

Advertising: TV versus OTT - The future of commercial TV channels in the age of OTT migration

<https://marketpublishers.com/r/AF9D02CEF54EEN.html>

Date: February 2020

Pages: 85

Price: US\$ 3,300.00 (Single User License)

ID: AF9D02CEF54EEN

Abstracts

Commercial TV channels are facing a twin threat: the migration of both viewers and advertisers to the Internet. Television is still the medium that best withstands the advance of the Internet, but the fall in TV time, particularly amongst young adults, and the effectiveness of Internet advertising have raised fears of a reversal of the TV ad market that would threaten the survival of the commercial channels.

This IDATE DigiWorld study explores the strategies implemented by the main players in the main advanced markets in response to this risk. It identifies four categories of countries and analyses the differences between the developments expected in each category.

It gives estimates of the TV advertising market for 2024, allowing for the development of new activities by the channels in relation to OTT and targeted advertising.

The market analysis is performed according to major geographical region and for the key markets of those regions:

North America (USA)

Europe (Germany, Spain, France, Italy, United Kingdom, Sweden)

Africa/Middle East

Asia/Pacific

Latin America

The segmentation of advertising relates to:

Traditional TV (mass media)

Addressable TV (targeting on the TV via operators' STB)

Connected TV (targeting on the TV via open Internet)

On-demand TV (targeting on other Internet-connected devices)

Contents

1. EXECUTIVE SUMMARY

- 1.1. A tense commercial television sector
- 1.2. Commercial channels develop four strategic priorities to deal with changes in the market
- 1.3. Commercial TV has the resources to withstand the changes in the market

2. GLOBAL CHANGE IN THE AUDIOVISUAL INDUSTRY

- 2.1. Advertising market dynamics
- 2.2. An advertising market that reflects the changing consumption
- 2.3. ...and takes advantage of the benefits of the Internet
- 2.4. A necessary reaction by the commercial TV channels

3. THE STRATEGIES OF THE COMMERCIAL TV CHANNELS

- 3.1. France
 - 3.1.1. Overall dynamic of the television market in France
 - 3.1.2. TF1
 - 3.1.3. M6
- 3.2. Spain
 - 3.2.1. Overall dynamic of the television market
 - 3.2.2. Atresmedia
- 3.3. Italy
 - 3.3.1. Overall dynamic of the television market
 - 3.3.2. Mediaset
- 3.4. Germany
 - 3.4.1. Overall dynamic of the television market
 - 3.4.2. ProSiebenSat.1
- 3.5. United Kingdom
 - 3.5.1. Overall dynamic of the television market
 - 3.5.2. ITV
- 3.6. United States
 - 3.6.1. Overall dynamic of the television market
 - 3.6.2. Disney
- 3.7. Sweden
 - 3.7.1. Overall dynamic of the television market

3.7.2. MTG/NENT

3.8. Comparison of commercial TV channel strategies

3.8.1. Comparison of commercial groups' OTT approaches

3.8.2. Comparison of programmatic advertising developments for TV and online

3.8.3. Commercial channel strategies to deal with market changes

4. OUTLOOK FOR COMMERCIAL TV

4.1. Outlook for changes in commercial TV

4.2. Market forecasts

4.3. Commercial TV has the resources to withstand market changes

List Of Tables

LIST OF TABLES AND FIGURES

1. Executive summary

Advertising income of the main media from 2010 to 2019

Average time spent watching linear and nonlinear TV worldwide

Growth of worldwide advertising revenue by origin from 2018 to 2024

2. Global change in the audiovisual industry

Advertising revenue of the main media from 2010 to 2019

Proportion of the main media in the worldwide advertising market

Annual change in TV advertising revenue by region between 2010 and 2019 and between 2018 and 2019

Change in growth rate of TV advertising revenue in a selection of mature countries between 2011 and 2019

Growth in programmatic advertising on the Internet between 2014 and 2019

Share of mobile advertising as part of Internet advertising earnings

The worldwide trend of linear TV watching time between 2014 and 2018

Change in penetration rate of TV in homes by zone, between 2014 and 2019

Difference between TV penetration rate in homes for a selection of advanced markets in 2014 and 2019

