The European TV broadcasting market

Statistics in focus

INDUSTRY, TRADE AND SERVICES

THEME 4 – 24/2002

SECTORIAL PROFILES

Richard Deiss

Television market in 2000 in the EU and USA: key figures

- In 2000, 96% of EU households had at least one TV (USA: 97%). The breakdown of main mode of reception was: 51% terrestrial, 31% cable and 19% satellite (USA: 68% cable, 9% satellite and 23% terrestrial). Average daily TV viewing time in the EU amounted to 204 minutes.
- The television market (excluding cable and satellite) in the EU had a turnover of 45 billion euro in 2000, with an annual growth rate of 5% for public TV broadcasters and 14% for private TV broadcasters between 1995 and 2000. The television market in the US amounted to about 62 billion euro in 2000 and grew by 26% compared to 1999.
- The main factors driving market growth in the broadcasting sector have been the increase of income from TV advertising and sponsorship as well as pay-TV. TV advertising grew 13% in the EU during 2000. In the US, advertising accounted for 61% of the TV broadcasting market and grew 27% during 2000 (Olympic games year).
- In 2000 there were about 11 500 TV and radio services enterprises in the EU, employing about 290 thousand persons (of which about 200 thousand in the TV sector).
- The US television market is the largest in the world, served by 1 580 television stations in 2000, of which 88% are commercial television stations.

	EU-15		USA	
	Turn-over (bn EUR)	per capita (EUR)	Turn-over (bn EUR)	per capita (EUR)
Total audiovisual market	**96.1**	**255**	**173.1**	**632**
TV broadcasting	**57.3**	**152**	**100.6**	**367**
TV market	45.2	120	61.6	225
TV advertising	26.8	71	60.4	220
Public TV	18.4	49	1.2	4
TV license fees	15.2	41	0	0
Cable and satellite	12.1	32	38.9	142

Table 1: Main TV broadcasting indicators for EU-15 and USA in 2000
Source: EU-15 Eurostat estimates mainly based on AUVIS data
USA: McCann Erickson

Contents

eurostat

Manuscript completed on: 30.05.2002
ISSN 1561-4840
Catalogue number: KS-NP-02-024-EN-N

Saturation in TV penetration

With a share of 96% of private households (148 million households) in the EU with TV sets in 2000, the TV penetration rate is reaching saturation, whilst the corresponding penetration rate for VCRs was 72%. Nearly 13% of the households receive digital transmission of TV (of which 1% terrestrial digital TV) and 5% owned a widescreen TV in 2000. About 3% of the households access the Internet via their TV (via digital TV/set-top box) in 2001 and equally many owned a DVD player in 2000.

The cable and satellite markets still have the potential to grow. In 2000, there were 13 million digital satellite, 4.6 million digital cable and 1.7 million digital terrestrial TV households in the EU. The UK is the biggest digital satellite TV market in Europe with about 5 million households, followed by France with 2.8 million and Italy with nearly 2 million households. UK and Germany are the two EU countries leading in the number of digital cable TV households. (See table 4).

Equipment: Strong growth in 16:9 format TV sets

The 16:9 format (widescreen) for TV sets became increasingly popular, with an average annual growth rate of 66% during the second half of the nineties. Video and DVD films are nowadays often adapted for this format. However, conventional TV sets with the 4:3 format still dominate, since just 5% of European households own a widescreen TV.

The number of TV sets worldwide doubled each decade in the seventies and eighties. Main growth appeared in Asia, accounting for 48% of TV sets in 1997. World growth declined during the nineties (+27% 1990-1997), however growth is still strong in regions with low TV penetration like Africa (+76% between 1990 and 1997).

