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## The impact of digitalization on the strategies of pay TV in Spain

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### Abstract

**Introduction.** The landscape of the audiovisual market has dramatically changed over the last thirty years, and even more so since the implementation of digital terrestrial television throughout Europe. New suppliers of audiovisual content have appeared and a range of pay-per-view and free-to-air services now compete against one another. **Methodology.** After all the changes, we wonder if there is still space for pay TV and how the strategy of pay TV operators might be developed. To do so, we will analyse current offerings according to three key factors: business models based on revenue and offering, clients, and competitors. **Conclusions.** After data analysis, we conclude that in spite of the threats to pay television operators, pay TV will be the engine of change, and the willingness to pay will increase. Most of the popular free-to-air contents, will become premium content.

**Keywords:** Spain; pay TV; digitalization; business models; competition.

**Contents:** 1. Introduction. 2. Method. 3. Analysis of pay TV market. 3.1. Business models. 3.2. Clients. 3.3. Competitors. 4. The strategy of traditional pay TV companies. 5. Conclusions. 6. Notes. 7. References.

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### 1. Introduction

The audiovisual market has dramatically changed over the last thirty years, and even more so since the implementation of digital terrestrial television throughout Europe (García, 2008). New suppliers

of audiovisual content have appeared and a range of pay-per-view (PPV) and free-to-air (FTA) services now compete against one another.

Thanks to the digital revolution, devices have a higher focus on online interactive media, Internet TV, over-the-top (OTT) content, on-demand streaming media, and home networking access (Deloitte, 2011; Accenture, 2012; Tyron 2012) and the traditional audiovisual companies are trying to adapt their products to these new devices (Weeds, 2008; Doyle, 2010; Medina *et al.*, 2011; Medina and Prario, 2013). The main broadcasters have started to offer online contents on a payment basis.

The switchover from analogue to digital took place in Spain in April 2010, with a subsequent increase in the number of channels available to viewers. In fact, in 2013 there were 19 broadcasters: among them, four private national ones –Atresmedia, Mediaset, Veo TV and Net TV– and a public one –RTVE–; and there were 14 regional, one was private and the rest were public. All of them own 59 television channels, 33 were public, 26 private, 29 national, and 30 regional ones (Reig et al., 2014).

Clearly, the rise in the number of free TV channels, the launch of new OTT (over-the-top) services, and the piracy phenomenon have had an impact on the pay TV business model (Iosifidis, 2007; Deloitte, 2013).

Recently, there has been a big change in the habits of users related to their satisfaction with video consuming. As Table 1 shows 78% of interviewed participants recognized that having free-to-air TV was enough reason for not having pay TV services.

**Table 1. Reasons for not having pay TV services at home**

	2000	2011
Free-to-air TV is enough	15%	78%
It's expensive	33%	36%
We don't need it		31%
We don't watch TV a lot	32%	24%
Pay TV contents are not attractive		6%

Source: Demoscopia (2000)/CMT (2013)

In spite of the increase in free-to-air (FTA) channels, the penetration of pay TV increased from 22% to 25% in 2008 to 2013. In 2013, there were 4.17 million subscribers. However, if we compare the penetration with other European countries, it is very low. In the United Kingdom increased by 48% and 41% in France.

Television viewing habits have shifted, and that means that the traditional television ecosystem is changing. According to Turner (2011: 39), “the cost of television has become transferred from the advertiser or the state to the consumer”. The decreasing of advertising revenues can also affect the traditional broadcasting business model and current operators might look for new forms of streams related to direct payment or micropayments for content. However, Álvarez Monzoncillo (2011: 162)

outlines another paradox of the ecosystem: online consumption has increased but not the income coming from online sales. Kasuga *et al.* (2007) survey prove that cable TV carriers promote high-value added services, such as Internet access and telephone lines with a low charge.

## 2. Method

Taking into account all these changes, we wonder if there is still space for traditional pay TV operators in the Spanish market. The hypothesis of the current research is as follows: if there are more audiovisual contents available on a free basis, the willingness to pay for content will decrease. On the other hand, if the competition of pay TV operators has increased, which competitive strategy should companies design to survive? Therefore, the research questions formulated are:

RQ1. Will the willingness to pay for TV grow in the following years?

RQ2. Which ones will be the winning players?

To answer the research questions the paper will be divided first into part one, where an overview of the pay TV market in Spain will be outlined based on the business models, clients, and competitors. And finally, we will raise some managerial implications in order to outline future trends related to the pay TV sector.

Most of the data for the willingness to pay analysis comes from a survey designed by the research group Media Diet and conducted in 2008 and 2012. The target population consisted of all the residents in Spain aged 14 or older (40,606,471 inhabitants). Sampling was stratified by region and size of municipality. The selection of the interviewee in each home was made using gender and age quotas and was designed to be representative of the Spanish population. The final sample size was 1,000. For a confidence level of 95.5% this means a margin of error of 3.1%. Interviews were conducted by CATI (computed aided telephone interview). The average length of the interviews was 15 minutes. The response rate was 18.40%.

For the market analysis, we used data from the Telecommunication Market Commission (CMT, 2013) and other industry reports.

