

CONNECTION  
THE WORLD  
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SUMMIT 2013

# CHALLENGES OF PAY TV IN SPAIN

A NEW ERA FOR TV

**FOX** International  
Channels

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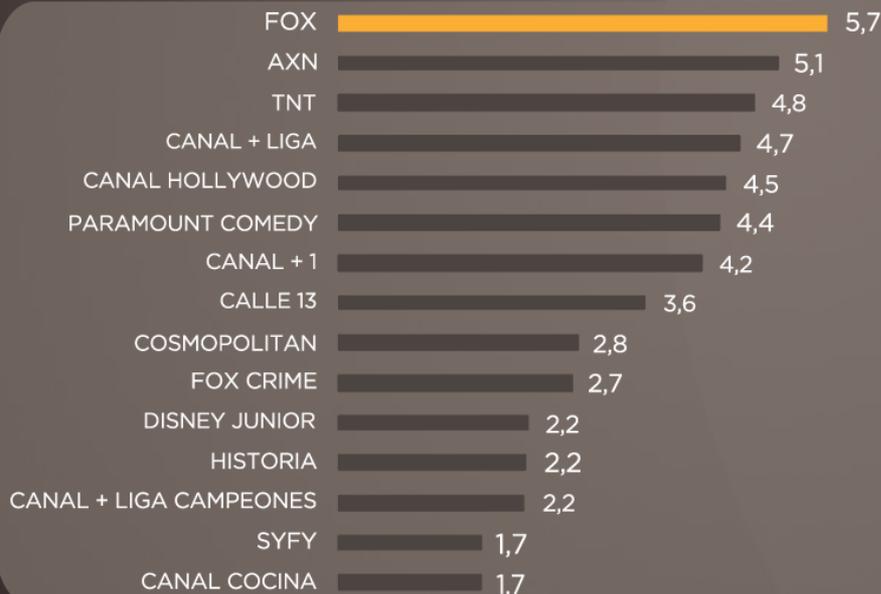


***CONTENT  
IS KEY***



# FOX HAS BEEN THE LEADING PAY TV CHANNEL OVER SEVERAL YEARS

- The only channel in Spain that has 100 % series which include the most popular American shows



SOURCE: KANTAR MEDIA ABONADOS 4+, SHR% (REF. PAY TV) - 2ºQ 2013 (ABR-19 JUN)



As well as running a Pay TV channel, we commercialise our content rights in Spain across sVod, tVoD, Catch Up, Mobile, Apps etc...

But how much of that viewing can we measure?



# A NEW ERA FOR TV

- ◆ Digitalization of households
- ◆ Rising numbers of channels
- ◆ Television as home Media Centre
- ◆ Broadcasting in HD and 3D, DTT, Web TV, Mobile TV
- ◆ Technological developments: different devices to watch TV: PC, phone and tablet
- ◆ Explosion of connected devices at home and on the go



# THE END OF TELEVISION AS WE KNOW IT



- ◆ How are viewers accessing to the contents
- ◆ From where are viewers accessing to the contents

## TV DEVICE EXPERIENCE

**WHAT IS THE  
STATE OF  
SPANISH PAY TV  
MEASUREMENT?**



# SPANISH PAY TV MEASUREMENT

## What we have for linear measurement

- Pay TV sample is 1081 HH and penetration is 21,4%
- Audiometric ratio PAY TV 3.370 HH vs. Total Population 3.487 HH
- No representation of household guests in the sample
- No measurement big events out of the home. Channel HORECA
- Sample without second residence

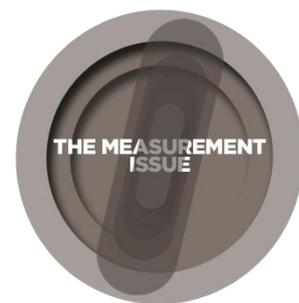
Source: E.G. M. 3rd wave 2013. Equipment, Individuals.  
Audiometric ratios estimated in House Holds



# SPANISH PAY TV MEASUREMENT

What we have for non-linear measurement

- ◆ The measurement for PVR?
- ◆ The measurement for VoD?
- ◆ The measurement for TV Everywhere?
- ◆ The measurement for Cross Media?

