OBSERVATOIRE EUROPÉEN DE L'AUDIOVISUEL
EUROPEAN AUDIOVISUAL OBSERVATORY
EUROPÄISCHE AUDIOVISUELLE INFORMATIONSSTELLE

2014

YEARBOOK
ANNUAIRE
JAHRBUCH

PDF VERSION

Television, cinema, video and on-demand audiovisual services – the pan-European picture

Télévision, cinéma, vidéo et services audiovisuels à la demande – le paysage paneuropéen

Fernsehen, Film, Video und audiovisuelle Abrufdienste – die gesamteuropäische Lage

OBSERVATOIRE EUROPÉEN DE L'AUDIOVISUEL
EUROPEAN AUDIOVISUAL OBSERVATORY
EUROPÄISCHE AUDIOVISUELLE INFORMATIONSSTELLE

COUNCIL OF EUROPE
CONSEIL DE L'EUROPE

EUROPEAN AUDIOVISUAL OBSERVATORY, Yearbook 2014. Television, cinema, video and on-demand audiovisual services in Europe, 2014 Edition,
"Television, cinema, video and on-demand audiovisual services – the pan-European picture", European Audiovisual Observatory, Strasbourg, 2014.

OBSERVATOIRE EUROPÉEN DE L'AUDIOVISUEL, Annuaire 2014. Télévision, cinéma, vidéo et services audiovisuels à la demande en Europe, Edition 2014,
"Télévision, cinéma, vidéo et services audiovisuels à la demande – le paysage paneuropéen", Observatoire européen de l'audiovisuel, Strasbourg, 2014.

*EUROPÄISCHE AUDIOVISUELLE INFORMATIONSSTELLE, Jahrbuch 2014. Fernsehen, Film, Video und audiovisuelle Abrufdienste in Europa, 2014,
„Fernsehen, Film, Video und audiovisuelle Abrufdienste – die gesamteuropäische Lage", Europäische Audiovisuelle Informationsstelle, Straßburg, 2014.*

Director of publication Directeur de la publication ***Verlagsleitung***

Dr. Susanne Nikoltchev
Executive Director
Directrice exécutive
Geschäftsführende Direktorin

Editor Coordination scientifique ***Unter der wissenschaftlichen Leitung von***

Dr. André Lange (andre.lange@coe.int)
Head of the Department "Information on Markets and Financing"
Responsable du département "Information sur les marchés et les financements"
Leiter der Abteilung „Informationen über Märkte und Finanzierungen"

Analysts Analystes ***Analysten***

Christian Grece, Martin Kanzler, Deirdre Kevin, Dr. Agnes Schneeberger, Julio Talavera.

Special thanks to the following Remerciements particuliers à ***Besonderen Dank an***

BUREAU VAN DIJK ELECTRONIC PUBLISHING (Vincent Leray), EBU-M.I.S. (Dr. David Fernández Quijada, Dr. Florence Hartmann,
Dr. Roberto Suarez Candel), EPRA (Emmanuelle Machet), EURODATA-TV (Jacques Braun, Alexandre Callay, Aurore Lévêque, Aurélie Sykes-Darmon),
LYNGSAT (Christian Lyngemark and his network), SCREEN DIGEST (Maria Aguete, Guy Bisson, Richard Broughton, Helen Davies, Ben Keen),
WARC (Suzy Young).

Pedro Brauman (RTP, Portugal), Miguel Angel Fontan (Kantar Media, Spain), Rebecca Jacobi (IHS, United Kingdom), Eva Haries (NORDICOM, Sweden),
and all our correspondents within television companies.

EFARN (European Film Agency Research Network)
EPRA (European Platform of Regulatory Authorities)

Editorial Assistant and Yearbook Premium Service Assistante éditoriale et Service premium de l'Annuaire ***Verlagsassistentin und Jahrbuch Premium Service***

Valérie Haessig (valerie.haessig@coe.int, Tel. : +33 (0)3 90 21 60 11)

Translation Traduction ***Übersetzung***

France Courrèges, Michael Finn, Sonja Schmidt.

Documentation - Public Relations Documentation - Relations publiques ***Dokumentation - Öffentlichkeitsarbeit***

Alison Hindhaugh (alison.hindhaugh@coe.int, Tel. : +33 (0)3 90 21 60 10)

Marketing Promotion ***Marketing***

Markus Booms (markus.booms@coe.int, Tel. : +33 (0)3 90 21 60 06)

Publisher Editeur ***Verlag***

European Audiovisual Observatory
Observatoire européen de l'audiovisuel
Europäische Audiovisuelle Informationsstelle
76, allée de la Robertsau F-67000 STRASBOURG
http://www.obs.coe.int
Tél. : +33 (0)3 90 21 60 00
Fax : +33 (0)3 90 21 60 19

Exclusive distribution for Spain and Latin America
Distribution exclusive pour l'Espagne et l'Amérique latine
Exklusiver Vertrieb für Spanien und Lateinamerika

CINEinforme y TELEinforme
Ediciones Exportfilm, S.L.
Gran Vía 64
E-28013 MADRID - ESPAÑA
Tel. +34 (9)1 541 21 29 / (9)1 541 27 14
Fax +34 (9)1 559 81 10
http://www.cineytele.com

Layout Maquette ***Gestaltung***

Acom Europe, Paris

Printed in France Imprimé en France ***Gedruckt in Frankreich***

ISBN : 978-92-871-8018-6 (PDF VERSION)

Introduction

It is not without some emotion that I present to you the 20th edition of the European Audiovisual Observatory's Yearbook. In fact this edition is the last to be produced under my professional responsibility, but it is also the final print edition. From 2015, the Yearbook will be in a fully electronic format accessible online.

There are many reasons for this move to a purely electronic edition. We are anxious to continue to provide full information on the main branches of the audiovisual sector, using both a "country-by-country" and a pan-European approach, and to make that information available as early as possible. The new format we will be preparing will allow us to supply data more quickly and make it easier for readers to conduct searches, thus permitting them in a single operation to locate the information they seek, whether it be contained in a national or in a pan-European table. Summary briefs will enable readers who are in more of a hurry to access more easily an analysis of the major trends in the various sectors of the market.

I have no doubt that the future online version of the Yearbook will meet our organisation's objective, which is to be a valuable tool for improving the transparency of the audiovisual sector. At a time when the development of networks poses so many challenges not only for this sector but also the cultural and creative industries in general, it was inevitable that the Observatory should adapt more radically to the new circumstances regarding the dissemination of information.

Before this new Yearbook generation comes on stream it is worth emphasising two important innovations in the present edition:

- For the first time, readers will find in Chapter 1 an analysis of the international trade in audiovisual services based on an initial attempt to apply to the European Union the new methodology proposed by the WTO, by endeavouring to measure the operating revenues of the European affiliates of non-European companies.
- In Chapter 7, we provide for the first time an exclusive in-depth analysis of the catalogues of various VoD services. This analysis is, for purely technical reasons, admittedly limited to a small number of catalogues but it does provide some interesting insights into the origins of these catalogues and the use of the different fiction formats (cinema films, television films, series, and animation).

The production of the Yearbook is a genuine collective effort. As the last of these twenty editions is completed, it is clearly impossible for me to mention here everyone who has contributed to producing this publication down the years, but I

Introduction

Ce n'est pas sans émotion que je vous présente la 20ème édition de l'Annuaire de l'Observatoire européen de l'audiovisuel. En effet cette édition est la dernière établie sous ma responsabilité scientifique, mais c'est aussi la dernière qui prend la forme d'une édition imprimée. A partir de 2015, l'Annuaire se présentera en effet sous une forme complètement électronique, accessible en ligne.

Les raisons de ce passage à l'édition purement électronique sont multiples. Notre souci est de continuer à fournir une information complète sur les principales branches du secteur audiovisuel, dans une approche « pays par pays » mais aussi dans une approche paneuropéenne et de fournir cette information dans les meilleurs délais. La nouvelle formule que nous préparons permettra à la fois une livraison plus rapide ainsi que des modalités de recherche plus aisées, permettant au lecteur de trouver d'un seul mouvement l'information qu'il cherche, qu'elle se trouve dans un tableau national ou dans un tableau paneuropéen. Des notes de synthèse permettront également aux lecteurs plus pressés de bénéficier plus facilement d'un accès à l'analyse des grandes tendances des diverses branches du marché.

Je ne doute pas que la future version en ligne de l'Annuaire soit à la hauteur des ambitions de notre organisation : être un outil utile à l'amélioration de la transparence du secteur audiovisuel. A l'heure où le développement des réseaux pose tant de défis au secteur audiovisuel, et aux industries culturelles et créatives en général, il était inévitable que l'Observatoire s'adapte plus radicalement aux nouvelles conditions de la diffusion de l'information.

En attendant cette nouvelle génération de l'Annuaire, il n'est pas inutile de mettre l'accent sur deux innovations importantes de la présente édition :

- On trouvera pour la première fois dans le chapitre 1 une analyse du commerce international des services audiovisuels basée sur une première tentative d'appliquer à l'Union européenne la nouvelle méthodologie proposée par l'OMC, en essayant de mesurer les revenus d'exploitations des filiales européennes d'entreprises extra-européennes.
- Dans le chapitre 7, nous proposons pour la première fois une analyse exclusive et approfondie des catalogues de divers services de VoD. Cette analyse est certes limitée, pour des raisons purement techniques, à un nombre réduit de catalogues, mais elle fournit des enseignements intéressants sur l'origine de ces catalogues et l'usage des différents formats de fiction (films de cinéma, téléfilms, séries, animation).

Einführung

Diese 20. Ausgabe des Jahrbuchs der Europäischen Audiovisuellen Informationsstelle stelle ich Ihnen nicht ohne ein gewisses Maß an Sentimentalität vor. Dies ist die letzte Ausgabe unter meiner wissenschaftlichen Leitung, gleichzeitig aber auch die letzte Ausgabe, die in der bisherigen Form als gedruckte Fassung erscheint. Ab 2015 wird unser statistisches Jahrbuch nur noch in elektronischer Form veröffentlicht werden und online zugänglich sein.

Es gibt viele Gründe, warum wir uns für eine rein elektronische Ausgabe entschieden haben. Wir wollen natürlich auch in Zukunft möglichst vollständige Informationen über die wichtigsten Branchen des audiovisuellen Sektors liefern. Gleichzeitig aber sind wir bemüht, diese Informationen so rasch wie möglich zur Verfügung zu stellen. Das neue Format, an dem wir zurzeit arbeiten, wird uns nicht nur eine sehr viel schnellere Lieferung von Daten ermöglichen, es bietet auch bequeme Suchfunktionen. Für den eiligen Leser werden wir Zusammenfassungen veröffentlichen, damit er sich schneller einen Überblick über die wichtigsten Trends in den verschiedenen Branchen des Marktes verschaffen kann.

Ich bin sicher, dass auch die zukünftige Online-Ausgabe des Jahrbuchs dem Anspruch unserer Organisation gerecht werden wird: ein Instrument für mehr Transparenz im audiovisuellen Sektor zu sein. In einer Zeit, in der der rasche Ausbau der Netze den audiovisuellen Sektor und die Kultur- und Kreativwirtschaft vor zahlreiche Herausforderungen stellt, war es einfach unumgänglich, sich radikaler an die neuen Bedingungen für die Verbreitung von Informationen anzupassen.

Bis die erste Ausgabe der neuen Generation des Handbuchs erscheint, möchte ich Sie schon einmal auf zwei wichtige Neuerungen aufmerksam machen:

- Kapitel 1 enthält erstmals eine Analyse des internationalen Handels der audiovisuellen Dienste. Für diese Analyse haben wir die neue Methode, die von der WTO vorgeschlagen wurde, auf die Europäische Union angewandt, d.h., wir haben versucht, die Einnahmen der europäischen Tochtergesellschaften von außereuropäischen Unternehmen zu messen.
- Kapitel 7 enthält erstmals eine exklusive und eingehende Analyse der Kataloge von VoD-Anbietern. Aus technischen Gründen ist diese Analyse natürlich auf eine relativ kleine Zahl von Katalogen begrenzt, aber sie liefert trotzdem interessante Informationen über die Herkunft des Inhalts dieser Kataloge und über die unterschiedlichen Spielfilmformate, die von den VoD-Diensten angeboten werden (Kinofilme, Fernsehfilme, Serien, Animationsfilme).

Die Erstellung des Jahrbuchs ist ein echtes Gemeinschaftswerk. Nach diesen zwanzig Ausgaben ist es mir unmöglich, all die Personen aufzuführen, die would like to thank all the contributors, often anonymous, whatever the extent of their contribution. The Council of Europe Committee of Ministers, which drew up the Observatory's Statute, and the members of the Observatory's constituent bodies (the Executive Council, Financial Committee and Advisory Committee) have provided the institutional framework that is essential for such a project. The four Executive Directors of the Observatory with whom I have had the pleasure to work, the analysts, the department's assistant and the trainees whom I have had the honour to have under my wing, as well as the other colleagues in the team of the Observatory Secretariat, are all aware what the publication owes to them. I also wish to thank our national correspondents, the various companies and organisations that provide us with data at the pan-European level and their own networks of our national correspondents. The Yearbook is a complex production: some of our partners contribute to the substance of several chapters while a particular correspondent sometimes only supplies a single figure that enables us to complete the intricate statistical mosaic. Finally, I would also like to thank the translators for their meticulous work and professionalism, as well as the talented graphic artists who have enabled the Yearbook to transcend somewhat the dry nature of this particular genre.

It only remains for me to express the wish that the digital distribution of audiovisual works, the impact of which is growing all the time, does not constitute a major, or even permanent, obstacle to the transparency of the audiovisual sector. The most serious risk in the years to come is no doubt seeing a widening of the gap, including in the professional and institutional world of the audiovisual sector, between "rich data" – data so rich in information that the problem of "big data" becomes the main operational concern – and "poor data", with a refusal to provide the basic data essential for understanding market developments. With its task of improving the transparency of the audiovisual sector, the Observatory's focus is on reducing this gap, since the Yearbook remains a key tool in the accomplishment of this task.

André Lange

Head of the Department for Information on Markets and Financing

La réalisation de l'Annuaire est une véritable œuvre collective. Au terme de ces vingt éditions, il m'est évidemment impossible de citer ici tous ceux qui ont contribué au fil de ces années à la réalisation de cette publication, mais je tiens à remercier tous ses contributeurs, souvent anonymes, quelle que soit l'importance de leur contribution. Le Comité des Ministres du Conseil de l'Europe qui a établi les statuts de l'Observatoire ainsi que les membres des organes constitutifs de l'Observatoire (Conseil exécutif, Comité financier et Comité consultatif) ont fourni le cadre institutionnel indispensable pour un tel projet. Les quatre Directeurs exécutifs de l'Observatoire avec qui j'ai eu le plaisir de travailler, les analystes, l'assistante et les stagiaires du département que j'ai eu l'honneur de diriger ainsi que les autres collègues de l'équipe du Secrétariat de l'Observatoire savent tous ce que la publication leur doit. Je tiens également à remercier nos correspondants nationaux, les diverses entreprises et organisations qui nous fournissent des données à l'échelle paneuropéenne, ainsi que leurs propres réseaux de correspondants nationaux. L'Annuaire est une réalisation complexe : certains de nos partenaires contribuent à la substance de plusieurs chapitres, alors que tel ou tel correspondant ne nous fournit parfois qu'un seul chiffre permettant de compléter la délicate marqueterie statistique. Et enfin, je tiens également à remercier les traducteurs pour leur rigueur et leur professionnalisme ainsi que les talentueux graphistes qui ont permis à l'Annuaire d'échapper un peu à l'austérité du genre.

Il me reste à souhaiter que l'impact de plus en fort de la diffusion numérique des œuvres audiovisuelles ne constitue pas, quant à elle, un obstacle majeur, voire définitif, à la transparence du secteur audiovisuel. Le risque essentiel, pour les années à venir, est certainement de voir se creuser le fossé, y compris dans le monde professionnel et institutionnel de l'audiovisuel, entre les « rich data » – tellement riches en données que la problématique des « big data » devient leur principale préoccupation opérationnelle – et les « poor data », auxquels sont de plus en plus refusés des données de base, indispensables à la compréhension des évolutions du marché. Par sa mission d'amélioration de la transparence du secteur audiovisuel, l'Observatoire a vocation de travailler à réduire ce fossé. Puisse l'Annuaire rester un outil essentiel dans l'accomplissement de cette mission.

André Lange

Responsable du département « Information sur les marchés et les financements »

im Laufe der Jahre an der Realisierung dieser Publikation mitgewirkt haben. Aber ich möchte allen danken, die einen Beitrag geleistet haben, unabhängig davon, wie groß dieser war. Das Ministerkomitee des Europarats, der das Statut der Informationsstelle erstellt hat, und die Mitglieder der konstitutiven Organe der Informationsstelle (Exekutivrat, Finanzausschuss und Beratender Ausschuss) haben den institutionellen Rahmen zur Verfügung gestellt, ohne den ein solches Projekt gar nicht möglich wäre. Die vier geschäftsführenden Direktoren der Informationsstelle, mit denen ich das Vergnügen hatte, zusammenzuarbeiten, die Analysten, die Assistentin und die Praktikantinnen und Praktikanten der Abteilung, die ich die Ehre hatte, zu leiten, aber auch all die anderen Kolleginnen und Kollegen vom Sekretariat der Informationsstelle wissen, was diese Publikation ihnen schuldet. Danken möchte ich auch unseren nationalen Korrespondenten, den Unternehmen und Organisationen, die uns mit Daten auf gesamteuropäischer Ebene versorgen, aber auch ihren eigenen Netzen nationaler Korrespondenten. Das Jahrbuch ist ein komplexes Werk: Einige unserer Partner arbeiten an mehreren Kapiteln mit. Es kommt aber auch vor, dass ein Korrespondent nur eine einzige Zahl liefert, genau die Zahl, die wir brauchen, um unserer Statistik ein weiteres wichtiges Mosaiksteinchen hinzuzufügen. Und nicht zuletzt möchte ich den Übersetzerinnen und Übersetzern danken für ihre Sorgfalt und ihr professionelles Engagement, aber auch den talentierten Graphikern, denen wir zu verdanken haben, dass das Jahrbuch der Informationsstelle immer ein wenig anders ausgesehen hat als dies normalerweise bei so etwas Nüchternem wie einem statistischen Jahrbuch der Fall ist.

Mir bleibt nur noch zu wünschen, dass der immer größer werdende Einfluss des Internets auf die Verbreitung audiovisueller Werke nicht zu einer Gefahr für die Transparenz des audiovisuellen Sektors wird. In den kommenden Jahren wird es vor allem darum gehen, zu verhindern, dass die Kluft zwischen den „rich data", den „Datenreichen" – d.h. Einrichtungen oder Organisationen, die so reich an Daten sind, dass die Problematik der „big data" zu ihrem größten operationellen Problem wird – und den „poor data", den „Datenarmen", denen selbst die grundlegenden Daten, die für ein Verständnis der Marktentwicklung unverzichtbar sind, immer häufiger verweigert werden, nicht noch größer wird. Die Informationsstelle hat sich zur Aufgabe gemacht, die Transparenz des audiovisuellen Sektors zu verbessern und auch diese Kluft zu verringern. Ich wünsche mir daher, dass das Jahrbuch auch in Zukunft dieser Aufgabe gerecht wird.

Dr. André Lange

Leiter der Abteilung „Informationen über Märkte und Finanzierungen"

Contents

Sommaire

Inhalt

CHAPTER
CHAPITRE
KAPITEL
1

The world audiovisual market

Le marché audiovisuel mondial

Audiovisuelle Märkte weltweit

1
2
3
4
5
6
7
8

T.1.1 Main "convergent players" in Europe 2013-2014

Ranked by global operating revenues 2013 in EUR million.

Rank	Company	Country	2012	2013	Fixed telephony services	Mobile telephony	Internet Service Provision	Audiovisual services distribution (cable, satellite, IPTV, DTT, connected TV)
1	Samsung Electronics	KR	142 510	156 223		Manufacturer (Galaxy S)		Hybrid set-top boxes (agreement with UPC/Liberty Global)
2	Apple Inc.	US	121 251	126 370		Manufacturer. Alliances with major European operators for the commercialisation of iPhone and iPad, application store		
3	Tesco	GB	75 012	85 650				
4	Telefonica	ES	64 679	65 132	Movistar (ES), O2 (DE, CZ, SK)	Movistar (ES), O2 Mobil (CZ, DE, IE, SK, GB), Movistar One (South America), Vivo (BR), E-Plus (DE)	Telefonica (ES), O2 (CZ, GB, SK, DE), Terra Networks (ES, US, South America)	Imagenio (IPTV: ES), O2 TV (IPTV: DE, CZ), DTS (SAT: ES; 22%) Movistar Fusion TV (ES); ZON Multimedia (SAT/CATV: PT, 5.4%) collaboration with Multichoice (Africa)
5	Deutsche Telekom	DE	61 137	61 458	T-Com (DE, HR, HU, SK), T-Systems (CZ), Makedonski Telecom (MK), Crnogorski Telekom (ME), Hellenic Telecom (OTE) (40%)	T-Mobile (AT, CZ, DE, GB, HR, ME, MK, NL, PL, SK, US), 50% of EE (GB) T-Systems (CZ), Polska Telefonia Cyfrowa (PL), Cosmote (RO), Hellenic Telecom (OTE) (40%), Cosmote (GR), Albanian Mobile Communications (AMC) (97.21%)	T-Online (DE, AT, HU), T-Systems (CZ), HT (HR), Makedonski Telcom (MK), Hellenic Telecom (OTE) (40%), Novatel EOOD (BG)	T-Entertain (IPTV: DE), Entertain-Sat TV (SAT: DE); T-Home (CATV & IPTV: HU), Magio TV (CATV & IPTV: SK), Via TV (IPTV: CZ), T-Home Sat (SAT: CZ), Max TV (IPTV: HR, MK), Extra TV (ME), Sat-TV (SAT: HU), OTE TV (SAT/IPTV: GR, 40%), T-Mobile (DTT: NL)
6	Microsoft Corp.	US	58 612	60 721		Purchase of Nokia's mobile phone unit (Sept. 2013)		Windows Media center
7	Amazon.com Inc.	US	46 220	58 072		Fire Phone (US) - Agreement with ATT		
8	Sony	JP	56 282	54 921		Sony Ericsson (manufacturer) (100% since October 2011)		Sony Internet TV
9	Panasonic	JP	60 438	54 704		Manufacturer		
10	Comcast Corporation	US	47 337	50 338		Xfinity Voice (US)	Xfinity Internet (US)	Xfinity TV (CATV: US)
11	Google Inc.	US	37 960	46 662		Smartphone Nexus		YouTube as a distribution platform for branded channels, VoD services,... Google TV (US)
12	Vodafone Group PLC	GB	60 688	46 286	OF Fjarskipti (IS)	Vodafone (AL, AT, CZ, DE, ES, GB, GR, HU, IE, IT, MT, NL, PT, RO, TR), OF Fjarskipti (IS),	OF Fjarskipti (IS)	OF Fjarskipti (IPTV: IS), Casa TV (PT) Vodafone (IPTV: DE), Kabel Deutschland (CATV: DE , ONO: ES)

Audiovisual services distribution to mobile (smartphone, videogame consoles, tablets)	App Stores / Connected TV Stores	Social networks / Videosharing platforms	TV and NVoD services	On-demand audiovisual services, music online	Production and distribution of films and TV programmes	Other main assets / activities
	Smart TV Store			3D VoD services (US, AU, SG, ES,...) + Samsung Smart Hubs		EGP manufacturer, Visual display, IT Solutions, Semiconducteurs
iTunes Stores (including Apps providing access to live TV channels)	iTunes Stores	Ping (closed 30.9.2012)		iTunes Store accessible in 155 countries	Cross shareholding Apple and Walt Disney by executives of the two groups	Hardware and software; online distribution of third-party content (iTunes), iPhone, iPod, iPad, Apple TV box.
				Blinkbox, Clubcard TV		Retailer, online shopping
Mobistar (ES), collaboration with Microsoft Xbox 360 (ES)		Tuenti (91.4 %)	22% Sogecable; O2 Info CZ	Imagenio Videoclub, Pixbox, Movistar Videoclub, Videoteka, Terra TV video (ES), O2 Videotéka (CZ), Terra TV	Grupo Telefonica de contenidos	O2 Music Download service (in association with MTV)
T-Mobile (DE, NL, GB, HU, CZ, AT), Polska Telefonia Cyfrowa (PL)			Entertain Infokanal (DE), Magio Infokanal (SK), OTE Cinema & Sport channels (GR, 40 %), Max-TV (HR), Ozone TV (HU), Kostnix (AT), Life Network TV & Ozone Network TV (HU)	19 services (DE, CZ, HR, HU, MK, GB, SK, GR)		Agreements with Apple, AndroidMarket, NokiaStore
TV on Xbox 360 (20 countries, including US, CA, GB, ES, DE, IT, FR) + TV on Xbox One ; Xbox Live (AT, BE, CH, DE, DK, ES, FR, FI, GB, IE, IT, NL, NO, SE)	Windows Store / Xbox market place	Socl		MSN Video		IT software publishing (including Microsoft TV), video games, MSN portals, search tool Bing (including Bing Video)
Kindle Fire 8 HD as platform of access to VoD services	Kindlestore	Public Notes on Kindle		AmazonVod (US), Amazon Instant Video (US) & Amazon Instant Video (GB, DE)		Retail online; Kindle; Whyspersinc (Kindle store)
PSP as platform to access VoD services in 17 European countries	Sony Internet TV (integrating Google TV)	Play Community	66 channels in Europe (AXN, AXN Sci-fi, AXN Crime, Animax, MGM Channel, SPTI)	Vidzone (VoD services in 15 European countries), Crackle (Worldwide free VoD streaming service), Co-owner of VEVO	Sony Pictures, distribution of film and TV programmes (theatrical, TV, home video, VoD)	Production of EGP products, Digital cinema integrator
	Viera Connect Apps	Social Networking TV (agreement with Facebook and Twitter)				Consumers products, business products and industrial solutions
		Tunerfish	NBC channels and PPV events (US) ; 126 TV channels in Europe (CNBC Europe, Hallmark, KidsCo, SciFi, Universal, ...)	Xfinity TV (US); catch-up services of channels; Providing programmes to main VoD operators, Co-owner of Hulu (US)	NBC Universal Studio, distribution of TV programmes	
YouTube as a distribution platform for branded channels, VoD services,... Google TV (US)	Google Play	YouTube, Google+		YouTube Movies (US, DE, FR, GB); Google Play Movie (US, DE, ES, FR, GB, RU)		Online advertising, Search Tool; Google Video; Android Operating system,…
Mobile TV (GB, HU, NL, PT, TR) Vodafone Live (RO), Vodafone Sky TV (GB, IT), Vodafone Digital+ (IS)		Vodafone 555 Blue (in collaboration with Facebook)	Chilli TV (HU, PT), Blue TV (HU), Redx Club (DE)	Videothek (DE), Videoclube (PT), Select Video (DE)		

T.1.1

Main "convergent players" in Europe 2013-2014

Ranked by global operating revenues 2013 in EUR million.

continued

Rank	Company	Country	2012	2013	Fixed telephony services	Mobile telephony	Internet Service Provision	Audiovisual services distribution (cable, satellite, IPTV, DTT, connected TV)
13	Toshiba	**JP**	45 162	45 978				
14	Orange S.A.	**FR**	44 415	41 668	Orange (CH, FR, ES, PL)	Orange (AT, CH, ES, FR, GB, LU, PL, RO), Mobistar (BE), 50% of EE (GB)	Orange (CH, FR, ES, PL, SK)	Mobistar Starpack (BE), Orange TV (IPTV: CH, ES) La TV d'Orange (FR), Videostrada TV (PL), Orange Polska (PL), Fiber TV (SK), Sat TV (SK), Sat-TV La TV Orange (IPTV, SAT: FR)
15	LG Electronics	**KR**	39 062	39 716		Manufacturer		
16	Hutchinson Whampoa Ltd	**HK**	38 853	38 669		3 (GB, AT, DK, IE, IT, SE…)		3Mediabox (DE, AT)
17	Walt Disney Inc.	**US**	32 754	35 132				
18	Bouygues	**FR**	33 547	33 345	Bbox (FR)	Bouygues Telecom (FR)	Bbox (FR)	Bbox (IPTV: FR)
19	Telecom Italia	**IT**	29 503	27 150	Alice (IT)	TIM (IT)	Alice ADSL (IT), BBned (NL)	Cubovision (IT), DTT package (3)
20	Sistema	**RU**	25 952	26 595	Comstar UTS	MTS	Comstar	MTS (CATV: RU) ; Multiregion (CATV: RU); TVT (CATV: RU) Stream TV Service (IPTV: RU)
21	Vivendi	**FR**	28 994	22 135	Vivendi completed the sale of SFR to Numericable/ Altice in November 2014. Vivendi also sold Maroc Telecom in 2014.			DTH: Canalsat, Canalsat Suisse, TNT Sat; DTT: Canal+/ Canalsat 3 étoiles; Media Overseas (DTH)
22	BT Group PLC	**GB**	22 019	22 122	BT Together	BT Mobile	BT Broadband	BT Vision (IPTV), partner in YouView
23	Time-Warner Inc.	**US**	21 735	21 641				

Audiovisual services distribution to mobile (smart-phone, videogame consoles, tablets)	App Stores / Connected TV Stores	Social networks / Videosharing platforms	TV and NVoD services	On-demand audiovisual services, music online	Production and distribution of films and TV programmes	Other main assets / activities
	Toshiba AppsConnect					EGP and satellite dish manufacture
TV Max/ TV d'Orange (FR), Live TV (CH, RO), Orange TV Movil (ES), Mobistar Mobile TV (BE), Orange Mobile TV (LU), Strefy TV (PL), TV de la Orange APP (PL), collaboration with Microsoft Xbox 360		Dailymotion, Plazza	France: 6 channels, ES: 3, PL: 3, partnership with Canal+	Orange 24/24 (FR), Videoparty (FR), VoD services on DailyMotion, Film to go (GB), Mobistar (BE), Orange Replay (CH), Orange Vod (PL)	Studio 37 (film production, FR)	GlobeCast (teleport), Agreement with Apple
	LG Smart TV Home Dashboard					EGP manufactuer, Electrodomestics
3 Mobile TV (AT, DK, IE, SE), La3 TV (IT)			AT: 3Live; IT: LA 3, LA3Cinema.			Hutchison 3G (Music).
		Togetherville (closed April 2012)	108 channels in Europe (Disney Channel, Disney Junior, XD, Toon Disney, ESPN, ABC,…).	Providing programmes to main VoD operators. Various catch-up TV services. Co-owner of Hulu (US), Disney avantpremiere (FR, GB)	Walt Disney, Pixar, Distribution of film and TV programmes (theatrical, TV, home video, VoD), Maker Studios	Publishing activities, leisure parks
b.TV (FR)		Wat.tv	EUR : Eurosport (3 services) ; FR : TF1 (43%), LCI, TV Breizh, Histoire, TF6, TFOU, Ushuaia TV, Jet, Acquisition TMC and NT1 in 2009	TF1 Vision (MyTF1 VoD, catch-up TV)	TF1 Films production; TF1 Productions, TF1 Droits audiovisuels, TF1 Publicité production	Construction industry; TF1 Video; partnership with Apple, Metro France (free daily)
Cubovision Mobile App		Yalp, Virgilio Community	MTV Italia (4 channels). La7 sold to Cairo Editore in April 2013	Cubovision web TV (IT), MTV Music (IT), Cubovision su Facebook (IT)		APCOM (News Agency), Telecom Italia Broadcasting (analogue and digital networks), Virgilio (portail Internet).
MTS Mobile TV				Povtor TV (RU), Stream VoD (RU)	TV programming and movies	Advertising (Maxima advertising agency, TV-Project), print distribution (Nasha Pressa), newspaper publishing (Literaturnaya Gazeta, Metro, Rossiya), and multimedia (Sistema Multimedia), consumer electronics, banking, retailing, real estate, …
Pass TV Mobile/ Pass Canalsat Mobile/ Pass Canal+ Mobile		Starbright World	Groupe Canal+ and thematic channels (FR) (55 channels, including NVoD services Cine+), Canal+ Cyfrowy (PL: 14 channels) ; i>Tele, Planete (IT), 16 % Sogecable (ES).	Canalplay (FR), Canal+ à la demande (FR), Canalsat à la demande (FR) Cineplay (FR), Co-owner of VEVO, Watchever (DE)	Studiocanal, Nulle part ailleurs, 60% Studio Bagel	Universal Music; Stake in NBC Universal (20%) sold to General Electrics in January 2011
			BT Sport 1 and 2 (and HD versions); ESPN UK	Vision TV (music, films, movies, kids/sports,...)		
		Flixter	>240 channels in Europe (Boomerang, Cartoon Network, Cinemax, CNN, TCM, HBO,…).	Providing programmes to main VoD operators. Warner Collection (US, FR), HBO On Demand (Eastern Europe), branded catalogues on iTunes Stores	Warner Bros., distribution of film and TV programmes (theatrical, TV, home video, VoD), publishing activities.	

T.1.1

Main "convergent players" in Europe
2013-2014

Ranked by global operating revenues 2013 in EUR million.

continued

Rank	Company	Country	2012	2013	Fixed telephony services	Mobile telephony	Internet Service Provision	Audiovisual services distribution (cable, satellite, IPTV, DTT, connected TV)
24	21th Century Fox	US	19 916	21 267		Telephony services by BSkyB (GB) and Sky Italia (IT)	Sky Broadband (GB)	Sky Digital (DTH: GB, IE); Sky Italia (DTH: IT); Sky Deutschland (DTH: AT, DE) Direct TV (DTH: US); Foxtel (DTH: AU); Tata Sky (Asia), STAR (Asia)
25	Bertelsmann AG	DE	16 786	17 213				
26	Vimpelcom	NL	17 476	16 376	Beeline (RU), Kyivstar (UA), Infostrada (IT)	Beeline (RU), Kyivstar (UA), Wind (IT), Djezzy (DZ), Mobilink (PK), Banglalink (BD), Telecel (CF), LeoTM (BI)	Beeline (RU), Kyivstar (UA), Infostrada (IT), Djezzy (DZ)	Beeline TV (IPTV: RU), Kyivstar (IPTV: UA)
27	Nokia	FI	30 176	12 709		Mobile phone unit sold to Microsoft in September 2013		
28	Telenor ASA	NO	13 839	12 340	Telenor (NO)	Telenor (12 countries)	Online (NO), Glocalnet (SE)	Canal Digital (CATV, DTH: DK, FI, NO, SE); IPTV: Bredband, Digital-TV (SE); DTT: Riks TV (NO)
29	Teliasonera AB	SE	13 956	11 527	Telia (SE), Sonera (FI), Lattelecom (LV), TEO (LT), Telia Stofa (DK)	Telia MobilT (SE), Halebop (SE), Netcom (NO), Telia (DK), EMT (EE), LMT (LV), Omnitel (LT), Megafon (RU), Azercell (AZ), Geocell (GE), Kcell (KZ); Moldcell (MD), Yoygo (ES),…	Telia Bredband (SE), Sonera (FI), Nexgentel (NO), Telia Stofa (DK), Elion (EE), Lattelecom (LV), TEO (LT), Yoygo (ES), Geocell (GE)	IPTV: Telia TV (DK, SE), Next TV (NO), Elion TV (EE), Gala TV (LT), Interaktiva TV (LV), Koti TV (FI). DTT: Gala Digital (LT). CATV: Stofa (DK), Sonera (FI)
30	Liberty Global plc	GB	7 815	10 513	UPC Broadband (AT, CZ, HU, IE, NL, NO, PL, SI, SK), Telenet (BE), Cablecom (CH)		UPC Broadband (AT, CZ, HU, IE, NL, NO, PL, SI, SK), Telenet (BE), Cablecom (CH)	CATV (AT, CH, CZ, BE, DE, HU, IE, NL, NO, PL, RO, SK), and DTH satellite (CZ, HU, RO, SK) , Virgin Media cable (GB), Zesko cable (NL)
31	Viacom	US	10 798	10 199				
32	Swisscom AG	CH	9 721	9 327	Swisscom (CH)	Swisscom Mobile (CH)	Swisscom Flixnet (CH), Fastweb (IT)	Swisscom TV (IPTV, CH)
33	Dixon Retail	GB	10 082	8 766				

Audiovisual services distribution to mobile (smart-phone, videogame consoles, tablets)	App Stores / Connected TV Stores	Social networks / Videosharing platforms	TV and NVoD services	On-demand audiovisual services, music online	Production and distribution of films and TV programmes	Other main assets / activities
Sky Go			427 channels in Europe: including BSkyB (GB, IE) and NVoD services Sky Box Office; Sky Deutschland (DE, AT) and NVoD Sky Select; Sky Italia (IT); Fox International; US and Australia TV channels + cable networks; International: NGC (52%).	Sky Go on Demand (GB, DE, IT), SkyPlayer (GB) ; purchase of Acetrax VoD service by BSkyB in May 2012	20th Century Fox, Shine Ltd	The publishing activities continue to be operated by News Corp.
		Clipfish	RTL Group: 130 TV channels and 31 radio stations in 11 countries.	Various VoD and catch-up TV channels operated by the RTL Group companies	FremantleMedia, FremantleMedia North America (USA), Talkback Thames (GB), UFA Film & TV Produktion (DE), Grundy Television (AU), CLT-UFA International (LU), M6 Films (FR)	Arvato (AV facilities), print and music publishing, Direct Group (retail).
Beeline Videoportal (RU), Kyivstar (UA), Beeline Mobile TV (RU), Djuice (UA)				Beeline Videoprokat (RU), Infostrada TV (IT)		
	OVI Store	Nokia Pulse application		OVI Store		OVI Music
Telenor Mobil TV (DK, NO)			Co-owner of C MORE (113 channels in Nordic countries: C MORE, Canal 9, Canal 8 Sport); NVoD service Kioskfilm	C:More VoD services		Terrestrial transmission (Norkring, NO, BE), satellite operator (Telenor Satellite Broadcasting); agreement with Google for Android Market ecosystem; 31% of Vimpelcom Ltd shares.
Mobile TV (EE), Omnitel Mobili TV (LT), Mobila TV (LV, SE) Netcom (NO), (SE)		Galaxy (KZ)	Telia Nöjeskanalen (SE), Zaptor TV (DK)	Telia Nöje Video on Demand (NO), Telia Videobutik (SE), Stofanetbio (DK), Stofa Digital Filmpakker (DK), Elion VoD (EE)		Musiikkilataamo (FI); alliance with Spotify
	Horizon TV		Chellomedia was sold to AMC Networks in 2013. Only remaining channels: Telenet (13 channels), and various UPC info channels.	UPC On demand (AT, NL), Telenet à la carte (BE), Kino auf Abruf (DE), Horizon TV (NL)	Purchase of All3 Media Group in joint-venture (50-50%) with Discovery Communications Inc. In September 2014	
		Artist.MTV	120 channels in Europe (MTV, Nickelodeon, Comedy, Viva, Paramount, Channel 5)	Providing programmes to main VoD operators. Own VoD service in US	Paramount Pictures, sales of TV programmes, home video distribution	
Swisscom TV Air (CH)				Teleclub on demand (CH)	CT Cinetrade	TV Replay (Music), Swisscom Broadcast (terrestrial trans-mission), Billag (licence fee collection in CH)
				Knowhow Movies		Specialised retailing

T.1.1 Main "convergent players" in Europe 2013-2014

Ranked by global operating revenues 2013 in EUR million.

continued

Rank	Company	Country	2012	2013	Fixed telephony services	Mobile telephony	Internet Service Provision	Audiovisual services distribution (cable, satellite, IPTV, DTT, connected TV)
34	KPN	**NL**	12 708	8 472	KPN (NL)	KPN Mobiel (NL), E-Plus (DE) sold to Telefonica in 2014	Internet van KPN (NL), Base (BE)	Interactieve TV (IPTV: NL), Digitenne (DTT); Snow (IPTV: BE)
35	Rostelecom	**RU**	5 152	7 060	Rostelecom (long distance)	Rostelecom, NSS, Baikalvestkom, Yeniseikom, SkyLink, Volgograd GSM, Akos	Rostelecom	Rostelecom (cable, IPTV)
36	Belgacom	**BE**	6 462	6 318	Belgacom (BE), Tango (LU)	Proximus (BE), Tango (LU)	Belgacom (BE), Tango (LU)	Belgacom TV (IPTV: BE), Scarlet TV (IPTV: BE), Tango (LU)
37	ARD	**DE**	6 115	6 201				
38	BBC Group	**GB**	6 046	6 172				Freeview (DTT: GB); Freesat (DTH: GB, IE) ; YouView
39	Fininvest	**IT**	5 154	5 016				Mediaset Premium (DTT), Tivusat (DTH), DTS/ Canal+ (ES)
40	Nintendo	**JP**	5258	4 043				

Audiovisual services distribution to mobile (smart-phone, videogame consoles, tablets)	App Stores / Connected TV Stores	Social networks / Videosharing platforms	TV and NVoD services	On-demand audiovisual services, music on line	Production and distribution of films and TV programmes	Other main assets / activities
Mobiel TV (NL), Base (BE)			Interaktive TV (NL)	VoD services on KPN and Snow		KPN Broadcast services
				Rostelecom Video Rental, Zabava		11 land stations for satellite TV
Belgacom Mobile (Proximus) ; Belgacom TV partout (BE)			Skynet iMotion Activities (11 channels).	Belgacom TV à la demande (2 linguistic versions); Movie Me App, Tango VoD	Involvement in film co-production	
			20 TV channels (Eins, regional channels, thematic channels, various versions of Deutsche Welle), radio stations.	ARD-Mediathek, hbbtv	Bavaria, Studio Hamburg, distribution of TV programmes	
			64 TV channels (plus windows), radio stations, 50% share in UK TV channels.	BBC iPlayer, BBC iPlayer Global	BBC Production, BBC Films	Sales of TV programmes, publishing, merchandising.
			39% of Mediaset (RTI, 41.5% of Mediaset España), Mediolanum Channel) - 91 TV channels	Around 25 services: IT Infinity , Mediaset, Premium on Demand, Gallery, catch-up services of the various channels of the group, TG.com.; ES: Telecinco.es, Yomvi,…	Medusa, Tao Due, Endemol (in association with Cyrte).	Elettronica industriale (terrestrial transmission), Mondadori, AC Milan, Mediolanum, Teatro Manzoni, retail online, record publishing
Distribution of Amazon and Netflix VoD services through Wii U (DE, GB, NL)						Videogames

➥ European Audiovisual Observatory

T.1.2 The worldwide 50 leading audiovisual companies by audiovisual turnover 2009-2013

Includes activities in broadcasting, audiovisual on-demand services, film and TV production, distribution, exhibition, home video, recorded music, videogames and retail of audiovisual products.

Segments other than audiovisual (such as print publications, consumers' electronics, cable networks, facilities) are not included.

Data not available for some large companies in Asia, Australia and Middle East.

USD million.

Rank	Company	Country	Activities	2009	2010	2011	2012	2013	*2013/12*
1	DirecTV	**US**	TV	21 565	24 102	27 226	29 740	31 754	***6.8%***
2	Walt Disney	**US**	PROD. DIS. TV. VID. REC	25 482	27 302	29 096	29 358	30 954	***5.4%***
3	Twenty First Century Fox Inc.	**US**	PROD. DIS. TV. VID	–	–	24 232	25 051	27 675	***10.5%***
p.m.	News Corporation [1]	**US**	PROD. DIS. TV. VID	22 699	23 475	24 840	–	–	**–**
4	Time Warner	**US**	PROD. DIS. TV. VID	22 019	23 839	25 928	26 222	27 185	***3.7%***
5	Sony	**JP**	PROD. DIS. VG	22 178	22 315	22 555	19 872	22 488	***13.2%***
p.m.	Maltby Capital Ltd / EMI Ltd [2]	**GB**	REC	2 501	2 487	~	~	–	**–**
6	Comcast Corporation [3]	**US**	TV	–	–	16 596	19 929	19 670	***-1.3%***
p.m.	NBC Universal	**US**	TV. PROD. DIS	14 953	16 598	18 050	–	–	**–**
7	Microsoft (Devices and Consumers - Licensing [4]	**US**	VG. VoD. IT software	~	~	19 945	19 021	18 803	***-1.1%***
p.m.	Microsoft (Entertainment and Devices Division)	**US**	VG. IPTV software	6 188	8 913	9 599	10 165	~	**~**
8	Apple Inc. (iTunes. software and services) [5]	**US**	MUS. VoD	4 036	4 948	9 373	12 890	16 051	***24.5%***
9	Dish DBS Corporation	**US**	TV. RET	11 663	12 641	14 048	13 152	13 695	***4.1%***
p.m.	Blockbuster Inc. [6]	**US**	VID (retail)	4 062	3 241	–	–	–	**–**
10	Viacom [7]	**US**	TV. PROD. DIS	13 619	13 356	14 914	13 887	13 794	***-0.7%***
11	CBS Corp.	**US**	TV. RAD	10 684	11 648	11 767	12 240	13 410	***9.6%***
12	Amazon Inc. *(estimates of audiovisal media sales)*	**US**	Retail (Music. VID. VG)	7 664	8 933	10 667	11 965	13 030	***8.9%***
13	Vivendi Universal [8]	**FR**	PROD. DIS. TV. VG	17 133	16 552	16 546	17 609	10 371	***-41.1%***
14	Gamestop Corporation	**US**	VG (retail)	9 078	9 474	9 550	8 887	9 040	***1.7%***
15	Liberty Interactive Corp. [9]	**US**	TV	10 158	10 982	8 268	8 516	8 623	***1.3%***
16	ARD	**DE**	TV. RAD	8 806	8 295	8 091	8 080	8 552	***5.8%***
17	BBC (Group)	**GB**	TV. RAD. PROD. DIS. VID	7 257	8 035	8 005	8 131	8 428	***3.7%***
18	Bertelsmann	**DE**	TV. PROD. DIS	7 287	7 409	7 528	7 932	8 107	***2.2%***
19	NHK	**JP**	TV. RAD	7 179	8 207	5 505	5 356	6 301	***17.6%***
20	Fuji Media Holdings Inc.	**JP**	TV. PROD. Others	6 298	7 108	7 120	6 706	6 235	***-7.0%***
21	Globo - Comunicaçao e Participaçoes S.A.	**BR**	TV. PROD	4 794	~	5 892	5 096	6 147	***20.6%***
22	France Télévisions	**FR**	TV	5 852	5 662	5 542	5 697	5 720	***2.8%***
23	Google Inc. *(estimates of YouTube revenues)* [10]	**US**	Open platform	500	1 000	2 000	3 700	5 600	***51.4%***
24	Nintendo	**JP**	VG	15 474	12 240	7 871	6 742	5 560	***-17.5%***
25	Discovery Communications Inc.	**US**	TV	3 387	3 706	4 168	4 487	5 535	***23.4%***
26	Grupo Televisa	**MX**	TV. RAD. CIN. others	4 010	4 691	4 495	5 315	5 400	***1.6%***
27	Mediaset	**IT**	TV. PROD. DIS	5 594	5 877	5 631	5 019	4 701	***-6.3%***
28	Activision Blizzard [8]	**US**	VG	–	–	4 755	4 856	4 583	***-5.6%***
29	Netflix	**US**	VoD. retail	1 670	2 162	3 204	3 609	4 374	***21.2%***
30	ITV PLC	**GB**	TV	3 043	3 230	3 309	3 465	3 939	***13.7%***
31	RAI	**IT**	TV. RAD. PROD. DIS	4 621	4 062	4 051	3 683	3 864	***4.9%***
32	Sirius XM Radio	**US**	RAD	2 473	2 817	3 015	3 402	3 799	***11.7%***
33	ProSiebenSat.1 Media AG	**DE**	TV. RAD. PROD. VoD	4 030	4 025	3 568	3 924	3 586	***-8.6%***
34	Electronic Arts	**US**	VG	3 654	3 589	4 143	3 797	3 575	***-5.8%***
35	Tokyo Broadcasting System	**JP**	TV. PROD. DIS	4 016	4 136	4 212	3 738	3 446	***-7.8%***
36	HSN Inc.	**US**	TV	2 750	2 997	3 069	3 267	3 404	***4.2%***
37	Nippon Television Network	**JP**	TV	3 203	3 595	3 582	3 421	3 323	***-2.9%***
38	Naspers	**ZA**	TV	2 254	2 582	3 132	3 273	3 247	***-0.8%***

T.1.2

continued

The worldwide 50 leading audiovisual companies by audiovisual turnover

2009-2013

Includes activities in broadcasting, audiovisual on-demand services, film and TV production, distribution, exhibition, home video, recorded music, videogames and retail of audiovisual products.

Segments other than audiovisual (such as print publications, consumers' electronics, cable networks, facilities) are not included.

Data not available for some large companies in Asia, Australia and Middle East.

USD million.

Rank	Company	Country	Activities	2009	2010	2011	2012	2013	*2013/12*
39	CC Media Holding Inc.	**US**	RAD	2 736	2 898	2 986	3 085	3 132	***1.5%***
40	TF1	**FR**	TV. PROD. DIS	3 564	3 745	3 391	3 463	3 008	***-13.1%***
41	ZDF	**DE**	TV	2 975	2 627	2 580	2 592	2 893	***11.6%***
42	Warner Music Group	**US**	REC	3 205	2 899	2 311	2 780	2 871	***3.3%***
43	Cinemark Inc.	**US**	EXH	1 977	2 141	2 280	2 474	2 683	***8.5%***
44	Lions Gate Entertainment Corp.	**CA**	TV. PROD. DIS	1 589	1 583	1 588	2 708	2 630	***-2.9%***
45	TV Asahi Corporation	**JP**	TV. MUS. VID	2 483	2 831	2 894	2 545	2 606	***2.4%***
46	Scripps Networks	**US**	TV	1 367	1 883	2 072	2 307	2 531	***9.7%***
47	Univision Communications Inc *est.*	**US**	TV. RAD. REC	1 973	2 100	2 200	2 300	2 444	***6.3%***
48	Modern Times Group MTG AB	**SE**	TV. RAD	1 993	1 954	1 956	2 050	2 180	***6.3%***
49	Regal Entertainment Group	**US**	EXH	1 992	1 956	1 843	1 925	2 060	***7.0%***
50	AMC Entertainment Inc.	**US**	EXH	1 771	1 759	1 773	1 890	1 962	***3.8%***

1. Turnover as at 30 June of year + 1.
2. Maltby Capital Ltd, a company owned by funds managed by Terra Firma, acquired EMI PLC on 17/08/2007. EMI was de-listed from London Stock exchange on 18/09/2007. On 04/10/2007 EMI ceased to be a public limited company and became EMI Group Ltd. The company was taken over in February 2011 by Citygroup. In November 2011, it was announced that EMI's recorded-music unit will be sold to Vivendi SA's Universal Music Group for USD 1.9 billion. A group spearheaded by Sony Corp.'s music division is to buy the publishing operation for USD 2.2 billions, according to a statement from the company. The takeover was authorised by the European Commission in September 2012 on the conditions that some labels to be sold.
3. On 28/01/2011, Comcast Corporation closed its transaction with General Electric Company to form a new company named NBCUniversal, LLC. Comcast now controls and owns 51% of NBCUniversal Holdings and GE owns the remaining 49%. As part of the Joint Venture Transaction, NBC Universal, Inc. was converted into a limited liability company named NBCUniversal Media, LLC ("NBCUniversal"), which is a wholly owned subsidiary of NBCUniversal Holdings. Comcast contributed to NBCUniversal its national cable networks, its regional sports and news networks, some of its Internet businesses and other related assets (the "Comcast Content Business"). We exclude theme park revenues from data on audiovisual revenues.
4. Microsoft's divisions were restructurated during fiscal year 2013-2014. The devices and consoles - Licensing activities include videogames, Xbox LIVE services but also the sales of other consumer software.
5. Includes mainly the revenues of iTunes Store. Change of definition from 2011.
6. Bankruptcy in 2010. The company was acquired in April 2011 by Dish DBS Corporation.
7. Data for 2010 are for 4 quarters calculated as at 31/09.
8. On 25/07/2013 Activision Blizzard announced the purchase of 429 million shares from owner Vivendi for $5.83 billion, dropping the shareholder from a 63% stake to just 12% by the end of the deal in September.
9. On 23/09/2011, Liberty Media Corporation completed a split-off of its wholly owned subsidiary, Liberty Interactive Corporation (formerly known as Liberty CapStarz, Inc.). Main audiovisual assets of Liberty Interactive Corp. are the QVC channels (US, Japan, Germany, UK, Italy).
10. Estimates by e-Marketers for 2011-2013 ; OBS estimates for 2009-2010.

➥ European Audiovisual Observatory

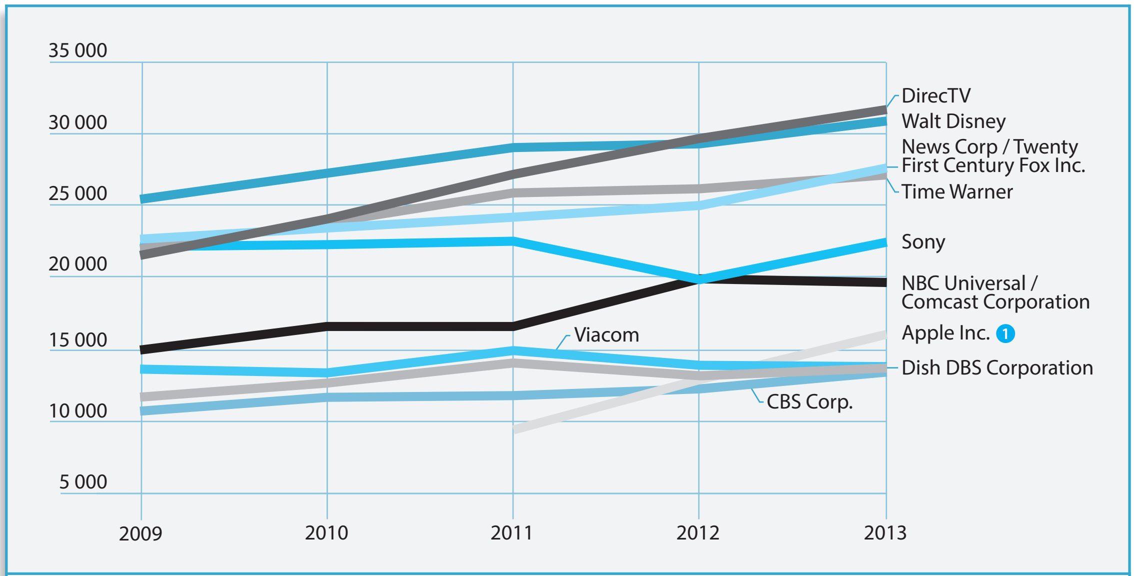
G.1.1 The audiovisual turnover of the 10 leading audiovisual companies worldwide

2009-2013

Includes activities in broadcasting, audiovisual on-demand services, film and TV production, distribution, exhibition, home video, recorded music, videogames and retail of audiovisual products. Segments other than audiovisual (such as print publications, consumers' electronic, cable networks, facilities) are not included.

Data not available for some large companies in Asia, Australia and Middle East.

USD million.



2009-2013 USD million.

1 iTunes, software and services.

➡ European Audiovisual Observatory

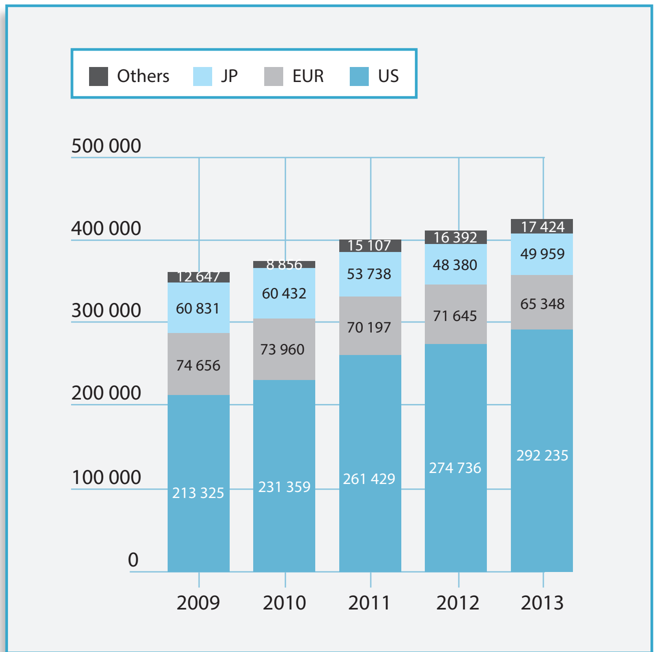
G.1.2 Breakdown of the audiovisual market worldwide

2009-2013

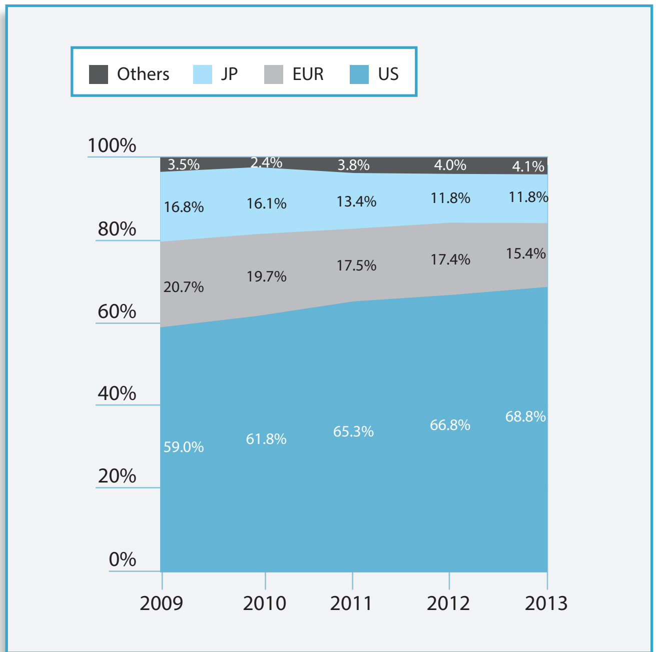
Includes activities in broadcasting, audiovisual on-demand services, film and TV production, distribution, exhibition, home video, recorded music, videogames and retail of audiovisual products. Segments other than audiovisual (such as print publications, consumers' electronics, cable networks, facilities) are not included.

Data not available for some large companies in Asia, Australia and Middle East.

USD million



2009-2013 USD million.



2009-2013 In %.

➡ European Audiovisual Observatory

T.1.3 G.1.3

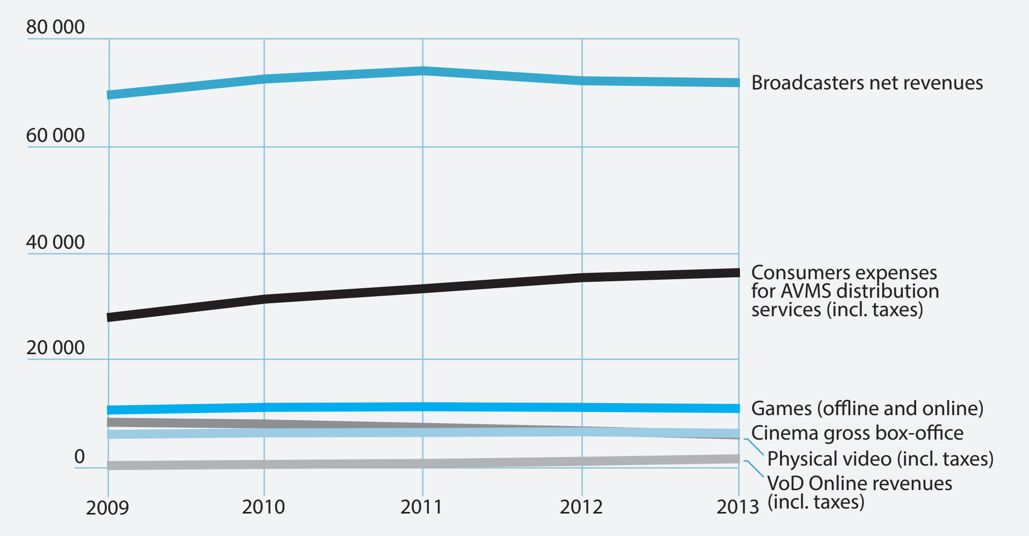
Size of the audiovisual market of the European Union (EUR 28)

2009-2013 EUR million.

	2009	2010	2011	2012	2013	2013/12	Sources
Broadcasters net revenues	**69 594**	**72 622**	**74 158**	**72 284**	**71 596**	***-1.0%***	OBS
Public broadcasters (incl. radio)	33 474	33 851	33 724	32 664	32 547	***-0.4%***	OBS
Advertising TV	19 613	21 163	21 713	21 151	20 656	***-2.3%***	OBS
Thematic channels	9 341	10 047	10 996	10 733	10 835	***0.9%***	OBS
Home shopping channels *est.*	2 453	2 610	2 719	2 792	2 813	***0.8%***	OBS
Local TV *est.*	1 326	1 395	1 350	1 278	1 138	***-10.9%***	OBS
Private radio *est.*	3 388	3 556	3 656	3 665	3 607	***-1.6%***	OBS
Consumers expenses for AVMS distribution services (incl. taxes) ❶	**27 950**	**31 417**	**33 362**	**35 427**	**36 374**	***2.7%***	OBS
Cable	11 212	11 844	12 201	12 790	12 869	***0.6%***	IHS
Satellite	13 874	15 689	16 336	16 913	17 255	***2.0%***	IHS
IPTV	1 785	2 375	3 222	4 029	4 525	***12.3%***	IHS
DTT	1 080	1 509	1 602	1 694	1 724	***1.7%***	IHS
Cinema gross box-office	**6 087**	**6 373**	**6 445**	**6 570**	**6 285**	***-4.3%***	OBS
Physical video (incl. taxes)	**8 359**	**8 037**	**7 405**	**6 758**	**5 991**	***-11.3%***	OBS
DVD retail ❷	6 691.4	6 179.6	5 511.5	4 868.1	4 214.6	***-13.4%***	IHS
DVD rental ❷	1 154	1024	876	722	563	***-22.0%***	IHS
Blu-ray disc retail ❷	499	807	980	1 118	1 170	***4.6%***	IHS
Blu-ray disc rental ❷	13.6	26.7	38.1	48.8	43.9	***-10.0%***	IHS
VoD online revenues (incl. taxes)	**248**	**462**	**648**	**1 045**	**1 526**	***46.1%***	OBS
Online on demand TV revenues	189	345	462	673	938	***39.4%***	IHS
Online on demand film revenues ❸	58.9	116.6	185.9	372.1	588.0	***58.0%***	IHS
Games (offline and online, excluding mobile and Apps)	**10 642**	**11 146**	**11 264**	**11 141**	**10 936**	***-1.8%***	IHS
Total	**122 881**	**130 057**	**133 281**	**133 223**	**132 708**	***-0.4%***	OBS
Growth		***5.8%***	***2.5%***	***0.0%***	***-0.4%***		

❶ Includes TV subscription, PPV and TV VoD revenues.
❷ Data related to 16 countries.
❸ Data related to 17 countries.

➡ European Audiovisual Observatory



2009-2013 In EUR million.

G.1.4 Yearly growth of the various branches of the audiovisual market in the EU 2009-2013 In %.

European Audiovisual Observatory

International trade in audiovisual services

Statistical analysis of the international trade in audiovisual services is not yet well developed. The traditional methodology employed by Eurostat and the national statistical institutes, based on data on the balance of international transactions, has proved very unconvincing, especially as it is impossible to distinguish between programme licensing transactions and deals relating to patents. Several years ago, the European Audiovisual Observatory produced data on revenues from sales of programmes on the international markets of American companies (data originating from the MPAA and the AFMA/IFTA) and scarce national European sources (CNC in the case of France, the ONS in the case of the United Kingdom). In 2010, the WTO published the *Manual on Statistics of International Trade in Services 2010 (MSITS 2010)* [1], which proposed a new approach for some service sectors, including audiovisual services.

Foreign affiliates statistics (FATS)

According to the MSITS 2010, the concept of "Audiovisual services" relates to the production of motion pictures (on film, video tape, or disk or transmitted electronically), radio and television programmes (live or on tape) and musical recordings. Performing arts and other live entertainment event presentation and promotion services (namely, live performances such as concerts and plays) are excluded from this item and included in artistic related services. However, the recording of live performances is included in audio-visual services and for these recordings, the same treatment as for other audio-visual products applies. Included in audio-visual services are amounts receivable or payable for rentals of audio-visual and related products and charges for access to encrypted television channels (such as those offering cable and satellite services).

Mass-produced audio-visual products (movies and music, including recordings of live performances) that are purchased or sold outright or for perpetual use, are included under audio-visual services if downloaded (in other words, delivered electronically). However, those on CD-ROM, disk, etc., are outside the scope of the EBOPS 2010 [2] standard categories (and included under general merchandise). Similar products obtained through a licence to use (other than when conveying perpetual use) are included in audio-visual services, as is other online content related to audio and visual media. Charges

Commerce international des services audiovisuels

L'analyse statistique du commerce international dans le domaine des services audiovisuels est encore très peu développée. La méthodologie traditionnelle utilisée par EUROSTAT et les instituts nationaux de statistiques, basée sur les données de balance des transactions internationales issues des banques nationales, s'avérait très improbable, étant donné notamment l'impossibilité de distinguer les transactions en matière de licences de programmes et celles relatives aux brevets. Il y a quelques années, l'Observatoire européen de l'audiovisuel produisait des données élaborées à partir des revenus de ventes de programmes sur les marchés internationaux des entreprises américaines (données provenant de la MPAA et de l'AFMA/IFTA) et des rares sources nationales européennes (CNC pour la France, ONS pour le Royaume-Uni). En 2010, l'OMC a publié le *Manual on Statistics of International Trade in Services 2010 (MSITS 2010)* [1] qui a proposé une nouvelle approche pour certains secteurs de services, dont celui des services audiovisuels.

Les statistiques de filiales étrangères (FATS)

Selon le MSITS 2010, « les *services audiovisuels* ont trait à la production de films cinématographiques (film, bande vidéo, disque ou par transmission électronique), d'émissions de radio et de télévision (en direct ou enregistrées) et d'enregistrements musicaux. Les services d'appui à la présentation de spectacles (à savoir les spectacles vivants tels que les concerts et les pièces de théâtre) sont exclus de cette entrée et inclus dans les *services artistiques*. Toutefois, l'enregistrement de spectacles vivants est inclus dans les *services audiovisuels* et le même traitement est appliqué à ces enregistrements que pour les autres produits audiovisuels. Sont inclus dans les services audiovisuels les droits perçus ou versés au titre de la location de produits audiovisuels et connexes et les frais d'accès à des chaînes de télévision cryptées (telles que celles qui offrent des services de télévision par câble et par satellite).

Les produits audiovisuels fabriqués en grandes séries (films et musique, y compris les enregistrements de spectacles vivants) qui sont achetés ou vendus directement ou pour une utilisation perpétuelle sont inclus dans les services audiovisuels s'ils sont téléchargés (en d'autres termes, fournis en ligne). Toutefois, les produits sur cédérom, disque, etc., n'entrent pas

Internationaler Handel audiovisueller Dienste

Die statistische Analyse des internationalen Handels im Bereich audiovisuelle Dienste steckt praktisch noch in den Kinderschuhen. Die traditionelle Methode für die Datenanalyse, die von EUROSTAT und den nationalen Statistikämtern genutzt wird, stützt sich auf die Daten der Zahlungsbilanz der internationalen Transaktionen, die von den nationalen Banken herausgegeben werden. Diese Methode hat sich für den audiovisuellen Bereich nicht unbedingt als geeignet erwiesen, da es z.B. unmöglich ist, zwischen Transaktionen im Bereich Programmlizenzen und Patenten zu unterscheiden. Vor einigen Jahren hat die Europäische Audiovisuelle Informationsstelle Daten erstellt, die auf zwei verschiedenen Quellen basieren: den Einnahmen aus dem Verkauf von Programmen amerikanischer Unternehmen auf internationalen Märkten (die Daten stammten von MPAA - Motion Picture Association of America – dem Verband der sechs großen amerikanischen Filmproduktionsgesellschaften – und AFMA/IFTA – Independent Film and Television Alliance) und auf den nationalen europäischen Quellen, die allerdings eher selten waren (CNC für Frankreich, ONS für das Vereinigte Königreich). 2010 hat die WTO das *Manual on Statistics of International Trade in Services 2010 (MSITS 2010 – Handbuch zur Statistik des internationalen Handels mit Dienstleistungen)* [1] herausgegeben, in dem ein neuer Ansatz für einige Dienstleistungssektoren vorgeschlagen wurde, unter anderem auch für audiovisuelle Dienste.

Die Statistik über die Struktur und Tätigkeit von Auslandsunternehmenseinheiten (FATS)

Dem MSITS 2010 zufolge „beziehen sich *die audiovisuellen Dienste* auf die Produktion von Kinofilmen (auf Film, Videoband, DVD oder elektronische Übertragung), auf Radio- und Fernsehsendungen (Livesendungen oder Aufzeichnungen) und auf Musikaufzeichnungen. Darstellende Künste und andere Liveveranstaltungen (d.h. Konzerte und Theaterstücke) sind von dieser Beschreibung ausgeschlossen. Sie werden statt dessen unter verwandten künstlerischen Dienstleistungen aufgeführt. Die Aufzeichnung von Live-Veranstaltungen fällt jedoch unter *audiovisuelle Dienstleistungen*, und für diese Aufzeichnungen gilt dieselbe Behandlung wie für die anderen audiovisuellen Produkte. Ebenfalls unter audiovisuelle Dienstleistungen einbezogen werden Beträge, die erhalten oder gezahlt werden für die

[1] *Manual on Statistics of International Trade in Services 2010*, This Manual has been developed and published jointly by the WTO, the European Commission, the IMF, the OECD, UNCTAD, the United Nations and the World Tourism Organization (UNWTO). http://unstats.un.org/unsd/tradeserv/TFSITS/msits2010.htm

[2] The EBOPS 2010 is the Extended Balance of Payments Services Classification, that was reviewed in 2010.

or licences to reproduce and/or distribute audio-visual products are excluded from audio-visual services and included in charges for the use of intellectual property n.i.e."

While the MSITS 2010 very clearly states that pay-TV activities and audiovisual services form part of audiovisual services (and not telecommunications activities), it is not very explicit with regard to video games, which could be considered to belong to the field of computer software.

In order to analyse statistics on the international trade in audiovisual services, the MSITS 2000 recommended using foreign affiliates statistics (FATS), which are considered more representative than balance of payments data.

Comparison of the initial results available

To our knowledge, the methodology proposed by the MSITS 2010 has not yet been extensively implemented by the statistical institutes. In the United States the Bureau of Economic Affairs (BEA) published for the first time in October 2014 data on the revenues of American affiliates abroad and foreign affiliates in the United States (see table T.1.5), in addition to more traditional data on the trade in intellectual property services (see table T.1.6). However, these data are not disaggregated by lines of business, and with regard to the revenues of European companies not disclosed in order to protect confidentiality (which generally indicates a very small number of companies trading). The statistics published by the US International Trade Commission are more a summary of business data than genuine structural business statistics. [3]

In Europe, Eurostat publishes data on the number of companies outside Europe by NACE division, but with no detailed breakdown by groups. [4] For NACE 59 (Production, post-production, distribution, exploitation, recorded music), 600 affiliates of foreign companies were recorded in the European Union in 2010 and 2011, generating revenues of EUR 10 billion in 2010 and 11.1 billion in 2011. For NACE 60 (Radio and television broadcasting), 100 affiliates of foreign companies were recorded in 2010, generating revenues of EUR 4.7 billion.

The European Audiovisual Observatory has conducted a more detailed analysis of all audiovisual activities (T.1.4/G.1.4 to G.1.7) by using data available in the Amadeus database, but after substantial revisions of the indexation of principal activities. By way of comparison with the Eurostat data, for 2010 the Observatory

dans le champ des catégories standard de l'EBOPS 2010 [2] et sont inclus dans les marchandises générales. Des produits similaires obtenus moyennant une licence d'utilisation (autres que celles conférant un droit d'utilisation perpétuelle) sont inclus dans les services audiovisuels, de même que les autres contenus en ligne liés aux moyens audiovisuels. Les droits ou licences de reproduction et/ou de distribution de produits audiovisuels sont exclus des services audiovisuels et inclus dans les *frais pour usage de propriété intellectuelle n.i.a.* ».

Si le MSITS 2010 indique très clairement que les activités de télévision à péage et les services audiovisuels font partie des services audiovisuels (et non des activités de télécommunication), il n'est pas très explicite sur les jeux vidéo, dont il pourrait être considéré qu'ils font partie du domaine des logiciels.

Pour l'analyse des statistiques de commerce international des services audiovisuels, le MSITS 2000 recommande de recourir aux statistiques de filiales étrangères (FATS), considérées comme plus représentatives que celles issues de la balance de paiements.

Comparaison des premiers résultats disponibles

A notre connaissance, la méthodologie proposée par le MSITS 2010 n'a pas encore fait l'objet de mise en œuvre approfondie par les instituts de statistiques. Aux Etats-Unis, le Bureau of Economic Affairs (BEA) a publié pour la première fois en octobre 2014 des données sur les revenus des filiales américaines à l'étranger et des filiales étrangères aux Etats-Unis (voir tableau T.1.5), complémentaires des données plus traditionnelles sur le commerce des services en matière de propriété intellectuelle (voir tableau T.1.6). Ces données ne sont cependant pas désagrégées par branches d'activités et, pour ce qui concerne les revenus des filiales des entreprises européennes, non divulguées pour protéger la confidentialité (ce qui indique généralement un tout petit nombre d'entreprises actives). Quant aux statistiques publiées par la US International Trade Commission, elles sont plus une synthèse de données professionnelles que de véritables statistiques structurelles d'entreprises. [3]

En Europe, EUROSTAT publie des données sur le nombre d'entreprises extra-européennes par divisions de la NACE, mais sans ventilation détaillée par groupes. [4] Pour la NACE 59 (Production, post-production, distribution, exploitation, musique enregistrée) 600 filiales

Vermietung audiovisueller und verwandter Produkte und die Gebühren für den Zugang zu verschlüsselten Fernsehsendern (Fernsehdienste über Kabel und Satellit).

Audiovisuelle Produkte, die in großer Zahl hergestellt werden (Filme und Musik, darunter auch die Aufzeichnungen von Live-Veranstaltungen), die gekauft oder direkt verkauft werden oder für unbegrenzte Nutzung zur Verfügung gestellt werden, zählen ebenfalls zu den audiovisuellen Diensten, wenn sie heruntergeladen werden (mit anderen Worten, auf elektronischem Weg zur Verfügung gestellt werden). Produkte auf CD-ROM, CDs usw. zählen nicht zu den Standardkategorien von EBOPS 2010 [2] und werden stattdessen unter allgemeinen Waren aufgeführt. Ähnliche Produkte, die über eine Nutzerlizenz gekauft werden (mit Ausnahme der Waren, die ein unbegrenztes Nutzungsrecht einräumen), zählen dagegen zu den audiovisuellen Diensten, ebenso wie andere Online-Inhalte im Zusammenhang mit audio- und visuellen Medien. Gebühren oder Lizenzen für die Vervielfältigung und/oder den Vertrieb audiovisueller Produkte sind von den audiovisuellen Diensten ausgeschlossen. Sie werden stattdessen unter der Rubrik „Gebühren für die Nutzung geistigen Eigentums" aufgeführt. *A.n.g.*"

Das MSITS 2010 gibt zwar sehr klar an, dass Pay-TV- und audiovisuelle Dienste Teil der audiovisuellen Dienste sind (und nicht unter die Telekommunikationsdienste fallen). Aber bei Videospielen ist die Einteilung nicht so klar. Hier hätte man davon ausgehen können, dass sie unter der Rubrik Software aufgeführt werden.

Für die Analyse der internationalen Handelsstatistiken der audiovisuellen Dienste empfiehlt das MSITS 2010, auf die Statistiken der Auslandsunternehmenseinheiten (FATS) zurückzugreifen, die als repräsentativer gelten als die Statistiken der Zahlungsbilanzen.

Vergleich der ersten vorliegenden Ergebnisse

Unseres Wissens nach ist die vom MSITS 2010 vorgeschlagene Methode von den Statistikämtern bisher noch nicht durchgehend eingesetzt worden. In den Vereinigten Staaten hat das US Bureau of Economic Analysis (BEA) im Oktober 2014 erstmals Daten über die Einnahmen von ausländischen US-Tochterunternehmen und über die Einnahmen ausländischer Tochterunternehmen in den USA veröffentlicht (siehe Tabelle T.1.5), zusätzlich zu den traditionelleren Daten über den Handel mit Dienstleistungen im Bereich des geistigen Eigentums (siehe Tabelle T.1.6). Diese Daten sind jedoch nicht nach Tätigkeitsbranchen aufgeschlüsselt, und wurden, was die Einnahmen

[3] USITC, *Recent Trends in US Service Trade*, May 2014. www.usitc.gov/publications/332/pub4463.pdf
[4] http://epp.eurostat.ec.europa.eu/portal/page/portal/european_business/data/database

identified in NACE 59 a total of 647 affiliates of foreign companies that were trading, with total operating revenues of EUR 18.6 billion. For NACE 60, 177 affiliates of foreign companies were identified in 2010, generating revenues of EUR 5.6 billion. To these figures it is necessary to add, again for 2010, 22 companies that provide on-demand audiovisual services and 17 companies that operate pay-TV platforms, with operating revenues of EUR 1.5 and 11 billion respectively.

It is also interesting to compare the data obtained with those of the BEA. According to the latter, in 2012 affiliates of US companies in Europe (including non-EU member states) generated revenues of EUR 6.2 billion with respect to NACE 59 and EUR 9.2 billion with respect to NACE 60, making a total of EUR 15.4 billion. According to the Observatory's calculations (for the European Union only), in 2012 the amounts were EUR 16.2 billion and EUR 5.6 billion respectively, to which it is necessary to add EUR 2.7 billion for on-demand video services and EUR 12.4 billion for pay-TV platforms, making a total of EUR 36.9 billion.

d'entreprises étrangères ont été enregistrées dans l'Union européenne en 2010 et 2011, générant un chiffre d'affaires de 10 milliards d'EUR en 2010 et de 11,1 milliards en 2011. Pour la NACE 60 (Diffusion radio et télévision), 100 filiales d'entreprises étrangères ont été enregistrées en 2010, générant un chiffre d'affaires de 4,7 milliards d'EUR.

L'Observatoire européen de l'audiovisuel a entrepris une analyse plus détaillée sur l'ensemble des activités audiovisuelles (T.1.4 / G.1.4 à G.1.7) en utilisant les données disponibles dans la base AMADEUS, mais après d'importantes révisions de l'indexation des activités principales. A titre de comparaison avec les données EUROSTAT, pour 2010, l'Observatoire identifie, dans la NACE 59, 647 filiales d'entreprises étrangères actives, représentant un produit d'exploitation de 18,6 milliards d'EUR. Pour la NACE 60, 177 filiales d'entreprises étrangères ont été identifiées en 2010, générant un chiffre d'affaires de 5,6 milliards d'EUR. A cela, il convient d'ajouter, toujours pour 2010, 22 entreprises éditrices de services audiovisuels à la demande et 17 entreprises opérant des plates-formes de télévision à péage, représentant respectivement 1,5 et 11 milliards d'EUR de produit d'exploitation.

Il est intéressant également de comparer les données obtenues avec celle du BEA. Selon ce dernier, en 2012, les filiales d'entreprises US en Europe (y compris des pays non membres de l'Union européenne) ont réalisé, pour la NACE 59 un chiffre d'affaires de 6,2 milliards d'EUR et 9,2 milliards d'EUR pour la NACE 60, soit un total de 15,4 milliards d'EUR. Selon les calculs de l'Observatoire (pour l'Union européenne uniquement), pour 2012 les montants étaient respectivement de 16,2 milliards d'EUR et de 5,6 milliards d'EUR, auxquels il faut ajouter 2,7 milliards pour les services de vidéo à la demande et 12,4 milliards pour les plates-formes de télévision à péage, soit un total de 36,9 milliards d'EUR.

der Tochterunternehmen europäischer Unternehmen betrifft, aus Gründen der Vertraulichkeit nicht veröffentlicht (dies ist in der Regel ein Indiz dafür, dass es sich nur um eine sehr kleine Zahl von Unternehmen handelt). Bei den Statistiken, die von der US International Trade Commission veröffentlicht werden, handelt es sich dagegen eher um eine Synthese von Branchendaten als um echte Unternehmensstrukturstatistiken. 3

In Europa veröffentlicht EUROSTAT Daten über die Zahl außereuropäischer Unternehmen nach der NACE-Klassifikation, aber ohne eine detaillierte Aufschlüsselung nach Branchengruppen. 4 Unter der Abteilung NACE 59 (Herstellung, Nachbearbeitung, Verleih und Vertrieb von Filmen und Fernsehprogrammen, Musikaufzeichnungen) wurden in der Europäischen Union 2010 und 2011 600 ausländische Tochterunternehmen mit einem Umsatz von 10 Milliarden EUR 2010 und 11,1 Milliarden 2011 registriert. Unter NACE 60 (Rundfunkveranstalter) wurden 2010 100 ausländische Tochterunternehmen mit einem Umsatz von 4,7 Milliarden EUR registriert.

Die Europäische Audiovisuelle Informationsstelle hat für sämtliche audiovisuellen Aktivitäten eine detaillierte Analyse durchgeführt (T.1.4 / G.1.4 bis G.1.7). Sie hat sich dabei auf die Daten in der Datenbank AMADEUS gestützt, aber vorher die Indexierung der Haupttätigkeiten erheblich überarbeitet. Zum Vergleich mit den Daten von EUROSTAT: Für 2010 führt die Informationsstelle unter NACE 59 647 aktive ausländische Tochterunternehmen auf mit einem Betriebsertrag von 18,6 Milliarden EUR. Unter NACE 60 wurden 2010 177 ausländische Tochterunternehmen aufgeführt mit einem Umsatz von 5,6 Milliarden EUR. Dazu müssen für das Jahr 2010 22 Anbieter von audiovisuellen Abrufdiensten hinzugezählt werden und 17 Unternehmen, die Pay-TV-Plattformen betreiben, mit einem Umsatz von 1,5 bzw. 11 Milliarden EUR.

Interessant ist ein Vergleich dieser Daten mit denen des BEA. Dem BEA zufolge haben die Tochterunternehmen amerikanischer Unternehmen in Europa 2012 (einschließlich der europäischen Länder, die nicht Mitglied der Europäischen Union sind) in der Abteilung NACE 59 einen Umsatz von 6,2 Milliarden EUR und unter der Abteilung NACE 60 einen Umsatz von 60 9,2 Milliarden EUR erzielt, also insgesamt 15,4 Milliarden EUR. Nach den Berechnungen der Informationsstelle (nur für die Europäische Union) sehen die Ergebnisse für 2012 wie folgt aus: 16,2 Milliarden EUR und 5,6 Milliarden EUR, zu diesen Beträgen müssen 2,7 Milliarden für die Abrufdienste und 12,4 Milliarden für die Pay-TV-Plattformen hinzugerechnet werden. Das sind insgesamt 36,9 Milliarden EUR.

➥ European Audiovisual Observatory

1 2 3 4 5 6 7 8

T.1.4 Number of companies and operating revenues of FATS companies established in the EU according to the country of origin of the ultimate owner

2008-2012 EUR thousand

Country of origin	Nb companies & operating revenues	2008	2009	2010	2011	2012	2012/11
5763 - Specialised retail							
KY - Cayman Islands	Nb companies	0	0	0	0	1	
	Operating revenues	0	0	0	0	119 115	*–*
US - USA ❶	Nb companies	14	17	18	20	20	
	Operating revenues	1 911 605	1 766 726	1 913 464	1 770 983	1 494 296	*-15.6%*
Total	**Nb companies**	**14**	**17**	**18**	**20**	**21**	
	Operating revenues	**1 911 605**	**1 766 726**	**1 913 464**	**1 770 983**	**1 613 411**	***-8.9%***
5821 - Videogames							
AU - Australia	Nb companies	1	1	1	1	1	
	Operating revenues	16 673	24 144	30 003	23 565	13 790	*-41.5%*
CA - Canada	Nb companies	0	0	0	1	1	
	Operating revenues	0	0	0	28	159	*458.4%*
CH - Switzerland	Nb companies	10	12	12	12	14	
	Operating revenues	60 591	75 984	73 308	65 356	92 489	*41.5%*
IN - India	Nb companies	2	2	2	2	2	
	Operating revenues	109 846	79 231	250 745	75 077	65 320	*-13.0%*
JP - Japan	Nb companies	39	43	43	43	42	
	Operating revenues	11 482 588	9 554 387	9 034 239	7 832 274	6 826 552	*-12.8%*
KY - Cayman Islands	Nb companies	0	0	0	0	1	
	Operating revenues	0	0	0	0	31 553	*–*
US - USA	Nb companies	36	40	41	41	39	
	Operating revenues	1 837 818	1 706 149	1 902 715	1 814 244	1 646 917	*-9.2%*
ZA - South Africa	Nb companies	0	0	1	1	1	
	Operating revenues	0	0	1 945	30 522	87 234	*185.8%*
Total	**Nb companies**	**175**	**200**	**233**	**248**	**274**	
	Operating revenues	**2 356 613**	**2 525 687**	**2 801 978**	**3 055 722**	**3 851 874**	***26.1%***
5911 - Production							
AE - Arab Emirates	Nb companies	0	0	0	2	1	
	Operating revenues	0	0	0	4 347	937	*-78.4%*
AU - Australia	Nb companies	1	3	3	3	4	
	Operating revenues	5	7 211	6 187	5 532	11 615	*110.0%*
BM - Bermudas	Nb companies	2	3	5	6	8	
	Operating revenues	22 918	30 597	26 582	30 727	46 277	*50.6%*
CA - Canada	Nb companies	3	4	5	5	7	
	Operating revenues	6 027	11 887	7 777	5 535	53 475	*866.2%*
CH - Switzerland	Nb companies	11	13	11	12	15	
	Operating revenues	136 457	178 565	147 754	145 474	176 827	*21.6%*
CN - China	Nb companies	1	1	1	0	0	
	Operating revenues	431	332	200	0	0	*–*
HK - Hong Kong	Nb companies	0	1	7	7	16	
	Operating revenues	0	11	756	24 169	14 404	*-40.4%*
IN - India	Nb companies	2	4	3	3	2	
	Operating revenues	761	16 693	5 137	973	72	*-92.6%*
JP - Japan	Nb companies	12	14	15	18	20	
	Operating revenues	80 608	85 255	128 610	138 337	333 722	*141.2%*
KY - Cayman Islands	Nb companies	2	2	3	3	3	
	Operating revenues	15 430	12 567	11 455	16 690	12 306	*-26.3%*
NO - Norway	Nb companies	1	1	1	1	1	
	Operating revenues	4 304	2 827	2 742	3 601	2 793	*-22.5%*
NZ - New Zeeland	Nb companies	0	1	1	1	0	
	Operating revenues	0	1 348	283	144	0	*–*
TN - Tunisia	Nb companies	7	7	7	7	6	
	Operating revenues	77 351	74 702	90 394	112 614	71 928	*-36.1%*

T.1.4 *continued*

Number of companies and operating revenues of FATS companies established in the EU according to the country of origin of the ultimate owner

2008-2012 EUR thousand

Country of origin	Nb companies & operating revenues	2008	2009	2010	2011	2012	2012/11
TR - Turkey	Nb companies	1	1	1	1	1	
	Operating revenues	5 050	3 582	4 331	2 201	2 035	*-7.5%*
US - USA	Nb companies	133	146	168	178	190	
	Operating revenues	2 083 136	2 202 690	2 444 214	2 645 465	3 209 822	*21.3%*
ZA - South Africa	Nb companies	0	0	1	1	1	
	Operating revenues	0	0	0	32	0	–
Total	**Nb companies**	**176**	**201**	**232**	**248**	**275**	
	Operating revenues	**2 432 478**	**2 628 268**	**2 876 423**	**3 135 841**	**3 936 212**	*25.5%*
5912 - Post-production							
AU - Australia	Nb companies	4	4	4	3	5	
	Operating revenues	183 780	184 352	184 735	177 957	182 565	*2.6%*
CA - Canada	Nb companies	4	4	4	5	5	
	Operating revenues	1 687	2 180	2 274	2 434	2 898	*19.1%*
CH - Switzerland	Nb companies	5	5	6	5	4	
	Operating revenues	32 119	33 297	35 036	31 784	32 202	*1.3%*
CN - China	Nb companies	0	0	1	1	1	
	Operating revenues	0	0	727	4 038	1 820	*-54.9%*
HK - Hong Kong	Nb companies	2	2	2	2	2	
	Operating revenues	91 103	96 910	96 716	118 902	127 278	*7.0%*
IL - Israel	Nb companies	1	1	1	2	2	
	Operating revenues	644	523	537	2 140	1 413	*-33.9%*
IN - India	Nb companies	5	6	7	10	8	
	Operating revenues	25 109	50 997	72 319	104 486	57 386	*-45.1%*
KY - Cayman Islands	Nb companies	4	4	4	4	4	
	Operating revenues	43 901	43 817	49 306	71 954	53 682	*-25.4%*
SA - Saudi Arabia	Nb companies	2	2	2	2	1	
	Operating revenues	1 835	2 175	2 258	2 033	628	*-69.1%*
TN - Tunisia	Nb companies	12	12	12	5	5	
	Operating revenues	92 250	86 149	80 948	4 400	5 201	*18.2%*
TR - Turkey	Nb companies	0	0	0	0	1	
	Operating revenues	0	0	0	0	678	–
US - USA	Nb companies	31	33	35	39	38	
	Operating revenues	277 088	290 868	311 981	337 241	364 400	*8.1%*
Total	**Nb companies**	**70**	**73**	**78**	**78**	**76**	
	Operating revenues	**749 517**	**791 268**	**836 837**	**857 369**	**830 150**	*-3.2%*
5913 - Distribution							
BR - Brazil	Nb companies	0	1	1	2	2	
	Operating revenues	0	53 027	50 931	19 950	20 807	*4.3%*
CA - Canada	Nb companies	4	5	5	6	6	
	Operating revenues	24 265	49 439	64 652	79 049	110 780	*40.1%*
CH - Switzerland	Nb companies	6	6	7	7	8	
	Operating revenues	125 444	119 463	245 178	222 885	217 159	*-2.6%*
HK - Hong Kong	Nb companies	1	1	1	1	1	
	Operating revenues	1 809	2 138	2 518	2 431	2 358	*-3.0%*
IN - India	Nb companies	5	5	5	5	5	
	Operating revenues	8 646	6 924	11 327	6 958	6 003	*-13,7%*
JP - Japan	Nb companies	18	23	24	25	21	
	Operating revenues	761 033	983 158	751 042	704 010	807 482	*14.7%*
KY - Cayman Islands	Nb companies	2	2	2	2	2	
	Operating revenues	66 856	132 337	164 082	201 882	223 929	*10.9%*
NO - Norway	Nb companies	1	1	1	1	1	
	Operating revenues	4 873	4 670	5 216	2 668	697	*-73.9%*
PA - Panama	Nb companies	1	1	1	1	1	
	Operating revenues	76	130	105	174	72	*-58.7%*

T.1.4 *continued*

Number of companies and operating revenues of FATS companies established in the EU according to the country of origin of the ultimate owner

2008-2012 EUR thousand

Country of origin	Nb companies & operating revenues	2008	2009	2010	2011	2012	2012/11
SC -Seychelles	Nb companies	1	0	0	0	0	
	Operating revenues	400	0	0	0	0	–
US - USA	Nb companies	146	151	151	144	142	
	Operating revenues	10 086 141	9 483 648	10 071 387	11 079 663	11 166 404	*0.8%*
VG - Virgin Islands	Nb companies	1	1	1	1	1	
	Operating revenues	886	1 901	2 728	7 230	4 392	*-39.3%*
ZA - South Africa	Nb companies	1	1	1	1	1	
	Operating revenues	22 743	20 729	23 514	36 512	55 396	*51.7%*
Total	**Nb companies**	**185**	**196**	**199**	**194**	**189**	
	Operating revenues	**11 103 173**	**10 857 565**	**11 392 680**	**12 363 413**	**12 615 479**	*2,0%*
5914 - Exhibition							
AU - Australia	Nb companies	8	9	10	10	12	
	Operating revenues	206 828	196 104	279 145	253 699	258 776	*2.0%*
CH - Switzerland	Nb companies	0	0	0	1	1	
	Operating revenues	0	0	0	1 733	2 081	*20.1%*
HK - Hong Kong	Nb companies	1	1	1	1	1	
	Operating revenues	133	106	112	90	84	*-6.8%*
IL - Israel	Nb companies	13	14	13	14	12	
	Operating revenues	485 740	574 622	728 531	670 829	600 399	*-10.5%*
TR - Turkey	Nb companies	1	1	1	1	1	
	Operating revenues	6 059	6 534	4 605	4 229	3 603	*-14.8%*
US - USA	Nb companies	8	8	9	10	24	
	Operating revenues	185 083	219 621	240 789	350 744	394 136	*12.4%*
Total	**Nb companies**	**31**	**33**	**34**	**37**	**51**	
	Operating revenues	**883 844**	**996 988**	**1 253 182**	**1 281 324**	**1 259 079**	*-1.7%*
5920 - Recorded music							
AE - Arab Emirates	Nb companies	1	1	1	1	1	
	Operating revenues	5 475	3 450	3 661	3 793	2 426	*-36.0%*
AU - Australia	Nb companies	2	2	1	0	0	
	Operating revenues	214	615	15	0	0	–
BS - Bahamas	Nb companies	2	2	2	2	2	
	Operating revenues	101 356	40 561	6 738	7 258	5 475	*-24.6%*
CA - Canada	Nb companies	1	1	1	1	1	
	Operating revenues	178	215	249	254	307	*21.0%*
CH - Switzerland	Nb companies	5	5	5	6	6	
	Operating revenues	7 040	7 213	2 787	2 648	2 738	*3.4%*
HK - Hong Kong	Nb companies	1	1	1	1	1	
	Operating revenues	7 000	5 200	5 200	5 200	5 200	–
JP - Japan	Nb companies	32	38	39	37	36	
	Operating revenues	1 327 508	1 395 666	1 156 505	1 068 364	1 121 361	*5.0%*
KY - Cayman Islands	Nb companies	1	1	1	1	1	
	Operating revenues	919	820	622	1 303	1 519	*16.6%*
SA - Saudi Arabia	Nb companies	1	1	1	1	1	
	Operating revenues	352	204	0	158	0	–
US - USA	Nb companies	43	50	51	50	49	
	Operating revenues	1 121 616	1 178 264	1 157 339	1 016 338	1 086 503	*6.9%*
Total	**Nb companies**	**89**	**102**	**103**	**100**	**98**	
	Operating revenues	**2 571 657**	**2 632 209**	**2 333 115**	**2 105 315**	**2 225 528**	*5.7%*
6010 - Radio broadcasting							
AU - Australia	Nb companies	5	5	5	5	5	
	Operating revenues	24 893	23 357	21 822	16 604	18 140	*9.3%*
BM - Bermudas	Nb companies	2	2	2	2	2	
	Operating revenues	4 597	3 945	3 798	3 397	3 546	*4.4%*

T.1.4
continued

Number of companies and operating revenues of FATS companies established in the EU according to the country of origin of the ultimate owner

2008-2012 EUR thousand

Country of origin	Nb companies & operating revenues	2008	2009	2010	2011	2012	*2012/11*
CA - Canada	Nb companies	2	2	2	2	2	
	Operating revenues	7 302	6 330	5 938	4 914	4 574	*-6.9%*
RU - Russian Federation	Nb companies	1	1	1	1	1	
	Operating revenues	36	35	5	15	0	
US - USA	Nb companies	4	5	5	5	6	
	Operating revenues	8 639	14 398	16 349	15 832	11 802	*-25.5%*
Total	**Nb companies**	**14**	**15**	**15**	**15**	**16**	
	Operating revenues	**45 467**	**48 067**	**47 912**	**40 762**	**38 062**	*-6.6%*
6020 - Television broadcasting							
AE - Arab Emirates	Nb companies	1	1	1	1	1	
	Operating revenues	2 858	4 879	7 274	5 871	5 130	*-12.6%*
BR - Brazil	Nb companies	1	1	1	1	1	
	Operating revenues	1 715	1 670	1 931	3 159	2 848	*-9.8%*
CH - Switzerland	Nb companies	3	3	3	3	3	
	Operating revenues	108 164	99 887	97 901	102 367	102 286	*-0.1%*
HK - Hong Kong	Nb companies	2	2	2	1	1	
	Operating revenues	3 902	3 666	3 696	3 529	4 060	*15.1%*
IN - India	Nb companies	2	3	2	1	1	
	Operating revenues	16 340	15 913	14 088	12 703	11 580	*-8.8%*
JP - Japan	Nb companies	11	12	12	13	13	
	Operating revenues	150 330	171 218	202 418	163 985	196 835	*20.0%*
KY - Cayman Islands	Nb companies	2	2	2	2	2	
	Operating revenues	5 058	4 575	4 590	4 845	5 144	*6.2%*
QA - Qatar	Nb companies	1	1	1	3	1	
	Operating revenues	12 684	22 521	23 289	44 274	35 764	*-19.2%*
RS - Serbia	Nb companies	0	0	1	1	1	
	Operating revenues	0	0	13	996	1 061	*6.5%*
RU - Russian Federation	Nb companies	1	1	1	1	1	
	Operating revenues	4 658	3 194	1 938	1 405	2 710	*92.8%*
SA - Saudi Arabia	Nb companies	2	1	1	1	1	
	Operating revenues	4 365	1 325	627	27	31	*13.1%*
TR - Turkey	Nb companies	2	4	4	4	2	
	Operating revenues	21 167	32 417	29 169	29 532	21 951	*-25.7%*
US - USA	Nb companies	111	122	130	136	129	
	Operating revenues	4 528 243	4 954 124	5 184 480	5 885 654	5 594 972	*-4.9%*
VG - Virgin Islands	Nb companies	1	1	1	1	1	
	Operating revenues	109	177	112	133	117	*-12.1%*
Total	**Nb companies**	**140**	**154**	**162**	**169**	**158**	
	Operating revenues	**4 859 593**	**5 315 566**	**5 571 528**	**6 258 480**	**5 984 490**	*-4.4%*
7722 - Renting of video							
US - USA	Nb companies	3	4	5	3	2	
	Operating revenues	481 606	501 833	576 948	202 330	49 204	*-75.7%*
Total	**Nb companies**	**3**	**4**	**5**	**3**	**2**	
	Operating revenues	**481 606**	**501 833**	**576 948**	**202 330**	**49 204**	*-75.7%*
On-demand audiovisual services [2]							
CH - Switzerland	Nb companies	2	2	2	2	2	
	Operating revenues	5 500	6 600	5 000	4 500	4 000	*-11.1%*
JP - Japan	Nb companies	2	2	3	3	3	
	Operating revenues	16 859	10 599	16 923	17 901	20 669	*15.5%*
US - USA	Nb companies	14	16	17	18	19	
	Operating revenues	897 501	1 136 144	1 452 581	1 953 288	2 692 968	*37.9%*
Total	**Nb companies**	**18**	**20**	**22**	**23**	**24**	
	Operating revenues	**919 860**	**1 153 342**	**1 474 504**	**1 975 689**	**2 717 636**	*37.6%*

T.1.4

continued

Number of companies and operating revenues of FATS companies established in the EU according to the country of origin of the ultimate owner

2008-2012 EUR thousand

Country of origin	Nb companies & operating revenues	2008	2009	2010	2011	2012	*2012/11*
AVMS Distribution platforms [3]							
AE - Arab Emirates	Nb companies	1	3	3	2	2	
	Operating revenues	148 845	204 754	248 454	309 571	279 269	***-9.8%***
CH - Switzerland	Nb companies	1	1	1	1	1	
	Operating revenues	80 000	95 000	109 137	105 430	105 948	***0.5%***
NO - Norway	Nb companies	1	1	3	3	3	
	Operating revenues	36 775	33 483	163 255	126 351	120 286	***-4.8%***
RS - Serbia	Nb companies	1	1	1	1	1	
	Operating revenues	2 042	3 443	4 602	6 895	8 449	***22.5%***
RU - Russian Federation	Nb companies	1	1	1	1	1	
	Operating revenues	3 266	3 194	2 042	2 130	2 104	
TN - Tunisia	Nb companies	1	1	1	1	1	
	Operating revenues	37 361	47 926	38 201	38 506	38 133	***-1.0%***
US - USA	Nb companies	5	7	6	6	8	
	Operating revenues	8 355 525	9 244 887	10 476 697	10 994 915	12 354 039	***12.4%***
VG - Virgin Islands	Nb companies	1	1	1	1	1	
	Operating revenues	1 089	1 065	1 016	969	949	***-2.1%***
Total	**Nb companies**	**12**	**16**	**17**	**16**	**18**	
	Operating revenues	**8 664 903**	**9 633 753**	**11 043 403**	**11 584 766**	**12 909 176**	***11.4%***
Total	**Nb companies**	**830**	**917**	**975**	**994**	**1 016**	
	Operating revenues	**47 994 955**	**47 587 358**	**50 466 216**	**51 272 759**	**52 766 543**	***2.9%***
Number and revenues of FATS companies established in the European Union by country of origin of the ultimate owner							
AE - Arab Emirates	Nb companies	3	5	5	6	5	
	Operating revenues	157 177	213 084	259 389	323 580	287 762	***-11.1%***
AU - Australia	Nb companies	21	24	24	22	27	
	Operating revenues	432 393	435 783	521 907	477 356	484 885	***1.6%***
BM - Bermudas	Nb companies	4	5	7	8	10	
	Operating revenues	27 515	34 543	30 380	34 124	49 823	***46.0%***
BR - Brazil	Nb companies	1	2	2	3	3	
	Operating revenues	1 715	54 697	52 861	23 110	23 656	***2.4%***
BS - Bahamas	Nb companies	2	2	2	2	2	
	Operating revenues	101 356	40 561	6 738	7 258	5 475	***-24.6%***
CA - Canada	Nb companies	14	16	17	20	22	
	Operating revenues	39 460	70 052	80 889	92 214	172 192	***86.7%***
CH - Switzerland	Nb companies	33	35	37	39	41	
	Operating revenues	419 052	437 887	569 366	537 598	559 833	***4.1%***
CN - China	Nb companies	1	1	2	1	1	
	Operating revenues	431	332	928	4 038	1 820	***-54.9%***
HK - Hong Kong	Nb companies	7	8	14	13	22	
	Operating revenues	103 947	108 031	108 999	154 320	153 383	***-0.6%***
IL - Israel	Nb companies	14	15	14	16	14	
	Operating revenues	486 384	575 146	729 068	672 969	601 813	***-10.6%***
IN - India	Nb companies	14	18	18	19	16	
	Operating revenues	160 702	169 758	353 617	200 197	140 361	***-29.9%***
JP - Japan	Nb companies	114	132	136	139	135	
	Operating revenues	13 818 927	12 200 283	11 289 737	9 924 871	9 306 621	***-6.2%***
KY - Cayman Islands	Nb companies	11	11	12	12	14	
	Operating revenues	132 165	194 116	230 054	296 674	447 248	***50.8%***
NO - Norway	Nb companies	3	3	5	5	5	
	Operating revenues	45 953	40 980	171 213	132 621	123 776	***-6.7%***
NZ - New Zeeland	Nb companies	0	1	1	1	0	
	Operating revenues	0	1 348	283	144	0	***–***

T.1.4 Number of companies and operating revenues of FATS companies established in the EU according to the country of origin of the ultimate owner

continued

2008-2012 EUR thousand

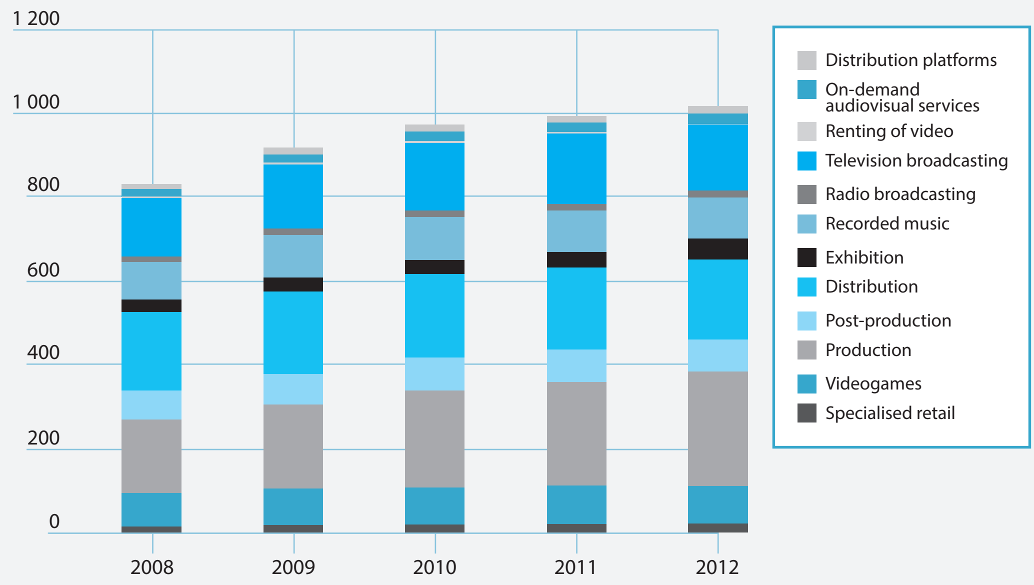
Country of origin	Nb companies & operating revenues	2008	2009	2010	2011	2012	2012/11
PA - Panama	Nb companies	1	1	1	1	1	
	Operating revenues	76	130	105	174	72	*-58.7%*
QA - Qatar	Nb companies	1	1	1	3	1	
	Operating revenues	12 684	22 521	23 289	44 274	35 764	*-19.2%*
RS - Serbia	Nb companies	1	1	2	2	2	
	Operating revenues	2 042	3 443	4 615	7 892	9 510	*20.5%*
RU - Russian Federation	Nb companies	3	3	3	3	3	
	Operating revenues	7 961	6 423	3 985	3 550	4 814	*35.6%*
SA - Saudi Arabia	Nb companies	5	4	4	4	3	
	Operating revenues	6 551	3 705	2 885	2 219	659	*-70.3%*
SC - Seychelles	Nb companies	1	0	0	0	0	
	Operating revenues	400	0	0	0	0	–
TN - Tunisia	Nb companies	20	20	20	13	12	
	Operating revenues	206 962	208 778	209 544	155 521	115 262	*-25.9%*
TR - Turkey	Nb companies	4	6	6	6	5	
	Operating revenues	32 277	42 533	38 105	35 962	28 267	*-21.4%*
US - USA	Nb companies	548	599	636	650	666	
	Operating revenues	31 774 001	32 699 352	35 748 944	38 066 696	40 065 463	*5.3%*
VG - Virgin Island	Nb companies	3	3	3	3	3	
	Operating revenues	2 083	3 143	3 856	8 332	5 457	*-34.5%*
ZA - South Africa	Nb companies	1	1	3	3	3	
	Operating revenues	22 743	20 729	25 459	67 066	142 630	*112.7%*
Total		**830**	**917**	**975**	**994**	**1 016**	
		47 994 955	**47 587 358**	**50 466 216**	**51 272 759**	**52 766 543**	*2.9%*

1. Does not include generalist retail store companies such as Amazon subsidiaries.
2. There is currently no class or sub-class of the NACE identifying clearly the activities of on-demand audiovisual services. We have included here companies providing VoD services (such as iTunes s.à.r.l.) and companies providing video portals (such as the Yahoo subsidiaries). The activities of Google (including YouTube) are not included. In the current administrative registers, companies providing VoD services or video portals are scattered in classes 4690, 5913, 6202, 6120, 6201, 6209, 6399, 7312, …
3. This activity of distribution of audiovisual media services does not appear in the NACE Rev.2. We have included here revenues of cable companies (using the consolidated accounts of Liberty Global Europe and the former Virgin Media group, rather than the individual companies of these groups), of satellite platforms (such as BSkyB, Sky Germany and Sky Italia) and of some DTT pay-TV platforms. Telecommunication companies providing IPTV services have not be taken into consideration as audiovisual activities do not represent their main activity. In the administrative registers, the cable company will generally be ranked in the class 6110 (Wired telecommunications). The company providing satellite pay-TV platforms are, in practice, scattered in the classes 5911, 6110, 6020, 6130.

➡ European Audiovisual Observatory on data from AMADEUS database and company reports

G.1.5 Number of FATS companies established in the EU by main activity

2008-2012 In units.

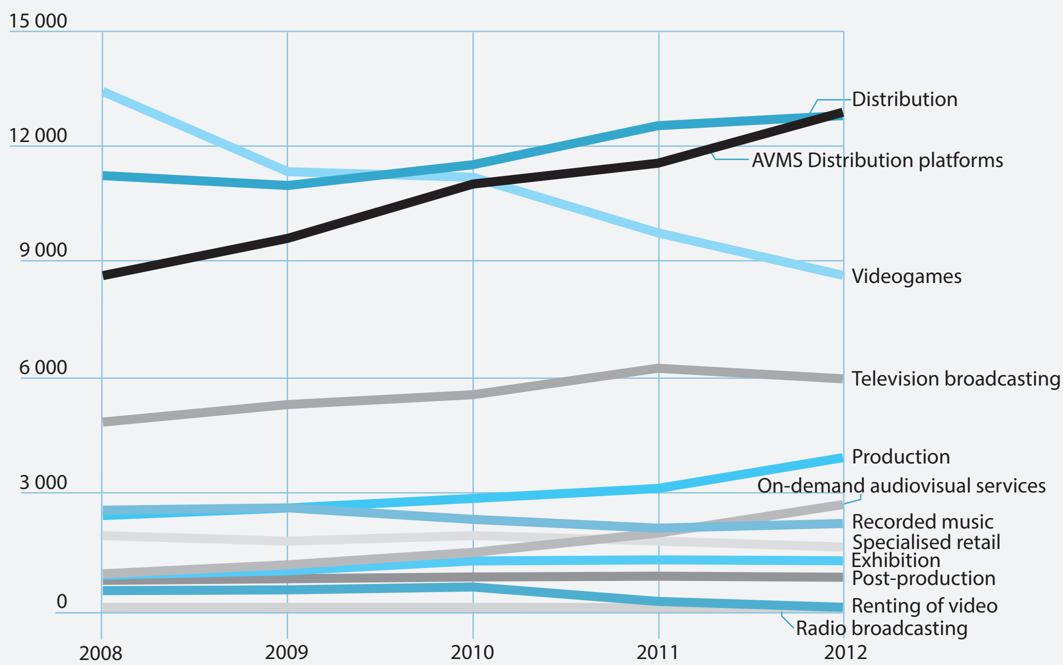


2008-2012 In units.

European Audiovisual Observatory

G.1.6 Operating revenues of FATS established in the EU by main audiovisual activity

2008-2012 EUR million.

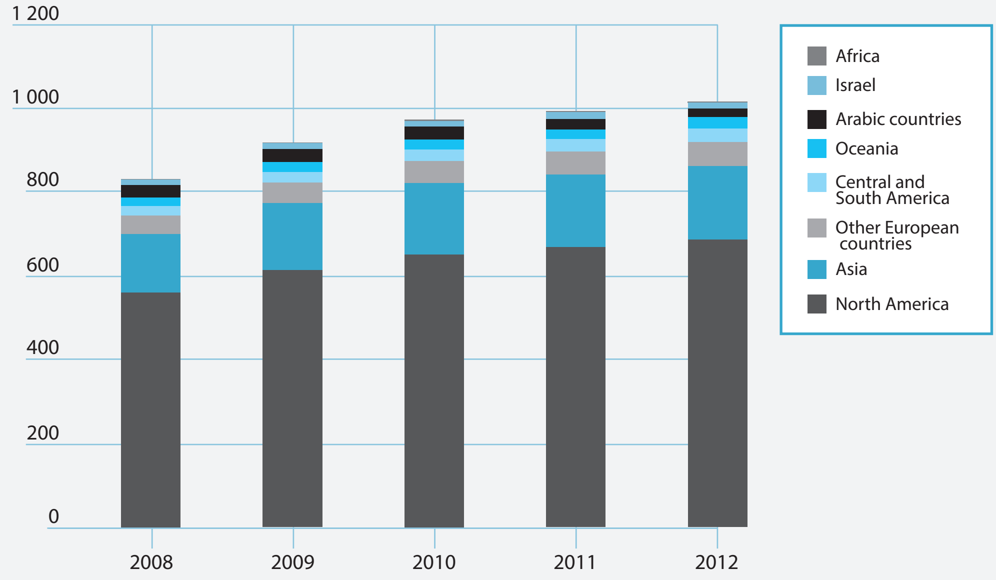


2008-2012 EUR million.

European Audiovisual Observatory

G.1.7 Number of audiovisual FATS established in the EU by region of origin

2008-2012 In units.

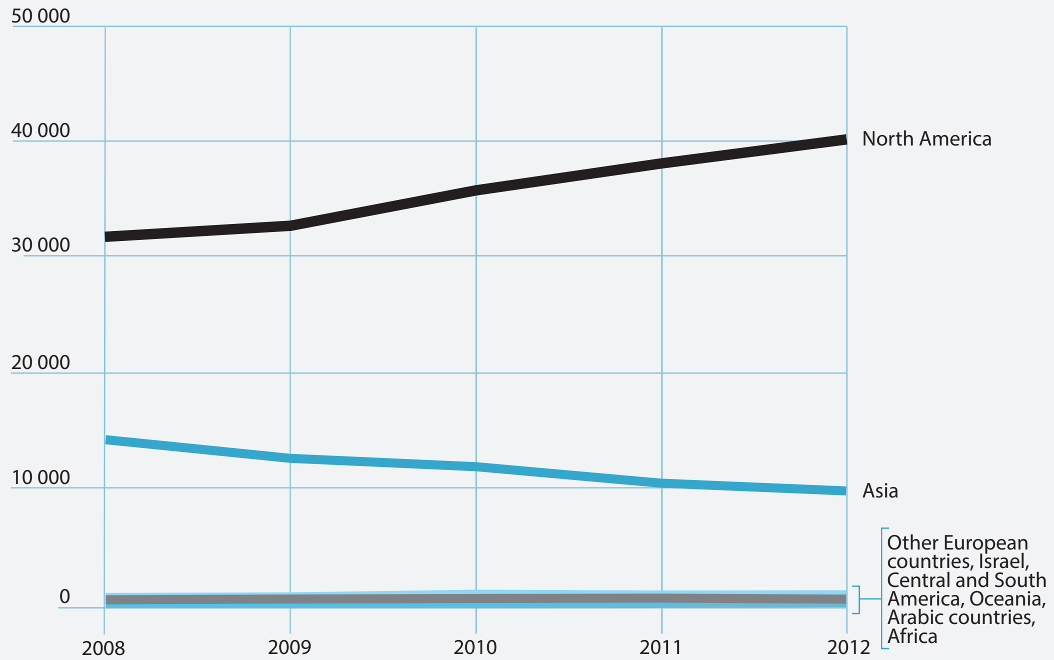


2008-2012 In units.

European Audiovisual Observatory

G.1.8 Evolution of audiovisual FATS revenues in the EU by region of origin

2008-2012 EUR million.



2008-2012 EUR million.

European Audiovisual Observatory

1
2
3
4
5
6
7
8

T.1.5

Services supplied to foreign persons in Europe by US MNEs through their MOFA, industry or affiliate, by country of affiliate

2011-2012 USD million.
MOFAs : Majority-owned foreign affiliates
MNEs : Multinational enterprises
MOUSAs : Majority-owned U.S. affiliates

	To foreign persons in Europe by US MNEs through their MOFA			To US persons by European MNEs through their MOUSAs		
	2011	2012	*2012/11*	2011	2012	*2012/11*
Motion picture and recording industry	9 028	8 160	***-9.6%***	non disclosed	non disclosed	***non disclosed***
- Motion picture	not disclosed	not disclosed	***not disclosed***	34	42	***23.5%***
- Sound recording industry	not disclosed	not disclosed	***not disclosed***	non disclosed	non disclosed	***non disclosed***
Broadcasting (except Internet)	11 291	12 148	***7.6%***	non disclosed	non disclosed	***non disclosed***
Internet services providers (includind publishing and broadcasting)	36 223	41 536	***14.7%***	non disclosed	non disclosed	***non disclosed***
Total	**56 542**	**61 844**	***9.4%***	**non disclosed**	**non disclosed**	***non disclosed***

➥ Bureau of Economic Affairs - BEA database (October 2014)

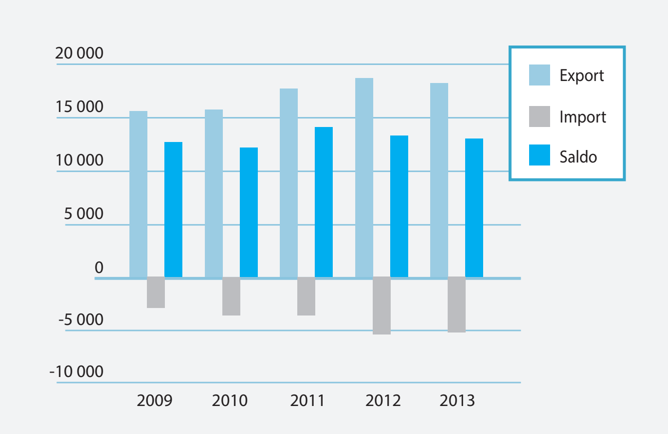
T.1.6
G.1.9

Export and import of audiovisual services (Charges for the use of intellectual property) by the US

2008-2013 USD million.

	2008	2009	2010	2011	2012	2013	*2013/12*
Export							
- Movies and television programming	13 230	13 731	13 690	15 195	16 165	15 844	***-2.0%***
- Books and sound recordings	1 493	1465	1 617	1 903	1 954	1 655	***-15.3%***
- Broadcasting and recording of live events	565	550	579	787	765	899	***17.5%***
Total audiovisual and related products	**15 288**	**15 746**	**15 886**	**17 885**	**18 884**	**18 398**	***-2.6%***
Import							
- Movies and television programming	1 782	1 912	1 661	2 101	2 567	2 451	***-4.5%***
- Books and sound recordings	780	794	913	1 130	1 382	2 149	***55.5%***
- Broadcasting and recording of live events	993	240	1053	413	1 525	675	***-55.7%***
Total audiovisual and related products	**3 555**	**2 946**	**3 627**	**3 644**	**5 474**	**5275**	***-3.6%***
Saldo							
- Movies and television programming	11 448	11 819	12 029	13 094	13 598	13 393	***-1.5%***
- Books and sound recordings	713	671	704	773	572	-494	***-186.4%***
- Broadcasting and recording of live events	-428	310	-474	374	-760	224	***-129.5%***
Total audiovisual and related products	**11 733**	**12 800**	**12 259**	**14 241**	**13 410**	**13 123**	***-2.1%***

➥ Bureau of Economic Affairs - BEA database (October 2014)



2009-2013 USD million.

T.1.7 The 40 leading production companies in Europe by operating revenues 2009-2013 EUR thousand.

Rank	Company	Country	2009	2010	2011	2012	2013	2013/12
1	EDAM Acquisition Holding IV B.V. (cons.) ❶	NL	1 270 582	1 245 903	1 361 773	1 278 623	1 263 771	-1.2%
2	Mediaproduccion SL	ES	579 571	759 005	~	893 491	930 525	4.1%
3	All3Media Holdings Ltd (cons.) ❷	GB	418 695	451 709	526 181	596 765	594 856	-0.3%
4	ITV Studios Ltd	GB	410 673	404 751	456 926	487 646	557 140	14.3%
5	Fremantlemedia Ltd	GB	306 453	341 039	359 893	409 086	407 168	-0.5%
6	Eyeworks Holding B.V. (cons.)	NL	201 902	216 813	237 142	250 813	274 288	9.4%
7	Europacorp	FR	274 213	230 657	215 039	204 362	~	~
8	Gaumont (cons.)	FR	105 796	101 088	130 950	105 329	169 100	60.5%
9	Fast Productions Ltd	GB	–	–		21 471	145 632	578.3%
10	TF1 Production	FR	171 748	147 709	156 730	134 552	136 161	1.2%
11	Point Productions Ltd	GB		8 655	1	131 760	~	~
12	Pathé Production	FR	89 043	87 378	168 730	108 310	128 549	18.7%
13	Ingenious Media Holdings plc	GB	533 958	328 741	384 803	186 985	128 503	-31.3%
14	World Advertising Media Movies	FR	78 186	102 715	110 205	109 026	128 004	17.4%
15	Independent Television News Ltd	GB	110 703	112 667	117 349	130 052	126 372	-2.8%
16	Tinopolos Ltd	GB	72 351	83 183	79 808	92 403	121 775	31.8%
17	Colgems Productions Ltd	GB	8 744	11 963	29 175	116 060	~	~
18	Carnival (Films and Theatre) Ltd	GB	19 789	24 641	43 894	62 801	102 802	63.7%
19	Associated Press Television News Ltd	GB	87 012	94 175	104 843	97 241	99 382	2.2%
20	Continental Films	FR	77 887	52 932	66 159	79 805	~	~
21	Hercules Productions Ltd	GB	–	–	–	–	88 348	10.7%
22	Taodue S.r.l.	IT	93 205	67 987	112 017	75 764	82 558	9.0%
23	Slovenska Produkcna A.S.	SK	51 403	65 631	68 159	72 383	70 985	-1.9%
24	Bavaria Fernsehproduktion GmbH	DE	115 607	102 347	99 232	70 862	~	~
25	Studio 100	BE	66 215	74 889	83 743	74 273	70 128	-5.6%
26	Constantin Entertainment GmbH	DE	70 000	70 000	70 000	70 000	70 000	0.0%
27	Nordisk Film A/S	DK	80 607	59 153	54 499	65 417	66 202	1.2%
28	Umedia Production	BE	~	~	~	54 341	64 054	17.9%
29	Foodles Production (UK) Ltd	GB	–	–	–	–	62 362	–
30	Cattleya S.r.l	IT	74 986	57 429	60 908	51 134	61 691	20.6%
31	Tiger Aspect Productions	GB	50 143	47 509	45 501	52 747	60 546	14.8%
32	Nyhetsbolaget Sverige AB	SE	–	–	–	67 253	59 256	-11.9%
33	Jack Morton Worldwide Ltd	GB	43 164	47 090	50 277	68 563	59 043	-13.9%
34	Globo Media SA	ES	105 182	94 828	82 672	57 731	~	~
35	Assembled Productions II UK Ltd	GB	–	–	–	–	57 350	–
36	Infinity Works Productions UK Ltd	GB					55 970	–
37	Briar Rose Productions Ltd	GB	26	5	~	49 399	55 148	11.6%
38	Scope Pictures	BE	16 258	17 452	24 298	51 650	54 381	5.3%
39	TF1 Films Production	FR	55 946	54 386	48 081	42 893	53 872	25.6%
40	C Productions	FR	56 869	61 328	62 849	55 276	53 867	-2.5%

❶ Edam Acquisition Holding was the joint-venture created in 2007 by Mediaset, Apollo Group and Cyrte to take control of Endemol. On 03/04/2012, Mediaset sold its majority stake in Endemol to Apollo and Cyrte. On 15/05/2014, Apollo and 21st Century Fox announced a joint venture to combine 21st Century Fox's Shine Group and Endemol and the Irish advertising agency CORE Media Group. The deal was signed in October 2014.

❷ In September 2014, all3media was acquired by a joint-venture between Discovery Communications Inc. and Liberty Global.

Not included as financial statements are not disclosed: StudioCanal (Vivendi, FR).

➥ European Audiovisual Observatory

T.1.8

The 40 leading distribution companies in Europe by operating revenues 2009-2013 EUR thousand.