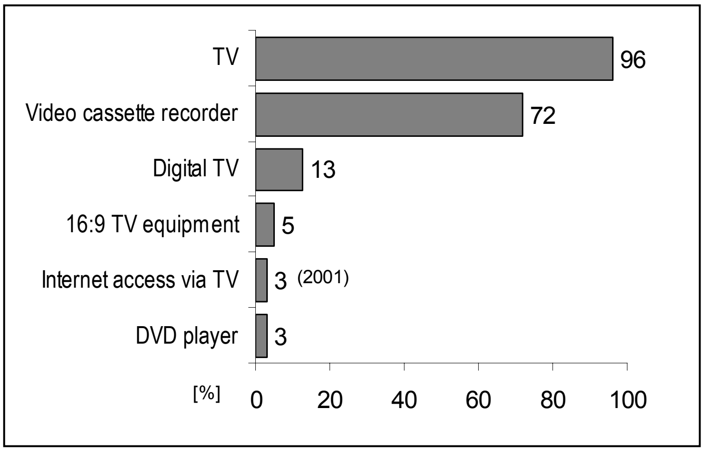


Figure 1: Percentage of households in the EU with television-related equipment in 2000, Source: Eurostat, AUVIS database, DG INFSO

	1996	1997	1998	1999	2000	Share of households 2000 (%)
EU-15	**1 127**	**1 891**	**3 307**	**5 752**	**8 560**	**5**
B/L/NL	213	355	625	965	1 380	12
B/L	:	:	:	:	430	10
NL	:	:	:	:	950	14
D	277	495	755	1 065	1 390	4
EL	2	8	16	31	60	2
E	28	64	129	239	420	3
F	360	525	805	1 285	1 610	7
I	27	54	119	234	420	2
A	15	39	64	94	130	4
P	4	11	19	34	150	4
UK/IRL	30	121	441	1 291	2 570	10
DK/FIN/S	33	63	118	238	430	5
CH	140	157	217	277	310	10

Table 2: Number of households with 16:9 TV equipment 1996-2000, (thousand units), Source: European Audiovisual Observatory

	1970		1980		1990		1997	
	Total (million)	per 100 inhabitants	Total (million)	per 100 inhabitants	Total (million)	per 100 inhabitants	Total (million)	per 100 inhabitants
Africa	2	0	8	2	25	4	44	6
North America	92	39	167	65	220	79	241	79
Latin America and the Caribbean	16	6	35	10	72	16	101	21
Asia	42	2	104	4	487	15	672	19
Europe	144	21	243	32	278	39	325	45
Oceania	4	19	7	30	10	38	12	43
World	**299**	**8**	**563**	**13**	**1 092**	**21**	**1 396**	**24**

Table 3: Number of TV sets worldwide, Source: UNESCO

Main mode of TV reception in 2001 in the EU was terrestrial

In the Netherlands and Belgium over 90% of the TV households watched cable TV in 2001. In Switzerland and Luxembourg also, the lion's share of the TV households (more than 70%) watch cable TV. Note that the figure reflects main mode of TV reception. A household may have one or several modes of reception. In the US, 68% of the TV households watch cable TV. In Germany and Ireland over half of the TV households watch cable TV.

Austria and Germany are the Member States having the biggest share of their TV households watching satellite TV (45% and 36% respectively). In Norway, Sweden, Denmark, the UK, France and Japan between one quarter and one fifth of the TV households watch satellite TV.

In Greece, Italy, Iceland and Spain, a majority of the TV households have to rely principally on terrestrial TV (between 79% and 97%). The share of terrestrial TV is also more than half in Portugal, France, the UK and Finland.

The average TV viewing time in the United States exceeded 4 hours and 20 minutes in 2000, about one hour more than the average viewing time in the EU: 3 hours and 24 minutes. During the two last decades the viewing time in the United States increased by 10%. During the second half of the nineties, the average viewing time in the EU increased by 9%.

Although there are some comparability problems, it is interesting to note that the two EU Member States with the highest viewing time, Italy and Greece, still had a lower average than the United States: nearly 4 hours in 2000. Third in the EU is the UK with 3 hours and 41 minutes. TV viewers in Luxembourg and Austria seemed to spend the least time in front of the TV: 2 hours and 4 minutes and 2 hours and 24 minutes respectively.