## 3. Analysis of pay TV market

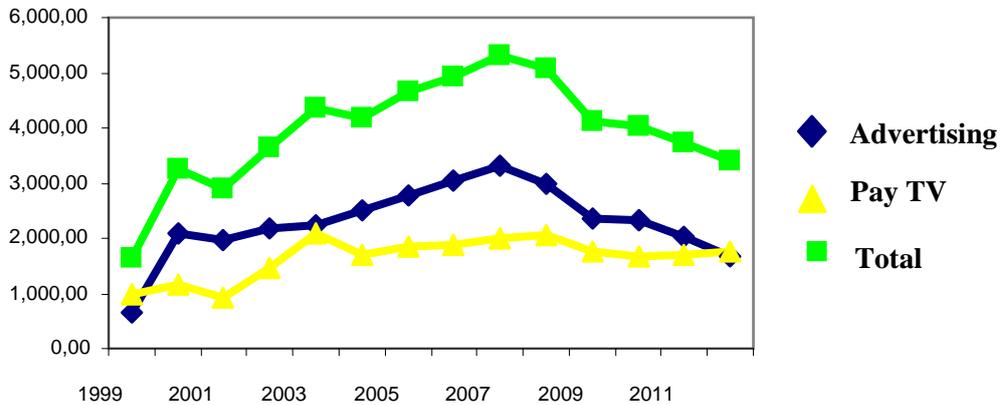
In this section, we will analyse the evolution of the data that shows the market position of pay TV in Spain. First of all, we will describe the main points of the business models related to revenue and content; secondly, we will analyse the evolution of the number of subscribers and the variables influencing the willingness to pay; and thirdly, we will outline the traditional competitors and the new ones.

### 3.1. Business models

The economic recession started in 2007 and produced a reduction in advertising revenue of most media companies. Spain is one of the European countries in which the recession hit hardest and, as a result, the media market has been strongly affected (Farias and Roses, 2009; Romero, Pérez, and Oroz, 2010; Medina and Barron, 2013). The decrease in advertising revenue has been higher than

pay TV revenue. It was near 50% between 2007 and 2012 (see Figure 1). The FTA channels had an inferior level of revenue than in the year 2000.

**Figure 1. TV Revenue (million €) (1999–2012)**

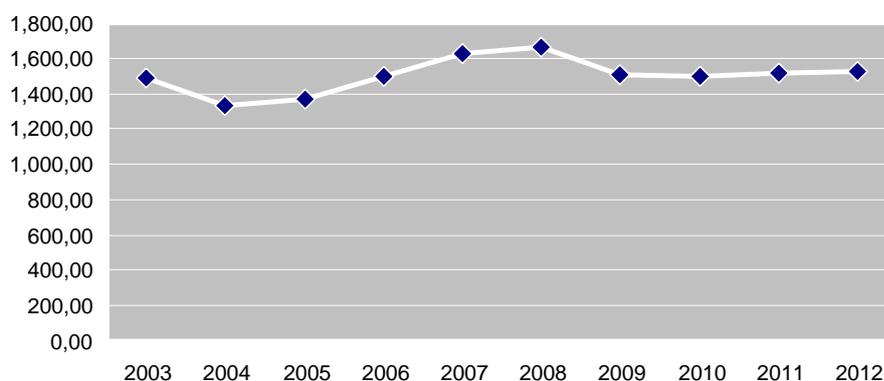


Source: CMT

Pay TV revenue increased from 2007 to 2009 and has been stable since 2009 thanks to the number of subscribers and the increase in the supply of low price pay TV. Since 1999, there were three years where pay TV revenue overcame advertising revenue, and three of them were years where the recession was a determinant factor.

As Figure 2 shows that revenue also grew from 2004 to 2008 and since 2009, the level of revenue has become stable. The decrease has not been as big compared to advertising revenue as we have seen because subscription revenue is less sensitive to economic recession.

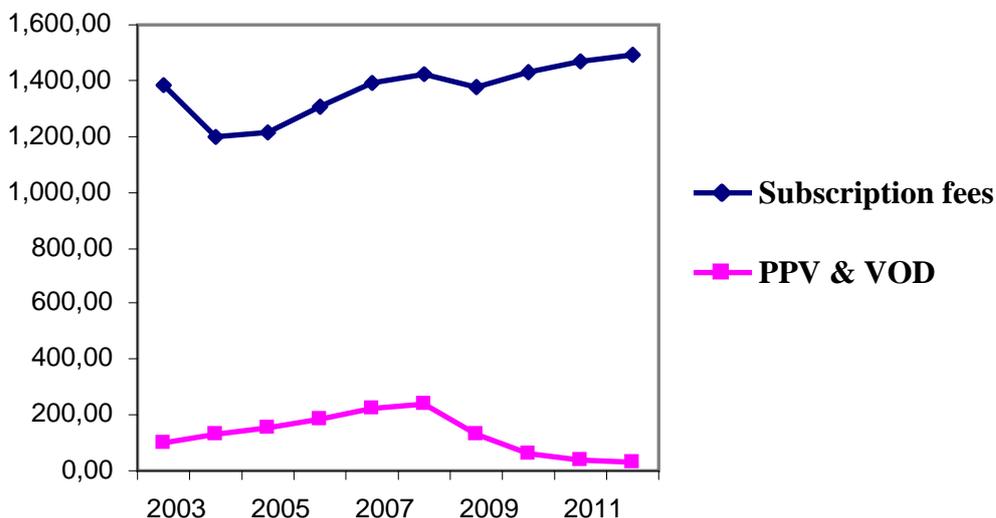
**Figure 2. Pay TV revenue (million €) (2003–2012)**



Source: CMT

One of the most important changes in the supply of pay TV offerings is the model for payment. As Figure 3 illustrates, since 2009 pay per view (PPV) and video on demand (VOD) revenue decreased mainly because companies did not offer any soccer matches on PPV.