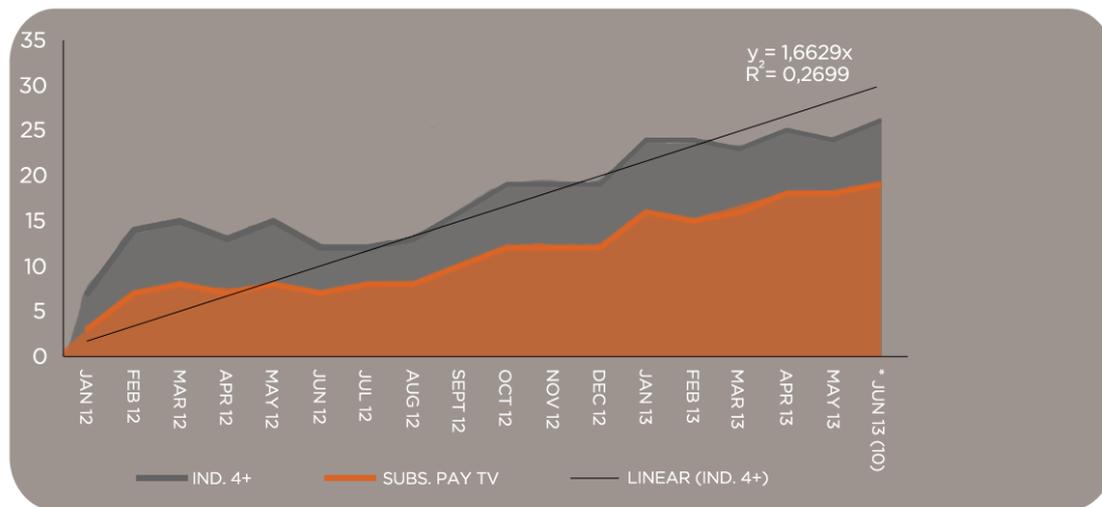


# SPANISH PAY TV MEASUREMENT



VOSDAL: not included in total TV data

- ◆ Month-to-month VOSDAL ratings are increasing
- ◆ Most of the VOSDAL consumption comes from Pay TV subscribers



Source: Kantar Media Rat(000) / Vosdal

FOX International Channels

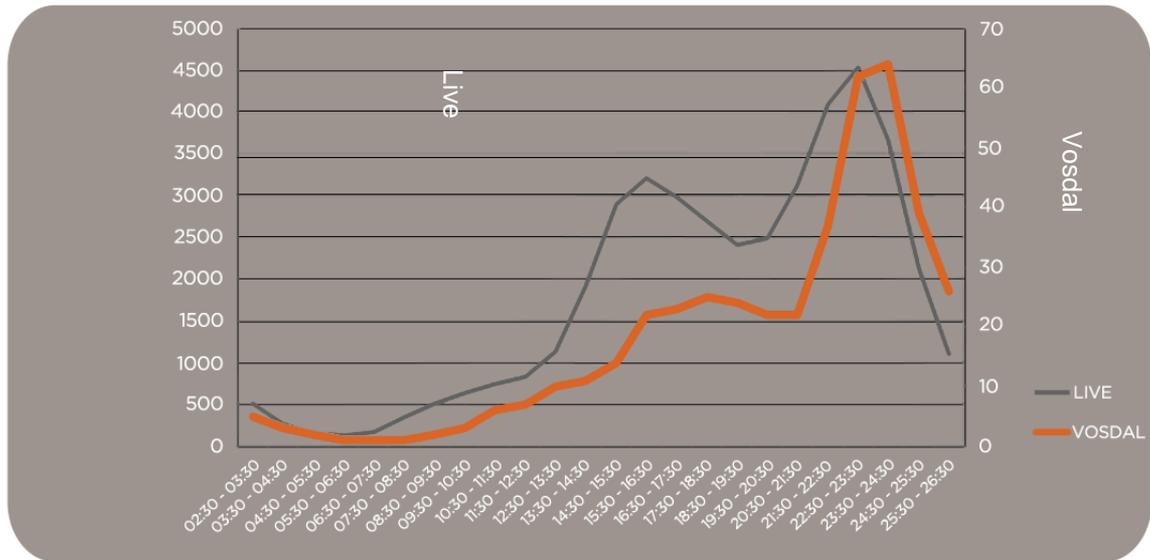
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# SPANISH PAY TV MEASUREMENT