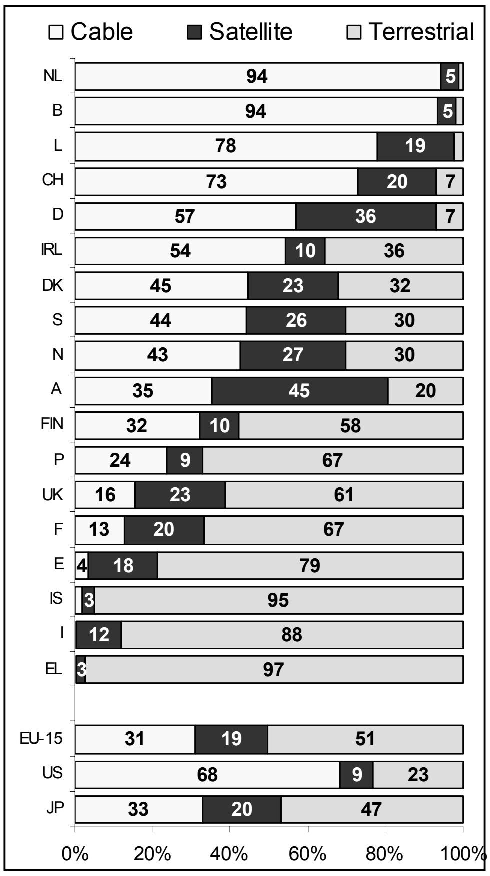


Figure 2: Main mode of reception among TV households in 2001, Source: SES-ASTRA

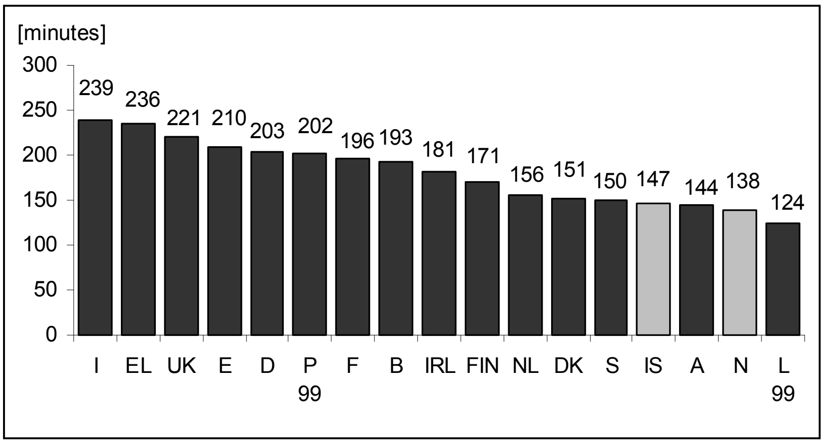


Figure 3: Daily TV viewing time in 2000, Source: Eurostat and European Audiovisual Observatory

2000	Digital Satellite TV	Digital cable TV
EU-15	**13.00**	**4.64**
EUR-12	**7.72**	**1.99**
B	0.04	0.00
DK	0.10	0.04
D	1.19	1.55
EL	0.02	0.00
E	1.37	0.00
F	2.83	0.33
IRL	0.06	0.00
I	1.92	0.09
L	0.01	0.00
NL	0.14	0.00
A	0.11	0.02
P	0.00	0.00
FIN	0.03	0.00
S	0.20	0.07
UK	4.98	2.54
IS	:	:
N	0.13	0.04
EEA	**13.13**	**4.68**
CH	0.09	0.00
US	:	:
JP	:	:

Table 4: Digital satellite and cable TV households, in million, Source: SES-ASTRA

TV broadcasting takes the largest portion of the turnover from audiovisual activities

In 1999 in the EU, there were about 290 thousand persons employed in about 11.5 thousand radio and television enterprises (of which about 200 thousand in the TV sector). There were on average about 25 persons employed per enterprise. In 1999 turnover amounted to roughly 52 billion euro or 180 thousand euro per person employed. 42 bn euro or 82% of the turnover came from TV broadcasting and 10 bn euro (18% of the turnover) came from the radio market. At least 115 thousand persons are employed by the large public service broadcasters. BBC Television, for instance, employed over 17 300 people, whilst BBC Radio employed 2 200 in 1996. Total employment of the BBC group in 2001 was 24 129 persons.