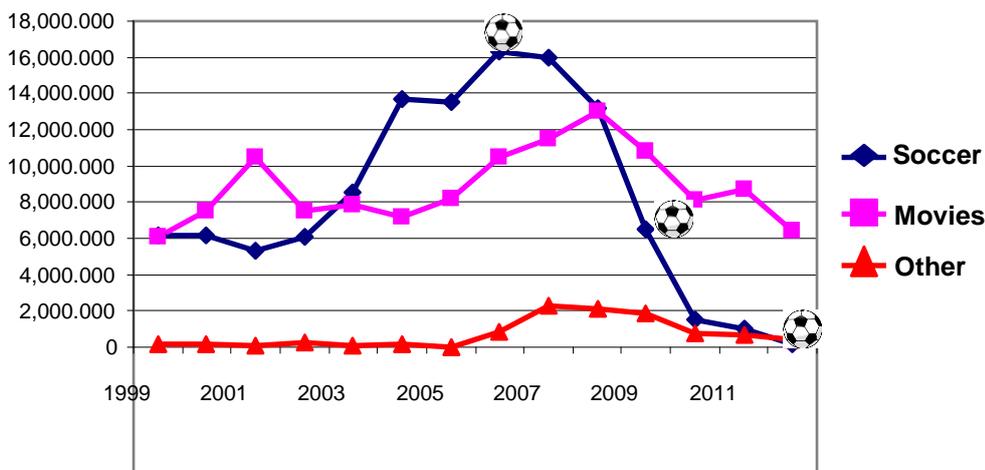
**Figure 3. Pay TV business models (2003–2012)**



Source: CMT

As Figure 4 shows, soccer has almost disappeared on PPV because it is cheaper to buy the whole season than just each match. There are different reasons: the most demanded matches are the ones where Real Madrid and Barça play and the costs of soccer rights increased. And on the other hand, some of the matches were broadcast by the FTA channels (García and Alcolea Díaz, 2013).

**Figure 4. PPV content (number of contracts) (1999–2012)**



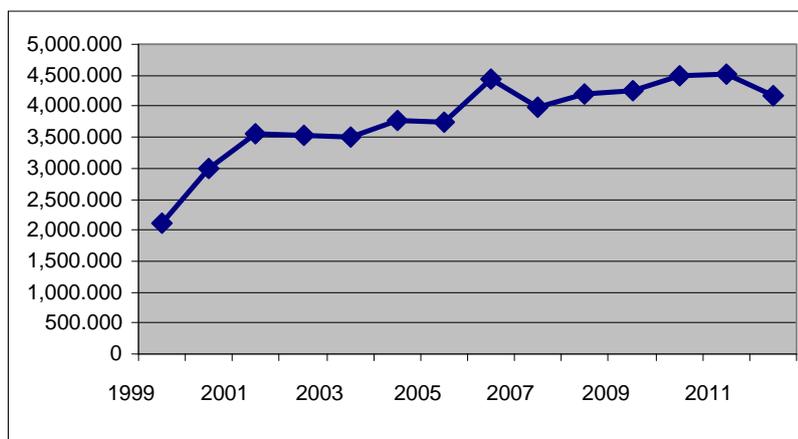
Source: CMT

### 3.2. Clients

In the next section we will discuss the evolution in the number of subscribers, the average expenditure for households, and the evolution in the willingness to pay after digital terrestrial television implementation.

One of the most surprising data is that the number of subscribers is twice as big compared to the 1990s. Furthermore, since 2007 this mainly remained stable, but it has increased since 2010 (see Figure 5).

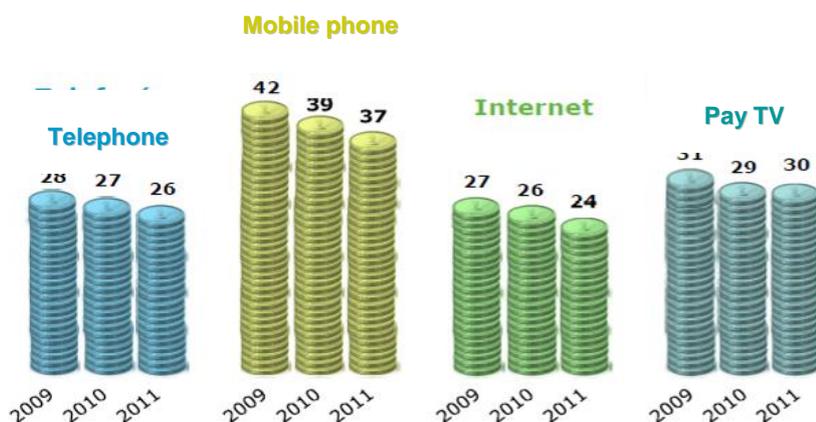
Figure 5. Number of subscribers



Source: CMT

Since 2007, the economic recession has had a big impact on the average household expenses for mobile phones and the Internet; however, pay TV has remained stable, as shown in Figure 6.

