Thematic TV,

Key Economics & Prospects to 2016

A Euroconsult Research Report

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The breakdown of audience between the different channel themes remains largely stable

Audiences are spread between thematic TV channels

For thematic TV channels, the most popular themes on television are news drama and entertainment. As a result, pay-TV channels with the highest viewing shares are general channels (providing a mix of these kind of programs), sports and movies & series channels.

In countries where Pay-TV is established, roughly, almost 20 to 25% of the audiences goes to general and entertainment TV channels, 15 to 20% to movies and kids TV channels respectively, 10 to 15% to sports and documentaries channels respectively, while music and news channels gather roughly 5% of audience.

Breakdown of thematic audience

Samples of audience shares by theme amongst thematic TV Channels in Australia (2002), France (2006), and UK (2004)

	Australia	*France*	*UK*
Date of data	Full Year 2002	Jan-June 2006	Oct-Dec 2004
Pay-TV penetration rate	21%	33%	44%
Pay-TV audience share	**14%**	**11.9%**	**27%**
Breakdown of thematic TV audience			
General Entertainment*	25%	21%	18%
Movies	19%	15%	18%
Kids	16%	15%	17%
Sports	14%	13%	10%
Documentaries**	12%	10%	17%
Music	4%	5%	7%
News***	3%	3%	3%
Others	7%	19%	11%

* Excluding terrestrial channels viewership
** Including lifestyle, education and teleshopping channels
*** Including business and weather channels
Primary sources: Mediametrie Mediacabsat, Nielsen Media Research, Ofcom.

The audience of each thematic TV channel depends on the theme and the number of total channels inside the theme. As an example, there are 104 thematic TV channels available in France, which altogether gather 11.9% share of audience (or 37.2% for only pay-TV subscribers).

EuroSport, the leading thematic TV channel in terms of audience, gathers 2.4% of audience for total pay-TV subscribers. Out of a total of 16 million households subscribing to a pay TV offering, the channel retains an audience of 383,000 households.

Some thematic TV channels, like Histoire, or Mezzo, with a 0.1% audience share, are thus watched by around 16,000 households in average. As a consequence, audience can be low for thematic TV channels, and, the channel should thus very often find other financing means than advertising.

Premium and exclusive content drives the thematic audience

Overall, premium and exclusive content are strong audience drivers. According to the sample of countries for which data are available, the most audience generating themes are sports and cinema. In particular, movies movie channels can reach an audience share close to 20% followed by sports and children channels at around 15%.

Worth noticing, these themes are also those for which content can be particularly expensive in terms of rights acquisition. For most platforms, such channels can be considered as differentiators, resulting in potential battles to secure distribution exclusivity.

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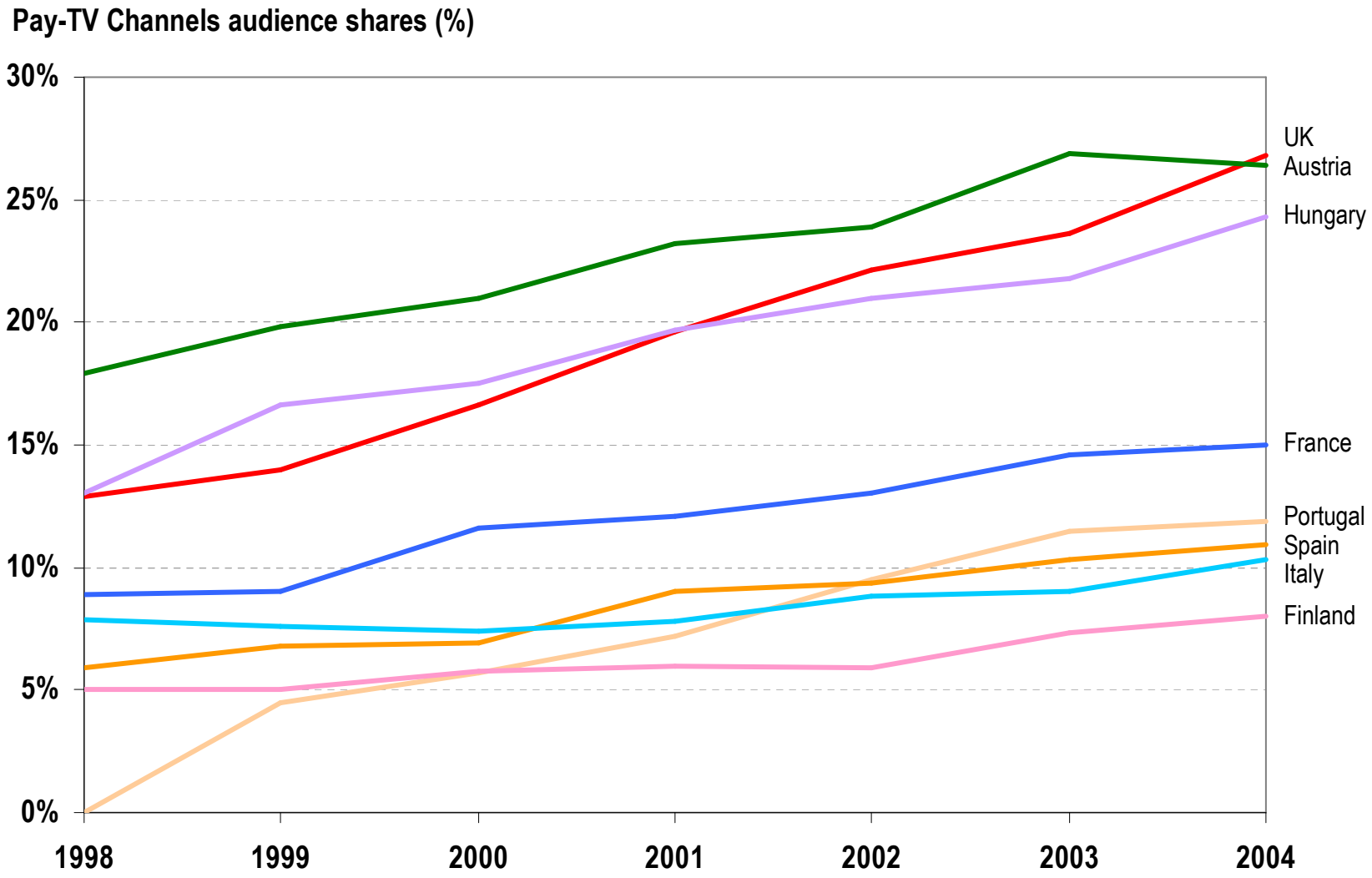
The increase in pay-TV channels audience shares in 8 European countries