Radio and television have the largest turnover share of NACE 92 in the UK (77%), Finland (75%) and Spain (63%).

UK had the highest employment in the radio and television services sector with 87 thousand in 2000, followed by Germany with 83 thousand in 2000.

TV broadcasting is the audiovisual medium that takes the largest portion of the turnover: 60% in the EU and 58% in the US.

Public TV is the only sector where the EU market is larger than the US, mainly because of the low public funding of TV broadcasting in the US. All other audiovisual sectors are smaller in the EU.

The main source of financing of public broadcasters in the majority of EU countries is the license fee (62%). In UK, Germany, Finland, Greece and Sweden it accounts for more than 70%. Only in Spain and Ireland is advertising the main source of income.

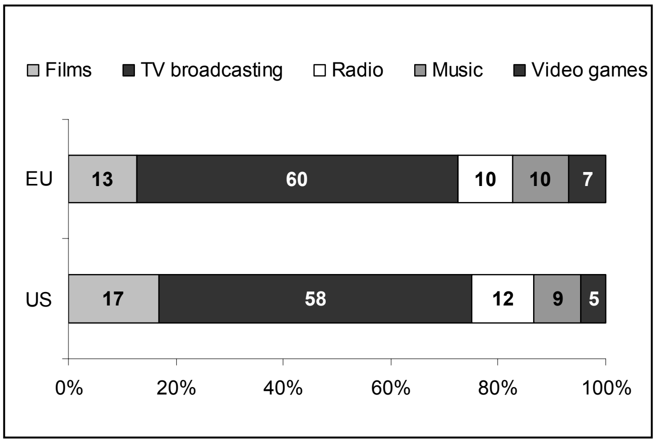
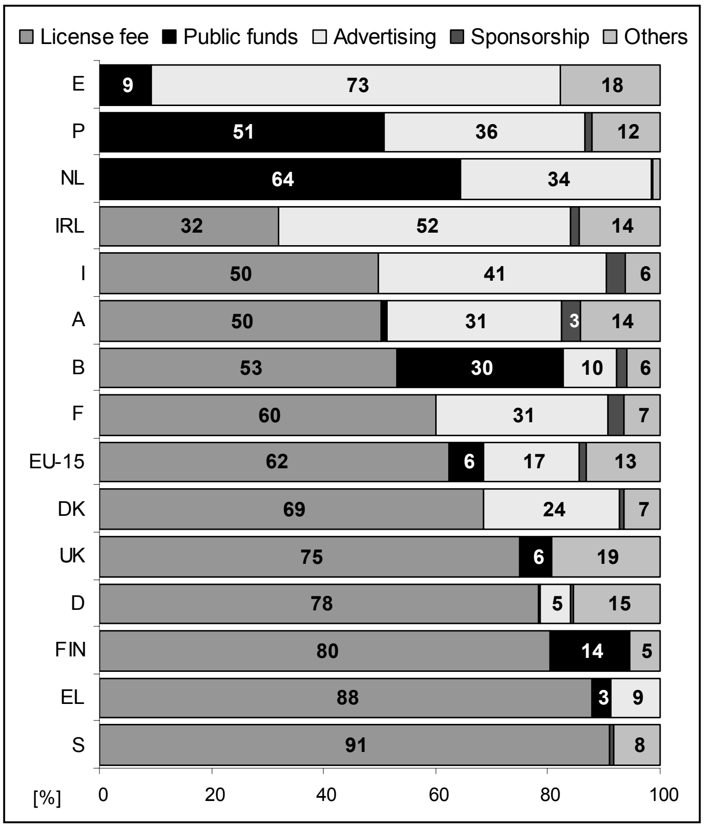


Figure 4: Share of turnover 2000 by main audiovisual sectors, Source: EU-15 Eurostat estimates mainly based on AUVIS data