Figure 6. Household expenses (average € per month)

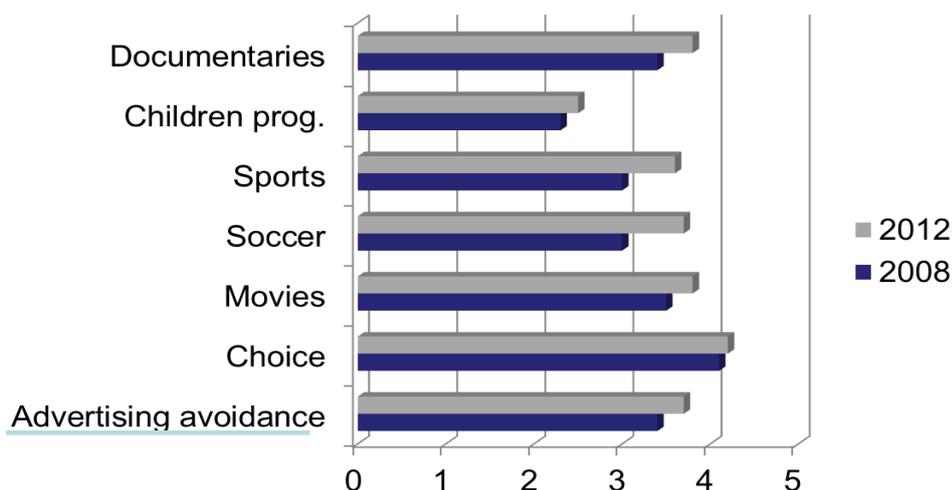


Source: ONTSI (2012)

In order to forecast future trends in pay TV in Spain, having all those figures in mind, we had two objectives to be achieved with our survey: what is the impact of the new DTT channels and the other factors on the willingness to pay for TV, and which variables have more influence in the willingness to pay for TV. We chose four variables: sex, age, education, and the professional qualifications of the head of household. We compared them in 2008 and 2012 to see if there was any significant change after the digital switchover. In the scale of the survey, “1” is less important and “5”, very important.

The influence of all the factors considered became more significant in 2012 than in 2008 (see Figure 7). There were few changes between the two periods regarding factors that moved people to subscribe in the context of the full implementation of DTT. The only factors that remained unchanged were the ones regarded as most important, such as the increase in choice for viewers and access to children’s programmes. Access to soccer matches and other sporting events were the factors that increased in importance in 2012.

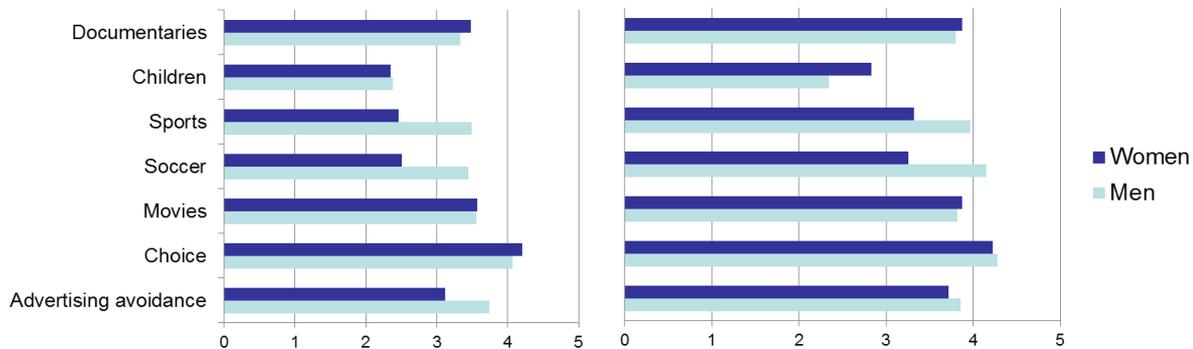
**Figure 7. Reasons for willingness to pay for TV**



Source: study survey

As Figure 8 shows, the results for the variable sex were quite significant. Men’s willingness to pay is higher than women. Subscriptions for men were strongly associated to watching soccer and other sports and to avoid advertising; for women, the willingness to pay for children’s programmes in 2012 was bigger than for men.