VOSDAL: not included in total TV data

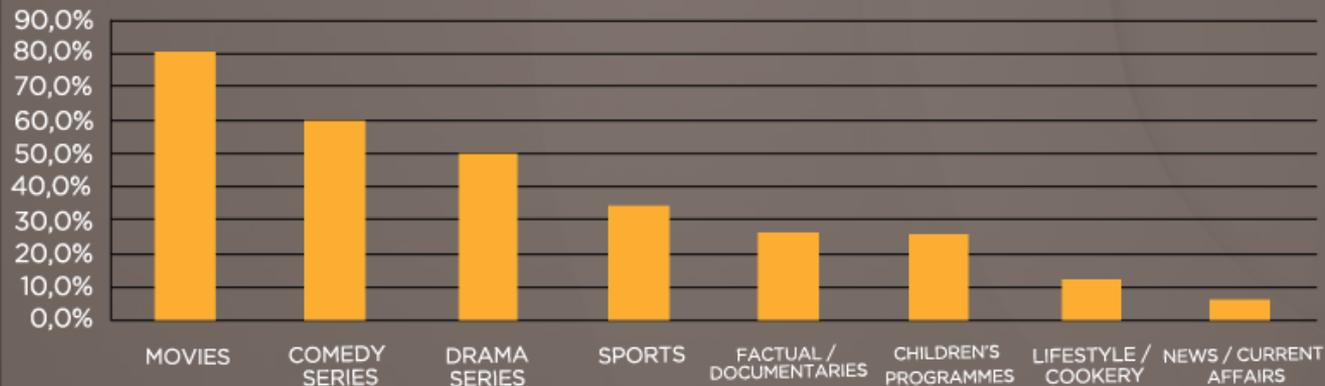
- ◆ Rating system shows us different consumption LIVE Vs. PVR



Source: Kantar Media Rat(000) / Vosdal / Target: Subscriber Pay TV

# WHICH GENRES ARE WATCHED ON PVR?

- Eight in ten viewers with PVR record Movies and 60% record comedy series with very little difference between the typology of the series: comedy and drama