	Number of entreprises	Employment (thousand)	Turnover (million EUR)
EU-15 a)	**11 500**	**290**	**52 000**
EUR-12 a)	**8 000**	**207**	**:**
B	618 c)	9 b)	902 b)
DK c)	257	2	239
D	676 c)	83 b)	7 126 c)
EL f)	604	8.2	:
E e)	1 108	30	3 411
F d)	734	17	6 963
IRL	:	:	:
I d)	2 566	25	5 549
L c)	38	:	:
NL	:	:	:
A e)	:	3	:
P c)	417	6	605
FIN c)	167	6	718
S c)	508	8	1 206
UK	3 055 b)	87 b)	17 669 c)
IS	30 b)	2 e)	99 b)
N	:	:	:
CH f)	86	1	:

a) Eurostat estimate 1999
b) 2000 data
c) 1999 data
d) 1998 data
e) 1997 data
f) 1995 data

Table 5: Radio and television services enterprises, employment and turnover (NACE 92.2), latest available year, Source: Eurosat, AUVIS database



(Others may include income from merchandising and programme sales)

Figure 5: Breakdown of funding of public service broadcasters in 2000, Source: Eurostat estimate based on EBU

		Turnover of Public TV broadcasters (million ECU/EUR)				Turnover of Private TV broadcasters (million ECU/EUR)				Income from TV advertising and sponsorship Public broadcasters (million ECU/EUR)				Income from TV advertising and sponsorship Private broadcasters (million ECU/EUR)			
		1997	1998	1999	2000	1997	1998	1999	2000	1997	1998	1999	2000	1997	1998	1999	2000
EU-15	a)	**17 080**	**17 570**	**18 230**	**18 400**	**18 700**	**20 370**	**23 580**	**27 030**	**:**	**:**	**:**	**4 940**	**:**	**:**	**:**	**10 260**
EUR-12	a)	**12 420**	**12 560**	**13 060**	**12 970**	**11 650**	**12 690**	**14 710**	**16 850**	**:**	**:**	**:**	**4 790**	**:**	**:**	**:**	**4 370**
B		218	224	233	245	143	156	180	207	42	:	:	647	:	:	:	60
DK		547	567	575	592	:	:	:	:	:	149	138	147	:	:	:	98
D		4 382	4 523	4 596	4 669	4 285	4 450	5 407	6 363	314	551	:	532	:	3 724	:	4 100
EL		:	:	:	:	:	:	:	:	23	37	:	160	564	585	:	481
E	c)	1 592	1 637	1 699	1 945	1 649	1 797	2 080	2 362	:	:	908	950	:	901	1 056	1 197
F		2 026	2 047	2 170	2 283	3 179	3 487	3 984	4 569	654	657	660	750	1 446	1 533	1 751	1 991
IRL		215	218	239	251	:	:	:	:	97	99	:	86	:	:	:	260
I	b)	2 156	2 096	2 286	2 484	1 744	2 087	2 286	2 484	809	861	909	1 016	1 413		1 200	1 311
L		:	:	:	:	323	351	407	466	:	:	:	:	:	:	:	255
NL		579	579	560	602	:	:	:	:	126	155	:	182	:	:	:	544
A		722	727	754	:	:	:	:	:	315	307	:	350	:	:	:	:
P		195	173	202	162	134	155	151	179	64	72	75	68	131	154	192	166
FIN	d)	339	333	318	332	191	209	213	222	:	:	47	48	184	193	:	200
S		386	392	397	404	213	231	248	297	2	3	:	5	201	217	232	274
UK		3 721	4 051	4 205	4 425	6 837	7 448	8 619	9 884	:	:	:	0	3 877	:	:	5 524
IS		19	20	22	23	25	29	35	:	5	6	6	7	:	:	:	:
N		327	338	:	:	133	153	:	:	:	:	:	:	:	:	:	:
CH		498	595	:	:	:	:	:	:	158	160	:	:	:	:	:	:

a) Eurostat estimate
b) Source: Autorità per le garanzie nelle telecomunicazioni (AUTCOM) and RAI
c) Source: CMT, Telecommunications Market Comission of Spain
d) Income from TV advertising & sponsorship of public TV: Receipts from TV and radio broadcasting
e) Income from TV advertising & sponsorship of public broadcasters, 2000 data: Eurostat estimate based on total TV advertising, except for E and FIN
f) Income from TV advertising & sponsorship of private broadcasters, 2000 data: Eurostat estimate based on total TV advertising, except for E,I,P and S

Table 6: Main economic data for TV broadcasters, Source: Eurostat, AUVIS database

Saturation of TV household penetration limits growth in revenues from public funding

Public service broadcasters have experienced a relatively flat development in public funds, whilst advertising and pay-TV income increased at a faster pace. The television market (excluding cable and satellite) in the EU had a turnover of at least 45 billion euro in 2000, with an annual growth rate of 5% for public TV broadcasters and 14% for private TV broadcasters between 1995 and 2000. Including cable and satellite, the total broadcasting market amounted to 58 billion euro.