**Figure 8. Reasons for willingness to pay according to sex**

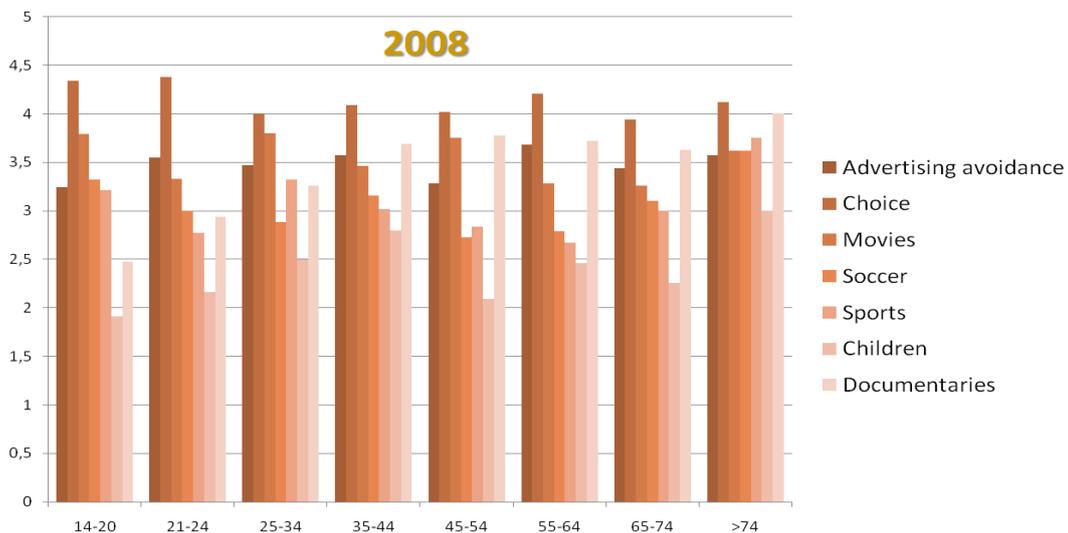


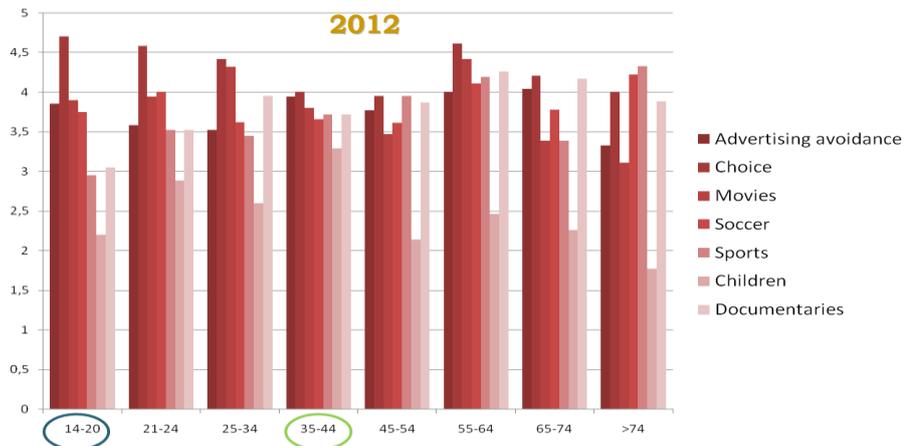
Source: study survey

According to Figure 9, age seems to be a relevant factor with significant differences among periods. Young people’s willingness to pay was bigger than the rest, especially because of the chance of more choice. However, elder people preferred documentaries and other sports rather than soccer, and had less willingness to pay for children’s programmes.

The influence of this variable is higher in 2008 than in 2012; therefore, it is becoming less important to predict the penetration of pay TV. Probably, increased access to online content and the increase in piracy are the reasons that explain why.

**Figure 9. Reasons for willingness to pay according to age**

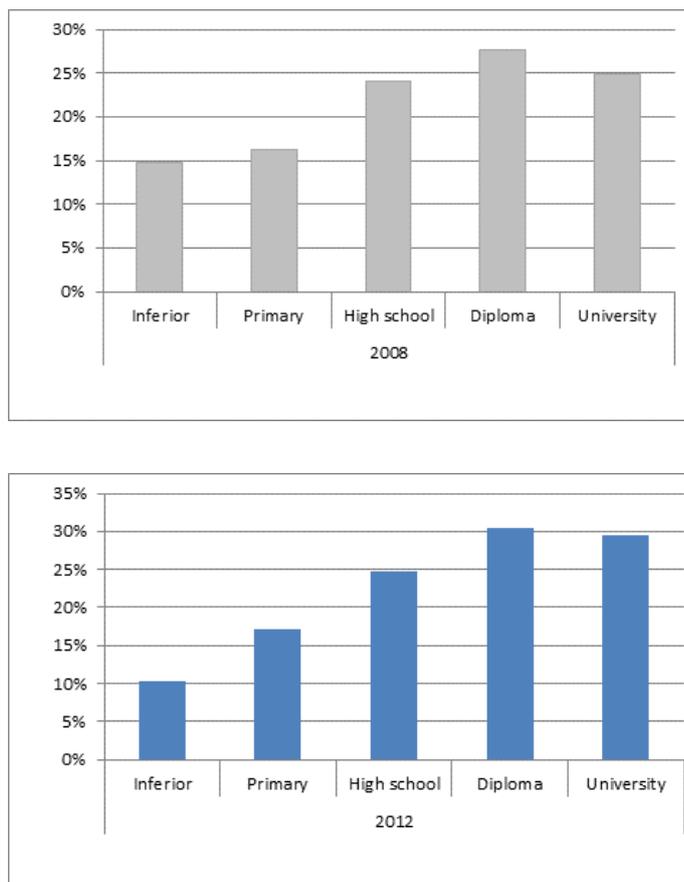




Source: study survey

The variable education seems to have a larger impact on decisions to pay for TV. The willingness to pay of people with a diploma and university degrees is larger (see Figure 10).

