

DigiWorld



atlas
collection

18th edition

The World Television Market

- Key trends in the TV market
- The leading companies' strategic positioning
- The battle of the broadcasting networks
- New stakes for the advertising market
- The market's innovative services



Forecasts up to 2011

By geographical zone and by country

Reception modes: terrestrial, cable, satellite, ADSL

TV households: free to air, pay-TV

Revenues: subscription, licensing fees, advertising

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Overview

The world television market has undergone abrupt and extensive disruption due to rapid changes in the technological landscape that have rendered programme branding and broadcasting commonplace, questioned programming linearity and chain of rights while encouraging the expansion of new consumer habits. In parallel, new players have also appeared which, up until now, were not part of the audiovisual sector.

These major changes have not disrupted in the short term the organization and economic models of incumbent media companies, which can still count on the power of their brands to attract and retain viewers' loyalty.

However, the future appears to be increasingly uncertain as network digitisation continues and reception equipment diversifies and becomes personalised: explosion of programming logic, rapid expansion of new consumption methods, especially among the younger generation, investments by new entrants that are often very powerful (telecom operators, Internet giants, etc.). These disruptions should result in changes in programmes and channel programming as well as distribution methods and economic models to adapt to the new audiovisual consumption needs.

This new television landscape, which is changing before our very eyes, is at the heart of this study which, for the 18th consecutive year, offers an accurate and consistent review of data and key questions on the topic, with constant care to facilitating access updated information.

Key questions

- What are the media groups' strategic positions?
- What room is there for new players (telecom, Internet operators)?
- What are the avenues for cooperation between media and telecom players?
- What is the potential for growth for digital TV around the world and by region?
- What impact will new broadcast networks have on dominant models (terrestrial, cable, satellite)?
- Mobile and personal TV: the new El Dorado?
- VOD offer expansion: towards TV programming delinearisation?
- Towards renewed interest in free television?

Report structure

- "The world television market" report is composed of several parts which are drafted and updated throughout the year.
- Each new instalment (CD or online) contains the latest version of the report's mainstay sections.
- Depending on the formula selected, IDATE will deliver:
 - for **reports purchases without updates**, the latest version available, including the most up to date information when the order is placed;
 - for a **one-year subscription**: two complete instalments, including enterprise and market analysis updates.
- Annual subscribers will receive two instalments, as follows:

| | July | December | Format |
|---|---------|----------|----------------|
| Executive summary | ■ | ■ | PDF |
| Analyses & Forecasts Markets Companies | ■ | ■ | PDF PDF |
| Monographs Markets Companies | ■ | ■ | PDF PDF |
| Databases Markets Companies | ■ | ■ | Excel Excel |
| Executive Notes | Monthly | | PDF |



Updates

Analytical reports

Databases

Market

Contents

| | | |
|---------------------------------|---|---|
| | Executive summary Overview of the latest market trends and company performance. | Executive Notes IDATE experts' analysis of the latest news from the DigiWorld. |
| | Markets | Companies |
| Analyses & forecasts | Regional and major national markets: <ul style="list-style-type: none"> • TV market by reception mode • Subscriber growth • Growth of multichannel households • Growth of digital households • TV revenues Key trends <ul style="list-style-type: none"> • Heightened competition from telco players • Rise of ADSL • Development of VOD offers • Advent of mobile TV • Personalised TV • Return of the ad model driven by new formats | Leading companies: <ul style="list-style-type: none"> • Top 20 media groups • Financial results • Strategic shifts |
| Monographs | For each region and country analysed: <ul style="list-style-type: none"> • Main characteristics • Outstanding events • Key regulatory issues • Figures: <ul style="list-style-type: none"> - growth of household equipment and TV reception modes - media revenue growth • Organisation: <ul style="list-style-type: none"> - leading TV channels - main pay-TV offers | For each media group analysed: <ul style="list-style-type: none"> • Positioning: <ul style="list-style-type: none"> - profile - business areas - international presence • Organisation: <ul style="list-style-type: none"> - background - shareholders - recent events • Key data: <ul style="list-style-type: none"> - financial results, operational data |
| Databases | For each region and country analysed, data for 1999-2011 <ul style="list-style-type: none"> • Media services market value <ul style="list-style-type: none"> - subscription, licensing fees, advertising • TV household breakdown <ul style="list-style-type: none"> - by platform (terrestrial, satellite, cable, ADSL) - by business model (FTA vs. pay-TV) - by technology (% of digital households) | For each media group analysed, data for 1999-2006/2007 <ul style="list-style-type: none"> • Financial results: <ul style="list-style-type: none"> - turnover, media revenues, EBITDA/EBIT, net profits • Balance sheet: <ul style="list-style-type: none"> - cash on hand, CAPEX, long-term debt • business area segmentation • subscriber base |

Regions and countries analysed

| | | | |
|----------------|-------------|-----------------------|-------------------------|
| World | Greece | Sweden | Mexico* |
| Europe* | Ireland | UK* | Asia - Pacific* |
| Austria | Italy* | North America* | Australia |
| Belgium | Netherlands | Canada | China* |
| Denmark | Poland | USA* | India* |
| Finland | Portugal | Latin America* | Japan* |
| France* | Russia* | Argentina | Africa - |
| Germany* | Spain* | Brazil* | The Middle East* |

* monograph included

Media groups analysed

| | | | |
|-----------------|--------------------|------------------|------------------|
| ARD-ZDF | Echostar | Modern Times | SBS Broadcasting |
| BBC | France Télévisions | Group | (TVSL SA) |
| BSkyB | Fuji Television | NBC-Universal | Sony Corporation |
| Cablevision | Network | News Corporation | TF1 |
| CBS Corporation | Globopar | NHK | Time Warner |
| CCTV | Grupo Televisa | ProSiebenSat1 | Viacom |
| Comcast | ITV | RAI | Vivendi |
| Doordarshan | Liberty Media | RTL Group | Walt Disney |
| DirecTV | Mediaset | RTVE | Company |

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