The television market continues to account for a major portion of the total broadcasting market, with a share over 79% in the EU. The turnover of public and private TV broadcasters in the UK was estimated at 14.3 billion euro in 2000, followed by Germany with 11.0 billion euro and France with 6.9 billion euro.

The main factors driving market growth in the broadcasting sector are the increase of income from TV advertising and sponsorship as well as pay-TV. Advertising revenue is the prime source of financing, which doubled in the nineties to reach nearly 27 billion euro in 2000, even though the amount of advertising on every TV channel is regulated (Television Without Frontiers Directive 89/552/EEC, amended in 1997). About two thirds of advertising expenditure in the EU is directed towards private broadcasters.

Public funding is the second source of income for the broadcasting market (32% of the income for the broadcasting market in the EU), after advertising

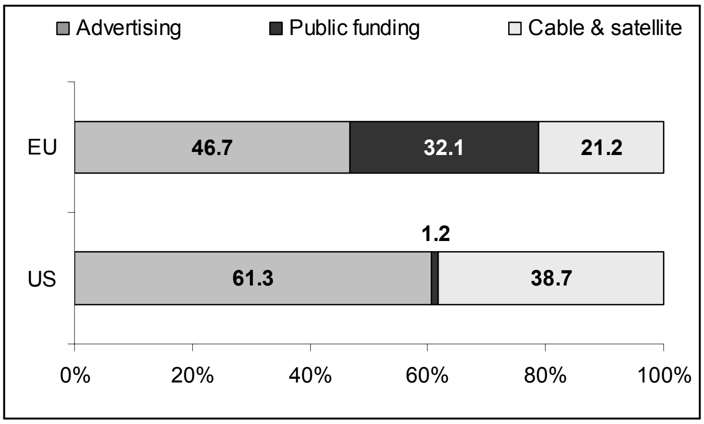


Figure 6: Breakdown of turnover, 2000 from TV broadcasting in the EU and US, Source: EU-15: Eurostat estimates mainly based on AUVIS data and on OECD data for cable& satellite. USA: Standard & Poor's and AC Nielsen

(47%) and before subscription fees (21%). In general, public funding consists of license fees paid by private households or by subsidies from public bodies. While public funding only accounts for 2% of the total market income in the United States, the ratio varies between 20% to 55% in many European countries: over 50% in Sweden, Finland, Denmark and Austria, but less than 20% in Portugal, Greece, Spain and Luxembourg. In Portugal, Spain and Luxembourg there are no license fees for TV at all. In 2000, the Netherlands also dropped the license fee.

All EU countries have at least one public TV programme service with nationwide distribution

The number of public TV programme services in the EU has increased from an average of 2 channels per country in 1980 to nearly 4 channels per country in 2000. The number of public channels in the EU amounted to 57 in 2000.

The EU country with the highest number of public TV programme services with nationwide distribution is Germany with 14 channels. Italy is second with 6 and Spain third with 5.

The US television market is the largest in the world, served by 1 580 television stations in 2000, of which 88% are commercial television stations

The audience share for public broadcasting in the EU declined from over 50% in 1990 to 39% in 2000.

The average public broadcast time in the EU is 17 hours per day. In Austria, Germany, France, Italy and Ireland the average public broadcast time exceed 20 hours, twice as much as in Belgium and Sweden.

