

Multichannel TV - UK - October 2012

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"The long-standing divide between free and paid-for multichannel TV services is becoming distorted. Previously subscription providers such as Sky and Virgin Media have fought to win customers away from terrestrial and basic digital TV services, which have lacked comparable content.

The arrival of new portals, such as YouView, and smart TVs offers consumers a subscription-free method of accessing and interacting with content, without paying a monthly premium. The battle for exclusive content is important, but not as crucial as the method in which it is delivered in order to suit changing consumer behaviour."

– Paul Davies, Senior Technology Analyst

In this report we answer the key questions:

- How much of an issue is churn?
- Are subscription providers successfully generating loyalty?
- Has the battle shifted from content supply to content delivery?
- Do consumers really want 3D?

Multichannel TV has become a mainstream offering over the past decade, as the digital switchover proved to be a key driver in the rapid uptake of digital TV services. Whilst many consumers have simply upgraded equipment to benefit from free digital channels and services, the majority of the population now pay for TV via a monthly subscription. In this report, Mintel examines how the market will perform going forwards and investigates consumer opinion of TV providers and services. It investigates the changing conditions of the multichannel TV market, examining the impact on both free and paid-TV service providers, as well as the effect on consumers.

The multichannel TV market refers to providers of digital (non-analogue) TV, including both non-subscription services (eg Freeview/Freesat/YouView) and paid-TV providers, such as BSkyB, Virgin Media and BT Vision.

All digital televisions within the UK have access to a built-in Freeview tuner, providing free standard-definition channels. Some televisions also provide the option of a Freesat tuner, which requires the installation of a satellite dish. Freeview, Freesat (and YouView) services can also be accessed through selected set-top or digital recording boxes.

Paid-subscription services provide the consumer with digital channels and additional services through equipment supplied by the multichannel provider. This then requires the consumer to pay a monthly subscription.

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