Rank	Company	Country	2009	2010	2011	2012	2013	2013/12
1	The Walt Disney Company	GB	1 308 498	1 534 904	1 536 943	1 893 176	1 779 377	-6.0%
2	Universal Studio International B.V.	NL	1 251 508	1 289 994	1 384 520	1 474 028	~	~
3	Viacom Global (Netherlands) B.V.	NL	1 477 398	1 042 670	1 617 178	1 385 649	~	~
4	BBC Worldwide Ltd	GB	1 043 495	1 171 985	1 148 654	1 174 686	1 107 964	-5.7%
5	CBS International (Netherlands) B.V.	NL	178 624	242 077	330 216	375 712	469 198	24.9%
6	Warner Bros. France	FR	340 512	419 761	425 728	397 801	432 065	8.6%
7	Warner Bros. Entertainment UK	GB	374 536	435 066	515 695	398 694	414 569	4.0%
8	Highlight Communications AG	CH	435 467	439 109	380 370	427 334	403 880	-5.5%
9	RAI Cinema S.P.A.	IT	378 087	400 700	359 493	347 038	396 674	14.3%
10	The Walt Disney Company France S.A.	FR	217 351	413 421	412 871	364 456	338 470	-7.1%
11	The Walt Disney Company Italia S.r.l.	IT	318 451	347 560	366 494	387 475	338 082	-12.7%
12	United International Pictures B.V.	NL	192 707	231 077	352 954	270 380	333 143	23.2%
13	Warner Bros. Entertainment GmbH	DE	335 537	379 739	319 147	296 671	331 597	11.8%
14	Sony Pictures Television UK Rights Ltd	GB	21 017	25 780	31 881	273 999	~	~
15	Sociedad General de Produccion y Explotacion de Contenidos SL	ES	164 409	186 479	211 462	221 163	246 563	11.5%
16	Infront Italy S.r.l.	IT	61 031	165 838	188 546	204 614	230 609	12.7%
17	The Walt Disney Company (Germany) GmbH	DE	188 262	182 799	203 975	230 489	~	~
18	Columbia Pictures Corporation Ltd	GB	124 893	101 557	119 370	220 166	~	~
19	Viacom International Hungary	HU			130 358	283 827	206 283	-27.3%
20	Metropolitan Filmexport	FR	180 991	195 132	207 214	188 602	~	~
21	Universal Pictures Productions Limited	GB	227 152	205 266	246 193	233 265	185 012	-20.7%
22	Twentieth Century Fox Home Entertainment Ltd	GB	199 448	245 736	174 366	172 417	182 003	5.6%
23	TWI (UK) Ltd	GB	112 017	133 520	163 007	156 071	180 523	15.7%
24	E1 Entertainment UK Ltd	GB	94 537	117 245	153 091	177 955	~	~
25	Eros International plc	GB	112 910	116 308	154 893	166 948	~	~
26	CBS-CSI International B.V.	NL	107 560	121 766	149 485	124 697	151 799	21.7%
27	Pathé Distribution (AMLF)	FR	170 019	158 955	182 099	179 953	150 626	-16.3%
28	Granada International Media Ltd	GB	110 019	116 413	125 145	145 610	148 591	2.0%
29	Medusa Film spa	IT	207 003	226 485	207 154	191 206	148 485	-22.3%
30	SportA Sportrechte- und Marketing-Agentur GmbH	DE	142 786	129 863	149 635	129 361	~	~
31	2 Entertain Video Ltd	GB	241 058	212 788	188 645	154 940	128 406	-17.1%
32	Real Madrid Gestion de Derechos SL	ES	76 225	79 580	99 940	112 910	123 906	9.7%
33	Wild Bunch	FR	153 344	108 669	95 284	117 742	~	~
34	Warner Bros. Entertainment Italia S.r.l.	IT	93 721	92 430	112 670	116 812	~	~
35	Lions Gate UK Ltd	GB	54 443	64 849	70 789	114 376	~	~
36	Sevenone Media Austria GmbH	AT	74 808	94 204	108 897	114 089	~	~
37	Warner Bros. Entertainment Nederland B.V.	NL	80 575	98 445	115 607	107 600	~	~
38	Sportfive	FR	145 838	129 647	117 962	119 808	105 847	-11.7%
39	Société Nouvelle de Distribution	FR	138 196	137 724	126 202	55 700	105 247	89.0%
40	Universal Pictures International Ltd.	GB	88 062	77 057	96 646	103 883	~	~

➡ European Audiovisual Observatory

CHAPTER
CHAPITRE
KAPITEL
2

The distribution of audiovisual services

Distribution des services audiovisuels

Verbreitung von audiovisuellen Diensten

Digital platforms

This chapter focuses on the distribution of audiovisual services in Europe, on the main players involved, and on the revenues and consumer spend in the sector. Data on broadband availability (as provided by many of these operators and an important basis for the distribution of on demand services) is also included here. By the end of 2013, the number of European television households with digital reception had reached 80.9% and digitisation in the EU28 had reached 87.7% in 2013. Some of the countries with significant growth in digitisation in 2013 included Bulgaria and Russia (mainly due to the introduction and expansion of DTT).

The rest of the chapter is organised by type of distribution platform: digital terrestrial television (DTT), cable, satellite, IPTV and broadband. Data are also provided on the new modalities of reception of audiovisual services: PC, video games consoles, connected TV, tablets.

Graph G.2.1, shows the development over time of the provision of television packages in Europe, and details the growth in the number of platforms between the end of 2008 and the end of 2013.

Although the total number of pay DTT operators has remained stable for several years, many services have closed, e.g. TV Numeric in France and Teletenne in Belgium, while several new services have launched, e.g. Simpli TV in Austria, Towerhome in the Slovak Republic, and EVO TV in Croatia (all launched in 2013). With regard to cable services, the vast number of services in countries such as Bulgaria, Denmark, Spain, Hungary, Norway, Poland, Romania and Russia make it difficult to accurately assess the changes in the total number of operators in these markets.

The various chapters also outline the major events with regard to developments in ownership, mergers and rebrands in the cable, satellite and IPTV sectors, while an update on the implementation of DTT in Europe is also provided.

Plates-formes numériques

Ce chapitre se concentre sur la distribution des services audiovisuels en Europe, sur les principaux acteurs impliqués ainsi que sur les revenus et les dépenses de consommation du secteur. Les données sur la disponibilité de la large bande (communiquées par plusieurs de ces opérateurs et élément important pour la distribution des services à la demande) y figurent également. Fin 2013, le nombre de foyers européens recevant la télévision numérique a atteint 80,9 % et la numérisation dans l'UE28 87,7 %. Les pays dont la numérisation a connu la plus forte croissance en 2013 incluent la Bulgarie et la Russie (principalement en raison de l'introduction et de l'expansion de la TNT).

Le reste du chapitre est organisé par type de plate-forme de distribution : télévision numérique terrestre (TNT), câble, satellite, IPTV et large bande. Des données sont également fournies sur les nouvelles modalités de réception des services audiovisuels : PC, consoles de jeu vidéo, télévision connectée, tablettes..

Le graphique G.2.1 montre l'évolution dans le temps du nombre de bouquets de télévision en Europe, et détaille l'augmentation du nombre de plates-formes en Europe entre fin 2008 et fin 2013.

Même si le nombre total d'opérateurs de TNT payante est stable depuis plusieurs années, plusieurs services ont fermé, notamment TV Numeric en France et Teletenne en Belgique, tandis que plusieurs nouveaux services ont été lancés, par exemple Simpli TV en Autriche, Towerhome en République slovaque et EVO TV en Croatie (tous lancés en 2013). En ce qui concerne le câble, le grand nombre de services dans des pays tels que la Bulgarie, le Danemark, l'Espagne, la Hongrie, la Norvège, la Pologne, la Roumanie et la Russie rend difficile toute évaluation précise de l'évolution du nombre total d'opérateurs sur ces marchés.

Les différents chapitres décrivent également les événements majeurs survenus en matière de propriété, de fusion et de changement de nom dans les secteurs du câble, du satellite et de l'IPTV, et font également le point sur la mise en œuvre de la TNT en Europe.

Digitale Plattformen

Dieses Kapitel befasst sich in erster Linie mit der Verbreitung audiovisueller Dienste in Europa, es informiert über die wichtigsten Anbieter und über die Einnahmen sowie über die Verbraucherausgaben in diesem Bereich. Außerdem enthält es auch Daten zur Verfügbarkeit von Breitbandnetzen (die von vielen der Anbieter zur Verfügung gestellt werden und eine wichtige Grundlage für die Verbreitung von Abrufdiensten sind). Ende 2013 konnten in ganz Europa 80,9 % der Haushalte digitales Fernsehen empfangen, in der EU28 lag die Digitalisierungsrate 2013 sogar bei 87,7 %. Zu den Ländern mit einem besonders starken Wachstum bei der Digitalisierung im Jahr 2013 zählen Bulgarien und Russland (in erster Linie wegen der Einführung und des Ausbaus des digitalen terrestrischen Fernsehens).

Der Rest des Kapitels ist nach der Art der Übertragungsplattformen gegliedert: digitales terrestrisches Fernsehen (DVB-T), Kabel, Satellit, IPTV und Breitbandnetze. Es beinhaltet außerdem Informationen über die Empfangsmodalitäten audiovisueller Dienste: PC, Videospielkonsolen, Connected-TV, Tablets.

Abbildung G.2.1 zeigt die Entwicklung des Angebots von Fernsehpaketen in Europa im zeitlichen Verlauf und enthält genaue Angaben über die Zunahme der Plattformen in Europa zwischen Ende 2008 und Ende 2013.

Obwohl die Gesamtzahl der Pay-DVB-T-Anbieter über mehrere Jahre hinweg konstant geblieben ist, sind eine Reihe von Anbietern vom Markt verschwunden, z.B. TV Numeric in Frankreich und Teletenne in Belgien. Andere Anbieter kamen wiederum neu auf den Markt, z.B. simpliTV in Österreich, Towerhome in der Slowakischen Republik und EVO TV in Kroatien (alle 2013 gestartet). Bei den Kabeldiensten ist es aufgrund der großen Zahl von Anbietern in Ländern wie Bulgarien, Dänemark, Spanien, Ungarn, Norwegen, Polen, Rumänien und Russland schwierig, die Veränderungen in der Gesamtzahl der Anbieter in diesen Ländern zu bewerten.

Die einzelnen Kapitel befassen sich auch mit Veränderungen bezüglich Medienbesitz, Fusionen und Umbenennungen auf dem Kabelfernseh-, Satelliten- und IPTV-Sektor. Außerdem enthält das Kapitel noch aktuelle Daten zur Einführung von DVB-T in Europa.

T.2.1 Operators of digital platforms in Europe

2009-2013

The ranking does not include operators of IPTV nor mobile platforms (breakdown of revenues not published by telecom operators). Revenues of cable operators include pay-TV revenues as well as revenues from other services (Internet, fixed telephony, mobile telephony). Multi-utility companies operating cable activities are also excluded.

Operating revenues, EUR million, current rate.

Rank	Company	Country	Platform	Packages	2009	2010	2011	2012	2013	*2013/12*
1	Liberty Global Europe plc [1]	**GB**	CATV		4 858.2	6 311.1	7 344.0	7 513.0	10 513.0	***39.9%***
p.m.	- Virgin Media Finance plc (cons.) [2]	**GB**	CATV	Virgin Media	4 157.6	4 408.9	4 672.7	4 760.9	4 780.0	***0.4%***
p.m.	- UPC Holding B.V.	**NL**	CATV	consolidation	3 476.6	3 787.9	4 013.0	4 459.1	4 350.6	***-2.4%***
p.m.	- UPC DTH s.à.r.l.	**LU**	Sat-TV	UPC Direct	~	3 770.2	4 013.3	~	~	**~**
p.m.	- UPC Nederland B.V.	**NL**	CATV	UPC Nederland	820.6	869.9	913.8	955.1	935,2	***-2.1%***
p.m.	- Unitymedia KabelBW GmbH [3]	**DE**	CATV	Unity Media	–	86.7	1 630.4	1 801.6	1 927.0	***7.0%***
p.m.	- Unity Media GmbH	**DE**	CATV	Unity Media	–	866.9	–	–	–	**–**
p.m.	- Kabel BW GmbH (cons.)	**DE**	CATV	Unity Media	493.0	563.0	423.0	682.7	–	**–**
p.m.	- (Old) Unity Media GmbH	**DE**	CATV, Sat-TV	Unity Media	1 100.0	–	–	–	–	**–**
p.m.	- Telenet (turnover) [4]	**BE**	CATV, ThTV	Telenet	1 197.4	1 299.0	1 376.4	1 488.8	1 641.3	***10.2%***
p.m.	- Cablecom	**CH**	CATV	Cablecom	744.3	891.2	903.5	913.7	~	**~**
p.m.	- UPC Communications Ireland Ltd	**IE**	CATV	UPC	250.2	278.1	308.1	330.5	~	**~**
p.m.	- UPC Polska	**PL**	CATV	UPC	211.9	241.7	238.7	360.5	~	**~**
p.m.	- UPC Magyar	**HU**	CATV, Sat-TV	UPC, UPC Direct	272.3	228.7	195.6	214.6	213.9	***-0.3%***
p.m.	- UPC Telekabel Wien	**AT**	CATV	UPC Austria	221.2	219.4	211.9	211.3	212.2	***0.4%***
p.m.	- UPC Ceska Republika	**CZ**	CATV, Sat-TV	UPC, UPC Direct	192.2	199.5	176.4	177.9	157.8	***-11.3%***
p.m.	- UPC Romania	**RO**	CATV, Sat-TV	UPC, UPC Direct	152.9	132.9	125.4	126.7	129.1	***1.9%***
p.m.	- UPC Austria Services	**AT**	CATV	UPC	33.9	92.8	97.6	97.1	103.1	***6.2%***
p.m.	- UPC Broadband Slovakia	**SK**	CATV, Sat-TV	UPC, UPC Direct	53.9	48.3	46.7	47.0	47.5	***1.1%***
2	British Sky Broadcasting plc (cons.)	**GB**	Sat-TV, ThTV, BB	Sky	6 279.0	6 990.0	7 307.0	8 416.2	8 495.0	***0.9%***
3	Groupe Canal+ [5]	**FR**			4 553.0	4 712.0	4 857.0	5 013.0	5 311.0	***5.9%***
p.m.	Canal+ Distribution	**FR**	Sat-TV, IPTV, TNT	Canalsat	~	~	~	~	~	**~**
p.m.	Société d'édition Canal Plus S.A. (cons.)	**FR**	ThTV	Canal+ Le Bouquet	1 775.0	1 787.0	1 857.0	1 878.0	1 882.0	***0.2%***
p.m.	Canal + Cyfrowy	**PL**	Sat-TV	Canal + Cyfrowy	328.3	357.2	332.8	360.9	~	**~**
p.m.	ITI Neovision SP Z.O.O. [6]	**PL**	Sat-TV	N	106.8	~	268.5	198.7	~	**~**
p.m.	Canal+ Afrique	**FR**	Sat-TV, Thtv	Canal+ (African version)	96.2	124.3	140.2	169.6	~	**~**
p.m.	Canal Satellite Caraïbes	**FR**	Sat-TV	Canalsat	120.2	129.8	~	~	~	**~**
p.m.	Canal+ Overseas [7]	**FR**	Sat-TV		29.2	35.8	50.7	57.5	84.0	***46.1%***
4	Sky Italia (cons.)	**IT**	Sat-TV		2 661.0	2 875.6	2 872.9	2 896.9	2 927.3	***1.0%***
5	Kabel Deutschland Holding AG (cons) [8]	**DE**	CATV, Sat-TV	Kabel Digital	1 516.1	1 611.2	1 711.8	1 842.5	1 911.3	***3.7%***
6	Grupo Corporativo ONO	**ES**	CATV	TV Esencial, TV Extra, TV Total	1 512.0	1 471.7	1 485.0	1 573.0	1 598.0	***1.6%***
7	Ziggo N.V. [9]	**NL**	CATV	Ziggo	1 284.4	1 375.7	1 478.2	1 536.9	1 564.8	***1.8%***
8	Sky Deutschland AG	**DE**	Sat-TV	Sky Deutschland	902.1	976.8	1 138.7	1 333.2	1 546.5	***16.0%***
p.m.	Sky Österreich GmbH *est.*	**AT**	Sat-TV	Sky Österreich	~	92.7	24.3	126.6	~	**~**
9	Prisa (Division Audiovisual) [10]	**ES**		Canal +	1 770.7	1 372.4	1 241.2	1259.8	1357.6	***7.8%***
p.m.	Sogecable (cons.) [10]	**ES**		Digi +	1 523.7	1 083.3	994.5	1 079.9	–	**–**
p.m.	DTS (Via Digital) [11]	**ES**	Sat-TV	Digi +	154.7	1 028.4	980.0	1 071.9	1 170.4	***9.2%***
p.m.	Canalsatelite Digital S.L. [11]	**ES**	Sat-TV	Digi +	1 076.8	–	–	–	–	**–**
10	Elisa	**FI**	CATV	Elisa	1 219.6	1 174.9	1 366.3	1 380.3	1 311.0	***-5.0%***
11	Numericable Group [12]	**FR**	CATV	Numericable	~	1 274.6	1 350.2	1 305.6	1 319.6	***1.1%***

T.2.1

Operators of digital platforms in Europe
2009-2013

continued

The ranking does not include operators of IPTV nor mobile platforms (breakdown of revenues not published by telecom operators). Revenues of cable operators include pay-TV revenues as well as revenues from other services (Internet, fixed telephony, mobile telephony). Multi-utility companies operating cable activities are also excluded

Operating revenues, EUR million, current rate.

Rank	Company	Country	Platform	Packages	2009	2010	2011	2012	2013	*2013/12*
p.m.	NC Numericable	**FR**	CATV	Numericable	415.6	368.4	366.4	351.5	1 045.7	***197.5%***
p.m.	Numericable	**FR**	CATV	Numericable	597.6	636.7	690.5	726.5	–	**–**
p.m.	Cabovisao	**PT**	CATV	Cabovisao	152.5	138.8	126.2	120.7	98.7	***-18.2%***
p.m.	Est Vidéocommunication	**FR**	CATV	Numericable	65.6	63.2	58.7	~	–	**–**
p.m.	Coditel Brabant [13]	**BE**	CATV	Numericable	46.9	48.5	21.4	55.7	56.1	***0.7%***
p.m.	Numericable Belux [13]	**BE**	CATV	Numericable	–	–	–	65.5	–	**–**
p.m.	Coditel s.à.r.l.	**LU**	CATV	Numericable	16.9	16.1	~	~	~	**~**
12	Tecteo Group (cons.)	**BE**	CATV	Voo	440.3	554.9	653.1	743.9	808.6	***8.7%***
13	Zon Multimedia S.A. NOS SGPS [14]	**PT**	CATV, Sat-TV	ZON TV Cabo	823.0	859.7	854.8	858.6	787.1	***-8.3%***
p.m.	Zon TV Cabo Portugal	**PT**	CATV	ZON TV Cabo	687.2	709.8	693.7	666.7	–	**–**
14	DNA Oy (cons.)	**FI**	CATV	DNA	657.1	694.2	731.4	771.6	768.8	***-0.4%***
15	RCS & RDS SA	**RO**	CATV, Sat-TV	Digi TV	425.4	456.6	518.6	520.0	509.7	***-2.0%***
p.m.	Digi Tavkozlesi Kft	**HU**	CATV	Digikabel	91.5	106.2	117.3	135.7	134.8	***-0.7%***
16	Com Hem AB	**SE**	CATV	Com Hem	399.9	482.4	508.2	530.5	497.5	***-6.2%***
17	Polsat Cyfrowy S.A. (cons.)	**PL**	Sat-TV	Polsat	311.7	526.8	370.2	436.1	463.4	***6.3%***
p.m.	Polsat Cyfrowy S.A. (cons.)	**PL**	Sat-TV	Polsat	311.4	377.6	538.3	679.3	192.7	***-71.6%***
21	ER-Telecom Holding	**RU**	CATV	ER-Telekom	6.9	50.8	208.5	316.0	433.5	***37.2%***
22	Euskaltel	**ES**	CATV		339.5	344.7	351.3	339.4	329.7	***-2.9%***
23	Canal Digital Kabel TV AS	**NO**	CATV	Canal Digital	222.8	268.4	283.3	312.8	293.9	***-6.0%***
24	Viasat AB	**SE**	Sat-TV	Viasat	137.6	184.8	214.9	270.8	290.9	***7.4%***
25	Canal Digital Norge AS	**NO**	Sat-TV	Canal Digital	237.5	264.0	274.9	306.4	277.3	***-9.5%***
26	Get AS	**NO**	CATV	Get Digital TV	174.4	210.0	233.0	275.1	266.8	***-3.0%***
27	R Cable y telecomunicaciones Galicia SA	**ES**	CATV	R	202.6	222.1	230.5	238.2	239.5	***0.5%***
28	Boxer TV-Access	**SE**	DTT	Boxer TV	199.1	227.6	225.6	235.8	223.2	***-5.3%***
29	M7 Group	**LU**	Sat-TV	Tele-Vlandere, Télésat,…	~	131.1	145.6	214.9	~	**~**
30	Multimedia Polska	**PL**	CATV	Cyfrowa Telewizja Kablowa DTV	128.2	143.1	140.7	176.4	211.5	***19.9%***
31	NTV-Plyius	**RU**	Sat-TV	NTV+	180.2	202.9	212.9	227.1	208.0	***-8.4%***
32	Telia Sofa A/S	**DK**	CATV	Telia Sofia	136.9	146.8	150.9	180.0	189.9	***5.5%***
33	Canal Digital Sverige AB	**SE**	Sat-TV	Canal Digital	174.3	205.5	176.5	181.6	173.6	***-4.4%***
34	Multichoice Hellas	**GR**	Sat-TV	Nova Hellas	197.6	196.2	183.4	161.6	157.7	***-2.4%***
35	Vectra S.A. (cons.)	**PL**	CATV	Vectra telewizija	108.8	123.9	122.6	143.7	~	**~**
36	Rikstv AS	**NO**	DTT		69.0	114.6	130.0	148.0	139.0	***-6.1%***
37	Digi Tavkozlesi Kft	**HU**	CATV	Digikabel	91.5	106.2	117.3	135.7	134.8	***-0.7%***
38	Telecable de Asturias	**ES**	CATV	Telecable	106.9	121.6	126.4	129.8	134.1	***3.3%***
39	Viasat A/S	**DK**	Sat-TV	Viasat	140.9	148.7	150.8	136.9	129.2	***-5.6%***
40	Société intercommunale pour la diffusion de la télévision	**BE**	CATV	Brutele	79.6	89.7	94.6	108.0	112.5	***4.2%***
41	Anvia Oyj (cons.)	**FI**	CATV	Anvia	104.0	109.2	117.0	116.6	108.7	***-6.8%***
42	AB Sat	**FR**	Sat-TV	Absat	~	109.1	105.4	105.9	108.2	***2.2%***
43	JSC Akado-Stolitsa	**RU**	CATV	Akado	103.6	130.7	115.8	110.6	105.1	***-5.0%***
44	Forthnet Media Holding	**GR**	Sat-TV	Nova Hellas	0.1	47.7	126.2	117.6	101.5	***-13.7%***
45	Viasat AS	**NO**	Sat-TV	Viasat	89.5	105.5	113.7	119.5	98.8	***-17.3%***
46	Primacom Holding GmbH	**DE**	CATV	Primacom	111.4	110.3	97.2	96.0	~	**~**
47	Boxer TV A/S	**DK**	DTT	Boxer TV	4.0	16.4	29.5	74.9	82.2	***9.7%***
48	Telefonica Cable	**ES**	CATV	Telefonica Cable	72.6	61.1	72.7	79.2	–	**–**

T.2.1 Operators of digital platforms in Europe 2009-2013

continued

The ranking does not include operators of IPTV nor mobile platforms (breakdown of revenues not published by telecom operators). Revenues of cable operators include pay-TV revenues as well as revenues from other services (Internet, fixed telephony, mobile telephony). Multi-utility companies operating cable activities are also excluded

Operating revenues, EUR million, current rate.

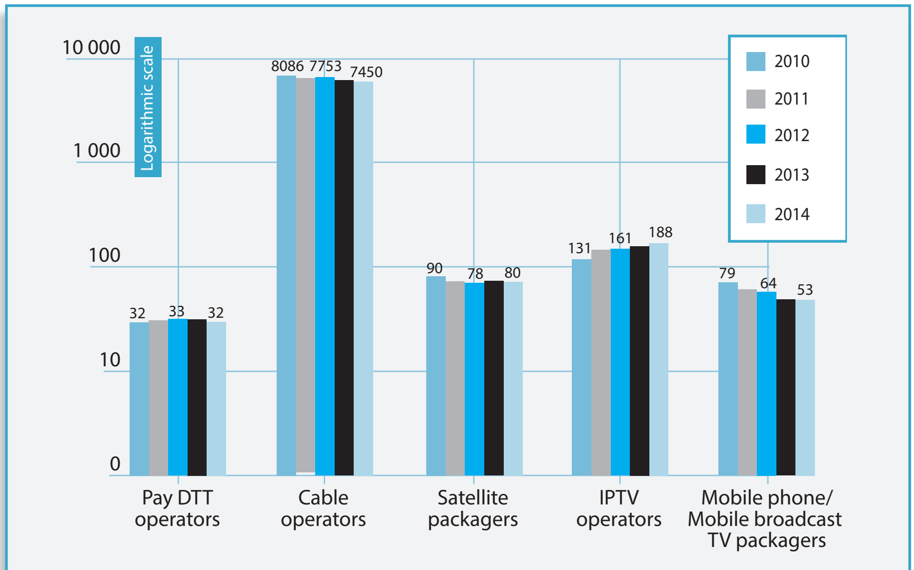
Rank	Company	Country	Platform	Packages	2009	2010	2011	2012	2013	2013/12
49	Canal Digital Danmark A/S [15]	**DK**	Sat-TV	Canal Digital	121.4	105.3	64.5	60.8	78.3	***28.8%***
50	CAIW Holding B.V.	**NL**	CATV	CAIW	62.8	63.5	62.2	73.5	75.9	***3.3%***

1. The accounts of Liberty Global Europle plc are published in USD. The total revenues include operations in Chile.
2. On 03/03/2006 ntl Incorporated completed a merger with Telewest Global, Inc. On 04/07/2006 ntl Incorporated completed its acquisition of Virgin Mobile, creating the first opportunity for customers in the UK to buy a 'quadruple-play'. The group was rebranded as Virgin Media. In June 2010 Virgin Media Inc sold the Virgin Media TV channels (Living, Livingit, Challenge, Challenge Jackpot, Bravo, Bravo 2 and Virgin1) to BSkyB. In February 2013 Liberty Global has confirmed an agreed USD 23.3 billion cash and stock bid for Virgin Media. Virgin Media is consolidated in Liberty Global Europe since 08/06/2013. Turnover for the period 08/06/2013-31/12/2013 was USD 3 653.7 millions (EUR 2 656.4 millions).
3. 2011 data pro forma. Unity Media GmbH was born in 2005 from the merger of the two cable operators IESY GmbH and ish. The group was fully acquired by Liberty Global in January 2010. The subsidiary Arenasat ceased operation of its satellite package in September 2010. In 2012 Kabel BW was folded into the Unitymedia credit pool and became Unitymedia KabelBW.
4. In December 2006, Liberty Global sold its interest in UPC Belgium to Telenet Group Holding N.V., the largest cable operator in Belgium. In a separate transaction, Liberty Global increased its ownership in Telenet to a controlling stake and on 31/03/2007 it owned 31.3%. Since March 2007, Liberty Global has progressively increased its ownership in Telenet to 51.1% as of 31/12/2007. In September 2012, Liberty Global Inc. launched a tender offer for the nearly 50% of Telenet Group Holding NV that it doesn't already own. In January 2013, Liberty Global announced that it has a stake of 58% in Telenet.
5. Groupe Canal+ is a holding, part of the Vivendi group. The group has not published the individual accounts of subsidiaries since 2004.
6. Following an agreement between the Canal+ Group and the TVN S.A. group, the platform "n" operated by ITI Neovision was merged with Canal+ Cyfrowa in 2012.
7. CANAL+ Overseas edits the CANAL+ premium channels in the overseas territories and Africa. It supplies custom-made channel offers to each market and ensures the broadcasting and distribution of over 300 channels through satellite.
8. In April 2008, Kabel Deutschland acquired the cable group Orion GmbH (EWT, Tele-Columbus GmbH).
9. In January 2014 Liberty Global has announced the takeover of Ziggo N.V. for approximately EUR 10 billion.
10. Sogecable was dissolved as at 31/07/2013 and merged in Prisa TV, the audiovisual holding of the Prisa Group associated with Telefonica Contenidos and Mediaset España. The audiovisual activities of Prisa include pay-TV but also (until 2012) free TV and other activities.
11. Service merged in 2003 with Canal Satélite Digital (Digi+). The company Canalsatelite Digital was merged with DTS in 2010.
12. In March 2005, the company Ypso acquired France Télécom Câble, TDF Câble and NC Numericable. In November 2005 Cinven acquired Altice One, owner of Coditel in Belgium and Luxembourg and of Videocom in France. In July 2006, Ypso acquired Noos/UPC France. Since August 2007, Numericable has been the common brand. In March 2008, the US equity company, The Carlyle Group, acquired 37.85% of the group Numericable-Completel. In 2013 Numericable was introduced in the stock exchange, and share of Altice reached 40%. This takeover (aiming at full control) was green lighted by the French Competition Authority in January 2014. In November 2014 the sale by Vivendi of the SFR telecommunication company to Altice S.A. was completed.
13. Coditel Belgique 2011 on 5 months. In July 2011 the French group Ypsos sold the companies Coditel in Belgium and Luxembourg to a consortium between the Luxembourg group Deficom Telecom (Deficom and Altice) and the private equity group Apax Partners. A new company Numericable Belux was created. In March 2013, Altice VII (controlled by Altice S.A. has taken the control of Coditel, with 40% of the shares.
14. After the merger with Optimus in 2013, Zon Multimedia was rebranded NOS SGPS in 2014.
15. The cable assets were acquired by Telia Stofa A/S in 2011.

Not included due to lack of information: Albasat (AL), DigitAlb (AL), Digitürk (TR).

➡ European Audiovisual Observatory

G.2.1 Number of TV distribution platforms in 37 European countries 2010-2014 In units.



2010-2014 In units.

The 2010 and 2011 data for all platforms have been adjusted to include Montenegro.
Cable data adjusted for all years for Russian Federation. IPTV data adjusted 2011-2013 for Bulgaria.

➡ European Audiovisual Observatory, MAVISE database

T.2.2

Digital TV reception in Europe

As at 31.12.2013 In thousand TV households (Primary).

Country	Number of digital TV households: Cable	Satellite (DTH)	Digital terrestrial	DSL (IPTV)	Total digital TV households *est.*	Total TV households	*Digital TVHH/ Total TVHH*
AL ❶	~	350	150	~	500	701	***71.3%***
AT	662	1 813	210	255	2 940	3 613	***81.4%***
BE	2 154	273	48	1 231	3 706	4 679	***79.2%***
BG	601	1 097	776	150	2 624	2 873	***91.3%***
CH	1 198	261	66	948	2 473	2 583	***95.7%***
CY	23	13	188	61	285	302	***94.4%***
CZ	498	2 040	1 430	227	4 195	4 437	***94.5%***
DE	6 010	17 872	1 913	2 077	27 872	38 649	***72.1%***
DK	939	240	326	389	1 894	2 335	***81.1%***
EE	85	76	114	169	444	550	***80.7%***
ES	1 089	2 224	13 271	749	17 333	17 487	***99.1%***
FI	1 446	114	669	261	2 490	2 416	***103.1%***
FR	1 082	9 374	4 419	10 814	25 689	27 165	***94.6%***
GB	3 759	11 848	11 047	1 478	28 132	28 183	***99.8%***
GR	0	928	2 660	65	3 653	4 405	***82.9%***
HR	83	226	904	366	1 579	1 637	***96.5%***
HU	724	1 048	351	440	2 563	3 700	***69.3%***
IE	377	918	239	36	1 570	1 621	***96.9%***
IS ❷	~	~	~	~	157	119	***131.9%***
IT	0	6 735	18 260	121	25 116	25 157	***99.8%***
LT	147	127	659	119	1 052	1 333	***78.9%***
LU	107	44	26	34	211	212	***99.5%***
LV	122	106	256	162	646	824	***78.4%***
ME ❸	~	43	~	62	103	195	***52.8%***
MK	20	19	248	88	375	534	***70.2%***
MT	59	3	68	6	136	142	***95.8%***
NL	3 524	716	600	1 514	6 354	7 381	***86.1%***
NO	663	771	309	318	2 061	2 215	***93.0%***
PL	2 376	7 758	905	263	11 302	13 449	***84.0%***
PT	1 286	710	791	985	3 772	3 887	***97.0%***
RO	1 646	2 404	0	53	4 103	7 167	***57.2%***
RU	2 676	17 267	7 617	3 473	31 033	51 156	***60.7%***
SE	785	797	1 067	659	3 308	4 537	***72.9%***
SI	231	54	267	239	791	824	***96.0%***
SK	219	830	271	199	1 519	1 797	***84.5%***
TR	592	10 390	7	286	11 275	19 948	***56.5%***
EUR 28	**30 034**	**70 388**	**60 722**	**23 122**	**185 042**	**210 762**	***87,8%***
EUR 36	**35 183**	**99 489**	**70 132**	**28 297**	**233 256**	**288 213**	***80.9%***

❶ Estimates based on operator data.
❷ Digital household data based on estimates, as the only data available are from Statistics Iceland as at 31/12/2010.
❸ Data for Montenegro is based on market reports from the regulator (Agency for electronic Media) and also by reference to subscriber numbers for the only satellite offer Total TV.

➥ IHS / European Audiovisual Observatory

Digital terrestrial television

By late 2014, all EU Member States had switched from analogue to digital terrestrial broadcasting with the exception of Greece and Romania. The DTT strategies were finally launched in 2013 in Bulgaria (with a rapid transition to switch-off), Bosnia and Herzegovina, Romania and Turkey. Montenegro completed a tender process in 2014. In Romania, Russia, Montenegro and Turkey the plan is to complete the switch-off process in 2015. It is not clear when the Greek switch-off will happen but possibly also 2015.

Cancellations of tender processes had caused delays in Romania, and Bosnia and Herzegovina, while there are on-going investigations by the European Commission regarding the tender processes in Bulgaria. In Turkey, following a Supreme Council decision from April 2014, the Turkish broadcasting regulatory authority RTUK had to cancel all of the national DTT licenses that it had awarded in 2013.

Legal issues also had a major impact on the Spanish DTT market in 2014. In November 2012, the Supreme Court declared null and void the decision of the Council of Ministers of 16 July 2010, which awarded an entire multiplex to each of the existing national commercial broadcasters for non-compliance with the applicable Audiovisual Law. The deadline for the closure of the nine relevant channels (Nitro, Xplora and La Sexta 3 from Atresmedia; Nueve and La Siete from Mediaset; Net TV, Veo TV, AXN and Marca TV) finally arrived in May 2014.

Data from the MAVISE database show that in 2014, the number of channels available on DTT networks in the EU member states included the following: 500 free national or international channels; more than 600 pay channels, and approximately 1 000 local and regional channels. For overall Europe the equivalent numbers are: 555 free national or international, channels, almost 800 pay channels and more than 1 100 local and regional channels. A very large number of local and regional channels are based in Spain, Denmark and Italy. Regional and local channels are in many cases struggling to cope with the transition to digital television. Following a consultation in the UK, it was decided to launch local television channels over the DTT networks. By December 2014 thirteen local channels had launched on the new Multiplex.

Subscriptions to Pay DTT experienced the most significant drop in 2011 (according to IHS data) in Italy with a reduction of almost 1 million subscribers, following the closure of several services. In 2013, there was a reduction of close to 5% in Pay DTT subscriptions.

The pay-DTT market has never really stabilised with services closing and other services opening in 2013 and 2014. While

Télévision numérique terrestre

Fin 2014, tous les États membres de l'UE sont passés de l'analogique à la radiodiffusion numérique terrestre à l'exception de la Grèce et de la Roumanie. Les stratégies de mise en oeuvre de la TNT ont finalement été lancées en 2013 en Bulgarie (avec une transition rapide à l'abandon de l'analogique), en Bosnie-Herzégovine, en Roumanie et en Turquie. Le Monténégro a terminé son processus d'appel d'offres en 2014. En Roumanie, en Russie, au Monténégro et en Turquie, l'objectif est d'achever le processus d'abandon de l'analogique en 2015. En Grèce, cette date n'est pas encore clairement fixée mais pourrait être en 2015.

Les annulations d'appel d'offres ont entraîné des retards en Roumanie et en Bosnie-Herzégovine, alors que des enquêtes de la Commission européenne sont en cours au sujet des processus d'appel d'offres en Bulgarie. En Turquie, à la suite d'une décision du Conseil suprême d'avril 2014, l'autorité de régulation de la radiodiffusion turque, RTÜK, a dû annuler toutes les licences de TNT nationale qu'elle avait accordées en 2013.

Les problèmes juridiques ont également eu une incidence majeure sur le marché de la TNT espagnole en 2014. En novembre 2012, la Cour suprême a déclaré nulle et non avenue la décision du Conseil des ministres du 16 juillet 2010 qui accordait un multiplex complet à chacun des radiodiffuseurs commerciaux nationaux existants pour non-respect de la loi sur l'audiovisuel en vigueur. La date limite pour l'arrêt des neuf chaînes concernées (Nitro, Xplora et La Sexta 3 d'Atresmedia ; Nueve et La Siete de Mediaset ; Net TV, Veo TV, AXN et Marca TV) était en mai 2014.

Selon la base de données MAVISE, en 2014, le nombre de chaînes disponibles sur les réseaux TNT dans les États membres de l'UE est le suivant : 500 chaînes nationales ou internationales gratuites, plus de 600 chaînes payantes et environ 1 000 chaînes locales et régionales. Et pour l'ensemble de l'Europe : 555 chaînes nationales ou internationales gratuites, près de 800 chaînes payantes et plus de 1 100 chaînes locales et régionales. Un très grand nombre de chaînes locales et régionales est basé en Espagne, au Danemark et en Italie. Ces chaînes ont souvent des difficultés pour faire face à la transition vers la télévision numérique. A la suite d'une consultation au Royaume-Uni, il a été décidé de lancer des chaînes de télévision locales sur les réseaux TNT. Ainsi, treize chaînes locales étaient lancées sur le nouveau multiplex en décembre 2014.

En Italie, les abonnements à la TNT payante ont connu leur baisse la plus importante en 2011 (selon les données IHS) avec près de 1 million d'abonnés en moins à la suite de la fermeture de plusieurs services. En 2013, les abonnements à la TNT payante ont enregistré un recul de près de 5 %.

Digitales terrestrisches Fernsehen

Ende 2014 hatten bis auf Griechenland und Rumänien alle EU-Mitgliedstaaten auf digitales terrestrisches Fernsehen umgestellt. Die DVB-T-Strategien wurden 2013 in Bulgarien (mit einem raschen Übergang zur Umschaltung), Bosnien und Herzegowina, Rumänien und der Türkei gestartet. Montenegro hat bereits ein Ausschreibungsverfahren in 2014 abgeschlossen. In Rumänien, Russland, Montenegro und der Türkei ist die Umstellung für 2015 geplant. Wann Griechenland die Analogübertragung abschalten wird, steht noch nicht fest, aber wahrscheinlich ebenfalls im Laufe des Jahres 2015.

Durch die Annullierung von Ausschreibungen war es in Rumänien und in Bosnien und Herzegowina zu Verzögerungen gekommen. Derzeit läuft noch ein Vertragsverletzungsverfahren der Europäischen Kommission gegen Bulgarien wegen Unregelmäßigkeiten bei den Ausschreibungen für digitale Rundfunkfrequenzen. In der Türkei musste die Rundfunk-Regulierungsbehörde RTUK nach einem Urteil des Obersten Gerichts vom April 2014 alle DVB-T-Lizenzen stornieren, die sie 2013 vergeben hatte.

Auch auf dem spanischen DVB-T-Markt gab es 2014 rechtliche Probleme. Im November 2012 hatte der Oberste Gerichtshof in Spanien eine Entscheidung des spanischen Ministerrats vom 16. Juli 2010 für null und nichtig erklärt mit der Begründung, dass sie gegen das geltende Rahmengesetz über audiovisuelle Kommunikation verstößt. Die Regierung hatte in ihrer Entscheidung an jeden der landesweiten kommerziellen Sender einen vollständigen Multiplex vergeben. Im Mai 2014 mussten die neun betroffenen Sender (Nitro, Xplora und La Sexta 3 von Atresmedia; Nueve und La Siete von Mediaset; Net TV, Veo TV, AXN und Marca TV) ihren Betrieb einstellen.

Laut der MAVISE-Datenbank (2014) umfasst das in der EU verfügbare DVB-T-Angebot 500 frei empfangbare nationale oder internationale Kanäle, über 600 Pay-TV-Kanäle sowie ungefähr 1 000 lokale und regionale Kanäle. Auf Gesamteuropa entfallen 555 frei empfangbare nationale oder internationale, beinah 800 Pay-TV sowie über 1 100 lokale und regionale Kanäle. Zu beachten ist jedoch, dass sehr viele dieser Kanäle ihren Sitz in Spanien, Dänemark und Italien haben. In vielen Fällen haben regionale und lokale Kanäle durchaus große Schwierigkeiten mit der Umstellung auf das Digitalfernsehen. Im Anschluss an eine Umfrage im Vereinigten Königreich war beschlossen worden, lokale Fernsehsender über die DVB-T-Netze zu starten. Bis Dezember 2014 hatten bereits dreizehn Sender ihren Betrieb über den neuen Multiplex aufgenommen.

the TV Numeric service closed in France in 2013, another service was launched by E Leclerc and TF1 with the TF1 pay channels in February 2014. In Belgium Telenet closed the Teletenne Pay-DTT services in March 2014, which had only been in operation since 2012. The Spanish service with AXN closed in May 2014 and media reports suggested that the Greek service offered by Forthnet would close by the end of 2014. At the same time, several new pay services have launched such as of Simpli TV in Austria, EVO TV in Croatia and Towerhome in the Slovak Republic (all launched in 2013).

Pay-DTT services have long been established in certain smaller states such as Estonia, Malta, Lithuania, the "Former Yugoslav Republic of Macedonia", and Albania where these pay services were launched in advance of free DTT.

The implementation of DTT throughout Europe and the end of simultaneous analogue transmission has freed space on the Multiplexes for new services. One example is high definition television. Whereas at the end of 2009, HDTV was only available in two countries (France and the United Kingdom), at the end of 2014 there were HD channels on the DTT platforms in twenty six European countries.

A second example is HbbTV services (hybrid broadcast broadband), which provide access to on-demand and interactive services. These are available (over DVB-T) for example in Austria, Belgium, Denmark, Finland, France, Germany, Spain, Poland, Hungary and the Czech Republic. In the digital strategies of Turkey and Russia, there are plans to introduce HbbTV services. In the UK, the Youview platform is based on a different standard (MHP). It was launched in 2012 and allows viewers of DTT to access catch-up TV services and other interactive services.

Le marché de la TNT payante ne s'est jamais vraiment stabilisé, des services fermant et d'autres ouvrant en 2013 et en 2014. Alors que le service TV Numeric a fermé en France en 2013, un autre service a été lancé par E Leclerc et TF1 avec les chaînes payantes de TF1 en février 2014. En Belgique, Telenet a fermé les services de TNT payante Teletenne en mars 2014, qui n'étaient actifs que depuis 2012. Le service espagnol, assuré par AXN, a fermé en mai 2014 et les médias ont laissé entendre que le service grec proposé par Forthnet fermera d'ici fin 2014. Dans le même temps, plusieurs nouveaux services payants ont été lancés, par exemple Simpli TV en Autriche, EVO TV en Croatie et Towerhome en République slovaque (tous lancés en 2013).

Des services de TNT payante existent depuis longtemps dans de petits États tels que l'Estonie, Malte, la Lituanie, l'« ex-République yougoslave de Macédoine » et l'Albanie où ces services payants ont été lancés avant la TNT gratuite.

La mise en œuvre de la TNT en Europe et la fin de la transmission analogique simultanée ont libéré de la place sur les multiplex pour de nouveaux services. Un premier exemple en est la télévision haute définition. Alors que fin 2009, la HDTV n'était disponible que dans deux pays (en France et au Royaume-Uni), fin 2014, les plates-formes TNT comptent des chaînes HD dans 26 pays européens.

Un second exemple concerne les services HbbTV (Hybrid Broadcast Broadband TV) qui permettent d'accéder aux services à la demande et interactifs. Ils sont notamment disponibles (sur DVB-T) en Autriche, en Belgique, au Danemark, en Finlande, en France, en Allemagne, en Espagne, en Pologne, en Hongrie et en République tchèque. Les stratégies numériques de la Turquie et de la Russie prévoient l'introduction de services HbbTV. Au Royaume-Uni, la plate-forme YouView repose sur une norme différente (MHP) ; elle a été lancée en 2012 et permet aux téléspectateurs de la TNT d'accéder aux services de télévision de rattrapage et autres services interactifs.

Bei den Pay-DVB-T-Abonnements war es 2011 (IHS-Daten zufolge) in Italien zu den größten Einbrüchen gekommen. Nachdem mehrere Anbieter ihren Betrieb eingestellt hatten, ging die Zahl der Abonnenten um fast 1 Million zurück. 2013 lag der Rückgang bei den Pay-DVB-T-Abonnements bei fast 5 %.

Bisher ist es auf dem Pay-DVB-T-Markt noch immer nicht zu einer Stabilisierung gekommen. 2013 und 2014 stellten zahlreiche Dienste ihren Betrieb ein, andere dagegen gingen erstmals ans Netz. So wurde in Frankreich TV Numeric 2013 eingestellt, E Leclerc und TF1 starteten im Februar 2014 neue Dienste mit den TF1-Pay-Sendern. In Belgien schloss Telenet im März 2014 Teletenne Pay-DVB-T, ein Dienst, der erst 2012 in Betrieb gegangen war.

Der spanische Anbieter mit dem Sender AXN stellte im Mai 2014 den Betrieb ein, und Medienberichten zufolge muss Ende 2014 mit der Schließung des griechischen Dienstes, der von Forthnet angeboten wird, gerechnet werden. Gleichzeitig haben jedoch eine Reihe neuer Pay-DVB-T-Plattformen den Betrieb aufgenommen, etwa simpliTV in Österreich, EVO TV in Kroatien und Towerhome in der Slowakischen Republik (alle 2013 gestartet).

In einigen kleineren Ländern wie Estland, Malta, Litauen, der Ehemaligen jugoslawischen Republik Mazedonien und Albanien gibt es solche Anbieter jedoch schon seit längerer Zeit.

Mit der Einführung von DVB-T in ganz Europa und der Abschaltung des Analogsignals wurden auf den Multiplexen Übertragungskapazitäten frei, die für eine Vielzahl neuer Dienste genutzt werden können. Zum Beispiel für High Definition-Fernsehen. Während es 2009 nur in Frankreich und im Vereinigten Königreich HDTV-Dienste gab, wurden bis Ende 2014 in mehr als 26 Ländern Europas HD-Kanäle über DVB-T angeboten.

Ein weiteres Beispiel sind HbbTV-Dienste (hybrid broadcast broadband), die den Zugang zu On-Demand und interaktiven Diensten ermöglichen. Solche Dienste gibt es (über DVB-T) etwa in Österreich, Belgien, Dänemark, Finnland, Frankreich, Deutschland, Spanien, Polen, Ungarn und der Tschechischen Republik. In den digitalen Strategien der Türkei und Russlands gibt es Pläne zur Einführung von HbbTV-Diensten. Im Vereinigten Königreich sendet die YouView-Plattform über einen anderen Standard (MHP). Sie war 2012 gestartet worden und bietet den Zuschauern Zugang zu Catch-up-TV und anderen interaktiven Diensten.

➥ European Audiovisual Observatory

T.2.3 Number of DTT households 2013-2014 In thousand.

Country	DTT primary HH %	DTT primary HH	DTT HHs (including second set) %	DTT HHs (including second set)	DTT equipment sold	DTT coverage	Date	Source
AL		100					12.13	Digitalb Pay DTT operator
AT	6.0%	208			19	98%	12.13	RTR - KommAustria (regulatory authority)
BE	1.0%	48					12.13	IHS/OBS
BG	27.3%	776					12.13	IHS/OBS
CH		21		164			12.13	Publicadata AG/ IHS
CY		188					12.13	IHS/OBS
CZ		1 430					12.13	IHS/OBS
DE	11.0%	3 000				100%	12.13	ALM (Association of State Media Authorities) (regulatory authority)
DK		326					12.13	IHS/OBS
EE	20.7%	114					12.13	IHS/OBS
ES	82.4%	14 409				99%	08.14	Kantar Media
FI	27.7%	669				99.9%	12.13	IHS/OBS
FR	16.3%	4 419	59.7%	16 580			12.13	IHS/CSA/OBS
GB		11 000		20 000		99%	03.13	Freeview
GR		2 660					03.13	IHS/OBS
HR		900	55.2%			98%	12.13	HAKOM (regulatory authority) Q4 2013
HU			9.3%	350		95%	12.13	Antenna Hungária (DTT operator, free and pay homes)
IE	10%	161	39.0%	632			03.14	ComReg 2014 (regulator)
IT	72.6%	18 260				99%	12.13	AGCOM/HIS/OBS
LT	49.4%	659				97.8%	12.13	IHS/OBS
LU	26.0%	26					12.13	IHS/OBS
LV	31.0%	256					12.13	IHS/OBS
MK	46.4%	248					12.13	IHS/OBS
MT	48.0%	68					12.13	Broadcasting Authority of Malta/IHS
NL	8.1%	600					12.13	IHS/OBS
NO	14.0%	309					12.13	IHS/OBS
PL	23.0%	3 092				97%	11.13	TNS Polska/OBS
PT	18.0%	791			1 500		12.13	Anacom/ IHS
SE	27.8%	1 343				99%	12.13	The Swedish Broadcasting Authority/MMS/OBS
SI	30%	267					12.13	IHS/OBS
SK		13			271		12.13	IHS/OBS
TR	0.0%	7					12.13	IHS/OBS

No data available yet for Romania where services were launched in 2013.
No data available for Iceland and Russia.

➥ European Audiovisual Observatory

1
2
3
4
5
6
7
8

T.2.4 Implementation of digital terrestrial television in Europe
December 2014

Country	Service Launch	Regional ASO	ASO Date	Business Model	Number of multiplexes	Multiplex operators and/ or free DTT packagers
Switch-off complete						
AT	2006	Complete	2010/ 2011	FTA + PayTV	6	17: 1 national (ORS) and 16 regional/ local operators
BE	2002	Complete	2010	(FTA + PayTV closed)	Flemish Community: 1 / 6 planned; French Community: 1	2: Norkring Belgie (25% owned by the VRT), RTBF
BG	2013	Complete (September 2013)	2013	FTA (+ PayTV planned)	3 (6 commercial and 1 public service licences issued)	3: First Digital EAD; and NURTS EAD (Towercom and Hannu Pro were awarded the multiplexes but tender process part of EU investigation. NURTS bought frequencies from Towercom. However launch and switchoff have been achieved).
CH	2001	Complete	2008	FTA + PayTV	6	1: SRG-SSR idée suisse.
CY	2010	Complete	2011	FTA + PayTV	3 / 6 planned	2: CyBC (Cyprus public broadcaster) launched the free DTT platform in March 2010 and broadcast the public channels; the consortium Velister Ltd won the competition to run the MUX carrying free-to-air private channels.
CZ	2005	Complete	2011	FTA (+ PayTV planned)	4	3: Radiocumikace, Digital Broadcasting s.r.o., Progress Digital (launched Multiplex 7 - the regional Multiplex - in May 2013).
DE	2002	Complete	2008	FTA (+ PayTV due to close)	4	10: Media Broadcast and 9 ARD regional stations
DK	2006	Complete	2009	FTA + PayTV	6 (MUX 7 reserved for mobile telephone, MUX 8 due to be decided on end of 2014)	2: Digi TV, jointly owned by DR and TV 2, operates MUX 1&2 (Free DTT), Boxer (Teracom) runs MUX 3-6
EE	2006	Complete	2010	FTA + PayTV	3	1: Levira (Estonian State/TDF)
ES	2000	Complete	2010	FTA + PayTV	9 national , 2-4 regional local. The Spanish government announced plans in 2012 to re-organise spectrum/ reduce number of multiplexes.	> 5 transmission companies (Grup Abertis (Retevision), Axion, Itelazpi, Teledifusion Madrid, Retegal etc.) + 6 national MUX operators (RTVE, Antenna 3 de television, Telecinco, La Sexta, Veo Television). Nine DTT channels closed in May 2014 following the Constitutional Court's decision that the licensing process in 2010 was invalid.
FI	2001	Complete	2007	FTA + PayTV	9 (+1 for mobile TV which should be used for DTT)	3: Digita (TDF) (4 MUX), DNA Finland (3 MUX), Anvia (2 MUX)
FR	2005	Complete	2011	FTA + PayTV	6 + 2 for HD channels launched December 2012	8: Société de gestion du réseau R1 (MUX 1), Nouvelles télévisions numériques (MUX 2), Société opératrice du multiplex R4 (MUX 4), Société du réseau de fréquences de télévision numérique terrestre R5 (MUX 5), Société d'exploitation du multiplex R6 (MUX 6) Société de R8, MHD7

FTA : Free-to-air

Pay DTT packagers	Standards	National free channels (public/private)	National pay channels	Local channels	HD channels
1: Simpli TV	MPEG-2 (DVB-T2 in 3 new MUXs)	13, of which 7 public (private channels not available in all regions)	26	32 regional/local and 11 windows	Yes
Telenet closed the pay DTT platform in March 2014.	MPEG-2 (Norkring planned DVB-T2 in 2013)	Flemish Community 5 of which 4 public / French Community 5 (all public)	No (closed March 2014)	No	No
	MPEG-4 AVC	13, of which 5 are public channels	No	No	Yes
	MPEG-2	4 public channels each in French and Italian linguistic area; 5 channels each in German and Rhaeto-Romanic area	No	14 regional channels	No
1: Lumiere TV	MPEG-4 AVC	11, of which 3 public	6	No	Yes
Rio Media (uses DVB-T to distribute digital version of cable package in some cities)	MPEG-2 / one MUX with MPEG-4 AVC (DVB-T2 trials)	26, of which 7 public	(Pay TV trial with 2 channels)	7 regional/local	Yes
1: "Viseo+" from Eutelsat visAvision GmbH (just in Halle/Leipzig and Stuttgart) is due to close 31/12/2014	MPEG-2 / MPEG-4 for PayTV (DVB-T2 planned in 2016; DVB-T2 trial in Berlin)	41 national (total 13 public) (private channels not available in all regions)	2 (RTL Passion and RTL Crime)	32 local and regional (+20 windows)	No
1: Boxer (Teracom)	MPEG-2 for MUX 1/ MPEG-4 for the others. DVB-T2 was launched in April 2012.	9 (all public)	34	179 local	Yes
1: Starman	MPEG-4 AVC	5, of which 4 public	39 with extra linguistic versions)	1	No
1: La Sexta (Gol TV), Veo Television's pay service (AXN) closed in May 2014	MPEG-2 / MPEG-4 for HDTV	26, of which 7 public	1	Between 400 and 500 (network foreseen for >1000: 2 to 12 regional channels per region, up to 4 local per area)	Yes
2: DNA Finland, Digi TV Plus ("Plus TV", formerly Teracom, was bought by DNA in April 2013 and is due to converge with DNA service). 3rd service TDF Entertainment closed in April 2012.	MPEG-2 / MPEG-4. DNA and Anvia MUX use DVB-T2 standard.	20, of which 7 public	37	No	Yes
2: Canal+ Distribution, Leclerc/ TF1 Distribution (launch of "Reglo TV" in July 2014). TV Numeric ceased its services at the end of 2012.	MPEG-2 / MPEG-4 for PayTV and HDTV (DVB-T2 planned in 2020; DVB-T2 trials in 2018)	31, of which 12 public and 11 HD channels	9 (includes 1 HD simulcast)	49 regional/local	Yes

1 2 3 4 5 6 7 8

T.2.4 Implementation of digital terrestrial television in Europe
December 2014

continued

Country	Service Launch	Regional ASO	ASO Date	Business Model	Number of multiplexes	Multiplex operators and/ or free DTT packagers
GB	1998	Complete	2012	FTA + PayTV	8	7 MUX operators (ITV plc, BBC, Digital 3 and 4, Arqiva Services Ltd) + 1 free DTT packager (DTV Services/Freeview). October 2012, Northern Ireland Multiplex launched by RTE with Irish public service channel. MUX for local TV operated by Comux launched in 2013.
HR	2007	Complete	2010/ 2011	FTA + PayTV	3 / 2 additional multiplexes, C and E doing DVB-T2 tests	2: Odašiljači Veze; and a consortium for MUC C and E (HP Produkcija, OIV and Croatian Post)
HU	2008	Complete	2013	FTA + PayTV	6 total (one for radio)	1: Antenna Hungaria ("Minidig")
IE	2011	Complete	2012	FTA	1 / 6 planned	1: Public service MUX launched by RTÉ in 2011
IT	2003	Complete	2012	FTA + PayTV	10 (before ASO) / 18 (after ASO)	6 MUX operators (Rai Way, Elettronica Industriale (Mediaset), Telecom Italia, Prima TV, Rete A, Tivultalia) + 1 free DTT packager : Tivu
LT	2006	Complete	2012	FTA + PayTV	4	2: Lietuvos radijo ir televizijos centras, Teo LT (TeliaSonera)
LU	2006	Complete	2006	FTA	4	1: BCE - Broadcasting Center Europe (RTL group)
LV	2009	Complete	2010	FTA + PayTV	7	1: Digitalais Latvijas Run TV Centrs (LVRTC)
MK	2009	Complete (May 2013)	2013	FTA + PayTV	3	2: One (Cosmofon/ Germanos/ On.net), Veselin LLC (launch 2013)
MT	2005	Complete	2011	FTA + PayTV	5	2: Public Broadcasting Services Ltd. (MUX for FTA channel), Go (Pay TV)
NL	2003	Complete	2006	FTA + PayTV	4	1: KPN
NO	2007	Complete	2009	FTA + PayTV	5	2: Norkrings (Telenor) owns the network, Norges Televisjon. NTV (NRK, Tele2, Telenor) operates the network.
PL	2009 (officialy 2010)	Complete	2013	FTA + PayTV	4 / 8 planned (4th used for mobile television)	1: TP Emitel (sold by France Telecom to EM Bidco); Info-TV FM, (subsidiary of Cyfrowy Polsat) runs the mobile TV services on MUX 4
PT	2009	Complete	2012	FTA	1 / 6 planned	1: Portugal Telecom (no longer launching PayTV)
SE	1999	Complete	2007	FTA + PayTV	7	1: Teracom
SI	2006	Complete	2011	FTA	2 / 6 planned (the second multiplex was dismantled by Norkring in 2012)	1: RTV SLO has MUX A and MUX C (and there are 6 local MUX operators). (Norkring which managed MUX B pulled out of market in 2012).
SK	2009	December 2012/ January 2013	2012	FTA + PayTV	4	1: Towercom

FTA : Free-to-air

Pay DTT packagers	Standards	National free channels (public/private)	National pay channels	Local channels	HD channels
1. BT Vision (Top Up TV ceased services in 2013)	MPEG-2 / DVB-T2 used for HDTV	81 (Freeview)	4 (BT Sports)	12 regional (and 45 windows) and 13 local channels	Yes
HP Produkcija (EVO TV, 2013)	MPEG-2 (DVBT-2 trials)	13, of which 5 public	40	19 (MUX D)	Yes
1: Antenna Hungaria ("Minidig Extra")	MPEG-4 AVC	12 national, of which 6 public	24	No	Yes
Commercial DTT launch postponed after operator handed back licence. Unlikely to be launched.	MPEG-4 AVC	10, of which 8 public	No	No	Yes
2 national pay DTT packagers: Centro Europa 7, Elettronica Industriale "Mediaset Premium" + several regional pay DTT packagers: Profit Group, Conto TV, Pangea etc.	MPEG-2 / MPEG-4. DVB-T2 for the MUX used by Centro Europa 7	67, of which 16 public (plus 11 foreign public)	Mediaset: 30 / Centro Europa: 9 (total 51)	>200 regional/ local	Yes
2: Teo LT (TeliaSonera), Balticum TV (in Vilnius only)	MPEG-4 AVC	11, of which 3 public	Teo: 63 and Balticum: 28	No	Yes (Teo platform only)
	MPEG-2 / MPEG-4	19, of which 0 public (includes 2 HD simulcasts)	No	No	Yes
1: Lattelecom (Latvian State/ TeliaSonera)	MPEG-4 AVC	2 public (TV3, LNT no longer accessible since 01/01/2014)	88	2	Yes
1: One "Boom TV" (Cosmofon/ Germanos/ On.net)	MPEG-4 AVC	8	39	24 regional	Yes
1: Go	MPEG-2	6, of which 2 public	51	No	No
7: KPN, Caiw Diensten, EDPnet, Stipte (formerly Scarlet), TELE2, Technos, T-Mobile	MPEG-2	3 (all public)	34	13 regional	Yes
1: Riks TV	MPEG-4 AVC	9 (all public)	41	12	Yes
1: Polsat Cyfrowy	MPEG-4 AVC	23, of which 10 public	8	16 windows/ 1 regional	Yes (2 public service)
Commercial DTT licence returned by Portugal Telecom	MPEG-4 AVC	5, of which 3 public	No	2 regional in autonomous regions	No
1: Boxer TV-Access (Teracom)	MPEG-2 / MPEG-4. MUX 6 and 7 use DVB-T2 standard.	11, of which 8 public (includes 2 HD simulcast)	48	No	Yes
	MPEG-4 AVC	8, of which 3 public	No	4 regional / 8 local	Trials
1. Towerhome (2013)	MPEG-2 / MPEG-4 planned for payTV.	13, of which 3 public	12	(Licences issued for regional channels)	Yes

T.2.4 Implementation of digital terrestrial television in Europe December 2014

continued

Country	Service Launch	Regional ASO	ASO Date	Business Model	Number of multiplexes	Multiplex operators and/ or free DTT packagers
Switch-off 2014/2015						
AL	2004		2015	PayTV (operates without licence)	4 / 7 planned	~
BA	2012/13		2015			Multiplex A awarded to public broadcasters BHT 1, FTV and RTRS; and in March 2014, further multiplexes assigned to Croatian company Odašiljači Veze (OIV).
GR	2006		2014/ 2015	FTA + PayTV	5	2: Digea (private channels), Digital Union (regional). Since the closure of the public service broadcaster, the public MUXs are not being used. They will probably be allocated to the new broadcaster.
IS	2005	Not complete (to be completed by February 2015)	2015	PayTV (+ FTA planned)	2	Vodafone (Dagsbrún group) runs 2 MUX. It will operate the digital broadcasting transmission of RÚV-channels (public broadcaster) for the next 15 years (starting 2014).
RU	2009		2015	FTA	2 / 3 planned	1: RTRS (national transmission company).
Launch 2013/2014						
ME	2014/ 2015		2015			1. RDC Radio - difuzni Centar (European Union providing funding to help with infrastructure). Further tenders in 2014
RO	Pilot tests		2015		5 national planned (4 UHF and 1 VHF)	3: SN Radiocom (awarded following a new tender in 2014)
TR	2013		2015 (likely to miss ITU deadline) [1]	(FTA + PayTV planned)	1 / 8 planned (1 TRT, 1 local/regional, 6 commercial)	Anten A.S. (pilot tests in major cities launched November 2013).

[1] Due to a Supreme Court decision from April 2014, the Turkish broadcasting regulatory authority RTUK had to cancel all national DTT licenses it awarded in 2013.

Digital terrestrial television

Télévision numérique terrestre

Digitales terrestrisches Fernsehen

FTA : Free-to-air

Pay DTT packagers	Standards	National free channels (public/private)	National pay channels	Local channels	HD channels
3: DigitAlb (Top Media group) runs 4 MUX without any license. Tring and TV Shijak also have unlicensed services	MPEG-4 AVC	No	86	No	Yes
Further tenders to be launched in 2014	DVB-T MPEG-4				
1. Nova (Forthnet Group) launched June 2012. Media reports suggest the Forthnet will close its Pay DTT service in 2014.	MPEG-2 / MPEG-4	11	2	11	
1: Vodafone (Dagsbrún group)	MPEG-4 AVC, DVB-T2 planned	8, of which 5 public (includes 1 HD simulcast)	26 (depending on location)	Yes (1)	Yes
	MPEG-4 AVC	8 (all public or mixed), plus 10 channels	No	(Regional on MUX1 2012)	No
	MPEG-4 AVC, DVB-T2	Tests with 5 national channels			
	MPEG-4 AVC, DVB-T2	12 national in trial phase		Windows of PSB	Yes
	DVB-T2	16			Yes

➥ European Audiovisual Observatory

T.2.5 Operators of pay-DTT services in Europe

End 2014 In thousand.

Country	Company	Group	Name of the service	Date of launch	[1] Pay channels	[1] Free channels	Number of subscribers (thousand)
AL	DigitAlb	Top Media Group	DigitAlb	2004	48	0	120 (12.2013)
AT	ORS	ORS	Simpli TV	2013	40		~
CY	Lumiere TV Ltd		LTV terrestrial	[2] 2011	6	9	~
DK	Boxer A/S	Teracom	Boxer	2009	34	8	335 (12.2013)
EE	Starman AS	East Capital Explorer [3]	ZuumTV	2006	39	5	60 (12.2012)
ES [4]	Gol Television S.L.	Televisa / Gamp (Mediapro)	Gol TV	2009	1	31	232 (03.2014)
FI	Digi TV Plus Oy [5]	DNA	Plus TV	2006	19	16	222 (12.2012)
	DNA Finland Oy		DNA Antenni TV [6]	2011	21	16	~
FR [7]	Canal+ Distribution S.A.S.	Vivendi	Canal+/ Canalsat 3 étoiles	2005	10	24	1 460 (12.2013)
	E. Leclerc/ TF1		Reglo TV	2014	4	~	~
GB [8]	BT Vision	BT	BT Vision	2006	4		
GR [9]	Nova	Forthnet Group	Nova DTT	2012	10		22 (12.2013)
HR	HP Produkcija	HP/ OIV	EVO TV	2013	45	31	10 (12.2013)
HU	Antenna Hungaria R.T. [10]	NISZ / Hungarian State	MinDig Extra TV	2010	24	12	125 (06.2014)
IS	Vodafone	Dagsbrún group	Digital Ísland	~	9 or 19	0	~
IT [11]	Centro Europa 7 S.R.L.		Europa 7 HD	2010	15	>60	~
	Elettronica Industriale S.P.A.	Mediaset	Mediaset Premium	2005	30	>60	2 200 (02.2014)
LT	UAB Balticum TV	Balticum Grupe	Balticum TV	~	17	12	8 (12.2012)
	Teo LT AB	TeliaSonera	Gala Digital	2006	51	12	58 (10.2014)
LV	Lattelecom SIA	Latvian State / TeliaSonera	Lattelecom Virszemes TV	2009	84	5	118 (12.2012)
MK	One	Cosmofon/ Germanos/ On.net	Boom TV	2009	40	26	75 (12.2013)
MT	GO plc		GO TV	2005	54	6	62 (12.2013)
NL	CAIW Diensten B.V.	CAIW Holding BV	Caiway DVB-T	2010	27	3	~
	EDPnet B.V.	EDPnet	EDPNet DigiTV	2009	27	3	~
	KPN N.V.	KPN	Digitenne	2003	27	3	717 (03.2013)
	Stipte B.V. [12]		Stipte	2010	27	3	~
	Technos B.V.		DigiTV	2010	27	3	~
	Tele2 Nederlands B.V.	Tele2	Tele2 via Digitenne	2007	27	3	~
	T-Mobile Netherlands B.V.		Digitale TV Digitenne	2011	27	3	45 (05.2013)
NO	RiksTV AS	NRK / TV 2 / Telenor	Riks TV	2007	57	4	515 (12.2013)
SE	Boxer TV-Access AB	Teracom	Boxer TV	1999	51	10	578 (12.2013)
SK	Towercom [13]	Macquarie Group Ltd.	Towerhome	2013	12	13	20 (12.2013)

[1] Does not include the regional and local channels.
[2] Lumiere TV operated an analogue terrestrial premium channel before the transition to DTT.
[3] In May 2013, Swedish investment company East Capital Explorer AB has agreed to acquire a majority stake in Starman.
[4] The pay DTT service of AXN closed in May 2014.
[5] Teracom sold Digi TV Plus Oy to DNA Ltd in the third quarter 2013 following approval by the Finnish Competition and Consumer Authority.
[6] In November 2013, DNA announced the convergence between its DTT offering and that of Plus TV.
[7] The TV Numeric service in France closed in 2013.
[8] Top Up TV closed in the UK in 2013.
[9] Media reports suggest the Forthnet will close its pay DTT service in 2014.
[10] Antenna Hungaria was sold by the French company TDF to the Hungarian state-owned company NISZ in 2014.
[11] In addition, several regional pay DTT packagers are operating in Italy (Profit Group, Conto TV, Pangea etc.).
[12] At the end of 2013, Belgacom sold the Dutch operations of its unit Scarlet to the local management and on 01/06/2014, Scarlet Digitale TV changed its name to Stipte.
[13] Towercom launched its pay service in 2013, and the company was taken over by Luxembourg company Macquarie Group Ltd in 2014.

➡ European Audiovisual Observatory

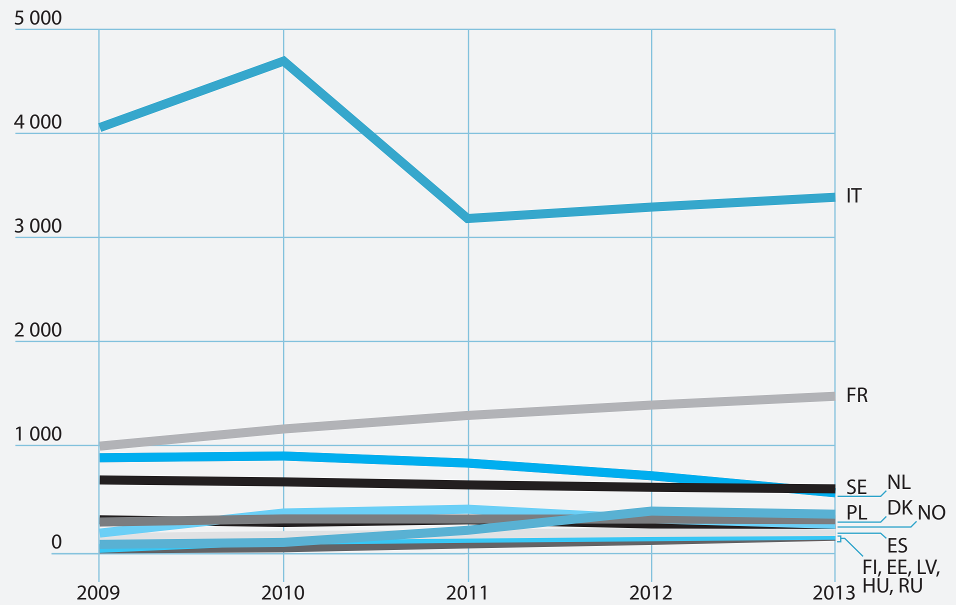
T.2.6
G.2.2

Number of subscribers to pay-DTT services in Europe

2009-2013 In thousand.

Country	2009	2010	2011	2012	2013	*2013/12*
AT	0.0	0.0	0.0	0.0	9.0	–
BE	0.0	0.0	0.0	0.4	1.6	***300.0%***
CH	26.7	25.4	24.9	24.4	20.6	***-15.6%***
CZ	0.0	0.0	0.0	0.0	20.0	–
DK	44.8	63.5	180.0	365.0	335.0	***-8.2%***
EE	110.0	128.3	144.0	159.6	168.9	***5.8%***
ES	153.2	346.7	383.4	290.2	237.2	***-18.3%***
FI	281.2	255.2	280.8	240.8	236.8	***-1.7%***
FR	990.0	1 155.0	1 285.0	1 385.0	1 470.0	***6.1%***
GB	585.0	307.0	347.0	287.0	0.0	***-100.0%***
GR	0.0	0.0	0.0	8.0	22.0	***175.0%***
HR	0.0	0.0	0.0	0.0	31.4	–
HU	1.0	12.0	49.0	82.8	123.2	***48.9%***
IT	4 055.0	4 695.0	3 180.0	3 290.0	3 385.0	***2.9%***
LT	46.7	63.7	71.9	75.8	68.0	***-10.3%***
LV	7.0	84.0	103.0	118.0	133.3	***13.0%***
MK	10.1	42.9	50.4	53.5	75.2	***40.7%***
MT	46.7	63.7	71.9	75.8	68.0	***-10.3%***
NL	878.0	895.0	827.0	705.0	541.0	***-23.3%***
NO	259.6	289.7	288.6	287.9	281.9	***-2.1%***
PL	878.0	895.0	827.0	705.0	541.0	***-23.3%***
RU	66.0	75.0	78.0	83.0	87.0	***4.8%***
SE	664.5	646.0	617.0	594.0	579.0	***-2.5%***
SK	0.0	0.0	0.0	0.0	20.0	–
Total EUR 28	**8 741.1**	**9 610.1**	**8 367.0**	**8 382.5**	**7 990.4**	***-4.7%***
Total EUR	**9 103.6**	**10 043.1**	**8 809.0**	**8 831.2**	**8 455.1**	***-4.3%***

➥ IHS



2009-2013 In thousand.

T.2.7 Operating revenues of DTT pay-TV 'pure players' operators
2008-2013 EUR million.

Company	Country	2008	2009	2010	2011	2012	2013	2013/12
Boxer TV-Access AB	SE	180.8	199.1	227.6	225.6	235.8	223.2	-5.3%
Rikstv AS	NO	58.1	99.4	153.108	168.2	195.3	139.0	-28.8%
Gol Television S.L.	ES	0.4	55.1	206.1	208	153.6	~	~
Boxer TV A/S	DK	–	4.0	16.4	29.5	74.9	82.2	9.7%
Digi TV Plus Oy	FI	52.4	58.2	62.1	61.6	62.2	62.0	-0.3%
Prima TV S.P.A.	IT	37.4	47.9	38.2	38.5	38.1	23.8	-37.5%
Veo Television S.A.	ES	15.1	13.2	31.5	35.1	~	~	~
Centro Europa 7	IT	2.7	1.7	1.4	0.5	2.9	~	~
HP Produkcija d.o.o. (1)	HR	–	–	–	–	2.0	4.0	97.4%
Simpli Services GmbH & CO KG (2)	AT	–	–	–	–	–	1.4	~
Towerhome A.S. (3)	SK						0.2	~
Dahlia TV S.R.L. (4)	IT	0.7	87.4	66	–	–	–	–
Dahlia Television S.A. (5)	ES	0.2	0.0	–	–	–	–	–
TV Numeric (6)	FR	–	–	3	–	–	–	–

(1) EVO TV was launched at the beginning of 2013 by HP Produkcija (a joint venture between Croatian Post and OiV Transmission company).
(2) Simpli TV launched in April 2013 (the company is a subsidiary of ORS).
(3) Towerhome launched the service Plustelka in May 2013 (the company is a subsidiary of Towercom).
(4) Bankruptcy in March 2011.
(5) Service closed in January 2010.
(6) Bankruptcy in 2011.

The table does not contain data on revenues of pay-DTT services provided by companies carrying out other activities in the market, as it is not possible to separate the revenues for pay-DTT only in their financial statements.

➥ European Audiovisual Observatory

T.2.8 Total pay-DTT consumer spend on subscription
2009-2013 EUR million.

Country	2009	2010	2011	2012	2013	2013/12
BE	0	0	0	14	138	900.0%
CH	3 214	3 426	3 698	3 713	3 302	-11.1%
CZ	0	0	0	762	762	0.0%
DK	4 887	13 090	33 454	76 889	98 533	28.2%
EE	159	208	3 807	4 029	4 488	11.4%
ES	5 267	51 838	70 634	67 981	53 224	-21.7%
FI	88 629	80 184	78 746	80 310	84 255	4.9%
FR	275 019	339 256	393 935	442 526	480 709	8.6%
GB	88 806	88 010	68 885	74 120	33 239	-55.2%
GR	0	0	0	1 078	4 041	275.0%
HR	0	0	0	0	1 927	–
HU	10	208	1 563	3 282	5 095	55.2%
IT	355 207	620 926	572 513	533 969	560 099	4.9%
LT	3 574	5 038	5 954	6 618	6 550	-1.0%
LV	257	3 616	7 939	9 857	11 646	18.2%
MK	30 386	158 799	279 415	268 504	298 275	11.1%
MT	4 133	6 257	8 648	9 920	11 061	11.5%
NL	85 562	105 328	118 069	111 993	98 541	-12.0%
NO	71 741	105 618	127 071	151 107	158 626	5.0%
PL	0	0	0	254	2 985	1 077.0%
RU	2 220	2 837	3 140	3 507	3 568	1.7%
SE	164 899	191 433	234 637	266 874	263 102	-1.4%
SK	0	0	0	0	42	–
Total EUR 27	1 079 624	1 508 816	1 602 481	1 694 188	1 723 739	1.7%
Total EUR	1 183 971	1 776 070	2 012 107	2 117 307	2 184 208	3.2%

➥ IHS Screen Digest

Satellite television

Continuing a trend of ongoing consolidation over recent years, the satellite market in Europe has seen an additional number of mergers and acquisitions, expanding the influence of already strong players. Many of these operate as pan-European companies (table 2.10). 21st Century Fox (formerly News Corporation) is one of the most important with satellite packages established in three of the largest European states and a combined subscriber base of almost half of all the satellite pay TV subscribers in the European Union (more than 19m subscribers from the EU total of over 41.5m, see tables T2.10 and T2.12). The company owns Sky (Ireland and the UK) and is the controlling shareholder of the British Sky Broadcasting Group plc (BSkyB) which in September 2014 received approval from the European Commission to acquire Sky Deutschland and Sky Italia from the 21st Century Fox group.

In the Nordic states, Viasat AS (Modern Times Group) provides services in Denmark, Finland, Norway and Sweden, and also in the three Baltic States (with an estimated 900 000 subscribers). Canal Digital (Telenor) also provides services for the Nordic states (more than 1 million subscribers). The M7 Group is active in Austria, Belgium, the Czech Republic, Luxembourg, the Netherlands, the Slovak Republic and most recently also in Hungary with the launch of AustriaSat Magyarország in March 2014.

Liberty Global (UPC Direct, FocusSat and freeSAT) is a significant player in the markets of central and south-eastern Europe, as is Deutsche Telekom. The first provides services to about 750 000 homes in the Czech and Slovak Republics, Hungary and Romania and the latter has a presence in the Czech Republic, Croatia, Hungary, Slovakia, Romania and Greece. Via the 40% share that Deutsche Telekom holds in OTE Greece, a new branding took place of Romanian Romtelecom in September 2014 and a merger with Cosmote. As part of the rebranding Romtelecom becomes Telekom Romania Communications.

The Romanian company RCS&RDS has gradually been divesting its satellite package (DigiTV). The Slovak version was bought in 2013 by Slovak Telekom. The Croatian version was bought by Telekom Austria (B.Net) in 2013. RCS&RDS continues to provide services in the Czech Republic, Hungary and Romania. Mid Europa Partners has also been divesting its satellite (and other media interests) in the region. The Croatian Total TV package was sold in 2011 to the Austrian Group Bewag. Mid Europa partners also sold the SBB/ Telemach Group (owners of Total TV in the region) in March 2014 to

Télévision par satellite

Poursuivant sa tendance à la consolidation des dernières années, le marché du satellite en Europe a connu de nouvelles fusions et acquisitions, étendant ainsi l'influence d'acteurs déjà puissants. Plusieurs d'entre eux sont des sociétés paneuropéennes (tableau T.2.10). 21st Century Fox (anciennement News Corporation) est l'un des plus importants : ses bouquets satellites sont présents dans trois des plus grands Etats européens et sa base d'abonnés combinée représente près de la moitié de tous les abonnés à la télévision payante par satellite de l'Union européenne (plus de 19 millions d'abonnés sur un total de 41,5 millions pour l'Union européenne, voir tableaux T2.10 et T2.12). Il possède Sky (Ireland et UK) et est l'actionnaire majoritaire de British Sky Broadcasting Group plc (BSkyB) dont l'acquisition de Sky Deutschland et Sky Italia au groupe 21st Century Fox a été autorisée par la Commission européenne en septembre 2014.

Dans les pays nordiques, Viasat AS (Modern Times Group) propose des services au Danemark, en Finlande, en Norvège, en Suède et dans les pays baltes (900 000 abonnés estimés). Canal Digital (Telenor) présente également des offres dans les pays nordiques (plus d'un million d'abonnés). Le groupe M7 est actif en Autriche, en Belgique, en République tchèque, au Luxembourg, aux Pays-Bas et en République slovaque et dernièrement aussi en Hongrie avec le lancement d'AustriaSat Magyarország en mars 2014.

Liberty Global (UPC Direct, FocusSat et freeSAT) est un acteur important sur les marchés d'Europe centrale et du sud-est, de même que Deutsche Telekom. Le premier compte environ 750 000 foyers en Républiques tchèque et slovaque, en Hongrie et en Roumanie tandis que le second est présent en République tchèque, Croatie, Hongrie, Slovaquie, Roumanie et en Grèce. Deutsche Telekom détenant 40 % d'OTE Greece, une nouvelle stratégie de marque a été adoptée pour le roumain Romtelecom en septembre 2014 et une fusion a eu lieu avec Cosmote. Dans le cadre de la nouvelle stratégie de marque, Romtelecom devient Telekom Romania Communications.

La société roumaine RCS&RDS s'est progressivement désengagée de son bouquet satellite (DigiTV). La version slovaque a été achetée en 2013 par Slovak Telekom. La version croate a été achetée par Telekom Austria (B.Net) en 2013. RCS&RDS continue de fournir des services en République tchèque, Hongrie et Roumanie. Mid Europa Partners s'est également désengagée de ses services satellites (et d'autres intérêts dans les médias) dans la région. Le bouquet croate Total TV a été vendu en 2011 au groupe autrichien Bewag. Mid Europa Partners a également

Satellitenfernsehen

Der Trend zu Konsolidierungen hat sich in Europa auch im vergangenen Jahr ungebremst fortgesetzt. Es gab eine Reihe von Fusionen und Übernahmen, eine Entwicklung, die den Einfluss von ohnehin starken Playern noch weiter verstärkt hat. Bei vielen dieser Unternehmen handelt es sich um gesamteuropäische Gruppen (Tabelle 2.10). Zu den bedeutendsten zählt 21st Century Fox (vorher News Corporation), mit Satellitenpaketen in drei der größten europäischen Länder. Auf 21st Century Fox entfällt nahezu die Hälfte der Pay-TV-Abonnenten von Satellitenfernsehen in der Europäischen Union (mehr als 19 Mio. von insgesamt 41,5 Mio. Abonnenten aus der gesamten EU, siehe Tabellen T2.10 und T2.12). Zu dem Unternehmen gehört auch Sky (Irland und Vereinigtes Königreich). Es ist außerdem der Mehrheitsaktionär der British Sky Broadcasting Group plc (BSkyB), die im September 2014 von der Europäischen Kommission grünes Licht für die Übernahme von Sky Deutschland und Sky Italia von der 21st Century Fox-Gruppe erhielt.

In den skandinavischen Ländern werden über die Satellitenplattform Viasat AS (Modern Times Group) Fernsehsender in Dänemark, Finnland, Norwegen und Schweden sowie in den baltischen Staaten übertragen (mit geschätzten 900 000 Abonnenten). Ein weiterer bedeutender Anbieter in den nordischen Ländern ist Canal Digital (Telenor) (mehr als 1 Mio. Abonnenten). Die M7-Gruppe ist aktiv in Österreich, Belgien, der Tschechischen Republik, Luxemburg, den Niederlanden der Slowakischen Republik und seit kurzem auch in Ungarn. Dort wurde im März 2014 AustriaSat Magyarország gestartet.

Liberty Global (UPC Direct, FocusSat und freeSAT) ist ein bedeutender Anbieter von Satellitenfernsehen in Mittel- und Südosteuropa, ebenso wie die Deutsche Telekom. Liberty Global versorgt etwa 750 000 Haushalte in der Tschechischen und der Slowakischen Republik, in Ungarn und in Rumänien, und die Deutsche Telekom ist präsent in der Tschechischen Republik, Kroatien, Ungarn, der Slowakei, Rumänien und Griechenland. Mit ihrer 40 %-Beteiligung an OTE Griechenland initiierte die Deutsche Telekom im September 2014 in Rumänien eine Markenfusion zwischen dem rumänischen Festnetzbetreiber Romtelecom und dem Mobilfunkanbieter Cosmote. Beide Unternehmen werden in Zukunft unter dem Namen Telekom Romania Communications geführt.

Der rumänische Mobilfunk- und Kabelanbieter RCS&RDS hat sich schrittweise von seinem Satellitenpaket getrennt (DigiTV). Die slowakische Tochter wurde 2013 an die Slovak Telekom verkauft, the United Group (KKR). In Russia, the sale of a 50% stake in Kosmos-TV held by government-owned Russian Television & Radio Broadcasting Network (RTRS) was authorised in August 2014.

In the Portuguese market, the announced merger of Portugal Telecom (1.3m subscribers in 2013) and Brazilian firm Oi was challenged by speculation in autumn 2014 that Altice may wish to purchase Portugal Telecom. Digiturk, the largest pay TV operator in Turkey (3.5m subscribers in 2013), has been on sale since May 2013 with Çukurova Holding (53%) in talks with a number of companies, including Türk Telekom and D-Smart.

There is a growing involvement of telecommunications companies in the provision of satellite packages involving IPTV offers being made available over satellite, or the emergence of hybrid services that combine DTT, satellite and IPTV services via one set-top box. The main players are Deutsche Telekom (Czech Republic, Germany, Greece, Croatia, Hungary, the Slovak Republic and Romania) and France Télécom (France, Romania and Poland). Telekom Austria is active via subsidiary B.Net in Croatia, and also in Bulgaria via Mobiltel.

In 2014, Eutelstat was distributing 5,700 channels of which 580 were HD. At the same time SES Astra claimed to be distributing 2,359 channels in Europe, of which nearly 500 were HD. Subscribers to HD packages continue to grow. Sky Deutschland claimed 2.1 million HD customers at the end of 2013, while the HD+ from SES exceeded 1.5 million in early 2014. In Poland, Cyfrowy Polsat stated that it had more than 2 million subscribers to the services at the end of 2013. Sky UK claimed more than 5 million HD customers by the end of 2013.

vendu le groupe SBB/Telemach (propriétaire de Total TV dans la région) en mars 2014 à United Group (KKR). En Russie, Russian Television & Radio Broadcasting Network (RTRS), propriété du gouvernement, a été autorisé en août 2014 à vendre la part de 50 % qu'il détenait dans Kosmos-TV.

Sur le marché portugais, la fusion annoncée de Portugal Telecom (1,3 million d'abonnés en 2013) et de la société brésilienne Oi a été remise en question à l'automne 2014, Altice semblant vouloir acquérir Portugal Telecom. Digiturk, principal opérateur de télévision payante en Turquie (3,5 millions d'abonnés en 2013), est en vente depuis mai 2013. A ces fins, Çukurova Holding (qui détient 53 % des parts) est en pourparlers avec plusieurs sociétés, notamment Türk Telekom et D-Smart.

Les entreprises de télécommunications s'impliquent de plus en plus dans la fourniture de bouquets satellites impliquant des offres IPTV mises à disposition sur satellite, ou l'émergence de services hybrides qui combinent les services TNT, satellites et IPTV via un décodeur unique. Les principaux acteurs sont : Deutsche Telekom (République tchèque, Allemagne, Grèce, Croatie, Hongrie et République slovaque) et France Télécom (France, Roumanie et Pologne). Telekom Austria est active via sa filiale B.Net en Croatie ainsi qu'en Bulgarie via Mobiltel.

En 2014, Eutelsat distribuait 5 700 chaînes dont 580 étaient HD. Dans le même temps, SES Astra comptait 2 359 chaînes en Europe, dont près de 500 HD. Le nombre d'abonnés aux bouquets HD continue d'augmenter. Sky Deutschland a annoncé 2,1 millions de clients HD fin 2013, tandis que le service HD+ de SES dépassait 1,5 million début 2014. En Pologne, Cyfrowy Polsat a déclaré compter plus de 2 millions d'abonnés à ses services fin 2013. Sky UK a annoncé plus de 5 millions de clients HD à la fin 2013.

die kroatische Tochter wurde im gleichen Jahr von Telekom Austria (B.Net) übernommen. RCS&RDS ist noch aktiv in der Tschechischen Republik, Ungarn und Rumänien. Auch das britische Unternehmen Mid Europa Partners hat sich von seinem Satellitenpaket getrennt (und von weiteren Medieninteressen). Das kroatische Total TV-Paket wurde 2011 an die österreichische Gruppe Bewag verkauft. Im März 2014 haben Mid Europa partners die SBB/Telemach-Gruppe (zu der Total TV in der Region gehört) an die United Group (KKR) verkauft. In Russland wurde im August 2014 der Verkauf eines 50 %igen Anteils an der Kosmos-TV genehmigt, der sich im Besitz des staatlichen Russian Television & Radio Broadcasting Network (RTRS) befindet.

In Portugal kam es im Zusammenhang mit der angekündigten Fusion zwischen Portugal Telecom (1,3 Mio. Abonnenten 2013) und der brasilianischen Oi zu Irritationen, als im Herbst 2014 unbestätigten Gerüchten zufolge die französische Altice ein Auge auf Portugal Telecom geworfen haben soll. In der Türkei steht die Çukurova Holding (53 %) seit Mai 2013 in Verhandlungen mit einer Reihe von Unternehmen, darunter Türk Telekom und D-Smart, für den Verkauf von Digiturk, des größten Pay-TV-Anbieters in der Türkei (3,5 Mio. Abonnenten 2013).

Immer mehr Telekommunikationsunternehmen steigen in den Satellitenfernsehmarkt ein und bieten IPTV über Satellit an. Darüber hinaus gibt es inzwischen auch Hybrid-Dienste, die DVB-T, Satellitenfernsehen und IPTV über eine einzige Set-Top-Box anbieten. Marktführer in diesem Bereich sind die Deutsche Telekom (Tschechische Republik, Deutschland, Griechenland, Kroatien, Ungarn, die Slowakische Republik und Rumänien) und France Télécom (Frankreich, Rumänien und Polen). Telekom Austria ist über seine Tochter B.Net in Kroatien aktiv, und auch in Bulgarien über Mobiltel.

2014, konnten über Eutelsat 5 700 Sender empfangen werden, davon bereits 580 in HD. Eigenen Angaben zufolge bot der Konkurrent SES Astra 2 359 Sender europaweit an, davon etwa 500 im HD-Format. Die Zahl der Abonnenten von HD-Paketen wächst weiter. Laut Sky Deutschland hatte die Zahl der HD-Kunden Ende 2013 2,1 Mio. erreicht, bei SES Astra überstieg die Zahl der HD-Abonnenten Anfang 2014 die 1,5 Mio. Grenze. In Polen gab Cyfrowy Polsat bekannt, dass die Zahl der HD-Abonnenten Ende 2013 auf über 2 Mio. angewachsen war. Sky UK hatte Ende 2013 eigenen Angaben zufolge mehr als 5 Mio. HD-Kunden.

➥ European Audiovisual Observatory

T.2.9 G.2.3

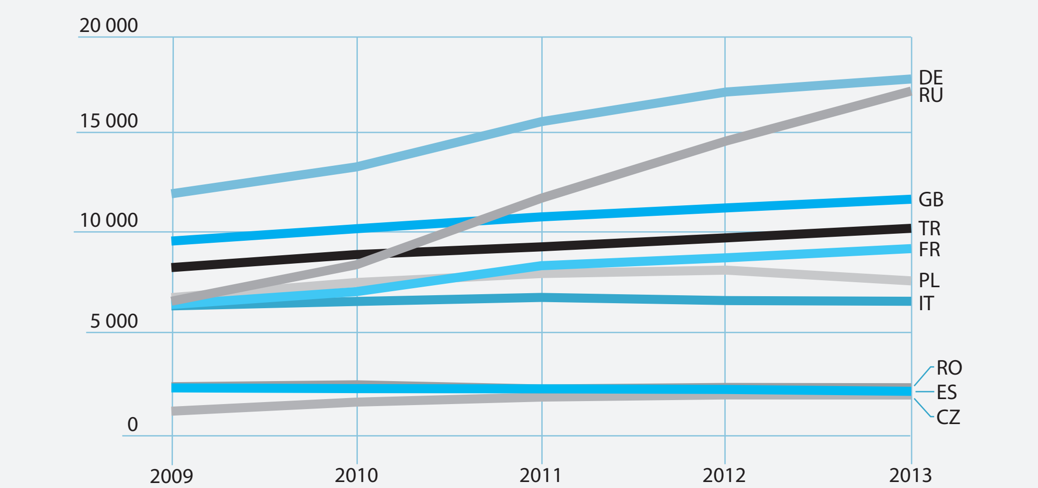
Total digital DTH satellite households (free and pay) in Europe

2009-2013 Primary homes only. In thousands.

Country	2009	2010	2011	2012	2013	2013/12
AM	3	6	8	11	15	33.1%
AT	1 760	1 772	1 780	1 806	1 813	0.4%
BE	227	302	278	286	273	-4.5%
BG	631	748	897	1 033	1 097	6.2%
CH	262	274	250	261	261	-0.3%
CY	19	19	14	13	13	-1.9%
CZ	1 229	1 683	1 935	2 044	2 040	-0.2%
DE	12 120	13 466	15 733	17 220	17 872	3.8%
DK	414	376	324	277	240	-13.4%
EE	83	83	85	86	76	-11.7%
ES	2 396	2 360	2 349	2 318	2 224	-4.1%
FI	151	151	121	114	114	-0.3%
FR	6 572	7 218	8 517	8 913	9 374	5.2%
GB	9 752	10 370	10 963	11 413	11 848	3.8%
GR	491	530	690	758	928	22.5%
HR	213	199	194	196	226	15.2%
HU	851	976	1 040	1 033	1 048	1.4%
IE	680	778	850	865	918	6.2%
IT	6 505	6 726	6 928	6 770	6 735	-0.5%
LT	107	108	117	128	127	-0.5%
LU	30	30	31	39	44	13.8%
LV	101	103	107	109	106	-2.3%
MK	4	4	5	5	19	255.9%
MT	4	4	4	4	3	-20.0%
NL	702	697	705	717	716	0.0%
NO	779	791	796	785	771	-1.7%
PL	6 920	7 675	8 125	8 296	7 758	-6.5%
PT	695	728	765	758	710	-6.3%
RO	2 454	2 550	2 343	2 419	2 404	-0.6%
RU	6 738	8 565	11 898	14 765	17 267	16.9%
SE	822	812	812	805	797	-1.0%
SI	59	61	60	60	54	-10.3%
SK	588	718	790	819	830	1.2%
TR	8 424	9 074	9 461	9 912	10 390	4.8%
EUR 28	56 579	61 242	66 557	69 298	70 388	1.6%
EUR	72 788	79 956	88 975	95 038	99 111	4.3%

No data for Albania, Bosnia and Herzegovina, Iceland and Liechtenstein.

IHS



2009-2013 In thousands.

T.2.10 Satellite TV packagers in Europe
December 2014

Country of establishment	Company	Group	Name of the service	Date of launch	Number of TV channels	Number of HD channels	Countries of reception	Number of DTH subscribers (thousand)
AL	Albanian Satellite Communications		Tring Digital	2008	47	2	AL	100 (*est.* 12.2013)
	DigitAlb	Top Media Group	DigitAlb	2004	75	17	AL	300 (12.2013 Albania and Europe)
AT	ORF	ORF	ORF Digital	1997	44	13	AT	1 500 (12.2013)
BA	Total TV BH d.o.o.	The United Group (KKR) 1	Total TV (BA)	2008	164	22	BA	70 (*est.* 12.2013)
BG 2	Bulsatcom AD		Bulsatcom	2003	107	10	BG	400 (*est.* 12.2013)
	Vivacom	Vivacom	Vivacom TV	2010	92	10	BG	100 (12.2013)
	Mobiltel Ead	Telekom Austria Group		2014	150	20	BG	~
	Neterra/ Telenor	Neterra/ Telenor	W1	2013	53		BG	~
CH	SRG SSR idée suisse	SRG SSR idée suisse	Sat-Access	1997	13	6	CH	605 (12.2009)
CZ	Digi Czech Republic s.r.o.	RCS&RDS (RO)	Digi TV (CZ)	2004	56	0	CZ	190 (06.2012)
	T-Mobile Czech Republic	Deutsche Telekom AG	T-Mobile TV	2010	52	22	CZ	~
	UPC Ceska Republika a.s.	Liberty Global	freeSAT (UPC) 3	2000	212	34	CZ	104 (06.2014)
DE	Deutsche Telekom AG	Deutsche Telekom AG	Entertain Sat	2011	290	50	DE	320 (*est.* 12.2013)
	HD Plus GmbH	SES Astra SA	HD+	2010	16	16	DE	1 400 (12.2013)
	Sky Deutschland GmbH	British Sky Broadcasting Group plc 4	Sky Deutschland/ Sky Österreich	1990	81	32	AT, DE	3 813 (06.2014 in AT and DE)
DK	Canal Digital Denmark A/S	Telenor	Canal Digital	1997	124	25	DK	98 DTH + 542 SMATV (12.2012)
	ViaSat A/S Danmark	MTG (Modern Times Group)	Viasat	1991	89	19	DK	181 (*est.* 12.2011)
EE	Viasat AS Estonia	MTG (Modern Times Group)	Viasat	2004	112	8	EE	49 (*est.* 12.2010)
			Viasat	2004	54	6	LT	80 (12.2011)
			Viasat	2004	70	9	LV	70 (12.2011)
ES	DTS Distribuidora de Television Digital S.A.	Prisa/Telefonica/ Mediaset	Canal + (ex. Digital +)	1994	274	32	ES	1 700 (03.2013)
FI	Canal Digital Finland Oy	Telenor	Canal Digital	1997	79	14	FI	50 DTH + 32 SMATV (12.2012)
	Oy Viasat Finland AB	MTG (Modern Times Group)	Viasat	1991	52	17	FI	56 (*est.* 12.2011)
FR	ABSAT	Groupe AB/TF1	Bis TV	2007	89	8	FR	150 (*est.* 09.2010)
	Canal+ Distribution 5	Vivendi	Canalsat	1992	260	51	FR	4 940 (09.2014)
			Canalsat Suisse	2008	115	22	CH	12 (*est.* 12.2009)
			TNT sat	2007	60	9	FR	3 300 (12.2013)
	France Télécom	France Télécom	La TV d'Orange	2008	180	24	FR	5 000 (IPTV & Sat. 12.2013)
	Fransat S.A.S.	Eutelsat	Fransat	2009	64	4	FR	1 600 (11.2013)
	SFR	Vivendi / Vodafone	Neufbox TV Sat	2011	96	16	FR	~
GB	British Sky Broadcasting	21st Century Fox	Sky	1989	683	89	GB, IE	10 700 (09.2014 in GB and IE)
	Freesat (UK) Ltd	BBC/ITV Plc joint venture	Freesat	2008	137	5	GB, IE	1 900 (09.2014)
GR	Multichoice Hellas	Forthnet group	Nova	1999	78	9	CY, GR	500 (09.2014)
	Hellenic Telecommunications Organization S.A.	Deutsche Telekom	OTE TV	2011	83	18	GR	295 (09.2014) 6

T.2.10

Satellite TV packagers in Europe

December 2014

continued

Country of esta-blish-ment	Company	Group	Name of the service	Date of launch	Number of TV channels	Number of HD channels	Countries of reception	Number of DTH subscribers (thousand)
HR	B.Net	Telekom Austria	Total TV [7]	2008	190	29	HR	10 (*est.* 12.2011)
	B.Net	Telekom Austria	Vip Sat TV [8]	2009 /2012	68		HR	70 (*est.* 12.2011)
	T-HT D.D.	Deutsche Telekom AG	MAXtv Sat	2010	77	4	HR	340 (IPTV and Satellite 12.2012)
HU	Digi Tavkozlesi Kft	RCS&RDS (RO)	Digi TV (HU)	2004	105	6	HU	445 (*est.* 12.2013)
	HD Platform Kft	British Watchcable Ltd	Hello HD	2008	53	12	HU	37 (12.2013)
	Magyar Telekom	Deutsche Telekom	T-Home	2009	106	9	HU	291 (*est.* 12.2013)
	UPC Magyarország	Liberty Global	UPC Direct	2000	156	18	HU	269 (06.2014)
	M70 Group Kft	M7 Group	AustriaSat Magyarország	2014	55	11	HU	~
IT	Sky Italia	British Sky Broadcasting Group plc [5]	Sky Italia	2003	373	59	IT	4 760 (06.2013)
	TIVU SRL	Rai, Mediaset, Telecom Italia Media, Confindustria Radio TV, Aeranti Corallo	Tivusat	2009	62	3	IT	1 800 (03.2013)
LU	M7 Group S.A.	M7 Group	TéléSat Numérique	2008	89	3	BE (CFB)	110 (TV Vlaanderen+ TéléSat *est.* 12.2012)
			TV Vlaanderen	2006	244	15	BE (VLG)	
			TéléSat Luxembourg	2010	58	0	LU	~
			Austria Sat	2010	27	13	AT	10 (*est.* 03.2011)
			HD Austria	2011	13	13	AT	~
			Canal Digitaal	1996	314	48	NL	798 (12.2011)
			CS Link (Towercom)	2006	72	4	CZ, SK	1 600 (12.2013 for both CS Link and Skylink) in both CZ and SK
			Skylink	2007	110	35	CZ, SK	
ME	Total TV Montengro	The United Group (KKR) [1]	Total TV (ME)	2007	189	28	ME	43 (12.2012)
MK	Total TV Ltd	The United Group (KKR) [1]	Total TV (MK)	2009	159	26	MK	1 (*est.* 12.2012)
NO	Canal Digital Norge AS	Telenor	Canal Digital	1997	87	21	NO	524 (12.2012)
	Viasat AS Norge	MTG (Modern Times Group)	Viasat	1991	66	16	NO	143 (*est.* 12.2011)
PL	Canal+ Cyfrowy S.A.	Vivendi	nC+ [9]	2013	281	51	PL	2 200 (12.2013)
			TNK (Telewizja na karte)	2009	134	42	PL	322 (12.2011)
	Polsat Cyfrowy SP Z.O.O.	Polsat	Cyfrowy Polsat	1999	153	38	PL	3 570 (12.2013)
	Telekomunikacja Polska S.A.	France Telecom	Orange Polska	2008	155	40	PL	591 (06.2014)
	Telewizja Polska S.A.		TVP	2009	13	4	PL	~
PT	Portugal Telecom [10]	Portugal Telecom	Meo Satélite	2008	92	9	PT	1 200 (12.2013) [6]
	Zon TV Cabo	Zon Multimedia	Zon TV Satélite	1994	81	17	PT	340 (06.2013)
RO	Romtelecom (Telekom Romania Communications) [11]	OTE (Deutsche Telekom)	Dolce / Telekom Romania Televiziune	2006	113	8	RO	1 080 (*est.*12.2013)
	Focus Sat Romania	Liberty Global	Focus Sat [3]	2004	91	6	RO	306 (06.2014)
	RCS&RDS	RCS&RDS	Digi TV (RO)	2004	85	1	RO	1 000 (*est.* 09.2011)
	Orange Romania	France Telecom	Orange Romania	2013	49	16	RO	110 (09.2014)
	Eutelsat	Eutelsat	Freesat Romania	2013	17	1	RO	~

T.2.10

Satellite TV packagers in Europe
December 2013

continued

Country of esta-blish-ment	Company	Group	Name of the service	Date of launch	Number of TV channels	Number of HD channels	Countries of reception	Number of DTH subscribers (thousand)
RU	NTV-PLUS	Gazprom Media	NTV+	1998	207	25	RU	650 (*est.*12.2013)
	Orion Express	Rostelecom	Continent TV	2010	118	1	RU	2 000 (12.2013)
			Telekarta	2010	18	0	RU	
			Orient Express	2010	82	8	RU	
	Raduga TV	Raduga Holdings /MTG (Modern Times Group)	Raduga TV	2009	72	1	RU	445 (06.2014)
	Rikor TV (12)	Rikor Holding	Rikor TV Active TV	2009	60	2	RU	~
	Tricolor TV	Gazprom Media	Tricolor TV	2007	133	0	RU	15 170 (09.2014)
	ZAO Kosmos-TV	Sistema/RTRS (13)	Kosmos TV	2010	70		RU	35 000 (*est.* 08.2012)
SE	Canal Digital Sverige AB	Telenor	Canal Digital	1997	94	23	SE	307 DTH + 251 SMATV (12.2012)
	Viasat Satellite Service AB	MTG (Modern Times Group)	Viasat	1991	78	19	SE	315 (*est.* 12.2011)
SI	Total TV d.o.o.	The United Group (KKR) (1)	Total TV (Slovenia)	2007	173	26	SI	27 (*est.* 12.2013)
SK	Digi Slowakia	RCS&RDS (RO)	Digi TV	2004	57		SK	350 (12.2013)
	T-Com AS	Deutsche Telekom	Magio Sat	2010	54	3	SK	48 (12.2013)
	UPC Broadband Slovakia	Liberty Global	freeSAT (UPC) (3)	2000	175	7	SK	65 (06.2014)
TR	Digiturk	Çukurova Holding/ Providence Equity (14)	Digiturk	2000	210	36	TR	3 500 (12.2013)
	D Smart	Doğan Holding	D Smart	2007	269	44	TR	1 835 (12.2013) (15)

1. Mid Europa Partners divested their cable and satellite interests in South East Europe in 2014 to The United Group/ KKR.
2. The service "Satellite BG" (formerly Total TV) closed in June 2013 and encouraged customers to move to Vivacom.
3. Formerly known as UPC Direct, and rebranded end 2011 for Czech Republic and Slovak Republic as freeSat UPC, and as Focus Sat in Romania.
4. In September 2014, the European Commission approved the acquisition of Sky Deutschland and Sky Italia by the British Sky Broadcasting Group plc; approval of the acquisition of Sky Deutschland by German state media authorities followed in October 2014. The companies were previously owned by 21st Century Fox which was until June 2013 part of the same company as News Corp.
5. Canal+ France, through its subsidiary Canal+ Overseas, also distributes 3 satellite packages targeting overseas territories (CanalSat Réunion, Maurice, Caraibes) and several other packages targeting Africa, the Indian Ocean or Asia (CanalSat Horizons, Madagascar, Calédonie, K+ and Le bouquet de Canal+).
6. Includes IPTV and satellite homes.
7. Major shares in Total TV Package sold by Mid Europa Partners to B.NET at end of 2010. B.NET was taken over by Telekom Austria in 2011, via its company Vipnet.
8. RCS/ RDS sold its Croatian Digi TV to Vip Net/ BNET in March 2012. It was relaunched as Vip Sat TV. B.NET was taken over by Telekom Austria in 2011, via its company Vipnet.
9. nC+ was the result of the merger between the platforms N - Telewizja Nowej Generacji and Cyfra+ in March 2013. The new platform is owned by Canal+ (51%), TVN (32%) and Liberty Global (17%).
10. And the end of 2013, Portugal Telecom and Brazilian firm Oi announced their intention to merge. Although this merger is under way, in Autumn 2014 there was increasing speculation that Altice may wish to purchase Portugal Telecom.
11. Deutsche Telekom has a 40% share in OTE. Via these shares a new branding took place of Romtelecom in September 2014 and a merger with Cosmote. Romtelecom becomes Telekom Romania Communications. Both AKTA Satellite and BOOM TV were taken over by Romtelecom in 2011, and customers encouraged to move to Dolce packages from 2012.
12. In October 2014 it was announced that Orion Express will take over the subscribers of Rikor TV, expected to reach more than 2.5 million subscribers after completing the integration process.
13. A presidential decree effective 11 August 2014 authorised the sale of a 50% stake in Kosmos-TV currently held by Russian Television & Radio Broadcasting Network (RTRS) with Kosmos-TV's other 50% owner Sistema as the most likely target purchaser.
14. It was announced in April 2014, that Çukurova Holding (53%) is in talks with a number of companies, including Türk Telekom and D-Smart, to sell Digitürk. The state regulator Savings Deposit Insurance Fund of Turkey (TMSF) seized control of Digitürk in May 2013.
15. Includes paying and non-paying customers.

➡ European Audiovisual Observatory / MAVISE database / company websites and reports / regulator reports

T.2.11 Reception in Europe of the two main satellite systems 2010, 2013[1]

In thousands of HH.

	EUTELSAT 13° East (Hot Bird) & 28.1° East (Eurobird 1) Reception by:			SES ASTRA 19.2° E, 23.5° E, 28.2 E, 5.0°E and 31.5°E Reception by:			
Country	**DTH + SMATV**	**Cable**	**Total CATV+ DTH+SMATV**	**Satellite**	**Cable**	**IPTV**	**Total Satellite+ Cable+IPTV**
AL	165	205	352	~	~	~	~
AT	730	1 253	1 912	2 000	1 250	160	3 410
BA	170	219	386	120	380	110	610
BE	336	3 593	3 929	540	3 020	1 170	4 730
BG	168	1 066	1 197	170	1 350	800	2 320
CH	318	2 471	2 697	430	2 110	570	3 110
CY	35	16	48	~	~	~	~
CZ	155	418	563	1 500	1 100	140	2 740
DE	2 016	20 085	21 395	17 950	16 850	1 460	36 260
DK	200	1 134	1 334	220	1 670	210	2 100
EE	27	162	186	60	250	150	460
ES	769	1 388	2 157	2 210	1 070	650	3 930
FI	282	498	771	3	610	220	833
FR	2 099	2 964	4 824	6 000	1 930	9 210	17 140
GB	11 169	6 203	17 297	1 227	3 700	1 430	6 357
GR	656	0	656	450	0	90	540
HR	319	174	481	90	190	340	620
HU	146	2 078	2 215	340	1 890	480	2 710
IE	799	744	1 543	1 020	360	30	1 410
IT	7 026	0	7 026	1 900	0	80	1 980
LT	75	500	574	140	480	90	710
LU	~	~	~	60	130	10	200
LV	67	253	318	90	270	150	510
NL	260	5 576	5 705	470	5 050	1 490	7 010
NO	215	811	1 020	340	1 010	150	1 500
PL	6 157	4 421	10 119	2 650	3 850	150	6 650
PT	242	1 418	1 660	200	990	530	1 720
RO	298	3 460	3 758	240	4 640	170	5 050
RU	1 365	4 019	5 384	~	~	~	~
SE	315	2 331	2 572	480	1 820	460	2 760
SI	84	351	421	30	250	260	540
SK	60	415	475	780	680	100	1 560
TR	2 739	1 245	3 979	~	~	~	~
EUR 27	**34 341**	**60 546**	**93 041**	**40 730**	**53 210**	**19 690**	**113 630**
European States non-members of the European Audiovisual Observatory							
BY	122	290	393	230	1 200	430	1 860
RS	97	786	848	160	960	120	1 240
UA		875	2 937	3 812	4 400	5 900	80
Non-European States							
DZ	4 354	0	4 354	3 340	0	0	3 340
EG	5 433	0	5 433	~	~	~	~
IL	276	819	1 091	~	~	~	~
JO	340	0	340	~	~	~	~
LB	755	2	755	~	~	~	~
MA	2 758	0	2 758	2 690	0	0	2 690
SA	1 845	0	1 845	~	~	~	~
SY	1 639	0	1 639	~	~	~	~
TN	1 698	0	1 698	1 230	0	0	1 230

[1] Eutelsat data for 2010/ SES data for 2013.
No data for Cyprus, Iceland, Liechtenstein, "The former Yugoslav Republic of Macedonia" and Malta.

➡ EUTELSAT & SES Satellite Monitor year End 2013

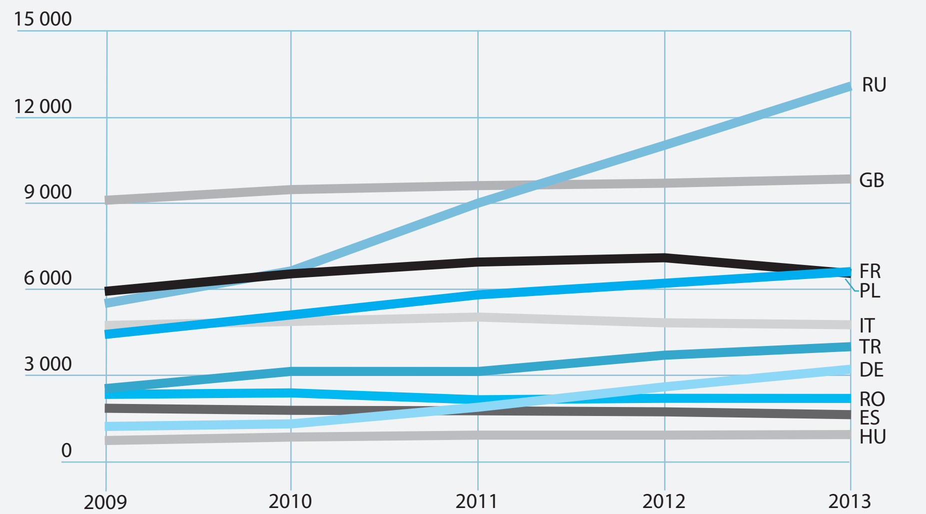
T.2.12 G.2.4

Number of satellite pay TV subscribers in Europe

2009-2013 In thousands.

Country	2009	2010	2011	2012	2013	2013/12
AT	0	7	32	66	91	37.9%
BE	100	119	144	166	172	3.6%
BG	445	500	605	712	766	7.6%
CH	10	10	10	11	11	2.9%
CY	12	12	7	5	5	-5.0%
CZ	515	548	548	593	580	-2.3%
DE	1 209	1 300	1 880	2 593	3 209	23.8%
DK	348	296	274	243	213	-12.3%
EE	48	49	53	54	45	-16.8%
ES	1 846	1 773	1 756	1 720	1 621	-5.8%
FI	91	89	64	61	64	5.6%
FR	4 423	5 105	5 806	6 212	6 618	6.5%
GB	9 109	9 482	9 621	9 705	9 855	1.5%
GR	319	364	397	464	636	37.0%
HR	68	61	60	64	93	45.3%
HU	718	838	906	906	926	2.1%
IE	599	614	632	653	681	4.3%
IT	4 737	4 877	5 030	4 830	4 760	-1.4%
LT	75	79	89	101	101	-0.2%
LV	66	69	74	77	75	-2.0%
MK	1	1	1	1	15	1 014.2%
NL	830	821	772	764	754	-1.3%
NO	691	666	655	637	615	-3.5%
PL	5 928	6 541	6 951	7 102	6 554	-7.7%
PT	614	639	667	660	612	-7.3%
RO	2 329	2 381	2 142	2 193	2 188	-0.2%
RU	5 504	6 645	9 008	11 030	13 102	18.8%
SE	660	652	648	642	636	-1.0%
SI	21	24	25	27	27	0.0%
SK	332	409	436	445	470	5.4%
TR	2 531	3 133	3 129	3 698	3 996	8.1%
EUR 28	35 440	37 647	39 619	41 057	41 750	1.7%
EUR	44 177	48 101	52 424	56 435	59 488	5.4%

IHS



2009-2013 In thousands.

T.2.13
G.2.5

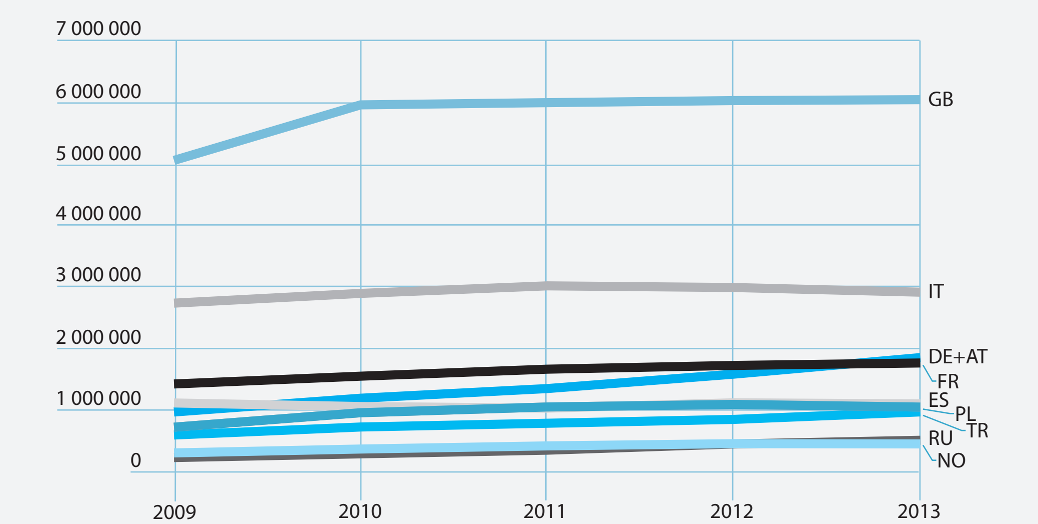
Consumer expenditures for pay satellite audiovisual services

2009-2013 EUR thousand. Including transactional services, NVoD and VoD.

Country	2009	2010	2011	2012	2013	2013/12
AT ❶			2 055	5 496	9 933	44.7%
BE	12 013	16 410	22 251	25 262	28 745	12.1%
BG	40 476	43 596	53 660	68 744	67 307	-2.1%
CY	6 827	5 592	4 243	2 516	2 091	-20.3%
CZ	98 238	103 845	106 245	101 987	97 508	-4.6%
DE/AT ❶	958 510	1 182 722	1 339 811	1 574 626	1 844 535	14.6%
DK	181 748	172 977	163 262	156 784	152 930	-2.5%
EE	10 730	11 149	10 476	9 513	9 044	-5.2%
ES	1 107 359	1 049 692	1 023 433	1 110 170	1 092 790	-1.6%
FI	43 263	47 108	42 829	38 170	39 971	4.5%
FR	1 416 876	1 543 712	1 657 737	1 718 582	1 758 724	2.3%
GB	5 058 127	5 962 098	5 998 142	6 032 016	6 046 942	0.2%
GR	204 936	224 000	187 409	180 936	206 897	12.5%
HR	6 630	6 136	6 514	8 130	11 887	31.6%
HU	72 629	85 903	98 374	102 212	104 942	2.6%
IE	259 419	320 550	373 820	392 606	427 450	8.2%
IT	2 733 270	2 891 962	3 014 745	2 987 733	2 911 706	-2.6%
LT	11 531	11 275	12 732	14 793	16 062	7.9%
LV	8 395	7 747	8 819	9 678	10 020	3.4%
NL	104 427	108 680	112 937	117 893	121 131	2.7%
NO	294 039	357 205	408 299	444 688	440 543	-0.9%
PL	713 183	948 617	1 041 949	1 084 324	1 041 059	-4.2%
PT	182 257	190 539	198 673	201 472	191 315	-5.3%
RO	163 373	172 937	176 221	164 266	173 833	5.5%
RU	218 401	278 829	338 557	439 716	499 882	12.0%
SE	204 956	234 753	263 491	282 008	302 959	6.9%
SI	6 030	7 839	9 061	10 275	11 123	7.6%
SK	50 495	60 623	68 973	73 448	74 643	1.6%
TR	585 774	716 075	777 342	839 861	961 904	12.7%
EUR 28	13 655 700	15 410 461	15 997 866	16 473 639	16 755 547	1.7%
EUR	14 535 512	16 483 741	17 183 507	17 758 188	18 157 994	2.2%

❶ Data for Austria are partly included in Germany.

➥ IHS



2009-2013 EUR million.

The European cable market experienced further consolidation in 2014, which also reflected an ongoing convergence of ownership between telecommunications firms and cable operators.

A major player in this consolidation process is the American group Liberty Global, which took over German operators Kabel BW (2011) and Unity Media (2009). The two companies merged to form Unity Media KabelBW GmbH with a combined 6.6 million customers in 2013. The German market is now dominated by three main players that include Kabel Deutschland, the merged UnityMedia KabelBW GmbH, and Telecolumbus. In February 2013 Germany's competition authority rejected a takeover of Telecolumbus by Kabel Deutschland. In October 2013, Kabel Deutschland was itself taken over by telecommunications operator Vodafone.

Liberty Global's expansion in the cable markets also included the takeover of the Virgin Media cable service in the UK in 2013. Liberty Global plc was established in the UK in 2013. It has increased its share in the Belgian company Telenet and announced a merger in January 2014 with Ziggo in the Netherlands. This merger was cleared by the European Commission's DG Competition in October 2014. Liberty Global claimed almost 20 million subscribers in Europe by the end of 2013, of which more than 60% were digital. At the end of 2013 (according to data from IHS) there were more than 80 million cable households in 37 of the countries dealt with in this Yearbook (where such data is available). This provides an indication of the share of the cable market held by the company. At the same time, Liberty Global also divested most of its television broadcasting interests in 2013, by selling the Chellomedia channels to the US company AMC Networks. It retained the Belgian Telenet channels.

Regarding Vodafone, following the takeover of Kabel Deutschland in 2013, the company also completed the acquisition of the Spanish cable operator ONO in July 2014. This development in cross-over of ownership between telecommunications and cable companies reflects the battle for provision of access to broadband and can also be seen as a response to the entry of over-the-top (OTT) services (in particular Netflix) to the market. In France the planned takeover of the telecommunications company SFR (Vivendi) by cable operator Numéricable was authorised under certain conditions by the French authorities in November 2014. Telekom Austria is also playing an increasingly important role in the cable sector in South Eastern Europe (with B.net and Optika in Croatia and the 2014 takeover of the Macedonian Blizoo cable operator).

La consolidation du marché européen du câble s'est poursuivie en 2014, reflétant également la convergence de propriété entre entreprises de télécommunications et câblo-opérateurs.

Un acteur majeur de ce processus de consolidation est le groupe américain Liberty Global, qui a repris les opérateurs allemands Kabel BW (2011) et Unity Media (2009). Les deux entreprises ont fusionné pour former UnityMedia KabelBW GmbH qui revendique 6,6 millions de clients en 2013. Le marché allemand est désormais dominé par trois principaux acteurs : Kabel Deutschland, la nouvelle entité fusionnée UnityMedia KabelBW GmbH et TeleColumbus. En février 2013, l'autorité de la concurrence allemande a rejeté la reprise de TeleColumbus par Kabel Deutschland. En octobre 2013, Kabel Deutschland a elle-même été reprise par l'opérateur de télécommunications Vodafone.

L'expansion de Liberty Global sur les marchés du câble inclut également la reprise du service de câble de Virgin Media au Royaume-Uni, achevée en 2013. Liberty Global plc a été créée au Royaume-Uni en 2013. Elle a augmenté sa participation dans la société belge Telenet et, en janvier 2014, annoncé sa fusion avec Ziggo aux Pays-Bas. Cette fusion a été autorisée par la DG Concurrence de la Commission européenne en octobre 2014. Liberty Global revendique près de 20 millions d'abonnés en Europe fin 2013, dont plus de 60 % à des services numériques. Fin 2013 (selon les données d'IHS), les 37 pays couverts par cet Annuaire (pour lesquels ces données sont disponibles) comptent au total plus de 80 millions de foyers câblés. Cela donne une indication de la part du marché du câble détenue par la société. Dans le même temps, Liberty Global a cédé en 2013 la plupart des intérêts qu'elle détenait dans la radiodiffusion télévisuelle, en vendant les chaînes Chellomedia à la société américaine AMC Networks. Elle a conservé les chaînes belges éditées par Telenet.

Après le rachat de Kabel Deutschland en 2013, Vodafone a finalisé l'acquisition du câblo-opérateur espagnol ONO en juillet 2014. Ce développement de la propriété croisée entre sociétés de télécommunications et câblo-opérateurs témoigne de la bataille dans le secteur de l'accès au haut débit et peut apparaître comme une réponse à l'arrivée sur le marché des services OTT (télévision distribuée sur internet) (notamment Netflix). En France, le projet de rachat de la société de télécommunications SFR (Vivendi) par le câblo-opérateur Numéricable est, en novembre 2014, autorisée, sous conditions, par l'Autorité française de la concurrence. Telekom Austria joue également un rôle croissant dans le secteur du câble en Europe du Sud-Est (avec B.net et Optika

Der Konsolidierungsprozess auf dem europäischen Kabelmarkt ist 2014 unvermindert weitergegangen. In diesem Prozess spiegelt sich auch ein europaweiter Branchentrend einer Fusionswelle unter Telekom- und Kabelnetzkonzernen wider.

Eine wichtige Rolle in diesem Konsolidierungsprozess spielt der amerikanische Kabelriese Liberty Global, der die deutschen Kabelkonzerne Kabel BW (2011) und Unity Media (2009) übernommen hat. Beide Anbieter sind zur UnityMedia KabelBW GmbH zusammengeschlossen. Damit stieg die Zahl der Kunden 2013 auf 6,6 Mio. an. Dominiert wird der deutsche Markt von drei Anbietern: Kabel Deutschland, Unity Media KabelBW GmbH und Telecolumbus. Im Februar 2013 untersagte das Bundeskartellamt die Übernahme von Telecolumbus durch Kabel Deutschland. Im Oktober 2013 wurde Kabel Deutschland selbst vom britischen Telekomkonzern Vodafone übernommen.

Liberty Global setzt seine Expansion auf dem Kabelmarkt in Europa fort und hat 2013 auch Virgin Media im Vereinigten Königreich übernommen. 2013 wurde Liberty Global plc im Vereinigten Königreich gegründet. Die Gruppe hat ihre Anteile an der belgischen Telenet erhöht und im Januar 2014 die Übernahme des niederländischen Kabelanbieters Ziggo angekündigt. Diese Fusion wurde im Oktober 2014 von der GD Wettbewerb der Europäischen Kommission unter Auflagen genehmigt. Eigenen Angaben zufolge hatte Liberty Global Ende 2013 fast 20 Mio. Abonnenten in Europa, davon konnten mehr als 60 % digitales Kabelfernsehen empfangen. Die Zahl der Kabelfernsehhaushalte lag Ende 2013 (laut IHS) in 37 der Länder, die in diesem Jahrbuch behandelt werden (wo solche Daten vorliegen), bei über 80 Mio. Daraus wird deutlich, wie hoch der Marktanteil von Liberty Global am europäischen Kabelfernsehmarkt ist. Gleichzeitig hat Liberty Global sich 2013 von einem Großteil seiner internationalen Sparte getrennt und die Chellomedia-Sender an den US-Konzern AMC Networks verkauft. Liberty Global behielt jedoch jene Dienste, die in Belgien durch Telenet angeboten werden.