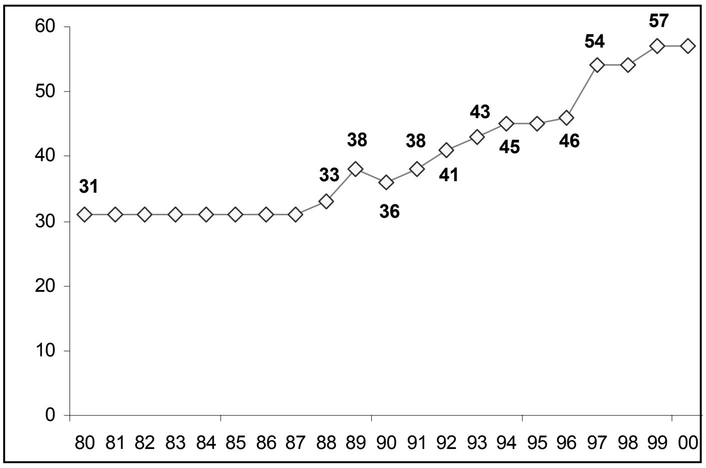


Figure7: Number of public TV programme services with nationwide distribution in the EU, 1980 - 2000: Source: Eurostat, AUVIS database

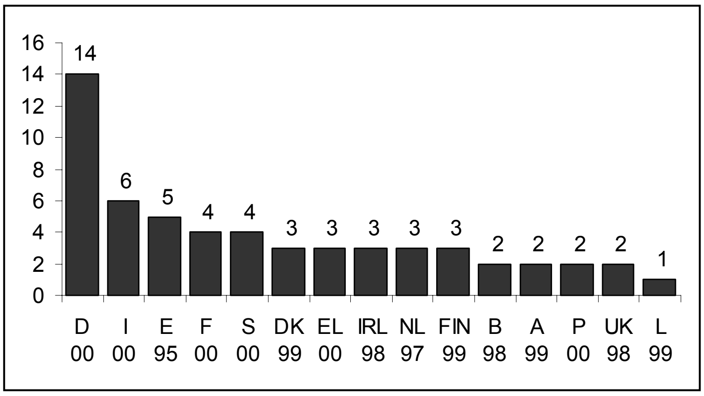


Figure 8: Number of public TV programme services with nationwide distribution in EU Member States, Source: Eurostat, AUVIS database

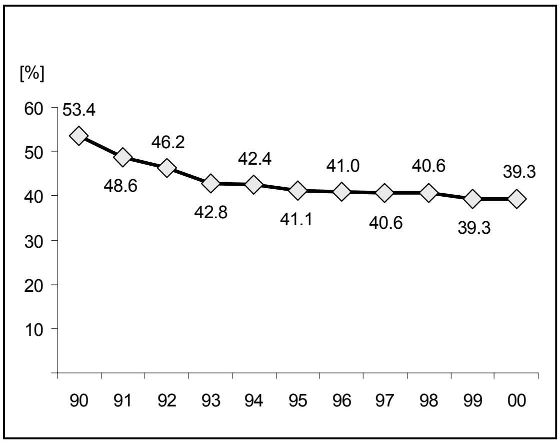


Figure 9: TV audience share for public service broadcasting in EU-15, Source: Eurostat estimate based on EBU

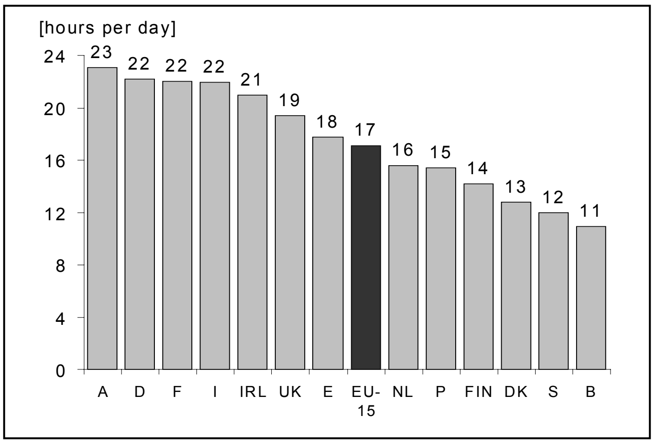


Figure 10: Average public broadcast time (hours per day), in 2000, Source: Eurostat estimate based on EBU

'Fiction' represents the main part of the public broadcasting output in all EU countries except in France and Portugal where fiction is surpassed by 'other' (culture, education, documentary, children and animation programmes) and in the Netherlands where the output of 'information' is slightly larger than 'fiction'.