**Figure 10. Reasons for willingness to pay according to education**



Source: study survey

Finally, we made a model to explain the influence of the different socio-demographics, which is shown in Table 2. The economic situation based on the qualification of the head of household is the most important to explain the willingness to pay for TV.

**Table 2. Reasons for willingness to pay according to professional status**

	<i>Total</i>	<i>2008</i>	<i>2012</i>
Constant	-2.798** (0.544)	-2.096* (1.167)	-3.223*** (0.667)
Men	0.348*** (0.113)	0.334** (0.161)	0.359** (0.161)
Age	-0.007* (0.004)	-0.012** (0.005)	-0.001 (0.005)
Education	0.057*** (0.018)	0.038 (0.025)	0.076** (0.026)
<b>Head of HH position:</b> qualified professional	0.978** (0.447)	0.819 (1.081)	0.931* (0.495)
Head of HH position: nonqualified professional	0.899** (0.444)	0.628 (1.081)	0.963* (0.490)
Head of HH position: Housewife	0.792 (0.589)	0.984 (1.158)	-0.326 (1.142)
Professional position: retired	0.571 (0.479)	0.295 (1.110)	0.586 (0.548)
Year 2012	0.128 (0.110)		
N	1960	979	981
Chi-2	54.958***	28.982***	31.433***
Log L	-1023.669	-499.599	-520.894
Nagelkerke Pseudo R2	0.042	0.045	0.047

Source: study survey

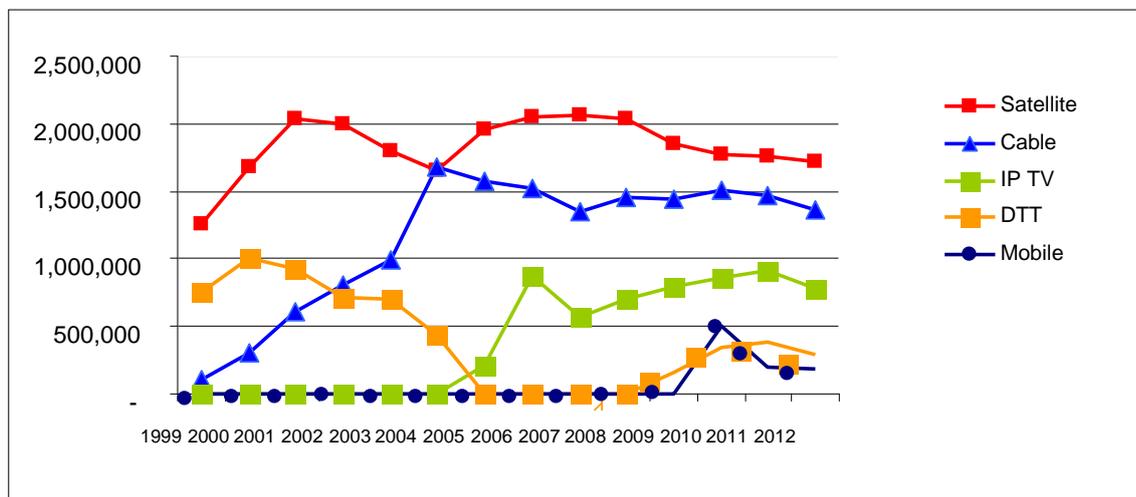
Finally, we will examine the evolution of the different distribution systems of pay TV. The data in Figure 11 might allow forecasting future distribution of pay TV.

Although the number of subscribers grew since 2007, in 2013 there was a significant decrease in services under cable, satellite, and IPTV. As a whole, the number of subscribers decreased to 12%, from 4,195,250 to 3,740,138 million subscribers between September 2012 to September 2013 (CMT, 2013).

If we go deeper into the pay television sector, we find some significant changes (see Figure 4). Cable and IPTV grew significantly from 2007 to 2012; especially cable that is almost getting the same number of subscribers as satellite. The reason is because these systems offer triple and quadruple

play –TV, telephone (fixed and mobile), Internet– as a flat fee model. However, satellite started to decrease since 2008 because its only service is audiovisual content. As well as DTT, mobile services got a smaller piece of the cake. In one year, from September 2012 to September 2013, the number of subscribers decreased 24% (accounting for 673,482).

**Figure 11. Number of subscribers (access) (1999–2012)**



Source: CMT

### 3.3. Competitors

In this section, we will outline the strategy of the competitors in the pay TV market according to market share, prices, and supply.

Traditional free-to-air channels started offering online premium content for any device. The three companies have created apps for their channels (atresplayer, atresmediaconecta, mitele for Mediaset content, +24, rtve.es, clan, and +tve) to access the public RTVE content through smartphones and tablets). Atresplayer had 4.8 million users monthly in 2013 and Atresmediaconecta had 120,000 (Sangrador, 2013). They have established different alliances with Google Play (in the case of Mediaset) or Facebook (for RTVE).