Nur wenige Monate nach der Übernahme von Kabel Deutschland 2013 hat der britische Telekomkonzern Vodafone im Juli 2014 die Übernahme des größten spanischen Kabelkonzerns ONO abgeschlossen. Dieser Trend zu Fusionen zwischen Telekommunikations- und Kabelunternehmen spiegelt den Kampf um den Breitbandzugang wider und kann auch als eine Reaktion auf den Markteintritt von Over-the-top (OTT)-Anbietern (vor allem Netflix) gesehen werden. In Frankreich wurde die Übernahme des Telekommunikationsunternehmens SFR (Vivendi) durch

Latvia's two main cable providers Baltcom and Izzi also merged in 2013. In 2014, the Maltese telecommunications operator, GO, acquired 25% of the Cypriot cable and broadband operator Cablenet.

Meanwhile, in 2014 Mid Europa Partners divested its cable interests in South Eastern Europe (Bosnia and Herzegovina, Slovenia, Serbia) with the sale of SBB/Telemach (The United Group) to US equity firm Kohlberg Kravis Roberts & Co. LP ("KKR"). All these events follow a range of consolidation activities in the European cable markets in recent years including in Belgium, Bulgaria, Denmark, Finland, Lithuania, Luxembourg, Poland and Romania.

The most recent data from IHS shows that cable services delivered television to almost 60 million homes in the European Union and over 80 million homes in Europe in 2013 (T.2.14). More than 50% of cabled households in the EU (44% in Europe as a whole) were digitised at the end of 2013.

The digitisation of cable is vital for the provision of broadband, and of interactive and on-demand services. Cable operators are providing more than 70 of their own on-demand services throughout Europe. Digital services also provide access to high definition channels (T.2.16). The MAVISE database shows that 45 or more HD channels are provided over digital cable by operators in Switzerland, Denmark, France, Germany, Norway and Poland.

Cable networks in Finland, the United Kingdom and Luxembourg have been fully digitised. At the end of 2013 the cable network digitisation rate also exceeded 85% in Ireland, Portugal, Slovenia and Spain. Digital services were available in more than 70% of cable homes in Bulgaria, the Netherlands, Norway and Malta. On the other hand, the level of digitisation of cable services is still below 40% in nine European countries (France, Germany, Hungary, Lithuania, Romania, Slovakia, Sweden, Russia and the "Former Yugoslav Republic of Macedonia"). It should be noted that with regard to access to broadband (see G.2.10) cable plays a very minor role in France and Germany (and in Latvia, Lithuania and Sweden where fibre to the home (FTTH) is very well developed).

en Croatie et la reprise en 2014 du câblo-opérateur Blizoo en Macédoine). Les deux principaux câblo-opérateurs de Lettonie, Baltcom et Izzi, ont également fusionné en 2013. En 2014, l'opérateur de télécommunications maltais, GO, a acquis 25 % du câblo-opérateur haut débit chypriote Cablenet.

Dans le même temps, en 2014, Mid Europa Partners a cédé ses intérêts dans le câble en Europe du Sud-Est (Bosnie-Herzégovine, Slovénie, Serbie) en vendant SBB/Telemach (The United Group) au fonds de placement américain Kohlberg Kravis Roberts & Co. LP (KKR). Tous ces événements suivent une série d'activités de consolidation sur les marchés européens du câble au cours des dernières années, y compris en Belgique, en Bulgarie, au Danemark, en Finlande, en Lituanie, au Luxembourg, en Pologne et en Roumanie.

Les données les plus récentes fournies par IHS indiquent que la télévision par câble est reçue par près de 60 millions de foyers dans l'Union européenne et plus de 80 millions de foyers en Europe en 2013 (voir T.2.14). Plus de 50 % des foyers câblés de l'UE (44 % de l'Europe dans son ensemble) sont numérisés fin 2013.

La numérisation du câble est vitale pour la fourniture de services haut débit ainsi que de services interactifs et à la demande. Les câblo-opérateurs européens fournissent plus de 70 de leurs propres services à la demande dans toute l'Europe. Les services numériques permettent également d'accéder aux chaînes haute définition (voir T.2.16). La base de données MAVISE montre que 45 chaînes HD ou plus sont fournies sur le câble numérique par les opérateurs en Suisse, au Danemark, en France, en Allemagne, en Norvège et en Pologne.

Les réseaux câblés en Finlande, au Royaume-Uni et au Luxembourg sont entièrement numérisés. Fin 2013, le taux de numérisation du réseau câblé dépasse également les 85 % en Irlande, au Portugal, en Slovénie et en Espagne. Des services numériques sont disponibles dans plus de 70 % des foyers câblés en Bulgarie, aux Pays-Bas, en Norvège et à Malte. En revanche, le niveau de numérisation des services de câblodistribution reste inférieur à 40 % dans neuf pays européens (France, Allemagne, Hongrie, Lituanie, Roumanie, Slovaquie, Suède, Russie et « ex-République yougoslave de Macédoine »). Il convient de noter qu'en ce qui concerne l'accès au haut débit (voir G.2.10) le câble joue un rôle mineur en France et en Allemagne – ainsi qu'en Lettonie, Lituanie et Suède où la desserte par fibre jusqu'à l'abonné (DFA) est très développée.

den Kabelanbieter Numéricable von der französischen Wettbewerbsbehörde unter Auflagen im November 2014 genehmigt. In Südosteuropa spielt Telekom Austria eine immer wichtigere Rolle auf dem Kabelsektor (mit B.net und Optika in Kroatien und der Übernahme des mazedonischen Kabelanbieters Blizoo 2014). Die beiden größten Kabelanbieter in Lettland, Baltcom und Izzi, haben sich 2013 ebenfalls zusammengeschlossen. 2014 hat der maltesische Telekommunikationsanbieter GO 25 % des zyprischen Kabel- und Breitbandbetreibers Cablenet übernommen.

2014 hat sich die britische Mid Europa Partners aus dem Kabelnetzmarkt in Südosteuropa (Bosnien und Herzegowina, Slowenien, Serbien) zurückgezogen und die SBB/Telemach-Gruppe (The United Group) an den US-Investor Kohlberg Kravis Roberts & Co. LP („KKR") verkauft. Fusionen sind ebenfalls ein allgemeiner Trend auf dem europäischen Kabelfernsehmarkt in Ländern wie Belgien, Bulgarien, Dänemark, Finnland, Litauen, Luxemburg, Polen und Rumänien.

Aus den jüngsten IHS-Daten geht hervor, dass 2013 fast 60 Mio. Haushalte in der Europäischen Union Fernsehen über Kabel empfingen, in Europa waren es sogar mehr als 80 Mio. (Tabelle 2.14). Mehr als 50 % der Kabelhaushalte in der EU (44 % in Europa insgesamt) waren Ende 2013 digitalisiert.

Die Digitalisierung der Kabelnetze ist eine wichtige Voraussetzung für die Einführung von Breitbandanschlüssen und von interaktiven Diensten sowie Abrufdiensten. Inzwischen bieten bereits mehr als 70 europäische Kabelkonzerne ihre eigenen On-Demand-Dienste an. Digitale Dienste bieten auch Zugang zu HD-Kanälen (Tabelle 2.16). Die Datenbank MAVISE zeigt, dass mehr als 45 HD-Sender über Digitalkabel in der Schweiz, Dänemark, Frankreich, Deutschland, Norwegen und Polen angeboten werden.

Die Kabelnetze in Finnland, dem Vereinigten Königreich und Luxemburg sind vollständig digitalisiert. In Irland, Portugal, Slowenien und Spanien waren es Ende 2013 mehr als 85 %. In Bulgarien, den Niederlanden, Norwegen und Malta konnten mehr als 70 % der Kabelhaushalte digitale Dienste nutzen. In neun europäischen Ländern liegt die Digitalisierungsrate allerdings noch unter 40 % (Frankreich, Deutschland, Ungarn, Litauen, Rumänien, der Slowakei, Schweden, Russland und der Ehemaligen jugoslawischen Republik Mazedonien). Allerdings spielt Kabel beim Breitbandzugang (siehe G.2.10) in Frankreich und Deutschland (ebenso wie in Lettland, Litauen und Schweden) eine sehr geringe Rolle. In diesen Ländern ist der Netzausbau mit FTTH (fibre-to-the-home) bereits weit fortgeschritten.

➥ European Audiovisual Observatory

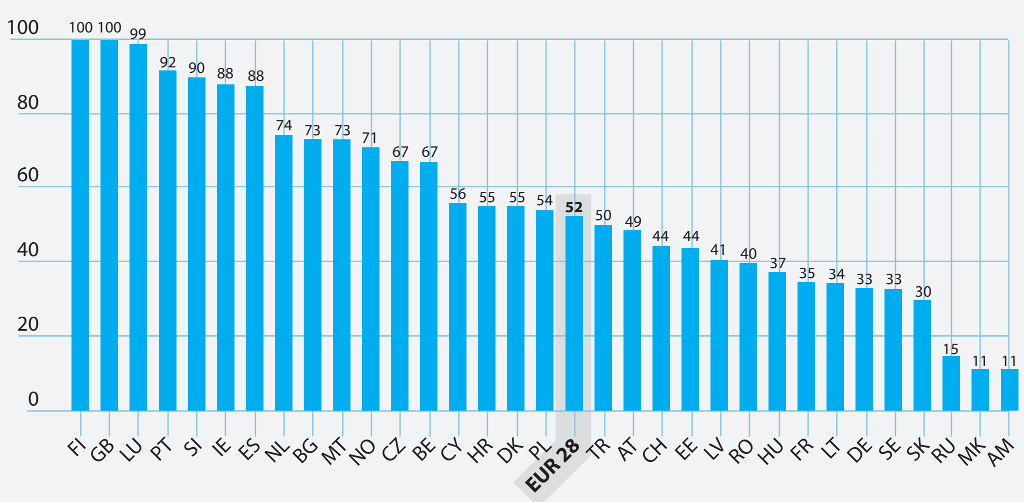
T.2.14
G.2.6

Households subscribing to cable in Europe

2010-2013 In thousand.

	Analogue and digital					Digital				
Country	2010	2011	2012	2013	*2013/12*	2010	2011	2012	2013	*2013/12*
AM	35	37	40	45	*12.5%*	0	0	2	5	*150.0%*
AT	1 332	1 365	1 403	1 360	*-3.1%*	439	521	622	662	*6.4%*
BE	3 451	3 363	3 259	3 207	*-1.6%*	1 564	1 689	2 004	2 154	*7.5%*
BG	1 032	904	827	820	*-0.7%*	450	488	535	601	*12.3%*
CH	2 843	2 809	2 751	2 692	*-2.1%*	706	925	1 134	1 198	*5.6%*
CY	19	27	35	40	*13.8%*	3	6	14	23	*59.3%*
CZ	810	800	770	739	*-4.0%*	470	500	492	498	*1.2%*
DE	19 100	18 700	18 400	18 200	*-1.1%*	3 710	4 526	5 452	6 010	*10.2%*
DK	1 673	1 671	1 712	1 704	*-0.5%*	764	842	886	939	*5.9%*
EE	207	204	195	193	*-1.2%*	29	45	66	85	*27.8%*
ES	1 479	1 448	1 360	1 244	*-8.5%*	1 207	1 220	1 175	1 089	*-7.3%*
FI	1 354	1 377	1 406	1 446	*2.8%*	1 354	1 377	1 406	1 446	*2.8%*
FR	3 491	3 208	3 155	3 120	*-1.1%*	1 242	1 048	1 029	1 082	*5.2%*
GB	3 787	3 772	3 805	3 759	*-1.2%*	3 768	3 772	3 805	3 759	*-1.2%*
HR	151	147	145	150	*3.2%*	47	53	68	83	*21.1%*
HU	2 145	1 991	1 936	1 939	*0.2%*	541	564	645	724	*12.3%*
IE	490	469	446	428	*-4.1%*	381	386	382	377	*-1.4%*
LT	425	437	444	428	*-3.8%*	65	97	120	147	*22.6%*
LU	133	133	119	108	*-9.2%*	126	128	116	107	*-8.0%*
LV	326	315	302	300	*-0.6%*	64	83	101	122	*20.6%*
MK	165	160	173	179	*3.5%*	5	7	12	20	*66.7%*
MT	84	84	82	81	*-1.3%*	61	62	59	59	*-0.1%*
NL	5 334	5 182	4 961	4 740	*-4.5%*	2 837	3 285	3 421	3 524	*3.0%*
NO	945	945	947	933	*-1.4%*	478	530	617	663	*7.5%*
PL	4 489	4 480	4 450	4 400	*-1.1%*	1 088	1 406	1 704	2 376	*39.4%*
PT	1 439	1 434	1 456	1 401	*-3.8%*	1 074	1 193	1 278	1 286	*0.6%*
RO	3 332	3 570	3 800	4 131	*8.7%*	400	910	1 237	1 646	*33.1%*
RU	15 850	16 976	17 990	18 334	*1.9%*	1 095	1 449	1 915	2 676	*39.7%*
SE	2 394	2 368	2 409	2 398	*-0.5%*	814	844	824	785	*-4.7%*
SI	256	260	258	257	*-0.4%*	102	173	217	231	*6.5%*
SK	711	711	728	733	*0.7%*	137	173	197	219	*10.8%*
TR	1 321	1 246	1 251	1 182	*-5.5%*	210	460	521	592	*13.6%*
EUR 28	59 444	58 418	57 864	57 325	*-0.9%*	22 735	25 392	27 856	30 031	*7.8%*
EUR	80 603	80 590	81 015	80 691	*-0.4%*	25 229	28 763	32 057	35 186	*9.8%*

➥ IHS/European Audiovisual Observatory



2013 Level of digitisation. In %.

T.2.15

The 10 main cable operators in Europe 2010-2013

Revenues of cable operators include pay-TV revenues (TV, VoD) as well as revenues from other services (Internet, fixed telephony, mobile telephony).

Multi-utility companies operating cable activities are also excluded.

Operating revenues, EUR million, current rate.

Rank	Company	Country	Platform	Packages	2010	2011	2012	2013	2013/12
1	Liberty Global Europe plc (1)	GB	CATV		6 311.1	7 344.0	7 513.0	10 513.0	39.9%
p.m.	- Virgin Media Finance plc (cons.) (2)	GB	CATV	Virgin Media	4 408.9	4 672.7	4 760.9	4 780.0	0.4%
p.m.	- UPC Holding B.V.	NL	CATV	consolidation	3 787.9	4 013.0	4 459.1	4 350.6	-2.4%
p.m.	- UPC DTH s.à.r.l.	LU	Sat-TV	UPC Direct	3 770.2	4 013.3	~	~	~
p.m.	- UPC Nederland B.V.	NL	CATV	UPC Nederland	869.9	913.8	955.1	~	~
p.m.	- Unitymedia KabelBW GmbH (3)	DE	CATV	Unity Media	86.7	1 630.4	1 801.6	1 927.0	7.0%
p.m.	- Unity Media GmbH	DE	CATV	Unity Media	866.9	–	–	–	–
p.m.	- Kabel BW GmbH (cons.)	DE	CATV	Unity Media	563.0	423.0	682.7	–	–
p.m.	- (Old) Unity Media GmbH	DE	CATV, Sat-TV	Unity Media	–	–	–	–	–
p.m.	- Telenet (turnover) (4)	BE	CATV, ThTV	Telenet	1 299.0	1 376.4	1 488.8	1 641.3	10.2%
p.m.	- Cablecom	CH	CATV	Cablecom	891.2	903.5	913.7	~	~
p.m.	- UPC Communications Ireland Ltd	IE	CATV	UPC	278.1	308.1	330.5	~	~
p.m.	- UPC Polska	PL	CATV	UPC	241.7	238.7	360.5	~	~
p.m.	- UPC Magyar	HU	CATV, Sat-TV	UPC, UPC Direct	228.7	195.6	214.6	213.9	-0.3%
p.m.	- UPC Telekabel Wien	AT	CATV	UPC Austria	219.4	211.9	211.3	212.2	0.4%
p.m.	- UPC Ceska Republika	CZ	CATV, Sat-TV	UPC, UPC Direct	199.5	176.4	177.9	157.8	-11.3%
p.m.	- UPC Romania	RO	CATV, Sat-TV	UPC, UPC Direct	132.9	125.4	126.7	129.1	1.9%
p.m.	-UPC Austria Services	AT	CATV	UPC	92.8	97.6	97.1	103.1	6.2%
p.m.	- UPC Broadband Slovakia	SK	CATV, Sat-TV	UPC, UPC Direct	48.3	46.7	47.0	47.5	1.1%
2	Kabel Deutschland Holding AG (cons)	DE	CATV, Sat-TV	Kabel Digital	1 611.2	1 711.8	1 842.5	1 911.3	3.7%
3	Grupo Corporativo ONO	ES	CATV	TV Esencial, TV Extra, TV Total	1 471.7	1 485.0	1 573.0	1 598.0	1.6%
4	Ziggo N.V. (5)	NL	CATV	Ziggo	1 375.7	1 478.2	1 536.9	1 564.8	1.8%
5	Elisa	FI	CATV	Elisa	1 174.9	1 366.3	1 380.3	1 311.0	-5.0%
6	Numericable Group (6)	FR	CATV	Numericable	1 274.6	1 350.2	1 305.6	1 319.6	1.1%
p.m.	NC Numericable	FR	CATV	Numericable	368.4	366.4	351.5	1 045.7	197.5%
p.m.	Numericable	FR	CATV	Numericable	636.7	690.5	726.5	–	–
p.m.	Cabovisao	PT	CATV	Cabovisao	138.8	126.2	120.7	98.7	-18.2%
p.m.	Est Vidéocommunication	FR	CATV	Numericable	63.2	58.7	~	–	–
p.m.	Coditel Brabant (7)	BE	CATV	Numericable	48.5	21.4	55.7	56.1	0.7%
p.m.	Numericable Belux (7)	BE	CATV	Numericable	–	–	65.5	–	–
p.m.	Coditel s.à.r.l.	LU	CATV	Numericable	16.1	~	~	~	~
7	Tecteo Group (cons.)	BE	CATV	Voo	554.9	653.1	743.9	808.6	8.7%
8	Zon Multimedia S.A. NOS SGPS (8)	PT	CATV, Sat-TV	ZON TV Cabo	859.7	854.8	858.6	787.1	-8.3%
p.m.	Zon TV Cabo Portugal	PT	CATV	ZON TV Cabo	709.8	693.7	666.7	–	–
9	DNA Oy (cons.)	FI	CATV	DNA	694.2	731.4	771.6	768.8	-0.4%
10	RCS & RDS SA	RO	CATV, Sat-TV	Digi TV	456.6	518.6	520.0	509.7	-2.0%
p.m.	Digi Tavkozlesi Kft	HU	CATV	Digikabel	106.2	117.3	135.7	134.8	-0.7%

(1) The accounts of Liberty Global Europle plc are published in USD. The total revenues include operations in Chile.

(2) On 03/03/2006 ntl Incorporated completed a merger with Telewest Global, Inc. On 04/07/2006 ntl Incorporated completed its acquisition of Virgin Mobile, creating the first opportunity for customers in the UK to buy a 'quadruple-play'. The group was rebranded as Virgin Media. In June 2010 Virgin Media Inc sold the Virgin Media TV channels (Living, Livingit, Challenge, Challenge Jackpot, Bravo, Bravo 2 and Virgin1) to BSkyB. In February 2013 Liberty Global has confirmed an agreed USD 23.3 billion cash and stock bid for Virgin Media. Virgin Media is consolidated in Liberty Global Europe since 08/06/2013. Turnover for the period 08/06/2013-31/12/2013 was USD 3 653.7 millions (EUR 2 656.4 millions).

(3) 2011 data pro forma. Unity Media GmbH was born in 2005 from the merger of the two cable operators IESY GmbH and ish. The group was fully acquired by Liberty Global in January 2010. The subsidiary Arenasat ceased operation of its satellite package in September 2010. In 2012 Kabel BW was folded into the Unitymedia credit pool and became Unitymedia KabelBW.

(4) In December 2006, Liberty Global sold its interest in UPC Belgium to Telenet Group Holding N.V., the largest cable operator in Belgium. In a separate transaction, Liberty Global increased its ownership in Telenet to a controlling stake and on 31/03/2007 it owned 31.3%. Since March 2007, Liberty Global has progressively increased its ownership in Telenet to 51.1% as of 31/12/2007. In September 2012, Liberty Global Inc. launched a tender offer for the nearly 50% of Telenet Group Holding NV that it doesn't already own. In January 2013, Liberty Global announced that it has a stake of 58% in Telenet.

(5) In January 2014 Liberty Global has announced the takeover of Ziggo N.V. for approximately EUR 10 billions.

(6) In March 2005, the company Ypso acquired France Télécom Câble, TDF Câble and NC Numericable. In November 2005 Cinven acquired Altice One, owner of Coditel in Belgium and Luxembourg and of Videocom in France. In July 2006, Ypso acquired Noos/UPC France. Since August 2007, Numericable has been the common brand. In March 2008, the US equity company, The Carlyle Group, acquired 37.85% of the group Numericable-Completel. In 2013 Numericable was introduced in the stock exchange, and share of Altice reached 40%. This takeover (aiming at full control) was green lighted by the French Competition Authority in January 2014. In November 2014 the sale by Vivendi of the SFR telecommunication company to Altice S.A. was completed.

(7) Coditel Belgique 2011 on 5 months. In July 2011 the French group Ypsos sold the companies Coditel in Belgium and Luxembourg to a consortium between the Luxembourg group Deficom Telecom (Deficom and Altice) and the private equity group Apax Partners. A new company Numericable Belux was created. In March 2013, Altice VII (controlled by Altice S.A.) has taken control of Coditel, with 40% of the shares.

(8) After the merger with Optimus in 2013, Zon Multimedia was rebranded NOS SGPS in 2014.

➡ European Audiovisual Observatory

T.2.16 Main cable operators in Europe by country
December 2014

Country of establishment	Total number of cable operators in the country	Main cable operators	Group	Name of the service	Number of TV channels	Number of HD channels	Number of subscribers (thousand)	Of which digital subscribers (thousand)
AL	50	Alfa Cable		DigiCable	130	~	~	~
AT	>250	kabelplus GmbH	EVN AG	kabelplus	160	21	~	~
		Liwest Kabelmedien GmbH	Liwest Kabelmedien GmbH	Liwest Kabel-TV	160	17	125 (12.2013)	60
		UPC	Liberty Global	UPC TV	160	30	523 (06.2014)	355
BA	45	Telemach d.o.o.	The United Group (KKR) [1]	Telemach Digital TV	168	27	~	~
BE	6	Brutélé SC / Tecteo		Voo	165	14	1 500 (12.2013) [2]	~
		Sprl Coditel	Deficom/Altice [3]	Numericable	255	25	110 (*est.* 12.2012)	~
		Telenet N.V.	Liberty Global	Telenet	257	32	2 077 (06.2014)	1 539
BG	>650	Cabletel/Eurocom	EQT V	Blizoo	173	25	440 (*est.* 12.2013)	~
		Skat OOD		Skat	157	12	~	~
CH	>240	Cablecom GmbH	Liberty Global	UPC Cablecom	205	64	1 415 (06.2014)	683
		022 Télégenève SA	Cablecom (49%)	Naxoo	294	35	85 (11.2011)	40
CY	2	Cablenet Communications Systems Ltd.	GO plc [4]	Cablenet	88	15	45 (12.2013)	14
		Lumiere TV Ltd.		LTV Cable & LTV 3Play	96	11	~	~
CZ	28	Rio Media Group	Argus Capital Partners	Rio Media	107	9	115 (05.2011)	~
		UPC Ceska Republika a.s.	Liberty Global	UPC	151	22	458 (06.2014)	372
DE	>100	Tele Columbus AG [5]	Tele Columbus Group	Telecolumbus	98	34	1 700 (12.2013)	~
		Kabel Deutschland	Vodafone	Kabel Deutschland	209	29	8 403 (12.2013)	~
		UnityMedia Kabel BW GmbH	Liberty Global [6]	Kabel BW	145	20	6 585 (06.2014)	2 258
		UnityMedia Kabel BW GmbH	Liberty Global	Unitymedia	219	45		
DK	>1 500	Canal Digital Kabel TV A/S	SE [7]	Canal Digital Kabel TV	123	25	56 (12.2011)	~
		Stofa A/S	SE [8]	Stofa	151	36	400 (12.2012)	~
		YouSee A/S	TDC	YouSee	144	47	1 166 (12.2013)	~
EE	12	AS Starman	East Capital Explorer [9]	Starman DigiTV	215	20	130 (05.2013)	~
		STV AS		STV DigiTV	261	23	65 (12.2008)	~
ES	>500	Cableuropa SAU	Vodafone [10]	Ono	123	36	790 (12.2013)	~
		Euskaltel		Euskaltel	126	26	155 (12.2012)	~
FI	25	DNA Finland Oy	DNA	Welho	167	29	591 (12.2013)	591
		Elisa Oyj		Elisa	170	40	265 (04.2013)	265
		TeliaSonera Finland Oyj	TeliaSonera	Sonera	197	20	410 (04.2013)	410
FR	30	NC Numericable	Cinven / Altice [11]	Numéricable	315	53	1 600 (*est.* 12.2013)	~
GB	3	Virgin Media	Liberty Global [12]	Virgin TV	279	26	3 734 (06.2014)	3 734
HR	20	Vipnet	Telekom Austria	B.NET	207	24	157 (12.2013)	~
HU	>400	T-Kábel Magyarország	Deutsche Telekom	T-Kabel	127	16	180 (06.2014)	~
		UPC Magyarország	Liberty Global	UPC	150	21	636 (06.2014)	396
IE	2	UPC Broadband Ireland Limited	Liberty Global	UPC	171	32	381 (06.2014)	337
IS	3	Siminn	Exista	Siminn	100	1	~	~
LI	1	Telecom Liechtenstein		TVISION	137	15	~	~
LT	50	UAB Balticum TV	Balticum Grupe	Balticum TV	189	18	85 (11.2013)	19
		UAB Cgates	Advanced Broadband Ltd/ UAB SEB Venture Capital	Cgates	54	0	113 (01.2013)	18
		UAB Vinita	Init	Vinita	229	21	103 (01.2013)	5

T.2.16

Main cable operators in Europe by country
December 2014

continued

Country of establishment	Total number of cable operators in the country	Main cable operators	Group	Name of the service	Number of TV channels	Number of HD channels	Number of subscribers (thousand)	Of which digital subscribers (thousand)
LU	55	Eltrona	Entreprise des P&T	Imagin	210	29	100 (12.2013)	~
		Coditel SARL	Deficom/ Apax	Numericable	251	21	30 (*est.* 12.2012)	~
LV	57	Baltcom TV SIA		Baltcom	176	18	140 (12.2012)	~
		SIA IZZI	Baltcom TV SIA	Izzi	188	34	120 (12.2012)	~
MK	53	Blizoo Macedonia	Telekom Austria [13]	Blizoo	135	8	63 (12.2013)	*est.* 47
MT	1	Melita plc	GMT Communications Partners	Melita	163	17	81 (12.2013)	~
NL	21	CAIW Diensten B.V.	CAIW Holding	Caiway	198	26	143 (03.2011)	143
		UPC Nederland B.V.	Liberty Global [14]	UPC	206	40	1 604 (06.2014)	1 120
		Ziggo N.V.	Zesko Holding B.V. [15]	Ziggo	186	28	2 300 (12.2013)	2 300
NO	>950	Canal Digital Norge AS	Telenor	Canal Digital Kabel TV	139	48	527 (12.2013)	~
		Get AS [16]		Get	132	25	410 (06.2012)	~
PL	>400	Multimedia Polska S.A.		Multimedia Telewizji Cyfrowej DTV	175	49	825 (12.2013)	183
		UPC Polska Sp. z o.o.	Liberty Global	UPC	225	50	1 213 (06.2014)	887
		Vectra S.A.		Vectra	199	43	871 (12.2013)	360
PT	6	Cabovisão [17]	Altice		115	15	237 (12.2013)	~
		Zon Optimus/ NOS [18]	Zon Optimus/NOS	NOS	173	41	1 210 (12.2012)	~
RO	>400	Romtelecom (Telekom Romania Communications) [19]	OTE (Deutsche Telekom)	Telekom TV	92	6	180 (12.2010)	~
		RCS/RDS	RCS/RDS	Digi TV Cablu	96	12	1 600 (12.2011)	~
		UPC Romania SA	Liberty Global	UPC Digital	163	17	844 (06.2014)	515
RU	600	MTS (incl. Comstar)	Sistema	MTS	200	~	2 980 (12.2013)	~
		ER-Telecom		Divan-TV	130	~	1 500 (09.2011)	~
		Rostelecom (incl. NT)		Rostelecom	~	~	510 (12.2010)	~
SE	91	Canal Digital Sverige AB	Telenor	Canal Digital Kabel TV	129	26	284 (12.2013)	~
		Com Hem AB	BC Partners Ltd	Com Hem	145	21	606 (06.2013) [20]	606
		Tele2 Syd AB	Tele2/ Telenor [21]	Tele2	117	4	295 (12.2013)	75
SI	73	Telemach	The United Group (KKR) [1]	Telemach Digital TV	190	29	200 (12.2013)	~
SK	22	UPC Broadband Slovakia	Liberty Global	UPC Digital	136	19	186 (06.2014)	137
TR	12	Türksat A.S.		Türksat	154	14	1 192 (09.2013)	~

1. Mid Europa Partners divested their cable interests in South East Europe in 2014 to KKR.
2. There is no breakdown of the number of subscribers to the Voo package between the two companies which distribute the platform (Brutélé and Tecteo).
3. Apax France sold all its shares (40%) in cable operator Numericable Belgium/Luxembourg to co-owner Altice in 2013.
4. The Maltese pay DTT and IPTV operator GO plc acquired 25% of Cablenet in September 2014. This was in exchange for a loan which will be converted to equity, leading to a 45% share in the future.
5. On 12/09/2014, Tele Columbus Holding GmbH changed its name and legal form to Tele Columbus AG.
6. Liberty Global was given clearance from the German competition authorities in December 2011 to take over Kabel BW. Subscriber data for Kabel BW and Unitymedia combined.
7. Ratos-owned Stofa acquired parts of the Danish cable TV operations in Canal Digital in 2011. In October 2012, Ratos signed an agreement to sell Stofa to SE, formerly known as Syd Energi.
8. Data includes IPTV subscribers.
9. In May 2013, Swedish investment company East Capital Explorer AB has agreed to acquire a majority stake in Starman.
10. Vodafone completed its takeover of Spanish cable operator ONO in July 2014.
11. Altice-Numericable took over the major telecoms operator SFR, following approval of the French competition authority in November 2014.
12. Liberty Global took over Virgin TV cable services in 2013.
13. Telekom Austria took over Blizoo from EQT V in Macedonia in July 2014. The Blizoo in Bulgaria was not sold.
14. Liberty Global was in the process of merging with Zesko, and the merger was cleared by the Competition DG of the European Commission in October 2014.
15. In April 2013, Warburg Pincus LLC and Cinven Ltd. sold their holdings in Ziggo NV. Liberty Global was the largest shareholder, after acquiring a 12.65% stake in Ziggo from Cinven and Warburg Pincus in March 2013.
16. In September 2014, TDC A/S agreed to acquire Get AS.
17. Cabovisão was sold in March 2012 by the Canadian company Cogeco Cable to the European group Altice.
18. Zon Multimedia merged with Optimus in 2013 and became Zon Optimus. In May 2014, the company was rebranded as NOS.
19. Deutsche Telekom has a 40% share in OTE. Via these shares a new branding took place of Romtelecom in September 2014, now following the Deutsche Telekom brand. Romtelecom becomes Telekom Romania Communications.
20. In addition, Com Hem has almost 1.2 million subscribers through "landlord contracts".
21. On 02/01/2014, Telenor acquired 100% of the voting rights in Tele2's Swedish residential fibre and cable TV business for NOK 749 million.

There are no cable networks in Greece and Italy.

➥ European Audiovisual Observatory / MAVISE database / company websites and reports

T.2.17
G.2.7

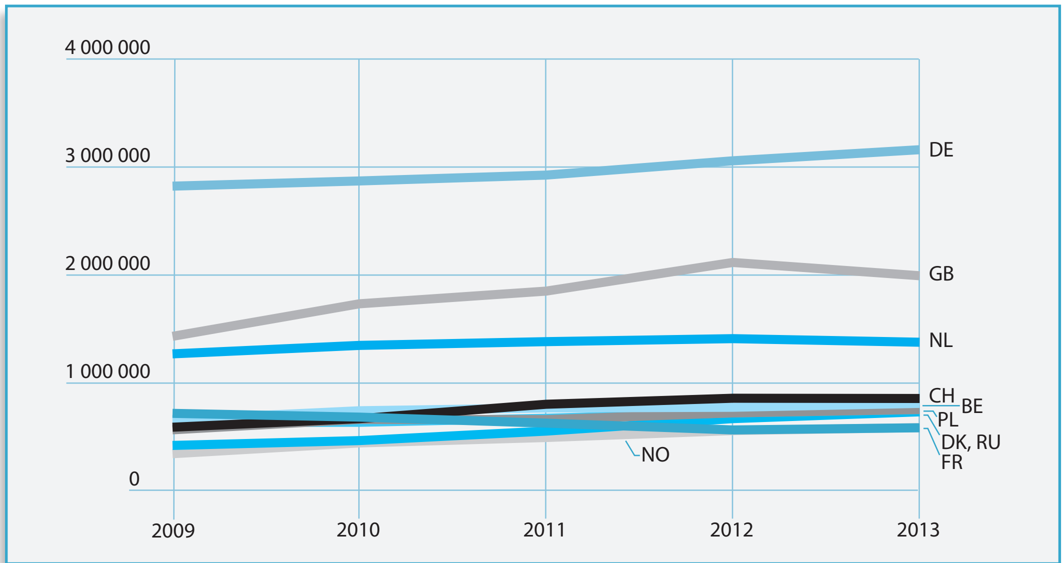
Consumer expenditures for cable audiovisual services

2009-2013 EUR thousand. Including transactional services, NVoD or VoD.

Country	2009	2010	2011	2012	2013	2013/12
AT	291 524	304 704	318 177	346 845	362 062	***4.4%***
BE	648 963	731 265	756 874	763 400	799 698	***4.8%***
BG	144 689	122 611	110 953	101 440	94 796	***-6.6%***
CH	577 942	657 338	791 709	847 811	845 523	***-0.3%***
CY	1 420	2 873	4 642	6 416	7 747	***20.7%***
CZ	142 293	154 259	164 075	164 846	157 914	***-4.2%***
DE	2 823 448	2 871 660	2 926 315	3 059 444	3 162 850	***3.4%***
DK	620 650	623 724	661 457	710 656	741 885	***4.4%***
EE	25 396	24 289	24 939	25 467	25 869	***1.6%***
ES	469 311	437 194	455 173	471 697	442 411	***-6.2%***
FI	263 349	265 599	310 794	328 384	351 522	***7.0%***
FR	706 903	671 916	615 855	552 386	572 474	***3.6%***
GB	1 424 516	1 727 443	1 845 612	2 112 633	1 988 874	***-5.9%***
HR	20 956	23 389	25 118	25 614	28 458	***11.1%***
HU	340 224	348 908	334 926	304 286	295 100	***-3.0%***
IE	227 468	228 835	221 754	221 569	219 995	***-0.7%***
LT	27 849	28 757	28 585	33 641	36 745	***9.2%***
LU	28 405	29 899	30 816	29 930	28 422	***-5.0%***
LV	35 039	36 137	37 709	38 273	40 040	***4.6%***
MK	9 970	10 278	10 491	11 056	12 427	***12.4%***
MT	19 352	20 661	20 922	21 285	21 285	***0.0%***
NL	1 261 162	1 339 857	1 374 906	1 402 857	1 369 514	***-2.4%***
NO	331 135	431 421	481 909	546 040	574 369	***5.2%***
PL	553 747	650 403	648 759	711 082	742 390	***4.4%***
PT	386 207	406 079	410 362	421 138	421 471	***0.1%***
RO	225 576	225 933	244 338	268 705	308 236	***14.7%***
RU	408 128	453 241	541 484	657 809	721 133	***9.6%***
SE	363 820	404 033	457 129	489 846	463 408	***-5.4%***
SI	49 277	49 085	52 927	56 430	57 847	***2.5%***
SK	109 968	114 372	117 601	122 026	128 396	***5.2%***
TR	59 752	64 523	72 979	79 061	82 849	***4.8%***
EUR 28	**11 211 511**	**11 843 886**	**12 200 718**	**12 790 298**	**12 869 406**	***0.6%***
EUR	**12 598 437**	**13 460 686**	**14 099 291**	**14 932 075**	**15 105 707**	***1.2%***

No cable services in Greece and Italy. No data for Albania, Bosnia and Herzegovina, Iceland, Liechtenstein and Montenegro.

IHS



2009-2013 EUR thousand.

Alongside the provision of broadband, IPTV, TV channels and on-demand services, and the purchase of sports rights (for example BT in the UK), telecommunications operators continue to enter cable and satellite markets. Examples in the cable market include Vodafone (Germany and Spain), Telekom Austria (Croatia and Macedonia), and Deutsche Telekom (Hungary and Romania). Many telecommunications operators offer their IPTV packages over satellite. These include Deutsche Telekom (Czech Republic, Germany, Greece, Croatia, Hungary, Romania and the Slovak Republic), France Telecom (France, Poland and Romania), and Telekom Austria (Bulgaria and Croatia). On the other hand, the market is also witnessing the take-over of some telecommunications firms by cable operators. The most significant to date is the takeover by the Numéricable Group of SFR (approved with certain conditions by the French competition authority in November 2014).

It should of course be noted that in the market for the provision of IPTV services, there are several players operating on a pan-European basis: Deutsche Telekom is providing these services in 10 European countries; TeliaSonera in six countries; and France Telecom in five (see table T.2.1.8).

The French IPTV market contained 48% of subscribers in the EU at the end of 2013 (and 38% in Europe). IPTV also has a strong presence (with more than 20% of IPTV households) in Belgium, Cyprus, Switzerland, Estonia, Croatia, Iceland, Montenegro, the Netherlands, Portugal and Slovenia. On the other hand, IPTV is still marginal in many countries: it serves around 5% (or less) of homes in Bulgaria, the Czech Republic, Germany, Greece, Ireland, Italy, Malta, Poland, Romania, the Russian Federation, Spain, the United Kingdom and Turkey. It is, however, likely that Turkey and Russia are potential growth markets in the area of IPTV dependent on the roll-out of broadband services.

The overall number of IPTV platforms continued to increase in 2013/2014. In October 2014 estimates from the MAVISE database show that there were 188 services (bearing in mind that in some countries it is quite difficult to get an accurate figure as there are many small services, for example in Denmark, Sweden, Bulgaria and Russia). The market has witnessed some significant closures, specifically in Italy where IPTV provider Fastweb closed its service in November 2012 and Wind's Infostrada TV closed in June the same year. This left Telecom Italia as the only remaining provider in Italy. A variety of new services have also been launched. A second IPTV service emerged

Parallèlement à la fourniture du haut débit, de l'IPTV, de chaînes de télévision et de services à la demande, et à l'achat de droits sportifs (par exemple, BT au Royaume-Uni), les opérateurs de télécommunications poursuivent leur implantation sur les marchés du câble et du satellite. Citons pour le marché du câble, Vodafone (Allemagne et Espagne), Telekom Austria (Croatie et Macédoine), et Deutsche Telekom (Hongrie et Roumanie). De nombreux opérateurs de télécommunications proposent leurs bouquets IPTV par satellite. Il s'agit notamment de Deutsche Telekom (République tchèque, Allemagne, Grèce, Croatie, Hongrie, Roumanie et République slovaque), France Télécom (France, Pologne et Roumanie) et Telekom Austria (Bulgarie et Croatie). D'autre part, le marché observe également la prise de contrôle de certaines sociétés de télécommunications par des câblo-opérateurs. La plus importante à ce jour est celle de SFR par le groupe Numéricable (autorisée, sous conditions, par l'Autorité française de la concurrence fin octobre 2014).

Il convient bien entendu de noter que, sur le marché de la fourniture de services IPTV, plusieurs acteurs opèrent sur une base paneuropéenne : Deutsche Telekom fournit ces services dans 10 pays européens, TeliaSonera dans six pays et France Télécom dans cinq pays (voir tableau T.2.1.8).

Le marché français de l'IPTV comptait 48 % des abonnés de l'UE fin 2013 (et 38 % des abonnés en Europe). L'IPTV est également fortement présente (plus de 20 % des ménages) en Belgique, Chypre, Suisse, Estonie, Croatie, Islande, Monténégro, Pays-Bas, Portugal et Slovénie. Mais, l'IPTV reste marginale dans de nombreux pays : elle est adoptée par moins de 5 % des foyers en Bulgarie, République tchèque, Allemagne, Grèce, Irlande, Italie, Malte, Pologne, Roumanie, Fédération de Russie, Espagne, Royaume-Uni et Turquie. Toutefois, la Turquie et la Russie sont de potentiels marchés de croissance pour l'IPTV, en fonction du déploiement des services haut débit.

Le nombre total de plates-formes IPTV a continué d'augmenter en 2013-2014. En octobre 2014, la base de données MAVISE estime à 188 le nombre de ces services (en gardant à l'esprit que dans certains pays, il est assez difficile d'obtenir un chiffre précis car il existe beaucoup de petits services, par exemple au Danemark, en Suède, en Bulgarie et en Russie). Le marché a connu des fermetures importantes, en particulier en Italie où le fournisseur IPTV Fastweb a fermé son service en novembre 2012 et Infostrada TV de Wind a fermé en juin de la même année. Telecom Italia reste ainsi le seul fournisseur en Italie. Plusieurs nouveaux services ont également été lancés. Un

Telekommunikationsunternehmen bieten inzwischen nicht nur Breitband, IPTV, Fernsehkanäle und On-Demand-Dienste an. Sie sind auch zunehmend auf dem Markt für Sportrechte aktiv (z.B. BT im Vereinigten Königreich) und dringen auf den Kabelfernseh- und Satellitenmarkt vor. Auf dem Kabelmarkt engagieren sich z.B. Vodafone (Deutschland und Spanien), die Telekom Austria (Kroatien und Mazedonien) und die Deutsche Telekom (Ungarn und Rumänien). Viele Telekom-Unternehmen bieten ihre IPTV-Pakete über Satellit an. So etwa die Deutsche Telekom (Tschechische Republik, Deutschland, Griechenland, Kroatien, Ungarn, Rumänien und die Slowakische Republik), France Télécom (Frankreich, Polen und Rumänien) und die Telekom Austria (Bulgarien und Kroatien). Umgekehrt kommt es jedoch auch zur Übernahme von Telekom-Unternehmen durch Kabelbetreiber. Der bisher spektakulärste Fall ist die Übernahme des französischen Mobilfunkanbieters SFR durch die Numéricable-Gruppe (die Übernahme ist von der französischen Wettbewerbsbehörde unter Auflagen im November 2014 genehmigt).

Einige der Unternehmen auf dem Markt für IPTV-Dienste operieren auf einer gesamteuropäischen Basis: Die Deutsche Telekom ist mit ihren Diensten in zehn europäischen Ländern präsent; die finnisch-schwedische TeliaSonera in sechs Ländern und France Telecom in fünf (siehe Tabelle T.2.1.8).

Ende 2013 zählte der französische IPTV-Markt 48 % der Abonnenten in der EU (und 38 % der Abonnenten in Europa). Länder, in denen IPTV ebenfalls sehr stark verbreitet ist (mit über 20 % an IPTV-Haushalten), sind Belgien, Zypern, die Schweiz, Estland, Kroatien, Island, Montenegro, die Niederlande, Portugal und Slowenien. Relativ unbedeutend ist IPTV dagegen noch in Ländern wie Bulgarien, der Tschechischen Republik, Deutschland, Griechenland, Irland, Italien, Malta, Polen, Rumänien, der Russischen Föderation, Spanien, dem Vereinigten Königreich und der Türkei. Dort liegt die Zahl der Haushalte, die Fernsehen über das Internet empfangen, bei 5 % oder weniger. Die Türkei und Russland gelten jedoch als potenzielle Wachstumsmärkte für IPTV, sofern die Breitbandverbindungen in entsprechendem Umfang ausgebaut werden.

Die Zahl der IPTV-Plattformen ist 2013/2014 weiter gestiegen. Aus Schätzungen auf der Grundlage von Daten der MAVISE-Datenbank geht hervor, dass es im Oktober 2014 insgesamt 188 solcher Dienste gab (in einigen Ländern ist es jedoch sehr schwierig, genaue Zahlen zu erhalten, da es dort sehr viele kleine Anbieter gibt, zum Beispiel in Dänemark, in Turkey with Turkcell TV+ (from Turkcell) in 2014. Everything Everywhere (the France Telecom/ Deutsche Telekom joint venture in the UK) launched EE TV Now in October 2014. The Irish telecoms operator Eircom launched eVision at the end of 2013. Also in 2014, Eutelsat Visavision GmbH ("Kabelkiosk", recently taken over by the M7 Group) launched the service meinFernsehen.

The number of IPTV subscribers grew 12.2% in the EU between 2012 and 2013, according to IHS data, and 14% across Europe. Consumer expenditure on IPTV services has a similar growth. It should be noted that it is not possible to get a breakdown between revenues for IPTV and those for on-demand services provided over IPTV. Consumer expenditure is highest in France, where it was more than 1.8 billion in 2013. The Italian consumer expenditure has practically been decimated (83 million in 2011 and just 9 million in 2013) since the closure of major services: Wind closed Infostrada TV in June 2012, and Fastweb TV closed down in November 2012.

European IPTV platforms offer access to a large number of HD channels and on-demand services. According to the MAVISE database, at the end of 2013, 125 European IPTV operators were offering their own on-demand services. While many packages mainly offer access to their own catalogue of films or videos on demand, some operators provide an extensive range of VoD services (including third party) with more than 40 on demand services available from Deutsche Telekom Entertain (Germany); Free and SFR (France); Altibox (Norway); and TeliaSonera in Sweden (T.2.18).

second service IPTV a émergé en Turquie avec Turkcell TV+ (Turkcell) en 2014. Everything Everywhere (coentreprise de France Télécom et Deutsche Telekom au Royaume-Uni) a lancé EE TV Now en octobre 2014. L'opérateur de télécommunications irlandais Eircom a présenté eVision fin 2013. Aussi en 2014, Eutelsat VisAvision GmbH (« Kabelkiosk », récemment repris par le groupe M7) a lancé le service meinFernsehen.

Le nombre d'abonnés IPTV a augmenté de 12,2 % dans l'UE entre 2012 et 2013, selon les données de IHS, et de 14 % à travers l'Europe. Les dépenses de consommation pour les services IPTV ont connu une croissance similaire. Il est à noter qu'il est impossible d'obtenir une répartition entre les revenus de l'IPTV et ceux des services à la demande fournis sur IPTV. Les dépenses de consommation sont les plus élevées en France : 1,8 milliard en 2013. En Italie, elles ont été pratiquement décimées (83 millions en 2011 et à peine 9 millions en 2013) depuis la fermeture des principaux services : Wind a fermé Infostrada TV en juin 2012, et Fastweb TV a fermé en novembre 2012.

Les plates-formes IPTV européennes donnent accès à un grand nombre de chaînes HD et services à la demande. Selon la base de données MAVISE, fin 2013, 125 opérateurs IPTV proposent leur propre service à la demande. Alors que la plupart des bouquets IPTV offrent principalement un accès à leur propre catalogue de films ou de vidéos à la demande, certains opérateurs proposent une vaste gamme de services de VoD (y compris de tiers), plus de 40 services à la demande étant proposés par Deutsche Telekom Entertain (Allemagne) ; Free et SFR (France) ; Altibox (Norvège) ; et TeliaSonera (Suède) (T.2.18).

Schweden, Bulgarien und Russland). Auf der anderen Seite mussten jedoch einige Anbieter ihren Betrieb einstellen, vor allem in Italien. Im November 2012 schloss der IPTV-Anbieter Fastweb, Infostrada TV von Wind ging bereits im Juni 2012 vom Netz. Damit ist die Telecom Italia der einzige Anbieter von IPTV in Italien. In anderen Ländern wurde eine Reihe neuer Dienste gestartet. In der Türkei kam 2014 mit Turkcell TV+ (vom Mobilfunkanbieter Turkcell) ein zweiter IPTV-Anbieter auf den Markt. Everything Everywhere (das Joint Venture von France Telecom/Deutsche Telekom im Vereinigten Königreich) startete im Oktober 2014 EE TV Now. Der irische Telekomanbieter Eircom brachte Ende 2013 eVision auf den Markt. Ebenfalls 2014 hat Eutelsat Visavision GmbH (die Plattform „Kabelkiosk", vor kurzem von der M7-Gruppe übernommen) den Dienst meinFernsehen gestartet.

Die Zahl der IPTV-Abonnenten wuchs IHS Daten zufolge in der EU zwischen 2012 und 2013 um 12,2 % und um 14 % in ganz Europa. Bei den Verbraucherausgaben für IPTV-Dienste war das Wachstum ähnlich stark. Allerdings ist es nicht möglich, eine Aufschlüsselung der Einnahmen getrennt nach IPTV und On-Demand-Diensten zu erhalten, die über IPTV angeboten werden. Am höchsten sind die Verbraucherausgaben in diesem Bereich in Frankreich: mehr als 1,8 Mrd. 2013. In Italien gingen die Verbraucherausgaben zwischen 2011 und 2013 um fast 90 % zurück (83 Mio. 2011 – 2013 waren es noch 9 Mio.), nachdem die bedeutendsten Anbieter schließen mussten (Wind stellte im Juni 2012 Infostrada TV ein, und Fastweb TV ging im November 2012 vom Netz).

Über europäische IPTV-Plattformen haben die Kunden Zugang zu einer großen Zahl von HD-Sendern und On-Demand-Diensten. Den Angaben der MAVISE-Datenbank zufolge boten Ende 2013 insgesamt 125 europäische IPTV-Betreiber ihre eigenen On-Demand-Dienste an. Die meisten IPTV-Pakete beschränken sich auf die eigenen Film- oder VoD-Kataloge der Anbieter, einige bieten allerdings auch eine breite Palette von VoD-Diensten (auch von Dritten) an. So haben die Deutsche Telekom Entertain (Deutschland), Free und SFR (Frankreich), Altibox (Norwegen) und TeliaSonera in Schweden mehr als 40 On-Demand-Dienste in ihrem Angebot (T.2.18).

➥ European Audiovisual Observatory

T.2.18 Main IPTV operators in Europe
December 2014

Country	Total IPTV operators in the country	Company	Group	Name of the service	Date of launch	Number of TV channels	Number of HD channels	Number of on-demand services	Number of IPTV subscribers (thousand)
AT	3	Infotech Edv-Systeme GmbH		Inext.TV	2007	50	0	1	~
		Telekom Austria Aktiengesellschaft	Telekom Austria Group	A1 TV	2006	191	41	2	235 (12.2013)
BA	4	BH Telecom		Moya TV	2010	123		1	60 (*est.* 12.2013)
BE	4	Belgacom Skynet	Belgacom	Proximus TV	2005	200	28	3	1 479 (12.2013)
		Favco SPRL	Alpha Networks	Billi	2010	70	0	0	~
		Scarlet Belgium S.A.	Belgacom	Proximus TV	2010	200	28	8	~
BG	12	Mobiltel Ead	Telekom Austria Group	Quarto	2009	183	19	1	78 (12.2013)
		Networx Bulgaria Ood		Networx TV	2007	125	2	0	~
		Vestitel Bg Ad	Overgaz/ Gazprom	Tivia	2009	113	8	1	2 (12.2009)
CH	8	Swisscom	Swisscom	Swisscom TV	2006	250	70	1	1 100 (06.2014)
CY	2	Cyta (Cyprus Telecommunications Authority)		Cytavision	2004	90	9	1	30 (*est.* 12.2012)
		Primetel plc		PrimeTV	2006	58	6	6	30 (*est.* 12.2012)
CZ	5	Rio Media Group	Rio Media Group	Rio Media	2009	115	9	1	~
		Telefónica O2 Czech Republic, A.S.	PPF/ Telefónica S.A. [1]	O2 TV	2006	114	11	2	136 (12.2012)
		T-Systems Czech Republic, A.S.	Deutsche Telekom AG	Via TV	2009	105	19	0	~
DE	6	Deutsche Telekom AG	Deutsche Telekom AG	Entertain	2006	266	84	47	2 200 (12.2013)
		Vodafone GmbH	Vodafone Group plc	Vodafone TV	2011	139	29	2	150 (12.2013)
DK	23	Dansk Bredbaand A/S	Waoo! A/S	Dansk Bredbånds TV	2005	95	19	1	26 (12.2013)
		Altibox Danmark A/S	Lyse Energi	Altibox	2009	68	31	1	17 (12.2013)
		TDC A/S [2]	TDC	TDC TV	2007	95	15	4	218 (12.2013) [3]
		Telia Telecom A/S	TeliaSonera	Telia TV	2007	70	1	3	17 (12.2013)
		Waoo! A/S		Waoo!	2010	115	32	9	10 (12.2010)
EE	1	Elion Ettevõtted As	TeliaSonera	Nuti TV	2006	206	7	3	163 (12.2013) [4]
ES	3	France Telecom España S.A.	France Télécom	Orange TV	2006	61	0	1	65 (12.2013)
		Jazz Telecom S.A. [5]		Seleccion y Canal+ Liga	2006	54	0	2	9 (06.2010)
		Telefónica de España S.A.	Telefónica S.A.	Movistar Imagenio	2005	142	11	1	792 (08.2013)
FI	7	Elisa Oyj		Elisa Viihde	2009	176	50	7	~
		Teliasonera Finland Oyj	TeliaSonera	Koti TV	~	179	42	2	436 (12.2013) [4]
FR	12 [6]	Bouygues Telecom	Bouygues	Bbox	2008	346	22	26	2 200 (12.2013)
		Darty [7]		Dartybox	2006	298	24	29	
		France Télécom	France Télécom	La TV d'Orange	2004	246	30	13	5 600 (12.2013) [8]
		Free	Iliad	Freebox	2004	510	48	48	5 700 (12.2013) for Free and Alice
		Free	Iliad	Alice Box	2005	334	22	0	
		SFR	Altice/ Numéricable [9]	Neufbox de SFR	2004	416	11	40	3 300 (12.2013)
GB	3	British Telecommunications plc	BT Group plc	BT Vision	2006	18	4	10	1 000 (04.2014)
		TalkTalk	TalkTalk Telecom Group plc	TalkTalk TV Plus [10]	2007	108	6	6	1 100 (07.2014)
		Everything Everywhere	Deutsche Telekom/ France Télécom	EE TV Now [11]	2014	70	13		~

T.2.18

Main IPTV operators in Europe
December 2014

continued

Country	Total IPTV operators in the country	Company	Group	Name of the service	Date of launch	Number of TV channels	Number of HD channels	Number of on-demand services	Number of IPTV subscribers (thousand)
GR	3	Hellas Online S.A.	Vodafone [12]	Hol TV	2009	28	1	1	~
		Hellenic Telecommunications Organization S.A.	Deutsche Telekom	OTE TV via Conn-X	2008	65	13	2	250 (12.2013)
		On Telecoms		ON-TV	2007	47	0	1	130 (12.2012)
HR	5	AMIS Telekom		Amis TV	2009	116	6	0	~
		T-HT D.D.	Deutsche Telekom AG	MaxTV	2007	182	14	3	391 (12.2013) [8] for Max and Ikson
		Iskon Internet D.D.		Iskon TV	2009	109	0	2	
HU	4	Invitel Távközlési Zrt. ("Invitv")	Mid Europa Partners LLP	Invitv	2007	114		1	~
		Magyar Telekom	Deutsche Telekom AG	T-Home TV	2006	127	16	2	313 (12.2012)
IE	2	Magnet Networks Limited	Columbia Ventures Corporation	Magnet Entertainment	2005	82	2		30 (09.2013)
		Eircom	Eircom	eVision [13]	2013	59	7		~
IS	2	Siminn		Siminn TV	2004	>100	4	2	~
		Vodafone		Vodafone TV	2008	118	11	1	~
IT [14]	1	Telecom Italia Spa	Telecom Italia Spa	l'IPTV di Telecom Italia	2005	27	0	29	121 (12.2013)
LT	9	Teo Lt, AB	Teliasonera AB	Gala TV	2006	163	10	2	124 (10.2014)
LU	2	Post Luxembourg [15]	Post Luxembourg	Post TV	2008	204	28	1	34 (12.2013)
LV	2	Lattelecom SIA	Latvian State/ TeliaSonera	Interaktiva TV	2007	169	13	2	260 (12.2012) [16]
		Livas Telecommunications	Livas SIA	Livas IPTV	2009	157	6	0	~
ME	2	Crnogorski Telekom	Deutsche Telekom AG	Extra TV	2007	77		2	56 (12.2012)
MK	1	Makedonski Telekom	Deutsche Telekom AG	Max TV	2008	132	10		88 (12.2013)
MT	1	GO plc		GO Interactive TV	2011	107	13		6 (12.2013)
NL	7	Koninklijke Kpn N.V.	KPN	Interactieve TV van KPN	2006	169	13	4	1 216 (12.2012)
		Online.nl [17]	M7 Group S.A.	Online Interactieve TV	2009	>400 [18]	20		193 (03.2011)
		Tele2		Tele2 Televisie	2005	86	16	2	330 (12.2013) *est.*
NO	5	Altibox AS	Lyse Energi	Altibox	2002	163	36	64	300 (12.2013)
		NextGenTel AS	Telio Holding ASA [19]	NextTV	2005	107	10	5	10 (12.2013)
		Telenor ASA		Telenor TV	2010	111	28	1	530 (03.2014)
PL	7	Multimedia Polska S.A.		Telewizja Cyfrowa IPTV	2006	152	32	3	318 (12.2013) [4]
		Netia SA		Telewizja Osobista	2011	178	58	3	127 (03.2014) [4]
		Telefonia Dialog Sp. z o.o. [20]	Netia SA	Dialog Telewizja Cyfrowa	2007	123	15	2	41 (03.2011)
		Orange Polska SA. [21]	France Telecom	Telewizja Tu i Tam	2006	146	38	10	119 (12.2012)
PT	5	Portugal Telecom Sgps, S.A.	Portugal Telecom Sgps, S.A. [22]	Meo	2007	259	46	1	1 200 (12.2013) [8]
		Zon Opimus/NOS [23]	Sonaecom	NOS	2007	150	24	2	671 (12.2012)
		Vodafone Portugal-Comunicaçoes Pessoais, S.A.	Vodafone Group plc	Vodafone TV	2009	131	20	1	~

T.2.18 Main IPTV operators in Europe
December 2014

continued

Country	Total IPTV operators in the country	Company	Group	Name of the service	Date of launch	Number of TV channels	Number of HD channels	Number of on-demand services	Number of IPTV subscribers (thousand)
RO	5	Ines Group Srl	Ines Group	Ines IPTV	2006	183	23	1	~
		Romtelecom (Telekom Romania Communications) [24]	OTE (Deutsche Telekom)	Telekom TV	2009	146	13	1	30 (12.2012)
RU	>10	Comstar-UTS	MTS		2009				~
		Mulltiregion	MTS						~
		OOO "Interaktivnoe televidenie"	Rostelecom [25]	Interactive TV (IPTV)	2009	180	20	1	1 400 (12.2013)
		Corbina (Beeline TV)	Vimpelcom	Beeline TV	2006	248	46	1	1 000 (12.2013)
SE [26]	>10	B2 Bredband Ab	Telenor	Bredbands Bolaget	2005	117	28	6	~
		Canal Digital Sverige Ab	Telenor	Bredbands-tv	2005	94	23	22	284 (12.2012) [4]
		Teliasonera Sverige Ab	TeliaSonera	Telia	2005	105	17	53	641 (12.2013)
SI	6	T - 2 D.O.O.	T-2	T-2 Televizija	2005	271	27	4	75 (12.2013)
		Telekom Slovenije D.D.	Telekom Slovenije D.D.	SiOL TV	2003	232	31	6	130 (12.2013)
SK	4	Orange Slovensko, A.S.	France Telecom	Fiber TV	2006	122	20	11	80 (12.2013)
		T-Com, A.S.	Deutsche Telekom AG	MagioTV	2007	161	28	2	440 (12.2013) [8]
TR	2	TTNET	Türk Telecom	Tivibu	2011	142	27	2	286 (09.2013)
		Turkcell İletişim Hizmetleri A.Ş	Turkcell	Turkcell TV+	2014	52	9		

1. Telefonica sold 65.9% stake in its Czech subsidiary to PPF Group in November 2013.
2. In January 2013 TDC A/S merged with eight subsidiaries: YouSee A/S, TDC Hosting A/S, NetDesign A/S, BluePosition ApS, Onfone Erhverv ApS, Fullrate A/S, Telmore A/S and CompanyMobile A/S, with TDC A/S as the main company.
3. IPTV subscriber numbers include TDC TV & Fullrate customers.
4. Includes Cable TV and IPTV.
5. Jazz Telecom is for sale. An offer from Orange (France Telecom) was considered too low, in September 2014.
6. Includes 6 operators in overseas territories.
7. In 2012 Bouygues Telecom took over Darty Telecom.
8. Includes satellite subscribers.
9. Altice-Numericable took over the major telecoms operator SFR, following approval of the French competition authority in November 2014.
10. TalkTalk TV developed a new IPTV service as part of the YouView Project. Separately, in January 2012 the service Fetch TV from IP Vision closed down.
11. A new service EE TV Now to be launched in Autumn 2014 by the France Télécom/ Deutsche Telekom joint venture Everything Everywhere.
12. In August 2014 Vodafone acquired a majority shareholding in Hellas online.
13. New service launched by Eircom in autumn 2013.
14. The Italian IPTV market collapsed in 2012. Wind closed Infostrada TV in June 2012, and Fastweb TV closed down in November 2012.
15. P&TLuxembourg was rebranded as POST Luxembourg in Autumn 2013.
16. Data included terrestrial TV, interactive TV and Internet television services.
17. In February 2014, M7 Group S.A. acquired all Online.nl customers from Euronet Communications B.V. Euronet was acquired by T-Mobile in 2007 after the takeover of Orange by Deutsche Telekom.
18. This includes numerous free-to-air channels proposed via Canal Digitaal.
19. NextGenTel AS was sold to Telio Holding ASA in January 2013.
20. In December 2011 Netia S.A. acquired Telefonia Dialog S.A. On 30/04/2012 Telefonia Dialog S.A. was transformed into limited liability company – Telefonia Dialog Sp. z o.o. ("Dialog").
21. On 31 December 2013 Telekomunikacja Polska SA, PTK Centertel and Orange Polska sp. z o.o. merged into one company Orange Polska SA.
22. And the end of 2013, Portugal Telecom and Brazilian firm Oi announced their intention to merge. Although this merger is under way, in autumn 2014 there was increasing speculation that Altice may wish to purchase Portugal Telecom.
23. In 2013 Zon Multimedia took over the mobile telecommunications operator Optimus and became Zon Optimus. In 2014, the company and service was re-branded as NOS.
24. Deutsche Telekom has a 40% share in OTE. Via these shares a new branding took place of Romtelecom in September 2014, now following the Deutsche Telekom brand. Romtelecom becomes Telekom Romania Communications.
25. Rostelecom went through a process of restructuring, and taking over smaller companies in 2011. In May 2012, the company merged all IPTV services (e.g. "Domolink TV", "Avangard TV", "J-TV", "U-Tel TV", "Twist TV", "TVi" "Disel TV") under the new brand Interaktive TV (IPTV).
26. In addition to the four Swedish IPTV operators and distributors, several companies distribute IPTV packages in the various municipal open broadband networks (Banhof, Disatra, IPSweden, Kramnet, Serverado, Telge, Viasat etc.).

➡ European Audiovisual Observatory/ MAVISE database/ website and company reports of operators

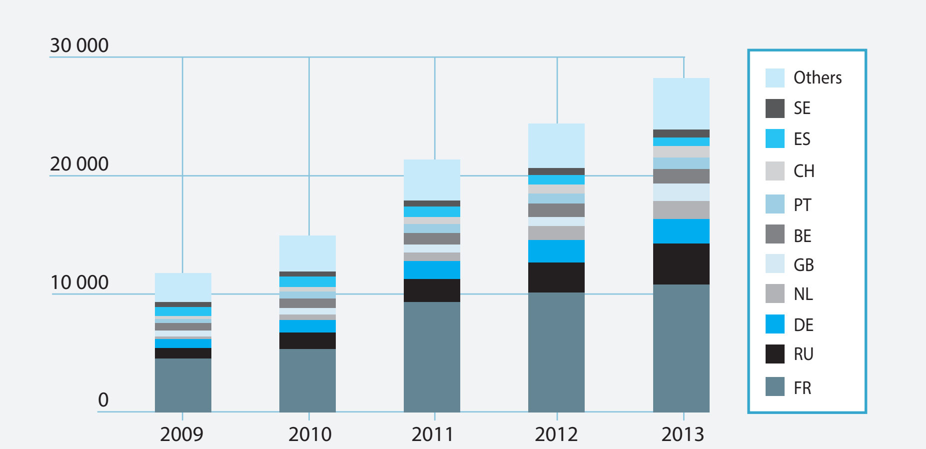
T.2.19 G.2.8 Number of IPTV households in Europe

2009-2013 In thousands.

Country	2009	2010	2011	2012	2013	*2013/12*
AM	0.0	3.0	21.0	34.0	48.0	*41.2%*
AT	101.3	154.3	206.3	232.9	255.4	*9.6%*
BA ❶	~	14.0	53.0	96.0	~	~
BE	593.3	797.1	980.2	1 132.9	1 230.6	*8.6%*
BG	5.4	24.4	48.4	96.3	150.0	*55.9%*
CH	228.0	399.8	572.9	749.1	948.2	*26.6%*
CY	62.0	51.0	49.9	56.6	61.3	*8.3%*
CZ	171.1	169.9	185.6	204.6	227.1	*11.0%*
DE	758.6	1 093.2	1 532.1	1 904.4	2 076.6	*9.0%*
DK	178.0	225.5	291.7	352.4	388.8	*10.3%*
EE	110.0	128.3	144.0	159.6	168.9	*5.8%*
ES	778.5	866.0	901.2	781.3	748.7	*-4.2%*
FI	28.4	76.7	151.5	207.1	260.8	*25.9%*
FR	4 553.5	5 353.1	9 341.7	10 155.0	10 814.1	*6.5%*
GB	497.8	566.3	669.4	773.3	1 478.0	*91.1%*
GR	130.0	120.6	93.0	67.8	65.2	*-3.8%*
HR	236.2	303.0	325.7	345.0	365.5	*6.0%*
HU	78.9	146.5	250.9	346.8	439.6	*26.8%*
IE	10.9	15.7	22.1	27.9	35.5	*27.4%*
IT	658.8	655.1	556.6	188.0	121.0	*-35.7%*
LT	57.8	70.7	83.5	102.5	119.1	*16.2%*
LU	9.0	13.9	21.9	26.9	33.7	*25.3%*
LV	43.6	93.0	120.7	141.0	161.8	*14.8%*
MK	14.2	30.1	40.1	66.5	87.7	*31.8%*
MT	0.0	0.0	1.3	3.8	6.0	*55.2%*
NL	238.7	448.5	739.4	1 160.6	1 513.8	*30.4%*
NO	158.0	199.8	241.5	289.2	318.5	*10.1%*
PL	151.1	181.4	193.8	218.9	263.3	*20.3%*
PT	379.9	581.0	756.6	878.0	985.2	*12.2%*
RO	2.6	32.9	33.1	44.5	53.1	*19.5%*
RU	875.5	1 367.0	1 909.8	2 531.0	3 473.0	*37.2%*
SE	408.7	448.9	511.3	606.7	658.8	*8.6%*
SI	179.0	198.6	213.3	224.4	239.4	*6.7%*
SK	88.9	117.0	132.2	161.6	199.0	*23.1%*
TR	2.1	6.0	46.0	155.8	286.3	*83.8%*
EUR 28	10 511.8	12 932.5	18 557.2	20 600.6	23 120.2	*12.2%*
EUR	11 789.6	14 952.2	21 441.5	24 522.1	28 281.9	*15.3%*

❶ Different source for data for Bosnia and Herzegovina (RAK). No data for Albania, Iceland, Liechtenstein and Montenegro.

➥ IHS, European Audiovisual Observatory



2009-2013 In thousands.

T.2.20
G.2.9

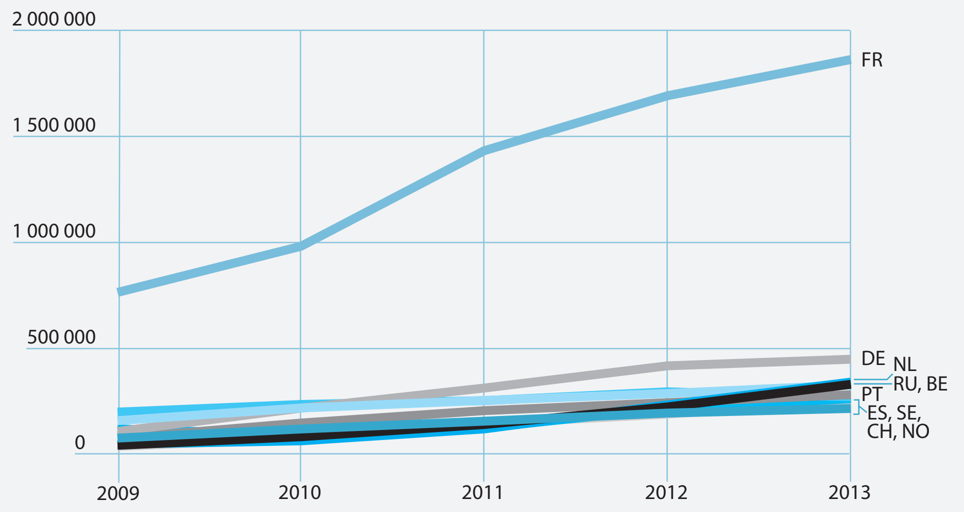
Consumers expenditure for IPTV audiovisual services

2009-2013 EUR thousand. Including VoD.

Country	2009	2010	2011	2012	2013	2013/12
AT	8 747	13 131	19 040	24 511	28 632	16.8%
BE	152 741	212 711	248 483	281 744	321 866	14.2%
BG	176	698	1 445	3 292	5 081	54.3%
CH	30 690	67 814	137 902	183 685	243 910	32.8%
CY	16 393	17 728	17 550	19 285	20 944	8.6%
CZ	41 993	46 386	35 195	32 963	36 703	11.3%
DE	101 374	211 786	307 219	412 605	443 930	7.6%
DK	36 901	53 820	66 300	111 307	129 773	16.6%
EE	7 799	11 994	15 997	18 418	21 058	14.3%
ES	193 335	229 360	247 567	289 415	265 051	-8.4%
FI	5 398	19 578	52 475	90 533	123 646	36.6%
FR	760 933	979 328	1 432 768	1 693 630	1 865 292	10.1%
GB	50 882	63 733	80 552	102 712	127 119	23.8%
GR	27 081	24 186	18 123	14 079	11 985	-14.9%
HR	26 017	44 562	53 308	54 828	64 189	17.1%
HU	9 458	17 665	31 949	48 518	54 989	13.3%
IE	5 039	5 382	7 444	9 840	12 309	25.1%
IT	78 725	84 327	83 820	49 193	9 096	-81.5%
LT	6 122	8 001	9 084	11 614	13 700	18.0%
LU	1 173	2 624	4 592	6 730	9 343	38.8%
LV	4 518	10 663	18 382	24 010	29 759	23.9%
MK	1 831	4 164	5 369	5 888	6 956	18.2%
MT	0	0	195	782	1 535	96.4%
NL	41 110	56 899	113 319	227 407	335 382	47.5%
NO	69 986	113 059	150 102	188 642	210 392	11.5%
PL	20 620	16 994	20 719	23 422	28 389	21.2%
PT	69 653	141 262	200 042	237 937	275 995	16.0%
RO	364	1 157	2 134	2 693	3 353	24.5%
RU	35 588	76 425	134 307	217 745	324 861	49.2%
SE	113 463	84 917	118 353	210 396	256 703	22.0%
SI	15 865	20 271	24 028	26 963	29 965	11.1%
SK	14 897	36 363	40 282	48 972	56 665	15.7%
TR	19	131	1 685	7 061	18 343	159.8%
EUR 28	1 784 760	2 375 128	3 222 424	4 028 858	4 525 221	12.3%
EUR	1 948 891	2 677 119	3 699 727	4 680 819	5 386 916	15.1%

No data for Albania, Bosnia and Herzegovina, Iceland, Liechtenstein and Montenegro.

IHS



2009-2013 EUR thousand.

1
2
3
4
5
6
7
8

T.2.21
G.2.10

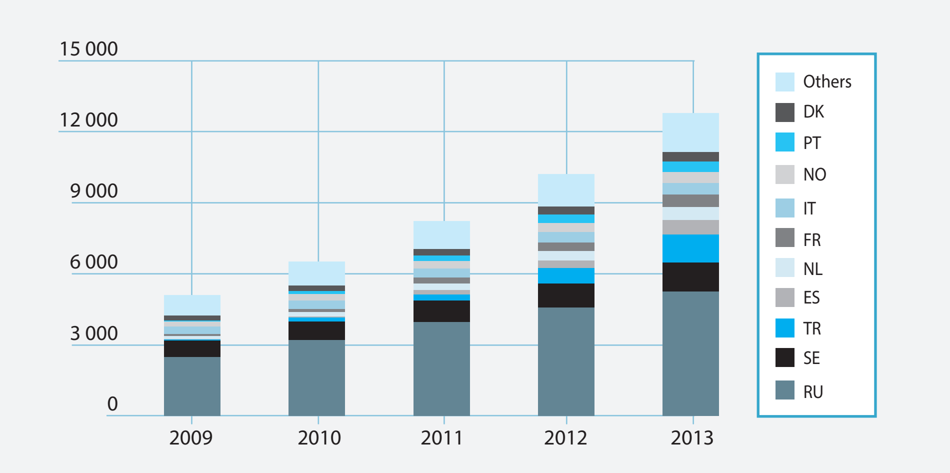
Number of broadband FTTP connections

2009-2013 In thousands.

Country	2009	2010	2011	2012	2013	2013/12
AT	6.4	7.4	12.0	20.7	24.8	*19.7%*
BE	0.6	0.7	0.8	0.8	1.0	*20.1%*
CH	11.0	13.8	16.3	22.0	73.8	*235.1%*
CY	0.0	0.0	0.0	0.0	0.0	–
CZ	109.0	129.0	141.6	145.6	155.4	*6.7%*
DE	0.4	0.7	22.0	46.0	80.0	*73.9%*
DK	223.3	240.0	271.0	336.0	398.0	*18.5%*
EE	71.8	75.7	78.0	80.1	82.1	*2.5%*
ES	15.9	55.4	189.0	332.9	608.6	*82.8%*
FI	39.3	56.6	65.9	77.9	92.3	*18.4%*
FR	70.0	146.0	234.0	341.0	540.0	*58.4%*
GB	0.5	0.7	36.0	80.0	129.3	*61.6%*
GR	2.5	2.7	2.8	2.9	2.9	*1.7%*
HR	~	~	~	~	~	–
HU	0.0	0.0	0.0	0.0	0.0	–
IE	7.2	7.5	9.3	10.9	12.0	*10.1%*
IS	6.9	11.6	17.3	22.5	25.7	*14.3%*
IT	332.0	349.7	394.0	446.0	477.1	*7.0%*
LT	113.6	160.6	206.3	237.6	258.8	*8.9%*
LU	0.4	0.8	1.3	5.7	12.0	*110.5%*
LV	160.5	174.9	189.4	204.0	229.0	*12.3%*
MT	0.0	0.0	0.0	0.0	0.0	–
NL	139.0	184.0	272.0	398.0	547.0	*37.4%*
NO	205.0	261.0	318.0	386.0	466.0	*20.7%*
PL	0.0	0.0	0.0	0.0	0.0	–
PT	30.0	130.0	236.6	362.6	459.0	*26.6%*
RO	95.0	94.0	83.0	100.0	100.0	*0.0%*
RU	2 493.7	3 205.1	3 975.6	4 579.0	5 270.4	*15.1%*
SE	687.0	794.0	906.0	1 034.0	1 218.0	*17.8%*
SI	60.7	70.7	79.9	89.0	95.8	*7.6%*
SK	180.5	200.4	224.0	249.3	266.6	*6.9%*
TR	57.4	154.1	267.1	645.1	1 193.7	*85.0%*
Total EU27 [1]	**2 345.5**	**2 881.5**	**3 654.7**	**4 601.0**	**5 789.6**	***25.8%***
Total EUR	**5 119.5**	**6 527.0**	**8 249.0**	**10 255.6**	**12 819.3**	***25.0%***

[1] Minus Croatia.

IHS



2009-2013 In thousands.

T.2.22 Number of other broadband technology connections

2009-2013 In thousands.

Country	2009	2010	2011	2012	2013	2013/12
AT	38.2	33.6	25.7	21.2	20.0	-5.7%
BE	8.4	8.4	8.5	8.5	8.7	1.7%
CH	5.1	5.3	5.3	5.4	5.4	0.3%
CY	4.5	4.2	6.9	11.5	12.9	12.0%
CZ	672.0	655.0	745.0	844.0	941.0	11.5%
DE	115.7	122.2	122.0	125.0	128.0	2.4%
DK	54.2	81.1	97.1	99.6	102.4	2.8%
EE	53.5	58.2	61.3	62.7	64.1	2.2%
ES	73.3	76.3	99.1	91.8	83.8	-8.7%
FI	54.1	49.3	39.7	33.3	31.1	-6.7%
FR	33.5	69.8	111.9	163.1	258.3	58.4%
GB	50.0	55.6	57.2	58.9	59.3	0.7%
GR	6.0	5.9	3.4	5.2	5.3	1.6%
HR	~	~	~	~	~	~
HU	98.0	105.3	108.3	110.0	113.5	3.2%
IE	104.3	76.1	72.9	66.8	62.0	-7.2%
IS	2.3	2.2	1.6	2.5	2.2	-10.6%
IT	50.0	40.5	35.5	38.3	45.7	19.2%
LT	69.5	88.7	106.8	128.5	172.1	33.9%
LU	2.3	3.0	3.6	2.5	3.0	20.0%
LV	23.5	51.6	72.4	81.6	48.5	-40.6%
MT	4.7	5.7	4.3	3.6	3.0	-16.2%
NL	2.8	2.8	2.8	2.8	2.8	0.0%
NO	36.0	40.9	44.3	46.6	48.1	3.3%
PL	776.9	1 260.0	1 580.0	2 250.0	2 585.5	14.9%
PT	25.0	23.6	1.6	17.2	36.0	109.0%
RO	416.4	369.3	391.9	445.2	556.3	24.9%
RU	0.0	0.0	0.0	0.0	0.0	–
SE	12.1	16.2	17.1	16.8	16.1	-4.1%
SI	4.0	6.3	11.2	11.4	11.0	-3.5%
SK	156.1	191.3	211.8	247.1	263.1	6.5%
TR	7.1	10.4	10.8	10.8	10.6	-2.0%
Total EU27 [1]	2 908.9	3 459.9	3 997.8	4 946.7	5 633.2	13.9%
EUR	2 959.4	3 518.6	4 059.8	5 011.9	5 699.5	13.7%

[1] Minus Croatia.

IHS

T.2.23 Number of broadband DSL connections

2009-2013 In thousands.

Country	Platform	2009	2010	2011	2012	2013	2013/12
AT	DSL	1 284.8	1 415.5	1 521.8	1 557.0	1 620.0	4.0%
	Cable	562.8	583.3	609.2	663.8	688.4	3.7%
	FTTP	6.4	7.4	12.0	20.7	24.8	19.7%
	Other	38.2	33.6	25.7	21.2	20.0	-5.7%
	Total	1 748.8	1 886.6	2 006.5	2 096.9	2 180.8	4.0%
BE	DSL	1 823.4	1 814.5	1 823.9	1 850.0	1 877.0	1.5%
	Cable	1 333.6	1 478.6	1 629.8	1 753.2	1 856.9	5.9%
	FTTP	0.6	0.7	0.8	0.8	1.0	20.1%
	Other	8.4	8.4	8.5	8.5	8.7	1.7%
	Total	2 785.7	2 916.1	3 067.8	3 206.7	3 327.7	3.8%
BG	DSL	309.7	355.4	349.0	395.0	362.2	-8.3%
	Cable	120.0	135.0	146.8	155.2	163.4	5.3%
	FTTP	24.8	33.0	40.0	48.0	65.1	35.7%
	Other	541.4	605.1	628.1	640.6	647.3	1.1%
	Total	810.4	918.8	951.6	1 018.2	1 019.7	0.1%
CH	DSL	1 956.0	2 065.0	2 148.0	2 213.0	2 282.0	3.1%
	Cable	746.2	792.9	863.0	950.5	1 054.8	11.0%
	FTTP	11.0	13.8	16.3	22.0	73.8	235.1%
	Other	5.1	5.3	5.3	5.4	5.4	0.3%
	Total	2 349.1	2 490.6	2 633.3	2 781.0	2 982.3	7.2%
CY	DSL	161.9	179.5	196.9	208.3	216.7	4.0%
	Cable	8.5	16.7	25.7	33.7	34.4	2.1%
	FTTP	0.0	0.0	0.0	0.0	0.0	–
	Other	4.5	4.2	6.9	11.5	12.9	12.0%
	Total	149.5	173.3	200.2	221.5	230.4	4.0%
CZ	DSL	777.5	858.0	919.1	961.9	965.2	0.3%
	Cable	447.0	518.0	549.7	570.0	582.0	2.1%
	FTTP	109.0	129.0	141.6	145.6	155.4	6.7%
	Other	672.0	655.0	745.0	844.0	941.0	11.5%
	Total	1 722.8	1 859.8	2 024.8	2 165.2	2 265.6	4.6%
DE	DSL	22 462.4	22 903.1	23 169.0	23 085.0	22 983.0	-0.4%
	Cable	2 261.5	2 856.9	3 592.5	4 351.2	5 099.6	17.2%
	FTTP	0.4	0.7	22.0	46.0	80.0	73.9%
	Other	115.7	122.2	122.0	125.0	128.0	2.4%
	Total	21 667.8	22 877.0	23 862.5	24 572.1	25 264.8	2.8%
DK	DSL	1 310.0	1 283.0	1 267.0	1 273.0	1 257.0	-1.3%
	Cable	549.3	559.0	575.8	608.9	646.4	6.1%
	FTTP	223.3	240.0	271.0	336.0	398.0	18.5%
	Other	54.2	81.1	97.1	99.6	102.4	2.8%
	Total	1 824.9	1 849.6	1 893.8	1 991.6	2 073.3	4.1%
EE	DSL	181.0	188.6	198.1	208.5	217.1	4.1%
	Cable	108.0	116.0	122.5	130.0	134.0	3.1%
	FTTP	71.8	75.7	78.0	80.1	82.1	2.5%
	Other	53.5	58.2	61.3	62.7	64.1	2.2%
	Total	327.9	347.1	364.4	382.3	395.2	3.4%
ES	DSL	7 734.3	8 383.9	8 671.0	8 878.9	9 589.2	8.0%
	Cable	1 840.0	1 896.1	1 957.2	1 954.2	2 094.2	7.2%
	FTTP	15.9	55.4	189.0	332.9	608.6	82.8%
	Other	73.3	76.3	99.1	91.8	83.8	-8.7%
	Total	7 729.7	8 477.0	8 998.1	9 060.0	10 000.3	10.4%

T.2.23

Number of broadband DSL connections

2009-2013 In thousands.

continued

Country	Platform	2009	2010	2011	2012	2013	2013/12
FI	DSL	1 265.9	1 234.4	1 258.5	1 272.1	1 372.0	*7.9%*
	Cable	222.7	240.6	263.6	293.0	316.0	*7.8%*
	FTTP	39.3	56.6	65.9	77.9	92.3	*18.4%*
	Other	54.1	49.3	39.7	33.3	31.1	*-6.7%*
	Total	**1 393.0**	**1 415.1**	**1 466.4**	**1 520.4**	**1 650.5**	*8.6%*
FR	DSL	18 491.1	19 742.0	20 991.0	22 069.5	22 748.2	*3.1%*
	Cable	1 070.1	1 143.1	997.0	1 034.0	1 096.0	*6.0%*
	FTTP	70.0	146.0	234.0	341.0	540.0	*58.4%*
	Other	33.5	69.8	111.9	163.1	258.3	*58.4%*
	Total	**13 892.2**	**14 975.8**	**15 861.7**	**16 864.9**	**17 755.5**	*5.3%*
GB	DSL	14 370.0	15 282.9	16 557.8	17 321.9	18 391.9	*6.2%*
	Cable	3 837.8	4 011.1	4 102.9	4 272.2	4 375.7	*2.4%*
	FTTP	0.5	0.7	36.0	80.0	129.3	*61.6%*
	Other	50.0	55.6	57.2	58.9	59.3	*0.7%*
	Total	**16 697.4**	**17 720.9**	**19 019.3**	**19 949.3**	**21 095.2**	*5.7%*
GR	DSL	1 908.3	2 253.0	2 463.8	2 689.1	2 878.6	*7.0%*
	Cable	0.0	0.0	0.0	0.0	0.0	–
	FTTP	2.5	2.7	2.8	2.9	2.9	*1.7%*
	Other	6.0	5.9	3.4	5.2	5.3	*1.6%*
	Total	**1 511.4**	**1 794.9**	**1 973.2**	**2 162.7**	**2 314.9**	*7.0%*
HR	DSL	630.2	720.2	753.9	761.2	776.1	*2.0%*
	Cable	41.1	55.5	70.4	84.6	96.1	*13.6%*
	FTTP	0.0	0.0	0.0	0.0	11.1	–
	Other	13.7	28.1	45.2	44.5	40.7	*-8.7%*
	Total	**567.5**	**670.3**	**732.1**	**748.7**	**781.7**	*4.4%*
HU	DSL	856.3	866.7	856.4	838.5	849.4	*1.3%*
	Cable	967.2	875.0	1 032.0	1 165.0	1 237.0	*6.2%*
	FTTP	0.0	0.0	0.0	0.0	0.0	–
	Other	98.0	105.3	108.3	110.0	113.5	*3.2%*
	Total	**1 775.0**	**1 700.9**	**1 852.6**	**1 971.9**	**2 055.7**	*4.3%*
IE	DSL	715.0	733.8	728.9	727.4	775.5	*6.6%*
	Cable	148.1	199.2	255.4	304.3	338.3	*11.2%*
	FTTP	7.2	7.5	9.3	10.9	12.0	*10.1%*
	Other	104.3	76.1	72.9	66.8	62.0	*-7.2%*
	Total	**800.3**	**863.4**	**929.8**	**982.1**	**1 054.9**	*7.4%*
IS	DSL	97.9	95.4	92.7	89.1	88.4	*-0.8%*
	Cable	0.0	0.0	0.0	0.0	0.0	–
	FTTP	6.9	11.6	17.3	22.5	25.7	*14.3%*
	Other	2.3	2.2	1.6	2.5	2.2	*-10.6%*
	Total	**97.5**	**99.8**	**102.6**	**105.1**	**107.4**	*2.2%*
IT	DSL	12 373.1	13 102.5	13 348.6	13 461.5	13 345.3	*-0.9%*
	Cable	0.0	0.0	0.0	0.0	0.0	–
	FTTP	332.0	349.7	394.0	446.0	477.1	*7.0%*
	Other	50.0	40.5	35.5	38.3	45.7	*19.2%*
	Total	**10 814.4**	**11 579.7**	**11 906.2**	**12 071.8**	**12 057.8**	*-0.1%*
LT	DSL	228.0	213.0	197.4	184.4	176.5	*-4.3%*
	Cable	0.0	0.0	0.0	0.0	0.0	–
	FTTP	113.6	160.6	206.3	237.6	258.8	*8.9%*
	Other	69.5	88.7	106.8	128.5	172.1	*33.9%*
	Total	**584.0**	**625.7**	**660.9**	**483.8**	**529.7**	*9.5%*

1
2
3
4
5
6
7
8

T.2.23 Number of broadband DSL connections
2009-2013 In thousands.

continued

Country	Platform	2009	2010	2011	2012	2013	2013/12
LU	DSL	122.3	141.5	147.0	147.9	146.7	*-0.8%*
	Cable	24.7	30.2	35.4	38.6	41.8	*8.1%*
	FTTP	0.4	0.8	1.3	5.7	12.0	*110.5%*
	Other	2.3	3.0	3.6	2.5	3.0	*20.0%*
	Total	**130.0**	**152.6**	**163.3**	**170.5**	**178.6**	*4.8%*
LV	DSL	188.9	197.3	187.4	154.4	145.9	*-5.5%*
	Cable	80.0	89.5	99.3	110.0	115.2	*4.7%*
	FTTP	160.5	174.9	189.4	204.0	229.0	*12.3%*
	Other	23.5	51.6	72.4	81.6	48.5	*-40.6%*
	Total	**402.2**	**456.5**	**486.8**	**484.1**	**469.3**	*-3.1%*
MT	DSL	52.7	62.9	66.1	68.1	70.1	*2.9%*
	Cable	54.2	53.6	59.1	64.8	70.5	*8.8%*
	FTTP	0.0	0.0	0.0	0.0	0.0	–
	Other	4.7	5.7	4.3	3.6	3.0	*-16.2%*
	Total	**87.1**	**94.5**	**101.8**	**108.7**	**115.8**	*6.5%*
NL	DSL	3 645.0	3 689.0	3 565.0	3 264.0	3 100.0	*-5.0%*
	Cable	2 351.0	2 561.0	2 793.0	2 991.0	3 139.0	*4.9%*
	FTTP	139.0	184.0	272.0	398.0	547.0	*37.4%*
	Other	2.8	2.8	2.8	2.8	2.8	*0.0%*
	Total	**5 207.6**	**5 526.7**	**5 776.7**	**5 852.6**	**6 004.0**	*2.6%*
NO	DSL	1 032.2	982.7	984.1	987.5	980.7	*-0.7%*
	Cable	415.4	480.3	524.3	563.5	587.8	*4.3%*
	FTTP	205.0	261.0	318.0	386.0	466.0	*20.7%*
	Other	36.0	40.9	44.3	46.6	48.1	*3.3%*
	Total	**1 539.5**	**1 615.4**	**1 714.6**	**1 820.0**	**1 911.5**	*5.0%*
PL	DSL	2 792.5	2 801.1	2 816.2	2 801.9	2 781.1	*-0.7%*
	Cable	1 525.0	1 690.0	1 879.0	2 084.0	2 532.0	*21.5%*
	FTTP	0.0	0.0	0.0	0.0	0.0	–
	Other	776.9	1 260.0	1 580.0	2 250.0	2 585.5	*14.9%*
	Total	**4 590.4**	**5 101.4**	**5 528.1**	**6 189.1**	**6 853.2**	*10.7%*
PT	DSL	1 108.7	1 119.3	1 098.9	1 088.0	1 112.0	*2.2%*
	Cable	761.7	860.2	901.2	949.0	969.0	*2.1%*
	FTTP	30.0	130.0	236.6	362.6	459.0	*26.6%*
	Other	25.0	23.6	1.6	17.2	36.0	*109.0%*
	Total	**1 685.9**	**1 891.1**	**2 006.1**	**2 181.3**	**2 333.6**	*7.0%*
RO	DSL	813.0	1 008.6	1 157.0	1 216.0	1 270.0	*4.4%*
	Cable	1 514.0	1 656.0	1 841.0	2 015.0	2 217.0	*10.0%*
	FTTP	95.0	94.0	83.0	100.0	100.0	*0.0%*
	Other	416.4	369.3	391.9	445.2	556.3	*24.9%*
	Total	**2 429.3**	**2 693.0**	**3 000.7**	**3 268.7**	**3 589.7**	*9.8%*
RU	DSL	7 042.5	8 717.7	11 085.7	12 714.8	13 693.6	*7.7%*
	Cable	2 960.0	4 060.0	5 120.0	6 050.0	6 665.0	*10.2%*
	FTTP	2 493.7	3 205.1	3 975.6	4 579.0	5 270.4	*15.1%*
	Other	0.0	0.0	0.0	0.0	0.0	–
	Total	**10 196.9**	**13 153.9**	**16 831.2**	**19 585.5**	**21 759.1**	*11.1%*

T.2.23

Number of broadband DSL connections

2009-2013 In thousands.

continued

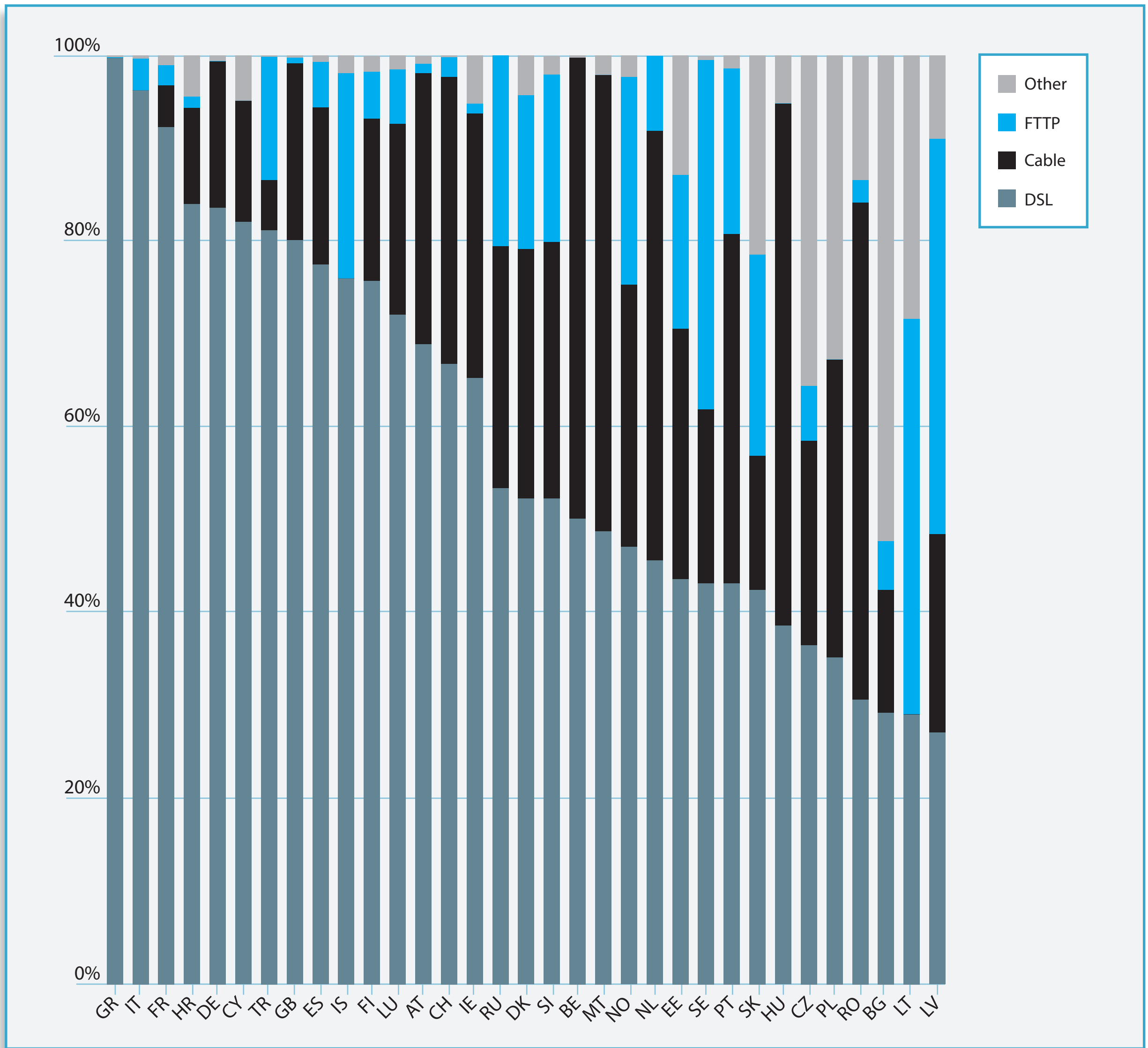
Country	Platform	2009	2010	2011	2012	2013	2013/12
SE	DSL	1 666.0	1 591.0	1 515.0	1 437.0	1 398.0	***-2.7%***
	Cable	578.6	594.5	605.1	593.0	605.3	***2.1%***
	FTTP	687.0	794.0	906.0	1 034.0	1 218.0	***17.8%***
	Other	12.1	16.2	17.1	16.8	16.1	***-4.1%***
	Total	**2 726.4**	**2 776.7**	**2 823.0**	**2 856.8**	**3 001.5**	***5.1%***
SI	DSL	287.1	288.0	284.3	279.8	278.3	***-0.5%***
	Cable	106.0	119.0	134.0	145.0	147.0	***1.4%***
	FTTP	60.7	70.7	79.9	89.0	95.8	***7.6%***
	Other	4.0	6.3	11.2	11.4	11.0	***-3.5%***
	Total	**389.1**	**411.7**	**433.9**	**448.1**	**455.1**	***1.6%***
SK	DSL	391.2	436.0	463.0	481.0	522.0	***8.5%***
	Cable	98.0	115.0	137.5	161.5	177.1	***9.7%***
	FTTP	180.5	200.4	224.0	249.3	266.6	***6.9%***
	Other	156.1	191.3	211.8	247.1	263.1	***6.5%***
	Total	**649.4**	**742.4**	**827.7**	**915.5**	**991.6**	***8.3%***
TR	DSL	6 216.0	6 660.0	6 830.0	7 000.0	7 300.0	***4.3%***
	Cable	146.6	273.9	460.5	501.0	486.5	***-2.9%***
	FTTP	57.4	154.1	267.1	645.1	1 193.7	***85.0%***
	Other	7.1	10.4	10.8	10.8	10.6	***-2.0%***
	Total	**4 683.1**	**5 428.2**	**5 992.2**	**6 611.5**	**7 452.5**	***12.7%***
EUR 28	***DSL***	***97 950.5***	***102 864.5***	***106 572.0***	***108 681.2***	***111 224.9***	***2.3%***
	Cable	***20 610.9***	***22 453.0***	***24 415.1***	***26 525.3***	***28 772.2***	***8.5%***
	FTTP	***2 370.3***	***2 914.5***	***3 694.7***	***4 649.0***	***5 865.8***	***26.2%***
	Other	***3 464.0***	***4 093.0***	***4 671.1***	***5 631.7***	***6 321.2***	***12.2%***
	Total	***105 100.3***	***112 498.6***	***118 919.9***	***123 945.5***	***130 046.0***	***4.9%***

➥ IHS

G.2.11

Households with broadband connections by platform

2013 In %.



2013 In %.

➥ European Audiovisual Observatory

T.2.24 Number of households with PC

2009-2013 In thousands.

Country	2009	2010	2011	2012	2013	2013/12
AT	2 733.5	2 757.8	2 842.5	2 974.5	3 044.1	2.3%
BE	3 356.4	3 434.3	3 500.8	3 558.2	3 609.5	1.4%
BG	1 102.9	1 251.8	1 386.0	1 502.4	1 582.2	5.3%
CH	2 917.4	3 000.1	3 070.3	3 129.2	3 179.9	1.6%
CY	229.3	237.6	246.4	259.2	269.2	3.8%
CZ	2 582.2	2 954.0	3 150.2	3 277.6	3 352.6	2.3%
DE	31 873.1	32 848.4	33 670.0	34 055.6	34 435.3	1.1%
DK	2 288.6	2 308.1	2 323.9	2 336.2	2 347.8	0.5%
EE	400.3	410.1	417.8	425.3	433.1	1.8%
ES	10 990.1	11 456.5	11 811.2	12 057.0	12 264.2	1.7%
FI	2 000.7	2 041.0	2 069.4	2 087.2	2 114.1	1.3%
FR	17 941.3	18 896.6	20 095.3	21 369.5	22 379.1	4.7%
GB	21 392.7	22 363.0	23 199.3	24 003.4	24 773.4	3.2%
GR	2 057.1	2 258.9	2 437.0	2 436.6	2 569.2	5.4%
HR	~	~	~	~	~	~
HU	2 500.9	2 605.0	2 701.5	2 778.0	2 852.3	2.7%
IE	1 143.0	1 210.8	1 313.9	1 336.2	1 378.5	3.2%
IS	108.5	111.6	114.7	117.8	119.4	1.4%
IT	13 195.3	14 018.2	14 678.1	15 237.5	15 694.0	3.0%
LT	722.3	751.5	782.9	822.3	839.0	2.0%
LU	173.4	183.0	190.4	196.4	201.7	2.7%
LV	569.7	609.3	650.7	679.0	706.5	4.1%
MT	91.3	100.7	108.3	113.5	115.8	2.0%
NL	6 693.9	6 862.2	6 921.6	6 988.7	7 034.8	0.7%
NO	1 930.6	1 976.7	2 006.0	2 026.7	2 045.1	0.9%
PL	8 687.0	9 046.0	9 355.4	9 621.0	9 853.1	2.4%
PT	2 335.7	2 586.8	2 807.6	2 997.5	3 183.8	6.2%
RO	3 265.2	3 417.4	3 537.9	3 665.3	4 001.6	9.2%
RU	21 328.4	23 968.3	26 376.2	28 376.2	30 239.1	6.6%
SE	3 895.7	3 945.9	3 993.7	4 033.6	4 072.6	1.0%
SI	495.6	500.7	525.0	533.1	538.6	1.0%
SK	1 629.0	1 706.0	1 763.4	1 798.4	1 835.5	2.1%
TR	5 706.6	6 381.1	7 568.8	7 879.9	8 199.5	4.1%
Total EU27 [1]	144 346.2	150 761.6	156 480.3	161 142.9	165 481.4	2.7%
EU	176 337.7	186 199.5	195 616.3	202 672.7	209 264.4	3.3%

[1] Minus Croatia.

IHS

T.2.25
G.2.12

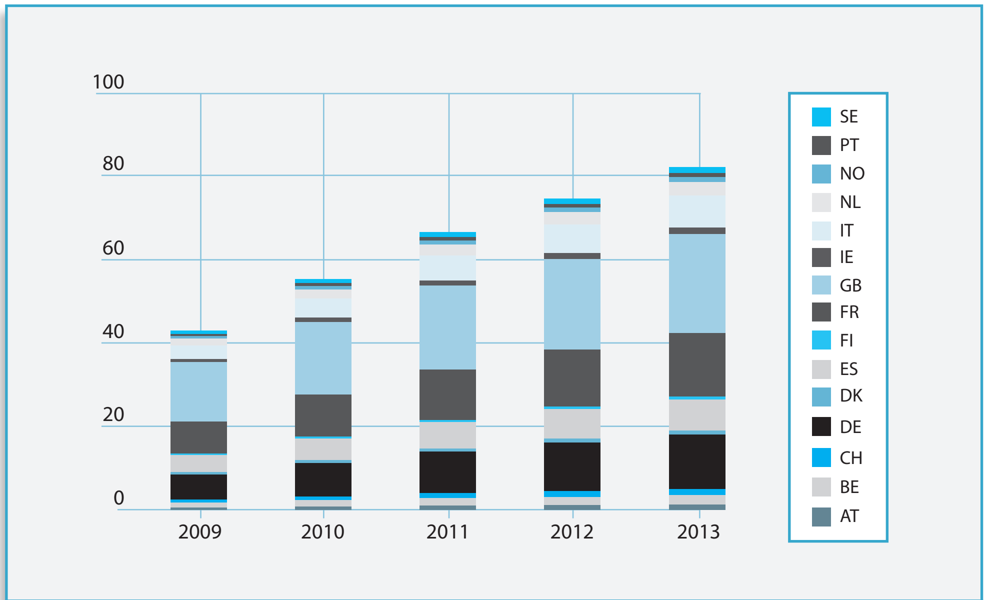
PS3, Xbox 360, Wii, PS4, Xbox One, Wii U Total: Installed base

2009-2013

Installed base is cumulative sell-through to consumers.
In millions.

Country	2009	2010	2011	2012	2013	2013/12
AT	0.6	0.8	1.0	1.1	1.3	***12.2%***
BE	1.2	1.5	1.8	2.0	2.2	***9.3%***
CH	0.7	0.9	1.2	1.4	1.5	***10.7%***
DE	6.0	8.0	9.9	11.6	13.0	***12.1%***
DK	0.6	0.7	0.8	1.0	1.0	***9.6%***
ES	4.0	5.2	6.3	7.0	7.5	***7.7%***
FI	0.4	0.5	0.6	0.7	0.7	***10.0%***
FR	7.7	10.0	12.1	13.6	15.2	***11.3%***
GB	14.2	17.5	20.1	21.8	23.8	***9.4%***
IE	0.8	1.0	1.3	1.4	1.5	***11.1%***
IT	3.2	4.6	5.9	6.9	7.7	***11.7%***
NL	1.7	2.2	2.7	3.0	3.3	***9.2%***
NO	0.6	0.8	0.9	1.0	1.1	***10.2%***
PT	0.5	0.7	0.9	0.9	1.0	***7.1%***
SE	0.8	1.0	1.2	1.3	1.5	***10.5%***
EU	**43.3**	**55.8**	**67.1**	**75.4**	**83.2**	***10.4%***

IHS Games Intelligence



2009-2013 In millions.

T.2.26

Smart TV households

2009-2013 In thousands.

Country	2009	2010	2011	2012	2013	2013/12
AT	39.9	199.6	386.8	600.5	821.9	36.9%
BE	39.9	130.9	338.4	568.4	817.3	43.8%
BG	2.1	11.2	66.8	165.3	262.3	58.7%
CH	45.6	220.7	501.4	776.2	1 053.9	35.8%
CY	1.8	7.0	23.7	45.6	69.3	52.0%
CZ	7.4	37.0	177.4	393.9	595.1	51.1%
DE	598.8	2 381.0	5 129.7	8 326.1	11 680.9	40.3%
DK	58.7	170.7	381.2	584.9	783.9	34.0%
EE	0.5	2.6	15.3	37.9	59.5	56.9%
ES	100.7	465.3	953.2	1 560.7	2 221.5	42.3%
FI	23.9	74.8	184.9	298.3	424.9	42.5%
FR	358.3	1 108.7	2 602.7	4 460.8	6 168.9	38.3%
GB	457.7	1 284.0	2 341.8	3 881.5	5 375.6	38.5%
GR	8.6	37.7	112.4	219.5	347.0	58.1%
HR	0.7	4.1	40.3	91.1	142.1	56.0%
HU	3.5	17.7	103.9	250.0	391.7	56.7%
IE	13.8	45.2	110.1	184.4	267.4	45.0%
IS	1.8	5.7	18.0	30.5	42.0	37.4%
IT	125.8	459.6	1 073.7	1 906.3	2 838.1	48.9%
LT	2.2	9.7	47.2	115.7	179.4	55.0%
LU	3.9	13.2	31.9	50.5	68.1	34.7%
LV	0.5	3.1	21.6	56.3	89.9	59.6%
MT	1.0	3.7	10.7	20.4	30.6	49.9%
NL	150.4	487.3	973.5	1 657.0	2 414.1	45.7%
NO	47.0	143.5	343.2	535.1	713.1	33.3%
PL	49.1	161.5	589.3	1 270.5	1 884.0	48.3%
PT	17.0	61.8	164.4	300.3	450.8	50.1%
RO	5.4	25.5	143.1	371.2	593.1	59.8%
RU	45.8	234.6	1 423.8	3 590.5	6 264.4	74.5%
SE	55.8	178.4	458.2	749.6	1 041.9	39.0%
SI	0.3	2.0	12.7	31.2	51.7	65.9%
SK	1.2	8.4	62.4	167.8	301.0	79.4%
TR	10.8	55.9	367.5	949.2	1 523.4	60.5%
Total EU28	2 129.0	7 391.8	16 557.2	28 365.7	40 372.0	42.3%
EUR	2 280.0	8 052.2	19 211.1	34 247.2	49 968.9	45.9%

IHS

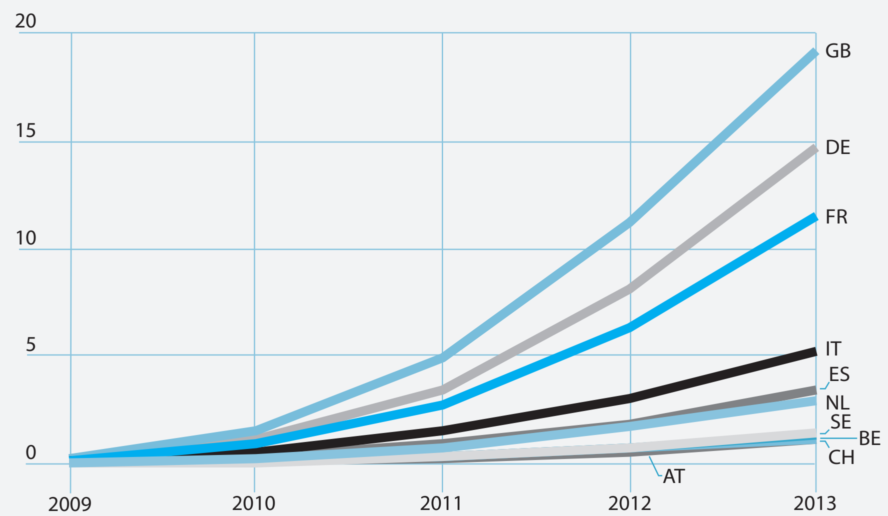
T.2.27
G.2.13

Tablet installed base

2009-2013 In millions.

Country	2009	2010	2011	2012	2013	*2013/12*
AT	0.0	0.1	0.2	0.5	1.1	***101.3%***
BE	0.0	0.1	0.3	0.7	1.3	***93.9%***
CH	0.0	0.1	0.3	0.7	1.1	***60.2%***
DE	0.2	1.1	3.4	8.1	14.7	***82.2%***
DK	0.0	0.0	0.1	0.4	0.9	***128.7%***
ES	0.1	0.3	0.9	1.8	3.4	***88.0%***
FI	0.0	0.0	0.1	0.4	0.9	***111.9%***
FR	0.1	0.9	2.7	6.3	11.5	***83.6%***
GB	0.2	1.5	4.9	11.2	19.2	***71.4%***
GR	0.0	0.0	0.1	0.3	0.5	***90.6%***
IE	0.0	0.1	0.2	0.4	0.6	***55.6%***
IT	0.1	0.5	1.5	3.0	5.2	***71.2%***
NL	0.0	0.2	0.7	1.7	2.9	***69.9%***
NO	0.0	0.0	0.1	0.3	0.6	***80.1%***
PT	0.0	0.0	0.1	0.3	0.6	***91.3%***
SE	0.0	0.0	0.3	0.7	1.4	***83.2%***
EUR 14	**0.8**	**5.0**	**16.2**	**36.8**	**65.8**	***78.7%***

IHS



2009-2013 In millions.

CHAPTER
CHAPITRE
KAPITEL
3

Economic trends of the broadcasting sector

Tendances économiques du secteur de la radio-télévision

Wirtschaftliche Trends im Hörfunk- und Fernsehsektor

Radio and television companies

Entreprises de radio et télévision

Rundfunkunternehmen

Broadcasters in recession

Broadcasting companies are divided into six main categories: public broadcasting companies, companies that broadcast generalist channels funded by advertising, companies that broadcast special-interest channels, companies that broadcast teleshopping channels, regional or local private television companies, and private radio broadcasters. Our analysis excludes companies that are both channel providers and operators of satellite distribution platforms (BSkyB, Sky Italia, Sky Deutschland, Canal+ Distribution, etc.). In these companies' accounts (where they are available), it is impossible to distinguish between revenue from channel and distribution activities. We have made the assumption that distribution was the main area of activity and therefore included this type of company in chapter 3. These companies are in competition with those that operate other distribution platforms (cable, IPTV, digital terrestrial pay-TV, transmission to mobiles). [1]

The average annual growth rate across the whole sector for the 2009-2013 period was very low: 0.7%. For the second time, the sector posted a recession in 2013 (-2.5% in 2012, -1% in 2013)(T.1.3.).

Providers of special interest channels, which are mainly funded by subscription revenues, have experienced average annual growth of 3.8 %. Whereas they fell in 2012 (-2.4%), they returned to growth in 2013 (0.8%). Providers of shopping channels enjoyed a period of average annual growth of 3.5%, but that growth has tailed off over the years, falling from 6.4% in 2009 to 0.8% in 2013. TV companies financed by advertising saw an annual average growth rate of 1.3% but faced their second year of recession (-2.6% in 2012, -2.3% in 2013). The decline is even more marked in the case of local television stations, which are generally also funded by advertising: they posted their third year of recession and an annual average growth rate of -3.8%. The public radio-television companies experienced a third year of recession with public broadcasters in Spain, Latvia, Italy and Portugal being the most affected. (T.3.3). The average yearly growth during the period was negative (-0,7 %).

Les entreprises de radio-télévision en récession

Les entreprises de radio-télévision sont réparties en 6 grandes familles : entreprises publiques de radio-télévision, entreprises éditrices de chaînes généralistes financées par la publicité, entreprises éditrices de chaînes thématiques, entreprises éditrices de chaînes de téléachat, entreprises de télévisions privées régionales ou locales, entreprises privées de radio. Nous avons exclu du champ de l'analyse les entreprises qui sont à la fois éditrices et opérateurs de plates-formes de distribution par satellite (BSkyB, Sky Italia, Sky Deutschland, Canal+ Distribution, etc.). Les comptes de ces entreprises (lorsqu'ils sont disponibles…) ne permettent pas de distinguer quelles sont les parts respectives du produit d'exploitation réalisé dans les activités d'édition et de distribution. Nous avons pris pour hypothèse que l'activité principale était la distribution et donc reporté ce type d'entreprise dans le chapitre 2. Ces entreprises se trouvent en effet en concurrence avec les entreprises gérant d'autres plates-formes de distribution (câble, IPTV, numérique terrestre payant, diffusion vers les mobiles). [1]

Le taux de croissance annuel moyen de l'ensemble de la branche sur la période 2009-2013 a été très faible : 0.7 %. Pour la deuxième fois en 2013, la branche a enregistré une récession (-2,5 % en 2012, -1 % en 2013)(T.1.3.).

Les entreprises éditrices de chaînes thématiques, financées essentiellement par les revenus d'abonnements ont connu une croissance annuelle moyenne de 3,8 %. Alors qu'elles avaient été en recul en 2012 (-2,4 %) elles ont renoué avec la croissance (0,8%) en 2013. Les entreprises éditrices de chaînes de téléachat ont connu sur la période un taux de croissance annuel moyen de 3,5 %, mais la croissance s'essouffle au fil des ans : de 6,4 % en 2009, elle est tombée à 0,8 % en 2013. Les entreprises de télévision financées par la publicité ont connu un taux de croissance annuel moyen de 1,3 %, mais ont enregistré leur deuxième année de récession (-2,6 % en 2012, -2,3 % en 2013). Le déclin est plus marqué encore pour les télévisions locales, généralement elles aussi financées par la publicité : elles enregistrent leur troisième année de récession et un taux de croissance annuel moyen de -3,8 %. Les entreprises publiques de radio-télévision ont connu leur troisième année de récession, les diffuseurs d'Espagne, Lettonie, Italie et Portugal étant les plus affectés (T.3.3). Le taux de croissance annuel moyen sur la période a été négatif (-0,7%).

Rückläufige Einnahmen bei Hörfunk- und Fernsehunternehmen

Die Hörfunk- und Fernsehunternehmen lassen sich in sechs große Gruppen unterteilen: öffentlich-rechtliche Rundfunkunternehmen, Veranstalter von werbefinanzierten Vollprogrammen, Veranstalter von Spartenprogrammen, Betreiber von Teleshopping-Kanälen, regionale und lokale Privatfernsehunternehmen sowie private Hörfunkunternehmen. Unternehmen, die sowohl Satellitenplattformen als auch deren Dienste betreiben (BSkyB, Sky Italia, Sky Deutschland, Canal+ Distribution u. a.), wurden aus dieser Untersuchung ausgeschlossen. Sofern die Jahresabschlüsse dieser Unternehmen verfügbar sind, erlauben sie es nicht zu unterscheiden, welcher Teil des Betriebsertrags jeweils dem technischen und dem inhaltlichen Bereich zuzuschreiben ist. Wir sind davon ausgegangen, dass die Verbreitung das Kerngeschäft ausmacht, weshalb wir diesen Unternehmenstyp in Kapitel 3 behandeln. Diese Unternehmen stehen nämlich in Konkurrenz zu den Betreibern anderer Verbreitungsplattformen (Kabel, IPTV, digitales terrestrisches Bezahlfernsehen, Verbreitung auf Mobiltelefonen). [1]

Die durchschnittliche jährliche Wachstumsrate in der gesamten Branche im Zeitraum 2009-2013 war sehr niedrig: 0,7 %. Zum zweiten Mal in Folge erlebte die Branche 2013 eine Rezession (-2,5 % im Jahr 2012, - 1 % 2013) (T.1.3).

Bei den Veranstaltern von Spartenprogrammen, die im Wesentlichen über Abonnements finanziert werden, lag das durchschnittliche jährliche Wachstum in diesem Zeitraum bei 3,8 %. 2012 waren ihre Einnahmen noch zurückgegangen (-2,4 %), 2013 hat das Wachstum wieder etwas angezogen (0,8 %). Die Teleshopping-Kanäle konnten ebenfalls zulegen, und zwar im Schnitt um 3,5 % jährlich, aber das Wachstum hat sich im Laufe der Jahre immer weiter abgeschwächt: Von 6,4 % im Jahr 2009 ist es 2013 auf 0,8 % zurückgegangen. Werbefinanzierte Sender haben über den Zeitraum ein durchschnittliches jährliches Wachstum von 1,3 % ausgewiesen, befanden sich jedoch im zweiten Jahr in Folge in einer Rezession (-2,6 % 2012, -2,3 % 2013). Bei lokalen Sendern, die sich in der Regel ebenfalls durch Werbung finanzieren, ist der Rückgang noch ausgeprägter: Für sie ist es bereits das dritte Jahr in Folge, dass ihre Einnahmen zurückgegangen sind. Sie hatten ein durchschnittliches jährliches Minuswachstum von -3,8 %. Die öffentlich-rechtlichen Fernsehanstalten erlebten ein drittes Rezessionsjahr in Folge, wobei Spanien, Lettland, Italien und Portugal am meisten betroffen waren (T.3.3). Das durchschnittliche jährliche Wachstum in der Zeit war negativ (-0,7%).

[1] It should be noted that when we went to press the 2013 data for some companies, especially local television companies, were not yet available. In these cases, we have postulated operating revenues similar to those for 2012.

T.3.1 The 50 leading European television companies

2010-2013 Unconsolidated operating revenues (EUR million, current rate).

Rank	Company	Country	Activities	2010	2011	2012	2013	2013/12
1	BBC (PSB Group)	GB	TV+RAD	4 097.8	4 648.6	4 645.0	4 822.1	3.8%
2	France Télévisions	FR	TV	4 235.0	4 282.9	4 318.1	4 147.6	-3.9%
3	ProSiebenSat.1 Media AG (cons.)	DE	TV	3 012.2	2 971.2	2 396.6	2 630.7	9.8%
4	RAI	IT	TV+RAD	2 835.2	2 874.3	2 684.0	2 575.9	-4.0%
5	Reti Televisive Italiane R.T.I. (R.T.I.)	IT	TV	2 936.5	2 764.5	2 332.7	2 149.7	-7.8%
6	ZDF	DE	TV	1 965.9	2 109.5	1 961.1	2 101.3	7.1%
7	Canal Plus S.A. (cons.)	FR	TV	~	2 024.0	2 036.0	2 051.0	0.7%
8	RTL Television GmbH	DE	TV	1 562.2	1 554.5	1 615.0	1 663.4	3.0%
9	ITV Broadcasting Ltd	GB	TV	1 470.5	1 468.2	1 729.7	1 549.4	-10.4%
10	TF1	FR	TV	1 660.0	1 626.0	1 525.4	1 424.0	-6.6%
11	SRG-SSR idée suisse (cons.)	CH	TV+RAD	1 321.7	1 387.2	1 383.6	1 337.3	-3.3%
12	WDR - Westdeutscher Rundfunk	DE	TV+RAD	1 333.7	1 347.2	1 282.6	1 301.5	1.5%
13	SWR - Südwestrundfunk	DE	TV+RAD	1 132.1	1 109.0	1 110.9	1 124.8	1.3%
14	Channel 4 (cons.)	GB	TV	1 094.0	1 124.0	1 106.0	1 084.0	-2.0%
15	NDR - Norddeutscher Rundfunk	DE	TV+RAD	1 081.3	1 068.3	1 054.5	1 052.7	-0.2%
16	BR - Bayerischer Rundfunk	DE	TV+RAD	974.8	982.3	1 001.7	1 003.3	0.2%
17	ORF	AT	TV+RAD	948.9	953.1	973.9	992.0	1.9%
18	NPO (1)	NL	TV+RAD	857.0	856.0	954.7	936.6	-1.9%
19	Corporación de Radio y Televisión Española	ES	TV+RAD	1 136.4	1 144.3	921.3	849.0	-7.8%
20	Métropole Télévision (M6)	FR	TV	809.0	809.0	784.0	789.0	0.6%
21	QVC Deutschland (est.)	DE	TV	721.3	824.7	778.1	~	~
22	CLT-UFA S.A.	LU	TV	680.4	748.3	725.9	~	~
p.m.	RTL Nederland B.V.	NL	TV	267.1	289.7	289.3	~	~
p.m.	RTL Belgium	BE	TV	161.8	173.0	164.4	88.1	-46.4%
23	ITV Network Ltd	GB	TV	1 053.6	1 097.8	1 001.7	692.5	-30.9%
24	VGTRK	RU	TV	495.1	586.8	645.0	691.7	7.2%
25	MDR - Mitteldeutscher Rundfunk	DE	TV+RAD	655.5	673.2	666.4	680.8	2.2%
26	Atresmedia Corporación de Medios de Com. S.A.	ES	TV	657.3	633.5	592.3	678.1	14.5%
27	Mediaset España Comunicación S.A.	ES	TV	692.3	859.6	715.8	658.2	-8.0%
p.m.	Gestora de Inversiones Audiovisuales La Sexta S.A. (2)	ES	TV	270.5	213.7	178.1	–	~
p.m.	Sociedad General de Televisión Cuatro S.A. (2)	ES	TV	359.0	–	–	–	~
p.m.	Sogecable (Cuatro) (2)	ES	TV	–	–	–	–	~
28	Pervyi Kanal	RU	TV	600.9	693.3	725.7	654.8	-9.8%
29	NRK	NO	TV+RAD	620.9	632.7	697.1	636.0	-8.8%
30	Viasat Broadcasting UK Ltd	GB	TV	580.4	636.0	622.6	629.1	1.0%
31	Danmarks Radio	DK	TV+RAD	514.5	520.1	530.4	560.1	5.6%
32	Vox Television GmbH	DE	TV	514.7	523.4	554.5	553,8	-0.1%
33	Home Shopping Europe GmbH	DE	TV	439.3	470.0	551.0	~	~
34	Discovery Communications Europe	US	TV	424.7	451.5	479.3	522.2	9.0%
35	Telekompaniya NTV	RU	TV	397.7	488.5	552.4	512.9	-7.2%
36	TRT	TR	TV+RAD	544.4	490.8	585.1	501.5	-14.3%
37	QVC Ltd	GB	TV	453.7	467.1	482.8	500.0	3.6%
38	Sveriges Television AB	SE	TV	463.5	467.7	512.4	493.1	-3.8%
39	TV4 AB	SE	TV	324.2	397.6	449.9	485.8	8.0%
40	HR - Hessischer Rundfunk	DE	TV+RAD	475.3	464.3	463.3	472.3	1.9%
41	YLE	FI	TV+RAD	420.0	432.5	456.1	469.1	2.9%
42	VRT	BE	TV+RAD	448.1	419.7	439.1	455.9	3.8%
43	RBB - Rundfunk Berlin Brandenburg	DE	TV+RAD	403.6	405.9	395.5	420.7	6.4%
44	ARTE France	FR	TV	341.0	360.7	378.2	407.9	7.9%
45	Eurosport	FR	TV	360.8	369.9	399.7	~	~
46	TV2 AS	NO	TV	306.0	365.7	439.6	391.9	-10.9%
47	Channel 5 Broadcasting Ltd	GB	TV	339.2	425.7	389.5	~	~
48	Telewizja Polska S.A.	PL	TV	453.2	383.7	348.6	361.8	3.8%
49	TVN SA.	PL	TV	421.2	858.7	352.9	357.3	1.2%
50	CET 21 (Nova TV)	CZ	TV	379.8	377.3	348.5	~	~

(1) Change of methodology in 2012.
(2) Cuatro was merged with Gestevisión Telecinco under the name of Mediaset España Corporación. The company was dissolved on 27/07/2011. La Sexta was merged in Mediaset España Comunicación in 2012.

➡ European Audiovisual Observatory

T.3.2 The 50 leading European public radio-television companies 2010-2013

Unconsolidated operating revenues (EUR million, current rate).