Notes:

Fiction includes TV series, TV serials, sitcoms, plays, TV films, animation, and cinema films.
Entertainment includes Light entertainment (game shows, quiz, etc.), Infotainment (talk shows, reality shows, etc.) and Music.
Music means all aspects including "classical music programmes".
Information includes magazines and debates, but excludes educational programmes, sports and news.
Other includes culture, education, documentary, children and animation programmes.

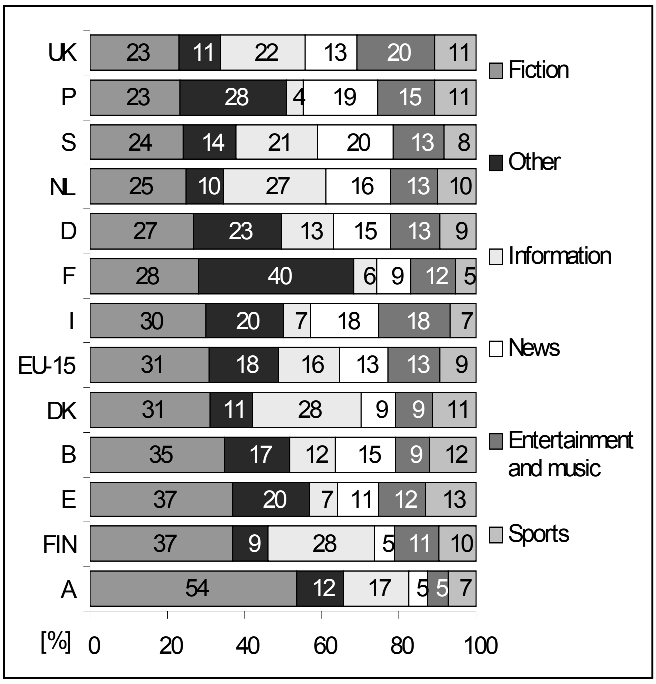


Figure 11: Public service broadcasting output in 2000, genre by genre (%)
Source: Eurostat estimate based on EBU

➢ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

This Statistics in Focus (SiF) is based on annual audiovisual services statistics in the **AUVIS** domain from Eurostat's reference database New Cronos, Theme 4 Industry, Trade and Services. Some additional data were added using European Audiovisual Observatory, European Broadcasting Union, UNESCO, SES-ASTRA and the European Commission Directorate General for Information Society (Eurobarometer survey) as a source.

AUVIS — Eurostat enquiry and database on audio-visual services. The AUVIS questionnaire is sent out each year to national statistical institutions to collect existing structural and functional data on the audio-visual sector.

Television households: — Number of private households equipped with at least one TV broadcast receiving equipment (TV set).

Annual TV licence fee : — Annual amount of the fee inclusive of any VAT charges payable (to be paid by private households) for authorisation to possess and/or use TV broadcast receiving equipment.

Turnover of TV broadcasters — Total revenue (operating incomes) from all services rendered by TV broadcasters. Operating incomes may comprise receipts from TV licence fees, public subsidies, TV advertising, TV sponsorship, teleshopping, subscription fees (pay-TV), receipts from exploitation of own TV programme copyrights and other operating incomes as income from concessions, patents, trademarks and similar value, etc.

Public TV programmes services: — TV programme service which have a public service obligation and which may be financed totally or partly financed by licence fees or by public subsidies.

Private TV programmes services: — TV programme service, which does not have a public service obligation. Private programme services are usually financed by advertising, sponsorship, subscription fee, pay-per view fee or receipts from teleshopping etc.

Daily TV viewing time: — Total amount of viewing time spent by a sample population of individuals of all age categories; expressed as an average daily amount of viewing in minutes.

Further information:

➢ Reference publications

Title Statistics on audiovisual services
Catalogue No KS-BT-02-001-EN-C Price EUR 17.5

➢ Databases

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