



The Premium Television Market in Europe 2008–2013

Market & Data Reports

This study analyzes where Pay TV stands in Europe and the key factors currently transforming the market. The report provides a detailed presentation of the service offering by country and what strategies the leading Pay TV channels and groups are following to adapt to a rapidly evolving market.

Based on precise evaluations of each market, we make forecasts for 2013 by zone and by country

Key questions

- What is the outlook for Pay TV in a television industry rocked by the explosion of Internet content?
 - What impact will the economic crisis have on Pay TV's development? What role will Pay TV play in 2013?
 - What are the key factors in the evolution of the Pay TV market in terms of technology, competition and consumption patterns?
 - What are the features of Pay TV offerings by country?
 - What strategies can the various players in the Pay TV market adopt?
 - What percentage of Pay TV subscribers will be on satellite, cable, IPTV and DTT? How will the sector's revenue evolve?
- > Database (Excel):
Asia-Pacific, Europe, Latin America, North America
France, Germany, Hungary, Italy, Netherlands, Poland, Portugal, Spain, Scandinavia, United Kingdom



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3.2. Evolution of the Pay TV market in Europe

- What impact will the economic crisis have on the European Pay-TV market?

3.2.1. Technology factors

- HD increasingly common
- Improved quality of service
- HD service strategies
- HDTV: soon a basic service thanks to free-to-air DTT
- The arrival of 3D
- The development of mobile TV

3.2.2. Competition factors

- Competition from free-to-air multichannels
- Video sharing sites

3.2.3. Consumption pattern factors

- Time-shifted viewing
- Consumption of pre-recorded TV spurred on by the Web
- Online videos
- TV and video on the go

3.3. Primary European markets

- For each country studied: France, Germany, Hungary, Italy, the Netherlands, Poland, Portugal, Scandinavia (Denmark, Finland, Norway, Sweden), Spain, the United Kingdom
- Market structure: terrestrial, satellite, cable and IPTV broadcasting
 - Key data: sales figures, TV households, Pay TV households
 - Most important players in the pay-TV market
 - Distribution platforms
 - Number of TV subscribers
 - Total and TV sales figures
 - Number of channels
 - Pricing
 - Additional services

4. ORGANIZATION AND STRATEGIES

4.1. Player strategies

4.1.1. Underlying trends

- A necessary differentiation
- Quality and innovation central to strategy
- More robust services at (almost) the same price
- A mild trend towards internationalization

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- Premium channels: the race for exclusive rights and top quality
- Satellite packages: bonus for innovation
- Cable operators: making the most of network capacity
- ISPs and telecom operators: an "icing on the cake" approach?
- Commercial DTT operators: pay TV for all

4.2. Player profiles

For each player studied:

- Service launch dates
- Business areas
- Geographic coverage
- Business and financial data: overall and VOD sales, ARPU, number of subscribers, market ranking
- Partnerships: technical, content, telecoms, equipment, Internet, film
- Strategies: sales, pricing, innovation, services, customer loyalty

5. MARKET FORECASTS

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5.2. Forecasts for 2008–2013

For each zone and country studied:

- TV funding
- Pay TV's share of the market
- Digital gains ground
- Penetration of cable and IPTV
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Database (Excel)

Zones & Countries covered	Data analysed: 2008-2013
<ul style="list-style-type: none"> • World • North America • Asia-Pacific • Europe: <ul style="list-style-type: none"> - Germany - Spain - France - Hungary - Italia - Netherlands - Poland - Portugal - United Kingdom - Scandinavia (Denmark, Finland, Norway, Sweden) 	<ul style="list-style-type: none"> • Financing the TV : Revenues (EUR billions) <ul style="list-style-type: none"> - of which subscription - of which public funding - of which advertising • Access TV : TV households <ul style="list-style-type: none"> - of which digital free-to-air terrestrial HH - of which digital pay-TV terrestrial HH - of which digital free-to-air satellite HH - of which digital pay-TV satellite HH - of which analogue cable HH - of which digital cable HH - of which IPTV HH • Pay TV households (millions) <ul style="list-style-type: none"> - of which digital satellite - of which analogue cable - of which digital cable - of which IPTV*

Players included in the report

France	Germany	Hungary	Italia	Netherlands
<ul style="list-style-type: none"> • Canal+* • CanalSat • Free* • Numéricâble • Orange* • SFR-Neuf Cegetel • TNtop • TV Numéric 	<ul style="list-style-type: none"> • Arcor Digital TV (Arcor) • Alice Home TV (Alice/HanseNet) • Kabel Deutschland • Kable BW • Premiere* • TeleColombus • T-Entertain (Deutsche Telekom) • Unity Media Cable 	<ul style="list-style-type: none"> • Digi TV • Hello HD • T-Home (Magyar Telekom) • UPC Hungary* 	<ul style="list-style-type: none"> • Alice Home TV (Telecom Italia) • Dahlia TV • Fastweb • Mediaset Premium • Infostrada TV (Wind) • Sky Italia* • Tiscali TV 	<ul style="list-style-type: none"> • Canal Digitaal • Film1/Sport1 • KPN (Digitenne) • Tele2 Vision • UPC Netherlands* • Ziggo
Poland	Portugal	Scandinavia	Spain	United-Kingdom
<ul style="list-style-type: none"> • Aster • Cyfrowy Polsat* • Cyfra+ • Multimedia Polska • n (ITI Neovision) • TP Orange* • UPC Polska* • Vectra 	<ul style="list-style-type: none"> • AR Telecom • Cabovisão • Clix SmarTV (Sonaecom) • MEO TV (Portugal Telecom) • Zon TV Cabo* 	<ul style="list-style-type: none"> • Boxer TV • Canal Digital (Telenor)* • ComHem • Get (ex-UPC Norway) • Riks TV • Telia Sonera • TDC (YouSee) • Viasat* 	<ul style="list-style-type: none"> • Digital+ • Euskatel • Telefónica* • Jazztel • ONO • Orange TV* • R Cable • Sogecable* • Superbanda • Telecable de Asturias 	<ul style="list-style-type: none"> • British Telecom Vision • BSkyB* • Chellomedia* • Tiscali TV (Home Choice) • Top Up TV • Virgin Media*

* Detailed player profiles

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