Rank	Company	Country	Activities	2010	2011	2012	2013	2013/12
1	BBC (PSB Group)	**GB**	TV+RAD	4 097.8	4 648.6	4 645.0	4 822.1	***3.8%***
2	France Télévisions	**FR**	TV	4 235.0	4 282.9	4 318.1	4 147.6	***-3.9%***
3	RAI	**IT**	TV+RAD	2 835.2	2 874.3	2 684.0	2 575.9	***-4.0%***
4	ZDF	**DE**	TV	1 965.9	2 109.5	1 961.1	2 101.3	***7.1%***
5	SRG-SSR idée suisse (cons.)	**CH**	TV+RAD	1 321.7	1 387.2	1 383.6	1 337.3	***-3.3%***
6	WDR - Westdeutscher Rundfunk	**DE**	TV+RAD	1 333.7	1 347.2	1 282.6	1 301.5	***1.5%***
7	SWR -Südwestrundfunk	**DE**	TV+RAD	1 132.1	1 109.0	1 110.9	1 124.8	***1.3%***
8	Channel 4 (cons.)	**GB**	TV	1 094.0	1 124.0	1 106.0	1 084.0	***-2.0%***
9	NDR - Norddeutscher Rundfunk	**DE**	TV+R	1 081.3	1 068.3	1 054.5	1 052.7	***-0.2%***
10	BR - Bayerischer Rundfunk	**DE**	TV+RAD	974.8	982.3	1 001.7	1 003.3	***0.2%***
11	ORF	**AT**	TV+RAD	948.9	953.1	973.9	992.0	***1.9%***
12	NPO [1]	**NL**	TV+RAD	857.0	856.0	954.7	936.6	***-1.9%***
13	Corporación de Radio y Televisión Española	**ES**	TV+RAD	1 136.4	1 144.3	921.3	849.0	***-7.8%***
14	VGTRK	**RU**	TV	495.1	586.8	645.0	691.7	***7.2%***
15	MDR - Mitteldeutscher Rundfunk	**DE**	TV+RAD	655.5	673.2	666.4	680.8	***2.2%***
16	Pervyi Kanal	**RU**	TV	600.9	693.3	725.7	654.8	***-9.8%***
17	NRK	**NO**	TV+RAD	620.9	632.7	697.1	636.0	***-8.8%***
18	Danmarks Radio	**DK**	TV+RAD	514.5	520.1	530.4	560.1	***5.6%***
19	TRT	**TR**	TV+RAD	544.4	490.8	585.1	501.5	***-14.3%***
20	Sveriges Television AB	**SE**	TV	463.5	467.7	512.4	493.1	***-3.8%***
21	HR - Hessischer Rundfunk	**DE**	TV+RAD	475.3	464.3	463.3	472.3	***1.9%***
22	YLE	**FI**	TV+RAD	420.0	432.5	456.1	469.1	***2.9%***
23	VRT	**BE**	TV+RAD	448.1	419.7	439.1	455.9	***3.8%***
24	RBB - Rundfunk Berlin Brandenburg	**DE**	TV+RAD	403.6	405.9	395.5	420.7	***6.4%***
25	ARTE France	**FR**	TV	341.0	360.7	378.2	407.9	***7.9%***
26	Telewizja Polska S.A.	**PL**	TV	453.2	383.7	348.6	361.8	***3.8%***
27	RTBF	**BE**	TV+R	312.4	320.2	334.2	340.7	***1.9%***
28	Televisió de Catalunya	**ES**	TV	392.8	386.5	328.3	330.3	***0.6%***
29	RTE	**IE**	TV+RAD	371.7	350.9	337.2	327.6	***-2.9%***
30	Deutsche Welle	**DE**	TV+R	291.4	291.9	299.7	317.2	***5.8%***
31	MTVA	**HU**	TV+R	–	329.2	336.8	299.9	***-10.9%***
p.m.	Magyar Televisio - MTV	**HU**	TV	79.4	–	–	–	–
32	France Médias Monde	**FR**	TV+RAD	262.4	274.6	283.1	266.3	***-5.9%***
33	Ceska Televisie	**CZ**	TV	266.4	240.4	259.6	239.4	***-7.8%***
34	Rádio e Televisão de Portugal	**PT**	TV+R	308.6	317.1	257.3	234.7	***-8.8%***
35	TV2/Danmark A/S	**DK**	TV	186.7	200.8	214.3	210.4	***-1.8%***
36	Hrvatska Radiotelevizija	**HR**	TV+R	196.2	187.9	188.0	181.4	***-3.5%***
37	TVR - Televizune Romania	**RO**	TV	130.7	132	~	~	~
38	RTVSLO	**SI**	TV+R	133.5	130.7	131.8	~	~
39	TV5 Monde	**FR**	TV	103.6	107.5	116.3	111.9	***-3.8%***
40	Canal Sur Televisión S.A.	**ES**	TV	179.9	155.6	116.9	111.5	***-4.7%***
41	RSTV	**SK**	TV+R	–	122.5	~	101.0	~
p.m.	STV-Slovenska Televizija	**SK**	TV	72.1	–	–	–	–
42	S4C	**GB**	TV	122.3	108.8	101.0	100.4	***-0.6%***
43	Euskal Telebista Televisión Vasca	**ES**	TV	134.9	131.6	112.0	97.9	***-12.6%***
44	SR	**DE**	TV+R	78.4	79.2	78.1	81.4	***4.2%***
45	Euronews	**FR**	TV	60.6	68.9	75.5	78.2	***3.5%***
46	TV2 Zulu A/S	**DK**	TV	69.7	73.2	71.6	73.3	***2.4%***
47	Joint Stock Company Channel One Worldwide	**RU**	TV	39.1	47.0	60.9	57.4	***-5.7%***
48	Stichting Radio Nederland Wereldomroep	**NL**	TV+R	52.7	52.2	51.5	~	~
49	Radio Bremen	**DE**	TV+R	48.9	49.1	47.9	50.6	***5.7%***
50	Television Autonomica de Aragon	**ES**	TV	3.9	3.1	2.8	39.1	***1 296.4%***
p.m.	ERT [2]	**GR**	TV+RAD	336.8	318.8	~	~	–

[1] Change of methodology and source in 2012.
[2] Dissolved in June 2013.
Not available: NERIT (GR).

➥ OBS from data provided by EBU-M.I.S, AMADEUS database and company annual reports.

T.3.3
G.3.1

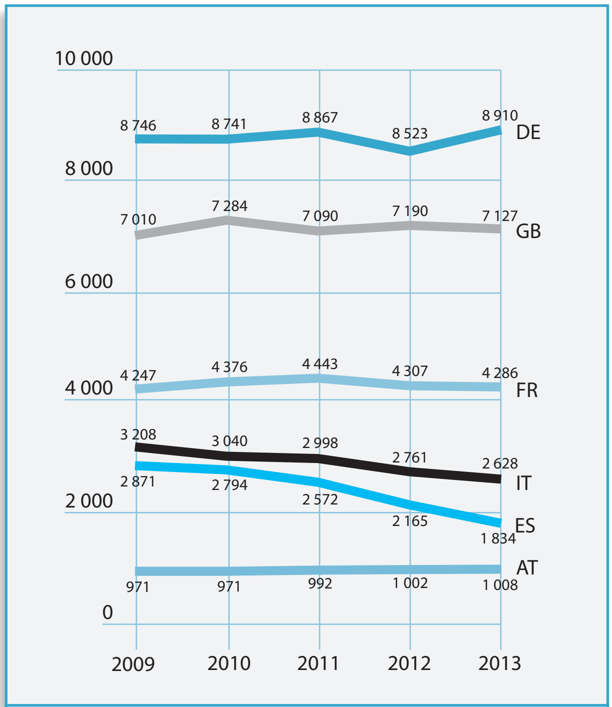
Revenues of public radio-television companies in the European Union (EUR 28)

2010-2013 EUR million.

Revenues [1]

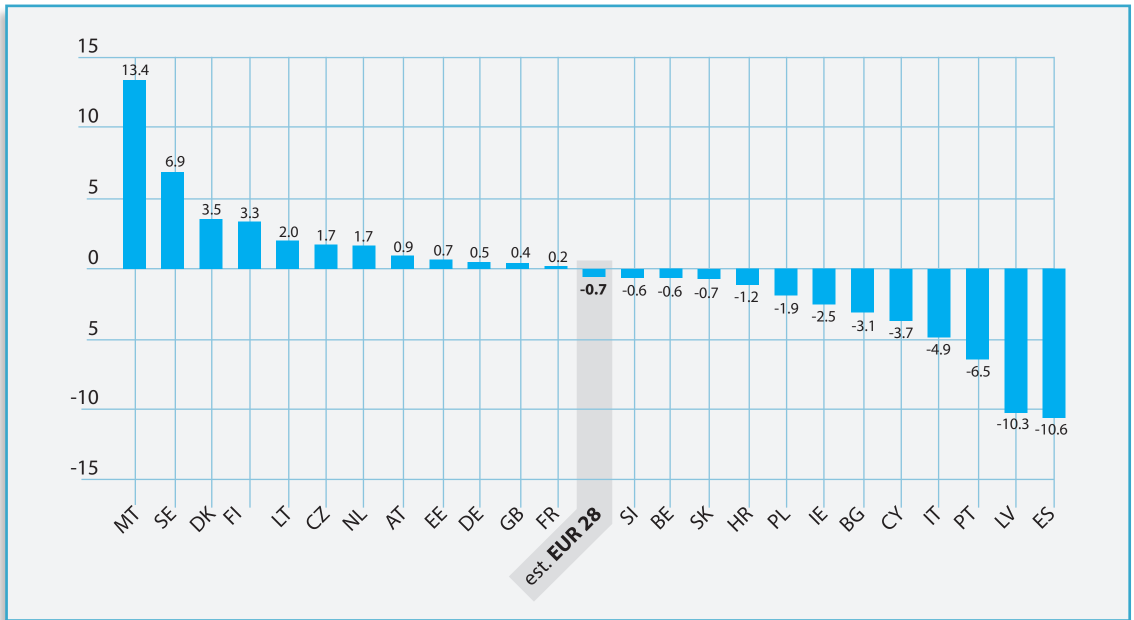
Country	2010	2011	2012	2013	2013/12
AT	971.2	991.5	1 001.9	1 008.1	0.6%
BE	787.8	776.5	796.6	778.8	-2.2%
BG	65.8	63.9	65.3	61.0	-6.6%
CY	45.0	36.8	37.7	30.8	-18.3%
CZ	362.9	365.9	363.5	371.0	2.1%
DE	8 740.8	8 867.2	8 523.4	8 909.7	4.5%
DK	801.0	828.8	860.7	889.6	3.4%
EE	28.4	28.3	28.5	30.5	7.0%
ES	2 794.0	2 572.0	2 165.0	1 833.5	-15.3%
FI	420.1	432.5	456.1	469.1	2.9%
FR	4 375.5	4 443.1	4 307.0	4 285.7	-0.5%
GB	7 284.3	7 089.7	7 189.7	7 127.1	-0.9%
GR	386.0	328.8	~	~	–
HR	198.0	192.9	195.2	190.7	-2.3%
HU [2]	175.3	329.2	336.8	332.7	-1.2%
IE	408.2	388.0	374.0	374.0	0.0%
IT	3 040.0	2 998.0	2 761.0	2 627.7	-4.8%
LT	17.2	19.1	20.7	20.9	1.0%
LV	22.4	22.2	22.3	16.8	-24.7%
MT	8.2	9.1	10.1	9.6	-5.0%
NL	857.2	855.9	864.5	885.5	2.4%
PL	518.2	499.0	412.9	458.0	10.9%
PT	308.7	318.1	259.0	234.0	-9.7%
RO	226.9	232.2	~	~	–
SE	772.6	790.2	821.6	814.3	-0.9%
SI	133.5	130.7	131.8	125.9	-4.5%
SK	102.1	114.5	97.5	100.5	3.1%
EUR28 *est.*	33 851.3	33 724.1	32 663.8	32 546.5	-0.4%

[1] In this table we have taken the EBU-M.I.S. concept of revenues, slightly different from the operating revenues. Some series were reviewed on the basis of data communicated by EBU-M.I.S.
[2] Discontinuity in 2011, following the merger of various companies within MTVA.



2009-2013 EUR million.

Average annual rate of growth of revenues 2009-2013



2009-2013 In %.

European Audiovisual Observatory

T.3.4 Public radio companies in Europe

2009-2013 Unconsolidated operating revenues (EUR million, current rate).

Company	Country	2009	2010	2011	2012	2013	2013/12
Radio France	FR	615.4	635	648.7	665.1	664.8	0.0%
BBC World Service	GB	336.5	346.7	333	323.7	298.3	-7.8%
Sveriges Radio AB	SE	221.9	269.2	284.7	286.9	280.2	-2.3%
Deutschlandradio	DE	210.4	208.2	202.2	221.6	207.5	-6.4%
Radio Romania	RO	94.9	93.5	95.2	98.3	96.5	-1.8%
Cesky Rozhlas	CZ	84.6	88	90.5	89.2	96	7.6%
Polskie Radio S.A.	PL	61.3	60.7	63.7	66.7	74.9	12.3%
Catalunya Radio	ES	52.5	49.7	47.4	36.4	~	~
Bulgarian National Radio	BG	28.2	25.5	26.4	23.0	22.7	-1.2%
Canal Sur Radio S.A.	ES	33.0	32.7	31.4	~	21.4	~
Eusko Irratia Radiodiffusion Vasca	BE	19.5	19.7	27.8	21.6	20.7	-4.0%
Latvijas Radio	LV	8.5	6.8	7.1	7.3	7.6	4.5%
Gasteiz Irratia Radio Vitoria S.A. [1]	ES	4.1	3.9	4.4	4.3	4.1	-4.7%
Radio Autonomica de Aragon S.A.	ES	0.6	0.3	0.2	0.3	4.1	1412.9%
Radio Autonomica de Castilla La Mancha S.A.	ES	2.0	2.4	2.5	3.5	3.2	-8.6%
Radio Autonomia Madrid S.A.	ES	0.4	1.1	1.0	0.9	0.5	-41.7%
Radio del Principado de Asturias	ES	0.1	0.2	0.1	0.1	0.1	20.0%
Radio Publica de Canarias S.A.	ES	0.1	0.1	0.1	~	0.1	~

[1] Acquired in December 2010 by Ente Público de Derecho Privado Euskal Irrati Telebista/Radiotelevisión Vasca.

➡ European Audiovisual Observatory

T.3.5 Radio-TV licence fee and revenues of public radio-television companies in the European Union by households and by inhabitants

2013-2014 In EUR.

Country	Radio-TV licence fee 2013	Radio-TV licence fee 2014	Revenues/households [1] 2013	Revenues/inhabitant [2] 2013
AT	193.92	193.92	274.2	119.4
BE [3]	100	100	167.9	69.6
BG	–	–	21.8	8.4
CY	–	–	103.4	35.7
CZ	TV: 62.2; radio: 20.7	TV: 62.2; radio: 20.7	83.1	35.3
DE	215.76	215.76	222.0	108.9
DK [4]	TV: 324.7; radio: 43	326.6	381.8	159.6
EE	–	–	53.9	23.6
ES	–	–	105.2	39.2
FI	–	–	183.9	86.9
FR	131	133	154.2	63.4
GB	179.44		292.8	113.1
GR	~	~	~	~
HR	47.2	48.3	115.6	43.4
HU	–	–	88.3	33.6
IE	160	160	219.6	81.3
IT	113.5	113.5	103.7	44.2
LT	–	–	15.8	7.0
LV	–	–	20.1	8.2
MT	–	–	65.7	23.0
NL	–	–	118.8	52.8
PL	TV: 47.3; radio:14.3	TV: 48.1; radio: 14.7	34.1	11.9
PT	27	31.8	58.2	22.2
RO	Radio: 6.7	Radio: 6.7	~	~
SE	–	–	177.2	85.9
SI	TV: 149.8; radio only: 44.29	TV: 153; radio only: 45.24	149.5	61.1
SK	55.68	55.68	55.5	18.6
EUR28 *est.*	~	~	~	~

[1] Total amount of revenues of public broadcasting organisations (public funding + commercial revenues + other revenues) / Number of households.
[2] Total amount of revenues of public broadcasting organisations (public funding + commercial revenues + other revenues) / Number of inhabitants.
[3] In the Walloon region only.
[4] Radio licence fee was abolished in 2014.

➡ European Audiovisual Observatory

T.3.6 Breakdown of revenues of public broadcasting organisations in the European Union 2013

Country	Channels	TV and/ or Radio	EUR million Public revenues	Commercial revenues	Other revenues	Total	% Public revenues	Commercial revenues	Other revenues
AT	ORF	R+TV	**615.7**	**392.4**	**0.0**	**1 008.1**	**61.1%**	**38.9%**	**0.0%**
BE	RTBF	R+TV	228.9	69.0	25.7	323.6	70.8%	21.3%	7.9%
	VRT	R+TV	294.4	143.6	10.9	448.9	65.6%	32.0%	2.4%
	BRF (2012)	R+TV	5.3	0.7	0.1	6.3	84.3%	11.2%	1.9%
	Total *prov.*		**528.6**	**213.3**	**36.7**	**778.8**	**67.9%**	**27.4%**	**4.7%**
BG	BNT	TV	35.9	2.4	0.0	38.2	93.8%	6.2%	0.0%
	BNR	R	21.7	1.0	0.0	22.7	95.7%	4.3%	0.1%
	Total		**57.6**	**3.3**	**0.0**	**61.0**	**94.5%**	**5.5%**	**0.0%**
CY	CyBC	R+TV	**27.2**	**3.6**	**0.1**	**30.8**	**88.1%**	**11.5%**	**0.4%**
CZ	CT	TV	247.6	19.4	9.1	276.0	89.7%	7.0%	3.3%
	CR	R	82.7	8.9	3.4	95.0	87.1%	9.4%	3.5%
	Total		**330.3**	**28.3**	**12.4**	**371.0**	**89.0%**	**7.6%**	**3.4%**
DE	ARD	TV+R	5 470.8	761.8	22.7	6 255.4	87.5%	12.2%	0.4%
	ZDF	TV	1 783.6	260.8	83.1	2 127.5	83.8%	12.3%	3.9%
	Deutsche Welle	TV+R	294.4	22.8	0.0	317.2	92.8%	7.2%	0.0%
	Deutschlandradio	R	195.4	12.0	2.2	209.6	93.2%	5.7%	1.1%
	Total	**TV+R**	**7 744.2**	**1 057.5**	**108.0**	**8 909.7**	**86.9%**	**11.9%**	**1.2%**
DK	DR	TV+R	497.7	53.7	9.6	560.9	88.7%	9.6%	1.7%
	TV2 (cons.)	TV	0.0	319.0	9.7	328.7	0.0%	97.1%	2.9%
	Total		**497.7**	**372.7**	**19.2**	**889.6**	**55.9%**	**41.9%**	**2.2%**
EE	ERR	TV+R	**28.8**	**1.6**	**0.1**	**30.5**	**94.6%**	**5.2%**	**0.2%**
ES	RTVE	TV+R	797.8	49.4	9.3	856.5	93.1%	5.8%	1.1%
	Autonomicas	TV+R	840.0	120.0	17.0	977.0	86.0%	12.3%	1.7%
	Total		**1 637.8**	**169.4**	**26.3**	**1 833.5**	**89.3%**	**9.2%**	**1.4%**
FI	YLE	TV+R	455.0	12.5	1.6	469.1	97.0%	2.7%	0.3%
FR	France Télévisions	TV	2 502.1	374.5	177.5	3 054.1	81.9%	12.3%	5.8%
	Arte France	TV	262.6	2.1	1.6	266.3	98.6%	0.8%	0.6%
	France Médias Monde	TV+R	165.8	12.4		178.2	93.0%	7.0%	0.0%
	Chaîne parlementaire AP	TV	17.4			17.4	100.0%		
	Chaîne parlementaire Sénat (2011)	TV	16.9			16.9	100.0%		
	Radio France	R	574.4	66.5		640.9	89.6%	10.4%	0.0%
	TV5 Monde (2012)	TV	92.8	11.4	12.1	116.3	79.8%	9.8%	10.4%
	Total *prov.*		**3 632.0**	**455.4**	**179.1**	**4 290.1**	**84.7%**	**10.6%**	**4.2%**
GB	BBC Group	TV+R	4 643.9	1 196.7	84.3	5 924.9	78.4%	20.2%	1.4%
	Channel 4 Group	TV		1 061.9		1 061.9		100.0%	0.0%
	S4C	TV	97.1	3.1		100.4	96.7%	3.1%	
	Services Sound and Vision Corporation (est.)	TV+R	39.9			39.9	100.0%		
	Total		**4 780.9**	**2 261.7**	**84.3**	**7 127.1**	**67.1%**	**31.7%**	**1.2%**
GR	NERIT	TV+R	~	~	~	~	~	~	~
HR	HRT	TV+R	**162.3**	**20.8**	**7.6**	**190.7**	**85.1%**	**10.9%**	**4.0%**

T.3.6 Breakdown of revenues of public broadcasting organisations in the European Union 2013

continued

Country	Channels	TV and/ or Radio	EUR million: Public revenues	EUR million: Commercial revenues	EUR million: Other revenues	EUR million: Total	%: Public revenues	%: Commercial revenues	%: Other revenues
HU	MTVA	TV+R	**256.3**	**21.0**	**55.4**	**332.7**	**77.0%**	**6.3%**	**16.6%**
IE	RTE	TV+R	180.9	156.3	0.0	337.3	53.6%	46.3%	0.0%
	TG4	TV	33.7	3.1	0.0	36.8	91.5%	8.4%	0.1%
	Total		**214.6**	**159.4**	**0.0**	**374.0**	**57.4%**	**42.6%**	**0.0%**
IT	RAI	TV+R	**1 737.1**	**935.6**		**2 627.7**	**66.1%**	**35.6%**	
LT	LRT	TV+R	**49.3**	**22.7**	**0.2**	**72.2**	**68.2%**	**31.4%**	**0.3%**
LU	Chaîne parlementaire (2010)	TV	**0.6**	**0.0**	**0.0**	**0.0**	**100.0%**		
LV	LTV	TV	8.9	2.5	0.0	11.4	78.0%	22.0%	0.0%
	LR	R	4.2	1.2	0.0	5.4	78.2%	21.8%	0.0%
	Total		**13.1**	**3.7**	**0.0**	**16.8**	**78.1%**	**21.9%**	**0.0%**
MT	PBS	TV+R	**3.2**	**6.4**	**0.0**	**9.6**	**33.5%**	**66.5%**	**0.0%**
NL	NPO	TV+R	586.0	219.6	28.4	834.0	70.3%	26.3%	3.4%
	RNW (2012)	TV+R	51.4		0.1	51.5	99.9%	0.0%	0.1%
	Total *prov.*		**637.4**	**219.6**	**28.4**	**885.5**	**72.0%**	**24.8%**	**3.2%**
PL	TVP	TV	88.5	262.4	32.2	383.1	23.1%	68.5%	8.4%
	PR	R	49.6	25.3	0.0	74.9	66.2%	33.8%	0.0%
	Total		**138.1**	**287.7**	**32.2**	**458.0**	**30.2%**	**62.8%**	**7.0%**
PT	RTP	TV+R	**194.2**	**39.7**	**0.1**	**234.0**	**83.0%**	**17.0%**	**0.0%**
RO	TVR (2011)	TV	119.1	15.2	2.7	137.0	86.9%	11.1%	2.0%
	SRR	R	93.3	1.9	1.2	96.5	96.7%	2.0%	1.3%
	Total *prov.*	**TV+R**	**212.4**	**17.1**	**4.0**	**233.5**	**91.0%**	**7.3%**	**1.7%**
SE	SVT	TV	456.6	20.0	18.3	494.9	92.3%	4.0%	3.7%
	SR	R	273.3	6.9	0.0	280.2	97.5%	2.5%	0.0%
	UR	TV+R	38.8	0.0	0.4	39.2	99.0%	0.0%	1.0%
	Total		**768.7**	**26.9**	**18.7**	**814.3**	**94.4%**	**3.3%**	**2.3%**
SI	RTVSLO	TV+R	**96.5**	**29.4**	**0.0**	**125.9**	**76.7%**	**23.3%**	**0.0%**
SK	RTS	TV+R	**95.4**	**5.0**	**0.2**	**100.5**	**94.9%**	**5.0%**	**0.1%**
EUR 28	**Total** (1)		**24 881.4**	**6 763.6**	**614.6**	**32 238.0**	**77.2%**	**21.0%**	**1.9%**

(1) Greece not included.

➡ European Audiovisual Observatory

T.3.7 Consolidated revenues of the main private European TV groups
2009-2013 EUR million.

Company/Group	Country	Activities	2009	2010	2011	2012	2013	*2013/12*
Liberty Global plc (1) (2)	GB	Distribution, OD AVMS, ISP, telephony	–	–	–	7 513	10 513	***39.9%***
p.m. Liberty Global Inc. (2)	US	Distribution, TV, OD AVMS, ISP, telephony	5 204	6 256	7 351	7 815	–	–
p.m. Virgin Media Inc.	US	Distribution, OD AVMS, ISP, telephony	2 543	2 899	3 085	3 108	–	–
British Sky Broadcasting Ltd (3)	GB	Distribution, TV, OD AVMS, ISP	6 630	7 581	8 073	8 505	8 665	***1.9%***
RTL Group	LU	TV, radio, OD AVMS, production	5 410	5 532	5 765	5 998	5 889	***-1.8%***
Vivendi (Groupe Canal Plus)	FR	Distribution, TV, OD AVMS, production	4 553	4 712	4 857	5 013	5 311	***5.9%***
Gruppo Mediaset	IT	TV, OD AVMS, production	3 883	4 293	4 250	3 721	3 415	***-8.2%***
Sky Italia (4)	IT	Distribution, TV, OD AVMS	2 661	2 876	2 873	2 897	2 922	***0.9%***
ITV plc	GB	TV, OD AVMS, production	2 281	2 200	2 466	2 559	2 853	***11.5%***
ProSiebenSat.1 Media AG (5)	DE	TV, radio, OD AVMS, production	2 798	3 012	2 756	2 969	2 605	***-12.2%***
continued operations	DE				2 199	2 356	2 605	***10.6%***
Groupe TF1 (6)	FR	TV, OD AVMS, production	2 365	2 622	2 620	2 621	2 470	***-5.7%***
continued operations						2 215	2 085	***-5.9%***
Kabel Deutschland	DE	Distribution, OD AVMS, ISP, telephony	1 473	1 577	1 700	1 830	1 900	***3.8%***
Grupo Corporativo ONO	ES	Distribution, TV, OD AVMS, ISP	1 512	1 472	1 485	1 573	1 598	***1.6%***
Modern Times Group	SE	TV, radio, OD AVMS, production	1 383	1 460	1 512	1 554	1 595	***2.6%***
continued operations (7)			1 205	1 460	1 512	1 554	1 595	***2.6%***
Ziggo N.V.	NL	Distribution, OD AVMS, ISP, telephony	1 284	1 376	1 478	1 537	1 565	***1.8%***
Sky Deutschland AG	DE	Distribution, TV, OD AVMS	902	977	1 139	1 333	1 547	***16.0%***
Prisa-Unitad Audiovisual	ES	Distribution, TV, OD AVMS	1 771	1 281	1 229	1 251	1 357	***8.5%***
Atresmedia	ES	TV, radio, OD AVMS, production	704	808	805	741	805	***8.6%***
Cyfrowy Polsat (8)	PL	Distribution, TV, internet, production	308	374	535	679	701	***3.2%***
continued operations					602	679	701	***3.2%***
Central European Media Enterprises	BM	TV, OD AVMS, production	473	551	668	585	502	***-14.2%***
TVN	PL	TV	584	629	443	387	374	***-3.4%***
Total			**48 724**	**52 487**	**55 090**	**56 675**	**56 586**	***-0.2%***
Total continued operations			**48 546**	**52 487**	**51 980**	**55 657**	**56 201**	***1.0%***
Mainly pay-TV groups (continued operations)			***28 843***	***31 380***	***33 871***	***35 541***	***36 078***	*1.5%*
Mainly free TV groups (continued operations)			***19 703***	***21 107***	***20 729***	***20 522***	***20 508***	*-0.1%*
US controlled			***20 779***	***23 762***	***25 808***	***26 863***	***26 048***	*-3.0%*

(1) Liberty Global plc was formed in 2013 after the takeover of Virgin Media plc by Liberty Global Inc. 2012 pro forma.
(2) Includes revenues outside Europe (around 10% of the consolidated revenues).
(3) Calendar year and not fiscal year.
(4) As at 30/06.
(5) Some Nordic and CEE activities were discontinued in 2013 but are still consolidated in 2012 statements.
(6) As for 2013 data are presented before implementation of norms IFRS. Turnover of Eurosport International (taken over by Discovery Communications in 2014) are still integrated.
(7) In 2010, Modern Times Group has deconsolidated its former retail subsidiary CDON.
(8) Financial results for 2012 include results of TV Polsat Group which were consolidated in 2011 since 20/04/2011. Continued operations for 2011 are calculated on a pro forma basis.

➥ European Audiovisual Observatory

T.3.8 Consolidated revenues of the main private European TV groups

2009-2013 In national currencies.

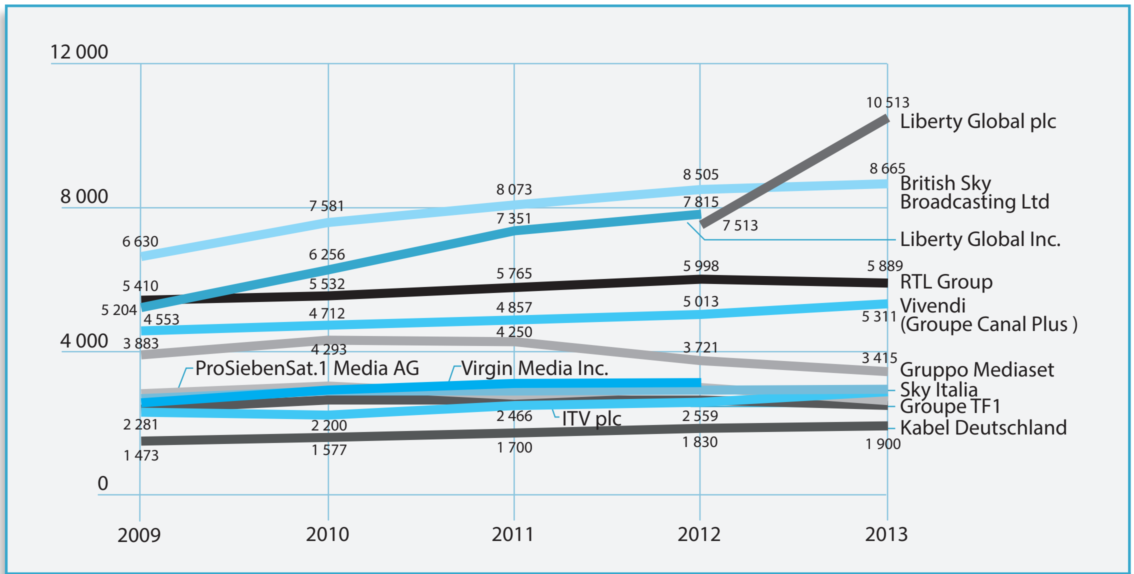
Company/Group	Country	Currency	2009	2010	2011	2012	2013	2013/12
Liberty Global plc [1] [2]	GB					9 931	14 474	45.8%
p.m. Liberty Global Inc. [2]	US	USD	7 497	8 364	9 511	10 311	–	–
*p.m.*Virgin Media Inc.	US	USD	3 804	3 876	3 992	4 101	–	–
British Sky Broadcasting Ltd [3]	GB	GBP	5 631	6 325	6 765	6 960	7 235	4.0%
ITV	GB	GBP	1 879	2 064	2 140	2 196	2 389	8.8%
Modern Times Group	SE	SEK	14 173	13 101	13 473	13 336	14 129	5.9%
continued operations [4]		SEK	12 427	13 101	13 473	13 336	14 129	5.9%
Cyfrowy Polsat [5]	PL	PLN	1 266	1 482	2 366	2 778	2 911	4.8%
continued operations		PLN			2 661	2 778	2 911	4.8%
Central European Media Enterprises	BM	USD	714	737	865	772	691	-10.5%

1. Liberty Global plc was formed in 2013 after the takeover of Virgin Media plc by Liberty Global Inc. 2012 pro forma.
2. Includes revenues outside Europe (around 10% of the consolidated revenues).
3. Calendar year and not fiscal year.
4. In 2010, Modern Times Group has deconsolidated its former retail subsidiary CDON.
5. Financial results for 2012 include results of TV Polsat Group which were consolidated in 2011 since 20/04/2011. Continued operations for 2011 are calculated on a pro forma basis.

➥ European Audiovisual Observatory

G.3.2 Consolidated revenues of the main private European TV groups

2009-2013 EUR million.



2009-2013 EUR million.

➥ European Audiovisual Observatory

Radio and television companies

Note on methodology

In order to provide rather early in the year data on the economic trends of the European TV market, the European Audiovisual Observatory has compiled the revenues of 19 of the leading private groups operating in Europe. Whilst not perfect, this methodology is the only way to obtain a rapid overview of the economic evolution of the European TV market in the previous year

The measurement of the growth of the TV sector raises various difficulties:

- Groups and companies' statements are the only solid source of information for the main kind of revenues of private groups: advertising, pay-TV revenues and transactional revenues (sales of programmes, merchandising, VoD) but breakdown of revenues by products are not always available. In particular satellite packagers do not provide breakdowns of their revenues between distribution and broadcasting activities.
- Various major companies, in particular leading public broadcasting companies and small companies publish their accounts rather late in the year. Therefore consolidated revenues of leading TV groups are the only rapidly available sources to assess recent market trends.
- Large TV groups publish consolidated accounts but are more and more restrictive in the publication of affiliate companies.

This methodology itself raises various issues and should not be considered as perfect:

- Due to the various take-overs or closures, it is not possible to provide data on constant structures over a five year period. Where possible, we provide data taking account of discontinuing operations, in order to calculate growth on a constant basis.
- Due to the absence of a common segmentation of the group revenues, we have adopted the principle of considering the consolidated revenues related to all activities, including activities which are not related to the audiovisual sector (this is in particular the case for distribution companies also acting as ISPs or as providers of telephony services) or which operate outside of Europe (e.g. Liberty Global inc. whose revenues include around 10% of revenues from non-European markets).
- The accounts of 3 companies (Liberty Global, Virgin Media and Central European Media Enter-

Entreprises de radio et télévision

Note méthodologique

Afin de fournir assez tôt dans l'année des données sur les tendances économiques du marché européen de la télévision, l'Observatoire européen de l'audiovisuel a compilé les recettes de 19 des plus grands groupes privés opérant en Europe. Bien qu'imparfaite, cette méthodologie est la seule façon d'obtenir un aperçu rapide de l'évolution économique du marché européen de la télévision au cours de l'année précédente.

La mesure de la croissance du secteur de la télévision pose plusieurs difficultés :

- Les déclarations des groupes et des entreprises sont la seule source d'information fiable pour le principal type de recettes des groupes privés : publicité, recettes de la télévision à péage et recettes transactionnelles (vente de programmes, marchandisage, VoD) mais la ventilation des recettes par produits n'est pas toujours disponible. Les ensembliers satellitaires, en particulier, ne communiquent pas la répartition de leurs recettes entre les activités de diffusion et de distribution.
- Diverses grandes entreprises, en particulier les grandes sociétés publiques de radiodiffusion et les petites entreprises, publient leurs comptes assez tard dans l'année. Par conséquent, les chiffres d'affaires consolidés des grands groupes de télévision sont les seules sources rapidement disponibles pour évaluer les tendances récentes du marché.
- Les grands groupes de télévision publient des comptes consolidés, mais sont de plus en plus restrictifs dans la publication des comptes des sociétés affiliées.

Cette méthodologie pose plusieurs problèmes et ne doit pas être considérée comme parfaite :

- En raison des différents rachats ou cessions, il n'est pas possible de fournir des données sur des structures constantes sur une période de cinq ans. Dans la mesure du possible, nous fournissons des données tenant compte des activités abandonnées, afin de calculer la croissance sur une base constante.
- Compte tenu de l'absence d'une segmentation commune des recettes des groupes, nous avons adopté pour principe de considérer les recettes consolidées comme concernant toutes les activités, y compris les activités qui ne sont pas liées au secteur audiovisuel (c'est en particulier

Rundfunk-unternehmen

Methodischer Hinweis

Um gleich zu Beginn des Jahres Daten zu wirtschaftlichen Trends am europäischen Fernsehmarkt vorlegen zu können, hat die Europäische Audiovisuelle Informationsstelle die Umsätze von 19 führenden, in Europa tätigen privaten Sendergruppen ermittelt. Diese Methodologie ist zwar nicht perfekt, doch ist dies die einzige Möglichkeit, schnell zu einem Überblick über die wirtschaftliche Entwicklung am europäischen Fernsehmarkt im zurückliegenden Jahr zu kommen.

Das Ermitteln des Wachstums im Fernsehsektor ist aus verschiedenen Gründen schwierig:

- Die Jahresabschlüsse der Sendergruppen und Unternehmen sind die einzige verlässliche Informationsquelle hinsichtlich der wichtigsten Erlösarten privater Gruppen: Werbeerlöse, Pay-TV-Erlöse und Erlöse aus Transaktionen (Verkauf von Programmen, Merchandising, VoD), aber Angaben zu den Erlösen auf Produktebene stehen nicht immer zur Verfügung. Insbesondere Anbieter von Satellitenpaketen differenzieren bei ihren Angaben nicht nach Vertriebserlösen und Erlösen im Zusammenhang mit Sendetätigkeiten.
- Verschiedene große Unternehmen, vor allem führende öffentlich-rechtliche Anbieter und kleine Sender, veröffentlichen ihre Jahresabschlüsse relativ spät im Jahr. Deshalb sind die konsolidierten Erlöse der führenden TV-Gruppen die einzigen schnell verfügbaren Quellen, um die jüngsten Marktentwicklungen zu bewerten.
- Große Sendergruppen legen konsolidierte Konzernabschlüsse vor, werden aber hinsichtlich der Offenlegung von Zahlen verbundener Unternehmen immer zurückhaltender.

Diese Methodologie ist im Hinblick auf bestimmte Aspekte nicht unproblematisch und sollte nicht als perfekt betrachtet werden:

- Aufgrund von Übernahmen bzw. Verkäufen ist es nicht möglich, über einen Zeitraum von fünf Jahren hinweg Daten bezogen auf gleichbleibende Unternehmensstrukturen vorzulegen. Soweit möglich sind in den angegebenen Daten Änderungen des Umfangs der Geschäftstätigkeit berücksichtigt, um das Wachstum ausgehend von einer konstanten Basis zu berechnen.
- Da es keine einheitliche Aufgliederung der Erlöse auf Gruppenebene gibt, wird hier grundsätzlich davon ausgegangen, dass sich die

prises) are not accessible in European currencies. Original data are provided in USD, necessitating a second conversion into EUR which may lead to some biases.

We have analysed a sample list of 19 companies composed of 10 groups mainly operating as pay-TV operators and 9 groups mainly financed by advertising.

- The activities of the pay-TV groups analysed include distribution of TV packages and provision of their own TV premium channels and on-demand audiovisual services (VoD and/or catch-up TV services). They may also include provision of their own TV channels financed by advertising and production activities. Cable groups have also earned revenues as ISPs and as providers of telephony services.
- The groups mainly financed by advertising operate free-to-air generalist channels but they have also diversified into the provision of pay or free thematic channels. They also provide on-demand audiovisual services (VoD and/or catch-up TV services) and are generally also involved in sizable production activities.

In 2013, the European television sector experienced weak growth

Calculated on the basis of the consolidated turnover, on a like-for-like basis, of these 19 groups, the growth of the European television sector may be estimated to have been significantly lower in 2013 (0.9%) than in 2012 (2.1%). Like the previous year, the growth of the pay-TV groups, although lower than the year before (1.3% compared with 3.9%) was stronger than that of the groups mainly financed by advertising, which were in slight recession (-0.1%), although that was less dramatic than the year before (-0.9%).

Significant slowdown in the growth of pay-TV groups

The pay-TV groups comprise the cable operators and satellite packagers (Sky in the United Kingdom, German and Italy, Vivendi in France and Poland, Prisa in Spain, Zon Multimedia in Portugal and Cyfrowy Polsat in Poland). These groups posted overall organic growth of 1.3% in 2013 (compared with 3.7% in 2012). Even in a period of recession, European households have not only maintained their subscriptions but also shown interest in new services (TV “on the go”, providing access everywhere on any device; transactional VoD services). However, growth is running out of steam and it is impossible to determine at this stage whether this is

le cas pour les entreprises de distribution opérant également comme FAI ou comme fournisseurs de services de téléphonie) ou qui opèrent en dehors de l’Europe (par exemple, Liberty Global Inc. dont le chiffre d’affaires comprend environ 10 % de recettes provenant de marchés non européens).

- Les comptes de 3 sociétés (Liberty Global, Virgin Media et Central European Media Enterprises) ne sont pas accessibles en devises européennes. Les données originales sont en USD, ce qui nécessite une seconde conversion en EUR pouvant entraîner des divergences.

Nous avons analysé une liste composée de 19 groupes : 10 groupes essentiellement des opérateurs de télévision à péage et 9 groupes principalement financés par la publicité.

- Les activités des groupes de télévision à péage incluent la distribution de bouquets de télévision et la fourniture de leurs propres chaînes thématiques ainsi que de services audiovisuels à la demande (services de VoD et/ou de télévision de rattrapage). Elles peuvent également inclure la fourniture de leurs propres chaînes de télévision financées par la publicité et des activités de production. Les groupes du câble ont également été actifs en tant que fournisseurs d’accès internet (FAI) et que fournisseurs de services de téléphonie.
- Les groupes essentiellement financés par la publicité gèrent des chaînes généralistes gratuites, mais ils sont aussi diversifiés dans la fourniture de chaînes thématiques payantes ou gratuites. Ils fournissent également des services audiovisuels à la demande (services de VoD et/ou de télévision de rattrapage) et sont généralement aussi largement impliqués dans des activités de production.

En 2013, le secteur de la télévision européenne a connu une croissance faible

Calculé sur le chiffre d’affaires consolidés, à périmètre constant de ces 19 groupes, on peut estimer que la croissance du secteur européen de la télévision a été nettement plus faible en 2013 (0,9 %) qu’en 2012 (2,1 %). Comme l’année précédente, la croissance des groupes de télévision à péage, bien que moins significative que l’année précédente (1,3 % contre 3,9 %) a été plus forte que celle des groupes essentiellement financés par la publicité. Ceux-ci ont connu une légère récession (-0,1 %), moins marquée que l’année précédente (-0,9 %).

konsolidierten Erlöse auf sämtliche Geschäftsbereiche beziehen, einschließlich der Tätigkeiten, die nicht mit dem audiovisuellen Sektor in Verbindung stehen (insbesondere Vertriebsgesellschaften, die auch als ISP oder als Anbieter von Telefondiensten fungieren) oder Tätigkeiten, die außerhalb Europas durchgeführt werden (Liberty Global inc. z.B. erwirtschaftet ca. 10 % des Umsatzes außerhalb Europas).

- Die Jahresabschlüsse von 3 Firmen (Liberty Global, Virgin Media, und Central European Media Enterprises) liegen nicht in europäischen Währungen vor. Die Originalzahlen liegen in USD vor, was eine Umrechnung in EUR notwendig macht und zu Verzerrungen führen kann.

Wir haben 19 ausgewählte Sendergruppen unter die Lupe genommen; zu der betrachteten Stichprobe gehören 10 Gruppen, im Wesentlichen Pay-TV-Anbieter, und 9 Gruppen, die sich hauptsächlich durch Werbung finanzieren.

- Zu den Aktivitäten der Pay-TV-Gruppen zählen der Vertrieb von TV-Paketen, ein Angebot an eigenen Fernseh-Premiumkanälen und audiovisuellen Diensten auf Abruf (VoD und/oder Catch-up-TV-Dienste). Dazu gehören zum Teil auch eigene, durch Werbung oder Produktionstätigkeit finanzierte Fernsehprogramme. Bei Gruppen von Kabelnetzbetreibern fallen auch Erlöse aus dem Geschäft als Internetdienstean-bieter (ISP) und Anbieter von Telefondiensten an.
- Die Gruppen, die sich im Wesentlichen durch Werbeerlöse finanzieren, bieten frei empfangbare Vollprogramme, haben aber auch ihr Angebot in Form von Pay-TV- oder frei empfangbaren Spartenkanälen erweitert. Darüber hinaus stellen diese Sender audiovisuelle Dienste (VoD und/oder Catch-up-TV) zur Verfügung und sind im Allgemeinen an großen Produktionsvorhaben beteiligt.

Schwaches Wachstum des europäischen Fernsehsektors im Jahr 2013

Anhand der konsolidierten Umsätze dieser 19 Mediengruppen (bei gleichbleibendem Geschäftsumfang) lässt sich schätzen, dass das Wachstum des europäischen Fernsehsektors 2013 mit 0,9 % deutlich schwächer ausgefallen ist als 2012 (2,1 %). Wie im vergangenen Jahr war das Wachstum der Pay-TV-Gruppen – obwohl weniger ausgeprägt als im vergangenen Jahr (1,3 % gegenüber 3,9 %) – stärker als das der Sendergruppen, die sich im Wesentlichen über Werbung finanzieren. Diese wiesen 2013 einen leichten Rückgang auf (-0,1 %), der jedoch weniger stark ausfiel als im Vorjahr (-0,9 %).

already an effect of "cord cutting" (the transfer of pay-TV subscriptions to OTT services such as Netflix). The consolidation of the pay-TV market is continuing. In 2013, Liberty Global Inc. took over Virgin Media plc and became Liberty Global plc, a company incorporated under British law. It has increased its share in the Belgian company Telenet and took control in January 2014 of Ziggo in the Netherlands. The satellite pay-TV market has also been strengthened in Poland with the launch of the NC+ platform, following an agreement between Canal+ Cyfrowy, TVN and ITI. 2012 was also the first year of the complete consolidation by Cyfrowy Polsat of Telewizja Polsat (a provider of free-to-air and special-interest channels). Furthermore, in August 2013, Telewizja Polsat took over the Polskie Media Group (which operates the channels TV4 and TV6).

Mixed results for the groups mainly financed by advertising

The groups mainly financed by advertising have registered mixed results, and the effect of this has been the stagnation of the aggregated turnover of the eight groups examined. The RTL Group and ProSiebenSat.1 Media AG enjoyed significant growth in 2012 (4% and 7.7% respectively). In 2013, the RTL Group's revenues dropped by 1.8%, which can be explained more by the drop in revenues of its FremantleMedia production/distribution subsidiary and by exchange rate movements than by the crisis on the advertising market. The revenues of the group's channels have risen on its two principal markets (Germany and the Netherlands). The turnover of the group's digital online activities has risen by 26%. In August 2013, the RTL Group and CBS Studios International set up the joint venture RTL CBS Asia Entertainment Network with the aim of launching the channels RTL CBS Entertainment and RTL CBS Extreme, which target South East Asia.

The ProSiebenSat.1 Media group continues to refocus on the German-speaking countries and to diversify in the direction of digital services. After disposing of its channels in Benelux, it completed the sale of channels in the Nordic countries in April 2013 and sold the Hungarian channels TV2, FEM 3, PRO4 and Super TV2 to the local management team in December. As a result of the sale of the Nordic channels, the group's turnover fell by 12.2% but actually rose by 10.6% on the basis of like-for-like activities. The Digital & Adjacent segment grew by 44.5%. In 2013, the share of total revenues other than those from traditional TV advertising increased from 24.3% to 29.5%.

The ITV plc group posted double-digit growth for the fourth year running. The

La croissance des groupes de télévision à péage en net ralentissement

Les groupes de télévision à péage comprennent les câblo-opérateurs et les ensembliers satellitaires (Sky au Royaume-Uni, en Allemagne et en Italie, Vivendi en France et en Pologne, Prisa en Espagne, Zon Multimédia au Portugal et Cyfrowy Polsat en Pologne). Ces groupes ont enregistré une croissance interne globale de 1,3 % en 2013 (contre 3,7 % en 2012). Même en période de récession, les ménages ont non seulement conservé leurs abonnements mais aussi manifesté leur intérêt pour de nouveaux services (formule « Go » donnant accès partout sur n'importe quel appareil ; services de VoD transactionnels). La croissance s'essouffle cependant, sans qu'il soit possible de déterminer à ce stade si c'est déjà un effet du « cord cutting » (transfert des abonnements de télévision à péage vers les services OTT tels que Netflix). La consolidation du marché de la télévision à péage continue. Liberty Global Inc. a acheté en 2013 la société Virgin Media plc et s'est transformée en société de droit britannique Liberty Global plc. Elle a augmenté sa part dans la société belge Telenet et a pris le contrôle en janvier 2014 de Ziggo aux Pays-Bas. Le marché de la télévision à péage par satellite s'était consolidé en Pologne avec le lancement de la plate-forme NC+, à la suite de l'accord conclu entre Canal+ Cyfrowy, TVN et iti. 2012 avait également été la première année de consolidation totale de Telewizja Polsat par Cyfrowy Polsat (entreprise éditrice de chaînes de télévision gratuites et de chaînes thématiques). Par ailleurs, Telewizja Polsat a acquis en août 2013 le groupe Polskie Media Group (qui détient les chaînes TV4 et TV6).

Résultats contrastés pour les groupes essentiellement financés par la publicité

Les groupes essentiellement financés par la publicité ont enregistré des résultats contrastés, résultant en une stagnation du chiffre d'affaires agrégé des 8 groupes considérés. Le RTL Group et ProSiebenSat.1 Media AG avaient connu en 2012 une croissance significative (respectivement 4 % et 7,7 %). En 2013, le RTL Group a vu son chiffre d'affaires baisser de 1,8 % qui s'explique plus par la baisse du chiffre d'affaires de la branche de production/distribution FreemantleMedia et l'évolution du cours des changes que par la crise du marché publicitaire. En effet, sur les deux principaux marchés, en Allemagne et aux Pays-Bas le chiffre d'affaires des chaînes du groupe a augmenté. Le chiffre d'affaires des activités numériques en ligne du groupe a quant à lui augmenté de 26 %. En août 2013, RTL Group et CBS Studios International ont formé

Deutliche Abschwächung beim Wachstum der Pay-TV-Gruppen

Zu den Pay-TV-Gruppen zählen Kabelfernseh- und Satellitenbetreiber (Sky im Vereinigten Königreich, in Deutschland und in Italien, Vivendi in Frankreich und Polen, Prisa in Spanien, Zon Multimédia in Portugal und Cyfrowy Polsat in Polen). Diese Gruppen haben 2013 ein internes Gesamtwachstum von 1,3 % erzielt (gegenüber 3,7 % 2012). Selbst in Zeiten der Rezession haben die Haushalte nicht nur nicht darauf verzichtet, ihre Abonnements zu kündigen, sie haben auch zunehmend Interesse an neuen Diensten gezeigt (die Formel „To go" mit der Möglichkeit, an jedem beliebigen Ort und über jedes beliebige Gerät Fernsehen zu empfangen; VoD-Transaktionsdienste). Allerdings verliert das Wachstum inzwischen an Dynamik, ohne dass man zu diesem Zeitpunkt feststellen könnte, ob es sich hier bereits um einen „Abnabelungseffekt" handelt (Übergang von Pay-TV-Abonnements zu OTT-TV-Anbietern wie Netflix). Auf dem Markt für Bezahlfernsehen hat sich der Konsolidierungsprozess auch im vergangenen Jahr fortgesetzt. So hat Liberty Global Inc. 2013 Virgin Media plc aufgekauft und ist nun eine Gesellschaft britischen Rechts, Liberty Global plc. Sie hat ihre Anteile an dem belgischen Unternehmen Telenet erhöht und im Januar 2014 die Kontrolle über Ziggo in den Niederlanden übernommen. In Polen war es bereits mit dem Start der Plattform NC+ zu einer Konsolidierung des Pay-TV-Satellitenmarktes gekommen, nach dem Abschluss des Partnerschaftsvertrags zwischen Canal+ Cyfrowy, TVN und iti. 2012 war auch das erste Jahr der vollständigen Konsolidierung von Telewizja Polsat, das von Cyfrowy Polsat (Betreiber von kostenlosen Fernsehsendern und von Themensendern) übernommen worden ist. Darüber hinaus hat Telewizja Polsat im August 2013 die Polskie Media Group übernommen (ihr gehören die Sender TV4 und TV6).

Gegensätzliche Ergebnisse für die überwiegend werbefinanzierten Sendergruppen

Die Gruppen der im Wesentlichen werbefinanzierten Sender weisen gegensätzliche Ergebnisse aus. Bei den acht untersuchten Sendergruppen lässt sich eine Stagnation der aggregierten Umsätze feststellen. Konnten die RTL Group und ProSiebenSat.1 Media AG 2012 noch ein erhebliches Wachstum aufweisen (4 % bzw. 7,7 %), so gingen die Umsätze der Sendergruppe RTL 2013 um 1,8 % zurück. Der Grund dürfte allerdings weniger in der Krise des Werbemarktes liegen als im Rückgang der Umsätze der RTL-Tochter FreemantleMedia (Produktions- und Vertriebssparte) und in der Entwicklung der Wechselkurse. In der Tat sind die Umsätze der Gruppe auf den beiden wichtigsten Märkten, Deutschland und den Niederlanden, gestiegen. Allein die Online-

11.5% increase in revenues can mainly be put down to the growth in revenues from production activities (ITV Studios) (+ 20%) and the Online, Pay & Interactive division (+ 16 %), while advertising revenues remained steady. The group is continuing its diversification and announced at the beginning of 2014 the launch of two new channels (ITVBe and ITV Encore), while ITV Studios is continuing with its acquisition policy.

On the other hand, the revenues of the French group TF1, which stagnated for two years, fell (on the basis of like-for-like activities) by 5.9%. The group has gradually disposed of Eurosport International, in which Discovery Communications acquired a 51% majority stake in January 2014.

A significant fall in the TV advertising market in Italy and Eastern Europe has continued to affect the revenues of Mediaset (-8.2% compared with -12.5% in 2012), CME (-14.2%) and TVN (-3.4%). The Time Warner group gradually increased its stake in CME from 31% in March 2009 to 49.9% in July 2012 and continued there a process of recapitalisation during the second quarter of 2013.

It should be noted that 7 of the 19 groups are completely or mainly under US control. In 2013, their revenues represented 46.3% of the overall revenues of the 19 groups of the sample (against 45.8% in 2012 and 44.7 % in 2011).

la *joint venture* RTL CBS Asia Entertainment Network en vue de lancer des chaînes vers l'Asie du Sud-Est: RTL CBS Entertainment et RTL CBS Extreme.

Le groupe ProSiebenSat.1 Media continue quant à lui son recentrage sur l'espace germanophone et sa diversification vers les services numériques. Après s'être débarrassé de ses chaînes au Benelux, il a finalisé en avril 2013 la vente des chaînes dans les pays nordiques et a vendu en décembre les chaînes hongroises TV2, FEM 3, PRO4 and Super TV2 à l'équipe des dirigeants locaux. En raison de la vente des chaînes nordiques, le chiffre d'affaires du groupe a baissé de 12,2 %, mais à périmètre égal d'activités, il a augmenté de 10,6 %. Les activités du segment Digital & Adjacent ont augmenté de 44,5 %. En 2013, la part dans le chiffre d'affaires total des revenus autres que ceux de la publicité TV traditionnelle est passé de 24,3 % à 29,5 %.

Le groupe ITV plc a enregistré pour la quatrième année consécutive une croissance à deux chiffres. La croissance de 11,5 % du chiffre d'affaires s'explique essentiellement par celle des revenus des activités de production (ITV Studios) (+ 20 %) et du segment Online, Pay & Interactive (+ 16 %), alors que les recettes publicitaires se sont maintenues. Le groupe continue sa diversification. Il a annoncé début 2014 le lancement de deux nouvelles chaînes à péage (ITVBe et ITV Encore) tandis que ITV Studios continue une politique d'acquisition.

En revanche, les recettes du groupe français TF1 qui avaient déjà connu deux ans de stagnation ont baissé (à périmètre d'activités constant) de 5,9 %. Le groupe a progressivement désinvesti d'Eurosport International, dans lequel Discovery Communications a pris une part majoritaire de 51 % en janvier 2014.

Une diminution importante du marché de la publicité télévisée en Italie et en Europe de l'Est a continué d'affecter les recettes de Mediaset (-8,2 % contre -12,5 % en 2012), de CME (-14,2 %) et de TVN (-3,4 %) Le groupe Time Warner a progressivement porté sa participation dans CME de 31% en mars 2009 à 49,9 % en juillet 2012, part maintenue lors d'une recapitalisation durant le second trimestre 2013.

Il convient de noter que 7 des 19 groupes sont totalement ou majoritairement sous contrôle américain. En 2013, leurs recettes ont représenté 46,3 % du total des recettes des 19 groupes de l'échantillon (contre 45,8 % en 2012 et 44,7 % en 2011).

Aktivitäten der Gruppe wiesen 2013 ein kräftiges Umsatzplus von 26 % auf. Im August 2013 haben die RTL Group und CBS Studios International ein *Joint venture* gebildet, RTL CBS Asia Entertainment Network, um in Zukunft ihre Aktivitäten nach Südostasien auszudehnen: RTL CBS Entertainment und RTL CBS Extreme.

Die Sendergruppe ProSiebenSat.1 Media setzt ihre Politik der Rückbesinnung auf den deutschsprachigen Raum und einer Diversifizierung mit Schwerpunkt auf Online-Angebote fort. Nach der Trennung von ihren Benelux-Sendern hat die Gruppe im April 2013 den Verkauf der Sender in Skandinavien abgeschlossen und im Dezember die ungarischen Sender TV2, FEM 3, PRO4 und Super TV2 an die lokalen Geschäftsführer der Sender verkauft. Durch den Verkauf der nordeuropäischen Sender sind die Umsätze der Gruppe zwar um 12,2 % zurückgegangen, bei gleichbleibendem Geschäftsumfang sind sie jedoch um 10,6 % gestiegen. Das Digitalsegment weist sogar ein Plus von 44,5 % auf. 2013 ist der Teil der Gesamtumsätze aus Einnahmen, die nicht aus der traditionellen Fernsehwerbung stammen, von 24,3 % auf 29,5 % gestiegen.

Die britische Sendergruppe ITV plc weist zum vierten Mal in Folge zweistellige Wachstumsraten auf. Das Umsatzwachstum von 11,5 % geht im Wesentlichen zurück auf das Wachstum der Einnahmen aus der Produktion (ITV Studios) (+ 20 %) und des Online-Segments, Pay & Interactive (+ 16 %), bei den Werbeeinnahmen gab es keine Veränderungen. Die Gruppe setzt ihre Diversifizierung fort. Anfang 2014 hat sie den Start von zwei neuen TV-Sendern angekündigt (ITVBe und ITV Encore), ITV Studios setzt seine Aquisitionspolitik fort.

Die Einnahmen der französischen Gruppe TF1, die bereits seit zwei Jahren stagnieren, sind dagegen weiter um 5,9 % zurückgegangen (bei gleichbleibendem Geschäftsumfang). Die Gruppe hat sich aus Eurosport International zurückgezogen, bei dem Discovery Communications im Januar 2014 die Mehrheit von 51 % übernommen hat.

Der starke Einbruch der Fernsehwerbeeinnahmen in Italien und in Osteuropa hat sich auch 2013 auf die Einnahmen von Mediaset (-8,2 % gegenüber -12,5 % 2012), von CME (-14,2 %) und TVN (-3,4 %) ausgewirkt. Die Time Warner-Gruppe hat ihre Beteiligung an CME von 31 % (März 2009) auf 49,9 % (Juli 2012) erhöht. Dieser Anteil konnte im Zuge der Kapitalerhöhung im zweiten Quartal 2013 aufrechterhalten werden.

Es sei hier darauf verwiesen, dass sich 7 der 19 Gruppen ganz oder teilweise in US-Besitz befinden. Deren Erlöse machten im Jahr 2013 46,3 % der Gesamterlöse der 19 Sendergruppen der Stichprobe aus (gegenüber 45,8 % im Jahr 2012 und 44,7 % im Jahr 2011).

➥ European Audiovisual Observatory

T.3.9 The 40 leading European private television companies financed by advertising

2009-2013 Unconsolidated operating revenues (EUR million, current rate).

Rank	Company	Country	2009	2010	2011	2012	2013	2013/12
1	ProSiebenSat.1 Media AG (cons.) ❶	DE	2 795.5	3 012.2	2 971.2	2 396.6	2 630.7	9.8%
p.m.	Sat.1 Satellitenfernsehen GmbH	DE	740.1	~	~	~	~	~
p.m.	ProSieben Television GmbH	DE	687.1	~	~	~	~	~
p.m.	Kabel 1 Fernsehen	DE	289.2	303.9	~	~	~	~
2	Reti Televisive Italiane R.T.I. (R.T.I.)	IT	2 707.5	2 936.5	2 764.5	2 332.7	2 149.7	-7.8%
3	RTL Television GmbH	DE	1 415.9	1 562.2	1 554.5	1 615.0	1 663.4	3.0%
4	ITV Broadcasting Ltd	GB	1 227.0	1 470.5	1 468.2	1 729.7	1 549.4	-10.4%
5	TF1	FR	1 587.0	1 660.0	1 626.0	1 525.4	1 424.0	-6.6%
6	Métropole Télévision (M6)	FR	730.0	809.0	809.0	784.0	789.0	0.6%
7	CLT-UFA S.A. ❷	LU	602.8	680.4	748.3	725.9	~	~
p.m.	RTL Nederland B.V. ❷	NL	228.9	267.1	289.7	289.3	~	~
p.m.	RTL Belgium ❸	BE	140.4	161.8	173.0	164.4	88.1	-46.4%
8	ITV Network Ltd	GB	966.0	1 053.6	1 097.8	1 001.7	692.5	-30.9%
9	Atresmedia Corporación de Medios de Comunicación S.A.	ES	604.4	657.3	633.5	592.3	678.1	14.5%
p.m.	Gestora de Inversiones Audiovisuales La Sexta S.A. ❸	ES	178.9	270.5	213.7	178.1	–	–
10	Mediaset España Comunicación S.A. ❹	ES	535.6	692.3	859.6	715.8	658.2	-8.0%
p.m.	Sociedad General de Televisión Cuatro S.A. ❹	ES	–	359.0	–	–	–	–
p.m.	Sogecable (Cuatro) ❹	ES	286.6	–	–	–	–	–
11	Viasat Broadcasting UK Ltd	GB	409.9	580.4	636.0	622.6	629.1	1.0%
12	Vox Television GmbH	DE	439.9	514.7	523.4	554.5	553.8	-0.1%
13	Telekompaniya NTV	RU	272.4	397.7	488.5	552.4	512.9	-7.2%
14	TV4 AB	SE	240.4	324.2	397.6	449.9	485.8	8.0%
15	TV2 AS	NO	255.7	306.0	365.7	439.6	391.9	-10.9%
16	Channel 5 Broadcasting Ltd	GB	305.9	339.5	425.7	389.5	~	~
17	TVN SA.	PL	418.7	421.2	858.7	352.9	357.3	1.2%
18	CET 21 (Nova TV)	CZ	441.9	379.8	377.3	348.5	~	~
19	Red Bull Media House *est.*	AT	–	3.9	133.2	280.4	346.7	23.6%
20	Sanoma Media Finland ❺	FI	337.1	365.6	372.0	355.6	346.1	-2.7%
21	CTC Network	RU	273.8	335.6	348.3	384.5	345.6	-10.1%
22	RTL 2 Fernsehen GmbH	DE	265.0	282.9	295.8	292.0	313.7	7.4%
23	Vlaams Media Maatschappij (VTM)	BE	275.8	303.9	320.1	311.3	311.8	0.2%
24	MTV Oy	FI	182.7	214.0	229.3	273.1	243.7	-10.8%
25	Telewizja Polsat	PL	214.3	235.7	220.9	233.0	223.0	-4.3%
26	SBS Broadcasting B.V.	NL	196.6	198.3	~	~	~	~
27	Sociedade independente de communicaçao (SIC)	PT	151.1	170.3	159.9	156.0	169.4	8.6%
28	SBS Discovery TV AB	SE	103.3	129.3	136.0	152.9	161.5	5.6%
29	Aksept (Ren TV)	RU	86.5	118.4	140.3	163.9	158.5	-3.3%
30	Antenna Group (cons.)	GR	134.7	137.8	139.9	~	~	~
31	SBS Discovery Media APS	DK	84.0	97.0	114.3	124.3	129.9	4.5%
32	TV and Radio Company Petersbourg	RU	36.1	90.8	78.7	96.1	124.3	29.3%
33	La 7 s.r.l.	IT				44.0	117.7	–
p.m.	Telecom Italia Media	IT	115.8	118.9	163.4	83.8	–	–
34	Pro TV S.A.	RO	126.5	119.0	115.3	107.7	111.0	3.1%
35	FTV Prima	CZ	72.4	81.6	93.1	103.9	105.8	1.8%
36	SBS Belgium	BE	80.1	90.0	31.2	175.5	103.2	-41.2%
37	STV Central	GB	67.1	80.1	78.2	80.5	91.1	13.2%
38	TVI - Televisão Independente	PT	155.7	135.0	121.6	94.5	86.5	-8.5%
39	Magyar RTL Televizio	HU	115.4	105.5	98.0	90.0	81.9	-9.0%
40	ITV Breakfast	GB	76.8	83.3	67.4	80.9	80.9	0.0%

❶ ProSiebenSat1. Media AG no longer publishes the financial statements of its German subsidiaries.

❷ Since 2005, the broadcasting activities of the channels RTL4, RTL5 and RTL7 targeting the Netherlands and of the channels RTL-TVi, RTL Club and Plug targeting the French Community of Belgium have been under the responsibility of CLT-UFA S.A., a company of the RTL Group that consolidates various activities. RTL Nederland B.V. and RTL Belgium are providing some of the activities related to the channels as well as radio services.

❸ Dissolved since 31/10/2012 and merged with Antena 3, then rebranded Atresmedia.

❹ Cuatro was merged with Gestevisión Telecinco. Gestevisión Telecinco was then rebranded Mediaset España Comunicación.

❺ Includes press publishing activities.

➡ European Audiovisual Observatory

T.3.10 Operating revenues of the TV companies mainly financed by advertising and providing mainly generalist TV channels in the European Union

2009-2013

EUR thousand by country of establishment.
Figures in italics are estimated.
Operating revenues may include other revenues than advertising.

Country	Company	2009	2010	2011	2012	2013	*2013/12*
AT	Red Bull Media House GmbH *est.*		3 909	133 248	280 365	280 365	***0%***
	p.m. Servus TV GmbH *est.*			*63 400*	–	–	–
	ATV Privat TV GmbH & Co Kg *est.*	24 591	33 419	36 130	35 895	35 774	***-0.3%***
	Puls 4 TV GmbH & Co Kg		18 911	25 973	30 934	35 370	***14.3%***
	Sat.1 Privatrundfunk- und Programmgesellschaft m.b.H.	26 128	29 675	33 245	29 603	30 653	***3.5%***
	ProSieben Austria GmbH	~	~	~	~	~	~
	TOTAL *est.*	**50 719**	**85 914**	**291 997**	**376 796**	**448 497**	***19.0%***
BE	Vlaamse Media Maatschappij	275 814	303 942	320 143	311 323	311 770	***0.1%***
	SBS Belgium	80 060	89 979	31 170	175 516	103 212	***-41.2%***
	RTL Belgium	140 365	161 836	173 022	164 376	88 126	***-46.4%***
	Total	**496 238**	**555 756**	**524 335**	**651 215**	**503 108**	***-22.7%***
BG	Balkan News Corporation EAD (BTV Media Group)	64 471	57 764	64 173	63 281	66 826	***5.6%***
	Nova Television EAD	32 377	37 958	38 874	41 018	51 917	***26.6%***
	TV 7 EAD	7 633	4 169	5 389	5 960	8 368	***40.4%***
	M Sat TV OOD	837	932	1 474	2 922	4 019	***37.6%***
	PRO BG Media EOOD	4 162	6 601	5 624	4 087	3 066	***-25.0%***
	Televizia MM OOD	398	397				
	Total	**109 877**	**107 820**	**115 535**	**117 269**	**134 196**	***14.4%***
CY	Sigma Radio T.V. Public Limited	*13 834*	13 834	13 793	*12 000*	*11 000*	***-8.3%***
	Antenna LTD	*12 000*	*12 000*	*12 000*	*11 000*	*10 000*	***-9.1%***
	Teletypos Cyprus Ltd	*12 000*	*12 000*	*12 000*	*11 000*	*10 000*	***-9.1%***
	Total	**37 834**	**37 834**	**37 793**	**34 000**	**31 000**	***-8.8%***
CZ	CET 21. S.R.O.	379 839	379 839	377 331	348 505	~	~
	FTV Prima. S.R.O.	72 395	81 631	93 060	103 867	105 800	***1.9%***
	TOTAL *est.*	**452 234**	**461 470**	**470 391**	**452 372**	**454 305**	***0.4%***
DE	ProSiebenSat.1. Media AG *(estimates of German revenues)*	1 807 320	1 590 120	1 658 720	2 066 387	2 271 822	***9.9%***
	RTL Television GmbH	1 415 940	1 562 155	1 554 456	1 615 047	1 663 356	***3.0%***
	VOX Television GmbH	439 881	514 687	523 265	554 529	553 848	***-0.1%***
	RTL 2 Fernsehen GmbH & Co. KG	264 985	282 906	295 831	291 998	313 735	***7.4%***
	Total	**3 928 127**	**3 949 868**	**4 032 272**	**4 527 961**	**4 802 761**	***6.1%***
DK	SBS Discovery Media APS	83 997	96 986	114 286	124 348	129 896	***4.5%***
	TV 3 A/S	13 162	14 127	14 654	15 011	16 733	***11.5%***
	Bravad Production / DK4 APS	~	~	~	~	~	~
	Total	**97 160**	**111 113**	**128 940**	**139 359**	**146 629**	***5.2%***
EE	TV3 AS	8 904	9 400	10 197	10 279	11 780	***14.6%***
	Kanal 2 AS	9 883	9 119	10 008	9 991	10 649	***6.6%***
	Videomeedia OU			268	257	~	~
	Total	**18 787**	**18 519**	**20 473**	**20 527**	**22 429**	***9.3%***
ES	Atresmedia Corporación de Medios de Comunicación SA	604 350	657 279	633 453	592 303	678 109	***14.5%***
	Mediaset España Comunicación SA	535 643	692 320	859 631	715 807	658 249	***-8.0%***
	Prisa (Television in abierto)	427 900	379 620	–	–	–	–
	Gestora de Inversiones Audiovisuales La Sexta SA	178 921	270 480	213 687	178 073	–	–
	Total	**1 746 815**	**1 999 699**	**1 706 771**	**1 486 183**	**1 336 358**	***-10.1%***

T.3.10 Operating revenues of the TV companies mainly financed by advertising and providing mainly generalist TV channels in the European Union

continued

2009-2013

EUR thousand by country of establishment.
Figures in italics are estimated.
Operating revenues may include other revenues than advertising.

Country	Company	2009	2010	2011	2012	2013	*2013/12*
FI	MTV Oy	192 722	213 999	229 305	273 088	243 722	*-10.8%*
	Sanoma Media Finland 1	337 110	365 619	372 023	355 566	346 118	*-2.7%*
	Total	**529 832**	**579 618**	**601 328**	**628 654**	**589 840**	*-6.2%*
FR	Télévision Française 1 (TF1)	1 587 000	1 660 000	1 626 000	1 525 400	1 424 000	*-6.6%*
	Métropole Télévision	730 000	809 000	809 000	784 000	789 000	*0.6%*
	D8	29 867	47 201	56 088	*70 000*	168 709	*141.0%*
	Total	**2 346 867**	**2 516 201**	**2 491 088**	**2 379 400**	**2 451 709**	*3.0%*
GB	ITV Broadcasting Limited	1 226 992	1 473 897	1 491 669	1 729 710	1 549 439	*-10.4%*
	ITV Network Limited	1 000 457	1 096 701	1 097 796	1 001 718	692 515	*-30.9%*
	Viasat Broadcasting UK Limited	409 879	579 858	636 000	622 646	629 142	*1.0%*
	Channel 5 Broadcasting Limited	305 859	339 169	425 742	389 501	~	~
	STV Central Limited	67 062	80 047	78 165	80 547	91 083	*13.1%*
	ITV Breakfast Broadcasting LTD	–	–	–	29 903	80 888	*170.5%*
	ITV Breakfast LTD	76 770	83 318	67 384	39 968	40 821	*2.1%*
	UTV Limited	38 652	44 072	45 640	41 994	40 693	*-3.1%*
	STV North Limited	21 372	26 248	25 477	26 222	29 085	*10.9%*
	SBS Discovery Media UK Limited	23 241	26 303	28 563	25 726	25 891	*0.6%*
	Channel Television Holdings Limited	*8 373*	*9 950*	*10157*	*10 166*	~	~
	Total	**3 178 657**	**3 759 564**	**3 906 593**	**3 998 101**	**3 579 224**	*-10.5%*
GR	Antenna Group S.A. (cons.)	134 699	137 817	139 884	~	~	~
	Teletypos S.A.	139 180	112 088	98 471	84 849	77 814	*-8.3%*
	Alpha Satellite Television S.A.	79 439	70 371	51 897	44 821	48 735	*8.7%*
	New Television S.A.	76 970	53 528	52 952	45 122	44 610	*-1.1%*
	Eidiseis Dot Com S.A.	49 606	31 147	28 153	24 592	~	~
	Ikaros Radio TV Enterprises S.A.	3 515	3 430	3 009	2 453	2 519	*2.7%*
	Total	**483 409**	**408 380**	**374 365**	**366 314**	**338 154**	*-7.7%*
HR	Nova TV D.D.	37 767	46 060	45 164	44 808	45 304	*1.1%*
	RTL Hrvatska D.O.O.	41 117	37 500	37 441	31 156	34 492	*10.7%*
	Total	**78 884**	**83 559**	**82 604**	**75 963**	**79 796**	*5.0%*
HU	Magyar RTL Televízió RT.	115 440	105 446	97 955	89 957	81 909	*-8.9%*
	MTM-SBS Televízió ZRT. (TV2)	80 810	69 518	55 034	51 483	~	~
	Viasat Hungária Mûsorszolgáltató RT.	24 017	23 327	26908	25020	23 621	*-5.6%*
	TOTAL *est.*	**220 267**	**198 291**	**179 896**	**166 460**	**157 013**	*-5.7%*
IE	TV3 Television Network Limited	51 781	53 410	54 428	52 824	~	~
	Total	**51 781**	**53 410**	**54 428**	**52 824**	~	~
IT	RETI Televisive Italiane S.P.A. (R.T.I.)	2 707 486	2 936 481	2 764 529	2 332 733	2 149 682	*-7.8%*
	La 7 s.r.l.				44 036	117 684	–
	Telecom Italia Media SPA	115 844	118 870	163 380	83 840	–	–
	Total	**2 823 330**	**3 055 351**	**2 927 909**	**2 460 609**	**2 267 366**	~
LT	UAB Tele - 3	19 572	20 864	22 352	24 721	24 557	*-0.7%*
	UAB Laisvas Ir Nepriklausomas Kanalas	17 541	17 473	18 300	18 253	18 429	*1.0%*
	UAB Baltijos TV	2 712	3 104	1 774	2 472	1 878	*-24.0%*
	Total	**39 825**	**41 441**	**42 426**	**45 446**	**44 864**	*-1.3%*
LU	CLT-UFA SA	602 796	680 411	748 324	725 866	~	~
	Osmose Media SA	29 576	61 663	62 174	~	~	~
	Total	**632 372**	**742 074**	**810 498**	**725 866**	~	~

T.3.10

continued

Operating revenues of the TV companies mainly financed by advertising and providing mainly generalist TV channels in the European Union

2009-2013 EUR thousand by country of establishment.
Figures in italics are estimated.
Operating revenues may include other revenues than advertising.

Country	Company	2009	2010	2011	2012	2013	*2013/12*
LV	TV 3 Latvia SIA	12 153	12 286	14 763	18 352	18 622	***1.5%***
	Latvijas Neatkariga Televizija AS	11 568	11 224	10 822	10 085	8 345	***-17.3%***
	Total	**23 722**	**23 510**	**25 585**	**28 438**	**26 967**	***-5.2%***
NL	RTL Nederland B.V.	228 889	267 066	289 744	289 284	~	~
	SBS Nederalnd *est.*	*358 000*	316 000	*316 000*	*316 000*	~	~
	Total	**586 889**	**583 066**	**605 744**	**605 284**	~	~
PL	TVN S.A.	418 731	420 983	858 716	352 885	357 263	***1.2%***
	Telewizja Polsat SP. Z O.O.	214 344	235 584	220 887	232 979	222 999	***-4.3%***
	Polskie Media S.A.	18 823	17 149	16 224	18 917	~	~
	Telewizja Puls SP. Z O.O.	5 594	9 572	13 470	15 550	~	~
	TOTAL *est.*	**657 492**	**683 288**	**1 109 297**	**620 331**	**614 729**	***-0.9%***
PT	Sociedade Independente De Comunicaçao. S.A. (SIC)	151 108	170 299	159 920	155 954	169 382	***8.6%***
	TVI-Televisao Independente. S.A.	155 695	135 035	121 598	94 505	86 526	***-8.4%***
	Total	**306 803**	**305 335**	**281 518**	**250 459**	**255 908**	***2.2%***
RO	PRO TV SA	126 482	118 938	115 268	107 738	110 956	***3.0%***
	Antena TV Group SA	54 297	51 843	54 392	52 239	60 073	***15.0%***
	Prima Broadcasting Group SRL	27 251	23 465	21 671	16 797	16 828	***0.2%***
	Antena 3 SA	13 127	10 430	12 858	15 480	15 971	***3.2%***
	Sonic Media SRL	28	24	811	1 027	451	***-56.1%***
	Total	**221 185**	**204 700**	**205 001**	**193 281**	**204 279**	***5.7%***
SE	TV4 AB	240 435	323 973	397 610	449 875	485 824	***8.0%***
	SBS Discovery TV AB	103 326	129 275	136 043	152 883	161 499	***5.6%***
	Total	**343 761**	**453 248**	**533 653**	**602 758**	**647 323**	***7.4%***
SI	Produkcija Plus	49 472	53 692	56243	54 244	49 936	***-7.9%***
	Total	**49 472**	**53 692**	**56 243**	**54 244**	**49 936**	***-7.9%***
SK	Markiza - Slovakia. SPOL. S R.O.	77 972	71 126	74 312	70 438	62 030	***-11.9%***
	Mac TV. S.R.O.	22 238	18 951	21 684	20 616	22 860	***10.9%***
	Total	**100 210**	**90 077**	**95 996**	**91 054**	**84 890**	***-6.8%***
EU	**Total EU** *est.*	**19 612 548**	**21 162 800**	**21 712 679**	**21 151 166**	**20 655 512**	***-2.3%***

1 Includes press activities.

➥ European Audiovisual Observatory

1 2 3 4 5 6 7 8

T.3.11 The 40 leading European thematic television companies 2010-2013

Unconsolidated operating revenues (EUR million). Include also companies providing film pay-TV premium services and "mini-generalist channels".

Rank	Company	Country	Channels	2010	2011	2012	2013	*2013/12*
1	Société d'édition Canal Plus	**FR**	Canal+, Canal+ channels, Foot+, Rugby+, etc.	1 787.0	2 024.0	2 036.0	2 051.0	***0.7%***
2	Discovery Communications Europe	**GB**	Discovery Channels	424.7	451.5	479.3	522.2	***9.0%***
3	Eurosport *est.*	**FR**	Eurosport	360.8	369.9	399.7	430.0	***7.6%***
4	ITV2 Ltd	**GB**	ITV2	261.2	292.9	303.8	336.7	***10.8%***
5	Satellite Information Services (Holdings) Ltd	**GB**	Racing UK	288.5	287.1	307.9	~	***~***
6	Turner Broadcasting System Europe	**GB**	CNN International	238.8	285.5	317.4	291.4	***-8.2%***
7	C More Entertainment	**SE**	Canal+ channels	277.8	245.6	270.7	258.3	***-4.6%***
8	Super RTL Disney Fernsehen	**DE**	Super RTL	172.3	176.8	175.4	~	***~***
9	SBS Discovery AS	**NO**	TV Norge	96.3	132.1	163.9	166.9	***1.8%***
10	Fox International Channels Italy	**IT**	Fox Italia, Fox Crime,...	184.7	177.7	175.4	163.9	***-6.6%***
11	ESPN (Europe, Middle east, Africa) Ltd	**GB**	ESPN	178.4	174.1	196.1	150.2	***-23.4%***
12	Discovery Italia	**IT**	Discovery Italia, Real Time, D-Max	9.9	46.3	74.3	143.6	***93.3%***
13	EDI-TV	**FR**	W9, M6 Music	108.9	122.0	129.1	~	***~***
14	ITV Digital Channels	**GB**	ITV3, ITV4, The Zone, CITV	33.6	108.7	111.1	125.2	***12.7%***
15	NGC Europe	**GB**	National Geographic	–	532.2	112.9	121.2	***7.4%***
16	Sport TV Portugal S.A.	**PT**	Sport TV	158.3	147.9	138.1	120.3	***-12.9%***
17	Gol Televisión	**ES**	Gol TV	154.2	160.8	116.4	~	***~***
18	MTV Networks B.V.	**NL**	MTV Nederland, Comedy Central, TMF,…	60.7	62.0	78.2	103.5	***32.4%***
19	DSF Deutsches Sportfernsehen	**DE**	Sport 1	86.9	93.3	97.0	~	***~***
20	Orange Sports	**FR**	Orange Sports	121.9	161.4	91.5	~	***~***
21	BETV	**BE**	BETV	81.9	91.4	92.3	91.2	***-1.2%***
22	Nickelodeon UK	**GB**	Nickelodeon	43.4	74.6	88.4	87.9	***-0.6%***
23	UK Channel Management	**GB**	Alibi, Eden …	77.0	83.9	87.1	86.3	***-0.9%***
24	HBO Ceska Republika	**CZ**	HBO, HBO Comedy, Cinemax,...	78.5	75.6	89.4	83.5	***-6.6%***
25	Amalgamated Racing Limited	**GB**	Turf TV	66.0	64.1	70.6	83.3	***18.1%***
26	Fox International Channels España	**ES**	Fox España	56.0	82.6	83.3		***-1.0%***
27	Novivny Kanal	**RU**	Domashny	58.1	65.7	75.4	76.3	***1.2%***
28	VIMN Germany GmbH	**DE**	MTV Germany	~	76.2	76.2	~	***~***
29	Sparrowhawk International Channels	**GB**	Hallmark, Universal, Diva	67.1	80.2	74.5	~	***~***
30	N24 Gesellschaft für Nachrichten und Zeitgeschehen mbH	**DE**	N24	~	65.1	67.3	~	***~***
31	Eurosport France	**FR**	Eurosport France	66.8	66.8	69.7	66.3	***-4.9%***
32	NRJ 12	**FR**	NRJ 12	57.5	64.3	86.7	65.2	***-24.8%***
33	AB Thématiques	**FR**	AB1, AB Moteurs, Action,…	63.3	63.4	65.0	64.5	***-0.8%***
34	BFM TV	**FR**	BFM TV, BFM Business	31.9	42.6	58.1	64.1	***10.3%***
35	HBO Polska	**PL**	HBO Polska	49.6	52.3	62.8	61.9	***-1.4%***
36	n-tv Nachrichtenfernsehen GmbH	**DE**	n-tv	53.8	62.6	62.4	~	***~***
37	TV1000 AB	**SE**	TV1000 channels	78.3	74.8	69.2	60.4	***-12.7%***
38	Al Jazeera International	**GB**	Al Jazeera	23.3	35.5	35.8	57.9	***62.0%***
39	Comedy Club Production	**RU**	Comedy Club TV	39.9	~	66.4	57.7	***-0.1%***
40	NT1	**FR**	NT1	38.4	52.7	58.2	56.5	***-2.9%***

Companies not publishing complete accounts: Multithématiques (FR), Soc. d'exploitation d'un service d'information (I>Tele, FR), BEIN Sports (FR).

➡ European Audiovisual Observatory

T.3.12 Operating revenues of companies providing thematic television channels (by country of establishment)

2009-2013 EUR thousand.

Public owned companies and distribution companies (such as cable companies, IPTV companies and satellite packagers) also providing thematic TV channels are not included. Local affiliate companies of pan-European companies have been excluded. This explains most of the differences with the last edition.

Country	2009	2010	2011	2012	2013	2013/12
AT	~	~	~	~	~	~
BE	220 497	222 678	222 998	195 191	182 973	*-6.3%*
BG	23 042	36 478	36 199	44 398	52 437	*18.1%*
CY *est.*	28 000	28 000	28 000	28 000	28 000	–
CZ	103 137	147 661	159 106	173 029	182 943	*5.7%*
DE *est.*	659 764	601 998	640 562	632 514	630 584	*-0.3%*
DK *est.*	154 003	137 838	82 107	73 065	75 264	*3.0%*
EE *est.*	1 342	3 048	1 710	1 861	2 389	*28.4%*
ES *est.*	326 202	486 364	517 628	457 340	444 613	*-2.8%*
FI	2 472	9 451	19 705	33 215	38 889	*17.1%*
FR (1)	3 053 634	3 276 036	3 681 842	3 760 615	3 678 338	*-2.2%*
GB	2 716 558	2 854 498	3 406 158	3 114 380	3 205 135	*2.9%*
GR	4 249	3 355	6 954	5 982	5 831	*-2.5%*
HR	38 490	37 548	41 208	44 995	48 296	*7.3%*
HU	148 694	167 881	191 070	214 483	271 189	*26.4%*
IE	2 505	6 371	5 001	6 663	8 138	*22.1%*
IT	779 172	802 789	789 999	769 392	817 480	*6.3%*
LT	4 277	3 472	2 723	4 363	2 456	*-43.7%*
LU	45 598	47 936	45 261	60 223	56 866	*-5.6%*
LV	4 081	2 633	2 020	3 338	3 365	*0.8%*
NL	176 968	139 414	171 478	153 121	178 675	*16.7%*
PL	122 189	140 509	139 460	167 290	153 923	*-8.0%*
PT	203 849	295 557	225 844	206 873	170 632	*-17.5%*
RO	100 035	97 008	81 147	74 140	77 092	*4.0%*
SE	403 004	467 053	448 955	461 192	480 712	*4.2%*
SI	10 516	20 825	37 658	37 352	26 593	*-28.8%*
SK	8 966	10 987	11 308	10 481	12 323	*17.6%*
EUR 28	**9 341 243**	**10 047 385**	**10 996 101**	**10 733 495**	**10 835 136**	*0.9%*
Growth	*4.5%*	*7.6%*	*9.4%*	*-2.4%*	*0.9%*	

(1) Includes Société d'édition Canal Plus (broadcasting the Canal Plus channels) but not the affiliates of the Vivendi / Canal Plus Group providing thematic channels as their financial statements are not accessible.

➡ European Audiovisual Observatory from data provided by the AMADEUS database

T.3.13 Operating revenues of home shopping companies in Europe

2010-2013 EUR million.

Rank	Company	TV channels	Country	2010	2011	2012	prov. 2013	2013/12
1	QVC Deutschland GmbH (cons.) *est.*	QVC Deutschland	**DE**	719.0	824.0	778.1	790.5	***1.6%***
2	Home Shopping Europe GmbH *est.*	Home Shopping Europe	**DE**	~	515.1	551.0	589.6	***7.0%***
3	QVC	QVC - The Shopping Channel	**GB**	453.3	467.1	482.8	499.9	***3.5%***
4	Ideal Shopping Direct plc	Ideal World TV	**GB**	137.3	161.0	170.5	163.7	***-4.0%***
5	Sit-Up Ltd (1)	Sit-Up	**GB**	173	157.6	~	~	~
6	Home Shopping Service (HSS)	Best of Shopping, M6 Boutique	**FR**	121.2	130.1	129.6	130	***0.3%***
p.m.	M6 Boutique La Chaîne	M6 Boutique	**FR**	36.8	–	–	–	–
7	Telesopping	Euroshopping	**FR**	74.6	84.6	91.8	105.0	***14.4%***
8	QVC Italia	QVC Italia	**IT**	1.4	25.5	68.1	96.2	***41.3%***
9	1-2-3.TV GmbH	1-2-3 TV	**DE**	98.5	97.1	94.7	~	~
10	Thane Direct UK Ltd	Thane Direct	**GB**	6.9	16.7	38.4	~	~
11	Studio Moderna	Top Shop	**RO**	27.8	33.6	38.1	36.1	***-5.2%***
12	Telemarket S.P.A.	Telemarket	**IT**	63.4	52.7	33.9	30.7	***-9.4%***
13	Euvia Travel GmbH	Sonnenklar	**DE**	25.0	25.0	25.0	~	~
14	Channel 21 GmbH *est.*	Channel 21 Shop	**DE**	78.7	36.7	23.1	~	~
15	Gems TV (UK) (2)	Gems TV	**GB**	15.2	~	~	~	~
16	HSE 24 S.P.A.	Home Shopping Europe	**IT**	–	3.0	13.0	18	***38.5%***
17	European Home Shopping SL	European Home Shopping	**ES**	~	~	~	~	~
18	Studio Moderna 2000 Shop Hungary	Top Shop	**HU**	16.4	18.3	16.1	12.5	***-22.4%***
19	Guthy-Renker U.K. Ltd	TV Shop	**GB**	12.6	10.6	10.7	10.7	***-0.5%***
20	ML TV-Konzept GmbH *est.*	Manoulenz TV	**DE**	–	–	–	10.0	–
21	Mango Media SP z.o.o.	Telezakupy Mango 24	**PL**	17.3	11.5	9.2	~	~
22	JML Direct	JML Direct	**GB**	13.9	12.5	12.8		***-100.0%***
23	Telebazaar Marketing *est.*	Türk Shop	**DE**	5.2	5.2	~	~	~
24	Canal Club de Distribución de Ocio y Cultura S.A.	Canal Club	**ES**	20.6	10.1	4.3		***-100.0%***

(1) Sit-up Ltd went into administration in April 2014.
(2) 2010 over 9 months.

➥ European Audiovisual Observatory

T.3.14 Operating revenues of companies broadcasting home shopping TV channels in the European Union

2009-2013 EUR thousand.

Country	2009	2010	2011	2012	prov. 2013	2013/12
BE	776	1 320	818	0	–	–
BG	741	788	561	769	387	***-49.7%***
CZ		1 795	775	14	~	~
DE	1 285 900	1 405 892	1 497 389	1 488 609	1 540 279	***3.5%***
ES	36 077	36 077	25 566	19 770	~	~
FR	236 850	232 635	214 714	221 365	~	~
GB	771 374	803 171	830 162	873 281	~	~
HU	16 205	16 354	18 328	16 057	12 522	***-22.0%***
IT	68 202	66 565	85 274	124 498	152 093	***22.2%***
LU			258	246	~	~
PL	16 710	17 338	11 454	9 205	~	~
RO	19 277	27 805	33 646	38 050	36 083	***-5.2%***
SK	680	157	78	47	~	~
EUR 28	**2 452 792**	**2 609 898**	**2 719 023**	**2 791 912**	~	~

➥ European Audiovisual Observatory on data from AMADEUS database and company releases

T.3.15 Operating revenues of regional and local television in the European Union

2008-2013 EUR thousand.

Note: Public regional TV in DE, ES, GB not included. Due to the difficulty to maintain comprehensive registers of operational local television and to obtain regular series of their financial accounts, the following table should be considered as an approximation, probably underestimating the real size of this market segment.

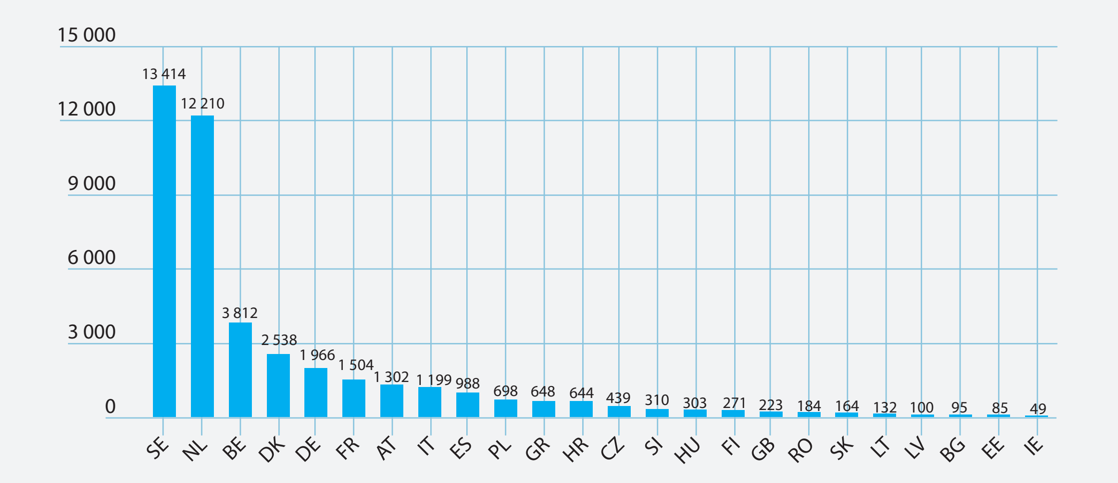
Country	2008	2009	2010	2011	2012	2013	*2013/12*
AT	34 800	34 800	38 053	25 817	37 758	~	~
BE	87 149	85 994	81 735	82 149	80 056	~	~
BG	7 189	6 757	5 869	4 377	3 619	3 788	*4.7%*
CZ	18 117	17 605	23 261	17 061	16 673	~	~
DE	240 451	231 363	229 176	206 701	218 196	~	~
DK	22 987	22 987	23 491	23 055	25 380	~	~
EE	913	868	419	345	340	~	~
ES	311 588	315 353	313 473	271 837	229 288	~	~
FI	1 266	951	1 379	1 907	1 897	~	~
FR	46 067	60 211	65 452	73 911	76 729	70 052	*-8.7%*
GB	2 813	1 648	449	655	668	~	~
GR	27 168	29 251	25 506	23 475	20 094	~	~
HR	13 942	14 442	10 789	10 644	12 235	11 448	*-6.4%*
HU	13 210	13 227	13 085	11 284	11 507	13 101	*13.9%*
IT	570 014	532 553	531 791	474 443	450 889	~	~
LT	3 598	1 736	1 732	1 595	1 585	~	~
LV	2 281	1 682	1 314	1 720	1 999	~	~
NL (1)	158 836	158 888	161 275	160 931	158 727	~	~
PL	9 960	10 496	11 190	10 239	10 471	~	~
PT	105	201	296	199	92	~	~
RO	8 900	7 186	6 987	8 715	8 290	8 558	*3.2%*
SE	45 067	49 823	89 074	134 580	120 730	~	~
SI	8 922	8 871	8 946	8 696	8 049	~	~
SK	10 104	10 267	9 397	9 030	7 043	6 626	*-5.9%*
EUR 28	**1 645 445**	**1 617 159**	**1 654 137**	**1 563 366**	**1 502 313**	~	~
Growth	~	*-1.7%*	*2.3%*	*-5.5%*	*-3.9%*	~	

(1) The population includes mainly public regional TV broadcasting companies and not the broadcasters of small local TV channels on cable.

➥ European Audiovisual observatory from data provided by the AMADEUS database

G.3.3 Average operating revenues of regional and local TV channels in the EU

2012 EUR thousand.



2012 EUR thousand.

➥ European Audiovisual Observatory

T.3.16 The 40 leading private radio companies in Europe
2009-2013 Operating revenues. EUR million.

Rank	Company	Country	2009	2010	2011	2012	2013	2013/12
1	Global Radio Services Limited	GB	218.1	213.2	237.0	245.1	~	~
2	Sociedad Española de Radiodifusion SL	ES	210.2	209.1	187.2	154.5	145.4	-5.9%
3	Radio popular SA Cadena de Ondas populares españolas	ES	84.2	84.5	98.0	90.0	~	~
4	Uniprex [1]	ES	88.7	88.7	89.4	82.8	80.5	-2.8%
5	Europe 1 Télécompagnie	FR	63.4	74.9	78.8	82.1	77.2	-6.0%
6	NRJ	FR	60.3	60.3	66.6	70.6	75.8	7.4%
7	Société pour l'édition radiophonique	FR	79.7	75.7	75.7	74.2	71.4	-3.8%
8	Communicorp Group Limited	IE	65.0	68.4	64.0	58.2	~	~
9	Talksport Limited	GB	41.1	49.0	56.3	59.2	55.3	-6.6%
10	Antern Bayern GmbH *est.*	DE	55.0	55.0	55.0	55.0	55.1	~
11	Radio 538 B.V.	NL	54.1	55.1	~	~	~	~
12	Prof-Media Broadcasting Corporation	RU	33.2	35.2	40.7	54.7	53.1	-2.9%
13	Grupa RMF	PL	~	54.6	51.8	51.4	~	~
14	Radio/Tele FFH GmbH & Co. Betriebs-KG *est.*	DE	45.0	50.0	50.0	50.0	50.5	1.0%
15	Sienna Holding B.V.	NL	41.8	39.7	37.1	35.7	40.2	12.6%
16	P4 Radio Helle Norge	NO	34.1	42.0	40.4	46.6	40.1	-13.9%
17	SBS Discovery Radio AB	SE	21.3	28.2	31.4	36.8	39.6	7.6%
18	Radio Dimensione Suono S.p.A.	IT	42.4	45.1	40.9	36.3	31.9	-12.1%
19	Prisa Radio	ES	4.2	4.4	3.8	31.2	~	~
20	Radio & Telecommunication Enterprises (cons.)	GR	11.5	40.0	36.8	31.7	31.1	-1.9%
21	Société de développement de radiodiffusion	FR	27.4	26.1	26.6	27.7	29.5	6.5%
22	SBS Media Discovery Finland Oy (cons.)	FI	17.5	19.9	23.9	29.5	~	~
23	PPK	RU	12.1	15.6	25.8	28.7	27.7	-3.5%
24	Omroepvereniging Max	NL	13.2	17.9	26.6	~	~	~
25	Classic FM	GB	24.9	21.3	23.3	25.7	~	~
26	Sté d'exploitation Radio Chic	FR	23.0	24.9	24.2	24.7	25.0	1.2%
27	Kronehit Radio Betrieb	DE	14.5	16.0	17.5	20.2	23.3	15.3%
28	Vives Radio S.A.	ES	15.3	23.6	25.7	21.0	22.3	6.2%
29	Radio Nostalgie	FR	27.6	31.8	27.6	23.3	21.9	-6.0%
30	Vortex	FR	23.3	21.4	21.5	22.0	21.6	-1.8%
31	Chérie FM	FR	23.5	29.5	28.3	22.8	21.3	-6.6%
32	UKRD Group	GB	16.9	19.9	18.9	21.6	20.9	-3.2%
33	Performances	FR	20.1	18.6	19.5	20.9	~	~
34	Radiowe Doradztwo Reklamowe	PL	17.1	18.0	17.4	20.5	~	~
35	Cobelfra	BE	15.0	17.2	20.2	20.7	20.2	-2.4%
36	Absolute Radio	GB	16.6	16.9	19.9	20.0	19.8	-1.0%
37	SBS Radio Norge	NO	13.5	10.7	20.6	22.8	19.4	-14.9%
38	Magic 105.4 Limited	GB	18.4	18.4	20.0	18.5	19.2	3.8%
39	Rheinland-Pfälzische Rundfunk GmbH & Co. KG	DE	18.8	18.6	17.8	18.9	~	~
40	Vyberi Radio	RU	9.9	14.1	15.7	19.2	18.0	-6.3%

[1] As of 16/12/2011, Uniprex, S.A.U. was acquired by Publicidad 3.

➥ European Audiovisual Observatory

T.3.17

Operating revenues of private radio companies in the European Union by country of establishment

2008-2012 EUR thousand.

As for local television, our register of radio companies may be not comprehensive and complete set of financial data are not accessible for all countries. The data should be considered as approximations a minima.

Country	2008	2009	2010	2011	2012	2012/11
AT	~	~	~	~	~	~
BE	85 229	65 525	69 622	76 425	81 784	7.0%
BG	17 838	15 024	15 199	15 440	15 686	1.6%
CZ	48 443	46 419	49 502	46 970	43 431	-7.5%
DE	1 221 528	1 173 756	1 191 523	1 217 777	1 224 535	0.6%
DK	42 014	42 016	49 696	49 512	49 700	0.4%
EE	16 217	12 406	10 970	12 771	13 904	8.9%
ES	780 459	705 175	710 417	680 378	632 205	-7.1%
FI	29 139	29 666	30 620	32 658	36 689	12.3%
FR	653 668	624 037	646 312	680 464	688 334	1.2%
GB	802 007	835 229	892 467	906 322	930 664	2.7%
GR	62 497	59 989	53 187	49 824	40 494	-18.7%
HR	44 450	36 650	30 234	30 511	29 660	-2.8%
HU	66 006	60 279	62 338	52 876	48 236	-8.8%
IE	85 010	64 988	68 431	63 961	58 168	-9.1%
IT	324 971	313 944	336 883	312 853	293 382	-6.2%
LT	8 545	6 467	5 948	6 068	6 001	-1.1%
LU	1 274	1 170	1 086	481	481	0.0%
LV	13 129	7 145	6 020	7 018	7 784	10.9%
NL	179 213	158 770	163 714	178 719	178 614	-0.1%
PL	88 056	77 728	83 394	82 883	86 809	4.7%
PT	66 414	63 728	55 508	54 642	50 239	-8.1%
RO	45 460	22 533	24 603	23 108	23 076	-0.1%
SE	113 861	116 749	138 476	147 993	139 524	-5.7%
SI	25 009	24 143	24 393	25 030	25 821	3.2%
SK	16 617	13 735	14 412	13 583	13 103	-3.5%
EU	4 837 055	4 577 271	4 734 955	4 768 267	4 718 323	-1.0%

➥ European Audiovisual Observatory from data published by the AMADEUS database

T.3.18

Breakdown of advertising expenditures by media in the European Union 2009-2013 EUR million.

Country		Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	Total
AT	**2009**	1 380.2	406.9	602.8	165.2	11.5	185.6	228.0	***2 980.2***
	2010	1 491.4	416.6	647.5	174.1	14.3	189.8	265.7	***3 199.3***
	2011	1 596.8	436.1	698.6	173.6	13.8	204.9	300.9	***3 424.7***
	2012	1 236.9	317.2	749.1	179.5	12.8	214.4	326.4	***3 036.3***
	2013	1 262.3	307.8	819.9	181.1	13.5	210.8	354.0	***3 149.5***
BE	**2009**	689.2	261.7	910.1	271.9	21.2	166.2	292.8	***2 613.1***
	2010	612.6	272.0	990.0	299.2	22.1	188.1	332.2	***2 716.3***
	2011	573.5	228.6	974.1	333.9	26.3	191.0	360.3	***2 687.8***
	2012	473.7	198.4	925.7	349.3	28.0	190.8	371.0	***2 537.0***
	2013	478.3	188.0	905.0	363.5	30.2	181.9	390.1	***2 537.0***
BG	**2009**	35.2	30.1	239.6	10.3		10.7	4.9	***330.8***
	2010	33.1	25.4	240.0	6.3		10.6	6.1	***321.6***
	2011	34.8	21.6	260.3	5.8		10.6	6.7	***339.9***
	2012	35.0	19.1	297.2	5.3		9.6	24.4	***390.4***
	2013	28.9	17.0	351.1	5.6		8.5	25.3	***436.4***
CY	**2009**	8.9	7.3	62.6	7.3	1.0	7.0	0.7	***94.8***
	2010	6.3	5.2	59.1	7.0	0.9	5.8	1.1	***85.3***
	2011	4.1	3.9	47.5	6.0	0.5	3.1	2.0	***67.2***
	2012	3.0	2.2	35.5	3.0	0.3	1.5	2.5	***48.0***
	2013	2.4	1.8	28.4	2.4	0.2	1.2	2.0	***38.4***
CZ	**2009**	123.3	74.3	357.5	18.2	2.0	46.2	149.8	***771.5***
	2010	128.5	89.3	358.9	51.6	2.7	52.8	242.5	***926.3***
	2011	119.6	89.9	376.3	50.1	3.1	47.6	236.8	***923.3***
	2012	111.1	85.7	358.8	48.0	2.9	45.1	309.6	***961.2***
	2013	101.2	81.2	327.5	45.2	2.8	45.3	352.2	***955.5***
DE	**2009**	6 211.7	2 447.7	4 003.6	746.3	78.8	811.3	3 091.7	***17 390.9***
	2010	6 210.9	2 497.2	4 349.1	761.3	82.0	842.7	3 567.9	***18 311.0***
	2011	6 168.6	2 506.5	4 379.3	780.1	93.2	986.6	4 178.6	***19 092.8***
	2012	5 745.4	2 314.5	4 441.5	791.6	97.2	954.7	4 253.0	***18 597.9***
	2013	5 325.8	2 297.1	4 537.6	820.7	88.1	980.3	4 676.0	***18 725.7***
DK	**2009**	565.1	179.4	276.5	29.1	7.1	65.9	384.0	***1 507.3***
	2010	534.3	174.3	302.9	31.2	7.9	67.0	453.8	***1 571.4***
	2011	532.4	171.9	337.8	36.2	7.9	72.1	524.2	***1 682.6***
	2012	491.6	156.5	315.7	37.3	9.0	60.7	591.2	***1 662.1***
	2013	454.2	144.4	296.5	38.6	10.7	54.8	639.5	***1 638.8***
EE	**2009**	14.9	2.7	7.1	4.2		4.0	5.9	***38.8***
	2010	18.9	4.2	21.1	6.5		5.7	9.7	***66.0***
	2011	19.8	4.6	22.9	7.2		6.6	11.2	***72.2***
	2012	19.4	4.8	22.3	7.3		7.0	12.0	***72.8***
	2013	18.5	5.2	24.1	7.5		7.8	13.3	***76.4***
ES	**2009**	1 243.0	401.9	2 377.8	537.3	15.4	401.4	666.5	***5 643.4***
	2010	1 124.4	397.8	2 471.9	548.5	24.4	420.8	817.1	***5 804.9***
	2011	1 034.1	381.1	2 237.2	524.9	25.8	421.8	925.5	***5 550.4***
	2012	818.3	313.7	1 815.3	453.5	22.5	422.8	919.9	***4 766.0***
	2013	701.6	253.9	1 703.4	403.6	20.2	282.0	901.0	***4 267.5***
FI	**2009**	582.1	170.7	263.6	55.2	2.7	40.2	208.3	***1 322.9***
	2010	600.6	171.1	295.6	57.8	3.3	43.3	235.3	***1 407.0***
	2011	623.2	174.4	314.4	63.3	3.3	48.9	253.8	***1 481.5***
	2012	617.5	150.1	311.2	61.6	2.3	48.1	274.4	***1 465.2***
	2013	520.4	124.9	305.8	58.6	3.1	46.3	296.6	***1 355.6***

T.3.18 Breakdown of advertising expenditures by media in the European Union

2009-2013 EUR million.

continued

Country		Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	*Total*
FR	**2009**	2 420.7	1 760.6	3 449.8	789.4	84.7	1 255.5	1 760.2	***11 520.9***
	2010	2 226.7	1 800.7	3 836.7	829.6	100.3	1 324.6	2 103.2	***12 221.8***
	2011	2 118.5	1 777.3	3 898.0	834.0	117.1	1 328.0	2 605.9	***12 678.9***
	2012	1 903.3	1 673.6	3 720.8	824.0	117.1	1 305.7	3 343.0	***12 887.4***
	2013	1 771.7	1 505.3	3 589.2	820.6	101.5	1 284.5	3 494.0	***12 566.8***
GB	**2009**	3 640.6	1 280.8	4 166.2	567.3	201.4	877.6	3 973.5	***14 707.4***
	2010	3 764.9	1 251.7	5 004.2	609.5	214.7	1 026.4	4 773.5	***16 644.9***
	2011	3 405.7	1 133.3	5 044.1	613.6	195.2	1 021.3	5 556.7	***16 970.0***
	2012	3 271.7	1 067.6	5 348.4	681.3	265.4	1 195.9	6 715.7	***18 546.1***
	2013	2 870.7	926.2	5 257.2	632.2	216.9	1 165.7	7 421.3	***18 490.2***
GR	**2009**	257.4	565.8	679.0	83.1		295.8	68.5	***1 949.7***
	2010	253.0	474.4	524.8	62.1		196.8	83.7	***1 594.8***
	2011	262.2	295.0	509.7	43.9		83.3	100.2	***1 294.3***
	2012	127.9	140.7	422.5	32.0		41.4	94.0	***858.5***
	2013	188.5	148.4	514.3	33.1			129.0	***1 013.1***
HR	**2009**	40.3	29.2	118.1	16.2		20.8	17.1	***241.7***
	2010	32.8	30.3	110.9	15.2		19.6	20.5	***229.2***
	2011	29.2	26.9	105.9	13.9		18.4	14.8	***209.1***
	2012	27.9	20.2	96.2	12.2		17.6	14.1	***188.3***
	2013	25.7	18.3	96.4	11.2		16.4	15.0	***183.1***
HU	**2009**	91.9	110.5	176.7	38.8	4.4	67.1	82.1	***571.4***
	2010	91.2	105.1	198.0	39.6	5.0	66.4	95.4	***600.7***
	2011	84.5	95.1	214.1	39.4	5.5	68.1	102.7	***609.4***
	2012	77.2	86.3	200.7	52.4	5.4	66.3	120.3	***608.5***
	2013	72.9	63.8	233.1	47.8	4.6	66.9	133.6	***622.7***
IE	**2009**	386.9	16.1	277.0	105.6	6.0	92.1	97.2	***980.8***
	2010	408.2	17.0	283.2	95.1	6.4	89.3	115.6	***1 014.9***
	2011	382.2	15.9	293.2	86.4	5.9	81.5	131.2	***996.2***
	2012	354.3	14.8	274.9	82.6	6.0	77.2	157.0	***966.7***
	2013	324.2	13.5	269.8	78.2	6.9	86.0	197.0	***975.6***
IT	**2009**	1 515.8	991.0	4 358.9	436.3	55.8	260.3	849.5	***8 467.5***
	2010	1 459.0	937.1	4 774.7	470.0	62.5	259.9	1 083.7	***9 046.9***
	2011	1 356.7	852.5	4 624.3	433.2	46.6	230.7	1 298.2	***8 842.1***
	2012	1 115.9	695.2	3 917.5	389.1	37.9	218.7	1 503.0	***7 877.2***
	2013	898.3	528.7	3 526.8	352.9	29.4	205.5	1 700.0	***7 241.7***
LT	**2009**	20.8	10.4	41.8	8.1	0.3	7.9	5.8	***95.0***
	2010	17.3	9.8	44.2	7.5	0.3	7.4	7.2	***93.8***
	2011	17.3	10.1	46.8	7.8	0.3	8.1	8.1	***98.6***
	2012	16.2	10.1	47.5	7.8	0.3	7.5	9.8	***99.3***
	2013	14.5	10.5	47.1	7.8	0.5	7.4	11.3	***99.2***
LU	**2009**	54.0	26.0	15.0	27.0	2.0	5.0		***129.0***
	2010	58.0	26.0	15.0	28.0	2.0	5.0		***134.0***
	2011	57.4	25.8	14.8	28.4	1.9	4.0		***132.3***
	2012	54.4	23.8	13.9	30.7	1.7	6.0		***130.5***
	2013	48.5	23.2	15.5	25.7	1.8	5.5		***120.4***
LV	**2009**	10.8	8.3	29.6	9.3	0.5	8.4	8.6	***75.4***
	2010	7.3	5.8	29.1	7.5	0.4	6.5	8.4	***65.0***
	2011	7.3	6.6	31.0	7.3	0.3	6.4	9.8	***68.8***
	2012	6.4	7.0	32.0	7.5	0.3	6.8	10.9	***70.9***
	2013	6.5	7.7	32.5	8.6	0.3	7.6	10.2	***73.4***

T.3.18

Breakdown of advertising expenditures by media in the European Union 2009-2013 EUR million.

continued

Country		Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	*Total*
MT	**2009**	9.3	4.4	7.1	1.8	0.1	2.6	1.0	***26.3***
	2010	8.6	4.0	7.5	2.0	0.1	2.9	1.3	***26.4***
	2011	7.8	3.9	7.4	2.0	0.2	2.7	1.3	***25.3***
	2012	7.3	3.6	7.1	1.9	0.2	2.5	1.4	***24.0***
	2013	6.9	3.7	7.0	2.0	0.2	2.6	1.5	***23.9***
NL	**2009**	1 178.7	572.5	791.5	234.4	5.0	148.6	815.1	***3 745.8***
	2010	1 090.3	521.5	875.4	246.1	5.0	158.2	1 065.3	***3 961.9***
	2011	997.6	487.6	914.8	248.1	5.3	159.3	1 116.8	***3 929.6***
	2012	848.0	436.4	864.5	232.0	5.4	157.0	1 198.8	***3 742.0***
	2013	818.3	414.6	834.3	240.1	5.5	161.7	1 311.8	***3 786.2***
PL	**2009**	173.4	194.5	655.6	131.9	28.2	141.7	318.7	***1 644.1***
	2010	178.6	199.4	929.4	150.0	38.4	139.2	355.1	***1 990.2***
	2011	156.3	182.3	965.9	160.8	37.3	139.2	437.0	***2 078.9***
	2012	98.2	140.5	884.9	125.5	26.6	118.1	509.3	***1 903.1***
	2013	81.2	147.9	1 010.1	134.2	29.7	119.6	549.1	***2 071.8***
PT	**2009**	285.2	207.4	1 301.4	109.9	15.5	146.4		***2 065.8***
	2010	265.2	219.7	1 405.1	112.1	16.0	138.3		***2 156.3***
	2011	251.0	199.8	1 382.0	122.7	19.9	146.9		***2 122.3***
	2012	243.2	163.4	1 265.8	128.4	18.4	141.5		***1 960.7***
	2013	237.3	152.2	1 462.1	127.1	14.6	140.2		***2 133.6***
RO	**2009**	63.5	58.5	228.6	48.5			18.7	***417.9***
	2010	60.4	60.4	250.2	49.9			21.0	***441.9***
	2011	57.4	58.1	213.6	51.8			20.9	***401.8***
	2012	46.3	52.3	175.8	53.7			22.7	***350.8***
	2013	36.9	38.6	165.0	63.4			24.9	***328.8***
SE	**2009**	908.1	188.5	454.8	65.0	10.7	98.7	517.2	***2 243.0***
	2010	897.8	223.2	598.2	79.4	13.7	124.7	676.6	***2 613.6***
	2011	955.1	236.6	693.8	92.2	15.3	132.9	778.0	***2 903.9***
	2012	868.9	222.3	748.1	84.9	14.3	130.1	1 029.5	***3 098.1***
	2013	799.5	208.0	755.8	77.2	14.9	137.6	1 184.2	***3 177.2***
SI	**2009**	49.8	39.3	47.1	13.9	0.8	18.7	20.5	***190.0***
	2010	51.0	40.5	60.9	13.9	0.8	0.0	24.2	***191.4***
	2011	48.2	40.2	72.5	12.9	0.5	0.0	16.5	***190.8***
	2012	38.9	28.4	76.3	11.1	0.6	18.5	15.8	***189.6***
	2013	31.4	23.3	108.0	9.3	0.2	16.4	16.9	***205.4***
SK	**2009**	53.1	56.4	495.5	44.1	2.5	66.7		***718.2***
	2010	57.8	55.8	510.9	47.7	3.0	69.3	34.4	***778.9***
	2011	50.7	53.1	604.0	43.0	3.0	66.0	47.9	***867.8***
	2012	50.3	50.9	695.8	45.5	4.1	64.4	65.9	***976.8***
	2013	55.1	50.4	780.8	43.5	3.3	62.3	88.9	***1 084.3***

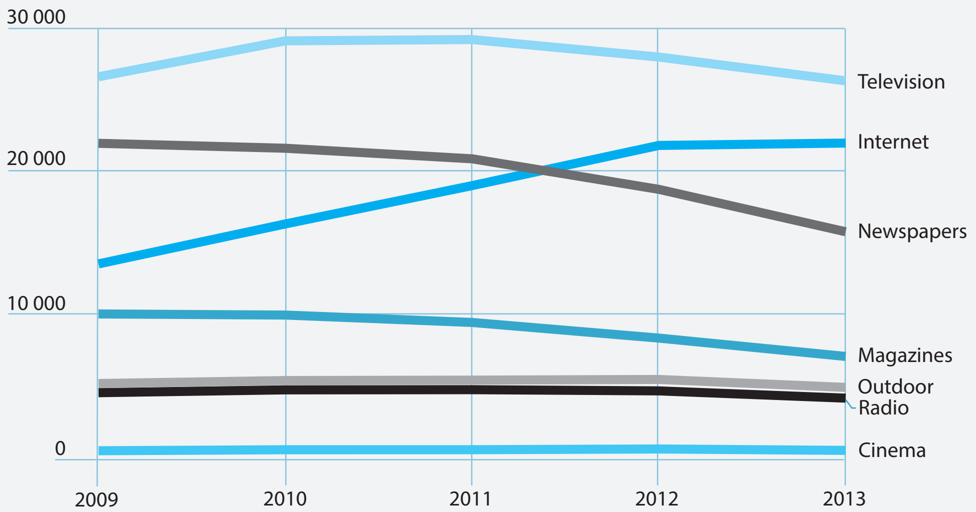
		Newspapers	Magazines	Television	Radio	Cinema	Outdoor	Internet	*Total*
EUR 28	**2009**	**22 013.8**	**10 102.9**	**26 395.0**	**4 575.6**	**557.6**	**5 252.4**	**13 586.3**	**82 483.6**
	2010	**21 689.2**	**10 035.5**	**29 194.5**	**4 808.7**	**626.2**	**5 461.1**	**16 400.6**	**88 215.6**
	2011	**20 952.1**	**9 518.7**	**29 284.3**	**4 822.5**	**628.2**	**5 490.0**	**19 046.1**	**89 742.4**
	2012	**18 708.2**	**8 399.3**	**28 065.0**	**4 739.0**	**678.6**	**5 529.9**	**21 895.6**	**88 015.4**
	2013	**17 236.1**	**7 715.9**	**27 748.4**	**4 594.3**	**593.9**	**5 224.8**	**23 741.7**	**86 533.1**
	2013/12	***-7.9%***	***-8.1%***	***-1.1%***	***-3.1%***	***-12.5%***	***-5.5%***	***8.4%***	***-1.7%***

➡ Warc and IP Key Facts (for Luxembourg) / European Audiovisual Observatory

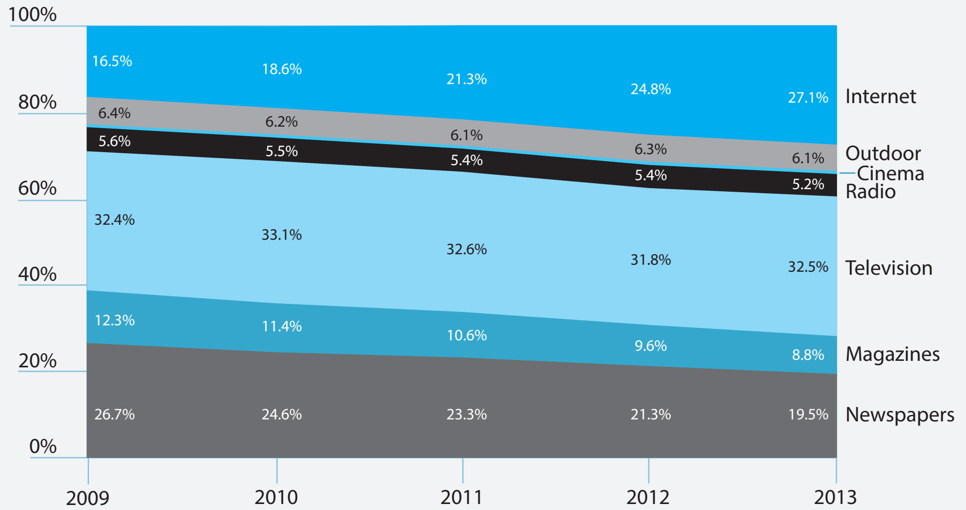
G.3.4

Breakdown of advertising expenditures by media in the European Union

2009-2013 EUR million.



2009-2013 EUR million.



2009-2013 In %.

European Audiovisual Observatory on Warc data

The development of the advertising market

European advertising market trends according to Warc

According to surveys carried out by Warc, advertising expenditure in the European Union, which rose by 6.9% in 2010 and by 1.7% in 2011, weakened again in 2012 (-1.9%) and in 2013 (-1.8%). In 2013, the biggest falls were recorded in Cyprus (-20%), Spain (-10.5%), Italy (-8.1%) and Finland (-7.5%). The recession was less serious in France (-2.5%) and the United Kingdom (-0.3%), whereas the German market posted a very small rise (0.7%). Overall, the central and eastern European markets enjoyed significant growth (Bulgaria +11.8%, Slovakia +11%, Poland +8.9%, Slovenia +8.3%, Estonia +4.9%, Latvia +3.5%, Hungary +2.3%), but the recession was confirmed in two markets (Romania -6.3%, Croatia -2.8%).

The trend in the period 2009-2013 is the same in all EU countries: a strong decline in print media advertising expenditure (daily newspapers and magazines), to the benefit of the Internet. From 2009 to 2013, the proportion of press advertising expenditure in the EU fell from 38.9% to 28.8%, whereas the proportion of Internet advertising expenditure went up from 16.5% to 27.5%. The proportion of television advertising expenditure was between 32.5% and 31% and radio and cinema advertising also remained stable, whereas the proportion of display advertising went down slightly.

In 2013, television advertising expenditure kept on falling in Spain (-10.5%), Italy (-10%), France (-3.5%), and the United Kingdom (-1.7%) and rose only slightly in Germany (0.7%).

The United Kingdom is the country with the highest Internet advertising expenditure, which accounted for 40.1% of the total in 2013. In Germany, the Internet's market share was 25% in 2013, compared with 27.8% in France, 23.5% in Italy and 21.1% in Spain.

Internet advertising expenditure according to the IAB

According to the AdEx Benchmark survey conducted by the Internet Advertising Bureau (IAB), Internet advertising expenditure in Europe (26 markets) reached EUR 27.3 billion in 2013, which is an increase of 11.9% over 2012. According to this survey, this represented 26.7% of the expenditure across all media, exceeding that of the print media (19.5%) but still lower than television advertising expenditure (31.6%). The rate of growth of Internet advertising expenditure was slightly higher than that of the previous

L'évolution du marché publicitaire

Les tendances du marché publicitaire européen selon Warc

Selon les analyses du Warc, les investissements publicitaires dans l'Union européenne, qui avaient connu un regain de croissance de 6,9 % en 2010 et de 1,7 % en 2011, ont faibli en 2012 (-1,9 %) et en 2013 (-1,8 %). En 2013, les chutes les plus fortes ont été enregistrées à Chypre (-20 %), en Espagne (-10,5 %), en Italie (-8,1 %) et en Finlande (-7,5 %). La récession a été moindre en France (-2,5 %) et au Royaume-Uni (-0,3 %), tandis que le marché allemand connaissait une très légère hausse (0,7 %). Les marchés d'Europe centrale et orientale ont, dans l'ensemble, connu une belle croissance (Bulgarie, +11,8 %, Slovaquie, +11 %, Pologne +8,9 %, Slovénie : +8,3 %, Estonie, +4,9 %, Lettonie, +3,5 %, Hongrie +2,3 %), mais deux d'entre eux ont vu se confirmer la récession (Roumanie, -6,3 %, Croatie, -2,8 %).

Dans tous les pays de l'Union européenne, la tendance durant la période 2009-2013 est la même : fort déclin des investissements sur la presse écrite (quotidiens et magazines) au bénéfice d'Internet. De 2009 à 2013, la part des investissements presse (quotidiens et magazines) dans l'Union européenne est tombée de 38,9 % à 28,8 % tandis que la part des investissements sur Internet passait de 16,5 % à 27,5 %. La part de la télévision oscille entre 32,5 et 31 %. Les parts de la radio et de la publicité dans les salles de cinéma restent également stables tandis que l'affichage a connu un léger recul.

En 2013, les investissements publicitaires en télévision ont continué de baisser en Espagne (-10,5 %), en Italie (-10 %), en France (-3,5 %), au Royaume-Uni (-1,7 %) et n'ont progressé que faiblement en Allemagne (0,7 %).

Le Royaume-Uni est le pays où la publicité sur Internet atteint son plus haut niveau ; en 2013 elle représentait 40,1 % des investissements publicitaires. En Allemagne, en 2013, la part de marché d'Internet était de 25 %, contre 27,8 % en France, 23,5 % en Italie et 21,1 % en Espagne.

Les investissements publicitaires sur Internet selon IAB

Selon l'étude AdEx Benchmark de l'Internet Advertising Bureau (IAB), les investissements publicitaires sur Internet en Europe (26 marchés) auraient atteint 27,3 milliards EUR en 2013, soit une augmentation de 11,9 % par rapport à 2012. Toujours selon cette étude, les investissements sur Internet représentaient 26,7 % des investissements sur l'ensemble des médias, dépassant la presse écrite (19,5 %)

Entwicklung des Werbemarktes

Trends im europäischen Werbemarkt nach Warc

Nach den Analysen von Warc sind die Werbeinvestitionen in der Europäischen Union – nach einem Plus von 6,9 % 2010 und 1,7 % 2011-2012 (-1,6 %) – 2013 (-1,8 %) wieder gesunken. Den stärksten Einbruch gab es 2013 in Zypern (-20 %), Spanien (-10,5 %), Italien (-8,1 %) und in Finnland (-7,5 %). Wesentlich schwächer war der Rückgang der Werbeinvestitionen in Frankreich (-2,5 %) und im Vereinigten Königreich (-0,3 %). Auf dem deutschen Werbemarkt hat es dagegen ein leichtes Plus gegeben (0,7 %). Stärker gewachsen sind die Werbemärkte in Mittel- und Osteuropa (Bulgarien, +11,8 % ; Slowakei, +11 % ; Polen, +8,9 % ; Slowenien, +8,3 % ; Estland, +4,9 % ; Lettland, +3,5 % und Ungarn +2,3 %), aber in zwei osteuropäischen Ländern hat sich 2013 die Rezession bestätigt (Rumänien -6,3 % und Kroatien, -2,8 %).