However, concerning the innovation of business models, Atresmedia seems to be more active since it differentiates among users, registered users, and subscribers, trying to maximize the information about users for advertisers. It is exploiting different revenue streams: advertising, premium, and PPV. The cost of Cost per Thousand (CPT) on video goes from €10–12 and graphic, €2–4, which is obviously much cheaper than traditional TV. In 2013 the income for online advertising was €9 million, which means 1.7% from TV advertising revenue –€512 million (Sangrador, 2013)–. However, it is important to not forget that the cost of online delivery is very low.

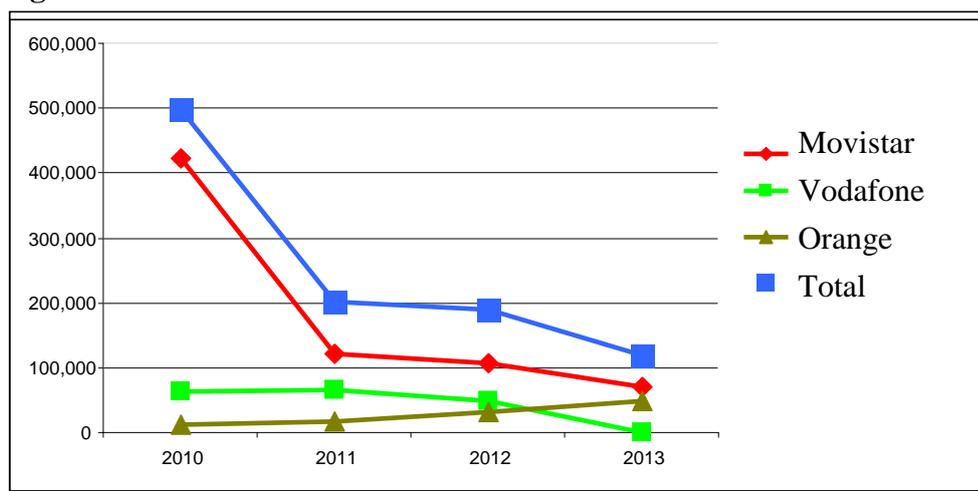
As well, it discriminates prices for users who are willing to pay for specific content: a) there is a premium fee of €2.69 monthly; b) to access premier content costs €1.81; and c). PPV is around €0.72. However, none of these prices are stable.

Offerings of the other big broadcaster, RTVE, are rooted in the foundation of public service, and are available for free. In September 2013 RTVE launched its Smart TV offering, called Botón Rojo (red point), which allows people with connected television sets to enjoy all the content available on the Internet.

Mediaset Spain, in contrast, is not as active as Atresmedia, probably because of its leadership in traditional business. Its PPV fee is more expensive than Antena 3 (€1.21–2.0), but the rest of the offer is free.

Mobile TV services did not seem for the moment as big competitors for traditional pay TV operators since Vodafone left the provision of audiovisual services in December 2012 (García, Pérez Serrano, and Alcolea Díaz, 2014). However, two years later, it has collaborated with Yomvi, the new platform for Canal +, to offer special process for TV contests to Vodafone clients. Among the rest of the telecom companies, the main provider is Telefónica and we will examine its strategy beyond mobile TV.

**Figure 12. Mobile TV subscribers**



Source: CMT

On the other hand, new online services belong to traditional distribution companies such as Filmin, Filmitech, Adn stream or Wuaki TV have started offering premium content for online services. The main business models of these companies are PPV and VOD, but there are also subscription quotas. Most of them are streaming, but there is also download content. What happens with most of these companies is that they might close down after one or two years because the content is not so good, the technical system is poor, and they do not get many subscribers.

Nubeox, which is an online video store owned by Planeta and Atresmedia, offers more than 1,500 movies from €0.99–3.99. Furthermore, there are other new competitors, such as Apple TV and

Google TV that are offering online content with cheap prices and a large catalogue of movies and TV series.

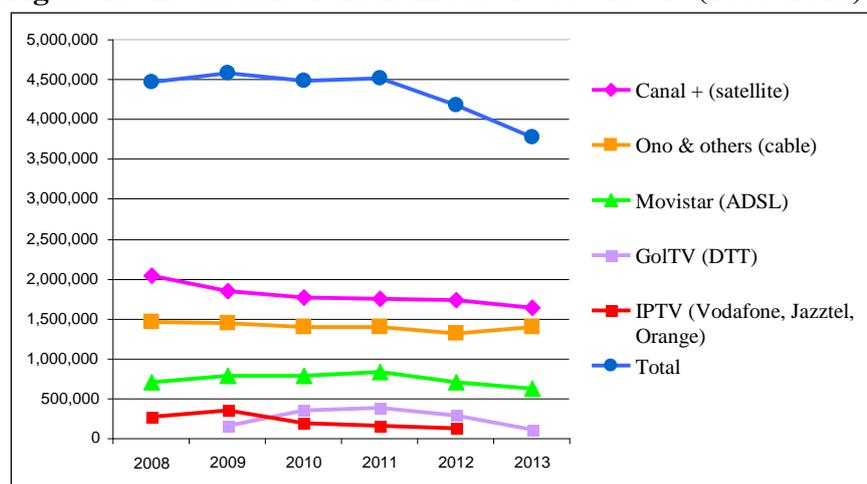
Consequently, what has happened to traditional pay TV companies?