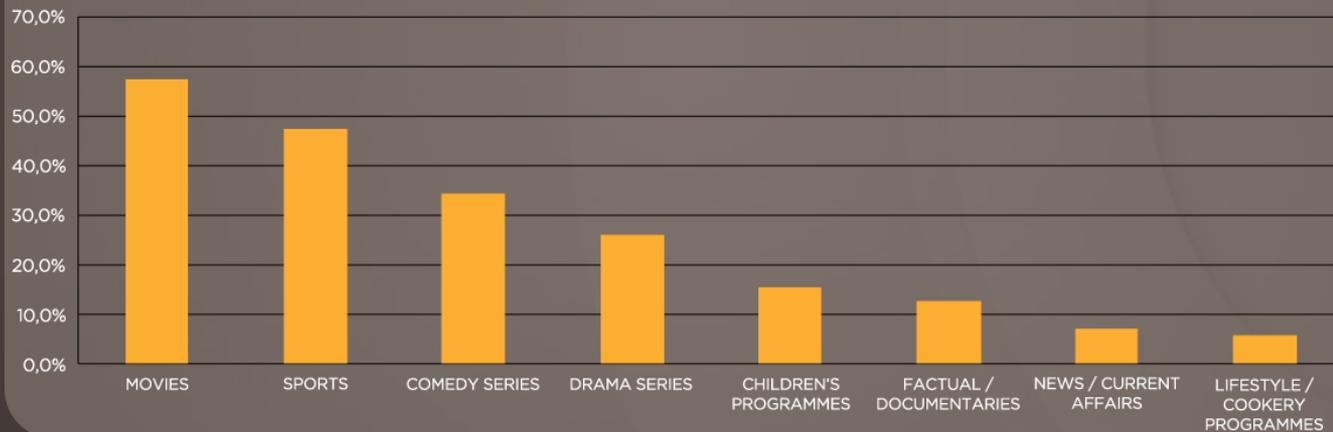


**GENRES ON  
PVR**

Source: Internal Survey. 1.200 interviews Canal+

# WHICH GENRES WATCHED ON TV EVERYWHERE ?

- Close to 60% watch movies and sporting events on second screen

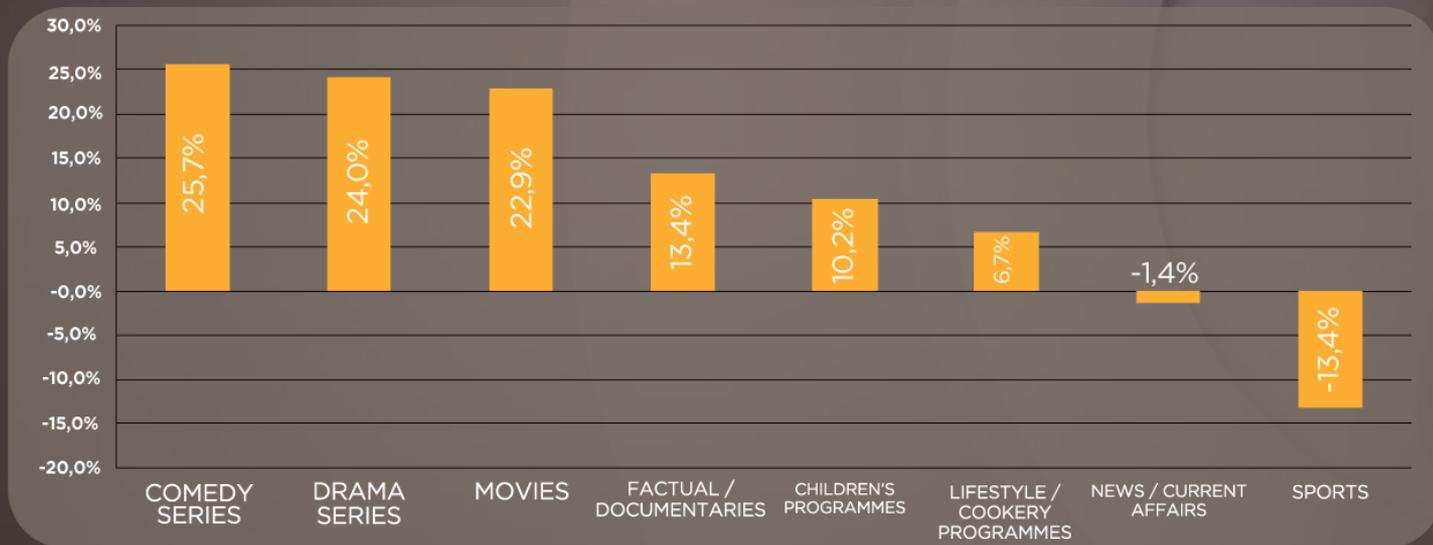


**GENRES ON  
TV EVERYWHERE**

Source: Internal Survey. 1.200 interviews Canal+

# PREFERENCES: ON PVR VS. ON TV EVERYWHERE

- There are different preferences by genre. Audiences are more likely to PVR Series and Movies. However, sports is a favorite genre to watch in other devices

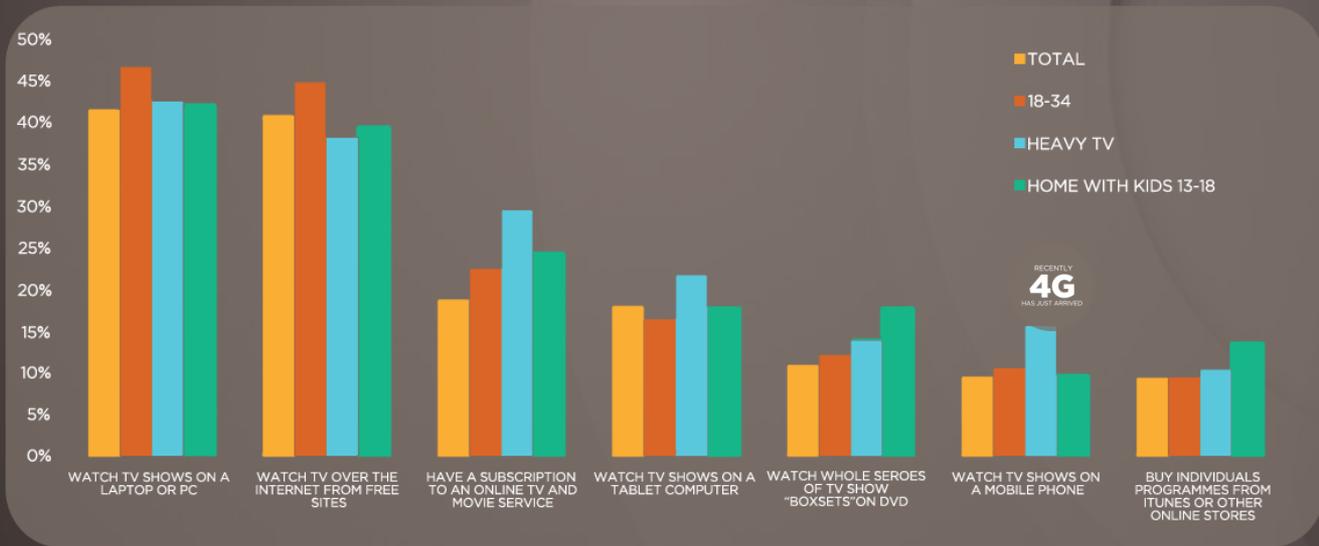


**PVR VS.  
TV EVERYWHERE**

Source: Internal Survey. 1.200 interviews Canal+

# WHICH TYPE OF DEVICES ARE USED TO WATCH TV?

- Pay TV subscribers already have very sophisticated viewing habits
- Heavy TV users prefer multi devices to watch TV: 30% use ONLINE TV and mobile service and more than 20% watch TV on tablet computers



