



MAIN FINDINGS OF AMPERE REPORT ON DIRECT INJECTION

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AGICOA and SAA have commissioned AMPERE to carry out an **independent study on the use of Direct Injection television distribution in Europe**. The full study is available on request.

What is Direct Injection?

On a technical level, a Direct Injection retransmission takes place where a third-party making a retransmission to the public receives the original communication directly from the broadcaster via a private circuit (such as fibre, microwave, satellite, IP) that cannot be captured directly by the public. This can be differentiated from a retransmission that originates from an over the air signal, where both the retransmitting organisation and a free to air audience can receive the same signal.

Key Findings

The key findings of the Ampere study are as follows:

1. **Direct Injection is the most popular** broadcasting channel distribution method in the European Union with 78% of channels being delivered to TV platforms through Direct Injection, and 87% to pay TV platforms.
2. Direct Injection is carried out predominantly **cross-border**, with 82% of all Direct Injection within the EU by cross-border retransmission, and 79% of all cross-border retransmissions via Direct Injection.
3. Many cable and IPTV operators carry more than **90%** of their channels from Direct Injection sources.

Methodology

The analysis carried out is the most expansive and comprehensive analysis of the practice of Direct Injection in Europe to date. The research covered:

- 580 TV Channels
- Distribution to 250 free and pay terrestrial, satellite, IPTV and cable platforms throughout the EU;
- More than 8,400 channel operator paths analysed, including signals provided by public service broadcasters, national commercial broadcasters, channels run by platform operators, and those provided by international media groups;
- Detailed mapping of TV distribution in example markets (UK, Ireland, Netherlands and Germany) to highlight typical models;
- Detailed examples of specific TV companies' distribution models including ARD, Discovery Channel, NBC Universal, and RTL Netherlands;

About Ampere

Ampere Analysis, founded by an experienced team of sector-leading industry analysts, specialises in research, forecasts and insight on pay and multiscreen TV and content distribution, providing company-level analysis for every major TV market in the world. Ampere Markets provides global company-level analysis and forecasts providing an informed view of the fast-evolving TV distribution space. Ampere Channels provides analysis of the global TV channel market providing insight into carriage deals, channel reach and platform relationships.