In allen Ländern der Europäischen Union war der Trend im Zeitraum 2009-2013 derselbe: deutlicher Rückgang der Investitionen in den Printmedien (Tageszeitungen und Magazine), wovon das Internet profitierte. Von 2009 bis 2013 fiel in der Europäischen Union der Anteil der Werbeinvestitionen in der Presse von 38,9 % auf 28,8 %, während der Anteil des Internets an den Werbeinvestitionen von 16,5 % auf 27,5 % anstieg. Der Anteil des Fernsehens schwankte zwischen 32,5 % und 31 %. Der Anteil der Werbung im Radio und in Kinos blieb ebenfalls stabil, während die Plakatwerbung leicht zurückgegangen ist.

Einen Rückgang der Investitionen in die Fernsehwerbung verzeichneten 2013 Spanien (-10,5 %), Italien (-10 %), Frankreich (-3,5 %) und das Vereinigte Königreich (-1,7 %). Lediglich Deutschland meldete einen leichten Zuwachs (0,7 %).

Das Vereinigte Königreich ist das Land mit dem größten Anteil an Internetwerbung: 2013 waren es 40,1 % der Werbeinvestitionen. In Deutschland lag der Marktanteil des Internets 2013 bei 25 % gegenüber 27,8 % in Frankreich, 23,5 % in Italien und lediglich 21,1 % in Spanien.

Werbeinvestitionen im Internet nach IAB

Nach der Studie AdEx benchmarking des Internet Advertising Bureau (IAB) betrugen die Internet-Werbeinvestitionen in Europa (26 Märkte) 2013 27,3 Mrd. EUR, was einem Anstieg von 11,9 % gegenüber 2012 entspricht. Weiterhin geht aus dieser Studie hervor, dass die Internetinvestitionen 26,7 % sämtlicher Investitionen in den Medien year (11.5%). The growth was stronger in Central and Eastern Europe (+21.2%) than in Western Europe (+10.8%). Russia recorded the strongest growth (+27.8%), overtaking Italy and positioning itself as the fourth strongest market behind the United Kingdom (EUR 7.3 billion), Germany (EUR 4.6 billion) and France (EUR 3.4 billion). Two countries recorded a fall in Internet advertising expenditure: Spain and Slovenia.

Display advertising enjoyed the strongest growth (14.9%) and, with a figure of EUR 9.2 billion, accounted for 33.8% of Internet advertising expenditure. The most important segment was search tool advertising (EUR 13.4 billion, +13%). Online video advertising rose by 45.1% and reached EUR 1.03 billion (17 countries). Mobile device advertising grew by 130.7% and reached EUR 937.8 million (18 countries).

Breakdown of Internet advertising expenditure in the United Kingdom according to the Advertising Association

The data on Internet advertising expenditure are currently quite limited, and for most countries no breakdown is available by type of website (TV broadcasters, press, video sharing sites such as YouTube, "pure play" social networking sites, etc). Neither is there a breakdown available by type of advertising (banners, pre/post roll advertisements, pop-ups, etc). Nonetheless, data are currently published for the United Kingdom by the Advertising Association/Warc (T.3.19). According to this source, advertising on television channels' websites in 2013 amounted to GBP 126 million, a rise of 21.2%. Advertising on newspaper websites (national and regional dailies and magazines) amounted to GBP 575 million (up 10.8%).

mais toujours inférieurs aux investissements en télévision (31,6 %). Le taux de croissance des investissements sur Internet était légèrement supérieur à celui de l'année précédente (11,5 %). La croissance était plus marquée en Europe centrale et orientale (+21,2 %) qu'en Europe occidentale (+10,8 %). La Russie est le pays qui a connu la croissance la plus forte (+27,8 %), dépassant l'Italie et se positionnant comme quatrième marché derrière le Royaume-Uni (7,3 milliards EUR), l'Allemagne (4,6 milliards EUR) et la France (3,4 milliards EUR). Deux pays ont affiché une récession des investissements publicitaires sur Internet : l'Espagne et la Slovénie.

L'affichage a connu la plus forte croissance (14,9 %) et, avec 9,2 milliards EUR représente 33,8 % des investissements publicitaires sur Internet. Le segment le plus important est la publicité sur les outils de recherche (13,4 milliards EUR, +13 %). La publicité sur la vidéo en ligne a augmenté de 45,1 % pour atteindre 1,03 milliard EUR (17 pays). La publicité d'affichage sur les mobiles a connu une croissance de 130,7 % pour atteindre 937,8 millions EUR (18 pays).

La ventilation des investissements publicitaires sur Internet au Royaume-Uni selon Advertising Association

Les données sur les investissements publicitaires sur Internet sont pour l'instant encore assez sommaires : pour la plupart des pays, on ne dispose en effet pas de la ventilation par type de sites (sites de diffuseurs TV, sites de presse, sites de partages vidéo tels que YouTube, réseaux sociaux « pure players », etc.). On ne dispose généralement pas non plus de ventilation par type de publicité (bannières, *pre/post roll* insérée en début ou en fin de séquences vidéo, *pop-up*, etc.). Néanmoins, des données sont à présent publiées pour le Royaume-Uni par Advertising Association/Warc (T.3.19). Selon cette source, en 2013, la publicité sur les sites des chaînes de télévision représentaient 126 millions GBP, en hausse de 21,2 %. La publicité sur les sites des journaux (quotidiens nationaux, régionaux et magazines) représentait 575 millions GBP (en hausse de 10,8 %).

ausmachten und dabei vor den Printmedien (19,5 %), aber immer noch hinter dem Fernsehen lagen (31,6 %). Die Wachstumsrate der Investitionen im Internet war etwas höher als im Vorjahr (11,5 %). Das Wachstum war in Mittel- und Osteuropa stärker ausgeprägt (21,2 %) als in Westeuropa (10,8 %). Russland war das Land mit dem stärksten Wachstum (27,8 %) und liegt nun vor Italien auf dem vierten Platz hinter dem Vereinigten Königreich (7,3 Mrd. EUR), Deutschland (4,6 Mrd. EUR) und Frankreich (3,4 Mrd. EUR). Zwei Länder verzeichneten einen Rückgang der Internet-Werbeinvestitionen: Spanien und Slowenien.

Am stärksten gewachsen ist die Online-Displaywerbung (14,9 %). Diese Form der Werbung macht mit 9,2 Mrd. EUR 33,8 % der Werbeinvestitionen im Internet aus. Das bedeutendste Segment ist die Werbung in Suchmaschinen (13,4 Mrd. EUR, +13 %). Die Werbung in Online-Videos legte um 45,1 % zu und kam auf 1,03 Mrd. EUR (17 Länder). Die Werbung auf Mobiltelefonen stieg um 130,7 % auf 937,8 Mio. EUR (18 Länder).

Aufschlüsselung der Internet-Werbeinvestitionen im Vereinigten Königreich nach der Advertising Association

Die Daten zu den Werbeinvestitionen im Internet sind derzeit noch nicht sehr detailliert: Für die meisten Länder liegt keine Aufschlüsselung nach Art des Internetauftritts vor (Website eines Fernsehveranstalters oder eines Presseunternehmens, Videotauschbörse wie YouTube, soziales Netzwerk, „Pure Player" usw.). In der Regel verfügen wir auch über keine Aufschlüsselung nach Art der Werbung (Banner, Werbeeinblendung vor bzw. nach dem Video *(pre/post roll)*, Pop-up-Banner usw.). Dennoch werden nun Daten von Advertising Association/Warc für das Vereinigte Königreich veröffentlicht (T.3.19). Demnach wurde 2013 in den Internetauftritten von Fernsehveranstaltern Werbung für einen Betrag von 126 Mio. GBP geschaltet, ein Plus von 21,2 %. Die Ausgaben für Werbung auf den Internetseiten von Printmedien (überregionale und regionale Tageszeitungen sowie Magazine) betrugen 575 Mio. GBP (ein Plus von 10,8 %).

T.3.19

UK advertising expenditure
2013-2015

Broadcaster VoD adspend and digital revenues for newsbrands and magazine brands are included within the Internet total of GBP 6281 million.

So care should be taken to avoid double counting. The IAB revised H1 2013 internet adspend in October 2014 and this is reflected in these numbers.

Internet includes revenues for online, mobile and tablet.

	Adspend 2013 in GBP million	Share 2013	*2013/12 (% change)*	Forecast 2014 (% change)	Forecast 2015 (% change)
TV	4 642	26.5%	***3.6%***	7.8%	6.6%
of which spot advertising	4 233	24.2%	***2.9%***	6.7%	5.2%
of which broadcaster VoD	126	0.7%	***21.2%***	27.0%	31.3%
Radio	537	3.1%	***-2.9%***	6.8%	4.5%
Out of home	990	5.7%	***2.0%***	3.4%	5.5%
National newsbrands	1 447	8.3%	***-4.8%***	-2.8%	1.0%
of which digital	184	1.1%	***19.5%***	15.4%	22.8%
Regional newsbrands	1 300	7.4%	***-7.3%***	-5.0%	-4.3%
of which digital	139	0.8%	***7.9%***	17.4%	8.1%
Magazine brands	1 038	5.9%	***-5.7%***	-3.3%	0.1%
of which digital	252	1.4%	***7.1%***	6.9%	9.5%
Cinema	185	1.1%	***-14.5%***	67.0%	5.5%
Internet	6 281	35.9%	***15.6%***	15.1%	13.1%
of which mobile	1 021	5.8%	***95.2%***	56.0%	42.8%
Direct mail (1)	1 856	10.6%	~	-1.0%	1.0%
Total UK adspend	**17 511**	**100.0%**	***3.9%***	**6.4%**	**6.5%**

(1) Not available due to a change in data collection methodology in 2012.

➥ Advertising Association/Warc Expenditure Report October 2014

CHAPTER
CHAPITRE
KAPITEL
4

Television services

Les services de télévision

Fernsehdienste

Contents	Sommaire	*Inhalt*	

Supply of TV channels

Fewer TV channels launched in the European Union in 2013

The European television market saw an 8% decrease in the number of channels launched in 2013. In comparison to 2012, when 369 new channels were launched, the year 2013 just saw 339 new channels that went on air in the European Union. A total of 43% of these were channels broadcasting in HD (146 High definition simulcasts) which, like in the previous year, represented a major growth factor for the market.When considering all channels in the MAVISE database (EU plus eleven other European countries) a total of 404 were launched in 2013.

36 new digital terrestrial channels launched in the European Union in 2013

The ongoing expansion of digital terrestrial networks in Europe and the end of analogue terrestrial transmissions saw the launch of a further 36 new terrestrial channels in 2013 (following 86 in 2012, and the launch of 56 channels in 2011). Almost half of these (47%) were national public service channels (17), 39% were national private channels (14), and 14% either local or regional channels (a total of five, of which three were public). The majority of TV channels were HD simulcasts that included among others the launch of five BBC HD channels in the UK, four YLE HD channels in Finland, and two ARD HD channels in Germany (plus three regional HD simulcasts of HR, MDR and RBB). In Denmark, DR 3, a new public generalist channel targeting a younger audience of 15-39 year olds was launched alongside the new children's channel DR Ultra and in the Czech Republic another public children's channel called CT D went on air. Following a consultation in the UK, it was decided to launch 21 local television channels over the DTT networks. In 2014, thirteen channels launched on the new Multiplex.

Number of channel closures remains stable in 2013

The pace of TV channel closures in the EU remained stable for two consecutive years. In comparison to 2011, when 143 channels were closed down, just 62 channels closed in the EU each year in 2012 and 2013. These included the three TV channels by the Greek public service broadcaster ERT which were closed down by the government by ministerial decree on 11 June 2013. Among the closed TV channels were a total of 12 HD channels, 10 TV fiction, 8 entertainment and 5 sports channels, mainly from the UK, Poland and Romania. In the UK, ESPN America stopped in July 2013 and in Poland, the Npremium brand was replaced by nFilm as part of the merger

L'offre des chaînes

Moins de chaînes de télévision lancées dans l'Union européenne en 2013

Le marché européen de la télévision a vu le nombre de chaînes lancées en 2013 diminuer de 8 % : seules 339 nouvelles chaînes ont commencé à émettre dans l'Union européenne, contre 369 en 2012. Il s'agit pour 43 % d'entre elles de chaînes diffusées en HD (146 en diffusion multisupport haute définition). Comme l'année précédente, elles représentent un important facteur de croissance pour le marché. Sur l'ensemble des chaînes répertoriées dans la base de données MAVISE (UE et onze autres pays européens), 404 ont été lancées en 2013.

36 nouvelles chaînes numériques terrestres lancées dans l'Union européenne en 2013

En conséquence de l'extension continue des réseaux numériques terrestres en Europe et de l'arrêt des transmissions analogiques terrestres, seules 36 nouvelles chaînes terrestres ont été lancées en 2013 (contre 86 en 2012, et 56 en 2011). Près de la moitié d'entre elles (47 %) sont des chaînes de service public nationales (17), 39 % des chaînes privées nationales (14), et 14 % des chaînes régionales ou locales (soit cinq au total, dont trois publiques). Les chaînes à diffusion multisupport HD sont majoritaires, notamment cinq chaînes HD de la BBC lancées au Royaume-Uni, quatre chaînes HD de YLE en Finlande, et deux chaînes HD d'ARD en Allemagne (plus trois diffusions multisupport HD régionales de RH, MDR et RBB). Au Danemark, DR 3, nouvelle chaîne généraliste publique ciblant les 15-39 ans, a été lancée aux côtés de la nouvelle chaîne jeunesse DR Ultra et en République tchèque une autre chaîne jeunesse dénommée CT D a commencé à émettre. A la suite d'une consultation au Royaume-Uni, il a été décidé de lancer 21 chaînes de télévision locales sur les réseaux TNT. En 2014, treize chaînes étaient lancées sur le nouveau multiplex.

Stabilité du nombre de fermetures de chaînes en 2013

Le rythme des fermetures de chaînes de télévision dans l'Union européenne est resté stable pendant deux années consécutives. Par rapport à 2011, année au cours de laquelle 143 chaînes ont été fermées, seules 62 chaînes ont cessé d'émettre dans l'UE en 2012 et en 2013. Il s'agit notamment des trois chaînes de télévision du radiodiffuseur de service public grec ERT, fermées par le gouvernement par décret ministériel le 11 juin 2013. Les chaînes de télévision fermées concernent, notamment, 12 chaînes HD, 10 chaînes de fiction, 8 de divertissement et 5 de sport, principalement au Royaume-Uni, en Pologne et en Roumanie. Au Royaume-Uni, ESPN

Fernsehangebot

2013 weniger neue Fernsehsender in der Europäischen Union

2013 gab es auf dem europäischen Fernsehmarkt 8 % weniger neue Fernsehsender als im Vorjahr. Waren es 2012 noch 369 Sender, die in der Europäischen Union den Betrieb aufnahmen, so waren es 2013 nur noch 339. Davon sendeten bereits 43 % in HD (146 High definition Simulcast) – ein bedeutender Wachstumsfaktor für den Fernsehmarkt. Berücksichtigt man alle Länder, deren Daten in der MAVISE-Datenbank gespeichert sind (EU plus elf weitere europäische Länder), dann steigt die Zahl der neuen Fernsehsender 2013 auf 404.

36 neue digitale terrestrische Sender 2013 in der EU

Im Zuge des laufenden Ausbaus der DVB-T-Netze in Europa und der Abschaltung des analogen Antennenfernsehens wurden 2013 36 neue terrestrische Sender in Betrieb genommen (nach 86 im Jahr 2012 und 56 2011). Bei rund der Hälfte dieser Sender (47 %) handelt es sich um landesweite öffentlich-rechtliche Sender (17), 39 % waren landesweite private Sender (14) und 14 % entweder lokale oder regionale Sender (von den insgesamt fünf waren drei öffentlich-rechtliche). Die meisten der Fernsehsender waren HD Simulcasts, darunter unter anderem fünf neue HD-Sender der BBC im Vereinigten Königreich, vier YLE HD-Sender in Finnland und zwei HD-Sender der ARD in Deutschland (plus drei regionale HD Simulcasts des HR, MDR und von RBB). In Dänemark ging DR 3 auf Sendung, ein neuer öffentlich-rechtlicher Sender mit Vollprogramm, der sich in erster Linie an jüngere Zuschauer im Alter von 15-39 Jahren richtet, neben dem neuen Kinderkanal DR Ultra, und in der Tschechischen Republik nahm ein weiterer Kinderkanal den Sendebetrieb auf, CT D. Im Anschluss an eine Konsultation im Vereinigten Königreich wurde beschlossen, 21 lokale Fernsehkanäle über die DVB-T-Netze zu übertragen. 2014 hatten bereits dreizehn Sender ihren Betrieb über den neuen Multiplex aufgenommen.

Die Zahl der Sender, die ihren Betrieb eingestellt haben, blieb 2013 stabil

Die Anzahl der Fernsehsender, die abgeschaltet wurden, ist in der EU zwei Jahre in Folge gleich geblieben. Mussten 2011 noch 143 Sender ihren Betrieb einstellen, so waren es in den Jahren 2012 und 2013 nur noch jeweils 62. Darunter waren auch die drei Fernsehsender des öffentlich-rechtlichen Fernsehsenders ERT in Griechenland, die am 11. Juni 2013 per Ministerialerlass abgeschaltet wurden. Unter den Sendern, die 2013 ihren Betrieb eingestellt haben, waren insgesamt 12 HD-Sender, 10 TV-Spielfilmkanäle, 8 Unterhaltungs- und 5 Sportsender, in erster Linie aus dem Vereinigten Königreich, Polen und Rumänien. Im Vereinigten Königreich wurde im Juli 2013 der Sportsender ESPN America of the satellite platforms n and Cyfra+ to nc+. A total of 5 news channels closed, including two in the Nordic countries. Danish public channel DR Update, originally launched in 2007, and TV4 News, launched in 2012 as Sweden's first 24/7 news channel, closed for reasons of not being profitable. Other closures were Slovenia's Info TV (i-tv), Spanish regional public channel Canal Nou 24 and the free satellite channel Aden Live TV.

More than 10 800 channels available in Europe, including 8 817 channels established in the European Union

At the end of 2013, according to graphic G.4.1, there were 10 897 television channels available in 37 member states of the European Audiovisual Observatory (8 817 in the EU 28). Of those 35% are regional or local channels and 65% are national and international channels. The total number of channels that are established in the EU is 10 428.

Majority of television channels in the EU originate from the United Kingdom and six other countries

The United Kingdom continues to be the major "home" of television channels in the EU. The country tops the table with 1561 channels established there at the end of 2013 (table T.4.1). A total of 65% of the channels established in the UK are broadcasting to other European countries, and this includes the many linguistic versions of channels such as Disney Cinemagic, Viasat Explorer etc. Following the United Kingdom are Spain (884), France (689), Italy (656), Germany (630) and Hungary (561). Regional and local channels are particularly numerous in most of these countries, in contrast to the United Kingdom.

Other important centres for the establishment of television channels that target other countries include France (with 215 channels targeting abroad), Sweden (160 mainly targeting Nordic and Baltic states), the Czech Republic (109 pan-European brand channels targeting central and south eastern Europe) and the Netherlands (99 - mainly adult channels).

Important genres of channels available in Europe: HD and sport in the lead

According to graphic G.4.1, the three most predominant genres (when one excludes local and regional channels), are HD simulcasts (1 001), sport (742) and entertainment channels (590). Other important genres include generalist (527), film (505), music (416) and children's channels (376). The number of high definition simulcasts of existing channels available in the 39 member states of the European Audiovisual Observatory has seen another

America a cessé d'émettre en juillet 2013 et en Pologne, la marque Npremium a été remplacée par nFilm dans le cadre de la fusion des plates-formes satellitaires n et Cyfra+ en nc+. Au total, 5 chaînes d'information ont fermé, dont deux dans les pays nordiques. La chaîne publique danoise DR Update, lancée en 2007, et TV4 News, lancée en 2012 en tant que première chaîne suédoise d'information émettant 24h/24 7j/7, ont fermé parce qu'elles n'étaient pas rentables. La chaîne slovène Info TV (i-tv), la chaîne publique régionale espagnole Canal Nou 24 et la chaîne par satellite gratuite Aden Live TV ont également fermé.

Plus de 10 800 chaînes disponibles en Europe, dont 8 817 établies dans l'Union européenne

A la fin de l'année 2013 (voir graphique G.4.1), on dénombre 10 897 chaînes de télévision établies dans 37 pays européens membres de l'Observatoire (8 817 pour l'Union européenne – EU 28). Parmi ces chaînes, 35 % sont des chaînes régionales ou locales et 65 % sont internationales et nationales. Le nombre total de chaînes établies dans l'Union européenne est de 10 428.

Les chaînes de télévision dans l'Union européenne sont majoritairement originaires du Royaume-Uni et de six autres pays

Le Royaume-Uni reste le principal « pays d'accueil » des chaînes de télévision dans l'Union européenne. Il domine avec 1 561 chaînes recensées fin 2013 (tableau T.4.1). 65 % des chaînes établies au Royaume-Uni émettent vers d'autres pays européens et ce chiffre comprend de nombreuses versions linguistiques de chaînes telles que Disney Cinemagic, Viasat Explorer, etc. Viennent ensuite l'Espagne (884), la France (689), l'Italie (656), l'Allemagne (630) et la Hongrie (561). Les chaînes régionales et locales sont particulièrement nombreuses dans la plupart de ces pays, au contraire du Royaume-Uni.

Nombreuses sont également les chaînes de télévision établies dans un pays et émettant vers l'étranger. Il en est ainsi pour la France (215 chaînes), la Suède (160 chaînes ciblant surtout les pays nordiques et les pays baltes), la République tchèque (109 chaînes pan-européennes ciblant l'Europe centrale et du Sud-Est) et les Pays-Bas (99, principalement des chaînes pour adultes).

Principaux genres de chaînes disponibles en Europe : HD et sport en tête

Selon le graphique G.4.1, les trois genres prédominants (si l'on exclut les chaînes locales et régionales), sont la diffusion multisupport HD (1001), le sport (742) et le divertissement (590). D'autres genres importants sont les chaînes généralistes

abgeschaltet, und in Polen wurden im Zuge der Fusion der beiden Satellitenplattformen n und Cyfra+ zu nc+ die Npremium-Sender durch nFilm ersetzt. Insgesamt stellten 5 Nachrichtensender ihren Betrieb ein, zwei davon in den skandinavischen Ländern. Der dänische öffentlich-rechtliche Sender DR Update, erstmals 2007 auf Sendung, und TV4 News, 2012 als Schwedens erster 24-Stunden-Nachrichtensender gestartet, mussten wegen mangelnder Rentabilität schließen. Ebenfalls abgeschaltet wurden Info TV (i-tv) in Slowenien, der regionale öffentlich-rechtliche Sender Canal Nou 24 in Spanien und der frei empfangbare Satellitensender Aden Live TV.

Mehr als 10 800 Sender in Europa, darunter 8 817 in der Europäischen Union

Ende 2013 gab es laut Abbildung G.4.1 in 37 Mitgliedstaaten der Europäischen Audiovisuellen Informationsstelle 10 897 Fernsehsender (8 817 für die 28 EU-Mitgliedstaaten). 35 % davon sind regional oder lokal und 65 % international oder national ausgelegt. Die Gesamtzahl der in der EU ansässigen Sender liegt bei 10 428.

Die meisten Fernsehsender in der EU stammen aus dem Vereinigten Königreich und sechs weiteren Ländern

Das Vereinigte Königreich ist nach wie vor die Heimat der meisten Fernsehsender in der EU. Das Land steht mit 1 561 Sendern Ende 2013 auf Platz eins (Tabelle T.4.1). 65 % der dort ansässigen Sender strahlt ihr Programm auch auf andere Länder Europas aus, darunter die zahlreichen Sprachversionen von Kanälen wie Disney Cinemagic, Viasat Explorer usw. Hinter dem Vereinigten Königreich folgen Spanien (884), Frankreich (689), Italien (656), Deutschland (630) und Ungarn (561), wobei die Regional- und Lokalsender in den meisten dieser Länder – im Gegensatz zum Vereinigten Königreich – besonders zahlreich vertreten sind.

Andere wichtige Zentren für die Etablierung von Fernsehsendern, deren Programme auch in andere Länder ausgestrahlt werden, sind Frankreich (mit 215 Kanälen, die ins Ausland senden), Schweden (160 Sender, die vor allem in andere nordische Staaten und in die baltischen Staaten senden), die Tschechische Republik (109 paneuropäische Kanäle, die vor allem nach Mittel- und Südosteuropa senden) und die Niederlande (99 – hauptsächlich so genannte „Erwachsenensender").

Wichtige Fernsehgenres in Europa: an der Spitze HD und Sport

Graphik G.4.1 zufolge sind die drei wichtigsten Genres (ohne lokale und regionale Sender) HD Simulcasts (1001), Sport (742) und Unterhaltungssender (590). Es folgen Sender mit Vollprogramm (527), Film- (505), Musik- (416) und Kindersensignificant increase from 709 at the end of 2012 to 1001 at the end of 2013.

In addition, there are more than 100 channels that are specific HD channels (without a standard definition version).

A systematic survey of television channels

The rise in the number of reception platforms, special-interest and local channels and the increase in transnational broadcasting is gradually changing the national audiovisual landscapes. This development poses major problems when it comes to producing a summary description of the availability of channels in Europe. In order to present a relevant summary, we think it is important to distinguish between two fundamentally different statistical approaches in connection with counting the number of channels:

- one approach involves counting the number of channels established in a country;
- the other involves describing the choices available to viewers.

These two approaches differ fundamentally because the first is based on counting the actual providers and the services they offer, whether or not they are aimed at the national audience. However, some states, which benefit from the opportunities opened up by the European legal framework (European Convention on Transfrontier Television, Television without Frontiers Directive), have become hosts for service providers that broadcast to other European territories or even Europe as a whole.

On the other hand, the description of a national market and of the choices available to viewers would not make much sense in several countries if no account were taken of the presence of channels originating from abroad, especially "foreign dedicated channels". In order to identify the existing television channels, the Observatory now refers to the MAVISE database (http://mavise.obs.coe.int).

The survey was produced on the basis of lists drawn up by national regulatory bodies and from other available sources, in particular the Lyngsat website (http://www.lyngsat.com), which provides complete and regularly updated information on the radio and television services available on the entire global satellite fleet.

(527), de cinéma (505), de musique (416) et jeunesse (376). Le nombre de diffusion multisupport haute définition de chaînes existantes disponibles dans les 39 États membres de l'Observatoire européen de l'audiovisuel a fortement augmenté, passant de 709 fin 2012 à 1 001 fin 2013. En outre, plus de 100 chaînes sont des chaînes exclusivement HD (sans version en définition standard).

Un recensement systématique des chaînes de télévision

La multiplication des plates-formes de réception, des chaînes, mais aussi des cas de diffusion transfrontière modifie progressivement les paysages audiovisuels nationaux. Cette évolution pose divers problèmes pour une description de synthèse européenne de l'offre de chaînes. Pour présenter une synthèse pertinente, il nous paraît important de distinguer deux approches statistiques fondamentalement différentes dans la comptabilisation du nombre de chaînes :

- une approche consiste à comptabiliser le nombre de chaînes établies dans un pays ;
- l'autre consiste à décrire les possibilités de choix des téléspectateurs.

Ces deux approches sont fondamentalement distinctes, la première se basant sur un recensement des éditeurs de services et des services qu'ils proposent, que ceux-ci s'adressent ou non au public national. Or, profitant des possibilités légales ouvertes par le cadre juridique européen (Convention européenne sur la télévision transfrontière, Directive Services de médias audiovisuels), certains États sont devenus des territoires d'accueil pour des éditeurs de services qui visent d'autres pays territoires européens, voire l'ensemble de l'Europe. A l'inverse, la description d'un marché national, et des possibilités de choix offertes aux téléspectateurs, n'aurait pas beaucoup de sens, dans plusieurs pays, si l'on ne tenait pas compte de la présence des chaînes en provenance d'autres pays, et en particulier des « chaînes étrangères dédiées ». Pour repérer les chaînes de télévision existantes, l'Observatoire se réfère dorénavant à la base de données MAVISE (http://mavise.obs.coe.int).

Le recensement est établi à partir des listes établies par les instances nationales de régulation, mais également à partir d'autres sources, en particulier le site Lyngsat (http://www.lyngsat.com) qui fournit un relevé complet et régulièrement mis à jour des services de radio et de télévision accessibles sur l'ensemble de la flotte satellitaire mondiale.

der (376). Die Zahl der High definition Simulcast-Sender ist in den 39 Mitgliedstaaten der Europäischen Audiovisuellen Informationsstelle zwischen Ende 2012 und Ende 2013 erneut kräftig gestiegen: von 709 auf 1001. Außerdem gibt es mehr als 100 Sender, die reine HD-Kanäle sind (ohne SD-Auflösung).

Systematische Erfassung der Fernsehsender

Die starke Zunahme von Empfangsplattformen, Spartenkanälen und Lokalsendern, aber auch die immer häufigere Ausstrahlung ins Ausland verändern schrittweise die audiovisuelle Medienlandschaft in den einzelnen Ländern. Diese Entwicklung birgt für die Erstellung einer europaweiten Übersicht über das Programmangebot mehrere erhebliche Schwierigkeiten. Für eine zweckmäßige Synthese ist unserer Auffassung nach zwischen zwei grundlegend unterschiedlichen statistischen Ansätzen bei der Erfassung der Anzahl der Sender zu unterscheiden:

- zum einen die Erfassung der Anzahl der in einem Land niedergelassenen Sendeveranstalter,
- zum anderen die Beschreibung der Empfangsmöglichkeiten der Zuschauer.

Diese beiden Ansätze unterscheiden sich insofern grundlegend voneinander, weil der erste auf einer Erfassung der Fernsehdienste und der von ihnen angebotenen Senderauswahl für Zuschauer im In- oder Ausland beruht. Unter Ausnutzung der durch den europäischen Rechtsrahmen geschaffenen legalen Möglichkeiten (Europäisches Übereinkommen über das grenzüberschreitende Fernsehen, Richtlinie über audiovisuelle Mediendienste) gibt es in einigen Staaten Programmanbieter, die andere europäische Länder oder gar ganz Europa anvisieren. Umgekehrt wäre die Beschreibung des Marktes eines Landes und der Auswahlmöglichkeiten der Zuschauer in vielen Ländern nicht sehr aussagekräftig, wenn nicht die Präsenz von anderen Sendern aus anderen Ländern und insbesondere die aus dem Ausland gezielt auf den heimischen Markt ausstrahlenden Dienste berücksichtigt würden. Zur Ermittlung der bestehenden Fernsehdienste stützt sich die Informationsstelle auf die Datenbank MAVISE (http://mavise.obs.coe.int).

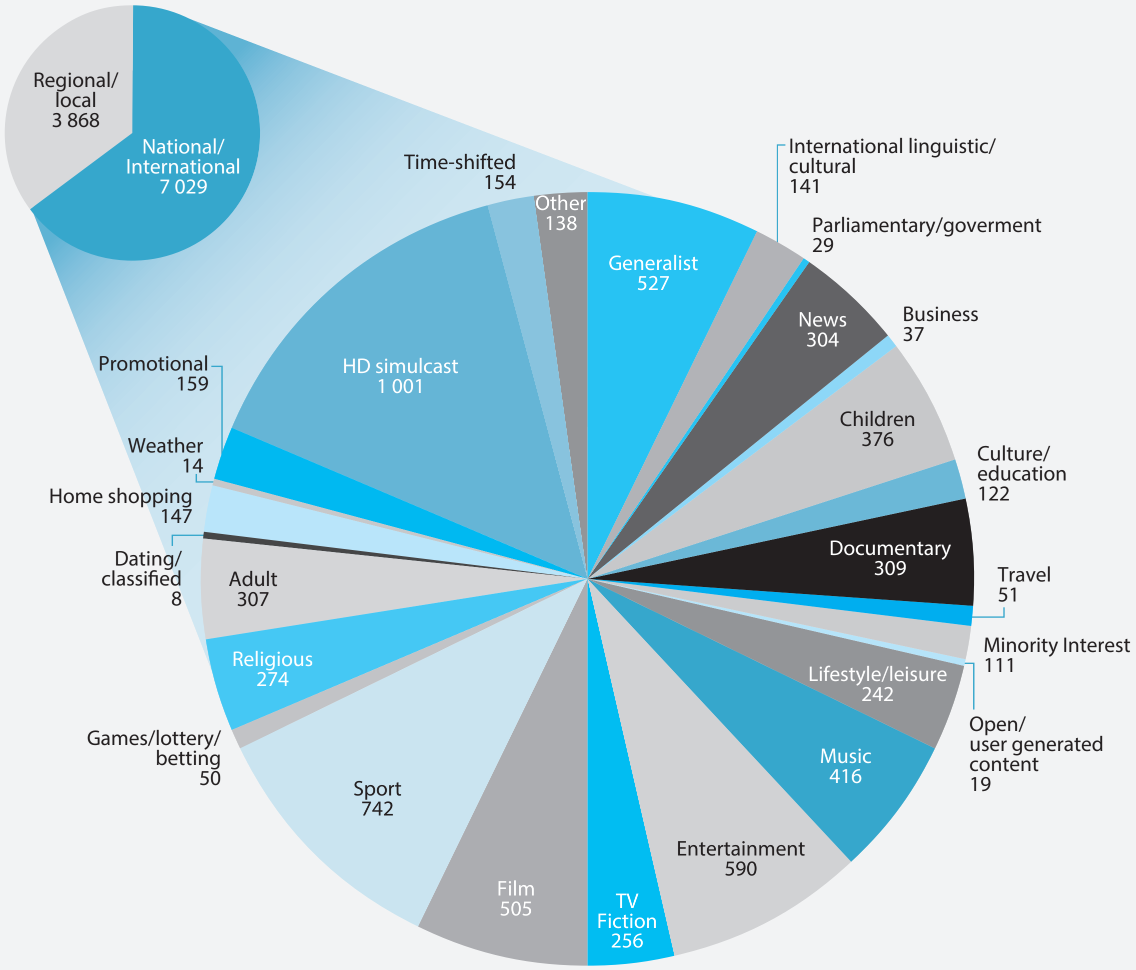
Die Erfassung erfolgt anhand von Listen der nationalen Regulierungseinrichtungen, aber auch über andere zugängliche Quellen, insbesondere die Website Lyngsat (http://www.lyngsat.com), die eine umfassende und regelmäßig aktualisierte Bestandsaufnahme der über die weltweite Satellitenflotte zugänglichen Hörfunk und Fernsehdiente bereitstellt.

➥ European Audiovisual Observatory

G.4.1

TV channels by genre available in 37 member states of the European Audiovisual Observatory

December 2013 In units. This graph includes extra European channels available in Europe.



December 2013 In units.

The 37 countries are the 28 countries of the European Union, Albania, Bosnia and Herzegovina, Switzerland, Iceland, Liechtenstein, Montenegro, Norway, "The former Yugoslav Republic of Macedonia" and Turkey. The Russian Federation and Armenia were not included as the total census in the MAVISE database does not include all the channels available in these countries.

European Audiovisual Observatory / MAVISE database

T.4.1 TV channels by kind of transmission, available and established in the European countries

December 2013 In units.

Country	Nationwide channels (with terrestrial licences)		Other nationwide channels (cable, satellite, IPTV, mobile)		Regional or territorial channels	
	Public	Private	Public	Private	Public	Private
AL	1	2	6	93	0	0
AM	1	6	0	3	0	0
AT	3	6	4	54	0	7
BA	4	2	1	24	0	25
BE (CFR)	6	0	1	25	11	0
BE (DSG)	1	0	0	1	0	0
BE (VLG)	4	1	3	54	0	10
BE (1)	0	0	0	0	0	0
BG	4	9	0	106	0	60
CH	9	0	7	31	0	14
CY	3	13	0	13	0	0
CZ	7	18	1	53	0	78
DE	15	23	20	321	13	42
DK	18	2	0	20	0	2
EE	4	6	1	2	0	0
ES	6	27	11	165	39	40
FI	6	28	0	22	0	4
FR	10	30	6	246	9	73
GB	30	62	0	406	1	19
GR	2	8	1	56	0	44
HR	5	7	1	43	0	0
HU	8	8	0	31	0	0
IE	8	2	4	3	0	1
IS	3	22	0	6	0	0
IT	14	91	9	255	0	224
LI	0	1	0	2	0	0
LT	2	12	1	3	0	0
LU	0	4	1	16	0	0
LV	2	9	0	21	0	7
ME	2	1	1	15	3	4
MK	3	7	2	35	0	34
MT	2	12	1	20	0	0
NL	3	11	19	113	15	1
NO	4	23	5	26	0	0
PL	10	14	5	89	0	1
PT	2	2	5	70	2	0
RO	3	12	2	127	0	318
RU (2)	8	7	52	189	0	0
SE	7	23	0	62	0	6
SI	3	4	2	43	3	7
SK	3	10	1	30	0	60
TR	10	25	6	248	0	16
EUR 28	**191**	**454**	**99**	**2 470**	**93**	**1 004**
EUR 39	**236**	**550**	**179**	**3 142**	**96**	**1 097**

(1) 46 of the channels counted for Belgium (Federal) are in reality the 23 versions of EbS and of EbS+, the European Commission TV services.
(2) Estimation.

Supply of TV channels

L'offre des chaînes

Fernsehangebot

Local stations and open channels (terr. or cable)	Windows	Channels targeting foreign countries	Total channels established in a country (windows not included)	Channels available in the country	
				Total	Foreign
0	0	1	103	121	19
32	0	0	42	54	12
124	10	7	205	601	403
18	0	1	75	332	258
0	0	0	43	482	439
0	0	0	2	439	437
0	0	0	72	567	495
0	0	47	47	15	15
12	0	8	199	460	269
0	0	6	67	222	161
1	0	7	37	196	166
43	0	109	309	413	213
147	59	49	630	827	246
200	37	3	245	503	261
4	0	0	17	346	329
557	26	39	884	995	150
39	0	1	100	327	228
100	24	215	689	902	427
26	43	1 017	1 561	591	47
91	0	10	212	303	101
42	20	3	101	404	306
510	6	4	561	778	221
3	0	0	21	480	459
0	0	0	31	48	17
500	20	61	656	738	143
0	0	1	4	15	12
43	0	0	61	370	309
10	0	40	71	519	488
16	0	5	60	294	239
1	0	0	27	288	261
2	0	0	83	354	271
0	0	10	45	183	148
232	23	99	493	716	321
28	14	1	87	232	146
219	16	3	341	760	422
0	0	11	92	307	226
0	5	81	543	606	144
0	0	8	1 764	375	119
76	29	160	334	350	176
25	0	0	87	456	369
6	0	0	110	302	192
214	0	5	524	667	148
3 026	**318**	**1 989**	**8 828**		
4 821	**332**	**2 012**	**11 635**		

➥ European Audiovisual Observatory / MAVISE database

T.4.2 TV channels by genre and by country, available in the EU28 and Turkey

December 2013 In units. This table includes extra-European channels available in Europe.

	AT	BE (CFB)	BE (DSG)	BE (VLG)	BG	CY	CZ	DE	DK	EE	ES	FI	FR	GB
Adult	30	9	7	14	23	8	9	60	6	9	32	12	71	36
Business	2	5	4	6	5	2	2	3	2	3	4	2	6	3
Children	20	43	41	51	19	13	20	30	13	32	29	14	37	24
Film	15	23	21	21	16	9	21	19	24	27	19	33	53	32
Culture/Education	10	6	6	12	9	0	6	18	12	7	8	7	27	7
Dating	0	0	0	0	0	0	0	1	0	0	0	0	0	4
Documentary	12	26	25	23	16	11	22	17	18	38	16	20	21	15
Entertainment	27	26	21	25	28	6	21	33	21	35	14	21	63	49
Fiction	10	12	12	13	12	3	12	13	4	13	20	3	14	15
Games	4	5	3	3	2	1	2	1	2	1	2	3	9	7
Generalist	49	37	36	43	39	14	33	51	40	25	18	21	74	13
HD simulcast	114	47	42	58	43	26	48	137	49	20	44	43	95	79
Home shopping	10	5	5	13	5	0	1	32	0	1	3	0	8	35
News	21	34	32	33	31	26	21	36	18	22	21	20	62	28
International culture & linguistic	16	14	13	25	15	5	6	26	14	10	23	6	43	3
Lifestyle	11	23	16	20	15	6	7	17	3	9	18	3	34	14
Local	128	23	23	25	72	4	87	162	225	4	564	43	190	7
Minorities	4	8	5	8	2	0	0	13	6	0	3	0	24	20
Music	23	39	35	43	53	16	22	34	18	23	28	12	85	40
Parliamentary	0	1	1	1	1	1	0	5	1	0	2	0	2	2
Promotional	10	10	8	9	5	2	27	3	7	0	5	3	8	3
Religion	2	3	2	10	2	1	2	13	6	3	44	4	25	30
Sport	50	47	42	48	24	34	26	63	30	35	38	29	73	28
Travel	1	10	10	9	7	2	4	1	2	8	4	3	8	2
Time-shifted versions	2	5	5	5	1	0	0	4	0	0	15	0	11	62
User generated content	0	0	1	0	0	0	0	0	0	0	0	0	1	0
Weather	0	0	0	0	0	0	1	1	0	0	3	0	2	1
Windows	25	9	9	36	0	0	12	48	0	0	26	0	31	54
Others	8	4	4	5	7	0	1	10	2	4	4	6	14	6
Total (windows included)	**604**	**474**	**429**	**559**	**452**	**190**	**413**	**851**	**523**	**329**	**1007**	**308**	**1 091**	**619**

No data here for Albania, Bosnia and Herzegovina, Iceland, Liechtenstein, Montenegro, Norway, the Russian Federation, Switzerland and 'The former Yugoslav Republic of Macedonia'
Free to air channels on satellite have been counted only in their country of establishment, even if they are, in practice, available in most European countries.

GR	HR	HU	IE	IT	LT	LU	LV	MT	NL	PL	PT	RO	SK	SI	SE	TR
6	12	11	29	18	2	15	10	0	17	10	15	8	7	17	6	2
2	3	1	2	7	3	5	3	2	2	6	3	2	2	4	3	2
7	25	16	25	31	36	29	21	12	34	41	20	12	13	26	10	23
9	13	18	28	38	22	13	30	7	13	27	17	21	10	19	25	37
0	15	8	7	11	10	15	2	2	13	11	2	7	7	12	8	3
0	0	0	0	0	0	0	0	0	0	1	0	0	0	0	0	1
9	16	20	15	18	39	19	27	11	12	40	15	19	16	16	17	15
6	41	20	41	21	32	37	26	8	29	34	9	20	15	42	21	33
3	13	10	16	20	10	10	10	2	14	22	14	10	10	14	3	14
2	2	1	4	11	1	7	2	1	1	5	2	2	1	1	2	0
11	44	29	13	31	25	53	20	20	43	35	18	20	33	55	30	66
28	34	28	55	60	16	65	13	14	71	76	42	32	32	62	34	80
1	1	1	23	29	0	10	0	3	1	2	0	0	1	2	0	11
22	22	22	27	36	21	51	20	9	36	32	21	24	19	18	15	35
5	10	4	3	14	9	22	5	4	19	18	17	5	5	12	12	7
7	10	16	12	23	15	18	5	18	13	25	15	12	8	13	3	11
139	27	505	5	692	41	29	24	0	252	229	3	323	69	54	58	228
0	0	0	17	3	0	6	0	0	7	10	5	1	0	0	2	3
13	38	27	32	24	22	22	19	17	35	27	19	25	18	35	12	33
1	2	1	2	3	1	4	0	0	6	2	1	0	0	2	0	1
1	3	0	1	4	3	6	0	0	12	7	5	9	3	4	10	5
2	3	2	27	11	4	8	2	4	13	29	6	5	2	4	5	7
21	34	22	26	78	33	54	29	34	29	49	41	19	19	31	39	30
2	2	1	2	3	7	2	4	3	2	4	3	3	3	3	2	3
0	2	0	53	39	0	4	4	2	0	0	0	0	0	0	0	0
0	0	0	0	0	0	1	0	0	0	0	0	0	0	0	14	1
0	0	0	0	2	0	0	0	1	2	1	0	0	0	0	0	0
0	22	6	1	21	0	20	0	0	39	17	0	10	0	1	29	1
0	3	1	4	8	1	5	2	1	8	12	7	15	1	7	2	9
297	**397**	**770**	**470**	**1 256**	**353**	**530**	**278**	**175**	**723**	**772**	**300**	**604**	**294**	**454**	**362**	**661**

European Audiovisual Observatory / MAVISE database

CHAPTER
CHAPITRE
KAPITEL
5

TV audience

L'audience de la télévision

Fernseh-nutzung

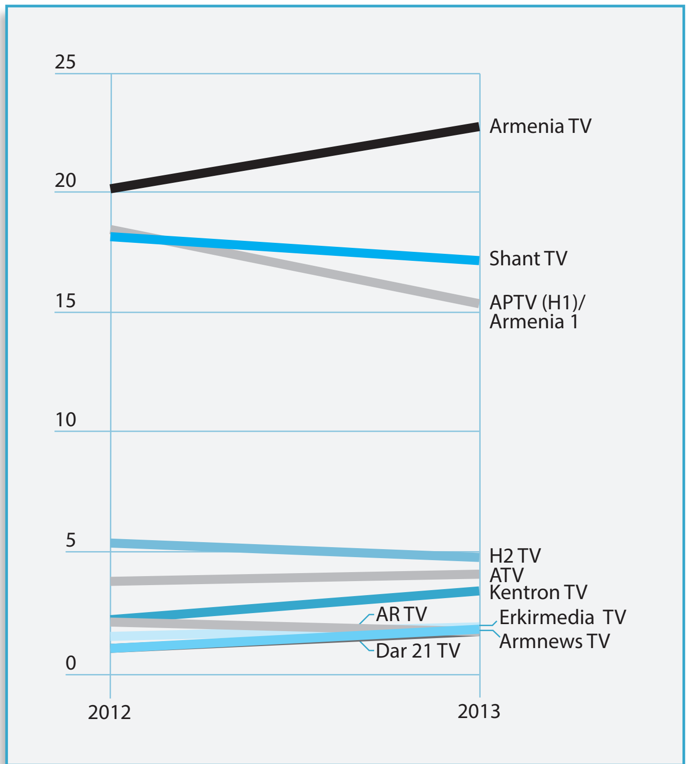
T.5.1
G.5.1

TV audience market share in Armenia
2012-2013 In %, 4 years +.

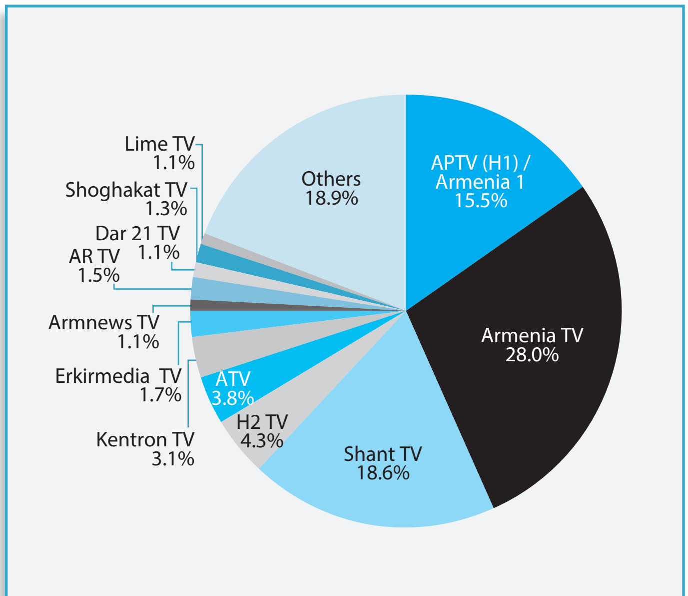
Channels	Daily share 2012	Daily share 2013	Prime time (18:00 - 24:00) 2012	Prime time (18:00 - 24:00) 2013
APTV (H1) / Armenia 1	18.6	15.5	20.5	15.5
Total public service	**18.6**	**15.5**	**20.5**	**15.5**
Armenia TV	20.3	22.9	20.8	28.0
Shant TV	18.3	17.3	21.0	18.6
H2 TV	5.5	4.9	4.6	4.3
ATV	3.9	4.2	3.7	3.8
Kentron TV	2.3	3.5	1.9	3.1
Erkirmedia TV	1.6	2.0	1.6	1.7
Armnews TV	1.1	1.9	0.9	1.1
AR TV	2.2	1.8	1.8	1.5
Dar 21 TV	1.1	1.8	0.7	1.1
Shoghakat TV (1)	~	1.7	~	1.3
Lime TV	1.2	1.5	0.9	1.1
Yerevan TV	0.9	0.9	0.7	0.9
Total private Armenian TV	**58.2**	**64.4**	**58.4**	**66.5**
Mir TV (RU) (1)	~	0.6	~	0.4
Others	**23.2**	**19.5**	**21.1**	**17.6**

(1) Measured since 01/04/2013.

➡ Eurodata TV Worldwide, TV MR AM / AGB Nielsen Media Research



2012-2013 Daily share. In %, 4 years +.



2013 Prime time (18:00-24:00). In %, 4 years +.

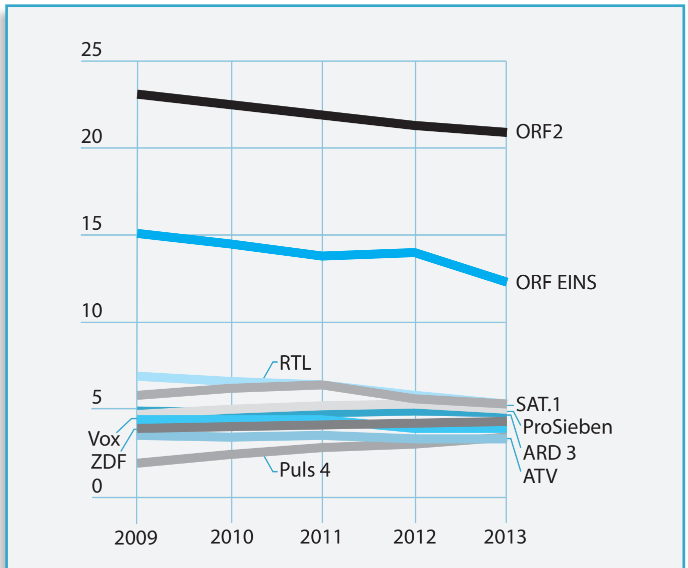
T.5.2 G.5.2 TV audience market share in Austria

2009-2013 In %, 3 years +.

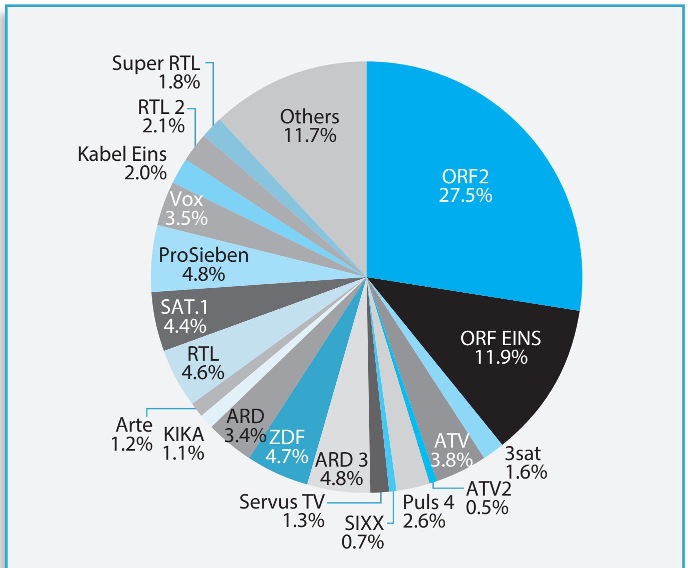
Channels	Daily share 2009	2010	2011	2012	2013	Prime time (18:00-23:00) ❸ 2009	2010	2011	2012	2013
ORF2	23.1	22.5	21.9	21.3	20.9	28.3	27.5	27.3	26.4	27.5
ORF EINS	15.1	14.5	13.8	14.0	12.3	14.7	14.4	13.4	14.2	11.9
3sat	1.9	1.8	1.8	1.6	1.7	1.8	1.8	1.8	1.5	1.6
Austrian public channels	**40.1**	**38.8**	**37.5**	**36.9**	**34.9**	**44.8**	**43.7**	**42.5**	**42.1**	**41.0**
ATV	3.5	3.4	3.5	3.3	3.3	4.2	4.2	4.1	3.8	3.8
ATV2	–	–	–	0.3	0.5	–	–	–	0.3	0.5
Puls 4	1.9	2.4	2.8	3.0	3.4	1.7	2.2	2.6	2.4	2.6
SIXX ❶	0.6	0.4	0.4	0.5	0.9	0.7	0.6	0.5	0.4	0.7
Servus TV	–	0.3	0.7	1.2	1.5	–	0.3	0.7	1.2	1.3
gotv		–	–	0.1	0.1	–	–	–	0.1	0.0
Austrian private channels	**6.0**	**6.5**	**7.4**	**8.4**	**9.7**	**6.6**	**7.3**	**7.9**	**8.2**	**8.9**
ARD 3	4.9	4.8	4.8	4.9	4.8	4.8	4.8	4.9	4.8	4.8
ZDF	3.9	4.0	4.1	4.2	4.3	4.2	4.3	4.5	4.6	4.7
ARD	3.3	3.4	3.1	3.1	3.2	3.6	3.7	3.4	3.2	3.4
KIKA	1.0	1.0	1.0	1.0	1.0	0.9	0.9	0.9	0.9	1.1
Arte	1.0	0.9	1.0	0.9	1.0	1.2	1.2	1.2	1.0	1.2
Foreign public channels	**14.1**	**14.1**	**14.0**	**14.1**	**14.3**	**14.7**	**14.9**	**14.9**	**14.5**	**15.2**
RTL	5.8	6.2	6.4	5.6	5.3	5.3	5.4	5.5	4.9	4.6
SAT.1	6.9	6.6	6.4	5.8	5.3	4.6	4.4	4.5	4.3	4.4
ProSieben	4.7	5.0	5.2	5.3	5.0	4.5	5.0	5.0	5.0	4.8
Vox	4.4	4.4	4.4	3.9	3.9	4.2	4.3	4.4	3.8	3.5
Kabel Eins	2.8	2.8	2.7	2.6	2.5	2.4	2.3	2.4	2.4	2.0
RTL 2	2.4	2.3	2.2	2.3	2.4	2.1	2.0	1.9	2.2	2.1
Super RTL	2.8	2.6	2.1	2.1	1.9	2.6	2.3	1.9	1.7	1.8
Nick / Comedy Central Austria	–	–	0.9	0.6	0.7	–	–	0.6	0.4	0.5
Eurosport	0.7	0.6	0.6	0.7	0.6	0.5	0.4	0.4	0.4	0.4
DSF / Sport 1	0.5	0.5	0.5	0.4	0.5	0.5	0.4	0.4	0.3	0.3
Viva Austria	–	–	0.2	0.2	0.1			0.2	0.1	0.1
Nick / Viva Austria ❷	–	0.8	–	0.2	~	–	0.5	–	0.1	~
MTV Austria ❷	–	0.3	–	–	~	–	0.2	–	–	~
Foreign private channels	**31.0**	**32.1**	**31.6**	**29.7**	**28.2**	**26.7**	**27.2**	**27.2**	**25.6**	**24.5**
Others	**8.8**	**8.5**	**9.5**	**10.9**	**12.9**	**7.2**	**6.9**	**7.5**	**9.6**	**10.4**

❶ AUSTRIA 9 ceased broadcasting and was replaced by a women's channel named SIXX. SIXX started broadcasting on 03/07/2012. Market shares refer to the whole year 2012.
❷ On 01/01/2011 VIVA Austria took over the frequency of MTV Austria which moved into pay TV. VIVA Austria previously shared its frequency with NICKELODEON.
❸ Prime time definition changed to 18:00-22:00 starting from 2013.

➥ Eurodata TV Worldwide / AGTT / GfK Teletest



2009-2013 Daily share. In %, 3 years +.



2013 Prime time (18:00-22:00). In %, 3 years +.

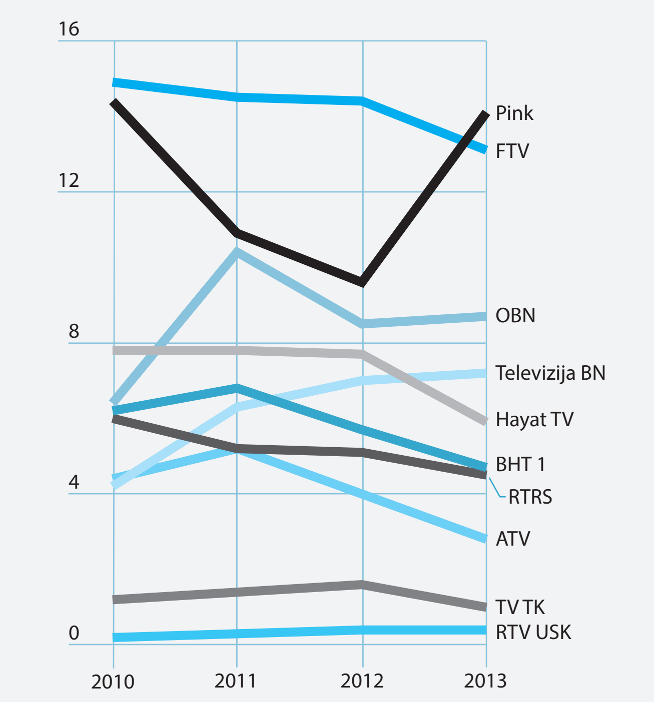
T.5.3 G.5.3 TV audience market share in Bosnia and Herzegovina

2009-2013 In %, 4 years +.

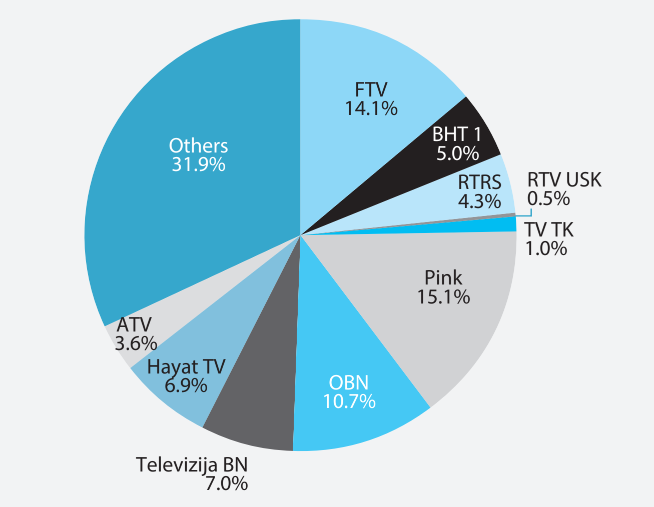
Channels	Daily share 2010	2011	2012	2013	Prime time (19:00-23:00) 2010	2011	2012	2013
FTV	14.9	14.5	14.4	13.1	16.9	17.1	18.2	14.1
BHT 1	6.2	6.8	5.7	4.7	6.9	8.5	6.2	5.0
RTRS	6.0	5.2	5.1	4.5	5.9	5.1	4.8	4.3
RTV USK	0.2	0.3	0.4	0.4	0.3	0.4	0.5	0.5
TV TK	1.2	1.4	1.6	1.0	1.2	1.4	1.4	1.0
TV ZENICA	0.4	0.3	0.3	0.1	0.4	0.3	0.3	0.2
Total public channels	**28.9**	**28.5**	**27.4**	**23.8**	**31.6**	**32.8**	**31.3**	**25.0**
Pink	14.4	10.9	9.6	14.1	14.0	10.7	8.9	15.1
OBN	6.4	10.4	8.5	8.7	5.6	9.4	9.2	10.7
Televizija BN	4.2	6.3	7.0	7.2	4.0	6.1	7.0	7.0
Hayat TV	7.8	7.8	7.7	5.9	8.9	8.4	9.2	6.9
ATV	4.4	5.2	4.0	2.8	5.6	6.5	5.2	3.6
TV1		0.5	0.9	0.9		0.6	1.0	1.0
Kanal 3		0.7	0.8	0.9		0.5	0.6	0.7
BN Music		0.5	0.6	0.5		0.3	0.3	0.2
FACE TV			0.1	0.3			0.0	0.4
Main private channels	**37.2**	**42.3**	**39.3**	**41.2**	**38.1**	**42.5**	**41.3**	**45.6**
Others	**33.9**	**29.2**	**33.2**	**34.9**	**30.3**	**24.7**	**27.3**	**29.4**

Note: audience data are not on hand for all the channels available in the country.

➥ Eurodata TV Worldwide / Mareco Index Bosnia



2010-2013 Daily share. In %, 4 years +.



2013 Prime time (19:00-23:00). In %, 4 years +.

T.5.4
G.5.4

TV audience market share in the French Community of Belgium (CFB)

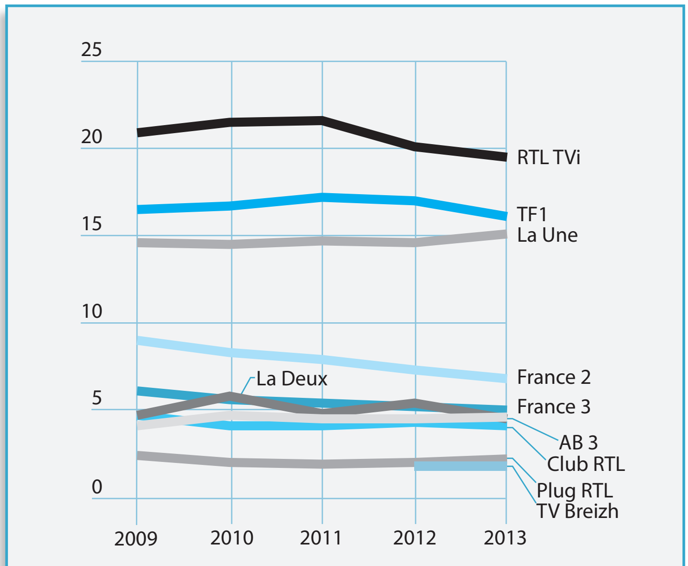
2009-2013 In %, 4 years + guests, Live+6.

Channels	Daily share					Prime time (18:55-22:30) [5]				
	2009	2010	2011	2012	2013	2009	2010	2011	2012	2013
La Une	14.6	14.5	14.7	14.6	15.1	17.3	17.1	17.0	17.5	17.5
La Deux	4.7	5.8	4.8	5.4	4.5	5.4	6.2	5.3	6.2	5.2
La Trois [1]	–	0.9	1.0	0.9	1.3	–	0.6	0.7	0.8	1.0
Public channels of the CFB	**19.3**	**21.2**	**20.5**	**20.9**	**~**	**22.7**	**23.9**	**23.0**	**24.5**	**23.7**
AB 3	4.1	4.7	4.5	4.5	4.6	3.1	3.6	3.6	3.6	3.8
Be1	0.3	0.3	0.3	0.4	0.4	0.5	0.4	0.5	0.6	0.4
AB 4 [2]	1.0	0.9	0.6	~	~	1.1	1.0	~	~	~
MTV - MTV (FR)	1.8	0.0	0.1	~	~	0.6	0.0	0.1	~	~
Private channels of the CFB	**5.4**	**5.9**	**5.5**	**4.9**	**5.0**	**5.3**	**5.0**	**4.2**	**4.2**	**4.2**
RTL TVi	20.9	21.5	21.6	20.1	19.5	28.1	28.8	29.1	28.0	26.7
TF1	16.5	16.7	17.2	17.0	16.1	12.6	12.9	12.9	11.9	12.2
France 2	9.0	8.3	7.9	7.3	6.8	6.8	6.7	6.6	6.4	6.3
France 3	6.1	5.6	5.4	5.2	5.0	5.2	4.8	4.8	4.5	4.4
Club RTL	4.7	4.1	4.1	4.3	4.1	6.7	5.5	5.6	5.8	6.2
Plug RTL	2.4	2.0	1.9	2.0	2.2	2.7	2.1	2.1	2.3	2.6
TV Breizh				1.6	1.8				0.9	1.1
Nickelodeon / MTV [3]	1.8	1.4	1.4	1.7	1.5	0.6	0.4	0.4	0.6	0.5
ARTE				1.3	1.4				1.5	1.6
France 5				1.3	1.3				0.6	0.8
Disney Channel (French version)				0.9	0.9				0.5	0.5
TV5 Monde	1.5	1.0	0.9	~	~	0.7	0.8	0.7	~	~
Foreign channels	**62.9**	**60.6**	**60.4**	**62.7**	**60.7**	**63.4**	**62.0**	**62.2**	**63.0**	**62.8**
Één (VRT)	0.6	0.6	0.6	~	~	~	0.5	0.4	~	~
Ketnet / Canvas [4]	0.2	0.2	0.2	–	~	~	0.2	0.2	–	~
VTM	0.1	0.2	0.1	~	~	~	0.2	0.1	~	~
VIER (former VT4)	0.1	0.1	0.1	~	~	~	0.1	0.1	~	~
2BE	0.1	0.1	0.1	~	~	~	0.1	0.1	~	~
Vitaya	0.0	0.0	0.1	~	~	~	0.0	0.0	~	~
Flemish channels	**1.1**	**1.2**	**1.2**	**~**	**~**	**0.0**	**1.1**	**0.9**	**~**	**~**
Others	**11.3**	**11.1**	**12.4**	**11.5**	**13.3**	**8.6**	**8.0**	**9.7**	**8.3**	**9.3**

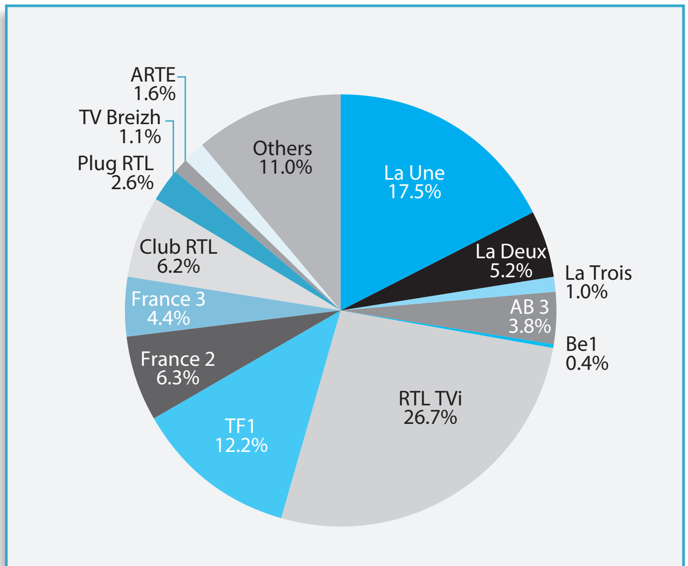
Market shares from 01/01/2006 are calculated over Total TV without taking into account external devices such as DVD, VCR, …

1. Measured only since 01/09/2010. Data are for the period 01/09/2010 - 31/12/2010. The data related to La Trois for 2013 were provided by EBU-M.I.S.
2. Reported until 30/04/2011.
3. Version in French. Since 2011, based on Nickelodeon only.
4. Ketnet/Canvas split into two channels: CANVAS and OP12 (which replaced KETNET) on 01/05/2012.
5. Prime time definition changed to 19:00-23:00 starting from 2013.

➡ EurodataTV Wrldwide / CIM-GfK Audimétrie



2009-2013 Daily share. In %, 4 years +.



2013 Prime time (19:00-23:00). In %, 4 years +.

T.5.5 G.5.5

TV audience market share in the Flemish Community of Belgium (VLG)

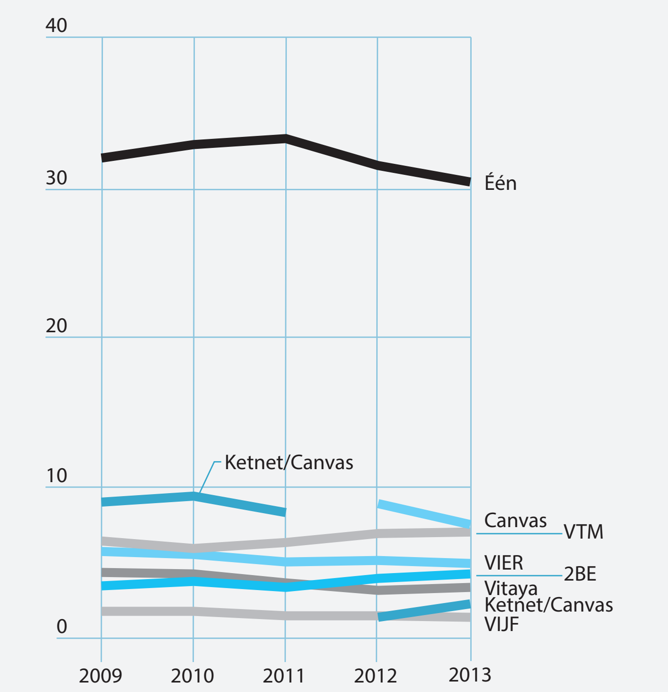
2009-2013 In %, 4 years +.

Channels	Daily share 2009	2010	2011	2012	2013	Prime time (18:55-22:30) ❶ 2009	2010	2011	2012	2013
Één	32.1	33.0	33.4	31.6	30.5	35.0	36.0	36.7	35.5	33.5
Ketnet/Canvas ❷	9.1	9.5	8.4	–	–	8.2	8.7	8.0	–	–
Canvas				9.0	7.6				8.9	7.8
Op 12				1.4	2.3				0.6	1.1
Flemish public channels	**41.2**	**42.5**	**41.8**	**42.0**	**40.3**	**43.2**	**44.7**	**44.7**	**45.0**	**42.4**
VTM	20.9	20.4	20.2	18.6	17.8	26.3	25.6	24.9	23.0	21.7
VIER (formerly VT4)	6.0	6.4	7.0	7.1	7.4	6.6	7.6	7.6	8.3	9.0
2BE (formerly Kanaal 2)	5.6	5.1	5.2	5.0	5.1	6.4	5.5	5.9	6.1	6.8
Vitaya	3.8	3.4	4.0	4.3	5.0	1.9	1.6	1.9	2.3	3.0
VIJF (formerly Vijf TV)	4.3	3.7	3.2	3.4	3.7	3.8	3.0	2.9	3.3	3.7
VTMKZoom	–	–	1.0	0.9	0.8	–	–	0.3	0.3	0.2
Acht TV				0.5	0.6				0.3	0.4
Njam!				0.5	0.4				0.3	0.2
Regional TV	~	1.2	~	~	~	~	0.9	~	~	~
Flemish private channels	**40.6**	**40.2**	**40.6**	**40.3**	**40.8**	**45.0**	**44.2**	**43.5**	**43.9**	**45.1**
La Une	~	0.3	0.4	~	~	~	0.3	0.3	~	~
La Deux	~	0.2	0.2	~	~	~	0.2	0.1	~	~
AB3	~	~	0.2	~	~	~	~	0.1	~	~
Channels of the CFB	**~**	**0.5**	**0.9**	**~**	**~**	**~**	**0.5**	**0.6**	**~**	**~**
Ned 1	1.8	1.5	1.5	1.4	~	~	1.5	1.6	1.3	~
Nickelodeon/MTV (NL)	1.5	1.1	~	1.2	1.1	0.5	0.4	~	0.5	0.5
Discovery Channel (VL)				0.9	1.3				0.4	0.7
Disney Channel (VL)				0.8	0.8				0.4	0.4
National Geographic				0.7	0.8				0.4	0.5
Nick Jr				0.5	0.7				0.3	0.3
Cartoon Network (NL)				0.2	0.2				0.1	0.1
Foreign channels	**3.3**	**4.1**	**2.5**	**5.8**	**4.9**	**0.5**	**3.8**	**2.2**	**3.4**	**2.5**
Others	**14.9**	**12.7**	**14.2**	**11.9**	**14.0**	**11.3**	**6.8**	**9.0**	**7.7**	**10.0**

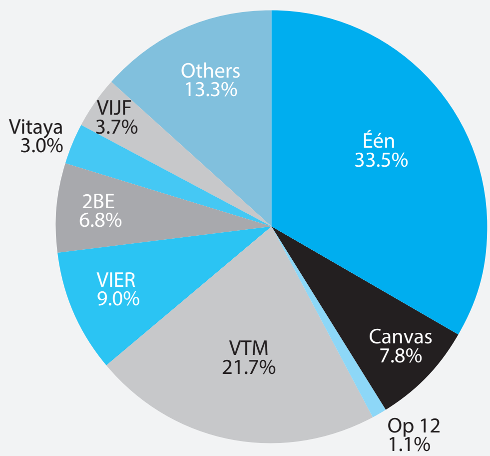
❶ Prime time definition changed to 19:00 - 23:00 starting from 2013.

❷ KETNET/CANVAS split into two channels: CANVAS and OP12 (which replaced KETNET) on 01/05/2012.

➡ Eurodata TV Worldwide / CIM - GfK Audimetrie



2009-2013 Daily share. In %, 4 years +.



2013 Prime time (19:00-23:00). In %, 4 years +.

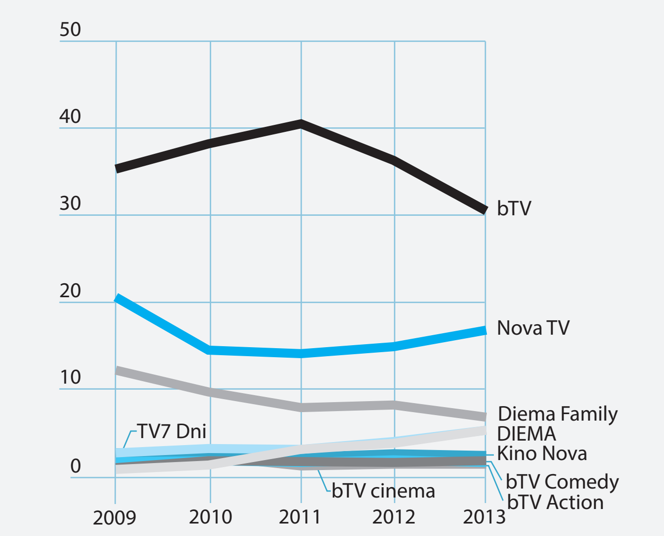
T.5.6 G.5.6 TV audience market share in Bulgaria

2009-2013 In %, 4 years +.

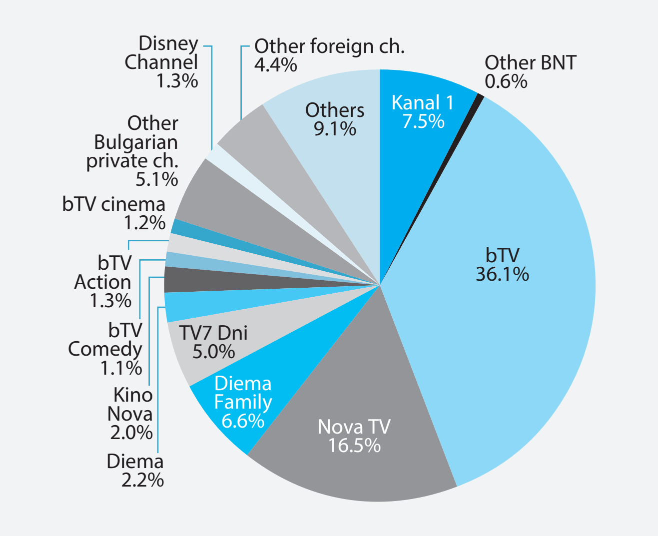
Channels	Daily share 2009	Daily share 2010	Daily share Sep.-Dec. 2011	Daily share 2012	Daily share 2013	Prime time (20:00-22:30) 2009	Prime time 2010	Prime time Sep.-Dec. 2011	Prime time 2012	Prime time 2013 ❶
Kanal 1 (BNT 1)	12.2	9.7	7.9	8.2	6.8	14.6	10.9	9.7	10.9	7.5
BNT World (formerly BNT Sat)	0.6	0.6	0.5	0.2	0.3	0.6	0.6	0.5	0.2	0.3
BNT 2				0.1	0.3				0.1	0.3
Bulgarian public channels	**12.8**	**10.3**	**8.4**	**8.5**	**7.4**	**15.2**	**11.5**	**10.2**	**11.2**	**8.1**
bTV	35.3	38.2	40.5	36.3	30.5	39.2	44.2	47.0	41.0	36.1
Nova TV	20.6	14.5	14.1	14.9	16.8	19.8	14.5	12.9	13.4	16.5
Diema Family	2.7	3.2	3.1	4.0	5.3	2.7	2.7	3.1	4.5	6.6
TV7 Dni	0.8	1.3	3.1	3.8	5.3	0.7	1.1	2.1	3.6	5.0
DIEMA (ex Diema+)	2.7	2.8	2.2	2.6	2.4	2.7	2.4	1.9	2.4	2.2
Kino Nova (formerly Diema 2)	1.0	1.8	1.7	1.6	1.8	0.7	2.2	2.1	2.0	2.0
bTV Comedy (formerly GTV Gotinata Televizija)	1.7	1.8	1.6	1.9	1.6	1.3	1.4	1.2	1.4	1.1
bTV Action (formerly Pro.BG TV)	2.0	2.3	1.2	1.4	1.4	2.2	2.6	1.2	1.2	1.3
bTV cinema	–	1.1	0.9	1.0	1.2	–	1.2	1.0	1.0	1.2
TV Evropa	0.9	1.2	1.0	1.0	1.1	0.5	0.6	0.4	0.6	0.6
NEWS 7 (ex BBT Balkan Bulgarian TV)	0.5	0.3	0.4	0.4	1.0	0.4	0.2	0.2	0.3	0.9
Planeta TV	1.2	1.2	0.9	0.8	0.8	0.7	0.8	0.5	0.5	0.5
Super 7	–	0.6	0.8	0.8	0.8	–	0.2	0.3	0.4	0.4
BTV Lady				0.3	0.5				0.2	0.4
Kanal 3	0.4	0.4	0.7	0.4	0.5	0.4	0.4	0.7	0.5	0.5
Folklor TV	0.7	0.7	0.5	0.5	0.4	0.6	0.6	0.4	0.5	0.4
24 Kitchen				0.1	0.3				0.1	0.2
RING.BG (ex Ring TV)	0.9	0.8	0.2	0.2	0.3	0.8	0.7	0.2	0.2	0.2
Bulgarian private channels	**74.0**	**73.7**	**75.3**	**73.0**	**73.0**	**74.8**	**77.3**	**77.6**	**74.7**	**77.0**
Disney Channel	1.8	1.8	2.0	2.1	2.0	1.1	0.9	1.2	1.2	1.3
Fox Life Bulgaria	1.1	1.1	1.1	1.0	1.0	0.5	0.7	0.7	0.7	0.7
National Geographic Channel Europe	0.6	0.8	1.0	1.0	0.9	0.4	0.5	0.7	0.6	0.5
Fox Crime (version in Bulgarian)	0.5	0.8	0.8	1.0	1.1	0.2	0.4	0.6	0.8	0.7
Cartoon Network	0.4	0.9	0.8	1.0	0.8	0.2	0.5	0.6	0.7	0.7
Discovery Channel	0.2	0.5	0.7	0.6	0.7	0.1	0.3	0.5	0.4	0.5
AXN (version in Bulgarian)	0.4	0.4	0.3	0.4	0.4	0.4	0.4	0.2	0.3	0.4
Fox (version in Bulgarian)					0.4					0.3
Foreign channels	**6.7**	**7.1**	**8.0**	**7.7**	**8.1**	**4.1**	**4.3**	**5.4**	**5.2**	**5.7**
Others	**6.5**	**8.9**	**8.3**	**10.8**	**11.5**	**5.9**	**6.9**	**6.8**	**8.9**	**9.2**

❶ Prime time definition changed to 19:00-23:00 starting from 2013.

➡ Eurodata TV Worldwide / TNS TV Plan > 2010; GARB Audience Research Bulgaria starting 2011 (a new peoplemetric panel has been launched on 01/09/2011



2009-2013 Daily share. In %, 4 years +.



2013 Prime time (19:00-23:00). In %, 4 years +.

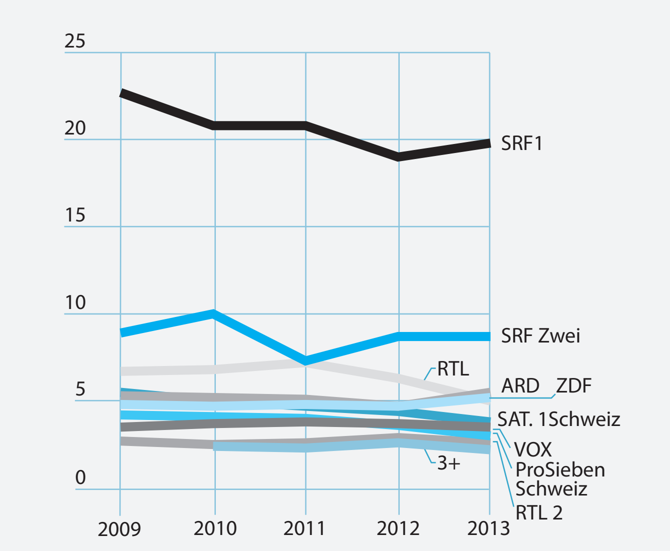
T.5.7
G.5.7

TV audience market share in German-speaking Switzerland

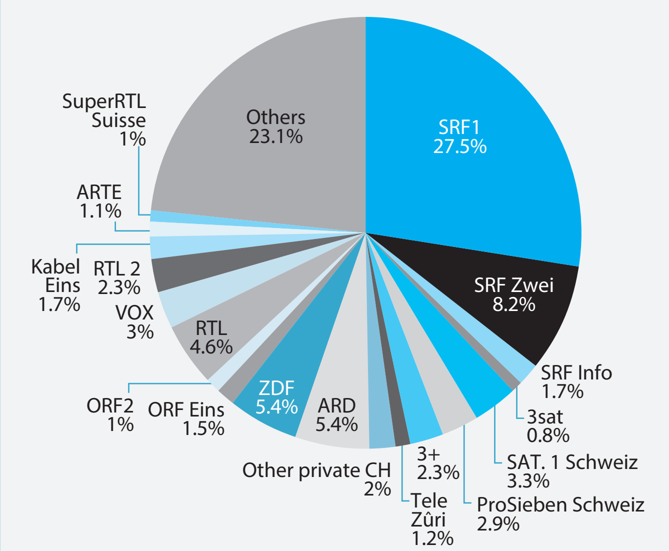
2009-2013 In %, 3 years +.

Channels	Daily share 2009	2010	2011	2012	2013	Prime time (18:00-23:00) 2009	2010	2011	2012	2013
SRF1 (ex SF1)	22.7	20.8	20.8	19.0	19.8	31.0	28.5	28.8	26.9	27.5
SRF Zwei (ex SF2)	8.9	10.0	7.3	8.7	8.7	8.8	10.7	7.5	9.2	8.2
SRF Info (ex SF INFO)	1.6	1.7	1.8	1.6	2.0	1.3	1.4	1.5	1.3	1.7
3sat	1.2	1.1	1.1	1.3	0.9	1.1	1.0	1.0	1.1	0.8
RTS Un	0.3	0.3	0.3	0.3	0.3	0.4	0.3	0.4	0.3	0.3
Swiss public channels	**34.8**	**34.0**	**31.6**	**31.3**	**32.0**	**42.7**	**42.0**	**39.5**	**39.1**	**38.8**
SAT. 1 Schweiz	5.5	5.0	4.7	4.4	3.8	3.7	3.5	3.3	3.1	3.3
ProSieben Schweiz	4.2	4.1	4.0	3.6	3.0	3.8	3.8	3.8	3.4	2.9
3+	–	2.4	2.3	2.6	2.2	–	2.5	2.4	2.8	2.3
Tele Zûri					1.0					1.2
Nick CH	–	–	1.0	1.0	0.6	–	–	0.5	0.5	0.3
4+					0.6					0.7
TeleBarn					0.3					0.3
Swiss private channels	**11.6**	**13.3**	**12.3**	**11.9**	**12.2**	**9.5**	**11.7**	**10.2**	**10.0**	**11.7**
ARD	5.3	5.2	5.1	4.7	5.5	5.6	5.5	5.3	4.8	5.4
ZDF	4.8	4.7	4.8	4.7	5.2	4.8	4.7	5.1	5.0	5.4
ORF Eins	2.8	2.5	2.3	2.0	1.7	2.4	2.0	2.0	1.8	1.5
ORF2	1.7	1.5	1.5	1.5	1.3	1.1	0.9	1.0	1.1	1.0
SWR	1.6	1.4	1.5	1.2	0.9	1.3	1.1	1.2	1.0	0.8
ARTE	0.8	0.9	0.9	0.9	0.9	0.9	1.0	1.0	1.1	1.1
KIKA	~	0.9	0.9	0.8	0.7	~	0.7	0.6	0.6	0.4
Bayern 3	1.1	0.9	0.9	0.7	0.6	1.0	0.8	0.8	0.7	0.6
Nickelodeon Schweiz					0.6					0.3
Foreign public channels	**18.1**	**18.0**	**17.9**	**16.9**	**18.4**	**17.1**	**16.7**	**17.0**	**16.5**	**17.4**
RTL	6.7	6.8	7.2	6.3	5.0	6.0	6.2	6.2	5.4	4.6
VOX	3.5	3.7	3.8	3.7	3.5	3.2	3.6	3.6	3.4	3.0
RTL 2	2.7	2.5	2.6	2.9	2.6	2.2	2.1	2.2	2.6	2.3
Kabel Eins	2.3	2.2	2.4	2.1	1.9	1.9	1.8	1.9	1.7	1.7
SuperRTL Suisse	2.6	2.0	1.9	1.4	1.2	2.3	1.7	1.5	1.2	1.0
Eurosport	0.9	0.8	0.7	0.7	0.5	0.5	0.5	0.5	0.4	0.3
Sixx CH					0.4					0.3
Foreign private channels	**19.4**	**18.7**	**18.9**	**18.3**	**16.3**	**16.6**	**16.3**	**16.2**	**15.8**	**14.0**
Others	**16.1**	**16.0**	**19.3**	**21.6**	**21.1**	**14.1**	**13.3**	**17.1**	**18.6**	**18.1**

➡ Eurodata TV Worldwide / Mediapulse Fernsehpanel



2009-2013 Daily share. In %, 3 years +.



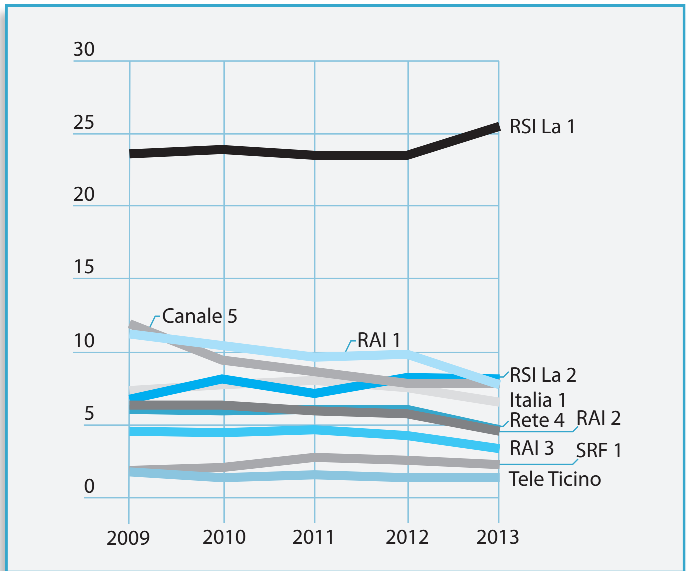
2013 Prime time (18:00-23:00). In %, 3 years +.

T.5.8 G.5.8 TV audience market share in Italian-speaking Switzerland

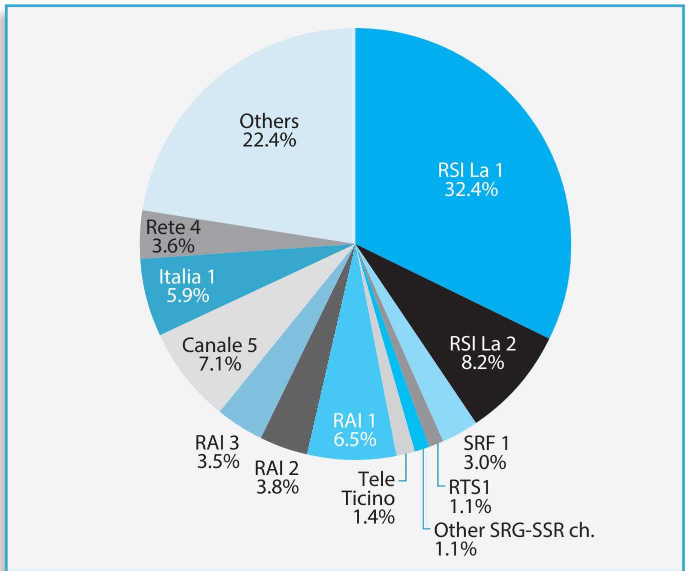
2009-2013 In %, 3 years +.

Channels	Daily share 2009	2010	2011	2012	2013	Prime time (18:00-23:00) 2009	2010	2011	2012	2013
RSI La 1 (ex TSI)	23.6	23.9	23.5	23.5	25.5	30.0	29.5	29.3	29.5	32.4
RSI La 2 (ex TSI2)	6.7	8.1	7.1	8.2	8.1	6.8	8.6	7.4	8.6	8.2
SRF 1	1.8	2.0	2.7	2.5	2.2	2.2	2.5	3.5	3.4	3.0
RTS1 (ex TSR1)	0.9	1.0	1.2	1.2	1.0	1.2	1.4	1.7	1.6	1.1
SRF ZWEI	–	–	0.8	0.9	0.5	–	–	0.9	1.0	0.5
RTS2 (ex TSR2)	0.3	0.3	0.3	0.4	0.4	0.3	0.4	0.3	0.4	0.4
SRF Info					0.2					0.2
Swiss public channels	**33.3**	**35.3**	**35.6**	**36.7**	**37.9**	**40.5**	**42.4**	**43.1**	**44.3**	**45.8**
Tele Ticino	1.7	1.3	1.5	1.3	1.3	1.5	1.5	1.8	1.6	1.4
Swiss private channels	**1.7**	**1.3**	**1.5**	**1.3**	**1.3**	**1.5**	**1.5**	**1.8**	**1.6**	**1.4**
RAI 1	11.2	10.4	9.6	9.8	7.7	9.6	8.9	7.7	8.3	6.5
RAI 2	6.3	6.3	5.9	5.7	4.5	6.1	5.9	5.6	5.2	3.8
RAI 3	4.5	4.4	4.6	4.2	3.3	4.6	4.5	4.5	4.0	3.5
ZDF	~	~	0.4	0.3	0.6	~	~	0.5	0.4	0.7
ARD	~	~	0.5	0.4	0.5	~	~	0.5	0.4	0.5
3sat	~	~	0.2	0.2	0.3	~	~	0.2	0.2	0.2
France 2	~	~	0.5	0.4	0.2	~	~	0.4	0.3	0.2
ARTE	~	0.4	0.3	0.3	0.2	~	0.5	0.3	0.4	0.3
TV5 Monde	~	0.2	0.2	0.3	0.1	~	0.1	0.1	0.2	0.1
ORF Eins				0.2	0.1				0.2	0.1
ORF 2					0.1					0.1
France 3				0.1	0.1				0.1	0.1
Foreign public channels	**22.0**	**21.7**	**22.4**	**22.1**	**17.7**	**20.3**	**19.9**	**19.8**	**19.7**	**16.2**
Canale 5	11.9	9.4	8.6	7.8	7.8	10.8	8.3	7.4	6.8	7.1
Italia 1	7.3	7.7	8.0	7.5	6.5	6.5	7.1	7.6	7.1	5.9
Rete 4	6.0	5.9	6.0	6.0	4.6	5.4	5.5	5.2	5.1	3.6
TF1 Suisse				0.4	0.6				0.3	0.5
Telelombardia	~	0.6	0.4	0.3	0.3	~	0.7	0.5	0.4	0.3
Italian private channels	**26.4**	**25.2**	**23.2**	**22.3**	**19.8**	**23.7**	**23.0**	**20.9**	**19.9**	**17.4**
M6 Suisse				0.1	0.4				0.1	0.4
Discovery Channel		0.2	0.1	0.1	0.3	~	0.2	0.1	0.1	0.2
Eurosport		0.4	0.5	0.5	0.2	~	0.3	0.3	0.3	0.1
RTL Schweiz				0.2	0.2				0.1	0.2
Other main foreign private channels		**1.6**	**0.6**	**1.4**	**1.4**		**1.2**	**0.4**	**1.1**	**1.3**
Others	**16.6**	**14.9**	**16.7**	**16.2**	**21.9**	**14.0**	**12.0**	**14.0**	**13.4**	**18.0**

➡ Eurodata TV Worldwide / Mediapulse Fernsehpanel / Source: Eurodata TV Worldwide / Publica Data AG / Telecontrol



2009-2013 Daily share. In %, 3 years +.



2013 Prime time (18:00-23:00). In %, 3 years +.

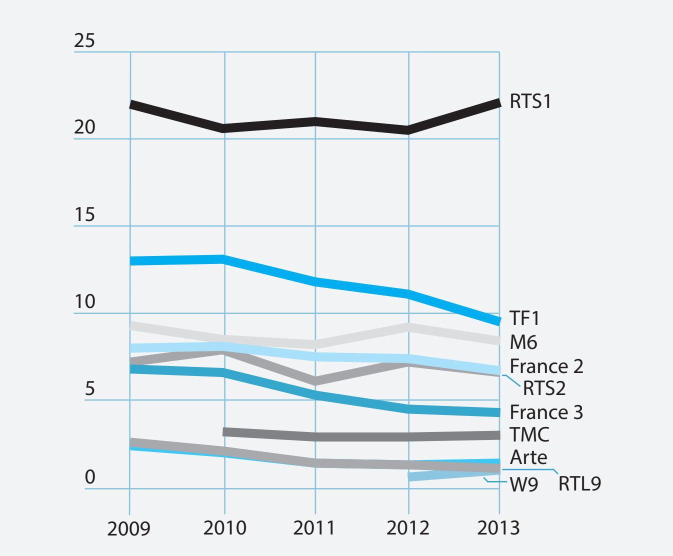
T.5.9
G.5.9

TV audience market share in French-speaking Switzerland

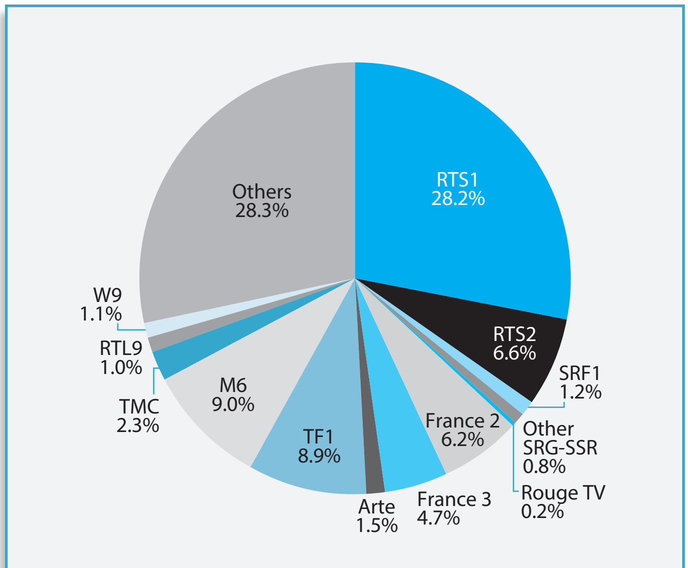
2009-2013 In %, 3 years +.

Channels	Daily share 2009	2010	2011	2012	2013	Prime time (18:00-23:00) 2009	2010	2011	2012	2013
RTS1 (ex TSR1)	22.0	20.6	21.0	20.5	22.1	27.6	26.2	27.2	26.1	28.2
RTS2 (ex TSR2)	7.2	7.9	6.1	7.2	6.6	7.2	8.3	6.0	7.5	6.6
SRF1 (ex SF1)	0.9	1.1	1.1	0.9	0.9	1.0	1.6	1.5	1.4	1.2
SRF ZWEI (ex SF2)	~	~	0.3	0.3	0.4	~	~	0.3	0.4	0.4
RSI la 1 (ex TSI 1)	0.2	0.2	0.2	0.2	0.1	0.2	0.2	0.2	0.1	0.1
RSI 2				0.1	0.1				0.1	0.1
3sat					0.1					0.1
SRF Info					0.1					0.1
Swiss public channels	**30.3**	**29.8**	**28.7**	**29.2**	**30.4**	**36.0**	**36.3**	**35.2**	**35.5**	**36.8**
Rouge TV					0.2					0.2
TVM3	0.2	0.3	~	~	~	0.2	0.1	~	~	~
MTV Schweiz	0.8	0.0	0.0	0.0	0.0	0.5	0.0	0.0	0.0	0.0
Swiss private channels	**1.0**	**0.3**	**0.0**	**0.0**	**0.2**	**0.7**	**0.1**	**0.0**	**0.0**	**0.2**
France 2	8.0	8.1	7.5	7.4	6.7	7.0	7.1	6.8	6.7	6.2
France 3	6.8	6.6	5.3	4.5	4.3	6.7	6.3	5.5	4.9	4.7
Arte	2.4	2.0	1.4	1.3	1.4	2.1	1.9	1.7	1.4	1.5
RAI1	~	~	0.7	0.6	0.4	~	~	0.7	0.6	0.4
ZDF					0.4					0.4
TV 5	1.4	1.4	1.1	0.9	0.3	1.0	1.1	1.0	0.9	0.3
ARD	~	~	0.4	0.3	0.3	~	~	0.4	0.3	0.4
France 24	~	~	0.2	0.2	0.2	~	~	0.2	0.2	0.1
Foreign public channels	**17.2**	**16.7**	**16.6**	**15.8**	**14.3**	**15.8**	**15.3**	**16.3**	**15.1**	**14.3**
TF1	13.0	13.1	11.8	11.1	9.5	12.9	12.9	10.4	10.3	8.9
M6	9.3	8.5	8.2	9.2	8.4	10.0	8.8	8.7	9.8	9.0
TMC	~	3.2	2.9	2.9	3.0	~	2.5	2.2	2.3	2.3
RTL9	2.6	2.1	1.4	1.3	1.1	2.7	2.1	1.4	1.4	1.0
W9				0.6	1.0				0.6	1.1
AB1	0.4	0.5	0.4	0.4	0.5	0.3	0.4	0.3	0.3	0.4
Eurosport	1.5	1.3	1.2	1.1	0.5	1.0	0.8	0.8	0.8	0.3
Planète+	~	1.2	0.8	0.6	0.4	~	0.8	0.6	0.5	0.3
MCM Top					0.3					0.2
RTL Schweiz				0.1	0.2				0.1	0.2
Foreign private channels	**26.8**	**29.9**	**26.7**	**28.3**	**25.5**	**26.9**	**28.3**	**24.4**	**26.8**	**24.2**
Others	**24.7**	**23.3**	**28.0**	**26.7**	**29.8**	**21.3**	**20.1**	**24.1**	**22.5**	**24.7**

➡ Eurodata TV Worldwide / Mediapulse Fernsehpanel



2009-2013 Daily share. In %, 3 years +.



2013 Prime time (18:00-23:00). In %, 3 years +.

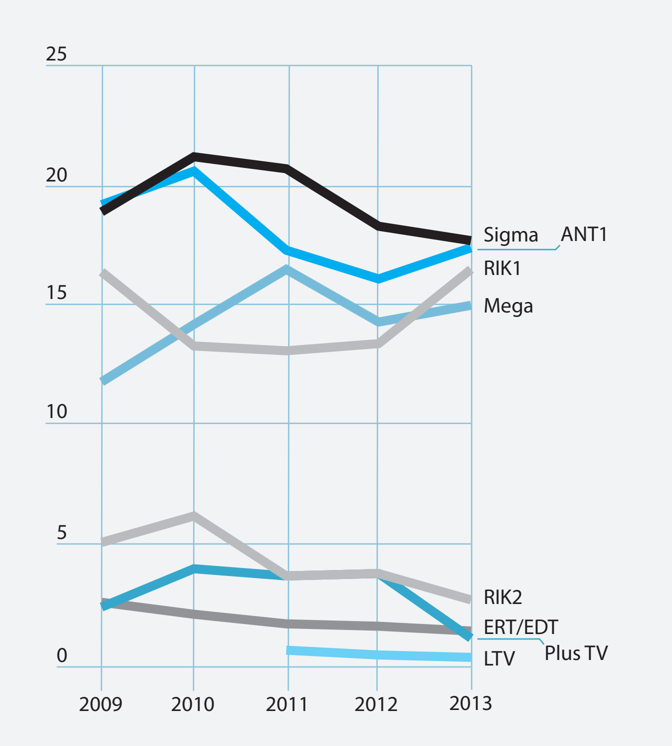
T.5.10 G.5.10 TV audience market share in Cyprus

2009-2013 In %, 4 years +.

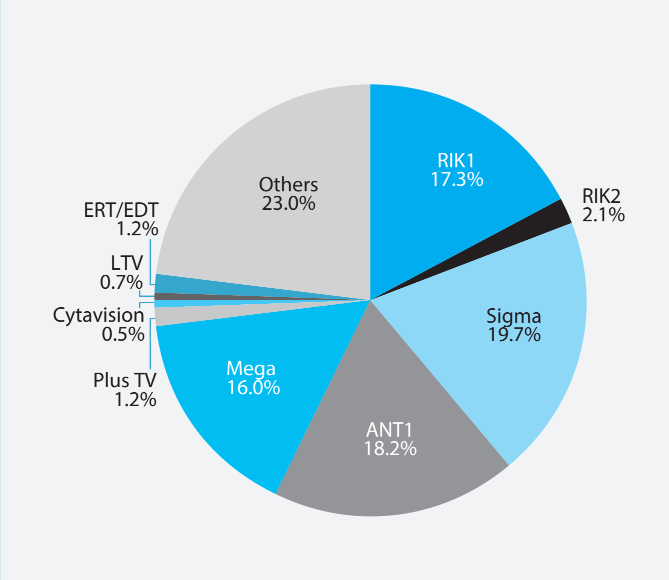
Channels	Daily share 2009	2010	2011	2012	2013	Prime time (19:00-22:00) ❻ 2009	2010	2011	2012	2013
RIK1	16.5	13.4	13.2	13.5	16.6	15.6	14.7	14.6	18.9	17.3
RIK2	5.2	6.3	3.8	3.9	2.8	3.9	3.3	2.3	2.7	2.1
Cyprus public channels	**21.7**	**19.7**	**17.0**	**17.4**	**19.4**	**19.5**	**18.0**	**16.9**	**21.6**	**19.4**
Sigma	19.0	21.3	20.8	18.4	17.8	19.9	24.4	24.3	21.2	19.7
ANT1	19.3	20.7	17.4	16.2	17.5	23.0	22.7	18.4	16.8	18.2
Mega	11.9	14.3	16.6	14.4	15.1	12.3	15.4	18.8	16.0	16.0
Plus Tv ❶	2.5	4.1	3.8	3.9	1.2	2.1	3.0	3.0	3.3	1.2
Cytavision Sports 1	–	–	0.2	0.2	0.3	–	–	0.3	0.3	0.4
LTV	–	–	0.7	0.5	0.1	–	–	0.8	0.5	0.1
LTV1 ❷	–	–	0.4	0.3	0.1	–	–	0.3	0.3	0.1
LTV2	–	–	0.2	0.3	0.1	–	–	0.2	0.2	0.2
LTV Sports 2	–	–	0.1	0.1	0.1	–	–	0.1	0.1	0.1
Cytavision Sports 2	–	–	0.0	0.0	0.1	–	–	0.0	0.0	0.1
Primesports	–	–	0.0	0.0	0.1	–	–	0.0	0.0	0.1
LTV3 ❸	–	–	0.1	0.2	0.0	–	–	0.1	0.1	0.1
LTV Sports 1	–	–	0.1	0.1	0.0	–	–	0.1	0.1	0.1
Cytavision Sports 3	–	–	0.0	0.0	0.0	–	–	0.0	0.0	0.0
Cytavision Sports 5	–	–	0.0	0.0	0.0	–	–	0.0	0.1	0.0
Cytavision Cinema ❹	–	–	0.1	0.1	–	–	–	0.1	0.1	–
Cyprus Private Channels	**52.7**	**60.4**	**60.5**	**54.7**	**52.5**	**57.3**	**65.5**	**66.5**	**59.1**	**56.4**
ERT/EDT ❺	2.7	2.2	1.8	1.7	1.5	1.9	1.5	1.2	1.1	1.2
DVD/VCR	**4.0**	**3.2**	**~**	**~**	**~**	**3.7**	**3.4**	**~**	**~**	**~**
Others	**18.9**	**14.5**	**20.7**	**26.2**	**26.6**	**17.6**	**11.6**	**15.4**	**18.2**	**23.0**

❶ Plus TV is no longer reported since 07/05/2013.
❷ LTV1 took over the frequency of ALFA in June 2012.
❸ LTV3 ceased broadcasting on September 2013.
❹ CYTAVISION CINEMA ceased broadcasting on 01/06/2012.
❺ EDT replaced ERT WORLD on 11/06/2013 after the closure of the Greek public broadcaster.
❻ Prime time definition changed to 18:00-24:00 starting from 2013.

➥ Eurodata TV Worldwide / Nielsen Television Audience Measurement



2009-2013 Daily share. In %, 4 years +.



2013 Prime time (18:00-24:00). In %, 4 years +.

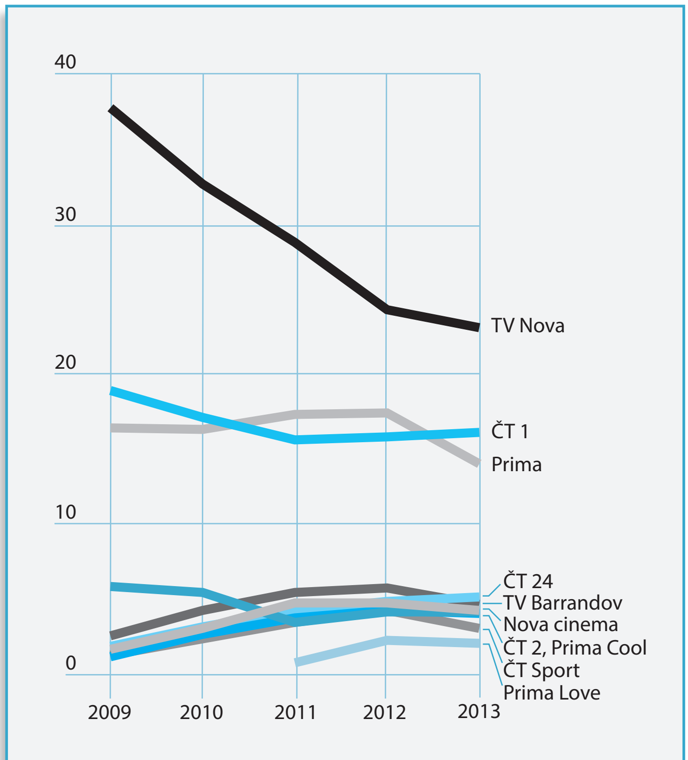
T.5.11 G.5.11 TV audience market share in the Czech Republic

2009-2013 In %, 4 years +.

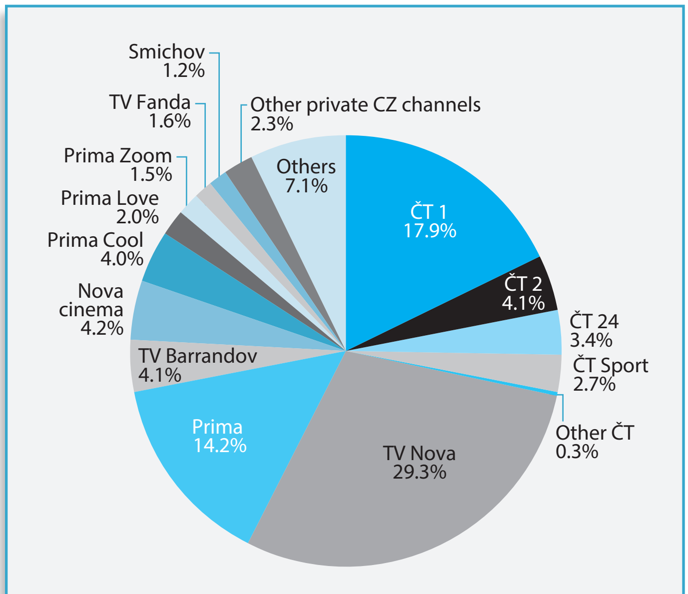
Channels	Daily share 2009	2010	2011	2012	2013	Prime time (19:00-23:00) 2009	2010	2011	2012	2013
ČT 1	19.0	17.2	15.7	15.9	16.2	20.4	18.4	17.2	17.3	17.9
ČT 2	5.9	5.5	3.5	4.2	4.2	5.2	5.1	3.0	3.5	4.1
ČT 24	1.9	3.2	4.3	4.9	5.2	1.1	2.0	2.6	3.2	3.4
ČT Sport (formerly ČT4) ❶	1.3	2.4	3.5	4.3	3.1	1.2	2.3	3.3	4.1	2.7
ČT :D					0.6					0.2
ČT art					0.0					0.1
Czech public channels	**28.1**	**28.3**	**27.0**	**29.3**	**29.2**	**27.9**	**27.8**	**26.1**	**28.1**	**28.4**
TV Nova	37.9	32.8	28.9	24.4	23.2	42.9	38.0	33.0	29.6	29.3
Prima (formerly Prima family)	16.5	16.4	17.4	17.5	14.1	16.3	15.6	18.0	18.0	14.2
TV Barrandov	2.6	4.3	5.5	5.8	4.7	2.0	4.0	5.5	5.6	4.1
Nova cinema	1.7	3.1	4.8	4.8	4.3	1.7	3.4	4.9	4.8	4.2
Prima Cool	1.2	2.7	3.8	4.3	4.1	1.1	2.7	3.6	4.1	4.0
Prima Love			0.8	2.3	2.1			0.6	1.9	2.0
Prima Zoom					2.0					1.5
TV Fanda ❷				0.3	1.4				0.3	1.6
Smichov					1.2					1.2
Šlágr TV					0.9					0.7
Telka					0.8					0.7
Ocko			0.4	0.6	0.6			0.2	0.3	0.3
Minimax	0.4	0.2	0.2	0.2	0.3	0.1	0.0	0.0	0.0	0.0
CS Film	0.1	0.2	0.2	0.2	0.2	0.1	0.2	0.2	0.2	0.2
Czech private channels	**61.0**	**60.4**	**62.3**	**60.6**	**60.3**	**64.5**	**64.3**	**66.2**	**64.9**	**64.5**
Disney Channel	1.2	0.8	0.7	0.6	0.6	0.4	0.4	0.3	0.3	0.3
Film+	0.3	0.2	0.2	0.2	0.2	0.2	0.2	0.1	0.1	0.1
AXN	0.2	0.2	0.1	0.1	0.2	0.2	0.2	0.1	0.2	0.2
Main foreign channels	**2.2**	**1.6**	**1.4**	**1.2**	**1.2**	**1.2**	**1.1**	**0.9**	**0.9**	**0.8**
Others	**8.7**	**9.7**	**9.3**	**8.8**	**9.3**	**6.4**	**6.8**	**6.8**	**6.0**	**6.3**

❶ CT4 was renamed ČT SPORT. ČT SPORT has been measured since 01/10/2013.
❷ TV Fanda started broadcasting on 14/07/2012.

➡ Eurodata TV Worldwide, TV MR AM / AGB Nielsen Media Research



2009-2013 Daily share. In %, 4 years +.



2013 Prime time (19:00-23:00). In %, 4 years +.

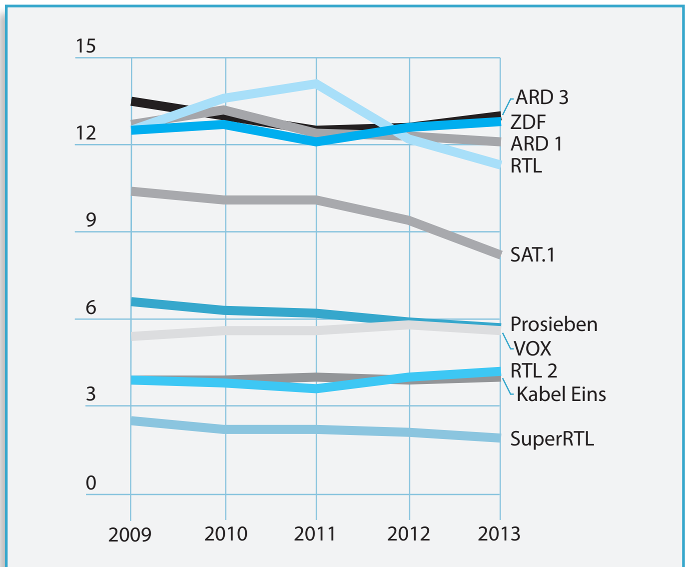
T.5.12
G.5.12

TV audience market share in Germany

2009-2013 Daily share. In %, 3 years +.

Channels	Daily share 2009	2010	2011	2012	2013
ARD 3	13.5	13.0	12.5	12.6	13.0
ARD 1	12.7	13.2	12.4	12.3	12.1
ZDF	12.5	12.7	12.1	12.6	12.8
KI.KA	1.4	1.4	1.3	1.4	1.2
3sat	1.1	1.0	1.0	1.0	1.1
PHOENIX	1.0	1.0	1.1	1.1	1.1
ARTE	0.7	0.8	0.8	0.8	0.9
ZDF Neo	0.1	0.2	0.4	0.6	1.0
ZDF Infokanal	0.1	0.1	0.1	0.4	0.7
ZDF Kultur	–	–	–	0.1	0.2
German public channels	**43.1**	**43.4**	**41.7**	**42.9**	**44.1**
RTL	12.5	13.6	14.1	12.2	11.3
SAT.1	10.4	10.1	10.1	9.4	8.2
Prosieben	6.6	6.3	6.2	5.9	5.7
VOX	5.4	5.6	5.6	5.8	5.6
RTL 2	3.9	3.8	3.6	4.0	4.2
Kabel Eins	3.9	3.9	4.0	3.9	4.0
SuperRTL	2.5	2.2	2.2	2.1	1.9
N 24	1.0	1.0	1.0	1.0	1.0
Tele 5	1.0	0.9	1.0	1.0	0.9
n-tv	0.9	0.9	1.0	0.9	0.9
Sport 1	0.9	0.8	0.9	0.7	0.9
DMAX	0.7	0.7	0.7	0.7	0.9
NICK	0.9	0.8	0.8	0.7	0.7
RTL Nitro	–	–	–	0.5	0.7
Sky Krimi			0.2	0.1	0.7
Sixx	–	–	0.3	0.6	0.6
VIVA	0.6	0.5	0.5	0.5	0.4
Comedy Central	0.3	0.3	0.4	0.3	0.3
13th Street				0.2	0.3
Syfy				0.2	0.2
Main German private channels	**52.5**	**52.1**	**53.7**	**52.1**	**50.6**
Eurosport	0.9	0.7	0.7	0.7	0.7
Others	**3.5**	**3.8**	**3.9**	**4.3**	**4.6**

➡ Eurodata TV Worldwide / AGF-GfK Fernsehforschung



2009-2013 Daily share. In %, 3 years +.

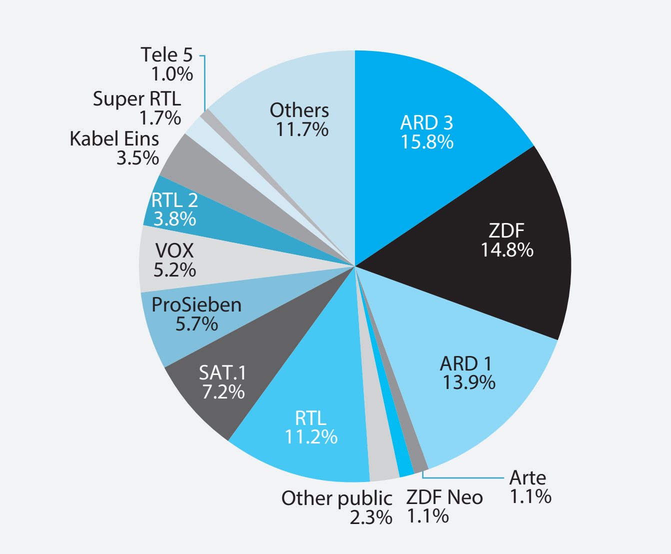
T.5.13
G.5.13

TV audience market share in Germany

2009-2013 Prime time (19:00-23:00). In %, 3 years +.

Channels	Prime time (19:00-23:00) 2009	2010	2011	2012	2013
ARD 3	15.7	15.2	14.8	15.0	15.8
ZDF	14.3	14.7	14.3	14.8	14.8
ARD 1	14.4	15.0	14.2	14.3	13.9
Arte	0.9	0.9	0.9	0.9	1.1
ZDF Neo	0.1	0.2	0.4	0.7	1.1
3sat	1.0	0.9	0.9	0.9	1.0
Phoenix	0.7	0.7	0.8	0.8	0.9
KiKa	0.8	0.9	1.0	1.0	0.8
ZDF Infokanal	0.1	0.1	0.1	0.3	0.5
German public channels	**48.0**	**48.6**	**47.4**	**48.8**	**50.0**
RTL	13.0	13.3	13.6	11.8	11.2
SAT.1	7.8	8.1	8.2	7.7	7.2
ProSieben	6.8	6.7	6.5	6.0	5.7
VOX	5.9	5.8	5.9	5.7	5.2
RTL 2	3.6	3.6	3.3	3.8	3.8
Kabel Eins	3.4	3.3	3.6	3.6	3.5
Super RTL	2.2	2.0	2.0	1.8	1.7
Tele 5	1.0	0.9	1.1	1.1	1.0
Sport 1 (formerly DSF)	0.9	0.8	0.8	0.7	0.8
DMAX	0.5	0.6	0.6	0.6	0.8
Sixx				0.6	0.6
n-tv	0.5	0.5	0.6	0.5	0.5
N 24	0.6	0.6	0.5	0.5	0.5
RTL Nitro				0.3	0.4
Comedy Central	0.3	0.3	0.4	0.3	0.3
VIVA	0.3	0.3	0.3	0.3	0.3
Das Vierte	0.8	0.3	0.3	0.3	0.2
13th Street				0.2	0.2
NICK	0.3	0.3	0.3	0.2	0.2
SKY CINEMA				0.2	0.2
German private channels	**48.2**	**47.7**	**48.0**	**47.4**	**45.6**
Eurosport	0.6	0.0	0.5	0.5	0.5
Others	**3.2**	**3.7**	**4.1**	**3.3**	**3.9**

➥ Eurodata TV Worldwide / AGF-GfK Fernsehforschung



2013 Prime time (19:00-23:00). In %, 3 years +.

T.5.14
G.5.14

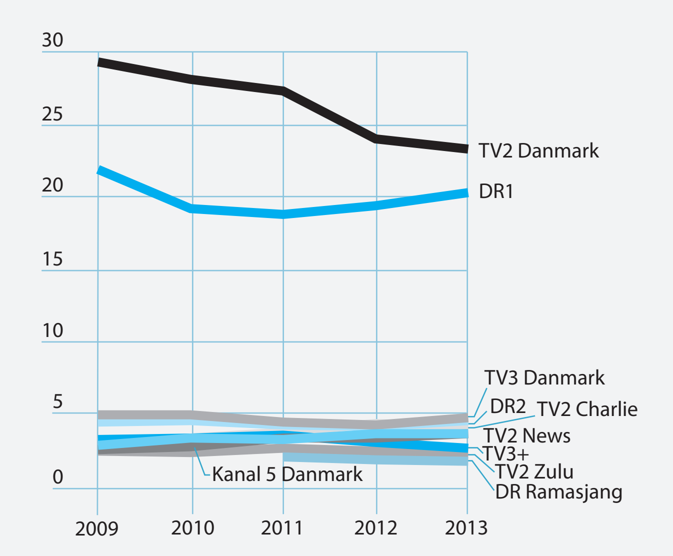
TV audience market share in Denmark

2009-2013 In %, 3 years +.

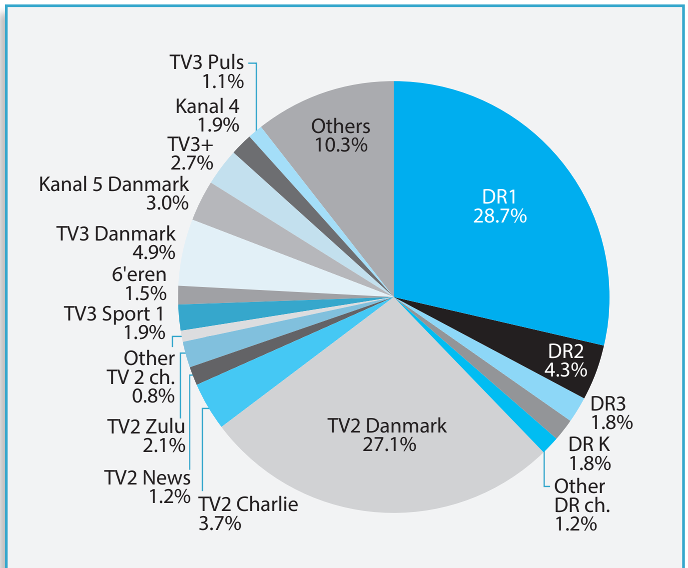
Channels	Daily share 2009	2010	2011	2012	2013	Prime time (18:30-23:00) ❷ 2009	2010	2011	2012	2013
DR1	21.9	19.2	18.8	19.4	20.3	28.3	25.9	25.7	27.1	28.7
DR2	4.5	4.6	4.3	4.2	4.6	5.4	5.5	5.4	4.9	4.3
DR Ramasjang			2.1	1.9	1.8			1.0	1.0	0.5
DR3					1.7					1.8
DR K			1.1	1.4	1.8			1.4	1.5	1.8
DR Ultra					0.9					0.6
TV2 Danmark ❶	29.3	28.1	27.3	24.0	23.3	31.5	30.4	29.9	26.0	27.1
TV2 Charlie ❶	3.1	3.4	3.8	4.4	4.2	3.1	3.4	3.6	4.2	3.7
TV2 News ❶	2.6	2.8	3.4	3.4	3.7	1.0	1.0	1.3	1.3	1.2
TV2 Zulu ❶	2.5	2.4	2.7	2.5	2.4	2.2	2.1	2.3	2.2	2.1
TV2 Fri					0.7					0.4
TV2 Film	1.2	1.1	1.0	0.7	0.5	0.9	0.9	0.9	0.6	0.4
Danish public channels	**65.1**	**61.6**	**65.2**	**62.7**	**66.0**	**72.4**	**69.2**	**71.5**	**68.8**	**72.7**
TV3 Sport 1	–	–	–	1.6	1.7	–	–	–	1.7	1.9
6'eren	1.3	1.3	1.7	1.8	1.6	1.2	1.3	1.5	1.7	1.5
Regional TV				0.5	0.7				~	0.9
Danish private channels	**1.8**	**1.7**	**2.2**	**4.5**	**4.4**	**1.6**	**1.7**	**2.0**	**3.8**	**4.6**
TV3 Danmark	5.0	5.0	4.5	4.3	4.8	5.0	4.9	4.3	4.2	4.9
Kanal 5 Danmark	2.9	3.4	3.3	3.7	3.7	3.0	3.4	3.2	3.4	3.0
TV3+	3.3	3.4	3.6	3.1	2.7	3.2	3.3	3.4	3.0	2.7
Kanal 4	1.8	2.0	1.8	1.9	1.8	2.0	2.0	2.0	2.2	1.9
Disney Channel	1.9	1.8	1.8	1.8	1.5	0.8	0.9	0.8	0.8	0.6
TV3 Puls	1.4	1.3	1.4	1.4	1.4	1.1	0.9	1.1	1.0	1.1
Discovery Channel Danmark	1.3	1.1	1.0	1.0	0.9	0.8	0.9	0.6	0.7	0.6
Canal 9			0.5	0.8	0.9			0.4	0.7	0.7
TLC			0.1	0.8	0.8			0.5	0.5	0.6
Nickelodeon Danmark			0.6	0.6	0.7			~	~	0.3
Disney XD	0.4	0.7	0.6	0.6	0.6	0.4	0.3	0.3	0.3	0.4
Foreign channels	**22.1**	**22.5**	**23.9**	**25.2**	**25.1**	**19.2**	**18.4**	**18.6**	**18.8**	**19.4**
Others	**11.0**	**14.2**	**8.7**	**7.6**	**4.5**	**6.8**	**10.7**	**7.9**	**8.6**	**3.3**

❶ Since 11/01/2012: TV2, TV2 Charlie, TV2 News and TV2 Zulu are only available on pay TV.
❷ Prime time definition changed to 19:00-22:00 starting from 2013.

➥ Eurodata TV Worldwide / TNS GALLUP TV-METER



2009-2013 Daily share. In %, 3 years +.