Source: Internal Survey. 1,200 interviews Canal+

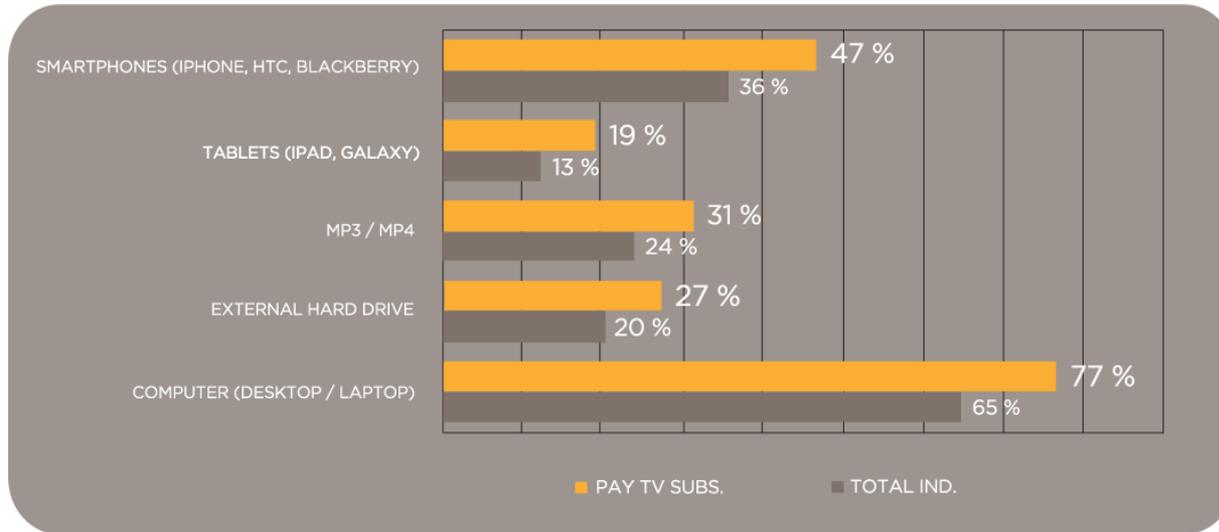
DEVICES TO WATCH TV

# MULTI DEVICE PENETRATION



## Pay TV Subscribers vs. Total Population

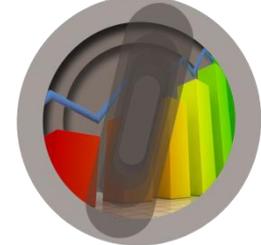
- ◆ Pay TV subscribers are more technologically advanced than total population



Source: E.G. M. 3rd wave 2013. Equipment, Individuals

**WHAT IS THE  
STATE OF  
SPANISH PAY TV  
MEASUREMENT?**





## LINEAR MEASUREMENT

- Sample size is reliable for Pay TV channels with a large distribution.
- Recommend RPD for smaller channels?

## NON-LINEAR MEASUREMENT

- There is measurement of VOSDAL but it's separated from TTV data
- We need Time Shifting consumption with more days (+7)
- We need VoD consumption We need TV Everywhere consumption
- We need a new measurement for cross – platform

# EVOLVING TV CONTENT RELEASE WINDOWS

- No reliable measurement 'visible' for NON-LINEAR



TIME REGARDING  
UNITED STATES

IND 4+

SUBSCRIBERS  
PAY TV

PAY TV	24 HOURS		337,251
FTA	3 MONTHS	1242,4	147,267

**11 %**  
OF SUBSCRIBERS



PVR	48 HOURS	?	?
CATCH UP	48 HOURS	?	?
T VOD	48 HOURS	?	?
SVOD	LAST SEASON	?	?

**TV CONTENT  
RELEASE**

# IN CONCLUSION

- Our challenge is to find a way of measuring ALL consumption



Lineal TV

Non-Linear TV

TV Everywhere

Cross-Media

Mobile

Etc.....

**TO  
SUM UP**



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