#### 4. The strategy of traditional pay TV companies

Figure 13 shows the evolution of the number of subscribers of the different companies.

Regarding digital satellite offering, there is only one provider in the market—Canal +. The multiplatform satellite provider started in 1997 (Herrero, 2007), merged in 2002 with its competitor (Via Digital), and has become the only player (Bel, Calzada and Insa, 2007). In 2013, the number of subscribers was 1,646,172; 5% less than one year before.

**Figure 13. Evolution of the number of subscribers (2008–2013)**



Source: CMT

In the case of cable television, the decrease is even higher. However, in 2013 it got 1,390,800 subscribers, which was higher than 2012. Although there are more providers in the market, they do not compete among themselves because three of them –R, Telecable and Euskaltel– are regional providers in specific regions. The leader is ONO, which operates in many regions within Spain.

IPTV services from telecom companies enjoy a smaller piece of the cake and the decrease is even worse. The main provider is Telefónica since Vodafone left the provision of audiovisual services in December 2012. The service is called Movistar TV and in July 2013, Movistar TV GO was launched for all Movistar TV subscribers (it is the former “Imagenio”). Movistar TV GO follows the same idea as Yomvi, allowing subscribers to access content from different devices and at any time. Movistar is a digital TV offer of movies and series through PCs, tablets, and smartphones.

According to subscribers in 2013, the biggest companies were Canal + (44%), Ono (22%), and Imagenio –now Movistar TV (17%)–. Looking at revenues, the first one is again Canal + (68%), Imagenio (13%), and Ono (9%).

However, the market has changed. Multiplatform will be the common way to watch television content (PriceWaterhouseCoopers, 2013; Ametic 2012). Nowadays in Spain, 10% of households are using multiplatform for watching some content, especially sports programmes (IAB, 2013). What have the traditional companies done to adapt to the new digital scenario and competition?

In October 2011, Canal + launched a service called Yomvi to spread its offer to Internet, allowing subscribers to access content from everywhere and at any time. Yomvi is also available for Smart TV, being the only offer of digital pay services available for Smart TV and other mobile devices. In 2013, Movistar launched Movistar TV GO for all subscribers. Like Yomvi, it allows access to content from different devices at any time. Furthermore, Telefónica started a production company to produce and acquire audiovisual content.

ONO offers Tivo as an experience of Smart TV, since it allows enjoying apps and Internet content from the television set thanks to a special fibre optic cable for the service.

The main difference among them is price and supply. Ono offers triple play (Internet, TV, and telephone) for €29 per month, and that includes 90 TV channels of TIVO. Also, Yomvi offers just TV for €10 monthly for 25 TV channels. However, nowadays this is a very changing market depending on sales and mergers of the companies.

However, the finance situation of the big ones, except Telefónica, is poor because of the accumulated debt. Canal +'s net debt rose €3.400 million and the EBITDA (Earnings before interests, taxes, depreciation and amortization) decreased 82% from 2013 to 2012 (Prisa, 2012) in 2013, and in June 2014, Telefónica bought 56% of its shares. Therefore, Telefónica controls 78% of Digital +. Ono's debt was also €3.400 million in 2012 (Ono, 2012) , and currently it has been sold to Vodafone for €7.200 million.

## 5. Conclusions

In spite of the threats to pay television operators, according to Deloitte (2013), pay TV will be the engine of change, and from Alvarez Monzoncillo (2011: 138), the willingness to pay will increase. Most of the popular free-to-air contents, especially sports and movies, will become premium content, which is why pay television will grow in the following years. The financial recession of the public sector and the decrease of advertising revenue will liberalize some content and they could be part of the premium content of pay TV services.

However, the largest challenges are not only to increase the penetration of pay TV and to know how much people are willing to pay, but to have the most successful access system: just content through satellite, or quadruple or quintuple play offers through cable, ADSL, or IPTV.

In the end, controlling the ecosystem will be the key issue to survive. Technological development of the systems, the speed and quality of broadband, and the size of the companies will be key issues for the following years. The company with a better Consumer Management System and the ability to offer targeted content packages with different prices and for different devices will be the leader.

That is why telecom companies will dominate the market and they need to become big and vertically integrated. The payment for content will depend on popular and exclusive events. Hence, to have distribution rights of the content will be the other key to success in this business.

\*This article is a part of a research project entitled “Impact of digitalization on media production and consumption in Europe: The new consumer ‘diet’” (2010-2013), funded by Ministry of Economy and Competition ([ref.: CSO2010-20122](#)).

## 6. Notas

1 This article is part of a research project entitled “Impact of digitalization on media production and consumption in Europe: The new consumer ‘diet’” (2010–2013), funded by the Ministry of Science and Innovation (ref.: CSO2010-20122).

2 Internet Protocol television (IPTV) is a system through which television services are delivered using the Internet protocol suite over a packet-switched network such as a Internet, instead of being delivered through terrestrial, satellite, or cable.

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