2013 Prime time (19:00-22:00). In %, 3 years +.

1 2 3 4 5 6 7 8

T.5.15
G.5.15

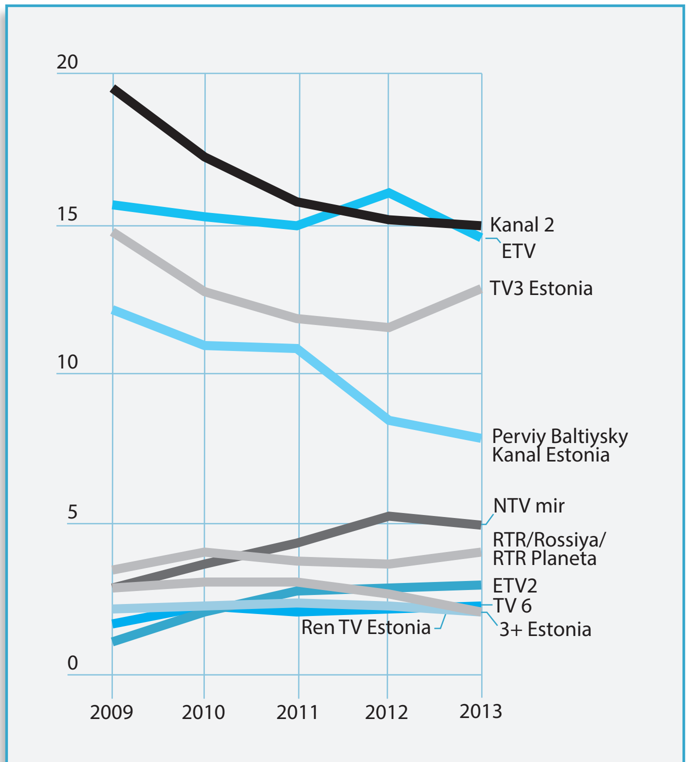
TV audience market share in Estonia

2009-2013 In %, 4 years +.

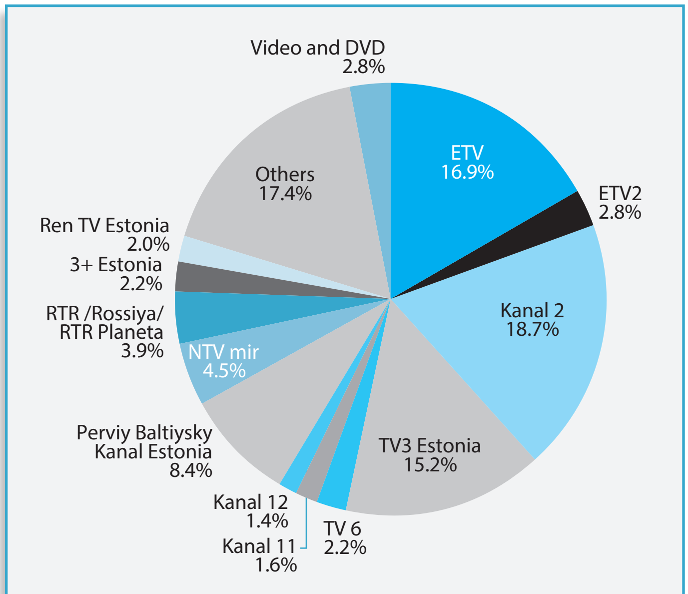
Channels	Daily share 2009	2010	2011	2012	2013	Prime time (19:00-22:00) 2009	2010	2011	2012	2013 ❶
ETV	15.7	15.3	15.0	16.1	14.6	18.0	17.4	18.4	20.2	16.9
ETV2	1.1	2.1	2.8	2.9	3.0	1.2	2.0	2.3	2.4	2.8
Estonian public channels	**16.8**	**17.4**	**17.8**	**19.0**	**17.6**	**19.2**	**19.4**	**20.7**	**22.6**	**19.7**
Kanal 2	19.6	17.3	15.8	15.2	15.0	24.9	22.6	21.8	19.3	18.7
TV3 Estonia	14.8	12.8	11.9	11.6	12.9	17.0	16.1	14.2	15.0	15.2
TV 6	1.7	2.3	2.1	2.2	2.3	1.4	1.9	1.9	1.8	2.2
Kanal 11	1.6	2.1	2.1	1.7	1.7	1.2	1.6	1.5	1.4	1.6
Kanal 12			0.7	1.3	1.5			0.5	1.0	1.4
Tallinna TV			0.1	0.3	0.7			0.1	0.3	0.5
Kidzone					0.5					0.3
Seitse	0.2	0.3	0.3	0.2	~	0.1	0.2	0.1	0.1	~
Estonian private channels	**37.9**	**34.8**	**33.0**	**32.5**	**34.6**	**44.6**	**42.4**	**40.1**	**38.9**	**39.9**
Perviy Baltiysky Kanal Estonia	12.2	11.0	10.9	8.5	7.9	13.1	10.9	10.4	8.8	8.4
NTV mir	2.9	3.7	4.4	5.3	5.0	2.4	3.1	4.1	4.6	4.5
Finnish channels	~	~	~	~	~	~	~	~	~	~
RTR /Rossiya/RTR Planeta	3.5	4.1	3.8	3.7	4.1	2.8	4.0	3.6	3.4	3.9
3+ Estonia	2.9	3.1	3.1	2.7	2.1	2.8	2.8	2.8	2.3	2.2
Ren TV Estonia	2.2	2.3	2.4	2.3	2.1	1.7	2.1	2.2	2.0	2.0
Fox (formerly Fox Crime)		0.8	0.9	1.1	1.2		0.6	0.6	0.7	0.8
Fox Life		0.9	0.9	0.9	0.8		0.6	0.7	0.6	0.7
SET (Sony Entertainment Television)			0.6	0.6	0.8			0.4	0.4	0.7
CTC				0.5	0.6				0.3	0.4
National Geographic		0.2	0.3	0.4	0.3		0.1	0.2	0.2	0.2
Sony Turbo					0.1					0.1
Foreign channels	**23.7**	**26.1**	**27.3**	**26.0**	**25.0**	**22.8**	**24.2**	**25.0**	**23.3**	**23.9**
Other channels	**19.6**	**18.7**	**17.9**	**19.7**	**19.5**	**11.9**	**11.5**	**12.4**	**13.1**	**13.9**
Video and DVD	**2.0**	**3.0**	**4.0**	**2.7**	**3.3**	**1.5**	**2.5**	**1.9**	**2.1**	**2.8**

❶ Prime time definition changed to 18:00-23:00 starting from 2013.

Eurodata TV Worldwide / TNS EMOR



2009-2013 Daily share. In %, 4 years +.



2013 Prime time (18:00-23:00). In %, 4 years +.

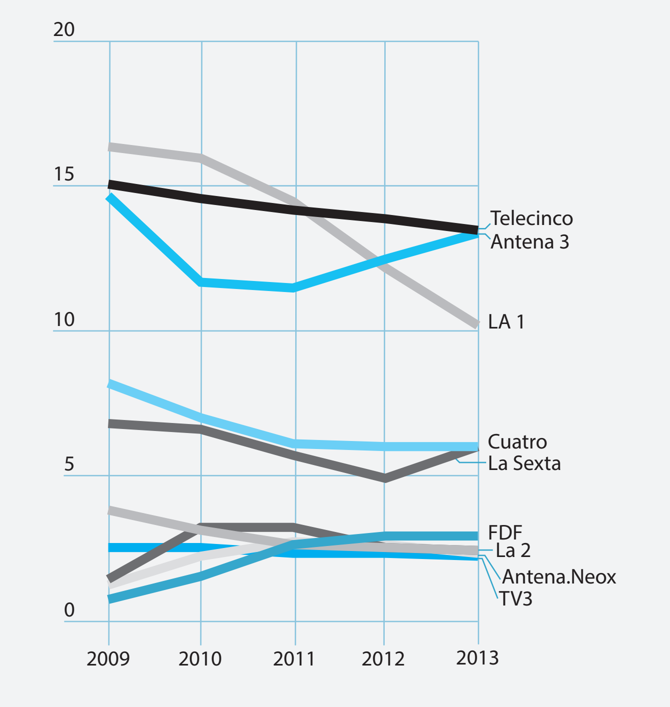
T.5.16
G.5.16

TV audience market share in Spain

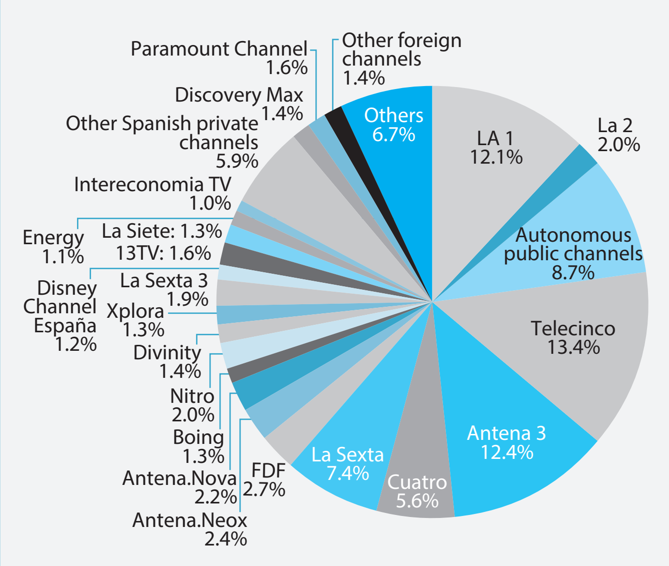
2009-2013 In %, 4 years +.

Channels	Daily share 2009	2010	2011	2012	2013	Prime time (20:30-24:00) 2009	2010	2011	2012	2013
LA 1	16.4	16.0	14.5	12.2	10.2	16.7	16.9	15.9	13.3	12.1
La 2	3.8	3.1	2.6	2.5	2.4	3.1	2.5	2.3	2.0	2.0
Clan	1.4	3.2	3.2	2.5	2.4	0.9	2.4	2.3	1.8	1.7
Teledeporte	0.6	1.1	1.0	0.8	0.9	0.4	0.8	0.9	0.8	0.8
Canal 24 Horas	0.4	0.7	0.9	0.9	0.8	0.4	0.7	0.7	0.7	0.6
Spanish national public channels	**22.6**	**24.1**	**22.2**	**18.9**	**16.7**	**21.5**	**23.3**	**22.1**	**18.6**	**17.2**
TV3	2.5	2.5	2.3	2.3	2.2	2.9	2.9	2.7	2.6	2.4
Canal Sur Televisión	3.0	2.4	2.1	2.0	2.0	2.8	2.3	2.0	1.8	1.7
Autonomous public channels	**13.9**	**11.5**	**10.0**	**9.6**	**8.4**	**14.3**	**11.1**	**11.1**	**10.5**	**8.7**
Telecinco	15.1	14.6	14.2	13.9	13.5	16.2	14.4	13.2	14.4	13.4
Antena 3	14.7	11.7	11.5	12.5	13.4	13.9	11.5	11.3	11.2	12.4
Cuatro	8.2	7.0	6.1	6.0	6.0	8.7	7.2	5.9	5.7	5.6
La Sexta	6.8	6.6	5.7	4.9	6.0	7.5	7.2	6.9	6.2	7.4
FDF (Factoria de Ficcion)	0.7	1.5	2.6	2.9	2.9	0.8	1.9	2.7	2.7	2.7
Antena.Neox	1.2	2.2	2.7	2.6	2.3	1.2	2.3	2.6	2.5	2.4
Antena.Nova	0.7	1.5	1.5	1.6	2.1	0.7	1.5	1.7	1.7	2.2
Boing		0.7	1.1	1.7	1.7		0.5	0.8	1.2	1.3
Nitro		1.2	1.4	1.6	1.7		1.2	1.4	1.8	2.0
Divinity			0.9	1.4	1.7			0.9	1.3	1.4
Xplora				0.9	1.7				0.8	1.3
La Sexta 3		0.4	1.4	1.6	1.6		0.4	1.6	2.0	1.9
Disney Channel España	1.4	2.1	1.7	1.6	1.5	1.1	1.9	1.4	1.3	1.2
13TV			0.4	1.0	1.3			0.4	1.1	1.6
La Siete	0.8	1.4	1.5	1.4	1.2	0.7	1.3	1.3	1.3	1.3
Energy				0.9	1.2				0.8	1.1
Spanish private channels	**55.2**	**54.3**	**61.0**	**62.7**	**66.1**	**56.2**	**55.0**	**60.6**	**63.4**	**66.1**
Discovery Max				1.2	1.6				1.0	1.4
Paramount Channel				1.1	1.4				1.2	1.6
Foreign channels	**8.6**	**2.0**	**1.0**	**4.1**	**4.5**	**0.8**	**~**	**~**	**3.7**	**4.4**
Others	**-0.3**	**8.1**	**5.8**	**4.7**	**4.3**	**7.2**	**10.6**	**6.2**	**3.8**	**3.6**

➥ Eurodata TV Worldwide / Kantar Media



2009-2013 Daily share. In %, 4 years +.



2013 Prime time (20:30-24:00). In %, 4 years +.

T.5.17
G.5.17

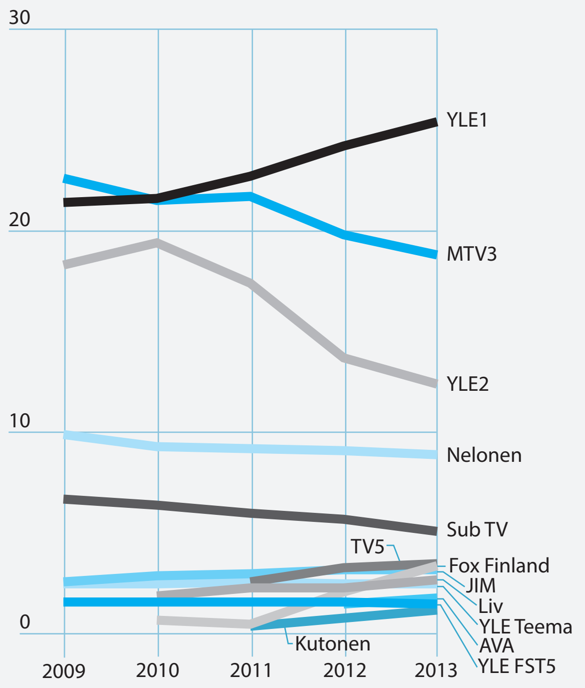
TV audience market share in Finland

2009-2013 In %, 4 years +.

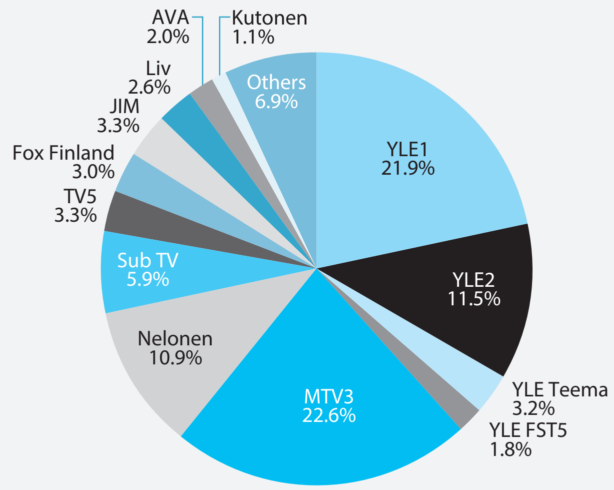
Channels	Daily share 2009	2010	2011	2012	2013	Prime time (18:00-23:00) 2009	2010	2011	2012	2013
YLE1	21.4	21.6	22.7	24.2	25.4	20.8	20.4	21.8	22.6	21.9
YLE2	18.3	19.4	17.4	13.7	12.4	17.3	18.6	16.0	12.4	11.5
YLE Teema	2.5	2.5	2.6	2.5	2.5	2.5	2.5	2.7	2.9	3.2
YLE FST5	1.6	1.6	1.6	1.6	1.5	1.9	1.8	1.7	1.7	1.8
Finnish public channels	**43.8**	**45.1**	**44.3**	**42.0**	**41.8**	**42.5**	**43.3**	**42.2**	**39.6**	**38.4**
MTV3	22.6	21.5	21.7	19.8	18.8	24.6	24.2	24.3	23.2	22.6
Nelonen	9.9	9.3	9.2	9.1	8.9	11.0	10.5	10.2	10.4	10.9
Sub TV	6.7	6.4	6.0	5.7	5.1	8.0	7.4	7.4	6.4	5.9
TV5 (TV Viisi)	–	–	2.6	3.3	3.5			2.7	3.3	3.3
Fox Finland (former Suomi TV)		0.7	0.5	2.1	3.4		0.8	0.7	2.3	3.0
JIM	2.6	2.9	3.0	3.2	3.2	2.6	2.6	2.8	3.1	3.3
Liv		1.9	2.3	2.3	2.7		1.7	2.2	2.3	2.6
AVA				1.5	1.8				1.8	2.0
Kutonen (former The Voice)	–	–	0.4	0.8	1.2			0.2	0.6	1.1
MusicTV	0.7	0.5	0.5	0.5	0.4	0.5	0.4	0.3	0.3	0.3
Nelonen Pro 2	1.3	0.6	~	~	~		0.8	~	~	~
The Voice/TV Viisi (1)	1.5	2.0	–	–	~	1.5	2.0	–	–	~
Urheilukanava	1.3	–	–	–	~	1.3	–	–	–	~
Main Finnish private channels	**45.9**	**45.3**	**45.7**	**47.8**	**48.6**	**49.0**	**50.0**	**50.5**	**53.4**	**54.7**
Discovery Channel	0.7	0.6	0.5	0.7	0.6	0.4	0.3	0.3	0.4	0.4
MusicTV	0.7	0.5	0.5	0.5	0.4	0.5	0.4	0.3	0.3	0.3
National Geographic					0.1					0.1
Others	**9.6**	**9.1**	**9.5**	**9.7**	**9.1**	**7.6**	**6.0**	**6.7**	**6.3**	**6.2**

(1) TV5 and the Voice became separate channels on 01/04/2011.

Eurodata TV Worldwide / Finnpanel Oy



2010-2013 Daily share. In %, 4 years +.



2013 Prime time (18:00-23:00). In %, 4 years +.

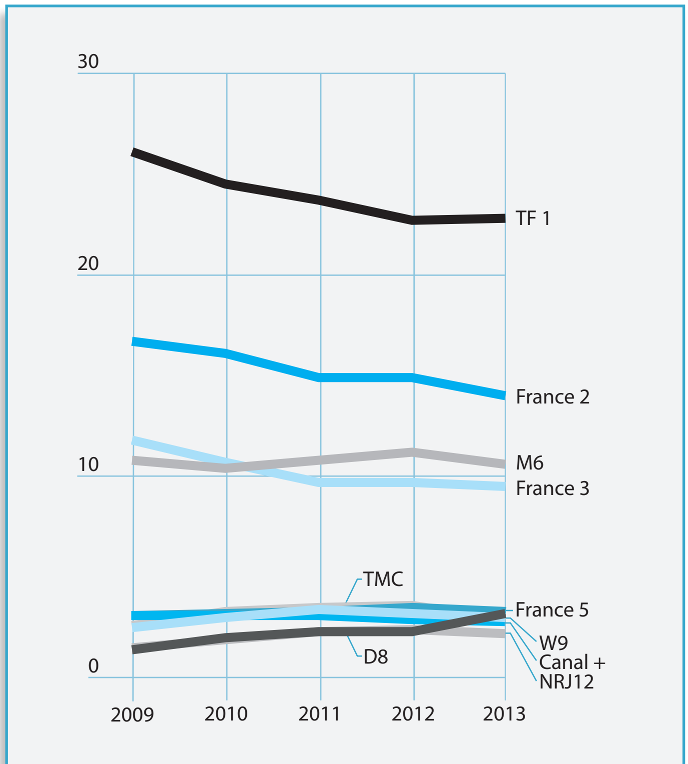
T.5.18 G.5.18 TV audience market share in France

2009-2013 In %, 4 years +.

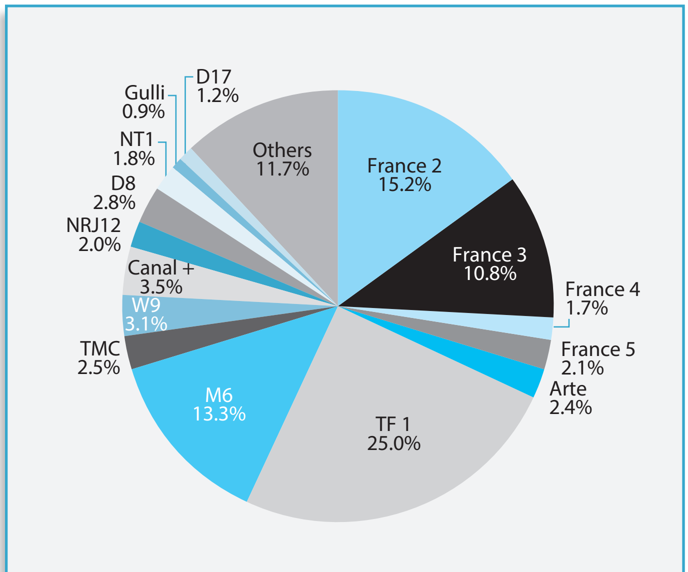
Channels	Daily share 2009	2010	2011	2012	2013	Prime time (19:15-22:00) 2009	2010	2011	2012	2013 [3]
France 2	16.7	16.1	14.9	14.9	14.0	17.1	16.5	15.3	15.7	15.2
France 3	11.8	10.7	9.7	9.7	9.5	14.6	13.2	12.8	12.9	10.8
France 4	1.1	1.6	2.0	2.1	1.8	~	1.4	1.8	1.7	1.7
France 5	3.1	3.2	3.3	3.5	3.3	–	1.7	2.1	2.4	2.1
Arte	1.7	1.6	1.5	1.8	2.0	2.5	2.2	2.1	2.1	2.4
French public channels	34.4	33.2	31.4	32.0	30.6	34.2	35.0	34.1	34.8	32.2
TF 1	26.1	24.5	23.7	22.7	22.8	28.0	27.5	25.4	24.4	25.0
M6	10.8	10.4	10.8	11.2	10.6	11.6	10.8	12.5	13.6	13.3
TMC	2.6	3.3	3.5	3.6	2.9	~	2.8	2.8	2.7	2.5
W9	2.5	3.0	3.4	3.2	3.0	2.5	2.9	3.3	3.0	3.1
Canal +	3.1	3.1	3.1	2.9	2.8	4.6	4.7	5	4.7	3.5
NRJ12	1.5	1.9	2.3	2.4	2.2	~	~	2	1.9	2.0
D8 (former Direct 8) [1]	1.4	2.0	2.3	2.3	3.2	~	~	1.9	1.8	2.8
NT1	1.4	1.6	1.9	2.1	2.1	~	~	1.5	1.7	1.8
Gulli	1.8	2.2	2.1	1.9	1.4	~	1.4	1.5	1.3	0.9
BFM TV	0.7	0.9	1.4	1.8	1.9	~	~	~	~	~
D17 [2]	0.7	1.0	1.2	1.2	1.3	~	~	~	~	1.2
i>TELE	–	–	0.8	0.8	0.8	–	–	~	~	~
Main French private channels	52.6	53.9	56.5	56.1	55.0	45.8	46.7	50.1	55.1	56.1
Others	13.0	12.9	12.1	11.9	14.4	20.0	18.3	15.8	10.1	11.7

[1] DIRECT 8 ceased broadcasting on 07/10/2012 and was replaced by D8.
[2] DIRECT STAR ceased broadcasting on 07/10/2012 and was replaced by D17.
[3] Prime time definition changed to 20:00-23:00 starting from 2013.

➥ Eurodata TV Worldwide / Médiamétrie - Mediamat



2010-2013 Daily share. In %, 4 years +.



2013 Prime time (20:00-23:00). In %, 4 years +.

T.5.19
G.5.19

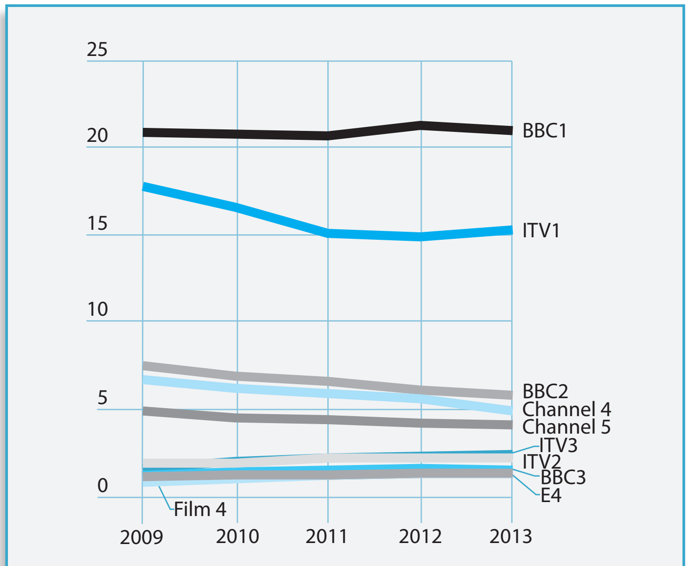
TV audience market share in the United Kingdom

2009-2013 In %, 3 years +.

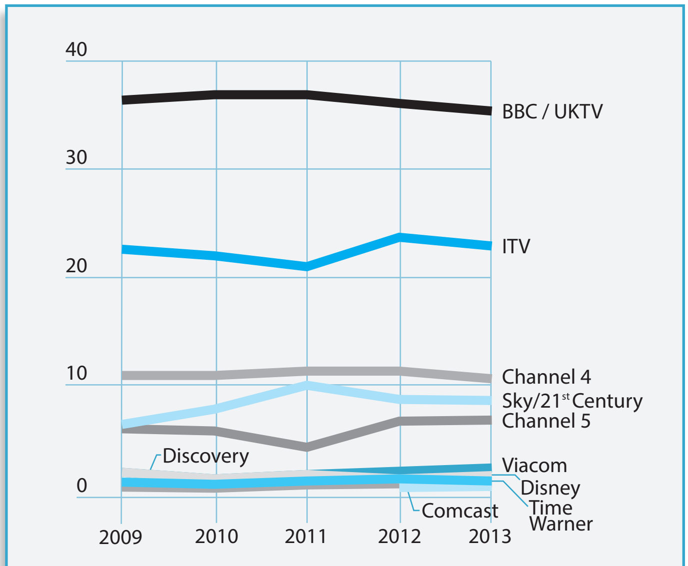
Channels	Daily share 2009	2010	2011	2012	2013	Prime time (18:00-22:30) 2009	2010	2011	2012	2013 [1]
BBC1	20.9	20.8	20.7	21.3	21.0	22.9	23.1	22.6	23.5	21.1
BBC2	7.5	6.9	6.6	6.1	5.8	8.6	7.9	7.8	7.3	7.2
BBC3	1.2	1.4	1.5	1.6	1.5	1.5	1.6	1.6	1.6	2.0
BBC4	0.5	0.6	0.7	0.9	0.9	0.7	0.8	0.9	1.2	1.6
CBeebies				1.2	1.3				0.3	0.0
BBC Others	2.5	3.3	3.4	2.0	1.8	0.9	1.3	1.4	1.1	0.6
UKTV / others	3.8	3.9	4	4.2	4.4	2.8	3.3	3.1	4.0	4.1
Total BBC / UKTV	**36.4**	**36.9**	**36.9**	**36.1**	**35.4**	**37.4**	**38**	**37.4**	**38.7**	**32.5**
ITV1	17.8	16.6	15.1	14.9	15.3	22.7	21.7	19.9	19.9	20.2
ITV3	1.6	2	2.2	2.3	2.4	1.5	1.8	2.0	2.1	2.2
ITV2	1.9	1.9	2.2	2.2	2.2	1.6	1.5	1.7	1.7	2.0
ITV4	0.8	0.9	1.1	1.1	1.0	0.8	0.9	0.9	1.0	1.0
Other ITV	0.6	0.7	0.5	3.3	2.1	0.4	0.6	0.4	3.1	1.6
Total ITV	**22.7**	**22.1**	**21.1**	**23.8**	**23**	**27**	**26.5**	**24.9**	**27.8**	**27.0**
Channel 4	6.7	6.2	5.9	5.6	4.9	6.9	6.4	6.1	5.8	5.3
E4	1.1	1.2	1.2	1.3	1.3	1.1	1.2	1.3	1.4	1.4
Film 4	0.8	1	1.2	1.3	1.3	0.8	1.0	1.2	1.2	1.4
More 4	1	1	1.1	1.1	1.1	0.9	0.9	1.1	1.0	1.0
Other Channel 4	1.5	1.7	2.0	2.2	2.2	1.5	1.4	1.9	2.2	2.1
Total Channel 4	**11.1**	**11.1**	**11.4**	**11.5**	**10.8**	**11.2**	**10.9**	**11.6**	**11.6**	**11.2**
Sky Sports 1	1.3	1.1	1.2	1.2	1.1	0.9	0.8	1	1.0	0.9
Sky Three/ Pick TV	0.7	0.8	0.9	0.9	1.0	0.7	0.6	0.7	0.7	0.8
Sky One	1.1	0.9	1.1	0.9	0.9	1.4	1.2	1.4	1.2	1.2
Sky News	0.5	0.6	0.7	0.6	0.7	0.2	0.3	0.3	0.3	0.3
Sky others	2.4	3.9	4.6	3.5	4	2.2	3.9	3.9	3.9	3.7
Other 21st Century Fox			1.1	1.2	1.1			1	1.3	1.3
Total Sky/21st Century Fox	**6.6**	**8.0**	**10.2**	**8.9**	**8.8**	**5.4**	**6.8**	**8.3**	**7.8**	**8.2**
Channel 5	4.9	4.5	4.4	4.2	4.1	4.9	4.5	4.3	4.1	4.2
Channel 5 others	1.3	1.5	0.1	1.8	2.0	0.0	0.0	0.0	1.9	2.2
Total Channel 5	**6.2**	**6.0**	**4.5**	**6.9**	**7.0**	**4.9**	**4.5**	**4.3**	**7.0**	**7.4**
Total Viacom	**2.2**	**1.6**	**2.0**	**2.3**	**2.6**	**1.2**	**1.1**	**1.5**	**1.7**	**1.8**
Total Discovery	**2.2**	**1.6**	**2.0**	**1.6**	**1.9**	**0.8**	**0.6**	**1.1**	**1.6**	**2.1**
Total Disney	**1.3**	**1.1**	**1.4**	**1.6**	**1.4**	**0.8**	**0.7**	**0.9**	**0.9**	**0.8**
Others	**11.3**	**11.6**	**10.5**	**7.3**	**9.1**	**11.3**	**10.9**	**10.0**	**2.9**	**9.0**

[1] Prime time definition changed to 19:00-23:00 starting from 2013.

Eurodata TV Worldwide / BARB / TNS UK



2009-2013 Daily share - Channels.



2009-2013 Daily share - Leading TV groups.

T.5.20
G.5.20

TV audience market share in Greece

2009-2013 In %, 4 years +.

Channels	Daily share 2009	2010	2011	2012	2013	Prime time (21:00-24:00) ❶ 2009	2010	2011	❶ 2012	2013
NET ❷	9.4	8.6	7.6	8.1	3.0	9.5	8.3	7.0	5.8	3.5
ET3 ❷	3.8	3.5	3.4	3.7	1.7	3.7	3.4	3.1	3.8	1.9
ET1 ❷	3.4	2.9	2.3	3.1	1.4	3.3	2.6	2.0	3.0	1.7
EDT (Nerit 1) ❸	–	–	–	–	1.8	–	–	–	–	1.8
Public Greek channels	**16.6**	**15.0**	**13.3**	**14.9**	**7.9**	**16.5**	**14.3**	**12.1**	**12.6**	**8.9**
Mega	19.8	20.5	20.0	21.5	20.0	21.0	21.6	22.4	26.4	21.3
Antenna 1	14.8	15.8	17.0	16.8	17.8	14.3	17.1	17.3	17.1	18.3
Alpha TV	12.7	11.9	13.1	12.0	13.9	14.5	14.9	14.9	13.2	13.2
Star	10.0	9.8	10.4	10.8	10.7	10.0	9.3	10.1	10.0	10.6
Skai		4.4	5.6	7.9	9.6		4.4	5.2	5.9	7.5
Makedonia TV (MAKTV)	0.4	0.7	0.5	0.6	0.8	0.5	1.3	0.6	0.7	1.2
Extra (formerly Extra 3)	0.4	0.4	0.3	0.0	0.7	0.8	0.8	0.7	0.0	1.7
E					0.4					0.4
Mad TV (Greece)	0.2	0.2	0.2	0.2	0.2	0.1	0.1	0.1	0.1	0.1
Novacinema1	0.1	~	~	0.1	0.2	0.1	~	~	0.1	0.2
Novasports1	0.1	~	~	0.1	0.2	0.1	~	~	0.2	0.3
Smile					0.1					0.1
Channel 9 (Athens)	0.2	0.1	~	0.0	~	0.1	0.1	~	0.0	~
Alter ❹	10.7	10.6	7.0	–	–	7.5	6.5	4.2	–	~
Main private Greek channels	**69.4**	**74.4**	**74.1**	**70.0**	**74.6**	**69.0**	**76.1**	**75.5**	**73.7**	**74.9**
Nickelodeon	~	~	0.9	1.2	1.3	~	~	0.5	0.8	0.7
Nickelodeon+					0.5					0.2
MTV	~	~	0.1	0.1	0.2	~	~	0.1	0.1	0.1
Foreign channels	**~**	**~**	**1.0**	**1.3**	**2.0**	**~**	**~**	**0.6**	**0.9**	**1.0**
Others/ Video	**14.0**	**10.6**	**11.6**	**13.8**	**15.5**	**14.5**	**9.6**	**11.8**	**12.8**	**15.2**

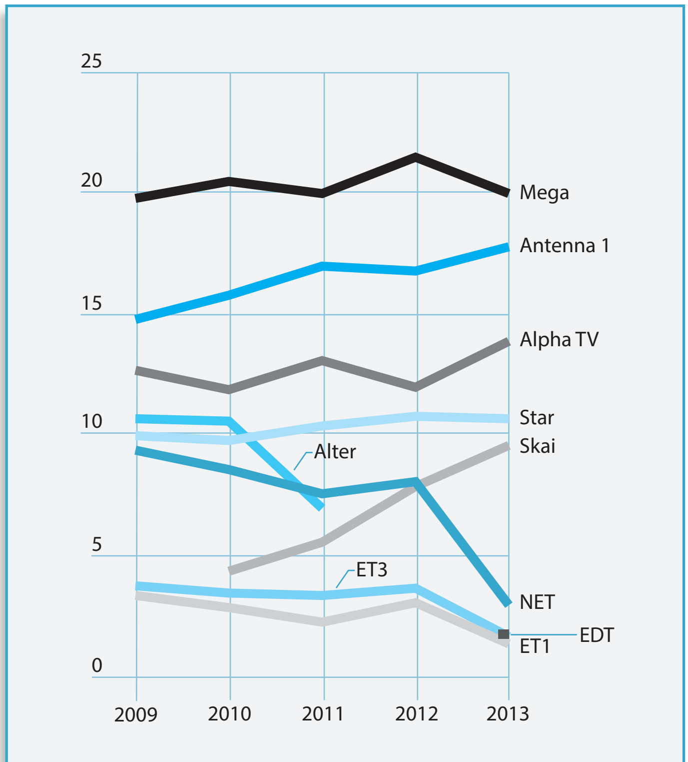
❶ Following a change in the definition of prime time by the local measurement institute, the market share of prime time is calculated on the basis of the time period 19:00 to 23:00 for 2012 and 21:00 to 24:00 for the previous years and for 2013.

❷ Following the closure of the public broadcasting company ERT, ET1, NET and ET3 ceased broadcasting on 11/06/2013.

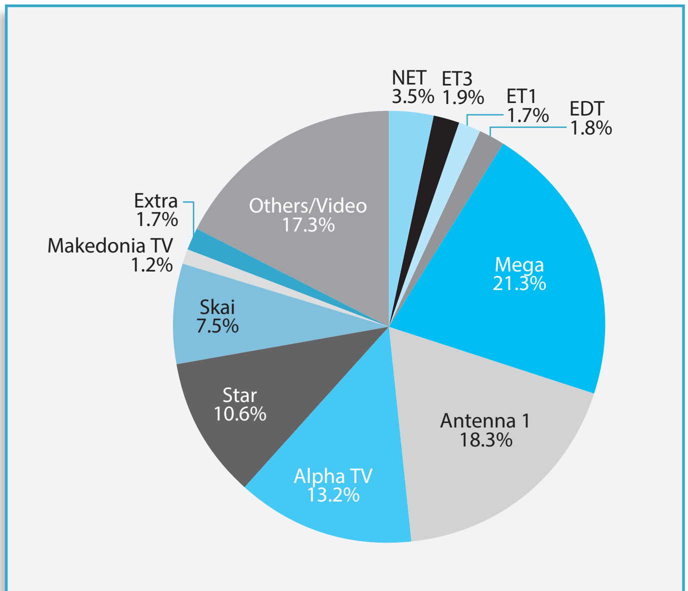
❸ EDT started as an interim public channel on 15/07/2013. The new channel Nerit 1 launched in 2014.

❹ ALTER ceased broadcasting in December 2011.

➥ Eurodata TV Worldwide / Nielsen Television Audience Measurement



2009-2013 Daily share. In %, 4 years +.



2013 Prime time (21:00-24:00). In %, 4 years +.

T.5.21 G.5.21

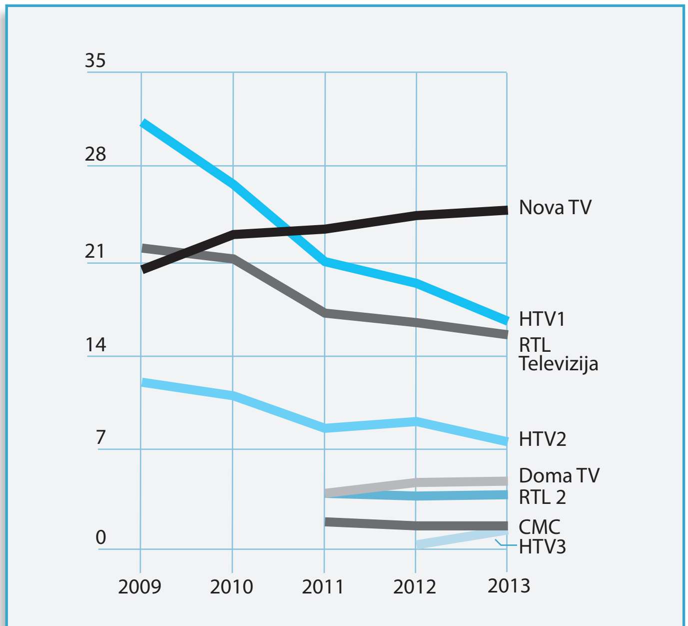
TV audience market share in Croatia

2009-2013 In %, 4 years +.

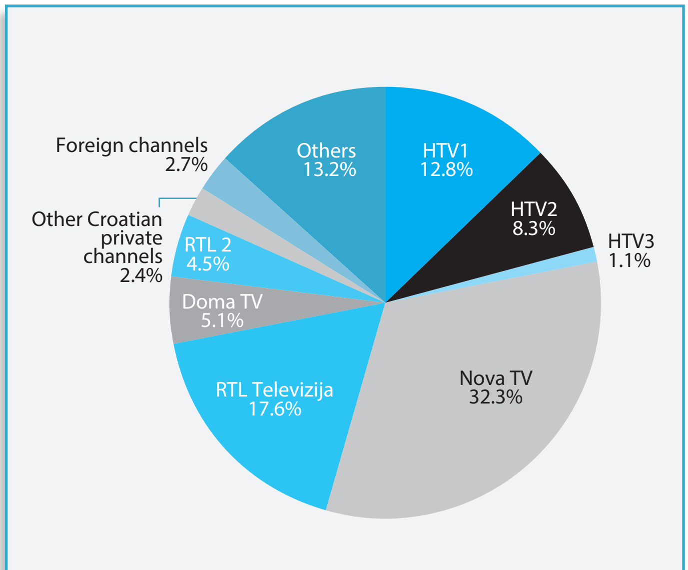
Channels	Daily share 2009	2010	2011	2012	2013	Prime time (19:30-22:00) ❹ 2009	2010	2011	2012	2013
HTV1	31.5	26.9	21.2	19.6	16.8	30.5	24.0	18.6	15.5	12.8
HTV2	12.3	11.3	8.9	9.4	7.9	12.9	11.7	8.9	9.7	8.3
HTV3	–	–	–	0.3	1.4	–	–	–	0.2	1.1
Public Croatian channels	**43.8**	**38.2**	**30.1**	**29.3**	**26.1**	**43.4**	**35.7**	**27.5**	**25.4**	**22.2**
Nova TV	20.6	23.2	23.6	24.6	25.0	26.1	29.1	32.6	33.7	32.3
RTL Televizija	22.2	21.4	17.4	16.7	15.8	20.5	22.2	17.8	18.2	17.6
Doma TV	–	–	4.1	4.9	5.0	–	–	3.4	4.2	5.1
RTL 2	–	–	4.1	3.9	4.0	–	–	3.4	3.8	4.5
CMC - Croatian Music Channel	–	–	2.0	1.7	1.7	–	–	0.5	0.7	0.9
Mreza TV	–	–	–	–	0.6	–	–	–	–	0.7
Sportska Televizija ❶	–	–	0.4	0.4	0.5	–	–	0.2	0.3	0.4
Klasik TV	–	–	–	–	0.3	–	–	–	–	0.2
24Sara TV ❷	–	–	–	–	0.1	–	–	–	–	0.1
RTL Plus	–	–	–	–	0.1	–	–	–	–	0.1
Kapital Network ❸	–	–	0.5	0.3	–	–	–	0.2	0.2	–
Main Croatian private channels	**42.8**	**44.6**	**52.1**	**52.5**	**53.1**	**46.6**	**51.3**	**58.1**	**61.1**	**61.9**
Nickelodeon	~	~	~	~	0.8	~	~	~	~	0.5
Fox	~	~	~	~	0.5	~	~	~	~	0.3
Fox Live	~	~	~	~	0.4	~	~	~	~	0.3
History Channel	~	~	~	~	0.4	~	~	~	~	0.2
National Geograhic	~	~	~	~	0.4	~	~	~	~	0.4
Fox Crime	~	~	~	~	0.2	~	~	~	~	0.2
Discovery Channel	~	~	~	~	0.3	~	~	~	~	0.2
Arena Sport 1	~	~	~	~	0.2	~	~	~	~	0.3
AXN	~	~	~	~	0.1	~	~	~	~	0.1
MTV Adria	~	~	~	~	0.1	~	~	~	~	0.1
Universal Channel	~	~	~	~	0.1	~	~	~	~	0.1
Foreign channels	**~**	**~**	**~**	**~**	**3.5**	**~**	**~**	**~**	**~**	**2.7**
Others	**13.4**	**17.2**	**17.8**	**18.2**	**17.3**	**10.0**	**13.0**	**14.4**	**13.5**	**13.2**

❶ The measurement of Sportska Televizija resumed on 01/02/2013.
❷ The measurement of 24Sata TV began on 01/03/2013.
❸ Lost national licence in September 2012.
❹ Prime time definition changed to 18:00-23:00 starting from 2013.

➥ Eurodata TV Worldwide / Nielsen Television Audience Measurement



2009-2013 Daily share. In %, 4 years +.



2013 Prime time (18:00-23:00). In %, 4 years +.

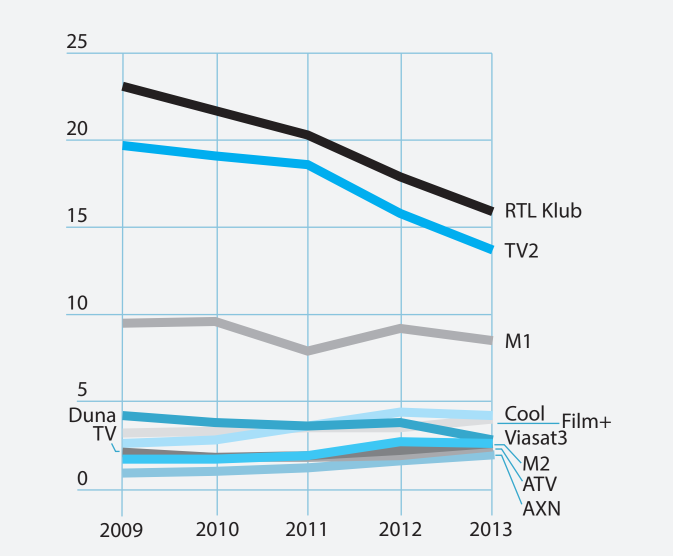
T.5.22
G.5.22

TV audience market share in Hungary

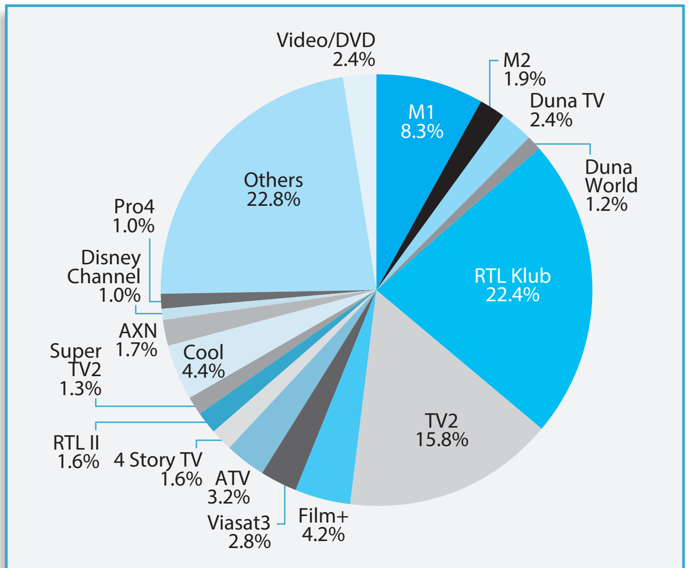
2009-2013 In %, 4 years +.

Channels	Daily share 2009	2010	2011	2012	2013	Prime time (19:00-23:00) 2009	2010	2011	2012	2013
M1	9.5	9.6	7.9	9.2	8.5	10.2	10.6	8.4	9.6	8.3
M2	2.1	1.8	1.9	2.2	2.6	2.0	1.7	1.7	2.3	1.9
Duna TV	2.0	1.8	1.8	1.9	2.4	1.2	1.2	1.2	1.5	2.4
Duna World				0.7	1.4				0.5	1.2
Public Hungarian channels	**13.6**	**13.2**	**11.6**	**14.0**	**14.9**	**13.4**	**13.5**	**11.3**	**13.9**	**13.8**
RTL Klub	23.1	21.7	20.3	17.9	15.9	29.3	27.5	27.9	24.5	22.4
TV2	19.7	19.1	18.6	15.8	13.7	20.8	21.5	19.5	18.2	15.8
Film+	3.2	3.3	3.5	3.5	4.0	3.3	3.2	3.5	3.7	4.2
Viasat3	4.2	3.8	3.6	3.8	2.8	3.8	3.4	3.3	3.2	2.8
ATV	1.7	1.7	1.9	2.7	2.6	2.5	2.5	2.7	3.3	3.2
4 Story TV	1.6	2.2	2.3	1.8	1.6	1.1	1.8	1.7	1.5	1.6
RTL II				0.2	1.5				0.1	1.6
Super TV2				0.1	1.3				0.0	1.3
Comedy Central	0.4	0.7	1.0	1.0	1.2	0.4	0.6	0.6	0.6	0.7
Muzsika TV			0.4	0.5	1.0			0.4	0.4	0.6
Sport1	0.8	0.7	0.7	0.7	0.8	0.8	0.7	0.7	0.7	0.9
Sorozat+			0.5	0.6	0.7			0.4	0.6	0.7
Spektrum	0.7	0.7	0.7	0.7	0.6	0.4	0.4	0.5	0.4	0.4
Film Mania (formerly Filmmuzeum)	0.3	0.4	0.4	0.6	0.6	0.3	0.4	0.4	0.6	0.6
TV Paprika	0.4	0.4	0.5	0.5	0.5	0.3	0.3	0.3	0.4	0.4
Life Network		0.1	0.4	0.4	0.5		0.1	0.4	0.3	0.5
Sport2	0.5	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.5
Viva	0.6	0.6	0.5	0.3	0.3	0.3	0.2	0.2	0.1	0.1
Echo TV	0.6	0.4	0.3	0.3	0.3	0.7	0.4	0.3	0.3	0.3
Ozone Network			0.2	0.2	0.3			0.1	0.2	0.2
Private Hungarian channels	**59.2**	**57.3**	**57.2**	**52.6**	**57.8**	**65.9**	**64.5**	**64.3**	**60.0**	**64.3**
Cool	2.6	2.8	3.6	4.4	4.2	3.2	3.2	4.1	4.7	4.4
AXN	0.9	1.0	1.2	1.6	1.9	0.9	0.9	1.2	1.6	1.7
Disney Channel	1.6	1.9	1.9	1.6	1.6	1.1	1.3	1.1	1.0	1.0
Minimax	1.3	1.4	1.3	1.3	1.2	0.7	0.6	0.4	0.3	0.3
Nickelodeon				0.4	1.1				0.3	0.8
Nota TV		0.3	1.0	1.1	1.0		0.1	0.6	0.7	0.7
Foreign channels	**11.1**	**13.0**	**16.5**	**18.8**	**19.9**	**8.8**	**9.6**	**13.1**	**15.2**	**15.9**
Others	**12.9**	**13.4**	**11.8**	**11.6**	**12.6**	**9.6**	**10.1**	**9.0**	**8.9**	**9.9**
Video / DVD	**3.2**	**3.1**	**2.9**	**3.0**	**3.1**	**2.3**	**2.3**	**2.3**	**2.3**	**2.4**

Eurodata TV Worldwide / Nielsen Television Audience Measurement



2009-2013 Daily share. In %, 4 years +.



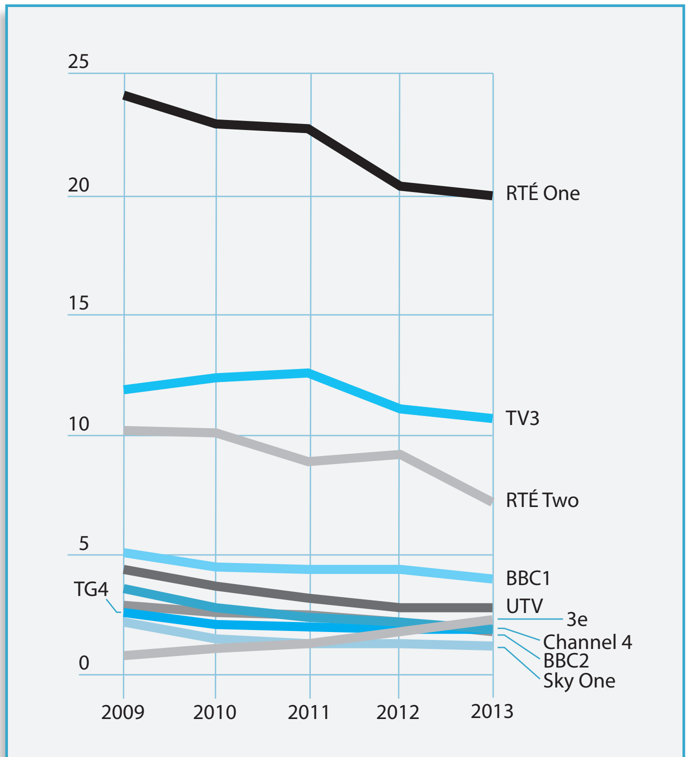
2013 Prime time (19:00-23:00). In %, 4 years +.

T.5.23 G.5.23 TV audience market share in Ireland

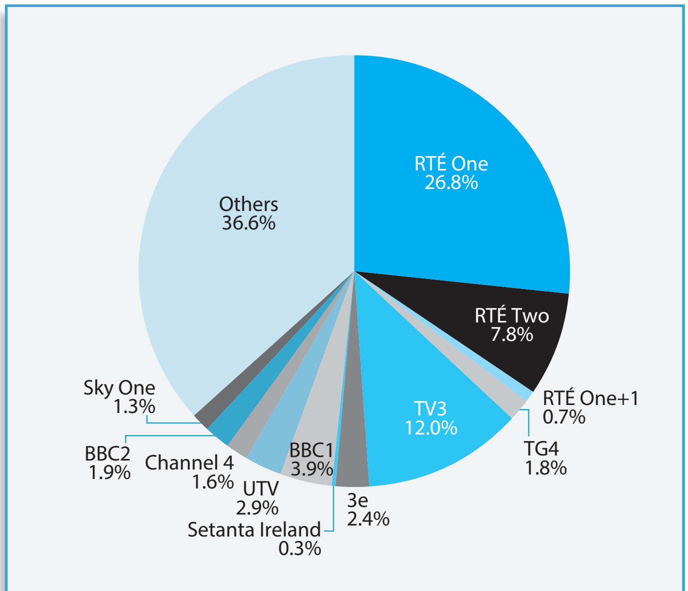
2009-2013 In %, 4 years +.

Channels	Daily share 2009	2010	2011	2012	2013	Prime time (18:00-23:29) 2009	2010	2011	2012	2013
RTÉ One	24.2	23.0	22.8	20.4	20.0	30.5	29.9	29.7	26.9	26.8
RTÉ Two	10.2	10.1	8.9	9.2	7.2	10.7	10.5	9.3	9.9	7.8
RTÉ One+1				0.2	0.5				0.3	0.7
TG4	2.6	2.1	2.0	1.9	1.9	2.3	2.0	1.8	1.7	1.8
Public Irish channels	**37.0**	**35.2**	**33.7**	**31.7**	**29.6**	**43.5**	**42.4**	**40.8**	**38.8**	**37.1**
TV3	11.9	12.4	12.6	11.1	10.7	12.8	13.5	13.5	12.2	12.0
3e	0.8	1.1	1.3	1.8	2.3	0.8	1.1	1.2	1.9	2.4
Setanta Ireland	0.9	0.4	0.4	0.3	0.3	0.8	0.4	0.3	0.3	0.3
Private Irish channels	**13.6**	**13.9**	**14.3**	**13.2**	**13.3**	**14.4**	**15.0**	**15.0**	**14.4**	
BBC1	5.1	4.5	4.4	4.4	4.0	4.8	4.3	4.2	4.6	3.9
UTV	4.4	3.7	3.2	2.8	2.8	4.3	3.8	3.2	2.9	2.9
Channel 4	3.6	2.8	2.4	2.2	1.9	3.3	2.6	2.2	2.0	1.6
BBC2	2.9	2.6	2.5	2.2	1.8	3.0	2.3	2.4	2.1	1.9
Sky One	2.2	1.5	1.3	1.3	1.2	2.0	1.5	1.5	1.4	1.3
Sky Sports News	0.5	0.6	0.7	0.7	0.8	0.4	0.4	0.5	0.4	0.5
Sky Sports 1	0.9	0.8	0.7	0.8	0.8	0.6	0.6	0.6	0.7	0.7
E4	1.2	1.0	0.8	0.9	0.8	1.0	0.9	0.7	0.9	0.8
Comedy Central	1.0	0.7	0.6	0.7	0.7	0.9	0.6	0.5	0.6	0.6
Sky News	1.1	0.8	0.9	0.7	0.7	0.7	0.5	0.5	0.4	0.4
Living TV	1.2	1.0	0.9	0.8	0.7	1.0	0.8	0.8	0.7	0.7
More4	~	~	~	~	0.7	~	~	~	~	0.7
Nick Jr	0.6	0.5	0.5	0.6	0.6	0.4	0.3	0.3	0.3	0.3
Discovery Ireland		0.5	0.5	0.5	0.5		0.4	0.4	0.5	0.5
Dave				0.2	0.5				0.2	0.5
Nicktoons				0.1	0.5				0.1	0.5
At the Races				0.4	0.5				0.2	0.2
Main foreign channels	**27.7**	**23.3**	**22.4**	**23.3**	**24.5**	**24.5**	**20.6**	**20.4**	**21.7**	**22.8**
Others	**21.7**	**27.6**	**29.6**	**31.8**	**32.6**	**17.6**	**22.0**	**23.8**	**25.1**	**40.1**

➡ Eurodata TV Worldwide / Nielsen Television Audience Measurement



2009-2013 Daily share. In %, 4 years +.



2013 Prime time (18:00-23:29). In %, 4 years +.

T.5.24
G.5.24

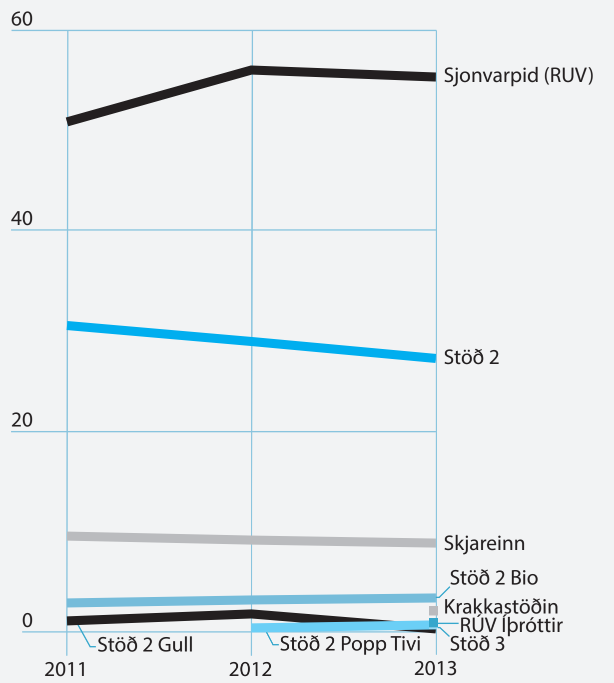
TV audience market share in Iceland

2011-2013 In %, 4 years +.

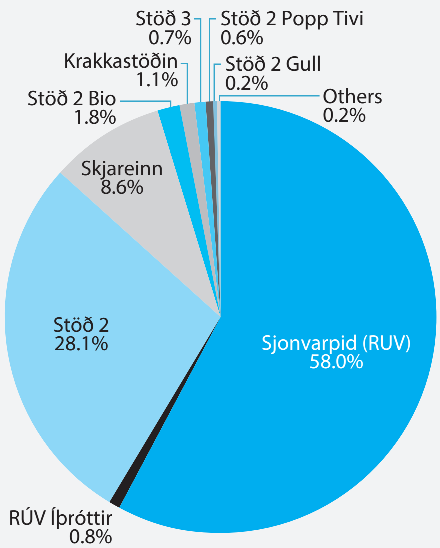
Channels	Daily share 2011	2012	2013	Prime time (18:00 - 23:00) 2011	2012	2013
Sjonvarpid (RUV)	51.1	56.3	55.6	54.2	57.3	58.0
RÚV Íþróttir ❶			0.9			0.8
Total public channels	**51.1**	**56.3**	**56.5**	**54.2**	**57.3**	**58.8**
Stöð 2	30.7	29.1	27.4	30.9	29.7	28.1
Skjareinn	9.6	9.2	8.9	9.4	9.6	8.6
Stöð 2 Bio (Movie)	2.9	3.2	3.4	1.5	1.7	1.8
Krakkastöðin ❷			2.1			1.1
Stöð 3 ❸			0.8			0.7
Stöð 2 Popp Tivi		0.4	0.7		0.4	0.6
Stöð 2 Gull ❷	1.1	1.8	0.3	0.8	1.2	0.2
Stöð 2 Sport	3.2	~	~	2.8	~	~
Stöð 2 Sport 2	1.3	~	~	0.4	~	~
Main private channels	**48.8**	**43.7**	**41.5**	**45.8**	**42.6**	**41.1**
Others	**0.1**	**0.0**	**2.0**	**0.0**	**0.1**	**0.1**

❶ The measurement of RÚV Íþróttir started on 01/01/2013.
❷ Krakkar/Gull were split into two channels on 25/09/2013: Krakkastöðin and Stöð 2 Gull.
❸ The measurement of Stöð 3 started on 07/09/2013.

➡ Eurodata TV Worldwide / Capacent Iceland



2011-2013 Daily share. In %, 4 years +.



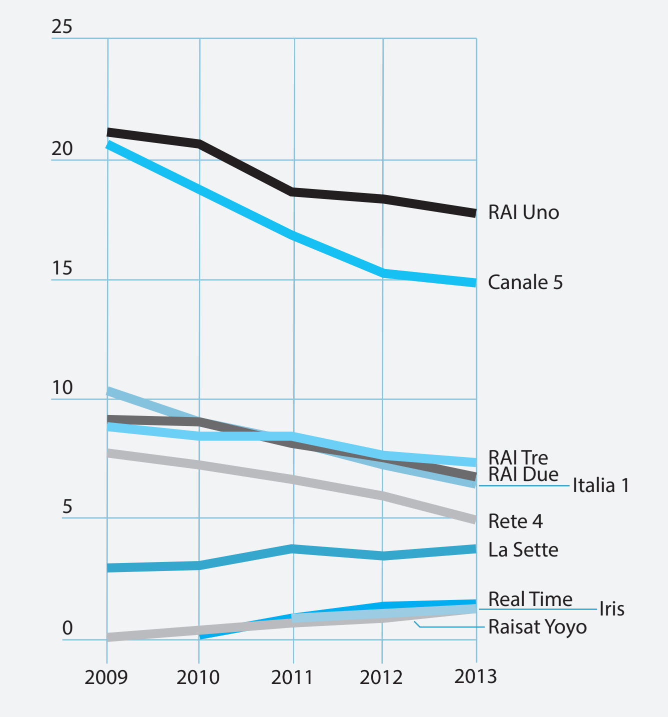
2013 Prime time (18:00-23:00). In %, 4 years +.

T.5.25
G.5.25

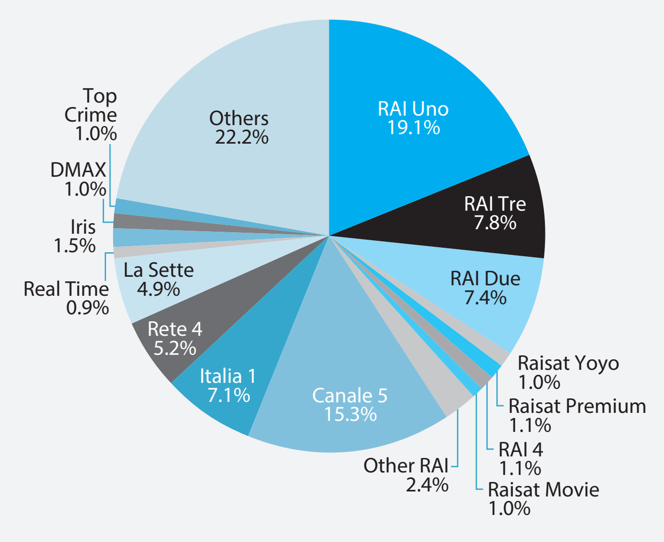
TV audience market share in Italy
2009-2013 In %, 4 years +.

Channels	Daily share 2009	2010	2011	2012	2013	Prime time (20:30-22:30) 2009	2010	2011	2012	2013
RAI Uno	21.2	20.7	18.7	18.4	17.8	22.4	22.4	18.9	19.5	19.1
RAI Tre	8.9	8.5	8.5	7.7	7.4	9.4	9.1	9.0	8.3	7.8
RAI Due	9.2	9.1	8.2	7.6	6.8	10.0	9.9	9.5	8.4	7.4
Raisat Yoyo	0.1	0.4	0.7	0.9	1.3	0.1	0.2	0.4	0.6	1.0
Raisat Premium	0.1	0.4	0.8	1.2	1.1	0.1	0.3	0.7	1.1	1.1
RAI 4	0.4	0.8	1.0	1.1	1.0	0.3	0.4	1.0	1.1	1.1
Raisat Movie	0.1	0.3	0.6	0.9	1.0	0.1	0.3	0.6	0.9	1.0
Other RAI	0.6	1.2	1.9	2.5	2.9	0.4	1.0	1.6	2.1	2.4
Italian main public channels	**40.7**	**41.3**	**40.2**	**39.9**	**38.7**	**42.9**	**43.5**	**41.4**	**41.5**	**40.3**
Canale 5	20.7	18.8	16.9	15.3	14.9	21.1	18.7	17.0	16.1	15.3
Italia 1	10.4	9.1	8.3	7.3	6.5	9.8	8.8	8.2	7.5	7.1
Rete 4	7.8	7.3	6.7	6.0	5.0	7.8	7.3	6.9	6.1	5.2
La Sette	3.0	3.1	3.8	3.5	3.8	2.6	3.0	4.6	4.0	4.9
Real Time		0.2	0.9	1.4	1.5		0.1	0.6	0.8	0.9
Iris			0.9	1.1	1.3			0.9	1.1	1.5
DMAX					1.3					1.0
Top Crime					1.0					1.0
Boing TV	0.7	1.1	1.2	1.0	0.8	0.5	0.9	0.8	0.8	0.6
La5		0.7	0.8	0.8	0.8		1.0	0.8	0.9	0.8
Mediaset Extra			0.7	0.7	0.8			0.6	0.5	0.7
Cielo			0.4	0.6	0.8			0.4	0.6	0.8
Giallo					0.8					0.6
Private Italian channels	**46.8**	**46.2**	**50.2**	**46.6**	**53.5**	**46.1**	**46.6**	**51.8**	**47.8**	**53.9**
Others	**12.5**	**12.5**	**9.6**	**13.5**	**7.8**	**11.0**	**9.9**	**6.8**	**10.7**	**5.8**

➥ Eurodata TV Worldwide / Auditel / Nielsen Television Audience Measurement



2009-2013 Daily share. In %, 4 years +.



2013 Prime time (20:30-22:30). In %, 4 years +.

T.5.26
G.5.26

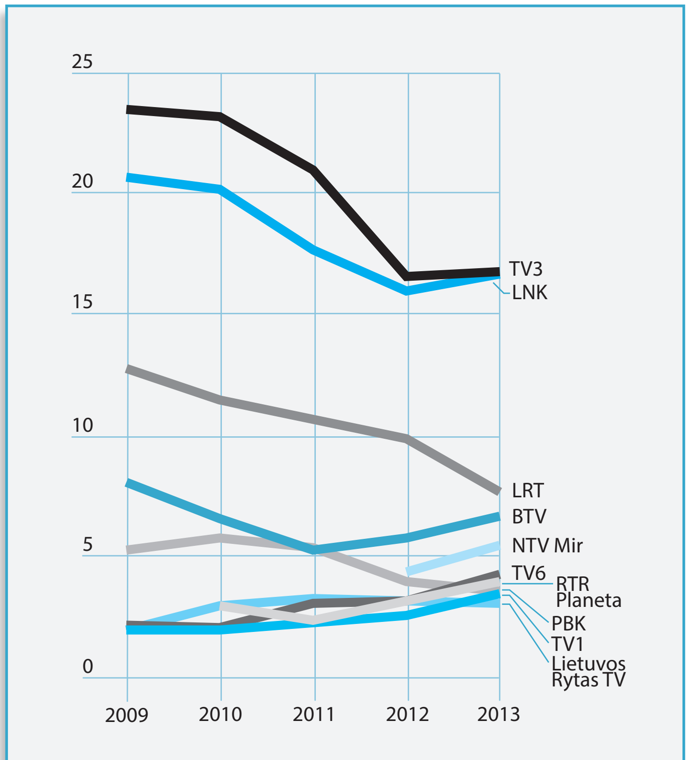
TV audience market share in Lithuania

2009-2013 In %, 4 years +.

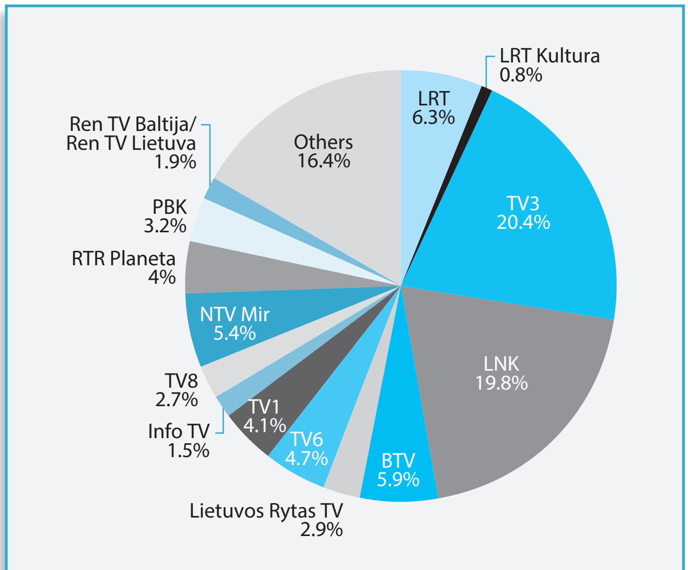
Channels	Daily share 2009	2010	2011	2012	2013	Prime time (18:00-22:00) 2009	2010	2011	2012	2013
LRT ❶	12.8	11.5	10.7	9.9	7.7	13.7	10.5	9.3	8.3	6.3
LRT Kultura ❶	0.9	0.6	0.6	0.7	1.0	1.0	0.4	0.5	0.5	0.8
Lithuanian public channels	**13.7**	**12.1**	**11.3**	**10.6**	**8.7**	**14.7**	**10.9**	**9.8**	**8.8**	**7.1**
TV3	23.5	23.2	21.0	16.6	16.8	26.3	26.5	24.0	19.4	20.4
LNK	20.7	20.2	17.7	16.0	16.7	24.9	25.6	22.5	20.5	19.8
BTV (Baltijos TV)	8.1	6.6	5.3	5.8	6.7	7.4	6.6	5.2	5.3	5.9
Lietuvos Rytas TV (ex 5 Kanalas)	2.0	3.0	3.3	3.2	3.1	2.0	2.9	3.0	3.0	2.9
TV6 (ex Tango TV)	2.2	2.1	3.1	3.2	4.3	1.9	1.7	2.9	3.5	4.7
TV1	2.0	2.0	2.3	2.6	3.5	1.5	1.8	2.4	2.9	4.1
Info TV		0.2	0.4	1.1	2.3		0.1	0.2	0.8	1.5
Liuks!		0.3	0.4	0.7	0.8		0.2	0.2	0.5	0.5
TV8				0.5	1.9				0.7	2.7
Sport 1		0.3	0.3	–	–		0.3	0.3	–	–
Lithuanian private channels	**58.5**	**57.9**	**53.8**	**49.7**	**56.1**	**64.0**	**65.7**	**60.7**	**56.6**	**62.5**
NTV Mir				4.4	5.5				4.2	5.4
RTR Planeta		3.0	2.4	~	4.0		2.8	2.2	~	4.0
PBK	5.3	5.8	5.4	4.0	3.6	4.6	4.6	4.4	3.5	3.2
Ren TV Baltija / Ren TV Lietuva		1.4	1.7	2.3	2.6		0.9	1.2	1.8	1.9
Viasat Sport Baltic		0.3	0.3	0.2	~		0.4	0.3	0.2	~
MTV Lithuania	0.3	0.2	0.2	–	–	0.2	0.1	0.1	–	–
Main foreign channels	**5.6**	**10.7**	**10.0**	**10.9**	**15.7**	**4.8**	**8.8**	**8.2**	**9.7**	**14.5**
Others	**20.1**	**18.0**	**24.9**	**28.8**	**19.5**	**14.8**	**13.5**	**21.3**	**24.9**	**15.9**
Video	**2.1**	**1.3**	**~**	**~**	**~**	**1.7**	**1.1**	**~**	**~**	**~**

❶ LTV was renamed as LRT Televizija and LTV2 was renamed as LRT Kultura end of July 2012.

➥ Eurodata TV Worldwide / TNS LT



2009-2013 Daily share. In %, 4 years +.



2013 Prime time (18:00-22:00). In %, 4 years +.

T.5.27
G.5.27

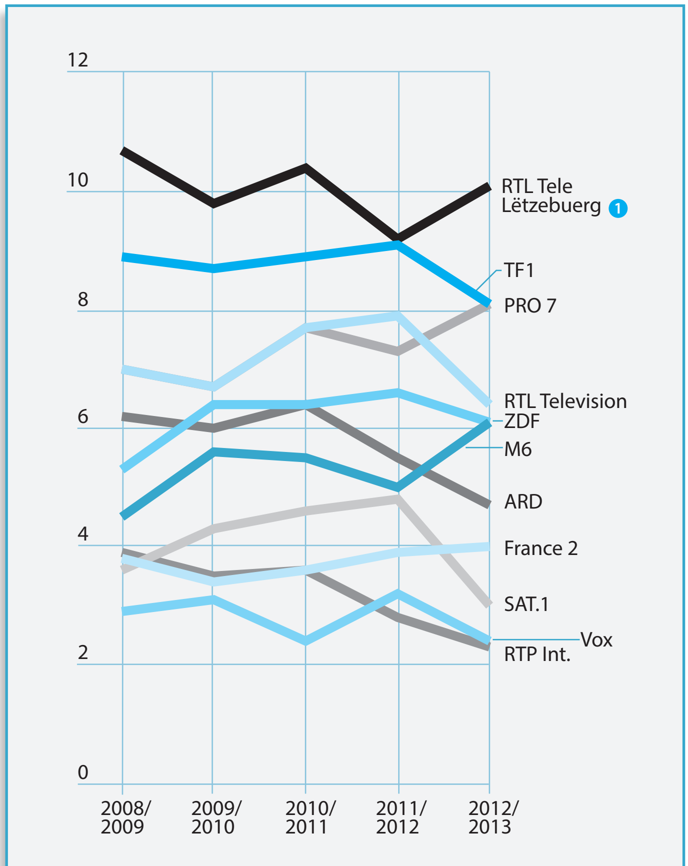
TV audience market share in Luxembourg

2009-2013 In %, 12 years +.

Channels	Daily share 2008 /2009	2009 /2010	2010 /2011	2011 /2012	2012 /2013	Timeslot 19:00-20:00 2008 /2009	2009 /2010	2010 /2011	2011 /2012	2012 /2013
RTL Tele Lëtzebuerg [1]	10.7	9.8	10.4	9.2	10.1	39	37.3	34.7	35.4	34.2
TF1	8.9	8.7	8.9	9.1	8.1	7	8.3	7.1	7.6	5.8
RTL Television	7.0	6.7	7.7	7.9	6.4	6.9	6.1	7.3	6.5	7.6
PRO 7	7.0	6.7	7.7	7.3	8.1	5.2	4.8	6.7	6.6	5.8
ZDF	5.3	6.4	6.4	6.6	6.1	2.8	6.8	4.1	4.8	3.2
ARD	6.2	6.0	6.4	5.5	4.7	2.6	6	2.7	2	2.1
M6	4.5	5.6	5.5	5.0	6.1	3.4	5.2	4	2.8	5.2
SAT.1	3.6	4.3	4.6	4.8	3.0	1.7	3.8	3.3	2.2	1.2
France 2	3.8	3.4	3.6	3.9	4.0	1.9	3	2.2	2.9	1.7
Vox	2.9	3.1	2.4	3.2	2.4	~	3.4	~	2.8	3.2
RTP Int.	3.9	3.5	3.6	2.8	2.3	2.7	3	2.3	2.1	0.9
RTL-TVi	1.2	2.1	1.5	2.4	3.2	~	2.4	2.3	~	~
Others	**35.0**	**33.7**	**31.3**	**34.7**	**35.8**	**26.8**	**9.9**	**23.2**	**24.2**	**28.5**

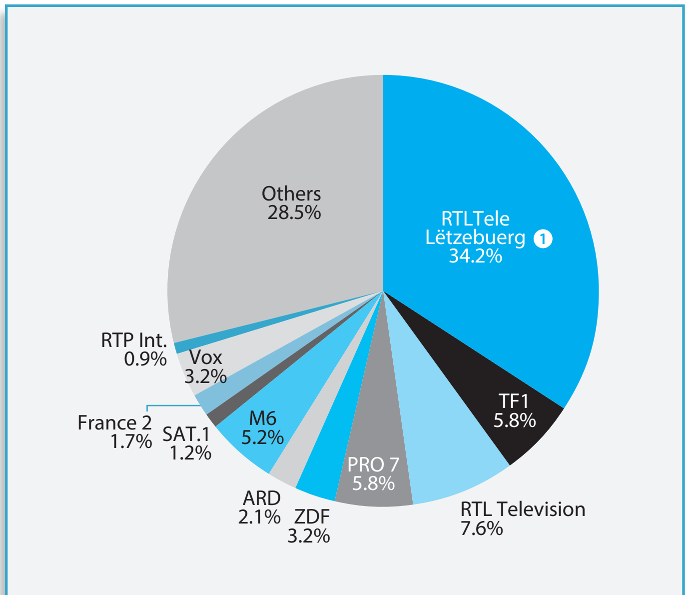
[1] Including DEN 2 RTL in 2010/2011 and 2011/2012.

TNS-ILRes Plurimedia / IP Key Facts



2009-2013 Daily share. In %, 12 years +.

[1] Including DEN 2 RTL in 2010/2011 and 2011/2012.



2013 Timeslot 19:00-20:00. In %, 12 years +.

[1] Including DEN 2 RTL.

T.5.28 G.5.28

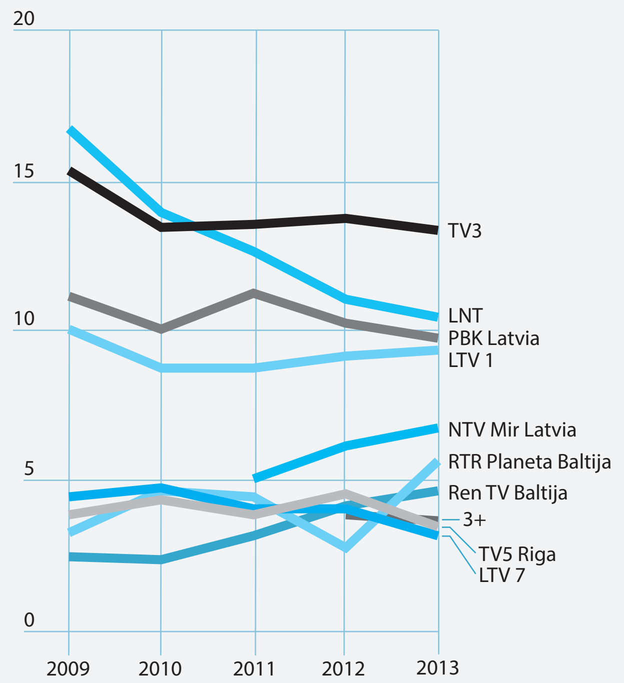
TV audience market share in Latvia

2009-2013 In %, 4 years +.

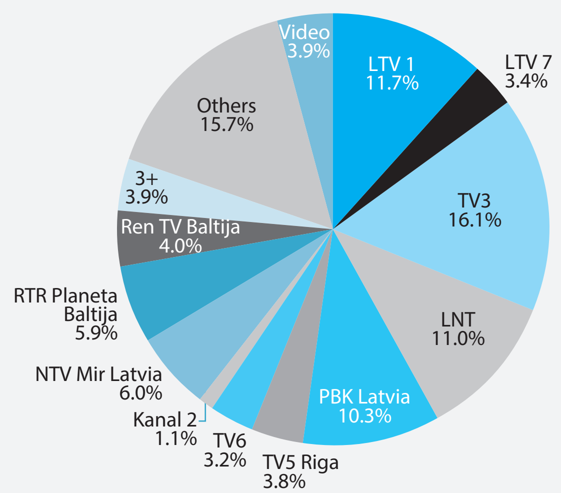
Channels	Daily share 2009	2010	2011	2012	2013	Prime time (19:00-22:00) ❶ 2009	2010	2011	2012	2013
LTV 1	10.1	8.8	8.8	9.2	9.4	12.2	10.3	10.7	11.4	11.7
LTV 7	4.5	4.8	4.1	4.1	3.2	4.9	5.1	4.8	3.8	3.4
Latvian public channels	**14.6**	**13.6**	**12.9**	**13.3**	**12.6**	**17.1**	**15.4**	**15.5**	**15.2**	**15.1**
TV3	15.4	13.5	13.6	13.8	13.4	17.5	17.2	17.7	18.1	16.1
LNT	16.8	14.0	12.7	11.1	10.5	18.8	16.1	14.6	12.8	11.0
Perviy Baltiysky Kanal Latvia	11.2	10.1	11.3	10.3	9.8	11.7	9.7	10.8	10.4	10.3
TV5 Riga	3.9	4.4	3.9	4.6	3.5	4.3	4.2	3.7	4.2	3.8
TV6	0.9	2.0	2.5	2.9	2.9	0.9	2.4	2.8	3.2	3.2
Kanal 2				1.1	1.0				1.0	1.1
Main Latvian private channels	**48.2**	**44.0**	**44.0**	**43.8**	**41.1**	**53.2**	**49.6**	**49.6**	**49.7**	**45.5**
NTV Mir Latvia			5.1	6.2	6.8			4.7	5.8	6.0
RTR Planeta Baltija	3.3	4.7	4.5	2.8	5.7	3.2	5.0	4.4	3.1	5.9
Ren TV Baltija	2.5	2.4	3.2	4.2	4.7	2.2	2.1	2.7	3.6	4.0
3+ (Version in Latvian)				3.9	3.7				4.0	3.9
1BM (formerly PBMK)	0.5	0.5	~	0.7	0.6	0.2	0.2	~	0.4	0.4
National Geographic			0.6	0.6	0.5			0.3	0.3	0.3
Fox (formerly Fox Crime)			0.5	0.5	0.5			0.3	0.3	0.4
CTC				0.3	0.5				0.2	0.3
Fox Life			0.1	0.2	0.2			0.1	0.1	0.1
MTV Latvija	–	–	–	–	–	–	–	–	–	–
Main foreign channels	**6.3**	**7.6**	**14.0**	**19.4**	**23.2**	**5.6**	**7.3**	**12.5**	**17.8**	**21.3**
Others	**28.8**	**32.2**	**29.1**	**20.9**	**19.0**	**22.4**	**25.7**	**20.6**	**15.1**	**14.2**
Video	**2.1**	**2.6**	**~**	**2.7**	**4.2**	**1.7**	**2.0**	**1.8**	**2.1**	**3.9**

❶ Prime time definition changed to 18:00-23:00 starting from 2013.

➡ Eurodata TV Worldwide / TNS Latvia / Kantar Media (TV Meters Survey)



2009-2013 Daily share. In %, 4 years +.



2013 Prime time (18:00-23:00). In %, 4 years +.

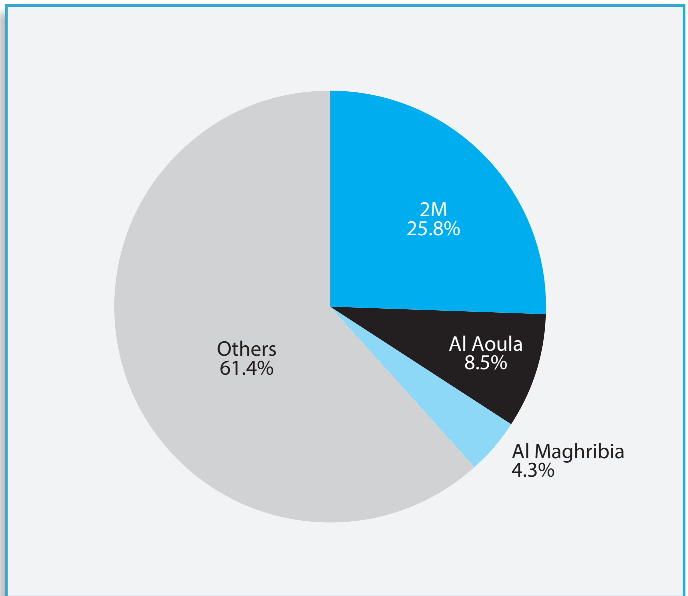
T.5.29
G.5.29

TV audience market share in Morocco

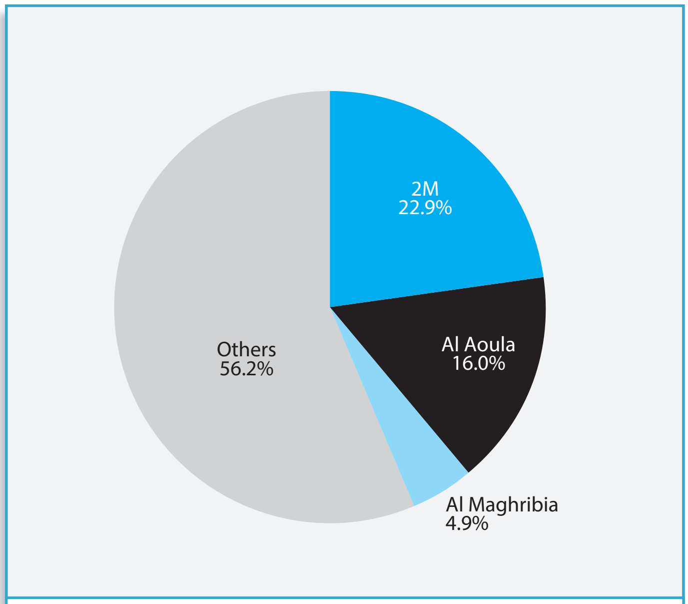
2013 In %, 5 years +.

Channels	Daily share 2013	Prime time (20:50 - 22:30) 2013
2M	25.8	22.9
Al Aoula	8.5	16.0
Al Maghribia	4.3	4.9
Others	**61.4**	**56.2**

➡ Eurodata TV Worldwide, Marocmétrie - CIAUMED



2013 Daily share. In %, 5 years +.



2013 Prime time (20:50-22:30). In %, 5 years +.

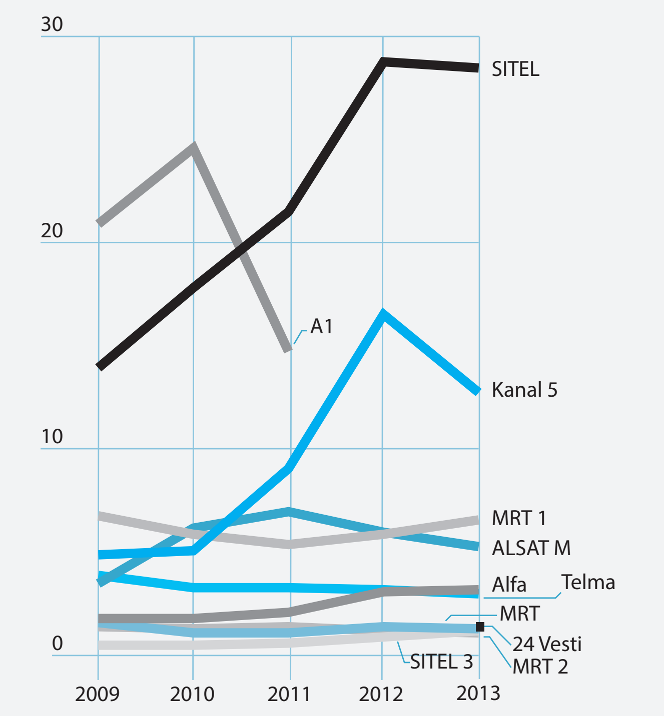
T.5.30 G.5.30

TV audience market share in 'the Former Yugoslav Republic of Macedonia' 2009-2013 In %, 4 years +.

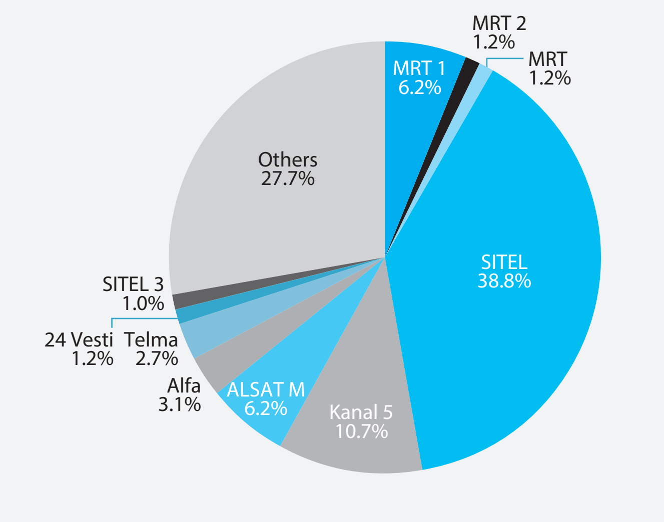
Channels	Daily share 2009	2010	2011	2012	2013	Prime time (17:00-23:00) 2009	2010	2011	2012	2013 (3)
MRT 1	6.8	5.9	5.4	5.9	6.6	5.8	5.0	4.5	5.4	6.2
MRT 2	1.4	1.3	1.4	1.2	1.1	1.5	1.2	1.3	1.2	1.2
MRT (former MTV 3)	1.6	1.1	1.1	1.4	1.3	1.4	0.8	1.0	1.2	1.2
Public channels	**9.8**	**8.3**	**7.9**	**8.5**	**9.0**	**8.7**	**7.0**	**6.8**	**7.8**	**8.6**
SITEL	14.0	17.9	21.6	28.9	28.6	15.7	20.5	24.9	35.2	38.8
Kanal 5	4.9	5.1	9.1	16.6	12.8	5.0	4.8	9.0	17.2	10.7
ALSAT M	3.5	6.2	7.0	6.0	5.3	4.0	7.4	8.5	7.0	6.2
Alfa	1.8	1.8	2.1	3.1	3.2	1.5	1.6	2.2	3.2	3.1
Telma	3.9	3.3	3.3	3.2	3.0	3.6	2.8	3.2	3.2	2.7
24 Vesti					1.4					1.2
SITEL 3	0.5	0.5	0.6	0.9	1.2	0.3	0.3	0.6	0.8	1.0
Kanal5+			0.6	1.1	1.1			~	0.8	0.8
ERA	1.6	1.6	1.0	0.7	0.5	1.8	1.5	0.8	0.6	0.4
SKY NET	0.4	0.3	0.2	0.2	0.2	0.3	0.2	0.1	0.1	0.2
MTM	0.3	0.2	0.2	0.2	0.2	0.2	0.1	0.2	0.1	0.1
A2	1.4	0.9	0.7	0.1	~	1.2	0.7	0.6	0.1	~
Pink 15 (1)	0.3	0.1	~	0.7	–	0.2	0.1	~	0.5	–
A1 (2)	21.0	24.7	14.8	–	–	26.0	31.2	18.8	–	–
Main private channels	**53.6**	**62.6**	**61.2**	**61.7**	**57.5**	**59.8**	**71.2**	**68.9**	**68.8**	**65.2**
Others	**36.6**	**29.1**	**30.9**	**29.8**	**33.5**	**31.5**	**21.8**	**24.3**	**23.4**	**26.2**

(1) Pink 15 was closed on 11/05/2012.
(2) A1 ceased broadcasting on 31/07/2011.
(3) Prime time definition changed to 19:00-23:00.

➥ Eurodata TV Worldwide / Nielsen Television Audience Measurement



2009-2013 Daily share. In %, 4 years +.



2013 Prime time (19:00-23:00). In %, 4 years +.

T.5.31
G.5.31

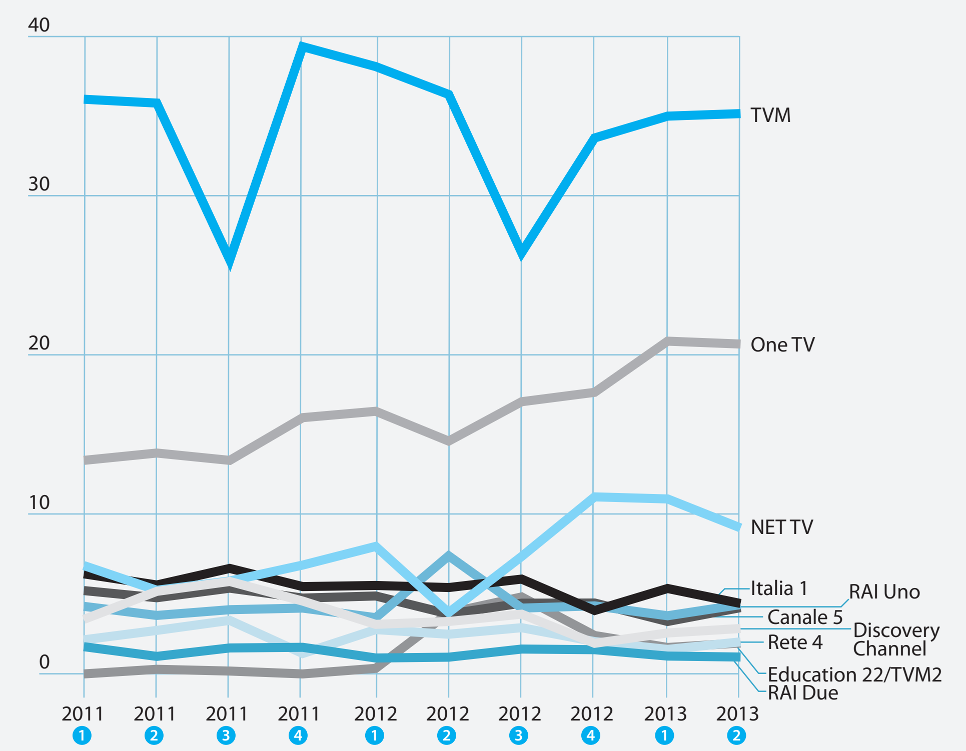
Reach by TV channel by quarter in Malta

2011-2013 Daily share. In %, 12 years +.

Channels	Daily share ❶ 2011	❷ 2011	❸ 2011	❹ 2011	❶ 2012	❷ 2012	❸ 2012	❹ 2012	❶ 2013	❷ 2013
TVM	36.1	35.8	26.0	39.4	38.1	36.4	26.4	33.6	35.0	35.2
One TV	13.4	13.9	13.4	16.1	16.5	14.6	17.1	17.7	20.9	20.7
NET TV	6.8	5.3	5.8	6.8	8.0	3.9	7.4	11.1	11.0	9.2
Smash TV	0.3	0.2	0.8	0.0	0.0	0.1	0.4	0.8	0.5	0.6
Education 22/TVM2	0.0	0.3	0.2	0.0	0.4	3.8	4.8	2.4	1.7	1.9
Favourite Channel	0.2	0.3	0.9	0.8	0.1	0.4	0.4	0.6	0.2	0.1
Calypso Music TV	0.0	0.2	0.1	0.0	0.0	0.1		0.3	0.3	0.5
ITV	0.0	0.0	0.1	0.2	0.2	0.1	0.1	0.3	0.1	0.2
Prime TV				0.1	0.0	0.2		0.1		0.1
Maltese private channels	**20.7**	**20.1**	**21.2**	**23.9**	**25.1**	**23.2**	**30.2**	**33.1**	**34.6**	**33.3**
RAI Uno	4.2	3.7	4.0	4.1	3.5	7.4	4.1	4.3	3.7	4.4
RAI Due	1.7	1.1	1.6	1.7	1.0	1.1	1.6	1.5	1.1	1.1
RAI Tre	0.4	0.4	0.1	0.1	0.1	0.4	0.6	0.8	0.3	0.4
Rete 4	2.1	2.7	3.4	1.3	2.8	2.5	2.9	2.0	1.5	2.0
Canale 5	5.2	4.8	5.4	4.8	4.9	3.8	4.4	4.5	3.3	4.2
Italia 1	6.3	5.6	6.6	5.5	5.6	5.4	6.0	4.0	5.4	4.4
Discovery Channel	3.4	5.2	5.8	4.6	3.1	3.3	3.8	1.9	2.6	2.9
MTV	0.9	1.3	1.7	0.6	0.4	0.9	0.6	0.9	0.6	0.4
BBC Prime/ World/ Entertainment	2.1	2.5	3.1	1.6	1.2	1.8	1.3	1.1	1.2	1.0
Others	**16.9**	**16.9**	**21.1**	**12.9**	**14.1**	**14.0**	**18.2**	**12.2**	**10.7**	**10.9**
Foreign channels	**43.3**	**44.1**	**52.8**	**37.0**	**36.8**	**40.5**	**43.4**	**33.2**	**30.4**	**31.5**

❶ January-March.
❷ April-June.
❸ July-September.
❹ October-December.

➡ Independent Broadcasting Authority



2011-2013 Daily share. In %, 12 years +.

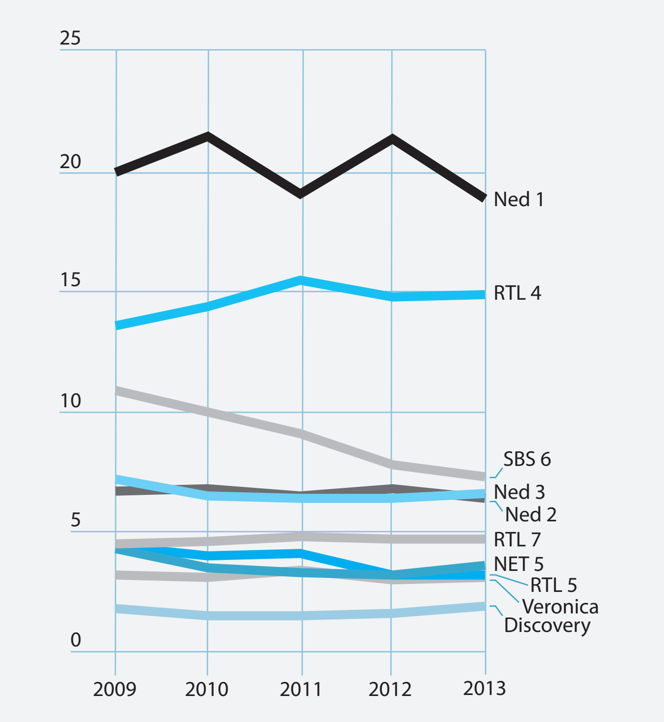
T.5.32
G.5.32

TV audience market share in the Netherlands

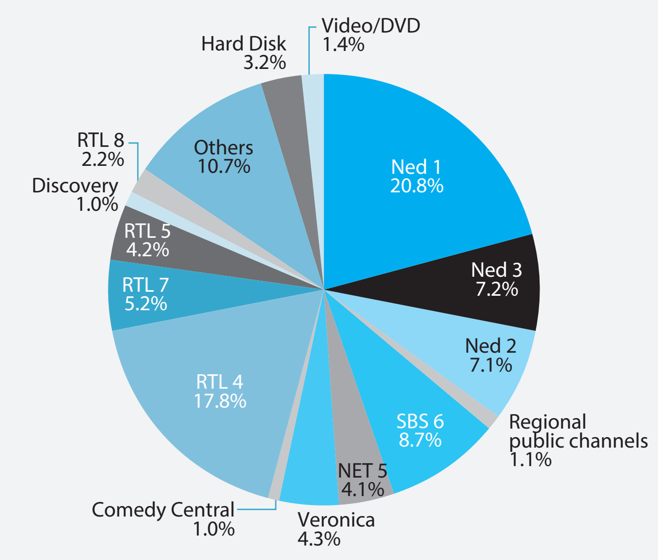
2009-2013 In %, 6 years +.

Channels	Daily share 2009	2010	2011	2012	2013	Prime time (18:00-24:00) 2009	2010	2011	2012	2013
Ned 1	20.0	21.5	19.1	21.4	18.9	21.9	23.3	20.8	23.5	20.8
Ned 3	7.2	6.5	6.4	6.4	6.6	8.0	7.0	6.9	6.9	7.2
Ned 2	6.7	6.8	6.5	6.8	6.4	6.9	7.3	6.7	7.3	7.1
Main Dutch public channels	**33.9**	**34.8**	**32.0**	**34.6**	**31.9**	**36.8**	**37.6**	**34.4**	**37.7**	**35.1**
Regional public channels	**1.8**	**1.7**	**1.7**	**1.7**	**1.7**	**1.4**	**1.3**	**1.2**	**1.2**	**1.1**
SBS 6	10.9	10.0	9.1	7.8	7.3	12.6	11.3	10.6	9.1	8.7
NET 5	4.3	3.5	3.3	3.2	3.6	4.7	4.0	3.9	3.6	4.1
Veronica (ex V8/FOX8)	3.2	3.1	3.4	3.0	3.1	4.3	4.4	4.8	4.3	4.3
Comedy Central (ex The Box)	1.0	1.0	1.2	1.4	1.7	0.9	0.8	0.9	0.9	1.0
MTV (Netherlands)	0.8	0.8	0.7	0.7	0.9	0.4	0.4	0.4	0.4	0.5
Disney Channel			0.4	0.6	0.6			0.2	0.3	0.2
24 Kitchen				0.4	0.4				0.2	0.2
Main Dutch private channels	**21.1**	**19.0**	**18.9**	**17.8**	**18.0**	**23.4**	**21.3**	**21.1**	**19.1**	**19.3**
RTL 4	13.6	14.4	15.5	14.8	14.9	15.1	16.2	17.6	17.3	17.8
RTL 7	4.5	4.6	4.8	4.7	4.7	4.6	4.9	5.1	5.0	5.2
RTL 5	4.4	4.0	4.1	3.2	3.2	5.5	5.0	5.2	4.1	4.2
Discovery	1.8	1.5	1.5	1.6	1.9	1.0	0.7	0.8	0.8	1.0
RTL 8	1.7	1.7	1.8	1.7	1.8	2.2	2.2	2.3	2.0	2.2
Nickelodeon Nederland	2.1	1.8	1.8	1.8	1.6	0.8	0.7	0.7	0.8	0.7
The Learning Channel			0.4	0.5	1.5			0.4	0.5	0.7
National Geographic Channel Nederland	0.8	1.1	1.2	1.1	1.2	0.5	0.6	0.7	0.6	0.6
Jetix / Disney XD	1.6	1.6	1.4	1.3	1.0	0.0	0.0	0.0	0.1	0.1
Één (VRT)	1.3	1.1	1.3	1.2	1.0	0.8	0.8	1.0	0.9	0.7
Main foreign channels	**34.6**	**34.4**	**36.1**	**35.6**	**38.8**	**32.3**	**32.8**	**35.3**	**34.6**	**37.1**
Hard Disk			2.7	3.4	3.9			2.1	2.6	3.2
Video / DVD			**2.3**	**2.1**	**1.6**			**1.8**	**1.7**	**1.4**
Video / Others	**10.4**	**11.8**	**13.0**	**12.0**	**11.3**	**7.5**	**8.3**	**9.2**	**8.6**	**8.5**

➥ Eurodata TV Worldwide / Stichting Kijkonderzoek



2009-2013 Daily share. In %, 6 years +.



2013 Prime time (18:00-24:00). In %, 6 years +.

T.5.33
G.5.33

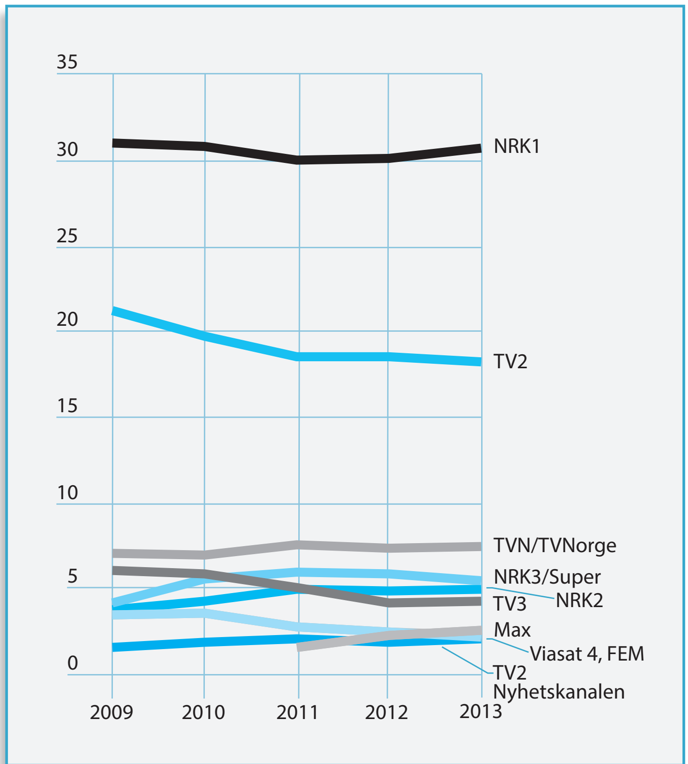
TV audience market share in Norway

2009-2013 In %, 2 years +.

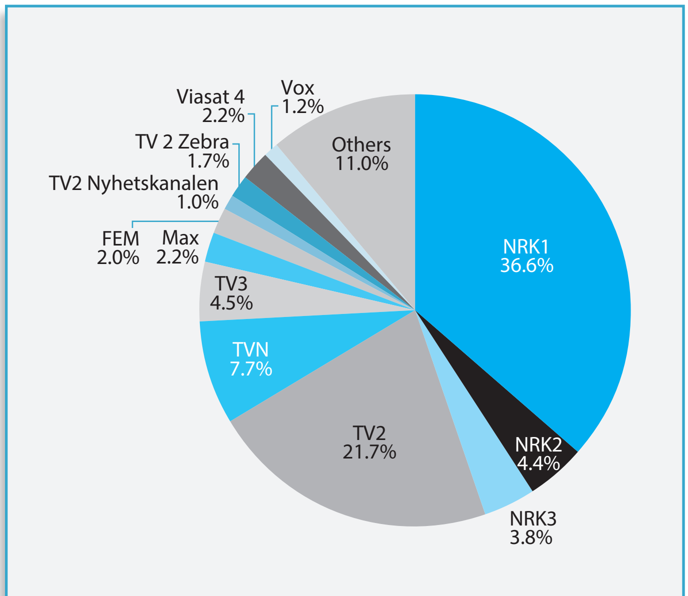
Channels	Daily share 2009	2010	2011	2012	2013	Prime time (19:00-23:00) 2009	2010	2011	2012	2013 [1]
NRK1	31.1	30.9	30.1	30.2	30.8	38.2	38.0	36.4	37.3	36.6
NRK2	3.8	4.3	5.0	4.9	5.0	3.4	4.1	4.4	4.2	4.4
NRK3/Super	4.2	5.6	6.0	5.9	5.5	2.9	3.8	3.8	3.6	3.8
Norwegian public channels	**39.1**	**40.8**	**41.1**	**41.0**	**41.3**	**44.5**	**45.9**	**44.6**	**45.1**	**44.8**
TV2	21.3	19.8	18.6	18.6	18.3	23.6	22.7	22.3	22.2	21.7
TVN / TVNorge	7.1	7.0	7.6	7.4	7.5	7.7	7.7	8.5	7.9	7.7
TV3	6.1	5.9	5.1	4.2	4.3	6.0	5.7	5.1	4.5	4.5
Max			1.6	2.3	2.6			1.5	2.1	2.2
FEM	3.5	3.6	2.8	2.5	2.2		2.0	1.7	1.8	2.0
TV2 Nyhetskanalen	1.6	1.9	2.1	1.9	2.1	0.8	0.9	1.0	0.8	1.0
TV 2 Zebra	3.1	2.8	2.6	2.2	1.8	3.2	2.4	2.2	2.1	1.7
TV2 Bliss		0.2	1.3	1.2	1.1		0.2	1.1	0.8	0.9
Norwegian private channels	**43.6**	**41.8**	**42.8**	**41.2**	**40.7**	**41.9**	**42.1**	**44.1**	**42.8**	**42.3**
Viasat 4	3.5	3.6	2.8	2.5	2.3	3.0	3.3	2.6	2.3	2.2
Disney Channel	2.8	2.3	2.0	2.1	1.8	1.3	1.0	0.9	1.0	0.8
Vox (former Voice TV)		0.4	0.4	1.0	1.3		0.2	0.2	0.8	1.2
Discovery	1.7	1.5	1.3	1.5	1.2	1.1	1.0	1.0	1.0	0.9
TLC Norge		0.5	0.9	1.0	1.1		0.3	0.7	0.7	0.8
Main foreign channels	**12.6**	**13.6**	**15.4**	**17.7**	**17.9**	**8.1**	**8.5**	**10.3**	**11.3**	**12.3**
Others	**4.7**	**3.8**	**0.7**	**0.1**	**0.1**	**5.5**	**3.5**	**1.0**	**0.8**	**0.6**

[1] Prime time definition changed to 18:30-23:30 starting from 2013.

Eurodata TV Worldwide / TNS Gallup



2009-2013 Daily share. In %, 2 years +.



2013 Prime time (18:30-23:30). In %, 2 years +.

T.5.34 G.5.34 TV audience market share in Poland

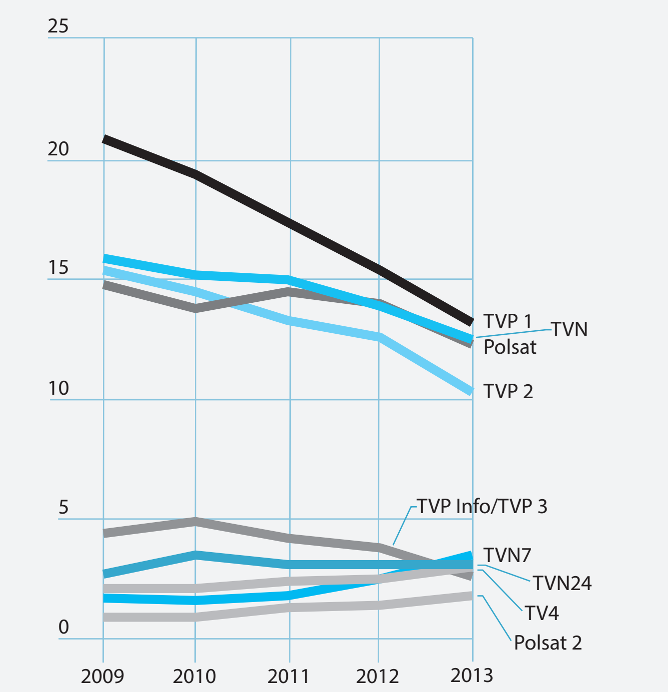
2009-2013 In %, 4 years +.

Channels	Daily share 2009	2010	2011	2012	2013	Prime time (18:30-22:30) ❷ 2009	2010	2011	2012	2013
TVP 1	20.9	19.4	17.4	15.4	13.2	21.0	20.8	18.8	17.9	15.4
TVP 2	15.4	14.5	13.3	12.6	10.3	18.0	17.1	15.4	14.9	13.4
TVP Info/TVP 3 ❶	4.4	4.9	4.2	3.8	2.6	3.3	3.4	3.4	3.0	2.1
TVP Seriale			0.3	0.6	1.1			0.3	0.6	1.1
TVP Polonia	0.7	0.6	0.7	0.6	0.7	0.6	0.5	0.6	0.4	0.5
Polish public channels	**42.5**	**40.8**	**36.5**	**34.2**	**30.0**	**43.9**	**43.1**	**39.1**	**38.0**	**34.3**
TVN	15.9	15.2	15.0	13.9	12.5	19.7	19.1	18.6	17.0	14.9
Polsat	14.8	13.8	14.5	14.0	12.3	16.0	14.6	15.1	15.1	13.6
TVN7	1.7	1.6	1.8	2.5	3.5	1.6	1.6	1.9	2.3	2.7
TVN24	2.7	3.5	3.1	3.1	3.1	1.8	2.4	2.2	2.0	2.1
TV4	2.1	2.1	2.4	2.5	3.0	2.2	2.4	2.6	2.6	3.0
Polsat 2	0.9	0.9	1.3	1.4	1.8	0.5	0.5	1.0	1.1	1.6
PULS (TN/TV Puls)	1.1	1.5	1.9	2.3	1.1	1	1.27	1.8	~	0.7
PULS 2				0.1	1.1				0.1	0.7
Polsat News		0.6	0.8	0.9	1.0		0.5	0.6	0.7	0.7
TTV - Twoja Telewizija				0.3	1.0				0.3	0.8
Polish private channels	**40.8**	**40.4**	**47.9**	**49.7**	**52.2**	**44.1**	**43.3**	**49.6**	**48.4**	**51.4**
AXN Polska	0.7	0.8	0.7	0.8	0.8	0.7	0.7	0.7	0.8	0.8
Disney Channel Polska	1.1	1.2	1.0	0.8	0.7	0.6	0.8	0.6	0.5	0.4
Eurosport	0.5	0.6	0.6	0.7	0.7	0.3	0.4	0.3	0.5	0.4
Discovery	0.6	0.7	0.7	0.6	0.7	0.5	0.5	0.5	0.4	0.5
Foreign channels	**4.7**	**5.7**	**12.7**	**12.8**	**12.0**	**3.1**	**3.9**	**8.7**	**9.1**	**8.6**
Others	**12.0**	**13.1**	**2.9**	**3.3**	**5.8**	**8.9**	**9.7**	**2.6**	**4.5**	**5.7**

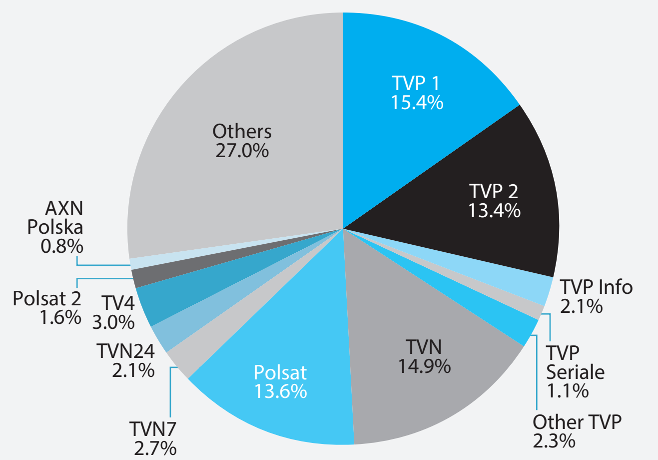
❶ TVP3 was replaced by TVP INFO on 01/09/2013.

❷ Prime time definition changed to 18:00-23:00 starting from 2013.

➥ Eurodata TV Worldwide / Nielsen Television Audience Measurement



2009-2013 Daily share. In %, 4 years +.



2013 Prime time (18:00-23:00). In %, 4 years +.

1 2 3 4 5 6 7 8

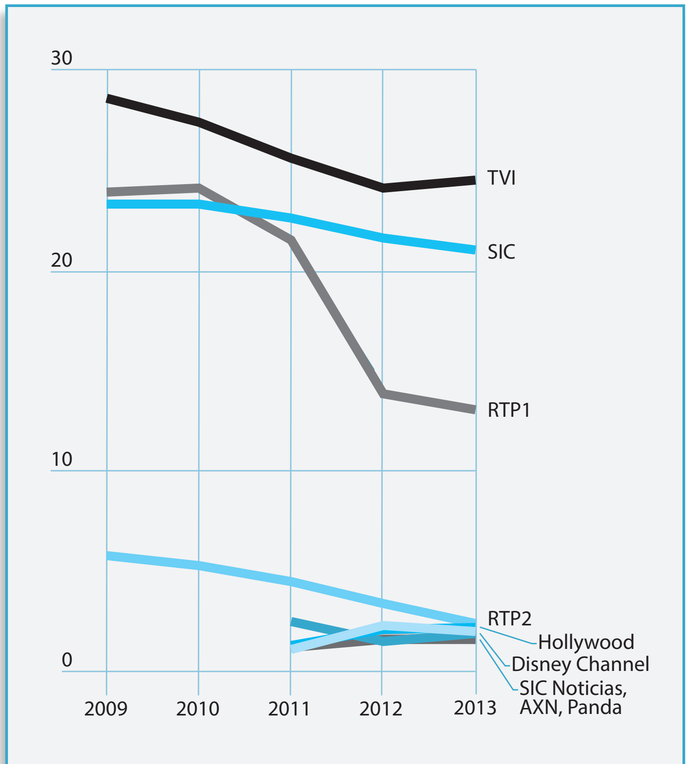
T.5.35 G.5.35 TV audience market share in Portugal

2009-2013 All households. In %, 4 years +.

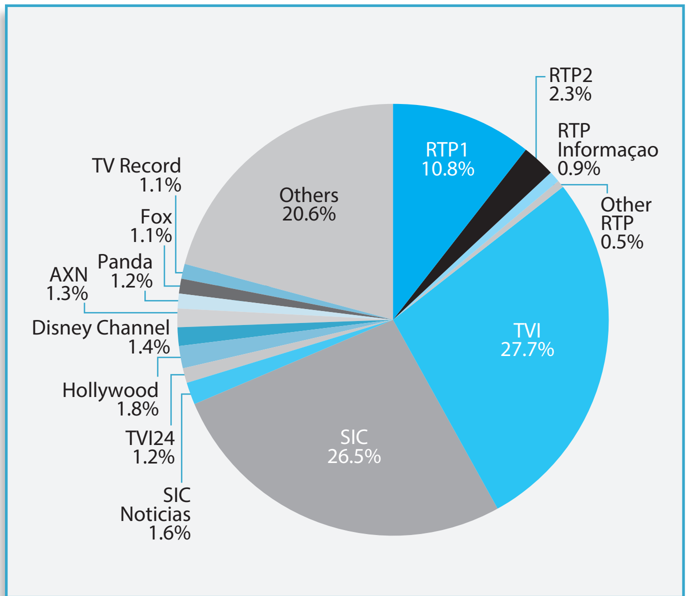
Channels	Daily share 2009	2010	2011	❶ 2012	2013	Prime time (20:00-24:00) 2009	2010	2011	❶ 2012	2013
RTP1	24.0	24.2	21.6	13.9	13.1	22.2	21.9	19.7	12.3	10.8
RTP2	5.8	5.3	4.5	3.4	2.4	4.7	4.5	3.8	3.1	2.3
RTP Informaçao	~	~	0.9	0.9	1.0	~	~	0.7	0.7	0.9
Total main Portuguese public channels	**29.8**	**29.5**	**27.2**	**18.8**	**17.0**	**26.9**	**26.4**	**24.4**	**16.7**	**14.5**
TVI	28.7	27.5	25.7	24.2	24.6	34.2	32.4	29.6	28.2	27.7
SIC	23.4	23.4	22.7	21.7	21.1	23.7	23.8	24.7	25.4	26.5
SIC Noticias	~	~	2.5	1.5	1.9	~	~	2.0	1.2	1.6
TVI24	~	~	0.7	0.9	1.3	~	~	0.7	0.8	1.2
SIC Mulher	~	~	0.9	0.7	0.7	~	~	0.8	0.6	0.7
Sport TV	~	~	1.0	0.7	0.6	~	~	1.5	1.1	0.9
Total main Portuguese private channels	**52.1**	**50.9**	**56.2**	**52.5**	**53.8**	**57.9**	**56.2**	**61.7**	**59.5**	**61.6**
Hollywood	~	~	1.3	2.1	2.2	~	~	1.1	1.8	1.8
Disney Channel	~	~	1.1	2.3	2.0	~	~	0.7	1.5	1.4
AXN	~	~	1.3	1.7	1.6	~	~	1.4	1.6	1.3
Panda	~	~	1.2	1.6	1.6	~	~	0.8	1.0	1.2
Fox	~	~	1.2	1.3	1.3	~	~	1.1	1.2	1.1
TV Record	~	~	0.4	0.9	0.9	~	~	0.4	1.1	1.1
Fox Life	~	~	0.6	0.6	0.6	~	~	0.5	0.5	0.5
Total foreign channels	**~**	**~**	**11.1**	**16.3**	**17.7**	**~**	**~**	**9.0**	**13.4**	**14.5**
Others	**17.0**	**18.5**	**5.5**	**12.4**	**11.5**	**14.3**	**16.3**	**4.9**	**10.4**	**9.4**
Video	**1.1**	**1.1**	**~**	**~**	**~**	**0.9**	**1.1**	**~**	**~**	**~**

❶ In March 2013, CAEM introduced changes to its methodology and panel (in particular regarding the representation of regions and social classes). This new panel has been called into question by RTP which requested an audit.

➡ Before March 2012: Eurodata TV Worldwide / Marktest Audimetria; from March 2012: Eurodata TV Worldwide / CAEM



2009-2013 Daily share. In %, 4 years +.



2013 Prime time (20:00-24:00). In %, 4 years +.

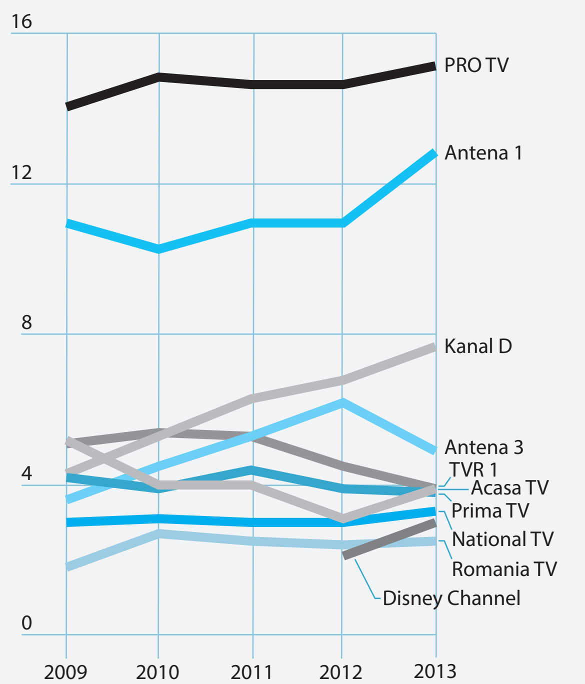
T.5.36
G.5.36

TV audience market share in Romania

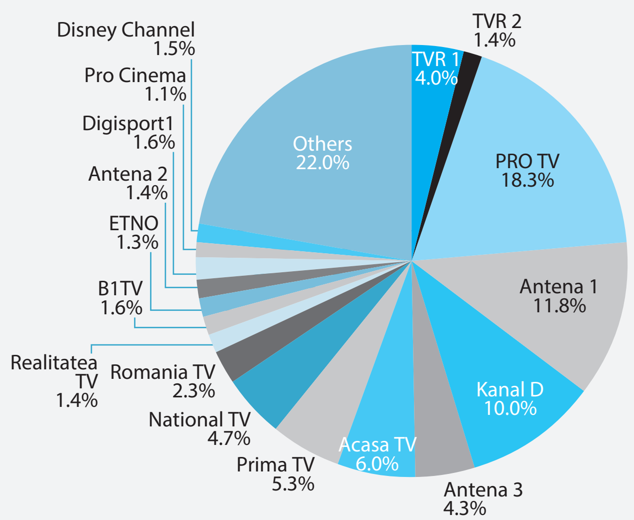
2009-2013 In %, 4 years +.

Channels	Daily share 2009	2010	2011	2012	2013	Prime time (19:00-23:00) 2009	2010	2011	2012	2013
TVR 1	5.1	5.4	5.3	4.5	3.9	5.7	6.8	6.4	4.6	4.0
TVR 2	2.0	1.8	1.7	1.6	1.5	1.9	1.7	1.8	1.7	1.4
Romanian public channels	**7.1**	**7.6**	**8.0**	**6.2**	**5.4**	**7.6**	**8.9**	**8.7**	**6.4**	**5.4**
PRO TV	14.1	14.9	14.7	14.7	15.2	16.4	17.5	16.8	17.4	18.3
Antena 1	11.0	10.3	11.0	11.0	12.9	12.4	10.8	11.0	10.4	11.8
Kanal D	4.3	5.3	6.3	6.8	7.7	4.6	5.2	6.8	8.5	10.0
Antena 3	3.6	4.5	5.3	6.2	4.9	3.0	4.2	5.0	5.8	4.3
Acasa TV	5.2	4.0	4.0	3.1	3.9	7.4	4.4	4.8	4.3	6.0
Prima TV	4.2	3.9	4.4	3.9	3.8	5.3	5.0	5.8	5.5	5.3
National TV	3.0	3.1	3.0	3.0	3.3	3.1	3.8	4.2	4.1	4.7
Romania TV				2.1	3.0				1.8	2.3
Realitatea TV	5.7	6.1	5.6	3.3	2.1	4.3	4.6	4.2	2.3	1.4
B1TV	1.4	1.3	1.2	2.2	2.1	1.7	1.4	1.1	2.0	1.6
ETNO	1.5	2.3	2.3	2.0	1.8	1.2	2.1	2.2	1.6	1.3
Antena 2	~	1.2	1.3	0.8	1.1	~	1.6	1.7	1.2	1.4
Digisport1			0.7	1.0	1.0			0.6	1.5	1.6
Romanian private channels	**62.3**	**64.0**	**72.0**	**68.0**	**71.4**	**67.0**	**67.5**	**75.2**	**73.6**	**77.4**
Disney Channel (former Jetix)	1.8	2.7	2.5	2.4	2.5	1.2	1.8	1.6	1.5	1.5
Cartoon Network	2.3	2.2	2.1	1.5	1.3	1.4	1.4	1.3	0.9	0.7
Disney Junior				0.4	1.2				0.3	0.8
Minimax	1.8	1.7	1.8	1.5	1.1	0.5	0.5	0.6	0.3	0.3
Foreign channels	**7.3**	**8.7**	**13.8**	**12.3**	**14.1**	**3.1**	**3.7**	**9.6**	**8.9**	**9.8**
Others	**23.3**	**19.7**	**6.2**	**13.5**	**9.1**	**22.3**	**19.9**	**6.5**	**11.1**	**7.4**

Eurodata TV Worldwide / ARMA / Kantar Media



2009-2013 Daily share. In %, 4 years +.



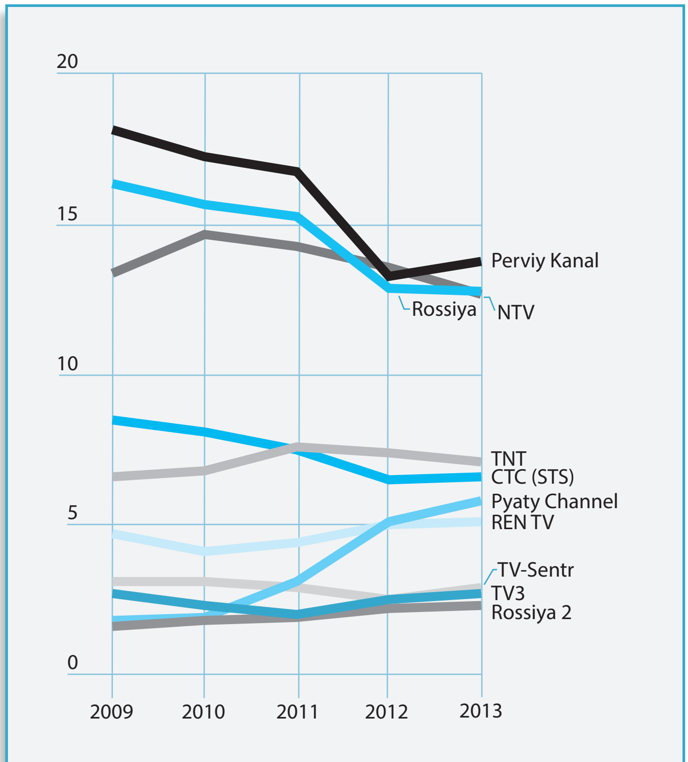
2013 Prime time (19:00-23:00). In %, 4 years +.