Source: European Audiovisual Observatory

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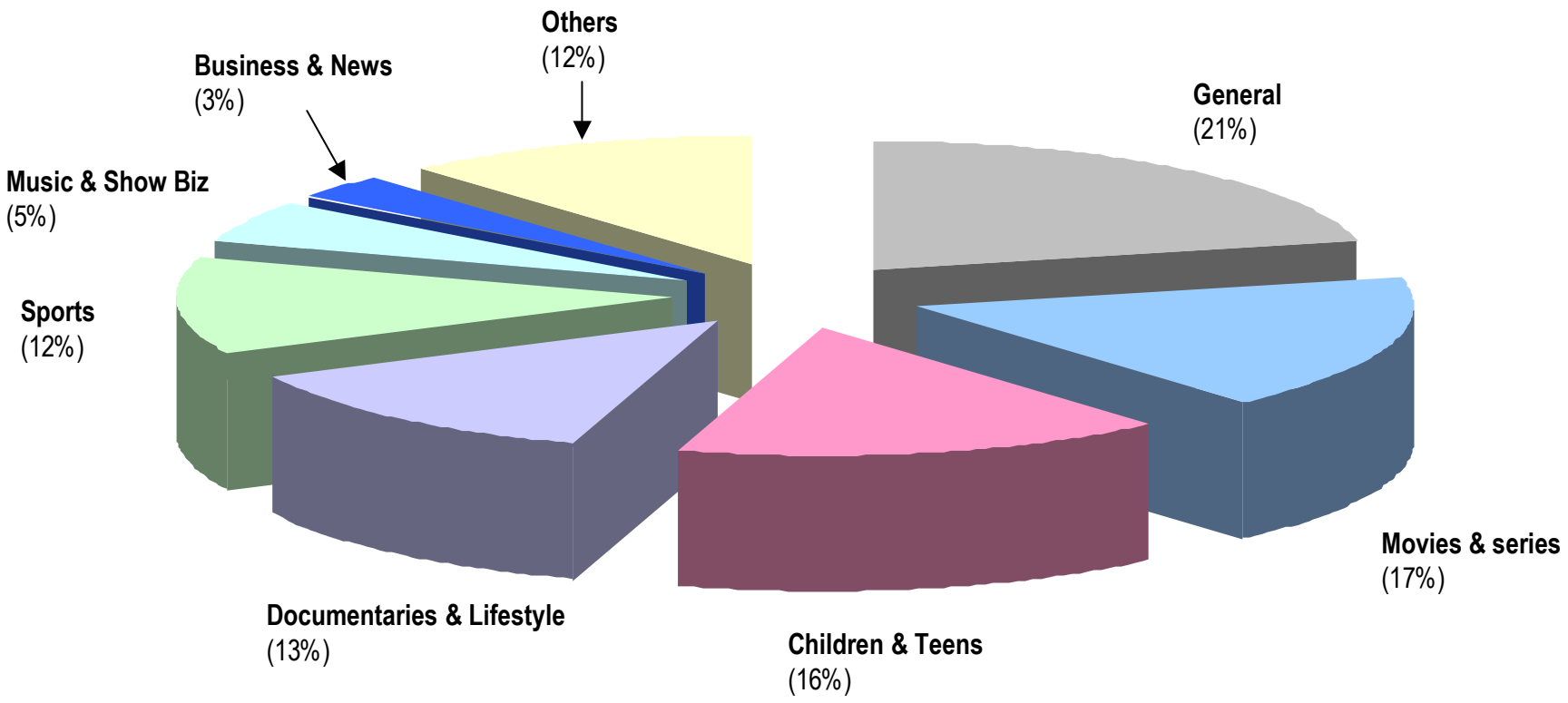
Breakdown of audience of thematic TV channels* by theme



* Excluding local general channels and PPV

Source : Euroconsult Estimates, based on detailed analysis of France, UK and Australia Statistics.

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