Comparison of time spent per day on TV and on Internet (all uses together) worldwide in 2018

Average time spent watching linear and nonlinear TV worldwide

How the positioning of commercial channels is moving towards OTT

Degree of diversification of commercial channels within OTT

3. Strategies of the commercial TV channels

TV audience share in France among viewers aged 4 and over

Change in television viewing time per viewer in France

Distribution of the income from TF1 Group activities

Change in TF1 revenue and operating margin

Share of advertising in TF1 Group revenue

TF1 audience share in France among viewers aged 4 and over

Distribution of M6 Group revenue by division

Change in M6 Group revenue and operating margin

Share of advertising in M6 Group revenue

M6 audience share in France among viewers aged 4 and over

Television audience share in Spain

Change in television viewing time per viewer in Spain

- Breakdown of Atresmedia group revenue
- Change in Atresmedia revenue and operating margin
- Share of advertising in Atresmedia group revenue
- Antena 3 audience share among viewers aged 4 and over
- Change in Atresmedia economic model
- Television audience share in Italy
- Change in television viewing time per viewer in Italy
- Change in Mediaset group revenue and operating margin
- Share of advertising in Mediaset group revenue
- Canale 5 audience share among viewers aged 4 and over
- Television audience share in Germany
- Change in television viewing time per viewer in Germany
- Breakdown of ProSiebenSat.1 group revenue by division
- Change in ProSiebenSat.1 group revenue and operating margin
- Share of advertising in ProSiebenSat.1 group revenue
- SAT 1 audience share among viewers aged 4 and over
- Television audience share in the United Kingdom
- Change in television viewing time per viewer in the United Kingdom
- Breakdown of ITV group revenue by division
- Change in ITV group revenue and operating margin
- Share of advertising in ITV group revenue
- ITV audience share among viewers aged 4 and over
- Television audience share in the United States
- Change in television viewing time per viewer in the United States
- Breakdown of Disney group revenue by income source
- Change in Disney group revenue and operating margin
- Share of advertising in Disney group revenue
- ABC audience share among viewers aged 4 and over
- Television audience share in Sweden
- Change in television viewing time per viewer in Sweden
- Breakdown of MTG group revenue by income source
- Change in MTG group revenue and operating margin
- Share of advertising in MTG group revenue
- TV3 audience share among viewers aged 4 and over
- Forecast change in TV3 audience among viewers aged 4 and over
- 4. Outlook for commercial TV
 - Change in all TV advertising earnings in Sweden between 2018 and 2024
 - Change in all TV advertising earnings in the United States between 2018 and 2024
 - Change in all TV advertising earnings in the United Kingdom between 2018 and 2024

Change in all TV advertising earnings in Germany between 2018 and 2024
Change in all TV advertising earnings in France between 2018 and 2024
Change in all TV advertising earnings in Italy between 2018 and 2024
Change in all TV advertising earnings in Spain between 2018 and 2024
Change in all TV advertising earnings in the world by source between 2018 and 2024
Change in new TV advertising earnings between 2018 and 2024
Change in addressable TV earnings by region between 2018 and 2024
Change in on-demand TV earnings by region between 2018 and 2024
Change in connected TV earnings by region between 2018 and 2024
Change of strategic positioning of commercial audiovisual groups

I would like to order

Product name: Advertising: TV versus OTT - The future of commercial TV channels in the age of OTT migration

Product link: <https://marketpublishers.com/r/AF9D02CEF54EEN.html>

Price: US\$ 3,300.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/AF9D02CEF54EEN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:
Last name:
Email:
Company:
Address:
City:
Zip code:
Country:
Tel:
Fax:
Your message:

****All fields are required**

Customer signature _____

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <https://marketpublishers.com/docs/terms.html>

To place an order via fax simply print this form, fill in the information below and fax the completed form to +44 20 7900 3970