T.5.37 G.5.37 TV audience market share in urban population of the Russian Federation 2009-2013 In %, 4 years +.

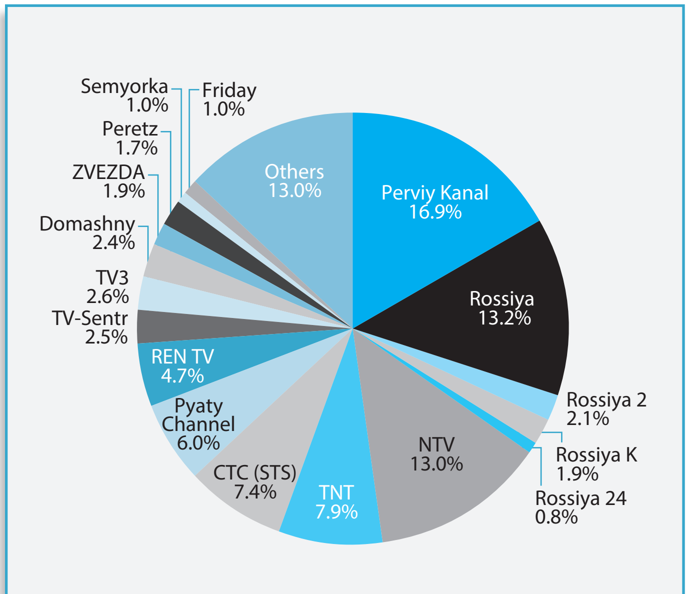
Channels	Daily share 2009	2010	[1] 2011	2012	2013	Prime time (19:00-23:00) 2009	2010	[1] 2011	2012	[2] 2013
Perviy Kanal	18.2	17.3	16.8	13.3	13.8	17.6	17.9	18.8	16.2	16.9
Rossiya	16.4	15.7	15.3	12.9	12.8	18.8	17.0	16.2	13.8	13.2
Rossiya 2	1.6	1.8	1.9	2.2	2.3	1.5	1.6	1.8	2.1	2.1
Rossiya K	1.9	1.7	1.7	1.6	1.6	1.9	1.8	1.9	1.9	1.9
Rossiya 24	0.9	0.8	0.9	0.9	1.2	0.6	0.5	0.6	0.6	0.8
NTV	13.4	14.7	14.3	13.6	12.7	14.9	17.3	16.1	15.2	13.0
TNT	6.6	6.8	7.6	7.4	7.1	7.1	6.7	7.6	7.9	7.9
CTC (STS)	8.5	8.1	7.5	6.5	6.6	9.1	8.5	8.0	7.5	7.4
Pyaty Channel	1.8	1.9	3.1	5.1	5.8	1.5	1.6	2.8	5.5	6.0
REN TV	4.7	4.1	4.4	5.0	5.1	4.1	3.5	4.1	4.8	4.7
TV-Sentr	3.1	3.1	2.9	2.5	2.9	2.6	2.7	2.5	2.1	2.5
TV3	2.7	2.3	2.0	2.5	2.7	2.6	2.2	2.0	2.4	2.6
Domashny	2.1	2.2	2.3	2.5	2.5	1.8	1.9	2.0	2.6	2.4
ZVEZDA	1.3	1.6	1.6	1.8	2.1	1.1	1.4	1.4	1.6	1.9
Peretz (formerly DTV Viasat)	1.9	1.8	1.7	2.0	1.9	1.7	1.5	1.4	1.8	1.7
Semyorka (Disney Channel)	0.3	1.0	1.7	2.2	1.7	0.2	0.9	1.7	1.3	1.0
You (former Muz TV)	0.7	0.9	1.1	1.0	1.0	0.5	0.8	1.0	0.9	0.8
Friday (former MTV Russia)	1.0	0.9	0.7	0.7	1.0	0.7	0.8	0.5	0.8	1.0
2X2			0.8	0.8	0.8			0.9	0.9	0.9
RU.TV				0.2	0.4				0.1	0.3
Euronews	0.2	0.2	0.2	0.2	0.2	0.1	0.1	0.1	0.0	0.0
Karusel					0.2					0.2
Muz TV	~	~	~	~	0.1	~	~	~	~	0.1
Rambler	–	–	–	–	~	–	–	–	–	~
Others	12.7	13.1	11.5	15.1	13.5	11.6	11.3	8.6	10.0	10.7

[1] Based on non-normalised market shares.
[2] Prime time definition changed to 19:00-24:00 starting from 2013.

Eurodata TV Worldwide / TNS Russia



2009-2013 Daily share. In %, 4 years +.



2013 Prime time (19:00-24:00). In %, 4 years +.

T.5.38
G.5.38

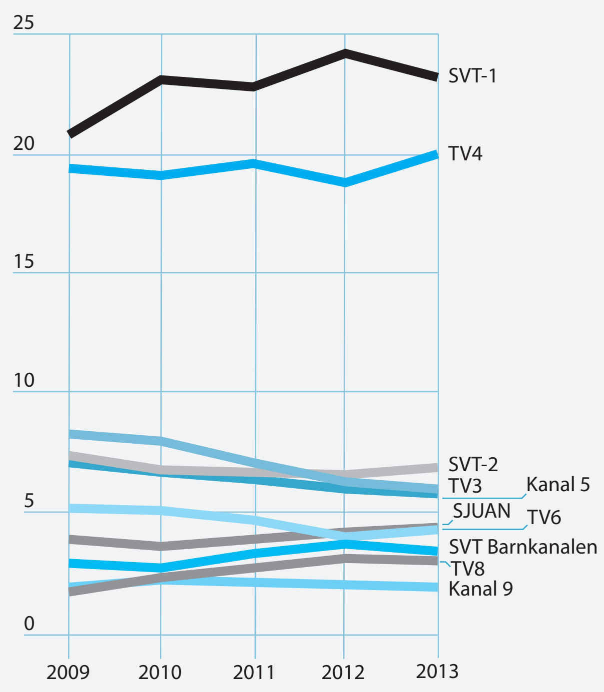
TV audience market share in Sweden

2009-2013 In %, 3 years +.

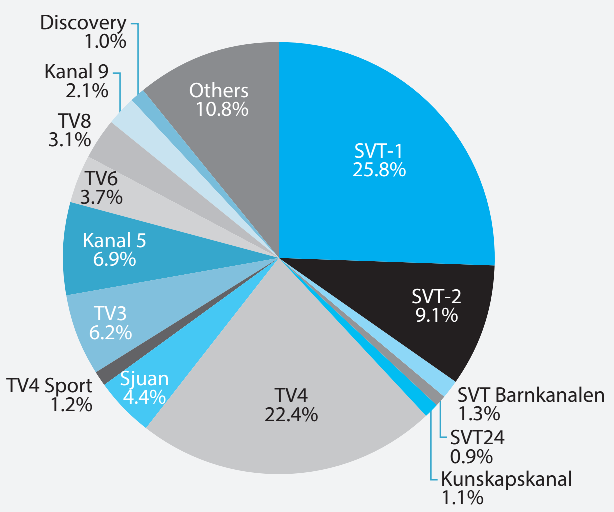
Channels	Daily share 2009	2010	2011	2012	2013	Prime time (19:00-22:00) ❸ 2009	2010	2011	2012	2013
SVT-1	20.9	23.2	22.9	24.3	23.3	25.6	27.6	27.7	29.5	25.8
SVT-2	7.5	6.9	6.8	6.7	7.0	9.5	9.3	8.8	9.3	9.1
SVT Barnkanalen	3.0	2.8	3.4	3.8	3.5	1.8	1.3	1.5	1.6	1.3
SVT24	1.5	1.0	0.8	0.7	0.6	1.6	1.3	1.2	1.0	0.9
Kunskapskanal ❶	–	1.0	0.9	1.0	0.9	–	1.0	0.9	1.0	1.1
Swedish public channels	**32.9**	**35.2**	**34.8**	**36.5**	**35.3**	**38.5**	**40.9**	**40.1**	**42.4**	**38.2**
TV4	19.5	19.2	19.7	18.9	20.1	20.9	21.2	22.3	20.9	22.4
SJUAN (formerly TV4 +)	4.0	3.7	4.0	4.3	4.5	3.6	3.4	3.7	4.1	4.4
TV4 Sport	1.4	1.3	1.4	1.4	1.5	1.4	1.2	1.3	1.2	1.2
TV4 Fakta	1.1	1.2	1.1	0.9	1.0	0.7	0.7	0.6	0.6	0.7
TV4 Film	0.9	0.8	0.7	0.7	0.7	0.8	0.6	0.6	0.5	0.6
TV4 Guld	0.4	0.4	0.5	0.4	0.6	0.2	0.2	0.5	0.3	0.4
Kanal 11 (formerly TV11) ❷	0.6	0.5	1.1	1.1	0.5	0.4	0.4	0.7	0.0	0.5
Swedish private channels	**28.2**	**27.5**	**32.5**	**31.4**	**32.9**	**28.2**	**28.1**	**32.2**	**30.2**	**34.0**
TV3	8.4	8.1	7.2	6.4	6.1	8.5	7.4	6.6	5.9	6.2
Kanal 5	7.2	6.8	6.5	6.1	5.9	7.8	7.4	6.5	6.4	6.9
TV6	5.3	5.2	4.8	4.1	4.4	4.6	4.5	4.0	3.4	3.7
TV8	1.8	2.4	2.8	3.2	3.1	1.8	2.3	2.9	3.2	3.1
Kanal 9	2.0	2.3	2.2	2.1	2.0	2.1	2.3	2.2	2.0	2.1
Discovery	1.8	1.2	1.2	1.3	1.4	1.1	0.8	0.9	0.8	1.0
TV10			0.8	0.9	1.0			0.6	0.7	0.8
Disney Channel	1.0	0.8	0.8	0.8	0.9	0.6	0.5	0.4	0.5	0.4
Total foreign channels	**30.2**	**29.2**	**33.4**	**31.6**	**31.1**	**27.6**	**26.0**	**27.0**	**26.0**	**29.6**
Others	**8.7**	**8.1**	**0.0**	**0.5**	**0.7**	**5.7**	**5.0**	**0.7**	**1.4**	**–**

❶ Until 2009 Kunskapskanalen data were merged with those of Barnkanalen.
❷ TV11 was sold by TV4 Group to SBS Discovery Media on 01/06/2013. TV11 was renamed KANAL 11 on 01/10/2013.
❸ Prime time definition changed to 19:00-23:00 starting from 2013.

➡ Eurodata TV Worldwide / MMS MEDIAMÄTNING I SKANDINAVIEN AB



2009-2013 Daily share. In %, 3 years +.



2013 Prime time (19:00-23:00). In %, 3 years +.

T.5.39
G.5.39

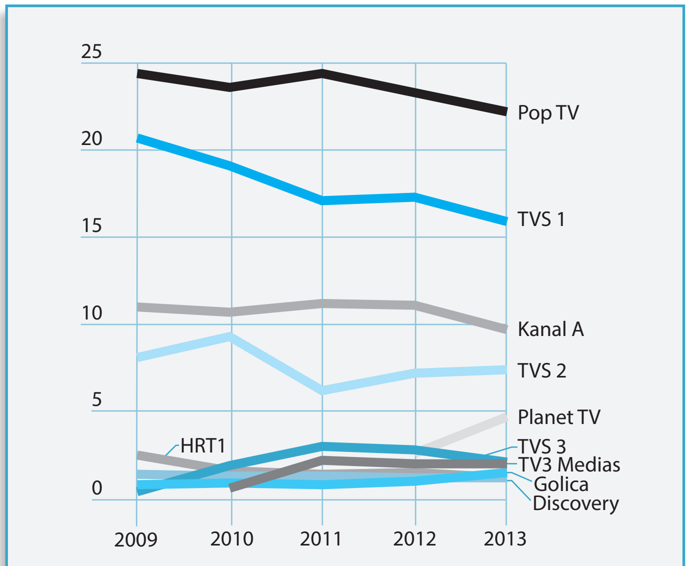
TV audience market share in Slovenia

2009-2013 In %, 4 years +.

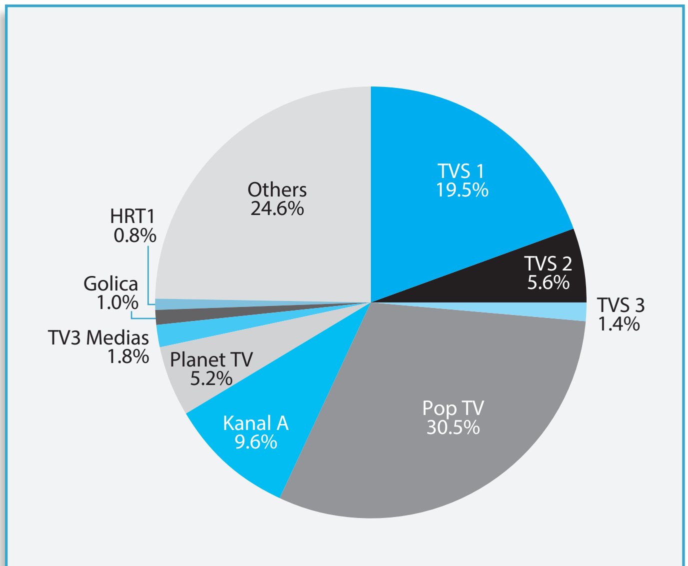
Channels	Daily share 2009	2010	2011	2012	2013	Prime time (19:15-23:00) ❷ 2009	2010	2011	2012	2013
TVS 1	20.7	19.1	17.1	17.3	15.9	24.1	22.1	20.3	20.8	19.5
TVS 2	8.1	9.3	6.2	7.2	7.4	6.9	8.5	4.9	5.9	5.6
TVS 3	0.4	1.9	3.0	2.8	2.1	0.3	1.7	2.6	2.2	1.4
Tele Maribor	0.4	0.5	0.5	0.3	0.3	0.5	0.6	0.5	0.3	0.3
Koper	0.2	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.0	0.0
Slovenian public channels	**29.8**	**30.9**	**26.9**	**27.7**	**25.8**	**31.9**	**33.0**	**28.4**	**29.2**	**26.8**
Pop TV	24.4	23.6	24.4	23.3	22.2	32.3	30.9	32.1	30.9	30.5
Kanal A	11.0	10.7	11.2	11.1	9.7	10.4	10.6	11.1	11.3	9.6
Planet TV				2.6	4.7				2.6	5.2
TV3 Medias ❶	–	0.6	2.2	2.0	2.0		0.6	2.0	1.7	1.8
Golica	0.8	0.9	0.8	1.0	1.5	0.4	0.5	0.5	0.7	1.0
Kino			0.2	0.3	0.9			0.1	0.3	0.9
Oto			0.3	0.8	0.8			0.2	0.4	0.4
Brio	–	–	1.2	0.4	0.7	–	–	1.0	0.3	0.4
Veseljak TV			0.2	0.3	0.6			0.1	0.2	0.4
Klasik TV				0.6	0.5				0.6	0.4
Slovenian private channels	**35.1**	**37.1**	**37.0**	**36.5**	**37.5**	**41.9**	**44.2**	**43.1**	**42.9**	**52.7**
HRT1	2.5	1.6	1.4	1.5	1.2	2.0	1.3	1.1	1.1	0.8
Discovery	1.4	1.3	1.3	1.2	1.2	0.7	0.7	0.8	0.7	0.7
Minimax				0.7	1.1				0.2	0.4
Fox Crime			0.8	1.3	1.0			0.5	0.8	0.7
Universal			0.7	1.1	0.8			0.4	0.7	0.4
Fox Life			0.6	1.0	0.8			0.3	0.6	0.6
National Geographic		0.9	0.7	0.9	0.8		0.5	0.4	0.6	0.5
HRT2	1.3	0.9	0.8	0.9	0.8	1.1	0.7	0.7	0.9	0.7
Nova TV			0.4	0.5	0.7			0.4	0.6	0.8
Disney Channel			0.5	0.3	0.7			0.3	0.2	0.5
Discovery ID					0.7					0.4
Animal Planet		0.7	0.5	0.5	0.6		0.4	0.3	0.3	0.4
Total foreign channels	**7.6**	**8.1**	**20.0**	**22.5**	**21.5**	**5.8**	**5.7**	**12.9**	**16.1**	**15.5**
Others	**27.5**	**23.9**	**16.1**	**13.3**	**15.2**	**20.4**	**17.1**	**15.6**	**11.8**	**5.0**

❶ Pink Slovenia was renamed TV3 Medias in March 2012.
❷ Prime time definition changed to 19:00-22:59 starting from 2013.

➡ Eurodata TV Worldwide / Nielsen Television Audience Measurement



2009-2013 Daily share. In %, 4 years +.



2013 Prime time (19:00-22:59). In %, 4 years +.

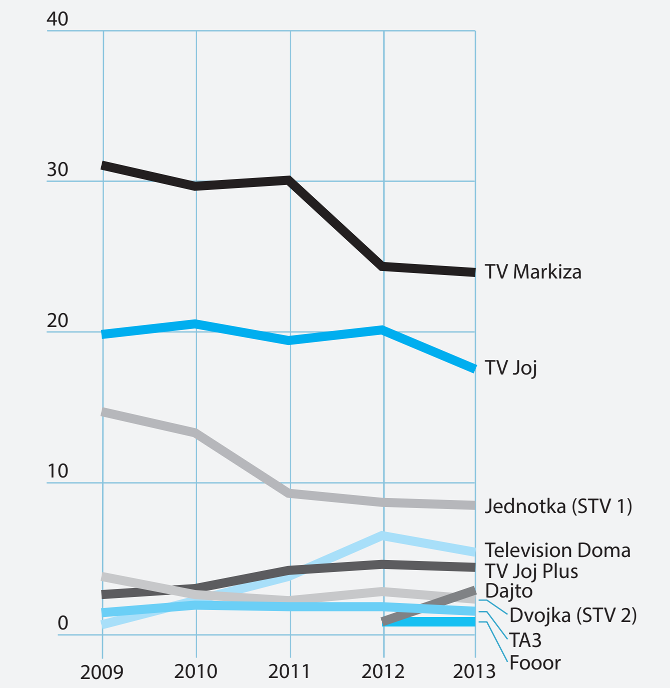
T.5.40 G.5.40

TV audience market share in Slovakia 2009-2013 In %, 4 years +.

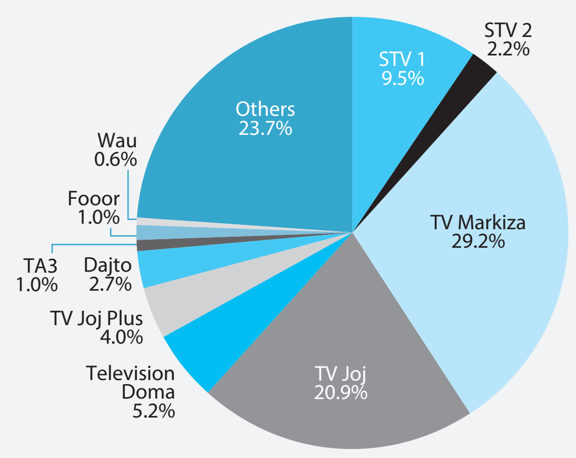
Channels	Daily share 2009	2010	2011	2012	2013	Prime time (19:00-22:00) 2009	2010	2011	2012	2013
Jednotka (STV 1)	14.8	13.4	9.4	8.8	8.6	16.5	13.6	9.6	8.9	9.5
Dvojka (STV 2)	3.9	2.7	2.3	2.9	2.4	3.4	2.4	2.1	2.5	2.2
Trojka (STV 3) [1]	1.0	1.4	0.5	–	–	0.9	1.4	0.5	–	–
Total Slovak public channels	**19.7**	**17.5**	**12.2**	**11.7**	**11.0**	**20.8**	**17.4**	**12.2**	**11.4**	**11.7**
TV Markiza	31.1	29.7	30.1	24.4	24.0	34.4	33.4	36.4	28.3	29.2
TV Joj	19.9	20.6	19.5	20.2	17.6	22.6	24.2	21.8	24.4	20.9
Television Doma	0.7	2.3	3.9	6.6	5.5	0.4	1.9	3.3	7.9	5.2
TV Joj Plus	2.7	3.1	4.3	4.7	4.5	2.1	2.2	3.6	3.8	4.0
Dajto				0.9	3.0				0.7	2.7
TA3	1.5	2.0	1.9	1.9	1.6	0.9	1.2	1.1	1.2	1.0
Fooor					0.9					1.0
Wau					0.7					0.6
Senzi					0.1					0.0
Total Slovak private channels	**55.9**	**57.7**	**59.7**	**58.7**	**57.9**	**60.4**	**62.9**	**66.2**	**66.3**	**64.6**
Czech TV	7.3	~	~	~	~	6.5	~	~	~	~
Hungarian TV	4.7	~	~	~	~	4.8	~	~	~	~
Total main foreign channels	**12.0**	**~**	**~**	**~**	**~**	**11.3**	**~**	**~**	**~**	**~**
Others	**12.4**	**24.8**	**28.1**	**29.6**	**31.1**	**7.5**	**19.7**	**21.6**	**22.3**	**23.7**

[1] TROJKA ceased broadcasting on 30/06/2011.

Eurodata TV Worldwide / PMT / TNS SK



2010-2013 Daily share. In %, 4 years +.



2013 Prime time (19:00-22:00). In %, 4 years +.

T.5.41
G.5.41

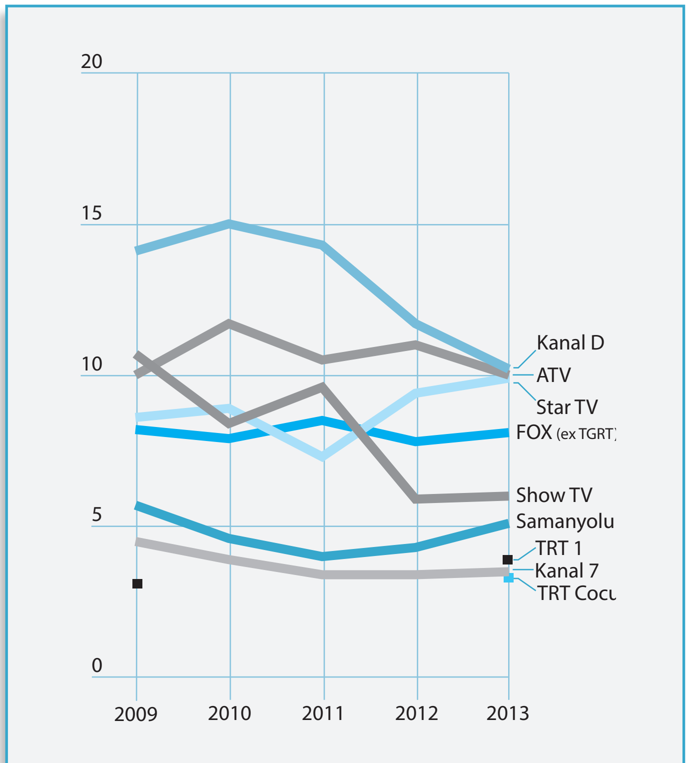
TV audience market share in Turkey

2009-2013 In main urban areas, in %, 5 years +.

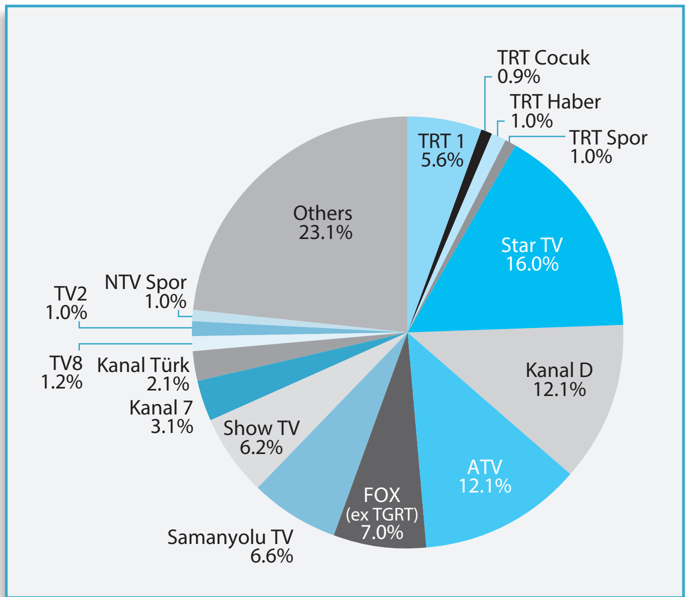
Channels	Daily share 2009	2010	❶2011	❷2012	2013	Prime time (20:00-23:00) 2009	2010	❶2011	❷2012	2013
TRT 1	3.1	~	~	~	3.9	3.0	~	~	~	5.6
TRT Cocuk					3.3					0.9
TRT Haber	~	~	~	~	1.2	~	~	~	~	1.0
TRT Spor					1.0					1.0
Main Turkish public channels	**3.1**	**~**	**~**	**~**	**8.4**	**3.0**	**~**	**~**	**~**	**7.5**
Kanal D	14.1	15.0	14.3	11.7	10.2	19.8	21.2	19.8	14.6	12.1
ATV	10.0	11.7	10.5	11.0	10.0	11.9	13.8	11.3	12.6	12.1
Star TV	8.6	8.9	7.3	9.4	9.9	8.6	9.3	7.6	15.3	16.0
FOX (ex TGRT)	8.2	7.9	8.5	7.8	8.1	7.9	7.3	7.6	6.7	7.0
Show TV	10.7	8.4	9.6	5.9	6.0	12.2	9.2	13.2	6.7	6.2
Samanyolu TV	5.7	4.6	4.0	4.3	5.1	7.1	4.9	4.4	4.7	6.6
Kanal 7	4.5	3.9	3.4	3.4	3.5	4.1	3.7	3.3	3.1	3.1
Kanal Türk	–	–	–	2.0	1.9	–	–	–	2.2	2.1
Yumurcak					1.8					0.8
TV2					1.4					1.0
NTV Spor					1.2					1.0
TV8	–	–	–	1.1	1.1	–	–	–	1.0	1.2
NTV					0.9					0.8
Habertürk ❸	1.6	0.6	~	~	0.8	1.2	0.5	~	~	0.6
Halk TV					**0.7**					**0.6**
CNN Türk					0.6					0.5
Samanyiolu Haber					0.6					0.6
Cine 5 ❹	1.1	0.6	~	~	0.6	0.8	0.6	~	~	0.5
Main Turkish private channels	**66.3**	**63.3**	**62.5**	**56.6**	**67.0**	**75.3**	**72.0**	**72.6**	**66.9**	**74.5**
Others	**30.6**	**36.7**	**37.5**	**43.4**	**24.6**	**21.7**	**28.0**	**27.4**	**33.1**	**18.0**

❶ Audience shares of the channels for 2011 are reported from 01/01/2011 until 19/12/2011 only.
❷ Audience shares of the channels for 2012 are reported from 17/09/2012 until 31/12/2012 only.
❸ Habertürk is reported from 01/01/2010 to 31/05/2010.
❹ Cine5 is reported from 01/01/2010 to 30/09/2010.

➡ Eurodata TV Worldwide / Nielsen Television Audience Measurement / TIAK (2010-2011) and Eurodata-TV / TIAK / Kantar media (from September 2012)



2009-2013 Daily share. In %, 5 years +.



2013 Prime time (20:00-23:00). In %, 5 years +.

T.5.42

Average television viewing per person in Europe

2009-2013 In minutes per day.

Country	Target age group	2009	2010	2011	2012	2013	2013/12
AM	4+		260	242	226	169	-25.2%
AT	3+	133	152	158	160	158	-1.3%
BA	4+		271	255	280	282	0.7%
BE (CFB)	4+	187	203	196	199	194	-2.5%
BE (VLG)	4+	144	174	172	180	178	-1.1%
BG (1)	4+	~	241	225	229	225	-1.7%
CH (Al.)	3+	125	143	137	136	129	-5.1%
CH (It.)	3+	153	186	172	166	166	0.0%
CH (Ro.)	3+	144	162	155	151	141	-6.6%
CY	4+	–	184	174	179	202	12.8%
CZ	4+	~	191	197	201	208	3.5%
DE	3+	178	223	225	222	221	-0.5%
DK	3+	147	201	198	195	180	-7.7%
EE	4+	192	235	229	226	216	-4.4%
ES	4+	204	234	239	246	244	-0.8%
FI	4+	~	172	172	177	174	-1.7%
FR	4+	177	212	227	230	226	-1.7%
GB	4+	220	242	242	241	232	-3.7%
GR	4+	183	274	268	262	251	-4.2%
HR	4+		269	267	263	255	-3.0%
HU	4+	147	284	286	286	286	0.0%
IE	4+	191	196	205	203	196	-3.4%
IS	12-80		146	142	134	123	-8.2%
IT	4+	207	246	253	257	261	1.6%
LT	4+	128	207	204	216	220	1.9%
LV	4+	192	215	209	214	199	-7.0%
MK	4+		293	288	274	267	-2.6%
NL	6+	147	191	191	196	195	-0.5%
NO	2+	136	174	168	165	157	-4.8%
PL	4+	~	245	242	243	247	1.6%
PT (2)	4+	–	210	219	284	298	4.9%
RO	4+	–	263	262	326	341	4.6%
RU	4+	–	226	220	238	239	0.4%
SE	3+	125	166	162	164	159	-3.0%
SI	4+	–	192	186	193	195	1.0%
SK	4+	–	204	207	218	227	4.1%
TR	5+	~	230	228	242	240	-0.8%

(1) Change of panel in 2011.
(2) Change of measurement company in 2012. 2012 data for March-December.

Eurodata TV Worldwide

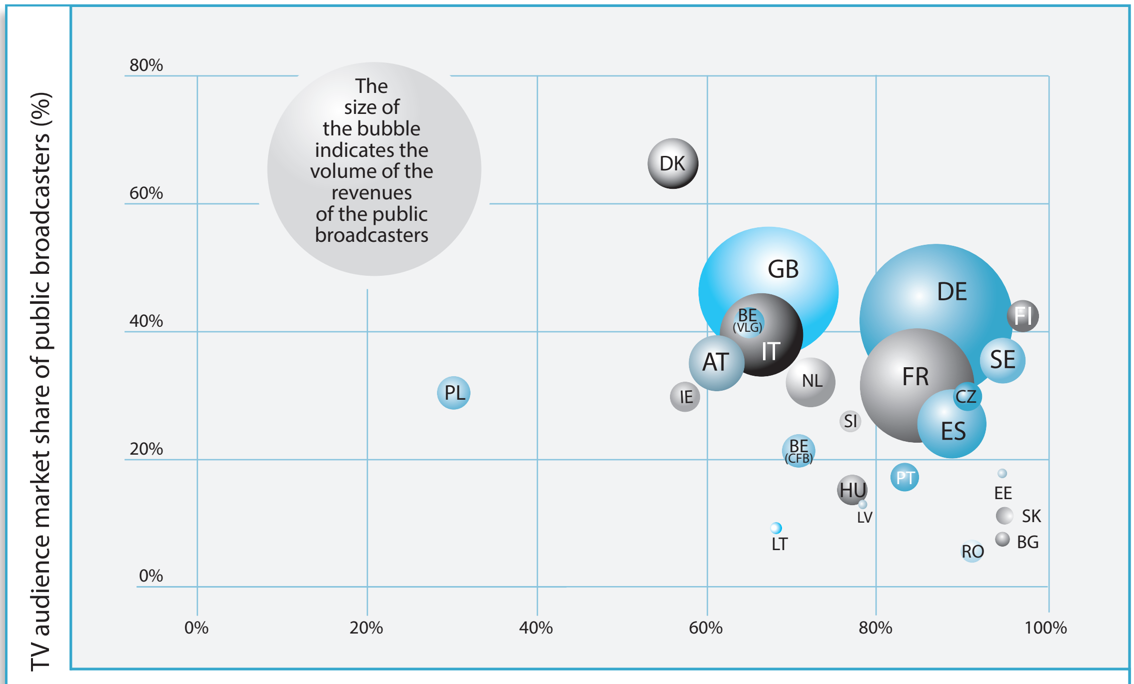
T.5.43
G.5.42

Relationship between the share of public funding of the public broadcasters and the TV audience market share

2013

Country	Share of public funding (in %)	Daily audience market share (in %)	Total revenues of public broadcasters (EUR million)
AT	61.1	34.9	1 008.1
BE (CFB)	70.8	20.9	323.6
BE (VLG)	65.6	40.3	448.9
BG	94.5	7.4	61.0
CY	88.1	19.4	30.8
CZ	89.0	29.2	371.0
DE	86.9	41.7	8 909.7
DK	55.9	66	889.6
EE	94.6	17.6	30.5
ES	88.5	25.1	1 833.5
FI	97.0	42	469.1
FR	84.7	30.6	4 285.7
GB	67.1	46.3	7 127.1
HR	85.1	26.1	190.7
HU	77.0	14.9	332.7
IE	57.4	29.6	374.0
IT	66.1	38.7	2 627.7
LT	68.2	8.7	20.9
LV	78.1	12.6	16.8
NL	72.0	31.9	885.5
PL	30.2	30	458.0
PT	83.0	17	234.0
RO	91.0	5.4	233.5
SE	94.4	35.3	814.3
SI	76.7	25.8	125.9
SK	94.9	11	100.5

European Audiovisual Observatory



2013 Share of public funding in the revenues of public broadcasters (%)

CHAPTER
CHAPITRE
KAPITEL
6

On-demand audiovisual services

Contents	Sommaire	*Inhalt*	
Supply of services	Offre de services	Diensteangebot	175
Consumers' expenses	Dépenses des consommateurs	Ausgaben der Verbraucher	188
Companies	Entreprises	Unternehmen	193

Services audiovisuels à la demande

Audiovisuelle Abrufdienste in Europa

On-demand audiovisual services

On-demand audiovisual services established in Europe

As of the 31st December 2013, the MAVISE database ❶ included 3 088 on-demand audiovisual services (hereafter ODAS) that are established in the European Union (T.6.1). The most common type of ODAS are catch-up TV services with 1 104 services in the 28 Member States of the European Union, which comes as no surprise as more and more TV channels are proposing catch-up services for their linear TV channels. The second most common category is "branded channels on open platforms" such as YouTube and Dailymotion. This is a general trend involving both broadcasters and right holders, as they are trying to engage with younger audiences, who consume content on those open platforms, and as it is also a new way to further valorise existing content (be it by advertising revenues generated or by a greater exposure of the content). MAVISE includes branded channels of broadcasters; however in the past two years, branded channels for individual programmes have been on the rise as fan bases and communities are built and engage around those programmes. The third most common category of ODAS in the European Union is that of Film Video-on-Demand services with 409 services established as of the 31st of December 2013, followed by TV fiction VoD services with 114 services. It is interesting to note that 124 Film VoD services are established in the United States and are targeting European countries.

At the national level, the United Kingdom with 682 ODAS is the European country with the highest number of ODAS services established in the country, followed by France with 434 ODAS and Germany with 330 ODAS. Luxembourg boasts the highest number for established Film VoD services in the European Union with 82 services due to the fact that most of the international VoD services such as Apple's iTunes, and Netflix are established in the country ❷ and are targeting other European countries with their on-demand audiovisual services.

Development of the VoD market

The assessment of the VoD market remains a difficult exercice due to the lack of data published by the main providers. We reproduce here estimates elaborated by IHS for the IVF, on the basis of informal contacts with companies. ❸

Services audiovisuels à la demande

Services audiovisuels à la demande établis en Europe

Au 31 décembre 2013, la base de données MAVISE ❶ compte 3 088 services audiovisuels à la demande (on-demand audiovisual service - ODAS) établis dans l'Union européenne (T.6.1). Le type d'ODAS le plus courant est les services de télévision de rattrapage, au nombre de 1 104 dans les 28 Etats membres de l'Union européenne, ce qui n'est pas surprenant dans la mesure où de plus en plus de chaînes de télévision proposent des services de rattrapage pour leurs chaînes de télévision linéaires. La deuxième catégorie la plus courante est celle des « chaînes de marque (branded channels) sur plates-formes ouvertes » telles que YouTube et Dailymotion. Il s'agit d'une tendance générale impliquant à la fois les radiodiffuseurs et les ayants droit : ils essaient d'attirer le jeune public, consommateur de contenu sur ces plates-formes ouvertes, et trouvent ainsi une nouvelle façon de valoriser davantage le contenu existant (que ce soit par les recettes publicitaires générées ou par une plus grande exposition du contenu). MAVISE ne couvre que les chaînes de marque des radiodiffuseurs ; toutefois, ces deux dernières années, les chaînes de marque dédiées à des programmes spécifiques se sont développées alors que des communautés et bases de fans se sont constituées et impliquées autour de ces programmes. La troisième catégorie la plus courante d'ODAS dans l'Union européenne est celle des services de vidéo à la demande de films avec 409 services établis au 31 décembre 2013, suivie par les services de VoD de fictions télévisées avec 114 services. Il est intéressant de noter que 124 services de VoD Films établis aux Etats-Unis visent les pays européens.

Au niveau national, le Royaume-Uni est, avec 682 ODAS, le pays européen dans lequel est établi le plus grand nombre de services ODAS, suivi par la France (434 ODAS) et l'Allemagne (330 ODAS). Avec 82 services, le Luxembourg compte le plus grand nombre de services de VoD Films établis dans l'Union européenne : en effet, la plupart des services de VoD internationaux comme iTunes d'Apple et Netflix sont établis dans ce pays ❷ et ciblent d'autres pays européens avec leurs services audiovisuels à la demande.

Évolution du marché de la VoD

L'évaluation du marché de la VoD reste un exercice difficile en raison du manque de données publiées par les principaux fournisseurs. Nous reproduisons ici des estimations établies par IHS pour l'IVF, sur la base de contacts informels avec les sociétés. ❸

La valeur globale du marché des dépenses de consommation en vidéo numérique ❹ et

Audiovisuelle Abrufdienste in Europa

Audiovisuelle Abrufdienste in Europa

Am 31. Dezember 2013 waren in der MAVISE-Datenbank ❶ insgesamt 3 088 audiovisuelle Abrufdienste erfasst, die ihren Sitz in der Europäischen Union haben (T.6.1). Bei den meisten dieser Dienste handelt es sich um Catch-up-TV mit 1 104 Anbietern in den 28 Mitgliedstaaten der Europäischen Union. Das ist keine Überraschung, denn inzwischen bieten immer mehr Fernsehsender Catch-up-Dienste für ihre linearen Fernsehprogramme an. Die zweithäufigste Kategorie sind „Markenkanäle auf offenen Plattformen" wie YouTube und Dailymotion. Hier haben wir es mit einem allgemeinen Trend zu tun. Jüngere Zuschauer konsumieren audiovisuelle Inhalte zunehmend auf diesen offenen Plattformen, und wenn Fernsehveranstalter (aber auch Rechteinhaber) junge Zuschauer erreichen wollen, dann müssen sie diesem Trend folgen. Außerdem ist dies auch ein neuer Weg, um vorhandene Inhalte weiter zu verwerten (entweder durch Werbeeinnahmen oder durch eine stärkere Verbreitung der Inhalte). MAVISE erfasst auch Markenkanäle von Fernsehsendern; allerdings ist in den letzten zwei Jahren die Zahl der Markensender für individuelle Programme rasant gestiegen, nachdem um diese Programme herum immer mehr Fangemeinden entstanden sind. Die dritthäufigste Kategorie audiovisueller Abrufdienste in der Europäischen Union sind Film-Video-on-Demand-Dienste mit 409 Anbietern zum 31. Dezember 2013, gefolgt von Fernsehfilm-VoD-Diensten mit 114 Anbietern. 124 dieser Film-VoD-Dienste haben interessanterweise ihren Sitz in den Vereinigten Staaten und richten sich mit ihrem Angebot an europäische Länder.

Das europäische Land mit der größten Zahl von VoD-Anbietern ist das Vereinigte Königreich mit 682 Diensten, gefolgt von Frankreich mit 434 und Deutschland mit 330 Abrufdiensten. Luxemburg ist das Land, in dem die meisten Film-VoD-Dienste in der Europäischen Union ihren Sitz haben: insgesamt 82 Anbieter. Dies liegt daran, dass die meisten internationalen VoD-Anbieter wie iTunes von Apple und Netflix ihren Sitz in Luxemburg haben ❷ und von dort aus andere europäische Länder mit ihren audiovisuellen Abrufdiensten versorgen.

Entwicklung des VoD-Marktes

Die Bewertung des VoD-Marktes ist schwierig, da die wichtigsten Anbieter kaum Daten veröffentlichen. Im Folgenden werden Schätzungen vorgestellt, die vom IHS für die IVF (International Video Federation –Europäischer Verband der Video-Anbieter) vorgenommen wurden und die auf informellen Kontakten zu den Unternehmen beruhen. ❸

Insgesamt beliefen sich die Verbraucherausgaben für digitales Video ❹ und TV-

❶ For further details on MAVISE and statistics collected on on-demand audiovisual services please refer to Yearbook 2013 and 2012.

❷ Netflix has announced that it will move its European headquarter from Luxembourg to Amsterdam. Microsoft Xbox Video is also established in Luxembourg but not considered by Luxembourg authorities as an ODAS but as a distribution platform.

❸ IVF Market information, http://www.ivf-video.org/new/index.php?category/Market-information.

The overall market value for consumer spend on digital video 4 and TV VoD 5 for the 16 European countries (14 Member states of the European Union plus Norway and Switzerland) totalled 1 835 EUR million in 2013 (T.6.6 and T.6.7), a growth year-on-year of 43.9% and with a compound annual growth rate of 31.8% during a 5 year time period.

The interesting point to highlight is that while in 2009, consumer spend on TV VoD represented 76.9% of the total consumer spend on VoD (digital and TV VoD) and consumer spend on digital video on the Open Internet represented only 23.1%, the proportions have almost been reversed in the course of the last 5 years. In 2013, consumer spend on digital video represented 60.6% of the total consumer spend on VoD while the share of consumer spend on TV VoD had fallen to 39.4% of the total. This evolution is significant; in 2009, more than ¾ of consumer spend on VoD was on managed networks (such as pay TV services, cable networks) and less than ¼ on the Open Internet (or "Over-the-Top" – OTT). In 2012, consumer spend on digital video delivered on the Open Internet surpassed consumer spend on TV VoD and this trend continues strongly in 2013. When observing the yearly growth rates for the two categories of consumer spend on VoD (G.6.4), this trend appears more clearly; on the considered time period 2009-2013, TV VoD grew between 15.7% and 25.8% by year (with a compound annual growth rate of 15.3% over the past 5 years) whereas digital video delivered on the Open Internet grew by at least 57.9% by year and up to 100.8% (with a compound annual growth rate of 59.9% over the past 5 years).

The momentum is for digital video delivered on the Open Internet (or OTT VoD offers). This is further enhanced by the fact that OTT players such as Netflix or wuaki.tv have entered new European markets in 2014 and that traditional players such as Canal+, BSkyB, Sky Deutschland have also launched their OTT stand-alone offers (e.g. Canal Play, Now TV, Sky Snap respectively). As audiences aim to have access to their content everywhere, any time and on any device (or "ATAWAD" content consumption), traditional players and new entrants are adapting to this form of consumption by offering standalone OTT offers. 6

The expansion on the supply side is accompanied by changes on the demand side. Broadband penetration in European households is on the rise, allowing for the smooth delivery of video on the

en VoD TV 5 pour les 16 pays européens (14 Etats membres de l'Union européenne plus la Norvège et la Suisse) totalise 1 835 millions EUR en 2013 (T.6.6 et T.6.7), soit une croissance de 43,9 % par rapport à l'année précédente et un taux de croissance annuel composé de 31,8 % sur 5 ans.

Il est intéressant de souligner que, si en 2009 les dépenses de consommation en VoD TV représentaient 76,9 % des dépenses totales en VoD (numérique et VoD TV) et les dépenses en vidéo numérique sur l'internet ouvert ne représentaient que 23,1 %, les proportions ont pratiquement été inversées au cours des 5 dernières années. En 2013, les dépenses de consommation en vidéo numérique représentent 60,6 % du total des dépenses en VoD tandis que la part des dépenses en VoD TV est tombée à 39,4 % de ce total. Cette évolution est significative : en 2009, plus de ¾ des dépenses de consommation en VoD s'effectuaient sur des réseaux gérés (tels que services de télévision payante, réseaux câblés) et moins d'un quart sur l'internet ouvert (ou *Over-the-Top* - OTT). En 2012, les dépenses de consommation en vidéo numérique mise à disposition sur l'internet ouvert ont dépassé les dépenses en VoD TV et cette tendance se confirme en 2013. Lorsque l'on observe les taux de croissance annuels pour les deux catégories de dépenses de consommation en VoD (G.6.4), cette tendance apparaît plus clairement : sur la période considérée 2009 - 2013, la VoD TV a augmenté entre 15,7 et 25,8 % par an (avec un taux de croissance annuel composé de 15,3 % sur les 5 dernières années) alors que la vidéo numérique mise à disposition sur l'internet ouvert a augmenté d'au moins 57,9 % par année et jusqu'à 100,8 % (avec un taux de croissance annuel composé de 59,9 % sur les 5 dernières années).

Cette dynamique concerne la vidéo numérique mise à disposition sur l'internet ouvert (ou offres de VoD OTT). Elle est encore renforcée par le fait que les acteurs de l'OTT tels que Netflix ou wuaki.tv ont pénétré de nouveaux marchés européens en 2014 et que des acteurs traditionnels tels que Canal+, BSkyB et Sky Deutschland ont également lancé leurs offres autonomes OTT (respectivement, Canal Play, Now TV, Sky Snap). Le public voulant accéder à son contenu en tout lieu, à tout moment et sur tout appareil [consommation de contenu dite ATAWAD (*any time, anywhere, any device*) ou « mobiquité »), les acteurs traditionnels et les nouveaux arrivants s'adaptent à cette forme de consommation en proposant des offres OTT autonomes. 6

L'expansion du côté de l'offre s'accompagne de changements du côté de la demande. La pénétration de la large bande dans les foyers européens pro-

VoD 5 für die 16 europäischen Länder (14 Mitgliedstaaten der Europäischen Union plus Norwegen und die Schweiz) 2013 auf 1 835 Millionen EUR (T.6.6 und T.6.7). Das ist ein Wachstum von 43,9 % im Vergleich zum Vorjahr und eine durchschnittliche jährliche Wachstumsrate von 31,8 % über einen Zeitraum von fünf Jahren.

Im Bereich Video-on-Demand zeichnet sich eine überaus interessante Entwicklung ab: 2009 beliefen sich die Verbraucherausgaben für TV-VoD noch auf 76,9 % der Gesamtausgaben für VoD (digital und TV-VoD) und für digitales Video über das offene Internet lediglich auf 23,1 %. Dieses Verhältnis hat sich in den letzten fünf Jahren nahezu umgekehrt. 2013 machten die Verbraucherausgaben für digitales Video 60,6 % der Gesamtausgaben für VoD aus, während der Anteil der Ausgaben für TV-VoD auf 39,4 % der Gesamtausgaben zurückgegangen war. Diese Veränderungen sind überaus aufschlussreich: 2009 entfielen mehr als ¾ der Verbraucherausgaben für VoD auf so genannte „managed Networks" (wie Pay-TV-Anbieter, Kabelnetze) und weniger als ¼ auf das offene Internet (oder „Over-the-Top" – OTT). 2012 waren die Verbraucherausgaben für digitales Video über das offene Internet höher als für TV-VoD, und dieser Trend hat sich 2013 noch verstärkt. Untersucht man die jährlichen Wachstumsraten für die beiden Kategorien von Verbraucherausgaben für VoD (G.6.4), wird der Trend noch deutlicher: Über den untersuchten Zeitraum 2009 – 2013 nahm TV-VoD zwischen 15,7 % und 25,8 % jährlich zu (das ist eine durchschnittliche jährliche Wachstumsrate von 15,3 % über die letzten 5 Jahre). Digitales Video über das offene Internet wuchs dagegen zwischen 57,9 % und 100,8 % jährlich (das ist eine durchschnittliche jährliche Wachstumsrate von 59,9 % über die letzten fünf Jahre).

Der Trend geht also eindeutig in Richtung auf digitales Video über das offene Internet (oder OTT-VoD Dienste). Dieser Trend wird noch zusätzlich verstärkt durch die Tatsache, dass Anbieter von OTT-VoD wie Netflix oder wuaki.tv 2014 auf neue europäische Märkte vorgedrungen sind und dass traditionelle Anbieter wie Canal+, BSkyB oder Sky Deutschland mit dem Ausbau ihrer Stand-alone-OTT-Angebote begonnen haben. Da die Zuschauer immer größeren Wert darauf legen, überall, jederzeit und auf jedem Gerät Zugang zu audiovisuellen Inhalten zu haben (oder „ATAWAD" – anywhere, anytime, any device), sind sowohl die traditionellen Anbieter als auch neue Marktteilnehmer bemüht, sich an diese Form des Konsums anzupassen und immer häufiger Stand-alone-OTT-Angebote anzubieten 6

Der Ausweitung des Angebots stehen Veränderungen auf der Nachfrageseite gegen-

4 The purchase or rental of movies and TV series delivered over the open internet through transactional models (also known as EST, DTO, Internet VoD) or on subscription basis. Also referred to as "Over-the-Top" (OTT) video-on-demand.

5 The delivery of movies and TV content on a transactional (VoD, NVoD/PPV) basis via cable/satellite/IPTV services.

6 The announcement in the second half of 2014 by HBO and CBS of the launch of a stand-alone OTT offer of their services underlines further this trend towards OTT delivery.

Open Internet. Consumers in Europe are becoming more equipped with mobile connected devices (tablets and smart phones), Smart TVs and, although equipment figures are not available in this edition of the Yearbook, new forms of connected devices such as digital media players (e.g. AppleTV, Roku media player, Amazon Fire TV...) and connected HDMI dongles (Google's Chromecast, Amazon's Fire TV Stick, Mozilla's Matchstick, Microsoft's Wireless Display Adapter) which will further increase the consumption of online and on-demand content. The fact that OTT video can be displayed without much difficulty on the big screen (TV) using these new technologies or consumed on a mobile device, will further enable European consumers to watch online on-demand video on the Open Internet and drive consumer spend on digital video delivered through the Open Internet.

Evolution in national markets

Consumer spend for digital video delivered on the open Internet has surpassed consumer spend on TV VoD in 10 of the 16 countries for which IVF provided market figures in 2013. However, in 6 countries consumer spend on TV VoD is still higher than on digital video. This is the case in Belgium, France, Italy, the Netherlands, Poland and Portugal. In France, where the share of IPTV households is the highest in Europe, the consumption of ODAS via dedicated set-top boxes of Internet Service Providers is still dominating on-demand video consumption, but the gap is closing. On the other hand, in the Netherlands, Poland and Portugal, the gap between consumer spend on digital video and TV VoD has widened during the 5 year period. In the Netherlands and Belgium, the high penetration of cable and IPTV could explain this gap between OTT video on-demand and TV VoD. The rather low penetration rate of broadband connections in the households of Portugal and Poland are an explanation for the dominance of consumer spend on TV VoD in those countries. As households with broadband connections increase, consumer spend on digital video will follow. Italy was in 2013 the only European country according to IVF figures that experienced a decrease in consumer spend on TV VoD (-10%) and also digital video (-0.4%). The reason for this drop is a definitional change in reporting; Mediaset stopped its digital subscription service and bundled it with its traditional pay TV subscription service which is not tracked by IVF/IHS. Spain, where consumer spend on TV VoD experienced a strong downfall with a decrease of -17% in 2013 compared to 2012, has on the other hand experienced a strong growth in consumer spend on digital video with

gresse, facilitant la mise à disposition de la vidéo sur l'internet ouvert. Les consommateurs européens utilisent de plus en plus des appareils mobiles connectés (tablettes et smartphones), des téléviseurs connectés et, bien que les chiffres d'équipement ne soient pas disponibles pour cette édition de l'Annuaire, de nouvelles formes d'appareils connectés telles que lecteurs de médias numériques (par exemple, AppleTV, lecteur multimédia Roku, Amazon Fire TV...) et clés DMI connectées (« dongles » : Chromecast de Google, Fire TV Stick d'Amazon, Matchstick de Mozilla, Wireless Display Adapter de Microsoft), ce qui aura pour effet d'augmenter encore davantage la consommation de contenu en ligne et à la demande. Le fait que la vidéo OTT puisse être affichée sans trop de difficultés sur le grand écran (TV) à l'aide de ces nouvelles technologies ou consommée sur un appareil mobile permettra en outre aux consommateurs européens de regarder la vidéo à la demande en ligne sur l'internet ouvert et fera progresser les dépenses de consommation en vidéo numérique mise à disposition sur l'internet ouvert.

Evolution sur les marchés nationaux

Les dépenses en vidéo numérique mise à disposition sur l'internet ouvert dépassent les dépenses en VoD TV dans 10 des 16 pays pour lesquels l'IVF a fourni des chiffres sur le marché en 2013. Toutefois, dans six pays, les dépenses de consommation en VoD TV restent supérieures à celles en vidéo numérique. C'est le cas en Belgique, en France, en Italie, aux Pays-Bas, en Pologne et au Portugal. En France, où la part des foyers IPTV est la plus élevée d'Europe, la consommation d'ODAS par l'intermédiaire des décodeurs dédiés de fournisseurs d'accès internet continue de dominer la consommation de vidéo à la demande, mais l'écart se resserre. En revanche, aux Pays-Bas, en Pologne et au Portugal, l'écart entre les dépenses en vidéo numérique et en VoD TV s'est creusé au cours de la période de 5 ans. Aux Pays-Bas et en Belgique, la forte pénétration du câble et de l'IPTV pourrait expliquer cet écart entre vidéo à la demande OTT et VoD TV. Le taux de pénétration relativement faible des connexions à large bande dans les foyers du Portugal et de la Pologne peut expliquer la prépondérance des dépenses de consommation en VoD TV dans ces pays. Alors que le nombre de foyers équipés de connexions à large bande augmentera, les dépenses en vidéo numérique suivront. Selon les chiffres de l'IVF, l'Italie est, en 2013, le seul pays européen dont les dépenses en VoD TV et en vidéo numérique ont diminué (respectivement -10 % et -0,4 %). Cette baisse est due à un changement de définition dans les rapports : Mediaset a cessé son service numérique par abonnement et l'a associé à son service de télévision payante classique par abonnement qui n'est pas suivi par IVF/IHS. L'Espagne, où les dépenses de consommation en VoD TV subissent une forte chute en 2013, -17 % par rapport à 2012,

über. Die Zahl der Breitbandanschlüsse in europäischen Haushalten wächst kontinuierlich und ermöglicht eine problemlose Übertragung von Videos über das offene Internet. Die Verbraucher in Europa verfügen immer häufiger über mobile vernetzte Geräte (Tablet-PCs und Smartphones), Smart TV-Geräte und über neue Formen vernetzter Geräte wie digitale Media Player (z. B AppleTV, etc.) sowie vernetzte HDMI-Dongles (Chromecast von Google, etc.), obwohl in dieser Ausgabe keine Daten über die Ausstattung der Haushalte mit diesen Geräten zur Verfügung stehen. Dies wird dazu beitragen, dass der Online-Konsum und der Konsum von Abrufinhalten in Zukunft weiter steigen wird. Die Tatsache, dass OTT-Videos mit Hilfe dieser neuen Technologien auch problemlos auf großen Bildschirmen (Fernsehbildschirmen) oder auf mobilen Geräten abgespielt werden können, wird die europäischen Verbraucher noch stärker in die Lage versetzen, Video-on-Demand online über das offene Internet zu empfangen, und dies wird die Verbraucherausgaben für digitales Video über das offene Internet noch stärker in die Höhe treiben.

Entwicklung auf nationalen Märkten

In 10 der 16 Länder, für die IVF-Marktdaten für das Jahr 2013 zur Verfügung stehen, waren die Verbraucherausgaben für digitales Video über das offene Internet bereits höher als die Ausgaben für TV-VoD. Nur in 6 Ländern ist dies nicht der Fall. In Belgien, Frankreich, Italien, den Niederlanden, Polen und Portugal sind die Verbraucherausgaben für TV-VoD immer noch höher als für digitales Video. In Frankreich, wo der Anteil an Haushalten mit IPTV am höchsten in Europa ist, dominiert nach wie vor der Konsum von audiovisuellen Abrufdiensten über Set-top-Boxen von Internet Service-Providern, aber die Lücke schließt sich allmählich. In den Niederlanden, Polen und Portugal ist der Unterschied zwischen den Verbraucherausgaben für digitales Video und TV-VoD in den letzten fünf Jahren sogar größer geworden. Ein Grund für diese Entwicklung könnte die starke Verbreitung von Kabelfernsehen und IPTV in den Niederlanden und Belgien sein. In Portugal und Polen ist dagegen der Anteil der Haushalte mit Breitbandanschlüssen noch immer niedrig, und dies könnte erklären, warum die Verbraucherausgaben für TV-VoD in diesen Ländern immer noch höher sind. Mit der Zunahme der Haushalte mit Breitbandanschluss werden auch in diesen Ländern die Verbraucherausgaben für digitales Video steigen. Italien war 2013 das einzige europäische Land, in dem IVF-Angaben zufolge die Verbraucherausgaben für TV-VoD (-10 %) und für digitales Video (-0,4 %) zurückgegangen sind. Die Gründe für diesen Rückgang dürften Änderungen bei der Datenerfassung sein. Mediaset hat seinen digitalen Abonnement-Dienst eingestellt und ihn mit seinem traditionellen Abonnement-Service für Pay-TV gekoppelt, der jedoch nicht von IVF/IHS erfasst wird. In Spanien, wo die Verbraucherausgaben an increase of 91.9% in 2013, above the European average. The countries in which consumer spend on digital video surpasses consumer spend on TV VoD are markets with rather important OTT on-demand video services and high levels of broadband penetration, which is especially the case for the United Kingdom, Norway, Sweden, Denmark, Finland and Germany.

Shrinking overall market value for European Home entertainment consumer spend

Another key finding is represented in the graphics G.6.6 and G.6.7: the evolution of consumer spend on home entertainment (physical video and total VoD). The overall market value for consumer spend is shrinking, decreasing from 9 179.6 EUR million in 2009 to 8 054.6 EUR million in 2013, or a loss of -12.25% over 5 years (with a negative compound annual growth rate of -2.5%). Even if consumer spend on both categories of VoD (Open Internet and TV VoD) is growing by double-digit percentages throughout the last 5 years, this has not offset the shrinking of the physical video market. As graphic G.6.4 shows, the negative growth rates of consumer spend on physical video have been accelerated yearly; while the market shrunk by -3.3% in 2009/10, it shrunk by -12.5% in 2012/13. The decline of consumer spend on physical video is accelerating in every country, with the exception of Germany where consumers almost spend the same amount on physical video in 2013 as in 2009 (1 618.5 EUR million in 2013, 1 637.0 EUR million in 2009).

The proportion of consumer spend on VoD (digital video and TV VoD) in the overall consumer spend for home entertainment (VoD and physical video) (G.6.7) grew during the considered time period from 5% in 2009 to 22.8% in 2013, the share of consumer spend on physical video shrinking from 95% to 77.2% in the same period. European consumers are shifting their expenses for home entertainment towards digital formats, which does not offset the general decrease of the physical retail and rental market for video.

The European on-demand audiovisual service market is a heterogeneous one, each country presenting different market characteristics (broadband penetration, number of services available, inclination of consumers to pay for digital services, household equipment figures in connected devices...) which renders a pan-European analysis difficult. Nevertheless, some general market developments and tendencies can be observed: the rise of Subscription Video-on-Demand (SVoD) offers and adoption by European consumers; and the increased interest of traditional broadcasters and media groups in the YouTube ecosystem of Multi-Channel Networks

connaît d'autre part une forte croissance des dépenses de consommation en vidéo numérique avec une augmentation de 91,9 % en 2013, supérieure à la moyenne européenne. Les pays dans lesquels les dépenses en vidéo numérique surpassent les dépenses en VoD TV sont des marchés avec des services de vidéo à la demande OTT plutôt importants et des niveaux élevés de pénétration de la large bande, ce qui est particulièrement le cas pour le Royaume-Uni, la Norvège, la Suède, le Danemark, la Finlande et l'Allemagne.

Contraction de la valeur de marché globale pour les dépenses en divertissement à domicile en Europe

Une autre constatation clé est représentée sur les graphiques G.6.6 et G.6.7 : l'évolution des dépenses en divertissement à domicile (vidéo physique et VoD totale). La valeur de marché globale des dépenses de consommation est en baisse, de 9 179,6 millions EUR en 2009 à 8 054,6 millions EUR en 2013, soit une perte de -12,25 % sur 5 ans (avec un taux de croissance annuel composé négatif de -2,5 %). Même si les dépenses de consommation dans les deux catégories de VoD (internet ouvert et VoD TV) progressent d'un pourcentage à deux chiffres ces 5 dernières années, cette hausse ne compense pas la contraction du marché de la vidéo physique. Comme le montre le graphique G.6.4, les taux de croissance négatifs des dépenses en vidéo physique ont accéléré chaque année : tandis que le marché s'est contracté de -3,3 % en 2009/10, il recule de -12,5 % en 2012/13. La baisse des dépenses de consommation en vidéo physique s'accélère dans tous les pays, à l'exception de l'Allemagne où les consommateurs dépensent presque autant en vidéo physique en 2013 qu'en 2009 (respectivement 1 618,5 millions EUR et 1 637,0 millions EUR).

La proportion des dépenses de consommation en VoD (vidéo numérique et VoD TV) par rapport aux dépenses globales en divertissement à domicile (VoD et vidéo physique) (G.6.7) a augmenté au cours de la période considérée, passant de 5 % en 2009 à 22,8 % en 2013, la part des dépenses de consommation en vidéo physique diminuant de 95 % à 77,2 % sur la même période. Les consommateurs européens consacrent leurs dépenses en divertissement à domicile à des formats numériques, ce qui ne compense pas la baisse générale du marché physique de location et de vente au détail pour la vidéo.

Le marché européen des services audiovisuels à la demande est hétérogène, chaque pays présentant différentes caractéristiques (pénétration de la large bande, nombre de services disponibles, inclinaison des consommateurs à payer pour des services numériques, équipement des foyers en appareils connectés...), ce qui rend difficile une analyse pan-européenne. Néanmoins, certaines évolutions et tendances générales du marché peuvent être observées : la montée des offres de vidéo à la demande

für TV-VoD 2013 drastisch zurückgegangen sind (-17 % in 2013 im Vergleich zu 2012), gab es dagegen ein starkes Wachstum bei den Verbraucherausgaben für digitales Video: 91,9 % im Jahr 2013, mehr als im europäischen Durchschnitt. Die Länder, in denen die Verbraucherausgaben für digitales Video höher waren als die Ausgaben für TV-VoD, sind Märkte mit bedeutenden OTT-VoD-Diensten und einer hohen Breitbandpenetration. Dies ist vor allem der Fall im Vereinigten Königreich, in Norwegen, Schweden, Dänemark, Finnland und Deutschland.

Sinkende Marktwerte bei den Verbraucherausgaben für Home Entertainment in Europa

Eine weitere wichtige Entwicklung zeigen die Abbildungen G.6.6 und G.6.7: die Veränderungen bei den Verbraucherausgaben für Home Entertainment (physisches Video und VoD). Der Gesamtmarktwert der Verbraucherausgaben für Home Entertainment sinkt: Zwischen 2009 und 2013 sind die Ausgaben von 9 179,6 Millionen EUR auf 8 054,6 Millionen EUR zurückgegangen, ein Rückgang um 12,25 % über 5 Jahre (mit einer durchschnittlichen negativen Wachstumsrate von -2,5 %). Obwohl die Verbraucherausgaben für beide Kategorien von VoD (offenes Internet und TV-VoD) in den letzten fünf Jahren ein zweistelliges Wachstum aufgewiesen haben, reicht dieses nicht aus, um den Rückgang beim Markt für physische Videos auszugleichen. Wie Abbildung G.6.4 zeigt, haben sich die negativen Wachstumsraten bei den Verbraucherausgaben für physisches Video von Jahr zu Jahr beschleunigt. 2009/2010 schrumpfte der Markt um -3,3 %, 2012/13 bereits um -12,5 %. Die Verbraucherausgaben für physisches Video sind in allen Ländern rapide zurückgegangen, mit Ausnahme von Deutschland, wo die Verbraucher 2013 fast genau so viel für physisches Video ausgegeben haben wie 2009 (1 618,5 Millionen EUR 2013, 1 637,0 Millionen EUR 2009).

Der Anteil der Verbraucherausgaben für VoD (digitales Video und TV-VoD) an den Gesamtverbraucherausgaben für Home Entertainment (VoD und physisches Video) (G.6.7) wuchs in dem untersuchten Zeitraum von 5 % im Jahr 2009 auf 22,8 % im Jahr 2013, der Anteil an den Verbraucherausgaben für physisches Video ging dagegen im selben Zeitraum von 95 % auf 77,2 % zurück. Europäische Verbraucher verlagern ihre Ausgaben für Home Entertainment immer mehr auf digitale Formate, eine Entwicklung, die allerdings nicht den Rückgang auf dem Markt für den Verkauf und den Verleih von physischen Videos ausgleichen kann.

Der europäische Markt für audiovisuelle Abrufdienste ist ein sehr heterogener Markt. Jedes Land hat seine eigenen Marktcharakteristika (Zahl der Breitbandanschlüsse, Zahl der vorhandenen VoD-Anbieter, die Bereitschaft der Zuschauer, für digitale Dienste zah-

(MCN). The expansion of Netflix into 6 European countries in 2014 (Germany, France, Austria, Belgium, Luxembourg, Switzerland) following the launch in the Netherlands in 2013, has put the focus on digital subscriptions as this format seems appealing to European consumers and experienced the strongest growth in consumer spend.

Subscription Video-on-Demand on the rise

Consumer spend on digital video subscription had the strongest growth among the different digital video formats (Transactional Video-on-Demand [7] – retail and rental, Electronic sell-through) in Europe in 2013, reinforced by the rise of OTT SVoD service providers such as Netflix, Amazon, CanalPlay, HBO, wuaki.tv to only name a few players on the different European SVoD markets. According to the IVF Yearbook 2014, consumer spending on OTT SVoD services increased by 147.5% in 2013 to 520.9 EUR million in Europe.

In the United Kingdom, OTT SVoD consumer spend grew by 123.7% in 2013, to a total of 233 EUR million making it the most important platform for video delivered on the Open Internet (representing 36.7% of total digital video consumer spend and even 9.3% of the total video market in the United Kingdom) as well as being the fastest growing platform. In Germany, consumer spend on OTT SVoD is also the fastest growing sector, with an increase from 19.9 EUR million in 2012 to 45.9 EUR million in 2013, an increase by +130.7%. The IVF Yearbook 2014 further states that OTT SVoD consumer spend in the Nordics grew by 266.9% in 2013 to 148 EUR million, representing 17.6% of total consumer spend on video (physical and digital) in those 4 countries.

The rapid take-up of subscriptions to Video-on-demand services in Europe can be explained by several factors, the most important being the expansion of SVoD offers by international corporations, namely Netflix and Amazon (Instant Video, formerly LoveFilm in Germany and the United Kingdom). SVoD services existed in the most important markets before the entry of those two SVoD service providers but their marketing strategies (with an aggressive promotion of their services, which allowed the general public to be informed of the existence of SVoD services) coupled with attractive content, multi-screen availability, exploitation of "Big data" for recommendation tools and ease of use has appealed to European customers.

par abonnement (*subscription video-on-demand* - SVoD) et leur adoption par les consommateurs européens ; et l'intérêt croissant des radiodiffuseurs et groupes de médias traditionnels pour l'écosystème YouTube des réseaux multicanaux (*multi-channel network* - MCN). L'expansion de Netflix dans 6 pays européens en 2014 (Allemagne, France, Autriche, Belgique, Luxembourg, Suisse) après son lancement aux Pays-Bas en 2013, a mis en lumière les abonnements numériques. Ce format semble intéressant pour les consommateurs européens et a connu la plus forte croissance des dépenses de consommation.

Progression de la vidéo à la demande par abonnement

En 2013, les dépenses de consommation en abonnement à la vidéo numérique qui connaissent la plus forte croissance en Europe sont le format vidéo numérique (vidéo à la demande transactionnelle [7] - vente au détail et location, vente électronique (*electronic sell-thru* - EST)), renforcé par l'augmentation du nombre de prestataires de services de SVoD OTT tels que Netflix, Amazon, CanalPlay, HBO et wuaki.tv pour ne citer que quelques acteurs sur les différents marchés européens de la SVoD. Selon l'IVF Yearbook 2014, les dépenses de consommation en services de SVoD OTT ont augmenté de 147,5 % en 2013, pour atteindre 520,9 millions EUR en Europe.

Au Royaume-Uni, les dépenses de consommation en SVoD OTT ont augmenté de 123,7 % en 2013, pour atteindre 233 millions EUR, ce qui en fait la plateforme la plus importante pour la vidéo mise à disposition sur l'internet ouvert (représentant 36,7 % du total des dépenses de consommation en vidéo numérique et même 9,3 % du marché total de la vidéo au Royaume-Uni) ainsi que la plate-forme ayant la plus forte croissance. En Allemagne, les dépenses en SVoD OTT sont aussi le secteur le plus dynamique, passant de 19,9 millions EUR en 2012 à 45,9 millions EUR en 2013, soit une augmentation de +130,7 %. L'IVF Yearbook 2014 indique en outre que les dépenses en SVoD OTT dans les pays nordiques ont progressé de 266,9 % en 2013 à 148 millions EUR, soit 17,6 % du total des dépenses de consommation en vidéo (physique et numérique) dans ces quatre pays.

L'adoption rapide des services de vidéo à la demande par abonnement en Europe peut s'expliquer par plusieurs facteurs, le principal étant l'expansion des offres SVoD de sociétés internationales, à savoir Netflix et Amazon (Instant Video, anciennement LoveFilm en Allemagne et au Royaume-Uni). Les services de SVoD existaient dans les marchés les plus importants avant l'arrivée de ces deux fournisseurs mais les stratégies de marketing de ces derniers (basées sur une promotion agressive de leurs services qui a permis au grand public

len, die Ausstattung der Haushalte mit vernetzten Geräten usw.), und dies macht eine gesamteuropäische Analyse schwierig. Trotzdem lassen sich einige allgemeine Marktentwicklungen und –tendenzen feststellen: die Zunahme von Angeboten für Video-on-Demand-Abonnements - (SVoD) und die Akzeptanz durch die europäischen Verbraucher, aber auch das zunehmende Interesse traditioneller Rundfunkveranstalter und Mediengruppen an dem YouTube-Ökosystem von Mehrkanal-Netzwerken (MCN). Nachdem Netflix nach dem Start in den Niederlanden 2013 sein Angebot 2014 auf 6 weitere europäische Länder ausgedehnt hat (Deutschland, Frankreich, Österreich, Belgien, Luxemburg, Schweiz), haben digitale Abonnements noch mehr an Bedeutung gewonnen. Dieses Format scheint für die europäischen Verbraucher offensichtlich besonders attraktiv zu sein und kann das stärkste Wachstum bei den Verbraucherausgaben aufweisen.

Video-on-Demand-Abonnements auf dem Vormarsch

Das stärkste Wachstum bei den Verbraucherausgaben für die unterschiedlichen Videoformate (Transactional Video-on-Demand (TVoD) [7] - Verkauf und Verleih, Electronic-Sell-Through) wiesen 2013 in Europa die Ausgaben für das Abonnement von digitalen Videos auf. Dazu dürfte vor allem die Zunahme der Anbieter von OTT-SVoD-Diensten wie Netflix, Amazon, CanalPlay, HBO, wuaki.tv und anderen beigetragen haben, um nur einige wenige Namen auf den einzelnen europäischen SVoD-Märkten zu nennen. Laut IVF-Jahrbuch 2014 stiegen die Verbraucherausgaben für OTT-SVoD im Jahr 2013 um 147,5 % auf 520,9 Millionen EUR.

Im Vereinigten Königreich stiegen die Verbraucherausgaben für OTT-SVoD 2013 um 123,7 % auf insgesamt 233 Millionen EUR. Damit ist SVoD die mit Abstand bedeutendste Form des Videokonsums über das offene Internet (36,7 % der Gesamtausgaben für digitales Video und immer noch 9,3 % des gesamten Videomarktes im Vereinigten Königreich) und die am schnellsten wachsende Plattform. In Deutschland ist OTT-SVoD ebenfalls der am schnellsten wachsende Sektor. Die Verbraucherausgaben für SVoD stiegen von 19,9 Millionen EUR 2012 auf 45,9 Millionen EUR 2013, das ist ein Plus von 130,7 %. Aus dem IVF Jahrbuch 2014 geht auch hervor, dass die Verbraucherausgaben für OTT-SVoD 2013 in den nordeuropäischen Ländern um 266,9 % auf 148 Millionen EUR gestiegen sind, das sind 17,6 % der gesamten Verbraucherausgaben für Video (physisches oder digitales Video) in diesen 4 Ländern.

Die rasche Akzeptanz von VoD-Abonnementangeboten in Europa lässt sich durch mehrere Faktoren erklären. Der wichtigste dürfte die Ausweitung von

[7] According to the IVF Yearbook 2014, transactional digital rental increased by 43.1% to 287.5 EUR million and transactional digital retail increased by 37% to 375 EUR million in 2013.

Netflix and Amazon decided to expand first to the countries which presented the most favourable market conditions for digital services, such as high broadband penetration in households, high level of equipment in connected devices, a rather mature digital economy (e-commerce, offer of digital media) and a tech-savvy population. The fact that English was widely spoken in the first markets had certainly also a role to play (Nordics and the Netherlands are generally used to English audiovisual content whereas France and Germany require more content in national languages or dubbing, and subtitling which is the habit of watching audiovisual content in English is not as widespread as in the Nordics or in the Netherlands).

On the SVoD market it could be inferred that supply may drive consumer adoption. The impressive growth rates after the entry of a major player on a given national market tend to demonstrate that the "appetite" of the audience for a subscription-based video-on-demand service existed before but was hardly served by national players, who often improved their SVoD offer in the light of Netflix's market entry.

A good example for this hypothesis is the growth rate of the OTT SVoD market in the United Kingdom after the entry of Netflix and the acquisition of LoveFilm by Amazon in late 2011: according to the British Video Association Yearbook 2013, the market grew in 2012 by an astonishing 2 000%, to £84 million (in 2011, the market amounted to a mere £3.8 million for digital subscriptions). In 2013, the sector increased by +120% compared to 2012 to £196 million in consumer spending for digital video subscriptions (this amount was generated by 3 services in the United Kingdom; Netflix, Amazon and Sky's Now TV). These growth rates are not typical in other business sectors and they suggest that demand existed but was not served (or not well served) by the existing supply.

Those new entrants have served the audience with appealing content, ease of use and accessibility on every device. This is another main point and competitive advantage on the SVoD market: access to premium content in order to appeal to and retain customers.

The battle for content, particularly exclusive rights and the acquisition and production of original content, lies at the heart of the battle for subscribers among SVoD services. With the expansion of international SVoD services in Europe, the entrance of existing media players into the OTT SVoD service market such as the services announced by HBO and CBS in October 2014, the supply of SVoD services seems to be burgeoning and the competition of SVoD services for attractive and premium content will intensify.

d'être informé de l'existence des services de SVoD) couplées à un contenu attractif, à la mise à disposition multi-écran, à l'exploitation des mégadonnées (*big data*) pour les outils de recommandation et à la facilité d'utilisation ont suscité l'intérêt des clients européens.

Netflix et Amazon ont décidé de se développer d'abord dans les pays qui présentaient les conditions de marché les plus favorables pour les services numériques, telles que la forte pénétration de la large bande dans les foyers, le niveau élevé d'équipement en appareils connectés, une économie numérique plutôt mature (commerce électronique, offre de médias numériques) et une population adepte des nouveautés technologiques. Le fait que l'anglais soit largement parlé dans les premiers marchés a certainement aussi joué un rôle (les pays nordiques et les Pays-Bas sont généralement habitués aux contenus audiovisuels en anglais alors que la France et l'Allemagne exigent plus de contenu dans les langues nationales ou un doublage, le sous-titrage qui est le mode habituel de visionnage de contenu audiovisuel en anglais n'étant pas aussi répandu que dans les pays nordiques ou les Pays-Bas).

Sur le marché de la SVoD, on peut supposer que l'offre favorise l'adoption par les consommateurs. Les impressionnants taux de croissance du secteur après l'arrivée d'un acteur majeur sur un marché national tendent à démontrer que l'« appétit » du public pour un service de vidéo à la demande par abonnement existait auparavant, mais n'était pas satisfait par les acteurs nationaux, lesquels ont souvent amélioré leur offre SVoD après l'entrée sur le marché de Netflix.

Un bon exemple de cette hypothèse est le taux de croissance du marché de la SVoD OTT au Royaume-Uni après l'arrivée de Netflix et l'acquisition de LoveFilm par Amazon fin 2011 : selon le Yearbook 2013 de la British Video Association, le marché a progressé en 2012 d'un étonnant 2 000 %, à 84 millions GBP (en 2011, le marché n'était que de 3,8 millions GBP pour les abonnements numériques). En 2013, le secteur a augmenté de +120 % par rapport à 2012 avec 196 millions GBP de dépenses de consommation en abonnements vidéo numériques (ce montant a été généré par les trois services disponibles au Royaume-Uni : Netflix, Amazon et Now TV de Sky). Ces taux de croissance ne sont pas habituels dans d'autres secteurs d'activité et suggèrent que la demande existait, mais n'était pas satisfaite (ou pas correctement satisfaite) par l'offre existante.

Ces nouveaux venus ont offert au public un contenu attrayant, la facilité d'utilisation et l'accessibilité sur tous les appareils. Il s'agit là d'un autre point important et d'un avantage concurrentiel sur le marché de la SVoD : permettre un accès à du contenu premium pour attirer et fidéliser les clients.

La bataille pour le contenu, en particulier l'obtention de droits exclusifs ainsi que l'acquisition et la production de contenu original, est au cœur de la lutte pour

SVoD-Angeboten durch internationale Kooperationen sein, vor allem Netflix und Amazon. SVoD-Angebote gab es auf den bedeutendsten Märkten zwar schon vor dem Markteintritt von Netflix und Amazon, aber die Marktstrategien dieser beiden Unternehmen (mit einer aggressiven Werbung für ihre Angebote, die die Öffentlichkeit stärker für die Existenz solcher SVoD-Dienste sensibilisiert hat) gekoppelt mit attraktiven Inhalten, der Multiscreen-Verfügbarkeit, der Verwertung von „Big data" für Empfehlungstools und größere Benutzerfreundlichkeit haben offensichtlich die europäischen Verbraucher überzeugt.

Netflix und Amazon haben beschlossen, ihr Angebot zuerst auf die Länder auszuweiten, welche die günstigsten Marktbedingungen für digitale Dienste bieten, also eine hohe Breitbandpenetration in den Haushalten, eine hohe Ausstattung mit vernetzten Geräten, eine reife digitale Wirtschaft (elektronischer Handel, Angebot digitaler Medien) und technisch versierte Kunden. Die Tatsache, dass auf diesen ersten Märkten die Kunden weitgehend die englische Sprache beherrschen, dürfte ebenfalls eine nicht geringe Rolle gespielt haben.

Auch für den SVoD-Markt könnte man davon ausgehen, dass das Angebot die Verbraucherakzeptanz erhöht. Die eindrucksvollen Wachstumsraten für die großen Anbieter auf einem bestimmten nationalen Markt demonstrieren, dass der „Hunger" der Zuschauer nach VoD-Abonnements schon vorher da war, aber kaum von den nationalen Playern gestillt werden konnte, die ihr Angebot häufig erst nach dem Markteintritt von Netflix verbessert haben.

Dass diese Hypothese alles andere als abwegig ist, zeigen die astronomischen Wachstumsraten, die der OTT-SVoD-Markt im Vereinigten Königreich nach dem Markteintritt von Netflix und der Übernahme von LoveFilm durch Amazon Ende 2011 erzielt hat: Angaben des British Video Association Yearbook 2013 zufolge wuchs der Markt 2012 um sage und schreibe 2 000 % auf 84 Millionen £ (2011 lag der Markt lediglich bei 3,8 Millionen £ für VoD-Abonnements). 2013 lag die Wachstumsrate bei +120 % gegenüber 2012. Die Ausgaben für das Abonnement von digitalen Videos beliefen sich 2013 auf 196 Millionen £ (dieser Betrag wurde von lediglich 3 Anbietern im Vereinigten Königreich erwirtschaftet: Netflix, Amazon und Sky's Now TV). Solche Wachstumsraten sind alles andere als typisch für andere Wirtschaftssektoren, und sie legen den Schluss nahe, dass die Nachfrage schon vorher vorhanden war, dass sie bisher jedoch nicht (oder nicht ausreichend) befriedigt werden konnte.

Diese neuen Marktteilnehmer bieten den Zuschauern attraktivere Inhalte, größere Benutzerfreundlichkeit und Zugänglichkeit auf jedem Gerät. Ein weiterer wichtiger Pluspunkt und ein Wettbewerbsvorteil auf dem SVoD-Markt ist der Zugang zu Premium-Inhalten, um Kunden zu gewinnen und an das Unternehmen zu binden.

On-demand audiovisual services

Regarding the digital video subscription market, several drivers of growth for SVoD services exist, of which the most important are:

- Availability of premium content on SVoD services which leads to an increased competition for the acquisition of exclusive rights for premium content such as TV shows and movies.
- Increased acquisition and commissioning of “original content” by SVoD players in order to differentiate themselves from the competition.
- Attractive offers (premium content, large choice of TV shows and films) which serves an existing but not satisfied demand as the rapid uptake of SVoD services in the UK and the Nordics seem to indicate after the entry of international OTT SVoD services (Netflix and Amazon).
- Changing consumption patterns by the audience for audiovisual content: increased viewing on “own schedule” and binge viewing of TV shows (available often by entire seasons on SVOD services).
- Increased use of “big data” analytics for recommendation tools to retain subscribers and in order to commission and acquire content based on insights gathered from subscribers’ preferences for audiovisual content.
- Multi-device and multi-screen availability by SVoD offers serve a new way of audiovisual consumption – ATAWAD – Any Time, Any Where, Any Device.

The years 2013 and 2014 have seen consumer spend on video-on-demand services increase drastically in Europe, digital video on the Open Internet being the format of VoD services which grew the strongest, and in this format OTT SVoD services experienced their strongest growth in the main European markets. The changes on the supply side (increased offers of digital video services on the Open Internet) and demand side (shift in audience consumption habits, increased fixed and mobile broadband penetration in households, rising equipment figures in mobile and connected devices,...) will enhance this tendency in the years to come.

➥ European Audiovisual Observatory

Services audiovisuels à la demande

les abonnés que se livrent les services de SVoD. Avec l’expansion des services internationaux de SVoD en Europe et l’arrivée d’acteurs multimédias existants sur le marché des services de SVoD OTT, tels que les services annoncés par HBO et CBS en octobre 2014, la fourniture de services de SVoD semble être en plein essor et la concurrence que se livrent les services de SVoD pour disposer de contenus attractifs et premium va s’intensifier.

En ce qui concerne le marché de la vidéo numérique par abonnement, il existe plusieurs moteurs de croissance pour les services de SVoD, dont les plus importants sont :

- La disponibilité de contenu premium sur les services de SVoD qui conduit à une concurrence accrue pour l’acquisition de droits exclusifs pour le contenu premium tel que les films et les fictions audiovisuelles.
- L’augmentation de l’acquisition et de la commande de « contenu original » par les acteurs de la SVoD afin de se différencier de la concurrence.
- Des offres attractives (contenu premium, grand choix de films et de séries télévisées) répondant à une demande existante mais insatisfaite, ainsi que semble l’indiquer l’adoption rapide des services de SVoD au Royaume-Uni et dans les pays nordiques après l’arrivée de services internationaux de SVoD OTT (Netflix et Amazon).
- L’évolution des modes de consommation de contenu audiovisuel par le public : visionnage accru en fonction de « ses propres horaires » et visionnage intense de séries télévisées (disponibles souvent par saisons entières sur les services de SVoD).
- L’utilisation accrue de l’analyse des mégadonnées (« big data ») pour les outils de recommandation afin de fidéliser les abonnés et de commander et d’acquérir du contenu basé sur les informations recueillies à partir des préférences des abonnés en matière de contenu audiovisuel.
- La mise à disposition sur plusieurs appareils et plusieurs écrans est au service d’une nouvelle consommation audiovisuelle – ATAWAD – *Any Time, Any Where, Any Device* (n’importe quand, n’importe où, sur n’importe quel appareil).

Les années 2013 et 2014 ont vu les dépenses de consommation en services de vidéo à la demande augmenter considérablement en Europe, la vidéo numérique sur l’internet ouvert étant le format de services de VoD qui a le plus progressé et, au sein de ce format, les services de SVoD OTT ont connu leur plus forte croissance sur les principaux marchés européens. Les changements du côté de l’offre (augmentation des offres de services de vidéo numérique sur l’internet ouvert) et du côté de la demande (changement des habitudes de consommation du public, pénétration accrue de la large bande fixe et mobile dans les foyers, hausse de l’équipement en appareils mobiles et connectés...) renforceront cette tendance dans les années à venir.

Audiovisuelle Abrufdienste in Europa

Der Kampf um Inhalte, vor allem um Exklusivrechte und den Kauf und die Produktion von Originalinhalten, steht im Mittelpunkt des Wettbewerbs um VoD-Abonnenten. Mit der Ausweitung internationaler SVoD-Dienste in Europa scheinen sich immer mehr vorhandene Marktteilnehmer auf dem Markt für OTT-SVoD-Dienste zu engagieren (wie die Dienste, die von HBO und CBS im Oktober 2014 angekündigt wurden), und der Wettbewerb der SVoD-Anbieter um attraktive und Premium-Inhalte wird weiter zunehmen.

Was den Markt für VoD-Abonnements betrifft, so gibt es mehrere Faktoren, die das Wachstum der SVoD-Dienste ankurbeln. Die bedeutendsten sind:

- Angebot von Premium-Inhalten bei SVoD-Diensten – dies führt zu einem verstärkten Wettbewerb um den Erwerb von Exklusivrechten oder Premium-Inhalten wie Fernsehshows und Filmen.
- Verstärkter Kauf von „Originalinhalten” durch SVoD-Anbieter, um sich von ihren Wettbewerbern abzuheben.
- Attraktive Angebote (Premium-Inhalte, große Auswahl von Fernsehshows und -filmen), die eine vorhandene Nachfrage befriedigen, was bisher offensichtlich nicht der Fall war, wie die rasche Akzeptanz von SVoD-Angeboten im Vereinigten Königreich und in den nordischen Ländern nach dem Markteintritt internationaler Anbieter wie Netflix und Amazon vermuten lässt.
- Änderungen der Konsumgewohnheiten bei den Zuschauern: Zunahme von selbst zusammengestellten Inhalten und „Binge Watching“ (Filmmarathon) von Fernsehshows (die häufig das ganze Jahr über von SVoD-Diensten angeboten werden).
- Stärkere Nutzung von „Big Data Analytics” für Empfehlungstools, um die Abonnenten zu halten und um Inhalte zu bestellen und zu kaufen, die auf detaillierten Einblicken in die Verbraucherpräferenzen für audiovisuelle Inhalte basieren.
- Multi-Device- und Multiscreen-Verfügbarkeit von SVoD-Angeboten dienen einer neuen Art von audiovisuellem Konsum – kurz: ATAWAD – Any Time, Any Where, Any Device.

In den Jahren 2013 und 2014 sind die Verbraucherausgaben für Video-on-Demand-Dienste in Europa drastisch gestiegen. Am stärksten gewachsen ist das digitale Video über das offene Internet und innerhalb dieses Formats waren es vor allem OTT-SVoD-Dienste, die auf den wichtigsten europäischen Märkten die höchsten Zuwachsraten aufgewiesen haben. Die Veränderungen auf der Angebotsseite (mehr Angebote von digitalen Video-Diensten über das offene Internet) und auf der Nachfrageseite (geänderte Konsumgewohnheiten, zunehmende Breitbandpenetration, sowohl fest als auch mobil, zunehmende Ausstattung mit mobilen und vernetzten Geräten usw.) werden diese Tendenz in den kommenden Jahren noch verstärken.

T.6.1 Number of on-demand audiovisual services by country of establishment and by genre December 2013

Country	❶ Branded channels on open platforms	❷ Catch up TV services	❸ News/ Portals	❹ VoD Generalist	VoD Music	VoD Films	VoD Films + TV fiction	VoD TV fiction
AT	5	63	16	1	1	6	1	1
BE	8	37	7	9	2	24	2	3
BG	1	12		5	1	5		
CY	2	4		1	1	11		1
CZ	6	38	10	8	9	4	19	1
DE	77	126	8	4	5	26	11	23
DK	5	18	3	1		12	1	2
EE	1	10				3		
ES	32	33	2	6	2	17	1	6
FI	3	5		3		11	1	2
FR	98	148	10		9	40	4	17
GB	236	206	10	18	23	44	2	46
GR	14	16	1			5		1
HR	6	3		1		4	2	
HU	12	62	3			8		
IE	10	7		2	3	2		
IT	62	38	13	1	1	10	1	5
LT	6	5				4		
LU	9	5	17	1		82	3	
LV	3	15				3		
MT	2	4				1		1
NL	44	34		1	1	27	2	2
PL	33	35	2	8	2	18	1	2
PT	11	20		2	1	3		1
RO	16	24		8		3		
SE	3	99	4			29	8	
SI	3	5		2		5		
SK	3	32	6	1		2	2	
Total EU	**711**	**1 104**	**112**	**83**	**61**	**409**	**61**	**114**
AL				1				
BA						3		
CH	3	10		4	3	23		
IS				1				
LI								
ME		1		1				
MK		1		1				
NO	5	41	41			5	3	
RU		30	6	8		19	5	1
TR				3		1		
UA		6	5	4		16	4	
CA								
US		1	4	2	4	124		25

❶ Broadcasters branded channels on Dailymotion, YouTube,… established in the country.
❷ Catch-up TV services or promotional web services by broadcasters of the country or targeting the country.
❸ Portals such as MSN, Yahoo! and video pages of newspapers websites.
❹ VoD services accessible in the country providing a mix of films and various categories of TV programmes.
❺ Services providing access to sport events or archives of sports events.
❻ Includes only services registered by a regulatory authority or part of the line-up of of a distribution platform.

	VoD Documentary	VoD Children/ Animation	Film / TV archives	Film trailers	❺ Sport	VoD Lifestyle	VoD General Interest	VoD Short movies	❻ VoD Adult	Various	*Total*
		1			5	1				17	***118***
		3	1	3	2		1		4	9	***115***
										1	***25***
		1			1						***22***
		4	1	1	8	4			2	10	***125***
	7	13	2	10	5	7	1			5	***330***
				9							***51***
											14
	1		1	3	4					1	***109***
			1						2		***28***
	9	22	2	11	5	12	19	2	14	12	***434***
	17	29	4	3	19				16	9	***682***
	1			1							***39***
											16
		1	1							3	***90***
		1						1			***26***
	3	2	2	4	2					7	***151***
											15
		3							1		***121***
											21
											8
		2	4		2				1		***120***
			4		1				1	5	***112***
		2									***40***
					1						***52***
			1		6				1	2	***153***
	1	1							3		***20***
		1				1				3	***51***
	39	**86**	**24**	**45**	**61**	**25**	**21**	**3**	**45**	**84**	***3 088***
											1
											3
			2	1							***46***
											1
											0
											2
											2
			1						1		***97***
		2	1							2	***74***
											4
											35
									2		***2***
	6	16		1	12	7	9		2	10	***223***

➥ European Audiovisual Observatory / MAVISE database

T.6.2 Number of legal VoD services available by country in Europe
December 2013

A service may be counted in two or several countries.

Country	❶ Generalist	❷ Film + Fiction	❸ Films	❹ Fiction	❺ Children	Docu-mentaries	General interest	Lifestyle	Music	❻ Sport	Total
AT	2	2	34	8	9	2	9	7	8	0	*81*
BE (CFB)	11	0	42	11	7	1	9	6	9	0	*96*
BE (DSG)	4	0	32	8	7	2	10	6	7	0	*76*
BE (VLG)	10	0	41	10	7	1	10	6	5	0	*90*
BG	5	1	7	0	0	0	0	0	1	0	*14*
CY	1	0	10	8	2	0	9	6	4	0	*40*
CZ	8	2	6	1	3	0	0	4	5	3	*32*
DE	8	12	48	33	18	8	10	10	10	5	*162*
DK	2	6	38	3	2	0	0	0	1	0	*52*
EE	0	0	9	0	0	0	0	0	0	0	*9*
ES	8	2	43	16	7	1	9	16	8	3	*113*
FI	3	6	50	8	3	0	9	6	4	0	*89*
FR	24	6	61	37	39	10	9	28	17	4	*235*
GB	13	3	80	44	30	19	9	17	13	7	*235*
GR	0	0	12	8	1	1	9	6	3	0	*40*
HR	1	4	4	0	0	0	0	0	0	0	*9*
HU	1	2	12	1	4	0	0	0	2	0	*22*
IE	3	0	49	6	6	3	9	7	6	0	*89*
IT	2	1	33	17	4	4	9	6	7	0	*83*
LT	0	0	10	0	0	0	0	0	0	0	*10*
LU	1	0	13	8	2	0	9	6	7	0	*46*
LV	0	0	9	0	0	0	0	0	0	0	*9*
MT	0	0	8	7	1	0	9	6	3	0	*34*
NL	2	4	50	4	2	1	0	0	4	0	*67*
PL	8	2	27	5	0	0	0	0	4	0	*46*
PT	2	0	10	9	3	0	9	6	5	0	*44*
RO	2	1	5	1	2	0	0	0	0	0	*11*
SE	2	6	40	0	2	0	0	0	1	0	*51*
SI	2	2	12	7	2	1	9	6	3	0	*44*
SK	2	4	7	1	2	0	0	1	0	0	*17*
AL	~	~	~	~	~	~	~	~	~	~	*~*
AM	0	0	1	0	0	0	0	0	0	0	*1*
BA	0	1	3	0	0	0	0	0	0	0	*4*
CH	6	0	40	1	6	2	1	0	7	0	*63*
IS	1	0	0	0	0	0	0	0	0	0	*1*
LI	1	0	2	0	2	0	1	0	3	0	*9*
ME	1	1	0	0	0	0	0	0	0	0	*2*
MK	1	1	0	0	0	0	0	0	0	0	*2*
NO	1	7	37	0	2	0	0	0	1	0	*48*
RS	0	2	0	0	0	0	0	0	0	0	*2*
RU	8	4	23	1	2	0	0	0	0	0	*38*
TR	4	0	4	0	0	0	0	0	0	0	*8*

❶ VoD services providing various categories of works: films, fictions, documentaries, chidren programmes, …
❷ VoD services providing films and TV fictions.
❸ VoD services providing only films.
❹ VoD services providing only TV fiction works.
❺ VoD services providing only works for children and/or animation.
❻ VoD services providing archives of sport events, training programmes, etc. at the exclusion of live events.

➥ European Audiovisual Observatory / MAVISE database

T.6.3

Other kind of on-demand audiovisual services in Europe
December 2013

The various categories of services included in this table are, in most of the cases, not-geolocalised and therefore accessible worldwide.

In order to have meaningful figures we consider only the services with some relevance for the considered country (mainly based on the language).

Country	❶ Branded channels by broadcasters	❷ Catch-Up TV services	❸ News	❹ Portals	❺ Archives	Sport events	❻ Films trailers	Various	Total
AT	44	76	16	1	3	9	2	23	***174***
BE (CFB)	6	30	7	1	3	1	5	4	***57***
BE (DSG)	0	9	2	0	2	2	2	2	***19***
BE (VLG)	6	32	5	1	2	1	3	7	***57***
BG	1	15	0	0	0	0	0	1	***17***
CY	3	5	1	0	0	1	1	2	***13***
CZ	5	39	8	2	1	6	1	10	***72***
DE	44	124	7	2	4	3	12	14	***210***
DK	6	44	3	1	2	1	1	0	***58***
EE	3	20	0	1	2	1	0	0	***27***
ES	42	36	3	1	3	3	5	16	***109***
FI	4	27	1	1	3	2	2	2	***42***
FR	94	128	7	1	4	7	14	26	***281***
GB	179	69	12	1	6	18	5	28	***318***
GR	14	19	2	1	2	0	2	2	***42***
HR	7	6	0	0	0	0	0	0	***13***
HU	15	78	3	0	3	0	0	3	***102***
IE	16	28	1	0	2	2	2	8	***59***
IT	68	44	10	5	4	2	6	14	***153***
LT	8	12	0	1	2	1	0	0	***24***
LU	4	8	4	0	2	2	4	3	***27***
LV	5	29	0	1	2	1	0	0	***38***
MT	2	4	1	0	0	0	1	2	***10***
NL	52	32	1	1	4	2	1	1	***94***
PO	38	58	1	1	6	1	1	5	***111***
PT	9	25	1	1	2	0	1	2	***41***
RO	18	30	0	0	2	1	0	0	***51***
SE	7	95	4	0	3	5	1	2	***117***
SI	3	9	1	0	2	0	1	2	***18***
SK	3	38	2	4	2	1	0	3	***53***
AL	0	1	0	0	0	0	0	0	***1***
AM	0	0	0	0	0	0	0	0	***0***
BA	0	2	0	0	0	0	0	0	***2***
CH	47	26	2	1	3	3	4	2	***88***
IS	0	1	0	0	0	0	0	0	***1***
LI	41	8	1	0	1	1	0	0	***52***
ME	0	0	0	0	0	0	0	0	***0***
MK	0	3	0	0	0	0	0	0	***3***
NO	7	80	0	1	1	1	0	0	***90***
RS	0	2	0	0	0	0	0	0	***2***
RU	3	35	3	6	1	1	0	2	***51***
TR	3	4	0	1	0	0	0	0	***8***

➥ European Audiovisual Observatory / MAVISE database

❶ Branded channels on open platforms such as YouTube, Dailymotion, Snack TV.
❷ Catch-up TV services online or part of the offer of TV distribution platforms. The coverage of catch-up TV services provided by local television is not comprehensive and may differ from country to country.
❸ Includes video webpages of newspapers, news TV channels.
❹ Video webpages of portals such as MSN, Yahoo, portals from ISPs, …
❺ Film or TV archives.
❻ Includes only services agregating trailers and not branded pages by film producers, distributors or exhibitors.

T.6.4 G.6.1 Number of legal VoD services available by country in Europe and by country of establishment

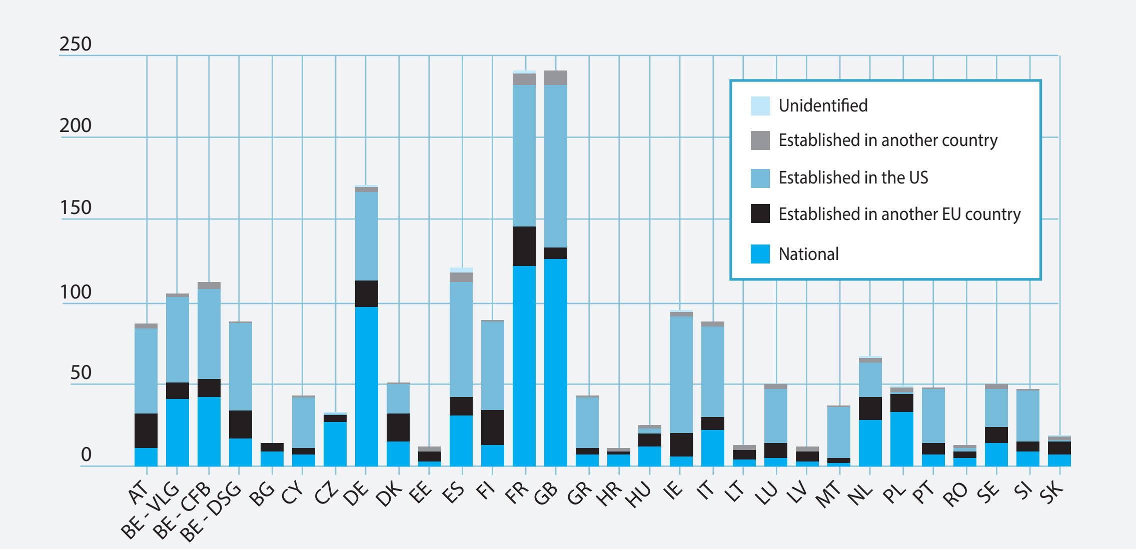
December 2013 All genres except Adult.

Country	National	Established in another EU country	❶ Established in the US	Established in another country	Unidentified	*Total of available VoD services*
AT	11	21	52	3		***87***
BE (CFB) ❷	42	11	55	4		***112***
BE (DSG) ❷	17	17	53	1		***88***
BE (VLG) ❷	41	10	52	2		***105***
BG	9	5				***14***
CY	7	4	31	1		***43***
CZ	27	4	1		1	***33***
DE	97	16	54	3	1	***171***
DK	15	17	18	1		***51***
EE	3	6	0	3		***12***
ES	31	11	70	6	3	***121***
FI	13	21	54	1		***89***
FR	122	24	86	7	2	***241***
GB	126	7	99	9		***241***
GR	7	4	31	1		***43***
HR	7	2	0	2		***11***
HU	12	8	3	2		***25***
IE	6	14	71	3	1	***95***
IT	22	8	55	3	0	***88***
LT	4	6		3		***13***
LU	5	9	33	3		***50***
LV	3	6		3		***12***
MT	2	3	31	1		***37***
NL	28	14	21	3	1	***67***
PL	33	11	1	3	1	***49***
PT	7	7	33	1		***48***
RO	5	4	2	2		***13***
SE	14	10	23	3		***50***
SI	9	6	31	1		***47***
SK	7	8	1	2	1	***19***

❶ The localisation of film VoD services (being branded catalogues of major studios) accessible through distribution platforms such as Xbox Live, iTunes Stores, YouTube is not available. In most of the cases, we have taken as our hypothesis that the branded services of US major studios were operated directly from the US. Studios and MPAA have declined to provide more information on this localisation issue.

❷ VoD services for Belgium (Flemish, French and German) can be counted twice or three times due to availability in whole Belgium.

➥ European Audiovisual Observatory, MAVISE database



December 2013 In units.

T.6.5

Ownership of available VoD services in the EU by country and by origin of parent (controlling) company

December 2013 In units.

Country	National	EU	US	Other country	Unidentified	*Total*
AT	6	18	60	3		***87***
BE (CFB)	27	21	59	5		***112***
BE (DSG)	13	15	58	2		***88***
BE (VLG)	25	21	56	3		***105***
BG	6	4	3	1		***14***
CY	6	2	33	2		***43***
CZ	19	7	4	2	1	***33***
DE	48	28	90	4	1	***171***
DK	12	9	27	3		***51***
EE	3	2	1	6		***12***
ES	20	11	80	7	3	***121***
FI	4	14	69	2		***89***
FR	87	22	120	9	3	***241***
GB	42	7	176	14	2	***241***
GR	5	4	32	2		***43***
HR	5	2	1	3		***11***
HU	5	7	10	3		***25***
IE	4	8	77	5	1	***95***
IT	19	4	61	3	1	***88***
LT	4	2	1	6		***13***
LU	4	6	36	4		***50***
LV	2	3	1	6		***12***
MT	0	3	32	2		***37***
NL	17	14	31	4	1	***67***
PL	18	14	9	5	3	***49***
PT	6	5	35	2		***48***
RO	2	3	5	3		***13***
SE	11	3	31	5		***50***
SI	6	5	34	2		***47***
SK	3	7	4	4	1	***19***

➡ European Audiovisual Observatory, MAVISE database

1 2 3 4 5 6 7 8

T.6.6 Consumer spend on digital video 2009-2013

EUR million.

The purchase or rental of movies and TV series delivered over the open Internet through transactional models (also known as EST, DTO, Internet VoD) or on subscription basis.

Country	2009	2010	2011	2012	2013	2013/12
BE	0.4	0.3	1.2	9.8	21.4	118.0%
CH	0.1	4.0	22.5	23.2	35.1	51.0%
DE	28.9	51.2	71.2	126.1	208.9	65.7%
DK	0.8	1.2	2.8	10.9	42.0	285.4%
ES	0.9	2.1	6.3	14.1	27.0	91.9%
FI	0.3	0.5	0.9	2.3	13.9	508.1%
FR	10.7	19.5	47.6	78.6	106.4	35.3%
GB	50.9	104.7	124.4	278.9	452.5	62.5%
HU	0.05	0.06	0.16	3.07	5.68	84.9%
IE	0.5	2.9	5.6	12.1	19.2	58.9%
IT	0.7	1.4	9.5	20.0	19.9	-0.4%
NL	1.8	2.5	4.1	9.0	15.3	70.9%
NO	8.0	10.9	18.1	34.6	66.6	92.4%
PL	0.09	0.12	0.55	4.22	8.69	106.3%
PT	0.008	0.01	0.449	3.86	6.19	60.3%
SE	2.1	3.3	8.0	18.8	62.5	231.4%
Total	106.2	204.7	323.4	649.6	1 111.3	71.1%

IVF/IHS - IVF Yearbook 2014 - Country profiles

T.6.7 Consumer spend on TV VoD 2009-2013

EUR million.

The delivery of movies and TV content on a transactional (VoD, NVoD/PPV) basis via cable/satellite/IPTV services.

Country	2009	2010	2011	2012	2013	2013/12
BE	17.8	26.9	35.0	44.7	53.9	20.6%
CH	4.8	7.2	12.3	17.6	23.7	34.9%
DE	30.2	37.4	47.6	66.7	88.5	32.7%
DK	2.2	6.7	9.6	11.3	12.7	12.0%
ES	31.1	27.2	27.2	20.6	17.1	-17.0%
FI	0.1	0.4	1.4	2.2	2.9	33.8%
FR	19.5	47.7	78.8	107.0	127.2	18.8%
GB	130.3	125.8	130.8	163.4	181.9	11.3%
HU	0.3	0.8	1.3	2.2	3.0	31.6%
IE	5.5	5.5	5.7	6.3	7.9	25.4%
IT	69.4	62.1	58.6	54.8	49.3	-10.0%
NL	11.1	16.0	24.0	44.2	56.8	28.6%
NO	3.9	5.1	6.9	10.5	13.0	24.5%
PL	6.1	15.2	22.3	28.6	35.1	22.4%
PT	13.4	17.2	20.0	24.6	27.9	13.4%
SE	8.7	11.2	15.6	20.7	22.8	9.8%
Total	354.4	412.4	497.1	625.4	723.7	15.7%

IVF/IHS - IVF Yearbook 2014 - Country profiles

1 2 3 4 5 6 7 8

T.6.8 Consumer spend for physical video and VoD in Europe

2009-2013 EUR billion.

Total market figures include revenues from legacy formats not broken out separately (e.g. VHS, HD-DVD, UMD) where relevant.

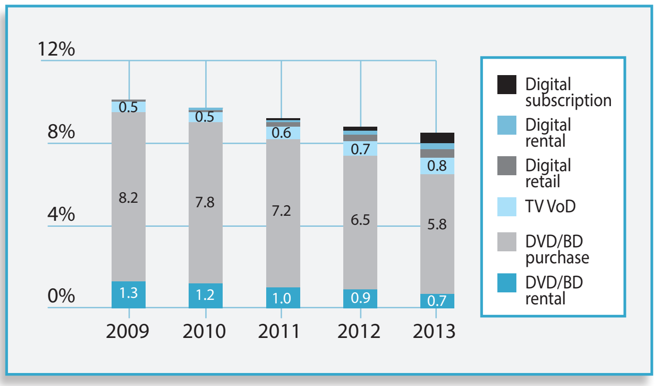
	2009	2010	2011	2012	2013
DVD/BD rental	1.3	1.2	1.0	0.9	0.7
DVD/BD purchase	8.2	7.8	7.2	6.5	5.8
TV VOD [1]	0.5	0.5	0.6	0.7	0.8
Digital retail [2]	0.1	0.1	0.2	0.3	0.4
Digital rental [3]	0.0	0.1	0.1	0.2	0.3
Digital subscription [4]	0.0	0.0	0.1	0.2	0.5

1. VoD operated by pay-TV platforms.
2. Online VoD, "download to own".
3. Online VoD rental.
4. Online SVoD.

➥ IHS/IVF

G.6.2 Consumer spend for physical video and VoD in Europe

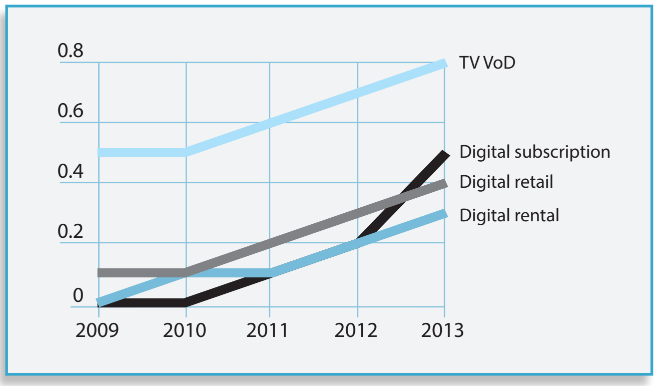
2009-2013 EUR billion.



➥ IHS/IVF

G.6.3 Consumer spend for VoD in Europe

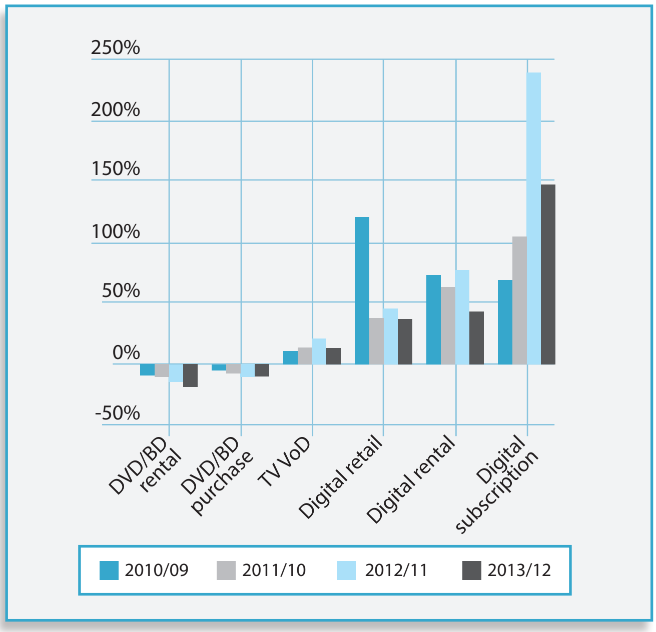
2009-2013 EUR billion.



➥ IHS/IVF

G.6.4 Yearly rate of growth of consumer spend for physical video and VoD in Europe

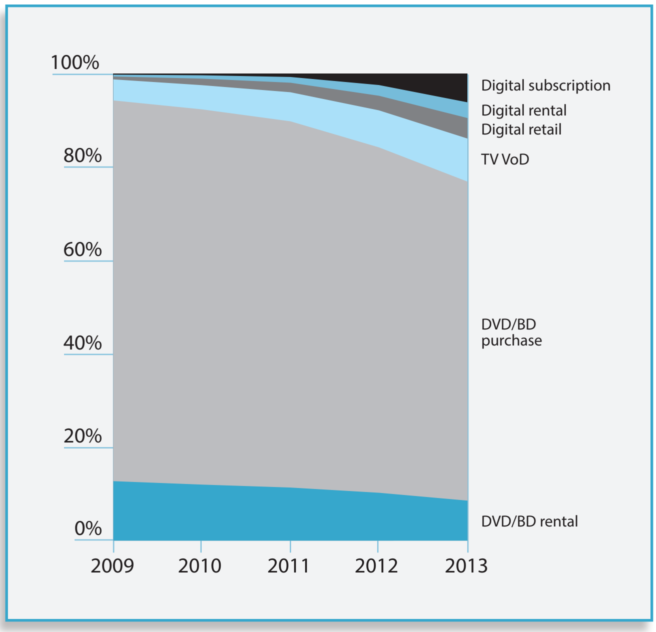
2009-2013 EUR billion.



➥ IHS/IVF

G.6.5 Breakdown of consumer spend for physical video and VoD in Europe

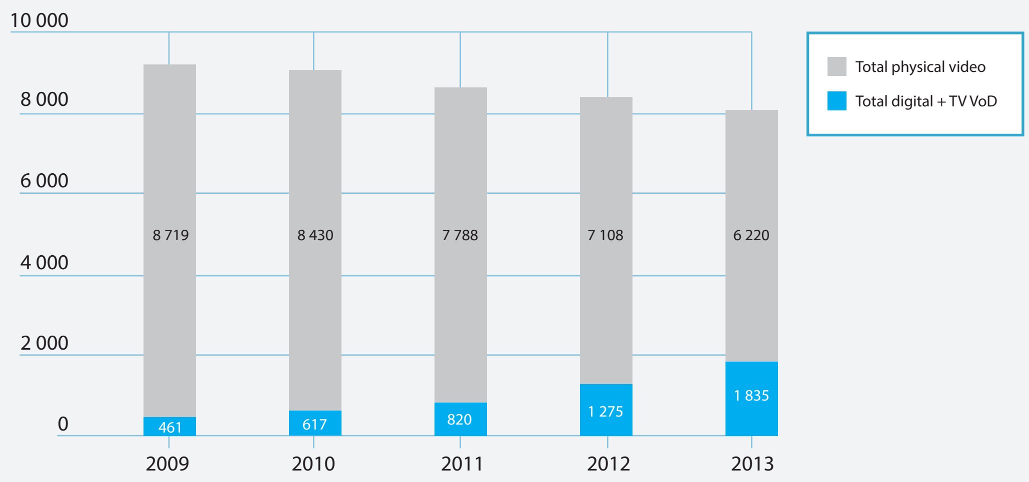
2009-2013 EUR billion.



➥ IHS/IVF

G.6.6 Evolution of total digital & TV VoD and of physical video

2009-2013 EUR million.

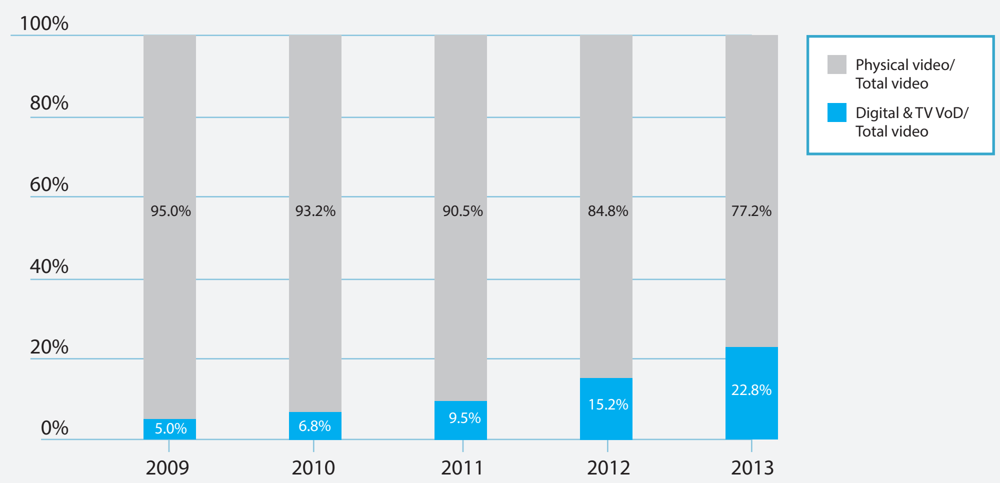


2009-2013 EUR million.

IVF/IHS - IVF Yearbook 2014

G.6.7 Evolution of the share of digital & TV VoD and of physical video compared to total video consumer spending

2009-2013 In %.



2009-2013 In %.

IVF/IHS - IVF Yearbook 2014

T.6.9
G.6.8

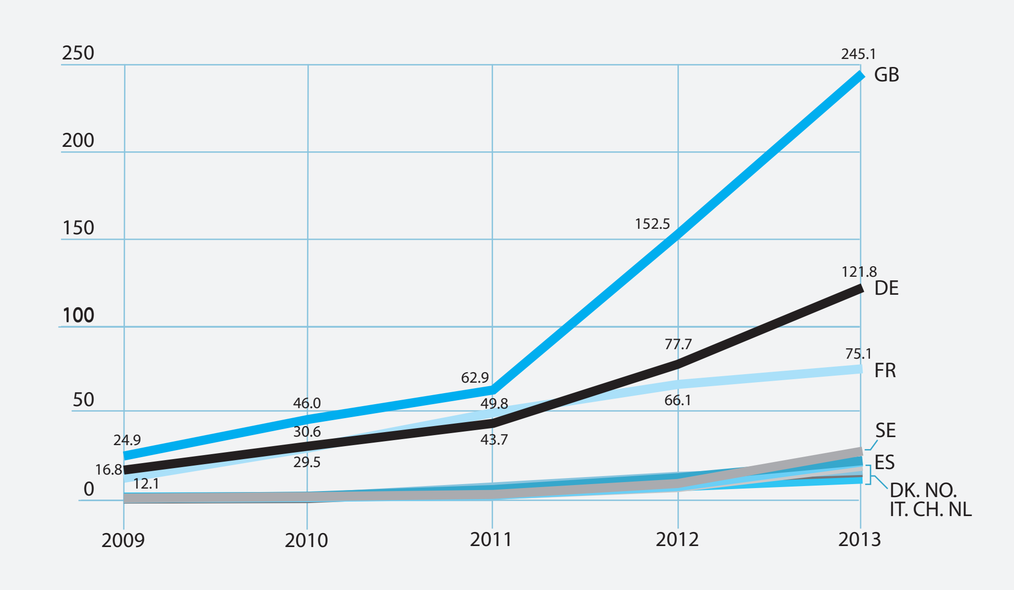
Online VoD film consumer spend [1]

2009-2013 EUR million. Includes sales tax.

Country	2009	2010	2011	2012	2013	2013/12
AT	0.1	0.3	2.0	4.4	5.9	***34.7%***
BE	0.3	0.3	1.1	4.6	7.1	***54.3%***
CH	0.1	0.4	4.9	11.4	15.4	***35.2%***
CZ	0.1	0.2	0.7	2.4	4.2	***77.4%***
DE	16.8	30.6	43.7	77.7	121.8	***56.8%***
DK	0.6	1.0	2.3	7.3	21.5	***193.6%***
ES	0.8	1.8	5.6	12.4	22.2	***78.5%***
FI	0.3	0.4	0.8	1.7	6.7	***296.7%***
FR	12.1	29.5	49.8	66.1	75.1	***13.6%***
GB	24.9	46.0	62.9	152.5	245.1	***60.7%***
GR	0.0	0.0	0.0	0.8	1.5	***80.3%***
HU	0.0	0.1	0.1	0.8	1.7	***99.7%***
IE	0.2	1.9	3.2	6.3	9.7	***53.7%***
IT	0.5	1.3	7.1	13.2	16.6	***26.3%***
NL	1.3	1.6	2.9	7.2	11.6	***61.4%***
NO	0.6	1.1	2.4	6.7	19.0	***182.9%***
PL	0.1	0.1	0.5	3.9	7.0	***80.6%***
PT	0.0	0.0	0.3	1.7	2.6	***57.2%***
SE	0.7	1.5	2.8	9.1	27.7	***203.5%***
EUR 28 [1]	**58.9**	**116.6**	**185.9**	**372.1**	**588.0**	***58.0%***
Western Europe	**59.7**	**118.0**	**193.2**	**390.2**	**622.4**	***59.5%***

[1] Not including BG, CY, EE, LT, LU, LV, MT, RO, SI, SK.

➥ IHS



2009-2013 EUR million.

T.6.10
G.6.9

Online TV consumer spend

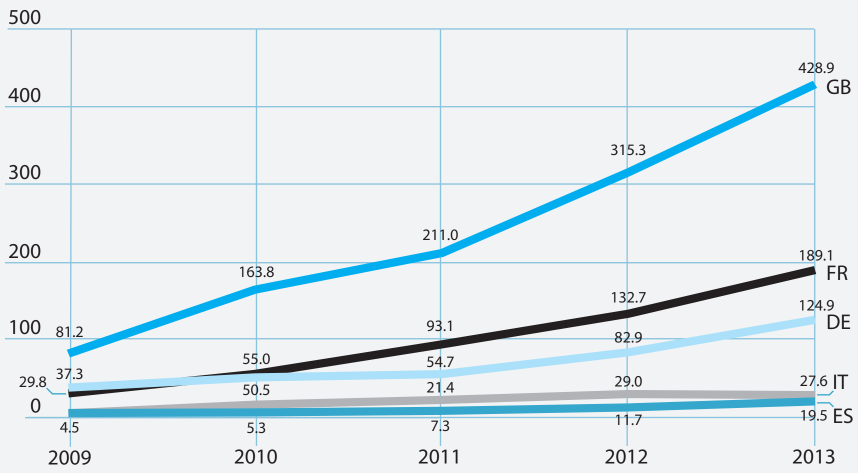
2009-2013 EUR million.

Country	2009	2010	2011	2012	2013	*2013/12*
DE	37.3	50.5	54.7	82.9	124.9	***50.7%***
ES	4.5	5.3	7.3	11.7	19.5	***66.9%***
FR	29.8	55.0	93.1	132.7	189.1	***42.5%***
GB	81.2	163.8	211.0	315.3	428.9	***36.0%***
IT	4.2	15.3	21.4	29.0	27.6	***-4.7%***
Western Europe	**189.2**	**345.5**	**462.1**	**672.8**	**938.2**	***39.4%***

Notes:

➥ IHS

1. Pay per view includes all content consumed on an on-demand basis, including traditional PPV (as per live sports) and VoD.
2. Total transactional revenue is the sum of digital retail revenue and digital rental revenue.
3. Free to view revenues are generated from display and in-stream ads which the users see when they view a video.
4. Historical free to view streaming figures are based on IHS analysis of comScore data.



2009-2013 EUR million.

T.6.11 Entertainment retailers, DVD rental and VoD companies in Europe

2011-2013 Operating revenues in EUR million.

Leading entertainment retailers (1)	Country	Stores	Online rental	Online sales	Online music	VoD	2011	2012	2013	*2013/12*
Media Saturn (cons.)	**DE**	•		•	•	•	21 000.0	21 000.0	21 100.0	***0.5%***
Amazon EU	**LU**			•		•	9 854.7	13 076.0	15 450.0	***18.2%***
FNAC (cons.) (2)	**FR**	•		•	•		4 162.5	4 061.1	3 905.0	***-3.8%***
Smiths News Trading Ltd (WHSmith)	**GB**	•		•			1 804.0	1 972.7	1 790.1	***-9.3%***
Amazon.co.UK Ltd	**GB**			•			248.2	382.9	536.3	***40.1%***
HMV Retail (3)	**GB**	•		•	•		–	–	371.7	***–***
p.m. HMV Group (3)	**GB**	•		•	•	•	1 074.1	~	–	***–***
Bol.com B.V.	**NL**			•			355.2	~	~	***~***
Librerie Feltrinelli (cons.)	**IT**	•		•			346.2	~	316.0	***~***
Empik SP Z.O.O.	**PL**	•		•			248.1	281.5	~	***~***
CDON AB	**SE**			•	•	•	201.5	250.5	204.7	***-18.3%***
Domo Retail S.A.	**RO**	•		•			162.5	125.1	131.7	***5.3%***
Xtra-Vision	**IE**	•		•			~			
France Loisirs (4)	**FR**	•		•			~	~		
Ex Libris	**CH**	•		•	•		140			
E-Shop Gr. S.A.	**GR**			•			~			
Blockbuster Italia S.p.A.	**IT**	•		•			~	~		
Circulo de Lesctores S.A.	**ES**			•		•	92	~		
Multichannel Solutions for Entertainment	**GB**			•			80	~		
Platetkompaniet AS	**NO**	•		•	•		79	~		
ECI Holding B.V.	**NL**	•		•						

Online video rental, online music and VoD companies	Country	Portails video	Online rental	Games online	Online Music	VoD	2011	2012	2013	*2013/12*
Sony Computer Entertainment	**GB**			•		•	2 761.1	2 356.0	~	***~***
iTunes S.à.r.l.	**LU**			•	•	•	1 038.1	1 534.4	2 052.3	***33.8%***
Microsoft Luxembourg	**LU**	•		•	•	•	337.0	386.9	~	***~***
Spotify AB	**SE**				•		124.4	349.1	~	***~***
Netflix s.à.r.l. (est.)	**LU**						–	125.9	294.8	***134.2%***
Yahoo Nederland	**NL**	•					111.3	158.2	~	***~***
Amazon Instant Video (4)	**GB**		•			•	143.6	148.7	143.5	***-3.5%***
M6 Web	**FR**	•				•	112.1	109.2	102.5	***-6.1%***
Digital Virgo Entertainment	**FR**						27.7	84.8	106.4	***25.5%***
E-TF1	**FR**						74.2	86.5	88.6	***2.4%***
SwissTV	**CH**					•	64.9	~	~	***~***
Yahoo France	**FR**	•					66.5	50.8	58.3	***14.8%***
Lovefilm Deutschland	**DE**					•	22.8	37.3	46.4	***24.4%***
Yahoo UK Services	**GB**	•					49.2	44.2	46.0	***4.1%***
Viaplay AB	**SE**					•	~	31.7	42.4	***33.8%***
Yahoo! UK Ltd	**GB**	•					23.9	27.3	33.0	***20.9%***
Auféminin.com	**FR**	•					25.2	25.6	26.3	***2.7%***
SF Anytime	**SE**					•	13.9	20.3	20.5	***1.0%***
Yahoo Iberia	**ES**	•					18.9	20.1	~	***~***
Myvideo Broadband SRL	**RO**	•					9.9	13.5	17.1	***26.7%***
FilmoTV	**FR**					•	5.4	14.1	~	***~***
Yahoo! Deutschland	**DE**	•					13.7	12.7	~	***~***
Vevo	**GB**					•	1.2	7.1	11.5	***62.0%***
Direct One	**RO**					•	8.3	10.5	9.8	***-6.7%***
IVI.RU	**RU**						~	5.9	10.4	***76.3%***

➡ European Audiovisual Observatory

(1) Videogames only, retailers not included.
(2) For 2010-2012: turnover instead of operating revenues.
(3) HMV Group was out of administration in April 2013 after purchase by Hilco. Operating revenue 2013 of HMV Retail Ltd. over 9 months.
(4) Formerly LOVEFiLM. Fully taken over by Amazon in January 2011.

Not available: Blogmusik SAS (Deezer) (BE), Dailymotion (FR, GB,..); revenues of Google Play in Europe (part of Google inc.,…) and of YouTube in Europe (US).

1
2
3
4
5
6
7
8

Analysing the composition of VoD catalogues

With the development of VoD services, the availability of data on the composition of VoD catalogues (by genre, age and origin of programmes) is becoming a challenge for audiovisual market observers and analysts. There are no ideal methodologies for analysing, in a harmonised manner, the content and the origins of the catalogues of VoD services at the European level.

Monitoring by national regulatory authorities

In the context of the implementation of Article 13(2) of the AVMS Directive, the member states (generally through their national regulatory authority) have to report to the Commission and therefore to undertake some monitoring of how service providers under their jurisdiction contribute to the promotion of European works.

As stated by the Commission, *"the first report on the application of Article 13 did not provide sufficient data to draw any conclusions on the promotion of European works by on-demand service providers."* The data were collected at a moment when most of the member states had not yet implemented the Directive and had not yet undertaken an in-depth analysis of the services under their jurisdiction. In order to provide support for the NRAs and illustrate best practices, the Commission published in July 2014 the document *Promotion of European works in practice.*

According to the document: *"Several Member States have implemented Article 13 AVMSD by imposing on VOD providers the obligation to reserve a share of European works in their catalogue. This is required either as a standalone obligation (e.g. Cyprus, Hungary, Lithuania, Malta, and Slovakia) or in combination with other joint or alternative obligations (e.g. France, Croatia, Czech Republic, Italy, Poland, Romania, Slovenia, Spain). The required shares in the catalogues vary considerably between Member States (10-60%). Some Member States have also opted for a gradual raise of the share, at least during a transitory period (e.g. Malta, Croatia, France, Italy)."*

The document does not provide a systematic analysis of how the implementation of the provisions on shares of European works in catalogues are monitored. *"The input of regulatory authorities to the questionnaire and the replies to the Green Paper indicate that monitoring obligations pose an important burden on operators, but also on Regulatory Authorities. This is particularly the case for shares in the catalogue. Lack of data seems to be a general concern and challenge in this area. It was claimed that more information would allow checking the efficiency of the measures.*

Analyse de la composition des catalogues de VoD

Avec le développement des services de VoD, disposer de données sur la composition des catalogues de VoD (par genre, âge et origine des programmes) devient un défi pour les observateurs et les analystes du marché de l'audiovisuel. Il n'existe pas de méthodologie idéale pour analyser, de manière harmonisée, le contenu et les origines des catalogues des services de VoD au niveau européen.

Le suivi par les autorités de régulation nationales

Dans le cadre de la mise en œuvre du § 2 de l'article 13 de la Directive SMAV, les États membres (en général par l'intermédiaire de leur autorité de régulation nationale) sont tenus de présenter des rapports à la Commission et, par conséquent, de procéder à un certain suivi de la façon dont les fournisseurs de services relevant de leur compétence contribuent à la promotion des œuvres européennes.

Comme indiqué par la Commission, *« les données du premier rapport sur l'application de l'article 13 sont insuffisantes pour permettre de tirer des conclusions en matière de promotion des œuvres européennes par les fournisseurs de services à la demande »*. Les données ont été recueillies alors que la plupart des États membres n'avaient pas encore mis en œuvre la directive et n'avaient pas encore entrepris une analyse approfondie des services relevant de leur compétence. Afin d'apporter son soutien aux agences de régulation nationales et de mettre en avant les meilleures pratiques, la Commission a publié en juillet 2014, le document intitulé *Promotion of European works in practice* (La promotion des œuvres européennes dans la pratique).

Selon ce document : *« Plusieurs Etats membres ont mis en œuvre l'article 13 de la Directive SMAV en imposant aux fournisseurs de VoD l'obligation de réserver une certaine proportion de leur catalogue aux œuvres européennes. Il peut s'agir d'une obligation indépendante (par exemple, Chypre, Hongrie, Lituanie, Malte et Slovaquie) ou d'une exigence associée à d'autres obligations conjointes ou alternatives (par exemple, France, Croatie, République tchèque, Italie, Pologne, Roumanie, Slovénie, Espagne). La proportion requise varie considérablement selon les Etats membres (de 10 à 60 %). Certains Etats membres ont également opté pour une augmentation progressive de cette proportion, au moins pendant une période transitoire (par exemple, Malte, Croatie, France, Italie) »*.

Le document ne comprend pas d'analyse systématique de la façon dont la mise en œuvre des dispositions relatives à la proportion des catalogues réservée aux œuvres européennes est surveillée. *« Les informations communiquées par les autorités de régulation dans le questionnaire et*

Analyse der Zusammensetzung Von Vod-Katalogen

Die Zahl der VoD-Anbieter wächst kontinuierlich, und für die Beobachter und Analysten des audiovisuellen Marktes wird es zunehmend zu einem Problem, Daten über die Zusammensetzung von VoD-Katalogen (nach Genre, Alter und Herkunft der Programme) zur Förderung europäischer Werke zur Verfügung zu haben. Eine ideale Methode für die Analyse von Inhalt und Herkunft des Angebots von VoD-Diensten auf europäischer Ebene gibt es nicht.

Überwachung durch nationale Regulierungsbehörden

Im Rahmen der Umsetzung von Artikel 13 Absatz 2 der Richtlinie über audiovisuelle Mediendienste (AVMD-Richtlinie) müssen die Mitgliedstaaten (im Allgemeinen über ihre nationale Regulierungsbehörde) der Kommission über die Durchführung berichten und zumindest in gewissem Maße überwachen, inwieweit die Anbieter dieser Dienste, die unter ihre Rechtshoheit fallen, zur Förderung europäischer Werke beitragen.

Wie die Kommission festgestellt hat, *„liegen diesem ersten Bericht nicht genügend Daten zugrunde, um Schlussfolgerungen über die Förderung europäischer Werke durch Abrufdiensteanbieter (Artikel 13) ziehen zu können."* Die Daten wurden zu einem Zeitpunkt erhoben, als die meisten Mitgliedstaaten die Richtlinie noch nicht umgesetzt und noch keine eingehende Analyse der Dienste vorgenommen hatten, die ihrer Rechtshoheit unterstehen. Um die nationalen Regulierungsbehörden zu unterstützen und die bewährtesten Praktiken zu verdeutlichen, hat die Europäische Kommission im Juli 2014 das Dokument *Promotion of European works in practice* veröffentlicht.

Dem Dokument zufolge haben „mehrere Mitgliedstaaten Artikel 13 der AVMD-Richtlinie umgesetzt, indem sie die VoD-Anbieter verpflichtet haben, einen bestimmten Anteil ihres Katalogs für europäische Werke zu reservieren. Dies erfolgt entweder in Form einer unabhängigen Verpflichtung (z.B. Zypern, Ungarn, Litauen, Malta und die Slowakei) oder in Kombination mit anderen Verpflichtungen oder Alternativen (z.B. Frankreich, Kroatien, die Tschechische Republik, Italien, Polen, Rumänien, Slowenien, Spanien). Die Anteile, die für die Kataloge festgelegt werden, unterscheiden sich erheblich zwischen den einzelnen Mitgliedstaaten (10-60 %). Einige Mitgliedstaaten haben sich auch für eine schrittweise Anhebung der Anteile entschieden, zumindest während eines Übergangszeitraums (z.B. Malta, Kroatien, Frankreich, Italien)."

Das Dokument enthält keine systematische Analyse der Art und Weise, wie die Bestimmungen im Hinblick auf die Anteile europäischer Werke in den Katalogen überwacht werden. *„Die Beiträge*

Most Member States rely on data supplied by the on-demand operators without further control/systematic cross-checking and/or random controls. The frequency of requesting such data also differs: many foresee yearly reporting obligations for the providers while others rely on longer reporting periods, e.g. coinciding with the reporting obligation laid down by the Directive i.e. all four years. Random checks are only carried out in few Member States.

Several countries indicated that they are discussing or planning to develop a specific software system for monitoring.

The monitoring system put in place by the French CSA consists of annual declarations by service providers. They have to describe the mechanism set up (e.g. by a software) to ensure that the catalogues contain the appropriate share of European works and of French-speaking works at any time. The compliance with the share in the catalogue obligation is also checked by the CSA regarding two randomly chosen days. Operators have to provide proof, such as screen shots and a list of works classified on a nationality basis available in the catalogue."

The NRA of the French Community of Belgium (Conseil Supérieur de l'Audiovisuel) has published reports on the proportion of European works in VoD catalogues and the existence of promotional measures regarding European works (such as promotion on homepages). [1] The CNC in France publishes data resulting from the comprehensive monitoring of VoD services by the private consultancies GfK and NPA Conseil.

Example of French monitoring

The VoD barometer first came into being as a way of monitoring the transactional VoD market. Each month, GfK identifies all the titles sold or rented by the most representative generalist services established on the pay VoD market in France (with the exclusion, therefore, of services established abroad, such as iTunes, Xbox Live, Google Play Movies, Viewster and, more recently, Netflix). [2]

In 2013, the number of active VoD titles (programmes downloaded at least once during the period) on the services of the panel rose significantly. According to the data, 57,178 titles were active – 3,001 programmes more than in 2012 (+5.5%). The majority of the range of VoD titles were audiovisual programmes, which made up 44.3% of the active titles in 2013 (compared to 50.9% in 2012), compared with 34.9% for adult programmes (29.3% in 2012) and 20.8% for cinema films (19.8% in 2012).

les réponses au Livre vert indiquent que les obligations de surveillance constituent un lourd fardeau pour les opérateurs, mais aussi pour les autorités de régulation. C'est particulièrement le cas pour la part réservée des catalogues. Le manque de données semble être une préoccupation et un défi pour tous dans ce domaine. Il a été allégué que disposer de davantage d'informations permettrait de vérifier l'efficacité des mesures.

La plupart des Etats membres s'appuient sur des données fournies par les opérateurs à la demande sans autre contrôle/contrôle croisé systématique et/ou contrôle aléatoire. La fréquence de demande de ces données diffère également : beaucoup prévoient des obligations de déclaration annuelle pour les fournisseurs tandis que d'autres fixent des périodes de déclaration plus longues, par exemple coïncidant avec l'obligation de déclaration prévue par la directive, c'est-à-dire tous les quatre ans. Des contrôles aléatoires ne sont effectués que dans quelques Etats membres.

Plusieurs pays ont indiqué travailler à ou discuter de l'élaboration d'un système logiciel spécifique pour le suivi.

Le système de suivi mis en place par le CSA français comprend des déclarations annuelles déposées par les fournisseurs de services. Ils doivent décrire le mécanisme utilisé (par exemple, un logiciel) afin de garantir que les catalogues contiennent, à tout moment, la proportion appropriée d'œuvres européennes et d'œuvres francophones. Le respect de l'obligation relative à la proportion de catalogue est également vérifié par le CSA pour deux jours choisis au hasard. Les opérateurs doivent présenter les preuves nécessaires, par exemple des captures d'écran et la liste des œuvres, classées en fonction de leur nationalité, disponibles dans leur catalogue ».

L'agence de régulation nationale de la Communauté française de Belgique (Conseil supérieur de l'audiovisuel) a publié des notes sur la proportion des œuvres européennes dans les catalogues de VoD et la mise en place de mesures promotionnelles pour les œuvres européennes (par exemple, promotion sur la page d'accueil). [1] Le CNC publie des données résultant d'un suivi exhaustif des services de VoD par des consultants privés, à savoir GfK et NPA Conseil.

L'exemple du suivi français

Le baromètre VoD a été créé afin de surveiller le marché transactionnel de la VoD. Chaque mois, GfK identifie tous les titres vendus ou loués par les services généralistes les plus représentatifs établis sur le marché de la VoD payante en France (à l'exclusion, donc, des services

von Regulierungsbehörden zu dem Fragebogen und die Antworten auf das Grünbuch lassen erkennen, dass die Überwachungspflichten für die Betreiber, aber auch für die Regulierungsbehörden eine hohe Belastung darstellen. Dies ist vor allem der Fall bei der Feststellung der Anteile in dem Katalog. Das Fehlen von Daten scheint ein generelles Problem in diesem Bereich zu sein. Mehr Informationen, so wurde gefordert, würden es ermöglichen, die Effizienz der Maßnahmen besser zu überprüfen.

Die meisten Mitgliedstaaten sind auf die Daten angewiesen, die von den On-Demand-Anbietern zur Verfügung gestellt werden, und verzichten auf zusätzliche systematische Kontrollen oder einen Datenabgleich und/oder Zufallskontrollen. Auch die Häufigkeit, in der solche Daten angefordert werden, ist unterschiedlich: Viele Mitgliedstaaten sehen einen jährlichen Bericht für die Anbieter vor, andere dagegen haben längere Berichtszeiträume festgelegt, die z.B. mit der Berichtspflicht übereinstimmt, die in der Richtlinie festgelegt ist, das heißt, alle vier Jahre. Zufallskontrollen werden nur in wenigen Mitgliedstaaten durchgeführt.

Nur wenige Länder haben angegeben, dass sie die Entwicklung einer besonderen Software für die Überwachung in Erwägung ziehen oder planen.

Das Überwachungssystem, das die französische Regulierungsbehörde CSA eingeführt hat, besteht aus jährlichen Erklärungen der VoD-Anbieter. Sie müssen den Mechanismus beschreiben, den sie eingeführt haben (z. B. eine Software), um sicherzustellen, dass die Kataloge stets den angemessenen Anteil an europäischen und französischsprachigen Werken enthalten. Die Einhaltung dieses Anteils wird von der CSA an zwei zufällig ausgewählten Tagen überprüft. Die Betreiber müssen den Nachweis erbringen, z. B. anhand von Screenshots und einer Liste von Werken, die im Katalog erhältlich sind und nach Herkunftsland klassifiziert sind."

Die nationale Regulierungsbehörde der französischen Gemeinschaft Belgiens (Conseil Supérieur de l'Audiovisuel) hat Berichte über den Anteil europäischer Werke in VoD-Katalogen und über Werbung für europäische Werke veröffentlicht (etwa Werbung auf der Homepage). [1] Das CNC (Centre National du Cinéma) in Frankreich veröffentlicht Daten, die aus der umfassenden Überwachung von VoD-Anbietern durch die privaten Marktforschungsunternehmen GfK und NPA Conseil stammen.

Beispiele für die Überwachung in Frankreich

Das VoD-Barometer, das die beiden Marktforschungsunternehmen eingeführt haben, sollte ursprünglich die Transaktionen auf dem VoD-Markt überwachen.

[1] Examples of reports can be found at : http://www.csa.be/system/documents_files/2180/original/CAC_20131205_avis_SiA_Alademande_2012.pdf?1386599673 and here.

[2] Here, we follow the overview provided in the CNC report for 2013, May 2014, p. 143

In the range of audiovisual programmes available (excluding cinema films and adult programmes), the genre with the most active titles is the TV series or TV drama (29.4% of active audiovisual programmes in 2013, compared to 29.0% in 2012) ahead of documentaries (28.1% in 2013, 27.5% in 2012), youth programmes (21.0% in 2013, 20.4% in 2012) and music (13.6% in 2013, 15.4% in 2012).

The range of films available as VoD continues to expand. In 2013, 11,870 films were downloaded at least once during the year on one of the main VoD platforms, an increase of 10.8% over 2012 (1,157 additional titles).

In the case of cinema films, the proportion of the various national origins is changing. American films made up 44.0% of the active titles (5,219 titles, a rise of 7.8%), ahead of French films (+5.5%). VoD constituted the majority of audiovisual programmes, representing 44.3% of active titles in 2013 (50.9% in 2012), compared with 34.9% for adult programmes (29.3% in 2012) and 20.8% for cinema films (19.8% in 2012).

Since 2014, the CNC has also provided data on the range of subscription VoD services (SVoD) available. [3] Data on SVoD offerings are collected each month by the institute NPA Consulting & Research via the internet sites of the services concerned. Eight platforms are measured: CanalPlay Infinity, Club Vidéo SFR Pass Kids, Club Vidéo SFR Pass Cinéma, Dailymotion Kids+, Filmo TV, Jook Vidéo, Pass M6 and VidéoFutur Pass Duo. This data collection is carried out over one week in the month analysed.

In December 2013, the number of programmes available as SVoD rose to 3,557. Films (cinema films and films directly released on video) made up the bulk of the offering. In December 2013, 69.7% of the programmes available as SVoD were films, 4.6% were TV series and 6.0% were youth series. Hence, 1,634 cinema films were available at that time as SVoD. French films made up 43.2% of the offering, American films 35.7%, European films 15.1% and films of other origin 5.9%. 1,389 of the cinematographic works available as SVoD were accessible on a single platform (85.0%), 217 on two platforms (13.3%), 27 on three (1.7%) and one on four (0.001%). No work was accessible on more than 4 platforms.

Rovi data on European works in catalogues of VoD services

One other comprehensive analysis of catalogues was undertaken in October 2014 for the first time by Rovi at the request of the European Audiovisual Observatory.

établis à l'étranger, tels que iTunes, Xbox Live, Google Play Films, Viewster et, plus récemment, Netflix). [2]

En 2013, le nombre de titres VoD actifs (programmes téléchargés au moins une fois au cours de la période) sur les services du panel a considérablement augmenté. Selon les données recueillies, 57 178 titres sont actifs – 3001 programmes de plus qu'en 2012 (+5,5 %). La majorité des titres de VoD sont des programmes audiovisuels, qui représentent 44,3 % des titres actifs en 2013 (contre 50,9 % en 2012), contre 34,9 % pour les programmes pour adultes (29,3 % en 2012) et 20,8 % pour les films cinématographiques (19,8 % en 2012).

Dans la gamme des programmes audiovisuels disponibles (hors films cinématographiques et programmes pour adultes), le genre comprenant le plus de titres actifs est celui de la série TV ou du téléfilm (29,4 % des programmes audiovisuels actifs en 2013, contre 29 % en 2012) devant les documentaires (28,1 % en 2013, 27,5 % en 2012), les programmes pour la jeunesse (21 % en 2013, 20,4 % en 2012) et la musique (13,6 % en 2013, 15,4 % en 2012).

La gamme de films disponibles en VoD continue de s'étendre. En 2013, 11 870 films ont été téléchargés au moins une fois au cours de l'année sur l'une des principales plates-formes de VoD, soit une augmentation de 10,8 % par rapport à 2012 (1 157 titres supplémentaires).

Dans le cas des films cinématographiques, la proportion des diverses nationalités est en train de changer. Les films américains représentent 44 % des titres actifs (5 219 titres, en hausse de 7,8 %), devant les films français (+5,5 %). La VoD est constituée majoritairement de programmes audiovisuels, représentant 44,3 % des titres actifs en 2013 (50,9 % en 2012), contre 34,9 % pour les programmes pour adultes (29,3 % en 2012) et 20,8 % pour les films cinématographiques (19,8 % en 2012).

Depuis 2014, le CNC fournit également des données sur la gamme de services de VoD par abonnement (VoDA) disponibles. [3] Les offres de vidéo à la demande par abonnement sont collectées chaque mois par l'institut NPA Consulting & Research via les sites internet des services concernés. Huit plates-formes sont pigées : CanalPlay Infinity, Club Vidéo SFR Pass Kids, Club Vidéo SFR Pass Cinéma, Dailymotion Kids+, Filmo TV, Jook Vidéo, Pass M6 et VidéoFutur Pass Duo. Cette collecte est effectuée au cours d'une semaine du mois analysé.

En décembre 2013, le nombre de programmes disponibles en VoDA s'élève à 3 557. Les films (cinématographiques et

Jeden Monat stellt die GfK fest, welche Titel von den führenden Anbietern auf dem Pay-VoD-Markt in Frankreich verkauft oder ausgeliehen wurden (Anbieter, die im Ausland ihren Sitz haben, werden nicht berücksichtigt - iTunes, Xbox Live, Google Play Movies, Viewster und seit kurzem auch Netflix). [2]

2013 nahm die Zahl „aktiver" VoD-Titel (d. h., Programme, die während des Zeitraums mindestens einmal heruntergeladen wurden) im Angebot des Panels erheblich zu. Nach den vorliegenden Daten waren das 57.178 Titel – 3.001 mehr als 2012 (+5,5 %). Bei den meisten VoD-Titeln handelte es sich um audiovisuelle Programme, die 2013 44,3 % der aktiven Titel ausmachten (gegenüber 50,9 % 2012), 34,9 % waren Erwachsenenprogramme (29,3 % 2012) und 20,8 % Kinofilme (19,8 % 2012).

Bei den audiovisuellen Programmen (mit Ausnahme von Kinofilmen und Erwachsenenprogrammen) war das Genre mit den meisten Titeln Fernsehserien oder Fernsehfilme (29,4 % 2013 gegenüber 29 % 2012) gefolgt von Dokumentationen (28,1 % im Jahr 2013 gegenüber 27,5 % im Jahr 2012), Jugendprogrammen (21 % im Jahr 2013 gegenüber 20,4 % im Jahr 2012) und Musik (13,6 % 2013, 15,4 % 2012).

Die Zahl der Filme, die als VoD erhältlich sind, nimmt immer mehr zu. 2013 wurden 11.870 Filme mindestens einmal während des Jahres von einer der Haupt-VoD-Plattformen heruntergeladen. Das ist ein Anstieg von 10,8 % gegenüber 2012 (1.157 zusätzliche Titel).

Bei den Kinofilmen änderte sich der Anteil des Herkunftslands der Filme. Amerikanische Filme machten 44 % der aktiven Titel aus (5.219 Titel, ein Anstieg von 7,8 %), gefolgt von französischen Filmen (+5,5 %). VoD stellte den größten Teil der audiovisuellen Programme dar, 2013 waren dies 44,3 % der aktiven Titel (50,9 % im Jahr 2012), gegenüber 34,9 % für Erwachsenenprogramme (29,3 % 2012) und 20,8 % für Spielfilme (19,8 % 2012).

Seit 2014 liefert das CNC auch Daten über die Zahl der VoD-Abonnements (SVoD). [3] Die Daten über SVoD-Angebote werden monatlich von der NPA Consulting & Research erhoben, und zwar auf den Internetseiten der betreffenden Anbieter. Das Unternehmen analysiert die Angebote auf acht Plattformen: CanalPlay Infinity, Club Vidéo SFR Pass Kids, Club Vidéo SFR Pass Cinéma, Dailymotion Kids+, Filmo TV, Jook Vidéo, Pass M6 und VidéoFutur Pass Duo. Diese Datenerhebung wird während einer Woche in dem analysierten Monat durchgeführt.

Im Dezember 2013 stieg die Zahl der Programme, die als SVoD angeboten wurden, auf 3.557. Den mit Abstand größten Teil des Abonnement-Angebots

[3] See CNC, *Le marché de la vidéo*, mars 2014, http://www.cnc.fr/web/fr/dossier/-/ressources/4900932

Rovi is a company that specialises in providing metadata on audiovisual programmes. The primary activity is supplying data on TV schedules to the press and to providers of EPG services. To operate these services, Rovi has created a reference database containing metadata on films and TV programmes. Using this information, Rovi has been in a position, since 2006, to provide the European Audiovisual Observatory with a statistical analysis of the origin of fiction programmes broadcast by European or US TV channels.

Using the same database and the same categories for the statistical analysis, Rovi was able to provide the Observatory with data on the catalogues of seven VoD services as of mid-October 2014. Rovi can make this analysis as it operates the metadata for those services. The seven VoD services granted the permission to Rovi to communicate to the Observatory the results of the statistical analysis of their respective catalogues.

The data purchased covers seven VoD services established in European countries:

- Viewster (established in Switzerland and available throughout Europe and worldwide)
- VideoFutur (established in France)
- SF Anytime (established in Sweden)
- Maxdome (established in Germany)
- Wuaki.tv (established in Spain and available in Spain, in Germany, in France and the United Kingdom)
- Telecom Italia (established in Italy)
- BlinkBox (established in the United Kingdom)

The data purchased cover four different genres of audiovisual works:

- Feature films
- TV films
- TV series (with data on the number of master series, seasons and episodes)
- Animation

Furthermore, regarding the origin of those audiovisual works the data provided by Rovi distinguish between:

- European origin (Germany, France, United Kingdom, Italy, Spain, other European origin)
- Co-productions (European, Mixed, Non-European) [4]
- Non-European (US, Canada, Australia + New Zealand, Japan, Other)

The Rovi data highlight significant differences in size between the different catalogues (more than 16,000 titles for Maxdome compared with 713 for VideoFutur). The proportion of titles by genre also differs widely: 85% of the catalogues

directement sortis en vidéo) composent la majeure partie de l'offre. Au mois de décembre 2013, 69,7 % des programmes disponibles en VoDA sont des films, 4,6 % des séries télévisées et 6 % des séries pour la jeunesse. 1 634 films cinématographiques sont disponibles en VoDA en décembre 2013. Les films français représentent 43, % de l'offre, les films américains 35,7 %, les films européens 15,1 % et les films d'autres nationalités 5,9 %. 1 389 œuvres cinématographiques disponibles en VoDA le sont sur une seule plate-forme (85 %), 217 le sont sur deux plates-formes (13,3 %), 27 sur trois (1,7 %) et une sur quatre (0,001 %). Aucune œuvre n'est disponible sur plus de 4 plates-formes.

Données de Rovi sur les œuvres européennes dans les catalogues des services de VoD

Une autre analyse complète des catalogues a été entreprise en octobre 2014, pour la première fois, par Rovi à la demande de l'Observatoire européen de l'audiovisuel.

Rovi est une société spécialisée dans la fourniture de métadonnées sur les programmes audiovisuels. Son activité de base consiste à fournir des données sur les grilles horaires des chaînes de télévision à la presse et aux fournisseurs de services EPG. Pour faire fonctionner ses services, Rovi a créé une base de données de référence incluant des métadonnées sur les films et les programmes de télévision. Grâce à ces informations, Rovi fournit, depuis 2006, à l'Observatoire européen de l'audiovisuel des analyses statistiques sur l'origine des programmes de fiction diffusés par des chaînes de télévision européennes ou américaines.

En utilisant la même base de données et les mêmes catégories pour l'analyse statistique, Rovi a pu fournir à l'Observatoire des données sur le catalogue de sept services de VoD à la mi-octobre 2014. Rovi est en mesure de procéder à une telle analyse car elle gère les métadonnées pour ces services. Les sept services de VoD ont accordé à Rovi l'autorisation de communiquer à l'Observatoire le résultat de l'analyse statistique de leur catalogue respectif.

Les données acquises couvrent sept services de VoD établis dans différents pays européens :

- Viewster (établi en Suisse et disponible dans toute l'Europe, mais aussi dans le monde entier),
- VideoFutur (établi en France),
- SF Anytime (établi en Suède),
- Maxdome (établi en Allemagne),
- Wuaki.tv (établi en Espagne et disponible en Espagne, en Allemagne, en France et au Royaume-Uni),

machten Filme aus (Spielfilme und Filme, die direkt auf Video veröffentlicht wurden). Im Dezember 2013 waren 69,7 % der Programme, die im Abonnement erhältlich waren, Filme, 4,6 % waren Fernsehserien und 6 % Jugendserien. Die Zahl der Kinofilme, die zu diesem Zeitpunkt im Abonnement erhältlich waren, lag bei 1.634 Kinofilmen. Der Anteil französischer Filme betrug 43,2 %, der amerikanischer Filme 35,7 %, der europäischer Filme 15,1 % und der Anteil von Filmen aus anderen Ländern 5,9 %. 1.389 Spielfilme, die im Abonnement erhältlich waren, standen nur auf einer einzigen Plattform zur Verfügung (85%), 217 auf zwei Plattformen (13,3 %), 27 auf drei (1,7 %) und einer auf vier Plattformen (0,001%). Kein einziger Film war auf mehr als vier Plattformen zugänglich.

ROVI-Daten über europäische Werke in den Katalogen von VoD-Anbietern

Eine weitere umfassende Analyse von Katalogen wurde im Oktober 2014 erstmals von ROVI im Auftrag der Europäischen Audiovisuellen Informationsstelle vorgenommen.

ROVI hat sich auf Metadaten über audiovisuelle Programme spezialisiert. Das Unternehmen liefert in erster Linie Daten über Fernsehprogramme an die Presse und an Anbieter von EPG-Diensten. ROVI kann für ihre Analysen auf eine eigene umfangreiche Referenzdatenbank zurückgreifen, die Metadaten über Filme und Fernsehprogramme enthält. Dank dieser Informationen ist ROVI in der Lage, die Europäische Audiovisuelle Informationsstelle seit 2006 mit statistischen Analysen über die Herkunft von Fiction-Programmen zu versorgen, die von europäischen oder US-amerikanischen Fernsehsendern ausgestrahlt werden.

ROVI nutzt diese Datenbank und dieselben Kategorien, um der Informationsstelle ab Mitte Oktober 2014 Daten über den Katalog von sieben VoD-Anbietern zur Verfügung zu stellen. ROVI kann diese Analyse durchführen, da das Unternehmen über die entsprechenden Metadaten für diese Dienste verfügt. Die sieben VoD-Anbieter haben ROVI erlaubt, die Ergebnisse der statistischen Analyse ihrer Kataloge an die Informationsstelle weiterzuleiten.

Die Daten erfassen sieben VoD-Anbieter mit Sitz in europäischen Ländern:

- Viewster (Sitz in der Schweiz und europaweit erhältlich, aber auch weltweit)
- VideoFutur (Sitz in Frankreich)
- SF Anytime (Sitz in Schweden)
- Maxdome (Sitz in Deutschland)
- Wuaki.tv (Sitz in Spanien und in Spanien, in Deutschland, Frankreich und im Vereinigten Königreich erhältlich)

[4] In our statistical summary European co-production and Mixed co-production (i.e. co-production between European countries and not-European countries) are included in the European total. Non-European co-productions should be considered as mainly US co-productions or portable productions.

of Viewster, SF Anytime, VideoFutur and Wuaki consist of feature films. Maxdome is the service that offers the most films in terms of absolute value but the catalogue of the German service also contains a large number of animated works (39.6% of the titles available) and offers the largest proportion of TV series titles. The proportion of animated works is also substantial in the case of the service of Telecom Italia.

The large proportion of TV series in the Maxdome catalogue can be largely explained by the inclusion of German TV series, which make up 52% of the master series titles and 63% of the episodes. Due to this large proportion of national TV series, as well as the large number of national television films available the service is the only one to offer a range of titles (all genres) consisting of 51.8% national and 66.6% European titles. The proportion of European feature films in the Maxdome catalogue is smaller (40.5%) but is nonetheless the highest in the seven catalogues studied.

The Swedish service SF Anytime contains a good proportion of European titles (44.6%) thanks to the inclusion of European animated works (57%).

By contrast, the free VoD service Viewster (established in Switzerland and therefore not subject to the obligations of Article 13 of the AVMS Directive) has the smallest proportion of European works (17.5%) and the largest proportion of American films (66.3%) in its catalogue.

- Telecom Italia (établi en Italie),
- Blinkbox (établi au Royaume-Uni).

Les données acquises couvrent quatre genres d'œuvres audiovisuelles :

- films de long-métrage,
- téléfilms,
- séries TV (avec des données sur le nombre de titres de séries en première saison, de titres par saison et d'épisodes),
- animation.

En outre, eu égard à l'origine de ces œuvres audiovisuelles, les données fournies par Rovi distinguent les catégories suivantes :

- Origine européenne (Allemagne, France, Royaume-Uni, Italie, Espagne, autre origine européenne),
- Coproductions (européennes, mixtes, non européennes), 4
- Origine non européenne (États-Unis, Canada, Australie et Nouvelle-Zélande, Japon, autres).

Les données de Rovi mettent en évidence de grandes différences de taille entre les différents catalogues (plus de 16 000 titres pour Maxdome contre 713 pour VideoFutur. La proportion des titres par genre est également très différente : les catalogues de Viewster, SF Anytime et VideoFutur et Wuaki sont composés à plus de 85 % de films de long métrage. Maxdome est le service qui propose le plus de films en valeur absolue, mais le catalogue du service allemand est également très riche en animation (39,6 % des titres proposés) et est celui qui propose la plus forte proportion de titres de séries. La proportion d'animation est aussi substantielle sur le service de Telecom Italia.

L'importance des séries TV dans le catalogue de Maxdome s'explique en grande partie par le recours à des séries allemandes, qui représentent 52 % des titres Master et 63 % des épisodes. Cette forte proportion de mise à disposition de séries nationales, mais aussi de téléfilms nationaux permet au service d'être le seul à proposer une offre, tous genres confondus, de 51,8 % de titres nationaux et de 66,6 % de titres européens. La proportion de films de long métrage européen dans le catalogue de Maxdome est moins importante (40,5 %), mais elle est malgré tout la plus élevée des 7 catalogues étudiés.

Le service suédois SF Anytime obtient une proportion de titres européens honorable (44,6 %) grâce à son recours à des œuvres d'animation européenne (57 %).

A l'inverse, le service de VoD gratuite Viewster (établi en Suisse et donc non soumis aux obligations de l'article 13 de la Directive SMA) est celui qui a la plus faible proportion d'œuvres européennes dans son catalogue (17,5 %) et la plus forte proportion de films américains (66,3 %).

- Telecom Italia (Sitz in Italien)
- BlinkBox (Sitz im Vereinigten Königreich)

Die Daten beziehen sich auf vier verschiedene Genres audiovisueller Werke:

- Spielfilme
- Fernsehfilme
- Fernsehserien (mit Daten über die Zahl der Masterserien, Saisonserien und Serienepisoden)
- Animation

Die von ROVI zur Verfügung gestellten Daten unterscheiden zwischen:

- europäischer Herkunft (Deutschland, Frankreich, Vereinigtes Königreich, Italien, Spanien, andere europäische Länder)
- Koproduktionen (europäische, gemischte, nicht-europäische) 4
- nicht-europäischer Herkunft (US, Kanada, Australien + Neuseeland, Japan, sonstige)

Aus den Daten von ROVI geht hervor, dass die einzelnen Kataloge einen sehr unterschiedlichen Umfang haben (mehr als 16 000 Titel bei Maxdome gegenüber 713 bei VideoFutur). Erhebliche Unterschiede gibt es auch beim Anteil der Titel nach Genre: die Kataloge von Viewster, SF Anytime und VideoFutur und Wuaki bestehen zu mehr als 85 % aus Spielfilmen. Maxdome ist der Anbieter, der absolut gesehen die meisten Filme anbietet, aber der Katalog des deutschen Anbieters hat auch sehr viele Zeichentrickfilme (39,6 % der angebotenen Titel) und gleichzeitig auch den größten Anteil an Fernsehserien im Angebot. Auch bei Telecom Italia ist der Anteil an Zeichentrickfilmen sehr hoch.

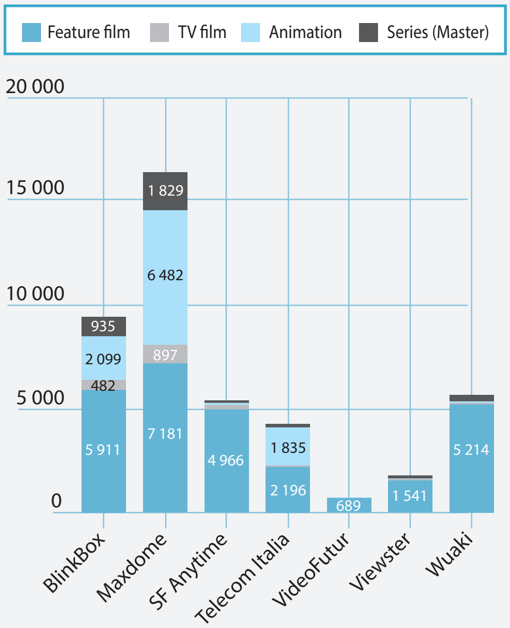
Der Anteil an Fernsehserien im Katalog von Maxdome ist vor allem deshalb so groß, weil Maxdome sehr viele deutsche Fernsehserien in seinem Angebot hat. Diese machen 52 % der Masterserien und 63 % der Serienepisoden aus. Dieser hohe Anteil an nationalen Fernsehserien, aber auch an nationalen Fernsehfilmen ist auch der Grund, warum Maxdome der einzige Anbieter ist, der 51,8 % nationale Titel und 66,6 % europäische Titel in seinem Katalog hat. Der Anteil europäischer Spielfilme im Katalog von Maxdome ist nicht ganz so hoch (40,5 %), aber immer noch der höchste aller sieben Kataloge, die untersucht wurden.

Der schwedische Anbieter SFAnytime kommt ebenfalls auf einen ansehnlichen Anteil europäischer Titel (44,6 %), da er viele europäische Zeichentrickfilme in seinem Angebot hat (57 %).

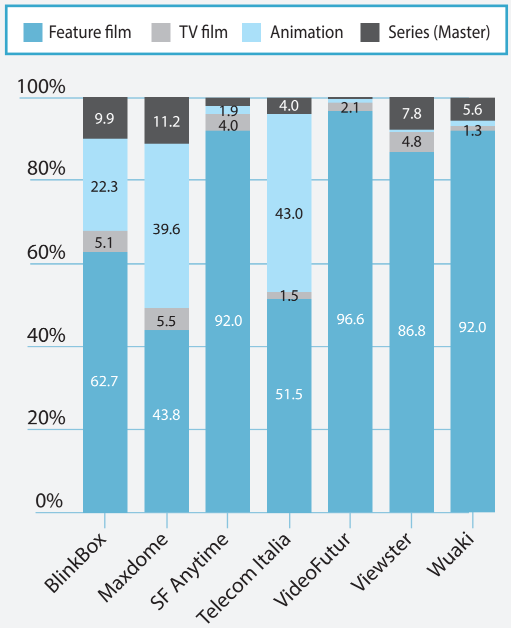
Die Schweizer Plattform Viewster, die VoD kostenlos anbietet (mit Sitz in der Schweiz, d. h. das Unternehmen unterliegt nicht den Verpflichtungen von Artikel 13 der AVMD-Richtlinie), hat dagegen den niedrigsten Anteil an europäischen Werken in ihrem Katalog (17,5 %) und den höchsten Anteil an amerikanischen Filmen (66,3 %).

G.6.10 Breakdown by genre of the catalogues of a sample of VoD services

October 2014 Total number of video works.



October 2014 In units.

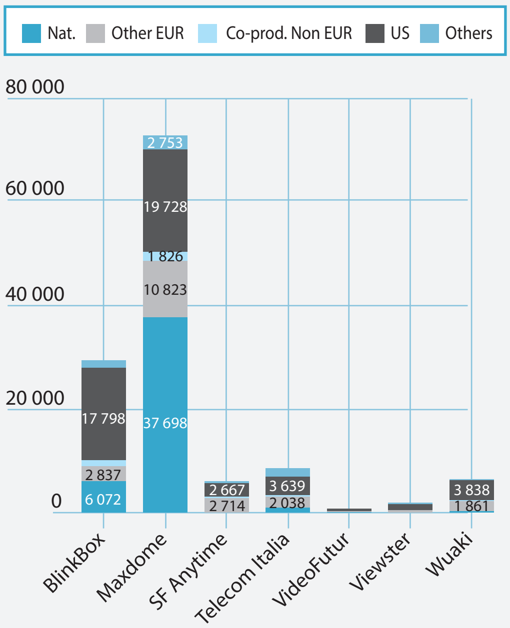


October 2014 In %.

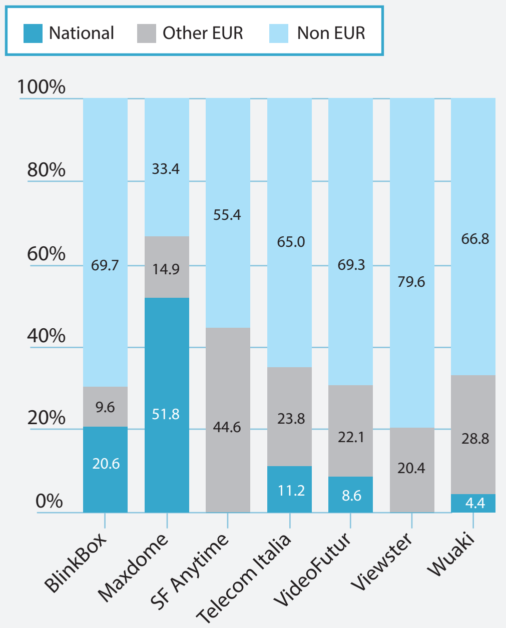
European Audiovisual Obseravtory on ROVI data

G.6.11 Origin of fiction (all genres) available on a sample of VoD catalogues

October 2014 Total number of video works.



October 2014 In units.



October 2014 In %.

European Audiovisual Obseravtory on ROVI data

T.6.12 Origin of feature films available on a sample of VoD catalogues

October 2014 Total number of video works.

	European origin						Co-productions	
Content provider	**DE**	**ES**	**FR**	**GB**	**IT**	**Other EUR**	**European**	**Mixed**
BlinkBox	32	37	135	439	31	120	249	790
Maxdome	694	57	157	213	43	164	432	1 146
SF Anytime	36	47	169	262	31	434	277	729
Telecom Italia	10	25	47	32	230	20	127	332
VideoFutur	5	2	55	15	1	11	21	99
Viewster	12	14	8	59	9	44	31	93
Wuaki	30	254	90	197	15	53	206	888
Total	**819**	**436**	**661**	**1 217**	**360**	**846**	**1 343**	**4 077**

T.6.13 Origin of TV films available on a sample of VoD catalogues

October 2014 Total number of video works.

	European origin						Co-productions	
Content provider	**DE**	**ES**	**FR**	**GB**	**IT**	**Other EUR**	**European**	**Mixed**
BlinkBox	6		1	176	6	28	7	38
Maxdome	441	4	24	14	3	35	55	69
SF Anytime	5	3		16	1	45	20	27
Telecom Italia	2		6	4	8		3	1
VideoFutur	4	1						
Viewster	2	1		1		1	1	8
Wuaki		3		8		2	1	4
Total	**460**	**12**	**31**	**219**	**18**	**111**	**87**	**147**

T.6.14 Origin of TV animation available on a sample of VoD catalogues

October 2014 Total number of video works.

	European origin						Co-productions	
Content provider	**DE**	**ES**	**FR**	**GB**	**IT**	**Other EUR**	**European**	**Mixed**
BlinkBox				637		34	9	61
Maxdome	558	119	512	242	2	6	604	1 167
SF Anytime	1			23		14	7	12
Telecom Italia		36		83	180		122	344
VideoFutur			1					1
Viewster	1							
Wuaki		13	1	2	1	2	2	7
Total	**560**	**168**	**514**	**987**	**183**	**56**	**744**	**1 592**

Non European origin						Total		
Non-Eur.	US	CA	AU+NZ	JP	Other	Total	National	*European (incl. nat.)*
292	3 438	92	69	39	148	5 911	7.4%	***31.0%***
352	3 374	77	57	65	350	7 181	9.7%	***40.5%***
236	2 39	79	53	43	131	4 966	~	***40.0%***
137	1 137	5	13	20	61	2 196	10.5%	***37.5%***
35	415	4	2	10	14	689	8.0%	***30.3%***
45	1 021	29	27	8	141	1 541	~	***17.5%***
249	3 084	23	23	25	77	5 214	4.9%	***33.2%***
1 346	**14 908**	**309**	**244**	**210**	**922**	**27 698**		

➥ ROVI

Non European origin						Total		
Non-Eur.	US	CA	AU+NZ	JP	Other	Total	National	*European (incl. nat.)*
8	201	9			2	482	36.5%	***54.4%***
43	188	11	2		8	897	49.2%	***71.9%***
25	66	9				217	~	***53.9%***
4	33	3				64	12.5%	***37.5%***
	9				1	15	0.0%	***33.3%***
10	51	3			8	86	~	***16.3%***
	43	1				62	4.8%	***29.0%***
90	**591**	**36**	**2**	**0**	**19**	**1 823**		

➥ ROVI

Non European origin						Total		
Non-Eur.	US	CA	AU+NZ	JP	Other	Total	National	*European (incl. nat.)*
11	1 177	1		168	1	2 099	30%	***35%***
260	2 305	206	40	337	124	6 482	9%	***50%***
2	14	6		21		100	~	***57%***
81	344	65		536	44	1 835	10%	***42%***
1	2	1				6	17%	***33%***
	4			5	1	11	~	***9%***
5	36	2		1	2	74	18%	***38%***
360	**3 882**	**281**	**40**	**1 068**	**172**	**10 607**		

➥ ROVI

1 2 3 4 5 6 7 8

T.6.15 Origin of TV series available on a sample of VoD catalogues

October 2014 Total number of video works.

		European origin						Co-productions	
Content provider		DE	ES	FR	GB	IT	Other EUR	European	Mixed
BlinkBox	Series Master	1		4	364	4	18	10	72
	Season Master	1		8	577	12	23	11	101
	Series Episode	3		71	3 879	48	160	78	628
Maxdome	Series Master	951	6	28	94	5	45	49	115
	Season Master	295		2	71	3	17	21	46
	Series Episode	34 759	135	628	998	19	470	1 279	1 724
SF Anytime	Series Master	3			21		45	8	13
	Season Master	2			12		37	5	3
	Series Episode	5			70		250	52	29
Telecom Italia	Series Master		1	4	15	36		5	15
	Season Master			4	22	25		5	12
	Series Episode		36	33	217	478		123	352
VideoFutur	Series Master			1					
	Season Master			1					
	Series Episode			4					
Viewster	Series Master	1		1	25		5		3
	Season Master				34		4		7
	Series Episode	2			13		12		1
Wuaki	Series Master		6		92		2	4	19
	Season Master		6		182		5	3	41
	Series Episode				3			1	
Total		**36 023**	**190**	**789**	**6 689**	**630**	**1 093**	**1 654**	**3 181**

T.6.16 Origin of fiction (all genres) available on a sample of VoD catalogues

October 2014 Total number of video works.

	European origin						Co-productions	
Content provider	DE	ES	FR	GB	IT	Other EUR	European	Mixed
BlinkBox	43	37	219	6 072	101	383	364	1 690
Maxdome	37 698	321	1 351	1 632	75	737	2 440	4 267
SF Anytime	52	50	169	404	32	825	369	813
Telecom Italia	12	98	94	373	957	20	385	1 056
VideoFutur	9	3	62	15	1	11	21	100
Viewster	18	15	9	132	9	66	32	112
Wuaki	30	282	91	484	16	64	217	959
Total	**37 862**	**806**	**1 995**	**9 112**	**1 191**	**2 106**	**3 828**	**8 997**

Non European origin						Total		
Non-Eur.	US	CA	AU+NZ	JP	Other	Total	National	*European (incl. nat.)*
32	356	14	8	20	32	935	38.9%	***50.6%***
68	832	23	9	23	30	1 718	33.6%	***42.7%***
786	11 794	254	51	449	66	18 267	21.2%	***26.6%***
47	395	27	15	14	38	1 829	52.0%	***70.7%***
52	719	9	5	1	18	1 259	23.4%	***36.1%***
1 072	12 747	319	377	371	282	55 180	63.0%	***72.5%***
4	17	2	1	3		117	~	***76.9%***
2	11					72	~	***81.9%***
60	120	12		19		617	~	***65.8%***
6	58	4	1	17	7	169	21.3%	***45.0%***
7	106	5	1		1	188	13.3%	***36.2%***
94	1 961	113	12	556	124	4 099	11.7%	***30.2%***
	2					3	33.3%	***33.3%***
						1	100.0%	***100.0%***
	6					10	40.0%	***40.0%***
6	41	13	7	11	25	138	~	***25.4%***
4	14	12	10	1	8	94	~	***47.9%***
4	13	5	5		3	58	~	***48.3%***
8	172	5			11	319	1.9%	***38.6%***
25	501	10			12	785	0.8%	***30.2%***
	2					6	0.0%	***66.7%***
2 277	**29 867**	**827**	**502**	**1 485**	**657**	**85 864**		

➥ ROVI

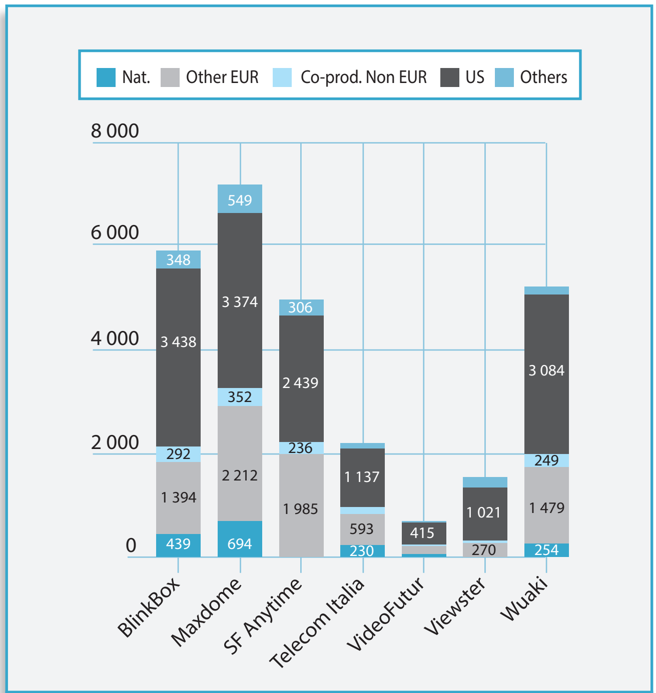
Non European origin						Total		
Non-Eur.	US	CA	AU+NZ	JP	Other	Total	National	*European (incl. nat.)*
1 197	17 798	393	137	699	279	29 412	20.6%	***30.3%***
1 826	19 728	649	496	788	820	72 828	51.8%	***66.6%***
329	2 667	108	54	86	131	6 089	~	***44.6%***
329	3 639	195	27	1 129	237	8 551	11.2%	***35.0%***
36	434	5	2	10	15	724	8.6%	***30.7%***
69	1 144	62	49	25	186	1 928	~	***20.4%***
287	3 838	41	23	26	102	6 460	4.4%	***33.2%***
4 073	**49 248**	**1 453**	**788**	**2 763**	**1 770**	**125 992**		

➥ ROVI

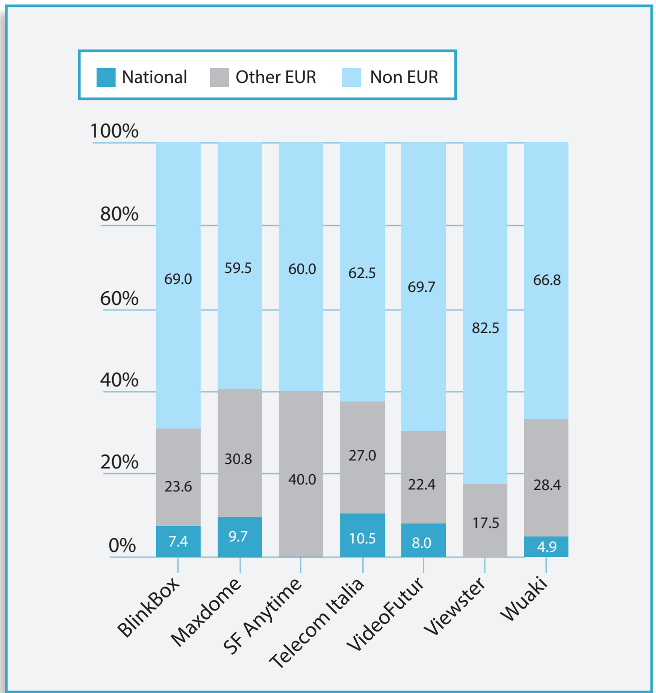
G.6.12 Origin of the various fiction genres available on a sample of VoD catalogues

October 2014 Total number of video works.

Feature films



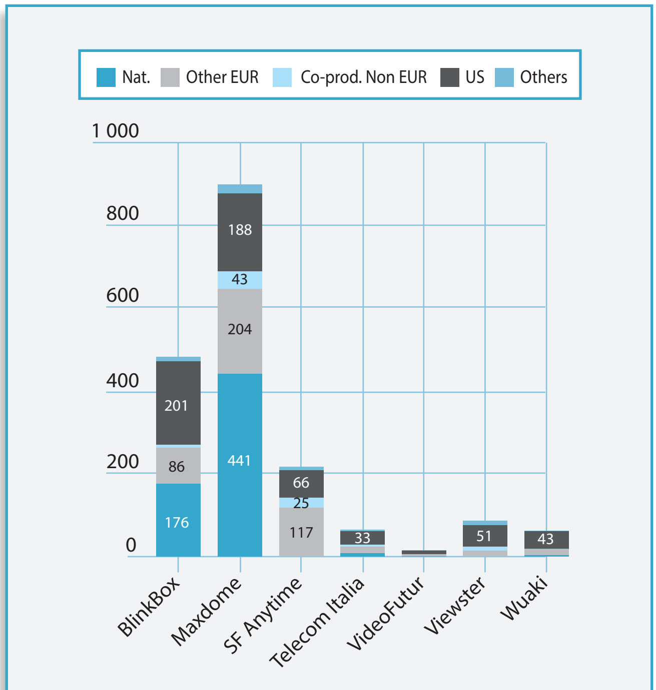
October 2014 In units.



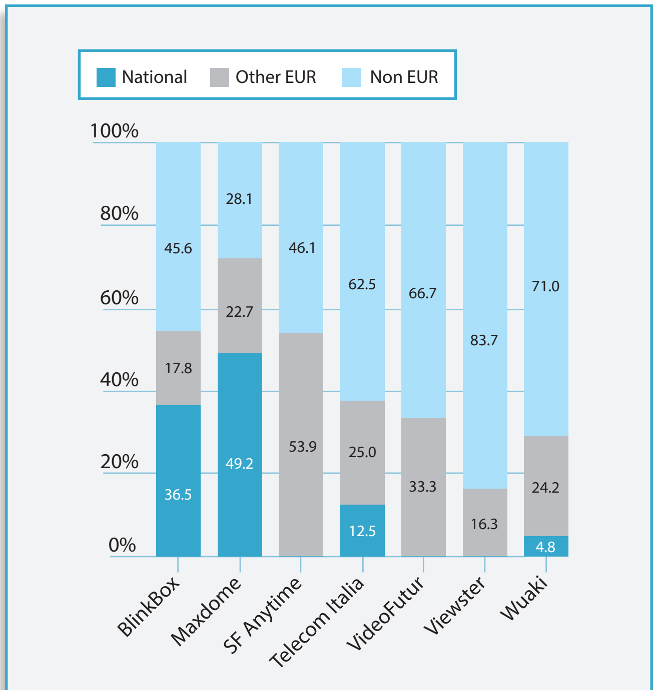
October 2014 In %.

ROVI

TV films



October 2014 In units.



October 2014 In %.

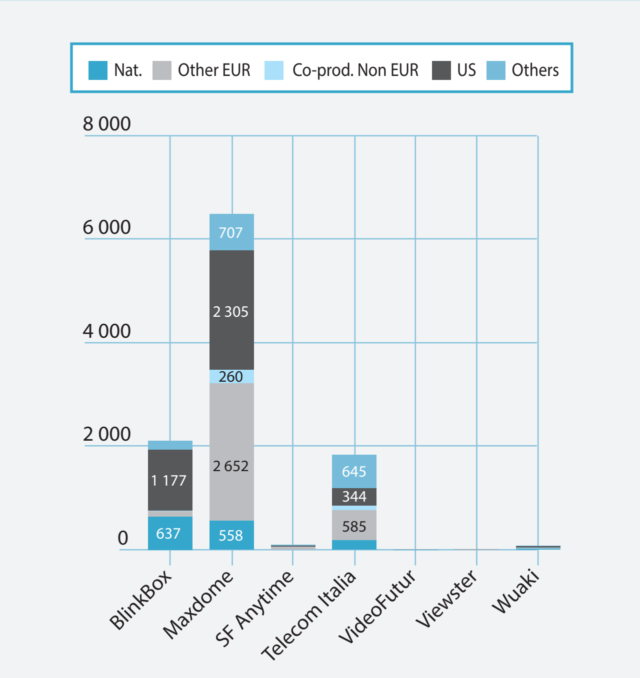
ROVI

G.6.12 Origin of the various fiction genres available on a sample of VoD catalogues

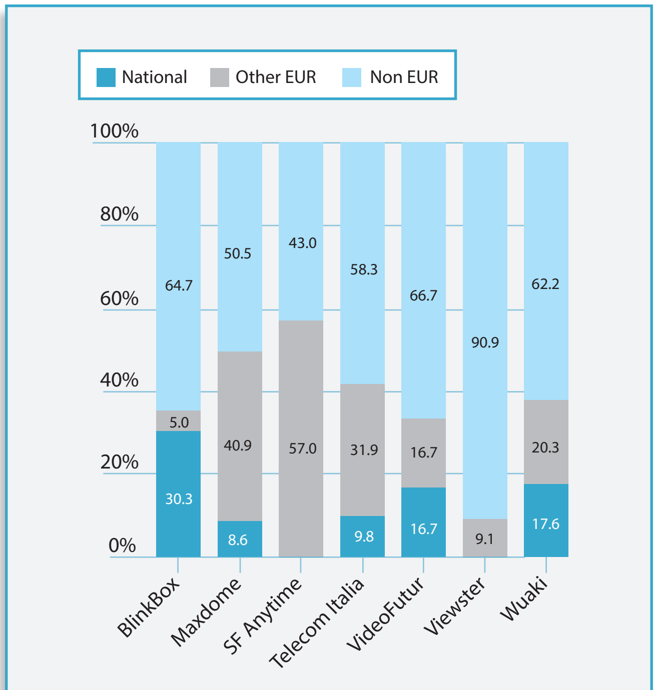
October 2014 Total number of video works.

continued

Animation



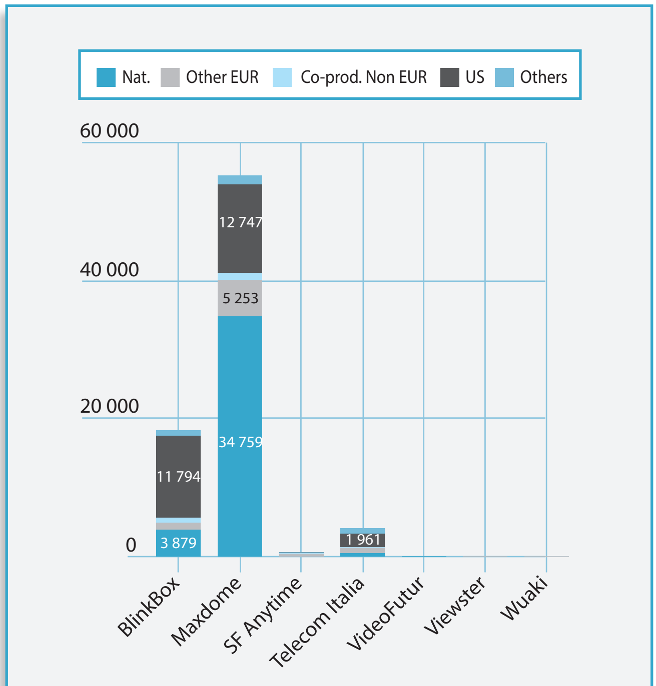
October 2014 In units.



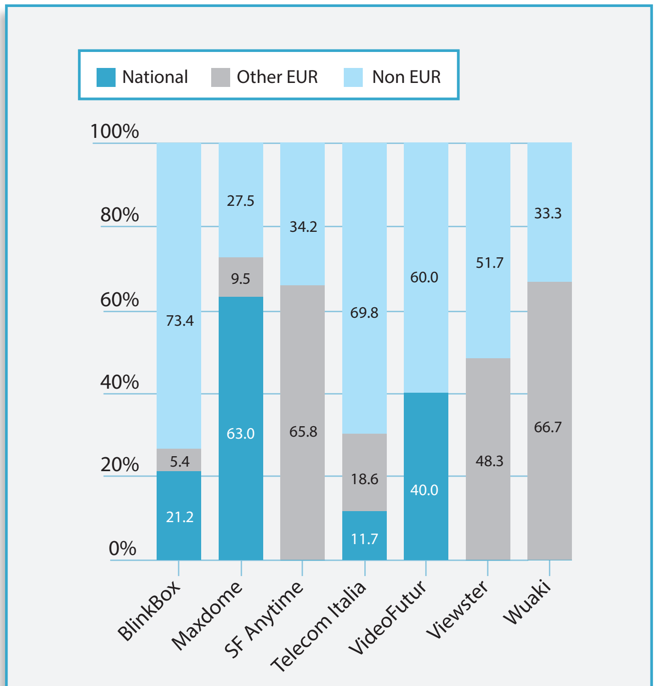
October 2014 In %.

ROVI

TV series (episodes)



October 2014 In units.



October 2014 In %.

ROVI

T.6.17 Internet downstream peak period traffic composition in North America and Europe

1st semester 2014

	Fixed		Mobile	
	North America	Europe	North America	Europe
Real-time entertainment	63.87%	43.34%	39.55%	35.58%
Social networking			21.30%	18.65%
Web browsing	12.60%	18.63%	13.61%	19.68%
Filesharing	3.89%	12.30%		
Tunneling	3.86%	6.76%	8.61%	6.16%
Marketplaces	6.75%	6.57%	9.35%	9.91%
Others	9.03%	12.39%	7.57%	10.03%

➡ Sandvine Global Internet Phenomena Report 1H 2014

T.6.18 Internet top 10 peak period applications in North America and Europe

1st semester 2014

	Fixed		Mobile	
	North America	Europe	North America	Europe
Netflix	34.21%	3.23%	5.05%	3.89%
YouTube	13.19%	19.27%	17.61%	16.54%
HTTP	11.65%	17.46%	12.70%	17.65%
iTunes	3.64%	2.23%	3.10%	3.48%
SSL	3.42%	6.19%	6.52%	5.68%
BitTorrent	3.40%	11.10%		2.60%
MPEG	2.85%	3.54%	8.64%	4.23%
Facebook	1.99%	3.88%	14.03%	12.85%
Amazon Video	1.90%			
Hulu	1.74%			
Google Market			5.27%	2.66%
Pandora Radio			5.15%	
Instagram			3.49%	1.92%
RTMP		3.66%		
Flash Video		2.37%		
Others	23.76%	29.31%	21.54%	30.41%

➡ Sandvine Global Internet Phenomena Report 1H 2014

CHAPTER
CHAPITRE
KAPITEL
7

Film and cinema

Film et cinéma

Film und Kino

LUMIERE

http://lumiere.obs.coe.int

Free access

DATABASE ON ADMISSIONS OF FILMS RELEASED IN EUROPE

Main features

- Yearly admissions to more than 34 000 films released in Europe since 1996
- Release dates
- Identification of distributors
- Country-by-country breakdown
- Original title and alternative language titles
- Graphs and breakdown of EU-admissions
- Covers 30 European countries and the North American market (USA and Canada)
- Clearly identified data sources
- Annual updates
- ISAN (International Standard Audiovisual Number)
- All listings exportable as an EXCEL table

[European Audiovisual Observatory] [Presentation of the LUMIERE Database] [Other search]

Film Information

Slumdog Millionaire (EN) *[Original title]*
The Millionaire (EN)
[IMDb Info]

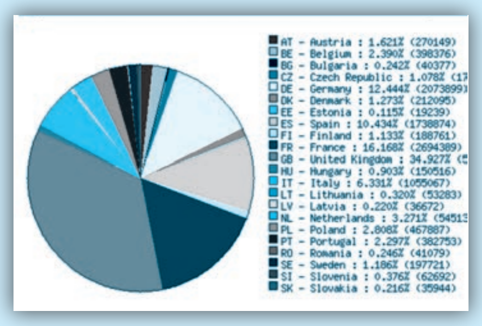
Directors :
Danny Boyle [IMDb Info]
Loveleen Tandan [IMDb Info]

Producing or Co-producing country : GB
Production year : 2008

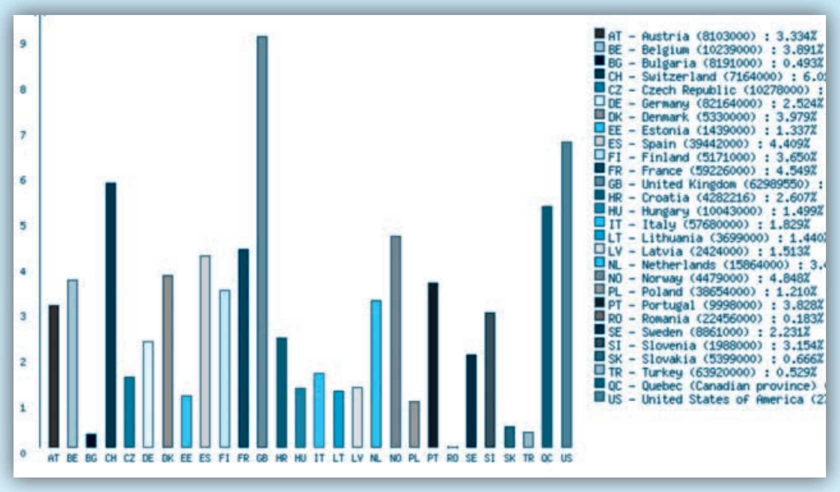
Admissions

Market	Distributor	Release date	2008	2009	2010	2011	Total since 2008
AT	Filmladen	20/03/2009		269 054	1 095		270 149
BE	Cineart	14/12/2008	167	385 189	13 020		398 376
BG	Forum Film	13/02/2009		40 368	9		40 377
CH	Pathé Films (CH)	24/12/2008	212	429 892	581		430 685
CZ	Bontonfilm	26/02/2009		177 237	1 644	818	179 699
DE	Prokino Filmverleih	19/03/2009		2 068 485	5 414		2 073 899
DK	SF-Film	06/03/2009		211 742	353		212 095
EE	Acme Film	13/03/2009		18 873	366		19 239
ES	Filmax (SOGEDASA)	10/02/2009		1 738 874			1 738 874
FI	Fs Film Oy	13/03/2009		187 740	1 021		188 761

LUMIERE delivers precise annual admission figures for ***30 European countries, USA and Canada.***



Visualise the annual breakdown of admissions ***in the national markets in the European Union.***



Percentage of the ***population having seen the film.***

OBSERVATOIRE EUROPÉEN DE L'AUDIOVISUEL
EUROPEAN AUDIOVISUAL OBSERVATORY
EUROPÄISCHE AUDIOVISUELLE INFORMATIONSSTELLE

COUNCIL OF EUROPE
CONSEIL DE L'EUROPE

T.7.1

Number of theatrical feature films produced in Europe

2010-2013

In units. Films: a. completed (answer print) b. released c. granted public support d. certified e. officially recognised f. starting principal photography g. rated.

Country		Film type	2010	2011	2012	2013	Source
AT	b.	Fiction - 100% nat.	10	14	9	18	OFI
		Fiction - maj. co-prod.	4	6	6	5	
		Fiction - min. co-prod.	6	15	8	2	
		Total national fiction films	***14***	***20***	***15***	***23***	
		Total fiction films (incl. min. co-prod.)	***20***	***35***	***23***	***25***	
		Feature documentaries - 100% nat.	16	19	21	14	
		Feature documentaries - maj. co-prod.	4	3	7	4	
		Feature documentaries - min. co-prod.	4	2	3	3	
		Total national feature documentaries	***20***	***22***	***28***	***18***	
		Total feature docs (incl. min. co-prod.)	***24***	***24***	***31***	***21***	
		Total feature films - 100% nat.	26	33	30	32	
		Total feature films - maj. co-prod.	8	9	13	9	
		Total feature films - min. co-prod.	10	17	11	5	
		Total national feature films	**34**	**42**	**43**	**41**	
		Total feature films (incl. min. co-prod.)	**44**	**59**	**54**	**46**	
BA	b.	Fiction - 100% nat.	1	0	0	2	Sarajevo Film Festival
		Fiction - maj. co-prod.	4	2	1	3	
		Fiction - min. co-prod.	0	2	1	5	
		Total national fiction films	***5***	***2***	***1***	***5***	
		Total fiction films (incl. min. co-prod.)	***5***	***4***	***2***	***10***	
		Feature documentaries - 100% nat.	0	3	0	1	
		Feature documentaries - maj. co-prod.	0	0	0	0	
		Feature documentaries - min. co-prod.	0	0	0	0	
		Total national feature documentaries	***0***	***3***	***0***	***1***	
		Total feature docs (incl. min. co-prod.)	***0***	***3***	***0***	***1***	
		Total feature films - 100% nat.	1	3	0	3	
		Total feature films - maj. co-prod.	4	2	1	3	
		Total feature films - min. co-prod.	0	2	1	5	
		Total national feature films	**5**	**5**	**1**	**6**	
		Total feature films (incl. min. co-prod.)	**5**	**7**	**2**	**11**	
BE 1	b.	Fiction - 100% nat.	2	5	6	13	CFWB, VAF
	e.	Fiction - maj. co-prod.	16	12	14	17	
		Fiction - min. co-prod.	24	21	27	34	
		Total national fiction films	***18***	***17***	***20***	***30***	
		Total fiction films (incl. min. co-prod.)	***42***	***38***	***47***	***64***	
		Feature documentaries - 100% nat.	0	2	1	4	
		Feature documentaries - maj. co-prod.	3	1	3	1	
		Feature documentaries - min. co-prod.	1	1	4	1	
		Total national feature documentaries	***3***	***3***	***4***	***5***	
		Total feature docs (incl. min. co-prod.)	***4***	***4***	***8***	***6***	
		Total feature films - 100% nat.	2	7	7	17	
		Total feature films - maj. co-prod.	19	13	17	18	
		Total feature films - min. co-prod.	25	22	31	35	
		Total national feature films	**21**	**20**	**24**	**35**	
		Total feature films (incl. min. co-prod.)	**46**	**42**	**55**	**70**	
BG	b.	Fiction - 100% nat.	6	6	5	0	NFC
		Fiction - maj. co-prod.	1	2	1	4	
		Fiction - min. co-prod.	3	1	2	0	
		Total national fiction films	***7***	***8***	***6***	***4***	
		Total fiction films (incl. min. co-prod.)	***10***	***9***	***8***	***4***	
		Feature documentaries - 100% nat.	4	4	7	8	
		Feature documentaries - maj. co-prod.	0	0	1	2	
		Feature documentaries - min. co-prod.	1	2	3	1	
		Total national feature documentaries	***4***	***4***	***8***	***10***	
		Total feature docs (incl. min. co-prod.)	***5***	***6***	***11***	***11***	
		Total feature films - 100% nat.	10	10	12	8	

T.7.1 Number of theatrical feature films produced in Europe

2010-2013 In units. Films: a. completed (answer print) b. released c. granted public support d. certified e. officially recognised f. starting principal photography g. rated.

continued

Country		Film type	2010	2011	2012	2013	Source
(BG)		Total feature films - maj. co-prod.	1	2	2	6	
		Total feature films - min. co-prod.	4	3	5	1	
		Total national feature films	**11**	**12**	**14**	**14**	
		Total feature films (incl. min. co-prod.)	**15**	**15**	**19**	**15**	
CH	b.	Fiction - 100% nat.	25	14	16	15	OFS
		Fiction - maj. co-prod.	14	11	8	13	
		Fiction - min. co-prod.	11	8	9	13	
		Total national fiction films	***39***	***25***	***24***	***28***	
		Total fiction films (incl. min. co-prod.)	***50***	***33***	***33***	***41***	
		Feature documentaries - 100% nat.	46	65	38	47	
		Feature documentaries - maj. co-prod.	15	8	19	8	
		Feature documentaries - min. co-prod.	2	9	3	8	
		Total national feature documentaries	***61***	***73***	***57***	***55***	
		Total feature docs (incl. min. co-prod.)	***63***	***82***	***60***	***63***	
		Total feature films - 100% nat.	71	79	54	62	
		Total feature films - maj. co-prod.	29	19	27	21	
		Total feature films - min. co-prod.	13	17	12	21	
		Total national feature films	**100**	**98**	**81**	**83**	
		Total feature films (incl. min. co-prod.)	**113**	**115**	**93**	**104**	
CY *est.*	a.	Fiction - 100% nat.	1	0	0	0	OBS
		Fiction - maj. co-prod.	0	2	1	0	
		Fiction - min. co-prod.	1	0	0	1	
		Total national fiction films	***1***	***2***	***1***	***0***	
		Total fiction films (incl. min. co-prod.)	***2***	***2***	***1***	***1***	
		Feature documentaries - 100% nat.	0	0	1	0	
		Feature documentaries - maj. co-prod.	0	0	0	0	
		Feature documentaries - min. co-prod.	0	0	0	0	
		Total national feature documentaries	***0***	***0***	***1***	***0***	
		Total feature docs (incl. min. co-prod.)	***0***	***0***	***1***	***0***	
		Total feature films - 100% nat.	1	0	1	0	
		Total feature films - maj. co-prod.	0	2	1	0	
		Total feature films - min. co-prod.	1	0	0	1	
		Total national feature films	**1**	**2**	**2**	**0**	
		Total feature films (incl. min. co-prod.)	**2**	**2**	**2**	**1**	
CZ	b.	Fiction - 100% nat.	16	21	23	19	SFK
		Fiction - maj. co-prod.	4	4	5	8	
		Fiction - min. co-prod.	5	0	4	2	
		Total national fiction films	***20***	***25***	***28***	***27***	
		Total fiction films (incl. min. co-prod.)	***25***	***25***	***32***	***29***	
		Feature documentaries - 100% nat.	13	17	15	16	
		Feature documentaries - maj. co-prod.	2	2	0	1	
		Feature documentaries - min. co-prod.	0	1	0	1	
		Total national feature documentaries	***15***	***19***	***15***	***17***	
		Total feature docs (incl. min. co-prod.)	***15***	***20***	***15***	***18***	
		Total feature films - 100% nat.	29	38	38	35	
		Total feature films - maj. co-prod.	6	6	5	9	
		Total feature films - min. co-prod.	5	1	4	3	
		Total national feature films	**35**	**44**	**43**	**44**	
		Total feature films (incl. min. co-prod.)	**40**	**45**	**47**	**47**	
DE	b.	Fiction - 100% nat.	61	63	86	79	SPIO
		Fiction - maj. co-prod.	23	29	32	38	
		Fiction - min. co-prod.	35	31	36	37	
		Total national fiction films	***84***	***92***	***118***	***117***	
		Total fiction films (incl. min. co-prod.)	***119***	***123***	***154***	***154***	
		Feature documentaries - 100% nat.	57	68	67	65	

T.7.1

Number of theatrical feature films produced in Europe

2010-2013 In units. Films: a. completed (answer print) b. released c. granted public support d. certified e. officially recognised f. starting principal photography g. rated.

continued

Country		Film type	2010	2011	2012	2013	Source
(DE)		Feature documentaries - maj. co-prod.	14	11	15	13	
		Feature documentaries - min. co-prod.	3	3	5	4	
		Total national feature documentaries	***71***	***79***	***82***	***78***	
		Total feature docs (incl. min. co-prod.)	***74***	***82***	***87***	***82***	
		Total feature films - 100% nat.	118	131	153	144	
		Total feature films - maj. co-prod.	37	40	47	51	
		Total feature films - min. co-prod.	38	34	41	41	
		Total national feature films	**155**	**171**	**200**	**195**	
		Total feature films (incl. min. co-prod.)	**193**	**205**	**241**	**236**	
DK	c.	Fiction - 100% nat.	16	16	12	13	DFI
		Fiction - maj. co-prod.	7	3	6	9	
		Fiction - min. co-prod.	7	6	9	9	
		Total national fiction films	***23***	***19***	***18***	***22***	
		Total fiction films (incl. min. co-prod.)	***30***	***25***	***27***	***31***	
		Feature documentaries - 100% nat.	17	31	11	23	
		Feature documentaries - maj. co-prod.	4	0	12	5	
		Feature documentaries - min. co-prod.	9	6	4	5	
		Total national feature documentaries	***21***	***31***	***23***	***28***	
		Total feature docs (incl. min. co-prod.)	***30***	***37***	***27***	***33***	
		Total feature films - 100% nat.	33	47	23	36	
		Total feature films - maj. co-prod.	11	3	18	14	
		Total feature films - min. co-prod.	16	12	13	14	
		Total national feature films	**44**	**50**	**41**	**50**	
		Total feature films (incl. min. co-prod.)	**60**	**62**	**54**	**64**	
EE	b.	Fiction - 100% nat.	0	4	5	4	EFSA
		Fiction - maj. co-prod.	3	3	0	3	
		Fiction - min. co-prod.	1	0	6	0	
		Total national fiction films	***3***	***7***	***5***	***7***	
		Total fiction films (incl. min. co-prod.)	***4***	***7***	***11***	***7***	
		Feature documentaries - 100% nat.	14	9	8	9	
		Feature documentaries - maj. co-prod.	2	3	1	1	
		Feature documentaries - min. co-prod.	3	2	0	2	
		Total national feature documentaries	***16***	***12***	***9***	***10***	
		Total feature docs (incl. min. co-prod.)	***19***	***14***	***9***	***12***	
		Total feature films - 100% nat.	14	13	13	13	
		Total feature films - maj. co-prod.	5	6	1	4	
		Total feature films - min. co-prod.	4	2	6	2	
		Total national feature films	**19**	**19**	**14**	**17**	
		Total feature films (incl. min. co-prod.)	**23**	**21**	**20**	**19**	
ES	d.	Total feature films - 100% nat.	151	151	126	134	ICAA
		Total feature films - maj. co-prod.	34	29	31	58	
		Total feature films - min. co-prod.	15	19	25	38	
		Total national feature films	**185**	**180**	**157**	**192**	
		Total feature films (incl. min. co-prod.)	**200**	**199**	**182**	**230**	
FI 2	b.	Fiction - 100% nat.	12	15	20	14	FFF
	c.	Fiction - maj. co-prod.	2	5	4	5	
		Fiction - min. co-prod.	5	7	4	6	
		Total national fiction films	***14***	***20***	***24***	***19***	
		Total fiction films (incl. min. co-prod.)	***19***	***27***	***28***	***25***	
		Feature documentaries - 100% nat.	9	6	10	9	
		Feature documentaries - maj. co-prod.	0	0	0	3	
		Feature documentaries - min. co-prod.	4	2	6	6	
		Total national feature documentaries	***9***	***6***	***10***	***12***	
		Total feature docs (incl. min. co-prod.)	***13***	***8***	***16***	***18***	
		Total feature films - 100% nat.	21	21	30	23	

T.7.1

Number of theatrical feature films produced in Europe 2010-2013

In units. Films: a. completed (answer print) b. released c. granted public support d. certified e. officially recognised f. starting principal photography g. rated.

continued

Country		Film type	2010	2011	2012	2013	Source
(FI)		Total feature films - maj. co-prod.	2	5	4	8	
		Total feature films - min. co-prod.	9	9	10	12	
		Total national feature films	**23**	**26**	**34**	**31**	
		Total feature films (incl. min. co-prod.)	**32**	**35**	**44**	**43**	
FR	e.	Fiction - 100% nat.	123	124	116	123	CNC
		Fiction - maj. co-prod.	54	54	55	50	
		Fiction - min. co-prod.	56	58	66	59	
		Total national fiction films	***177***	***178***	***171***	***173***	
		Total fiction films (incl. min. co-prod.)	***233***	***236***	***237***	***232***	
		Feature documentaries - 100% nat.	20	28	34	31	
		Feature documentaries - maj. co-prod.	6	3	4	5	
		Feature documentaries - min. co-prod.	2	5	4	2	
		Total national feature documentaries	***26***	***31***	***38***	***36***	
		Total feature docs (incl. min. co-prod.)	***28***	***36***	***42***	***38***	
		Total feature films - 100% nat.	143	152	150	154	
		Total feature films - maj. co-prod.	60	57	59	55	
		Total feature films - min. co-prod.	58	63	70	61	
		Total national feature films	**203**	**209**	**209**	**209**	
		Total feature films (incl. min. co-prod.)	**261**	**272**	**279**	**270**	
GB	f.	Fiction - 100% nat.	250	210	195	174	BFI
		Fiction - maj. co-prod.	17	14	16	20	
		Fiction - min. co-prod.	11	17	17	17	
		Total national fiction films	***267***	***224***	***211***	***194***	
		Total fiction films (incl. min. co-prod.)	***278***	***241***	***228***	***211***	
		Feature documentaries - 100% nat.	53	54	46	29	
		Feature documentaries - maj. co-prod.	8	8	8	3	
		Feature documentaries - min. co-prod.	0	6	4	2	
		Total national feature documentaries	***61***	***62***	***54***	***32***	
		Total feature docs (incl. min. co-prod.)	***61***	***68***	***58***	***34***	
		Total feature films - 100% nat.	303	264	241	203	
		Total feature films - maj. co-prod.	25	22	24	23	
		Total feature films - min. co-prod.	11	23	21	19	
		Total national feature films	**328**	**286**	**265**	**226**	
		Total feature films (incl. min. co-prod.)	339	309	286	245	
		Inward features [3]	30	31	38	50	
		Total feature films (incl. min. co-prod.)	**369**	**340**	**324**	**295**	
GR	b.	Fiction - 100% nat.	14	17	12	12	GFC
		Fiction - maj. co-prod.	1	10	7	3	
		Fiction - min. co-prod.	1	1	3	2	
		Total national fiction films	***15***	***27***	***19***	***15***	
		Total fiction films (incl. min. co-prod.)	***16***	***28***	***22***	***17***	
		Feature documentaries - 100% nat.	2	4	7	12	
		Feature documentaries - maj. co-prod.	0	1	2	11	
		Feature documentaries - min. co-prod.	0	0	0	0	
		Total national feature documentaries	***2***	***5***	***9***	***23***	
		Total feature docs (incl. min. co-prod.)	***2***	***5***	***9***	***23***	
		Total feature films - 100% nat.	16	21	19	24	
		Total feature films - maj. co-prod.	1	11	9	14	
		Total feature films - min. co-prod.	1	1	3	2	
		Total national feature films	**17**	**32**	**28**	**38**	
		Total feature films (incl. min. co-prod.)	**18**	**33**	**31**	**40**	
HR	a.	Fiction - 100% nat.	5	8	9	14	HAC
		Fiction - maj. co-prod.	4	2	4	2	
		Fiction - min. co-prod.	2	10	3	8	
		Total national fiction films	***9***	***10***	***13***	***16***	

T.7.1

continued

Number of theatrical feature films produced in Europe

2010-2013 In units. Films: a. completed (answer print) b. released c. granted public support d. certified e. officially recognised f. starting principal photography g. rated.

Country		Film type	2010	2011	2012	2013	Source
(HR)		***Total fiction films (incl. min. co-prod.)***	***11***	***20***	***16***	***24***	
		Feature documentaries - 100% nat.	0	0	1	0	
		Feature documentaries - maj. co-prod.	0	0	0	0	
		Feature documentaries - min. co-prod.	0	0	0	0	
		Total national feature documentaries	***0***	***0***	***1***	***0***	
		Total feature docs (incl. min. co-prod.)	***0***	***0***	***1***	***0***	
		Total feature films - 100% nat.	5	8	10	14	
		Total feature films - maj. co-prod.	4	2	4	2	
		Total feature films - min. co-prod.	2	10	3	8	
		Total national feature films	**9**	**10**	**14**	**16**	
		Total feature films (incl. min. co-prod.)	**11**	**20**	**17**	**24**	
HU	b.	Fiction - 100% nat.	26	38	26	27	NFO
		Fiction - maj. co-prod.	1	2	0	2	
		Fiction - min. co-prod.	9	4	1	3	
		Total national fiction films	***27***	***40***	***26***	***29***	
		Total fiction films (incl. min. co-prod.)	***36***	***44***	***27***	***32***	
		Feature documentaries - 100% nat.	2	4	4	5	
		Feature documentaries - maj. co-prod.	1	0	1	1	
		Feature documentaries - min. co-prod.	0	0	0	0	
		Total national feature documentaries	***3***	***4***	***5***	***6***	
		Total feature docs (incl. min. co-prod.)	***3***	***4***	***5***	***6***	
		Total feature films - 100% nat.	28	42	30	32	
		Total feature films - maj. co-prod.	2	2	1	3	
		Total feature films - min. co-prod.	9	4	1	3	
		Total national feature films	**30**	**44**	**31**	**35**	
		Total feature films (incl. min. co-prod.)	**39**	**48**	**32**	**38**	
IE	f.	Fiction - 100% nat.	4	4	4	4	IFB
		Fiction - maj. co-prod.	10	9	9	9	
		Fiction - min. co-prod.	9	4	10	6	
		Total national fiction films	***14***	***13***	***13***	***13***	
		Total fiction films (incl. min. co-prod.)	***23***	***17***	***23***	***19***	
		Feature documentaries - 100% nat.	9	7	8	9	
		Feature documentaries - maj. co-prod.	4	3	2	3	
		Feature documentaries - min. co-prod.	2	5	6	3	
		Total national feature documentaries	***13***	***10***	***10***	***12***	
		Total feature docs (incl. min. co-prod.)	***15***	***15***	***16***	***15***	
		Total feature films - 100% nat.	13	11	12	13	
		Total feature films - maj. co-prod.	14	12	11	12	
		Total feature films - min. co-prod.	11	9	16	9	
		Total national feature films	**27**	**23**	**23**	**25**	
		Total feature films (incl. min. co-prod.)	**38**	**32**	**39**	**34**	
IS	b.	Total feature films - 100% nat.	7	7	~	~	HI
		Total feature films - maj. co-prod.	3	3	~	~	
		Total feature films - min. co-prod.	1	0	~	~	
		Total national feature films	**10**	**10**	**~**	**~**	
		Total feature films (incl. min. co-prod.)	**11**	**10**	**~**	**~**	
IT	g.	Fiction - 100% nat.	~	109	109	115	MiBAC
		Fiction - maj. co-prod.	~	14	19	14	
		Fiction - min. co-prod.	~	8	16	7	
		Total national fiction films	***~***	***123***	***128***	***129***	
		Total fiction films (incl. min. co-prod.)	***~***	***131***	***144***	***136***	
		Feature documentaries - 100% nat.	~	23	20	23	
		Feature documentaries - maj. co-prod.	~	0	2	4	
		Feature documentaries - min. co-prod.	~	1	0	4	
		Total national feature documentaries	***~***	***23***	***22***	***27***	

T.7.1 *continued*

Number of theatrical feature films produced in Europe

2010-2013 In units. Films: a. completed (answer print) b. released c. granted public support d. certified e. officially recognised f. starting principal photography g. rated.

Country		Film type	2010	2011	2012	2013	Source
(IT)		***Total feature docs (incl. min. co-prod.)***	***~***	***24***	***22***	***31***	
		Total feature films - 100% nat.	114	132	129	138	
		Total feature films - maj. co-prod.	14	14	21	18	
		Total feature films - min. co-prod.	13	9	16	11	
		Total national feature films	**128**	**146**	**150**	**156**	
		Total feature films (incl. min. co-prod.)	**141**	**155**	**166**	**167**	
LT	b.	Fiction - 100% nat.	4	2	3	7	LKC/Baltic Films
		Fiction - maj. co-prod.	1	0	1	1	
		Fiction - min. co-prod.	0	0	0	2	
		Total national fiction films	***5***	***2***	***4***	***8***	
		Total fiction films (incl. min. co-prod.)	***5***	***2***	***4***	***10***	
		Feature documentaries - 100% nat.	~	~	5	5	
		Feature documentaries - maj. co-prod.	~	~	0	0	
		Feature documentaries - min. co-prod.	~	~	0	1	
		Total national feature documentaries	***~***	***~***	***5***	***5***	
		Total feature docs (incl. min. co-prod.)	***6***	***9***	***5***	***6***	
		Total feature films - 100% nat.	~	~	8	12	
		Total feature films - maj. co-prod.	~	~	1	1	
		Total feature films - min. co-prod.	~	~	0	3	
		Total national feature films	**~**	**~**	**9**	**13**	
		Total feature films (incl. min. co-prod.)	**11**	**11**	**9**	**16**	
LU 4	d.	Fiction - 100% nat.	1	0	~	~	LFF
		Fiction - maj. co-prod.	1	3	~	~	
		Fiction - min. co-prod.	14	12	~	~	
		Total national fiction films	***2***	***3***	***~***	***~***	
		Total fiction films (incl. min. co-prod.)	***16***	***15***	***~***	***~***	
		Feature documentaries - 100% nat.	2	1	~	~	
		Feature documentaries - maj. co-prod.	1	0	~	~	
		Feature documentaries - min. co-prod.	2	0	~	~	
		Total national feature documentaries	***3***	***1***	***~***	***~***	
		Total feature docs (incl. min. co-prod.)	***5***	***1***	***~***	***~***	
		Total feature films - 100% nat.	3	1	~	~	
		Total feature films - maj. co-prod.	2	3	~	~	
		Total feature films - min. co-prod.	16	12	~	~	
		Total national feature films	**5**	**4**	**~**	**~**	
		Total feature films (incl. min. co-prod.)	**21**	**16**	**~**	**~**	
LV	b.	Fiction - 100% nat.	2	4	2	2	NFCL
		Fiction - maj. co-prod.	1	0	3	0	
		Fiction - min. co-prod.	0	1	1	2	
		Total national fiction films	***3***	***4***	***5***	***2***	
		Total fiction films (incl. min. co-prod.)	***3***	***5***	***6***	***4***	
		Feature documentaries - 100% nat.	~	~	~	~	
		Feature documentaries - maj. co-prod.	~	~	~	~	
		Feature documentaries - min. co-prod.	~	~	~	~	
		Total national feature documentaries	***~***	***~***	***~***	***~***	
		Total feature docs (incl. min. co-prod.)	***16***	***11***	***10***	***4***	
		Total feature films - 100% nat.	~	~	~	~	
		Total feature films - maj. co-prod.	~	~	~	~	
		Total feature films - min. co-prod.	~	~	~	~	
		Total national feature films	**~**	**~**	**~**	**~**	
		Total feature films (incl. min. co-prod.)	**19**	**16**	**16**	**8**	
ME	a.	Fiction - 100% nat.	1	0	2	0	Min. Cult.
		Fiction - maj. co-prod.	0	3	0	0	
		Fiction - min. co-prod.	0	2	1	0	
		Total national fiction films	***1***	***3***	***2***	***0***	

T.7.1

Number of theatrical feature films produced in Europe

2010-2013 In units. Films: a. completed (answer print) b. released c. granted public support d. certified e. officially recognised f. starting principal photography g. rated.

continued

Country		Film type	2010	2011	2012	2013	Source
(ME)		***Total fiction films (incl. min. co-prod.)***	***1***	***5***	***3***	***0***	
		Feature documentaries - 100% nat.	~	0	2	3	
		Feature documentaries - maj. co-prod.	~	0	0	0	
		Feature documentaries - min. co-prod.	~	1	0	0	
		Total national feature documentaries	***~***	***0***	***2***	***3***	
		Total feature docs (incl. min. co-prod.)	***0***	***1***	***2***	***3***	
		Total feature films - 100% nat.	~	0	4	3	
		Total feature films - maj. co-prod.	~	3	0	0	
		Total feature films - min. co-prod.	~	3	1	0	
		Total national feature films	**~**	**3**	**4**	**3**	
		Total feature films (incl. min. co-prod.)	**~**	**6**	**5**	**3**	
MK	a.	Fiction - 100% nat.	5	9	6	0	MFA
		Fiction - maj. co-prod.	4	1	3	2	
		Fiction - min. co-prod.	3	4	1	0	
		Total national fiction films	***9***	***10***	***9***	***2***	
		Total fiction films (incl. min. co-prod.)	***12***	***14***	***10***	***2***	
		Feature documentaries - 100% nat.	0	0	0	0	
		Feature documentaries - maj. co-prod.	0	0	0	0	
		Feature documentaries - min. co-prod.	0	0	0	1	
		Total national feature documentaries	***0***	***0***	***0***	***0***	
		Total feature docs (incl. min. co-prod.)	***0***	***0***	***0***	***1***	
		Total feature films - 100% nat.	5	9	6	0	
		Total feature films - maj. co-prod.	4	1	3	2	
		Total feature films - min. co-prod.	3	4	1	1	
		Total national feature films	**9**	**10**	**9**	**2**	
		Total feature films (incl. min. co-prod.)	**12**	**14**	**10**	**3**	
MT	a.	Fiction - 100% nat.	0	0	0	2	OBS
		Fiction - maj. co-prod.	0	0	0	0	
		Fiction - min. co-prod.	0	1	1	0	
		Total national fiction films	***0***	***0***	***0***	***2***	
		Total fiction films (incl. min. co-prod.)	***0***	***1***	***1***	***2***	
		Feature documentaries - 100% nat.	0	0	0	0	
		Feature documentaries - maj. co-prod.	0	0	0	0	
		Feature documentaries - min. co-prod.	0	0	0	0	
		Total national feature documentaries	***0***	***0***	***0***	***0***	
		Total feature docs (incl. min. co-prod.)	***0***	***0***	***0***	***0***	
		Total feature films - 100% nat.	0	0	0	2	
		Total feature films - maj. co-prod.	0	0	0	0	
		Total feature films - min. co-prod.	0	1	1	0	
		Total national feature films	**0**	**0**	**0**	**2**	
		Total feature films (incl. min. co-prod.)	**0**	**1**	**1**	**2**	
NL	f.	Fiction - 100% nat.	22	28	26	19	NFF/NVF/OBS
		Fiction - maj. co-prod.	10	11	17	17	
		Fiction - min. co-prod.	15	16	12	13	
		Total national fiction films	***32***	***39***	***43***	***36***	
		Total fiction films (incl. min. co-prod.)	***47***	***55***	***55***	***49***	
	b.	Feature documentaries - 100% nat.	10	17	17	11	
		Feature documentaries - maj. co-prod.	3	3	3	1	
		Feature documentaries - min. co-prod.	2	1	3	4	
		Total national feature documentaries	***13***	***20***	***20***	***12***	
		Total feature docs (incl. min. co-prod.)	***15***	***21***	***23***	***16***	
		Total feature films - 100% nat.	32	45	43	30	
		Total feature films - maj. co-prod.	13	14	20	18	
		Total feature films - min. co-prod.	17	17	15	17	
		Total national feature films	**45**	**59**	**63**	**48**	
		Total feature films (incl. min. co-prod.)	**62**	**76**	**78**	**65**	

1 2 3 4 5 6 7 8

T.7.1

Number of theatrical feature films produced in Europe

2010-2013 In units. Films: a. completed (answer print) b. released c. granted public support d. certified e. officially recognised f. starting principal photography g. rated.

continued

Country		Film type	2010	2011	2012	2013	Source
NO	b.	Fiction - 100% nat.	22	22	16	13	NFI
		Fiction - maj. co-prod.	0	7	7	7	
		Fiction - min. co-prod.	2	3	3	5	
		Total national fiction films	***22***	***29***	***23***	***20***	
		Total fiction films (incl. min. co-prod.)	***24***	***32***	***26***	***25***	
		Feature documentaries - 100% nat.	3	3	6	2	
		Feature documentaries - maj. co-prod.	0	0	0	2	
		Feature documentaries - min. co-prod.	0	0	0	1	
		Total national feature documentaries	***3***	***3***	***6***	***4***	
		Total feature docs (incl. min. co-prod.)	***3***	***3***	***6***	***5***	
		Total feature films - 100% nat.	25	25	22	15	
		Total feature films - maj. co-prod.	0	7	7	9	
		Total feature films - min. co-prod.	2	3	3	6	
		Total national feature films	**25**	**32**	**29**	**24**	
		Total feature films (incl. min. co-prod.)	**27**	**35**	**32**	**30**	
PL	a.	Fiction - 100% nat.	38	24	28	19	PISF
		Fiction - maj. co-prod.	4	3	4	3	
		Fiction - min. co-prod.	2	8	10	3	
		Total national fiction films	***42***	***27***	***32***	***22***	
		Total fiction films (incl. min. co-prod.)	***44***	***35***	***42***	***25***	
		Feature documentaries - 100% nat.	1	5	4	6	
		Feature documentaries - maj. co-prod.	0	1	1	0	
		Feature documentaries - min. co-prod.	1	3	0	0	
		Total national feature documentaries	***1***	***6***	***5***	***6***	
		Total feature docs (incl. min. co-prod.)	***2***	***9***	***5***	***6***	
		Total feature films - 100% nat.	39	29	32	25	
		Total feature films - maj. co-prod.	4	4	5	3	
		Total feature films - min. co-prod.	3	11	10	3	
		Total national feature films	**43**	**33**	**37**	**28**	
		Total feature films (incl. min. co-prod.)	**46**	**44**	**47**	**31**	
PT 5	a.	Fiction - 100% nat.	9	9	3	2	ICA
		Fiction - maj. co-prod.	6	5	4	1	
		Fiction - min. co-prod.	4	5	1	5	
		Total national fiction films	***15***	***14***	***7***	***3***	
		Total fiction films (incl. min. co-prod.)	***19***	***19***	***8***	***8***	
		Feature documentaries - 100% nat.	7	7	5	3	
		Feature documentaries - maj. co-prod.	3	4	2	2	
		Feature documentaries - min. co-prod.	1	0	0	0	
		Total national feature documentaries	***10***	***11***	***7***	***5***	
		Total feature docs (incl. min. co-prod.)	***11***	***11***	***7***	***5***	
		Total feature films - 100% nat.	16	16	8	5	
		Total feature films - maj. co-prod.	9	9	6	3	
		Total feature films - min. co-prod.	5	5	1	5	
		Total national feature films	**25**	**25**	**14**	**8**	
		Total feature films (incl. min. co-prod.)	**30**	**30**	**15**	**13**	
RO	f.	Fiction - 100% nat.	9	9	10	16	CNC
		Fiction - maj. co-prod.	8	2	8	7	
		Fiction - min. co-prod.	2	1	2	3	
		Total national fiction films	***17***	***11***	***18***	***23***	
		Total fiction films (incl. min. co-prod.)	***19***	***12***	***20***	***26***	
		Feature documentaries - 100% nat.	18	12	14	10	
		Feature documentaries - maj. co-prod.	3	2	3	1	
		Feature documentaries - min. co-prod.	0	1	1	0	
		Total national feature documentaries	***21***	***14***	***17***	***11***	
		Total feature docs (incl. min. co-prod.)	***21***	***15***	***18***	***11***	
		Total feature films - 100% nat.	27	21	24	26	

T.7.1

Number of theatrical feature films produced in Europe

2010-2013

In units. Films: a. completed (answer print) b. released c. granted public support d. certified e. officially recognised f. starting principal photography g. rated.

continued

Country		Film type	2010	2011	2012	2013	Source
(RO)		Total feature films - maj. co-prod.	11	4	11	8	
		Total feature films - min. co-prod.	2	2	3	3	
		Total national feature films	**38**	**25**	**35**	**34**	
		Total feature films (incl. min. co-prod.)	**40**	**27**	**38**	**37**	
RU	a.	Fiction - 100% nat.	~	94	88	~	Nevafilm
		Fiction - maj. co-prod.	~	14	19	~	
		Fiction - min. co-prod.	~	1	0	~	
		Total national fiction films	***~***	***108***	***107***	***~***	
		Total fiction films (incl. min. co-prod.)	***~***	***109***	***107***	***~***	
		Feature documentaries - 100% nat.	~	1	2	~	
		Feature documentaries - maj. co-prod.	~	0	0	~	
		Feature documentaries - min. co-prod.	~	1	0	~	
		Total national feature documentaries	***~***	***1***	***2***	***~***	
		Total feature docs (incl. min. co-prod.)	***~***	***2***	***2***	***~***	
		Total feature films - 100% nat.	~	95	90	~	
		Total feature films - maj. co-prod.	~	14	19	~	
		Total feature films - min. co-prod.	~	2	0	~	
		Total national feature films	**~**	**109**	**109**	**~**	
		Total feature films (incl. min. co-prod.)	**~**	**111**	**109**	**~**	
RU	b.	**Total feature films (incl. min. co-prod.)**	**73**	**66**	**73**	**73**	Nevafilm
SE	b.	Fiction - 100% nat.	20	16	27	34	SFI
		Fiction - maj. co-prod.	10	7	3	1	
		Fiction - min. co-prod.	8	5	8	8	
		Total national fiction films	***30***	***23***	***30***	***35***	
		Total fiction films (incl. min. co-prod.)	***38***	***28***	***38***	***43***	
		Feature documentaries - 100% nat.	9	9	7	11	
		Feature documentaries - maj. co-prod.	4	6	5	3	
		Feature documentaries - min. co-prod.	3	0	1	4	
		Total national feature documentaries	***13***	***15***	***12***	***14***	
		Total feature docs (incl. min. co-prod.)	***16***	***15***	***13***	***18***	
		Total feature films - 100% nat.	29	25	34	45	
		Total feature films - maj. co-prod.	14	13	8	4	
		Total feature films - min. co-prod.	11	5	9	12	
		Total national feature films	**43**	**38**	**42**	**49**	
		Total feature films (incl. min. co-prod.)	**54**	**43**	**51**	**61**	
SI 6	b.	Fiction - 100% nat.	4	2	2	9	SFC
		Fiction - maj. co-prod.	0	4	2	1	
		Fiction - min. co-prod.	3	2	4	2	
		Total national fiction films	***4***	***6***	***4***	***10***	
		Total fiction films (incl. min. co-prod.)	***7***	***8***	***8***	***12***	
		Feature documentaries - 100% nat.	0	0	2	3	
		Feature documentaries - maj. co-prod.	0	0	0	1	
		Feature documentaries - min. co-prod.	0	0	0	0	
		Total national feature documentaries	***0***	***0***	***2***	***4***	
		Total feature docs (incl. min. co-prod.)	***0***	***0***	***2***	***4***	
		Total feature films - 100% nat.	4	2	4	12	
		Total feature films - maj. co-prod.	0	4	2	2	
		Total feature films - min. co-prod.	3	2	4	2	
		Total national feature films	**4**	**6**	**6**	**14**	
		Total feature films (incl. min. co-prod.)	**7**	**8**	**10**	**16**	
SK	b.	Fiction - 100% nat.	1	2	7	3	SKFI
		Fiction - maj. co-prod.	1	3	1	4	
		Fiction - min. co-prod.	2	3	0	0	
		Total national fiction films	***2***	***5***	***8***	***7***	

T.7.1

Number of theatrical feature films produced in Europe

2010-2013 In units. Films: a. completed (answer print) b. released c. granted public support d. certified e. officially recognised f. starting principal photography g. rated.

continued

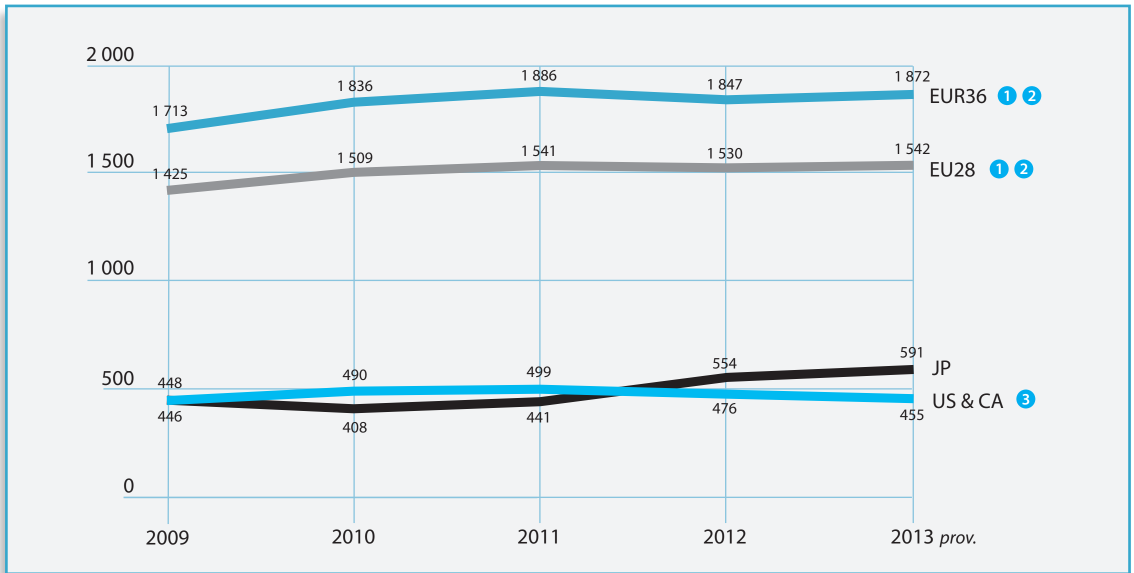
Country		Film type	2010	2011	2012	2013	Source
(SK)		***Total fiction films (incl. min. co-prod.)***	***4***	***8***	***8***	***7***	
		Feature documentaries - 100% nat.	2	3	4	1	
		Feature documentaries - maj. co-prod.	2	1	2	4	
		Feature documentaries - min. co-prod.	0	0	2	1	
		Total national feature documentaries	***4***	***4***	***6***	***5***	
		Total feature docs (incl. min. co-prod.)	***4***	***4***	***8***	***6***	
		Total feature films - 100% nat.	3	5	11	4	
		Total feature films - maj. co-prod.	3	4	3	8	
		Total feature films - min. co-prod.	2	3	2	1	
		Total national feature films	**6**	**9**	**14**	**12**	
		Total feature films (incl. min. co-prod.)	**8**	**12**	**16**	**13**	
TR	a.	Fiction - 100% nat.	~	~	~	~	Antrakt
		Fiction - maj. co-prod.	~	~	~	~	
		Fiction - min. co-prod.	~	~	~	~	
		Total national fiction films	~	~	~	~	
		Total fiction films (incl. min. co-prod.)	***64***	***73***	***72***	***87***	
		Feature documentaries - 100% nat.	~	~	~	~	
		Feature documentaries - maj. co-prod.	~	~	~	~	
		Feature documentaries - min. co-prod.	~	~	~	~	
		Total national feature documentaries	~	~	~	~	
		Total feature docs (incl. min. co-prod.)	***6***	***7***	***5***	***8***	
		Total feature films - 100% nat.	***63***	***71***	***68***	***85***	
		Total feature films - maj. co-prod.	3	7	6	8	
		Total feature films - min. co-prod.	4	2	3	2	
		Total national feature films	**66**	**78**	**74**	**93**	
		Total feature films (incl. min. co-prod.)	**70**	**80**	**77**	**95**	
EUR 28		***Total fiction films*** *est.* [7] [8]	***1 072***	***1 071***	***1 059***	***1 094***	OBS
		Total feature docs *est.* [7] [8]	***437***	***470***	***471***	***448***	OBS
		Total feature films *est.* [7] [8]	***1 509***	***1 541***	***1 530***	***1 542***	OBS
EUR 36		***Total fiction films*** *est.* [7] [8]	***1 325***	***1 327***	***1 302***	***1 349***	OBS
		Total feature docs *est.* [7] [8]	***511***	***559***	***545***	***523***	OBS
		Total feature films *est.* [7] [8]	***1 836***	***1 886***	***1 847***	***1 872***	OBS
US [9]	b.	**Total feature films (incl. min. co-prod.)**	**490**	**499**	**476**	**455**	Nevafilm
JP	b.	**Total feature films (incl. min. co-prod.)**	**408**	**441**	**554**	**591**	EIREN

1. Number of Belgian films represents the sum of films reported by the CFWB and VAF. CFWB counts films certified. VAF counts only feature films released which received public support.
2. Theatrical release year for 100% national and majority co-productions. Year of public funding for minority co-productions.
3. Excluding inward features involving only VFX work in the UK.
4. Production year defined as year of Certificate of Audiovisual Investment. Covers only films eligible for tax credit.
5. Covers only films receiving national public support.
6. 2009 to 2012 data include only data on films receiving national support.
7. Restated pro-forma data series. Difference from data series published up until 2012 primarily results from the UK changing their methodology to include feature films with budgets below GBP 500 000.
8. May double count minority co-produced feature films in CY, GR, HU, LT, MT (EUR 28) and RU, TR (EUR 36). No comprehensive data available on feature documentaries for CY, GR, HU, LT, MT, LV (EUR 28) and IS, RU, TR (EUR 36).
9. Only includes films with a budget above USD 1 million.

➥ European Audiovisual Observatory

G.7.1 Number of feature films produced in EU28, EUR36, Japan and USA & Canada

2009-2013 Includes 100% national films and majority coproductions.
Includes feature documentaries. Minority coproductions excluded.



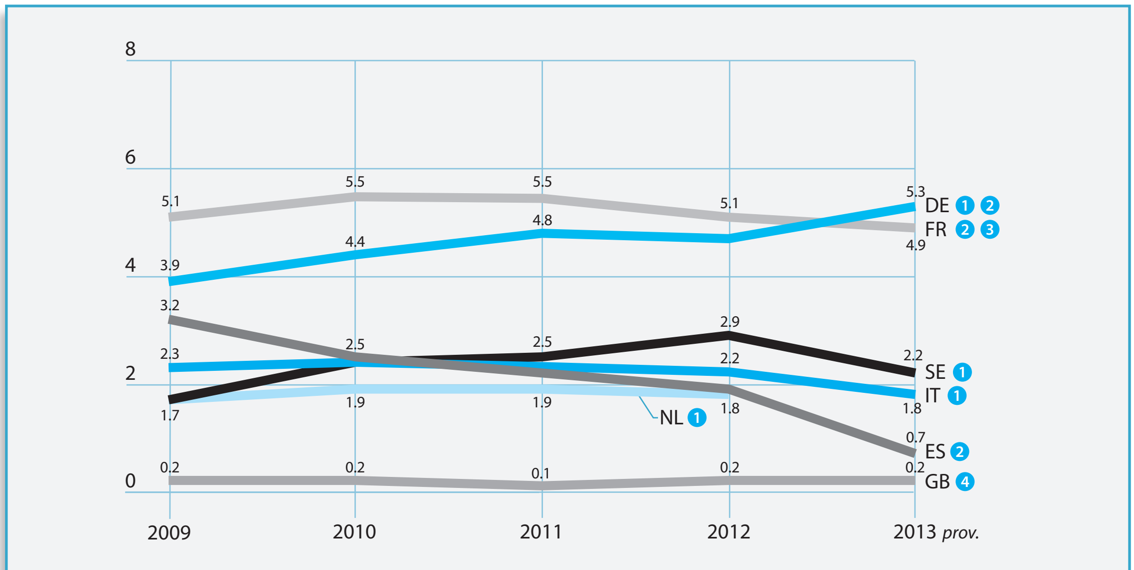
2009-2013 In units.

1. Restated pro-forma data series. Difference from data series published up until 2012 primarily result from the UK changing their methodology to include feature films with budgets below GBP 500 000.
2. May double count minority co-produced feature films in CY, GR, HU, LT, MT (EUR 28) and RU, TR (EUR 36). No comprehensive data available on feature documentaries for CY, GR, HU, LT, MT, LV (EUR 28) and IS, RU, TR (EUR 36).
3. Restated series. Does not include films with budgets under USD 1 million.

European Audiovisual Observatory

G.7.2 Average feature film production budgets

2009-2013 In EUR million.



2009-2013 In EUR million.

1. Fiction films only.
2. Minority co-productions included.
3. French initiative films only.
4. Revised series due to change of methodology: Median (instead of average) UK domestic production budget. Includes films with budgets under GBP 500 000. In 2013 the median budget of inward investment films was EUR 16.1 million while British international (minority and majority) co-productions had a median budget of EUR 2.3 million.

European Audiovisual Observatory

T.7.2

Film production investment in national currency

2009-2013 National currency, in millions.

Country	Currency	2009	2010	2011	2012	prov. 2013	2013/12	Sources
AL		~	~	~	~	~	~	
AT		~	~	~	~	~	~	
BA		~	~	~	~	~	~	
BE [1]	EUR	105.1	177.0	126.8	~	~		SGAM
BG		~	~	~	~	~	~	
CH		~	~	~	~	~	~	
CY		~	~	~	~	~	~	
CZ		~	~	~	~	~	~	
DE [2] [3]	EUR	585.0	523.6	590.4	723.8	816.2	***12.8%***	OBS/SPIO
DK [2] [3]	DKK	554.8	577.4	544.1	679.5	776.8		DFI
EE [2]	EUR	~	~	5.5	1.3	~		EFSA
ES		~	~	~	~	~	~	
FI	EUR	~	~	~	~	~	~	
FR [3] [4]	EUR	1 098.7	1 439.0	1 389.0	1 342.3	1 254.9	***-6.5%***	CNC
GB [3] [5]	GBP	1 115.4	1 289.5	1 321.0	994.3	1 068.6	***7.5%***	BFI
GR		~	~	~	~	~	~	
HR		~	~	~	~	~	~	
HU	HUF	~	~	3 670.0	10 456.0	9 909.2	***-5.2%***	NFO
IE		~	~	~	~	~	~	
IS		~	~	~	~	~	~	
IT [2] [3]	EUR	~	~	423.3	493.1	357.6	***-27.5%***	ANICA
LI		~	~	~	~	~	~	
LT		~	~	~	~	~	~	
LU			~	~	~	~	~	
LV [2]	LVL	~	~	1.5	~	~	~	NFC
ME		~	~	~	~	~	~	
MK		~	~	~	~	~	~	
MT		~	~	~	~	~	~	
NL [2] [3]	EUR	66.6	96.6	96.9	92.0	~	~	NFF
NO		~	~	~	~	~	~	
PL [6]	PLN	~	~	163.4	120.3	~	~	PISF
PT		~	~	~	~	~	~	
RO		~	~	~	~	~	~	
RU [2]	RUB	~	~	6 952.2	4 245.5	~	~	Nevafilm
SE [2] [7]	SEK	395.8	371.4	484.3	581.3	234.8	***-59.6%***	SFI
SI [2] [3]	EUR	~	~	9.1	9.4	~	~	SFC
SK [2] [3]	EUR	19.7	3.9	9.9	~	~		SKFI
TR		~	~	~	~	~	~	

➥ European Audiovisual Observatory

[1] French language community only.
[2] Fiction films only.
[3] Minority co-productions included.
[4] French initiative films only
[5] UK spend only. Restated series. Includes films with budgets under GBP 500k. Includes inward investment films.
[6] Only includes films with PISF support.
[7] Only includes films with SFI support.

T.7.3 Film production investment in Euros

2009-2013 EUR million.

Country	2009	2010	2011	2012	prov. 2013	2013/12
AL	~	~	~	~	~	~
AT	~	~	~	~	~	~
BA	~	~	~	~	~	~
BE [1]	105.1	177.0	126.8	~	~	
BG	~	~	~	~	~	~
CH	~	~	~	~	~	~
CY	~	~	~	~	~	~
CZ	~	~	~	~	~	~
DE [2] [3]	585.0	523.6	590.4	723.8	816.2	*12.8%*
DK [2] [3]	74.5	77.5	73.1	91.3	104.2	*14.1%*
EE [2]	~	~	5.5	1.3		~
ES	~	~	~	~		~
FI	~	~	26.7	26.5		~
FR [3] [4]	1 098.7	1 439.0	1 389.0	1 342.3	1 254.9	*-6.5%*
GB [3] [5]	1 252.3	1 503.0	1 522.5	1 226.3	1 258.5	*2.6%*
GR	~	~	~	~		~
HR	~	~	~	~		~
HU	~	~	13.2	36.3	33.7	*-7.1%*
IE	~	~	~	~		~
IS	~	~	~	~		~
IT [2] [3]	~	~	423.3	493.1	357.6	*-27.5%*
LI	~	~	~	~	~	~
LT	~	~	~	~	~	~
LU	~	~	~	~	~	~
LV [2]	~	~	2.1	~	~	~
ME	~	~	~	~	~	~
MK	~	~	~	~	~	~
MT	~	~	~	~	~	~
NL [2] [3]	66.6	96.6	96.9	92.0	~	~
NO	~	~	~	~	~	~
PL [6]	~	~	39.7	28.7	~	~
PT	~	~	~		~	~
RO	~	~	~		~	~
RU [2]	~	~	167.5	106.4	~	~
SE [2] [7]	35.6	37.9	52.2	66.8	27.1	*-59.4%*
SI [2] [3]	~	~	9.1	9.4	~	~
SK [2] [3]	19.7	3.9	9.9		~	~
TR	~	~	~		~	~

Source: European Audiovisual Observatory

1. French language community only.
2. Fiction films only.
3. Minority co-productions included.
4. French initiative films only.
5. UK spend only. Restated series. Includes films with budgets under GBP 500 000. Includes inward investment films.
6. Only films with PISF support.
7. Only films with SFI support.

T.7.4 Average feature film production budgets in national currency 2009-2013

National currency, in million.

Country	Currency	2009	2010	2011	2012	prov. 2013	2013/12	Sources
AL		~	~	~	~	~	~	
AT		~	~	~	~	~	~	
BA		~	~	~	~	~	~	
BE 1	EUR	4.0	6.3	6.3	~	~	~	SGAM
BG 2	BGN	1.7	1.8	1.9	1.9	~	~	BNFC
CH		~	~	~	~	~	~	
CY		~	~	~	~	~	~	
CZ		~	~	~	~	~	~	
DE 2 3	EUR	3.9	4.4	4.9	4.8	5.3	*10.4%*	SPIO
DK 2	DKK	17.5	18.6	16.8	24.8	20.8	*-16.0%*	DFI
EE 2	EUR	~	~	0.7	0.3	~	~	EFSA
ES 3	EUR	3.2	2.5	2.2	1.9	0.7	*-63.7%*	ICAA
FI 2	EUR	~	~	1.4	1.1	~	~	FFF
FR 3 4	EUR	5.1	5.5	5.5	5.1	4.9	*-4.3%*	CNC
GB 5	GBP	0.2	0.1	0.1	0.1	0.1	*0.0%*	OBS / BFI
GR		~	~	~	~	~	~	
HR		~	~	~	~	~	~	
HU	HUF	~	~	94.1	193.6	150.1	*-22.5%*	NFO
IE		~	~	~	~	~	~	
IS		~	~	~	~	~	~	
IT 2	EUR	2.3	2.4	2.3	2.2	1.8	*-18.5%*	ANICA
LI		~	~	~	~	~	~	
LT		~	~	~	~	~	~	
LU		~	~	~	~	~	~	
LV 2	LVL	~	~	0.6	~	~	~	NFC
ME		~	~	~	~	~	~	
MK		~	~	~	~	~	~	
MT		~	~	~	~	~	~	
NL 2	EUR	1.7	1.9	1.9	1.8	~	~	NFF
NO		~	~	~	~	~	~	
PL 6	PLN	~	~	7.4	6.3	~	~	PISF
PT 2		1.1	0.9	0.8	1.3	0.5	*-60.9%*	ICA
RO		~	~	~	~	~	~	
RU 2	RUB	~	~	92.7	70.8	~	~	Nevafilm
SE 2	SEK	18.0	22.6	23.1	25.3	19.4	*-23.4%*	SFI
SI 2	EUR	~	~	1.3	1.3	~	~	SFC
SK 2	EUR	1.1	1.0	1.1	0.2	~	~	SKFI
TR		~	~	~	~	~	~	

1 French language community only.
2 Fiction films only.
3 Minority co-productions included.
4 French initiative films only.
5 Restated series. Median (instead of average) UK domestic production budget. Includes films with budgets under GBP 500 000. In 2013 the median budget of inward investment films was GBP 13.7 million while British international (minority and majority) co-productions had a median budget of GBP 2.0 million.
6 Only films with PISF support.

➥ European Audiovisual Observatory

T.7.5

Average feature film production budgets in Euros
2009-2013 EUR million.

Country	2009	2010	2011	2012	prov. 2013	2013/12
AL	~	~	~	~	~	~
AT	~	~	~	~	~	~
BA	~	~	~	~	~	~
BE (1)	4.0	6.3	6.3	~	~	~
BG (2)	0.9	0.9	1.0	1.0	~	~
CH	~	~	~	~	~	~
CY	~	~	~	~	~	~
CZ	~	~	~	~	~	~
DE (2) (3)	3.9	4.4	4.9	4.8	5.3	*10.4%*
DK (2)	2.3	2.5	2.3	3.3	2.8	*-16.2%*
EE (2)	~	~	0.7	0.3	~	~
ES (3)	3.2	2.5	2.2	1.9	0.7	*-63.7%*
FI (2)	~	~	1.4	1.1	~	~
FR (3) (4)	5.1	5.5	5.5	5.1	4.9	*-4.3%*
GB (5)	0.2	0.2	0.1	0.2	0.2	*-4.5%*
GR	~	~	~	~	~	~
HR	~	~	~	~	~	~
HU	~	~	0.3	0.7	0.5	*-24.0%*
IE	~	~	~	~		~
IS	~	~	~	~		~
IT (2)	2.3	2.4	2.3	2.2	1.8	*-18.9%*
LI	~	~	~	~	~	~
LT	~	~	~	~	~	~
LU	~	~	~	~	~	~
LV (2)	~	~	0.8	~	~	~
ME	~	~	~	~	~	~
MK	~	~	~	~	~	~
MT	~	~	~	~	~	~
NL (2)	1.7	1.9	1.9	1.8	~	~
NO	~	~	~		~	~
PL (6)	~	~	1.8	1.5	~	~
PT (2)	1.1	0.9	0.8	1.3	0.5	*-60.9%*
RO	~	~	~		~	~
RU (2)	~	~	2.2	1.8	~	~
SE (2)	1.7	2.4	2.5	2.9	2.2	*-23.0%*
SI (2)	~	~	1.3	1.3	~	~
SK (2)	1.1	1.0	1.1	0.2	~	~
TR	~	~	~	~	~	~

(1) French language community only.
(2) Fiction films only.
(3) Minority co-productions included.
(4) French initiative films only.
(5) Restated series. Median (instead of average) UK domestic production budget. Includes films with budgets under GBP 500 000. In 2013 the median budget of inward investment films was EUR 16.1 million while British international (minority and majority) co-productions had a median budget of EUR 2.3 million.
(6) Only films with PISF support.

➥ European Audiovisual Observatory

T.7.6

Number of cinema screens by country

2009-2013 In units.

Country	2009	2010	2011	2012	prov. 2013	2013/12	Sources
AL	~	~	~	~	~		~
AT	577	584	577	565	548	***-3.01%***	FMA
BA	40	40	40	21	~		SFF
BE	510	508	509	500	497	***-0.60%***	INS / MS
BG [1]	102	140	138	140	165	***17.86%***	NFC
CH	559	558	547	536	533	***-0.56%***	OFS
CY [2]	31	31	35	35	38	***8.57%***	MEC / MS
CZ	695	688	668	676	684	***1.18%***	Min.Cult
DE	4 734	4 699	4 640	4 617	4 610	***-0.15%***	FFA
DK	400	399	398	406	406	***0.00%***	DKS
EE [3]	34	34	34	34	34	***0.00%***	EFSA
ES	4 082	4 080	4 044	3 998	3 894	***-2.60%***	ICAA
FI	306	289	283	284	284	***0.00%***	FFF
FR [4]	5 469	5 465	5 464	5 508	5 587	***1.43%***	CNC
GB	3 651	3 671	3 767	3 817	3 867	***1.31%***	BFI
GR [5]	500	486	493	470	482	***2.55%***	MS (09-10) / MDH
HR [6]	117	118	156	162	153	***-5.56%***	CBS
HU	417	395	395	360	345	***-4.17%***	NFO
IE	450	449	480	438	465	***6.16%***	CSA
IS	40	38	41	41	~		HI
IT [7]	3 879	3 803	3 813	3 808	~		MS / SIAE
LI	2	2	~	~	~		MS / OFS / OBS
LT	84	81	84	84	84	***0.00%***	LS
LU	33	33	33	34	34	***0.00%***	MS
LV	55	63	63	62	66	***6.45%***	NFC
ME	~	~	~	~	~		~
MK [8]	18	20	23	~	~		SSO / OBS
MT	38	37	37	~	36		MS/OBS
NL [9]	751	777	789	806	756	***-6.20%***	NVB/NFC/NFF
NO	422	429	422	415	422	***1.69%***	F&K
PL	1 061	1 076	1 122	1 162	1 259	***8.35%***	CSO
PT	577	564	558	551	545	***-1.09%***	ICA
RO	182	194	241	264	264	***0.00%***	CNC
RU [4]	2 101	2 395	2 704	3 100	3 479	***12.23%***	Nevafilm
SE	848	831	830	816	774	***-5.15%***	SFI
SI	103	106	111	110	112	***1.82%***	SFC
SK [4]	238	227	209	206	168	***-18.45%***	SKFI/AIC
TR [10]	1 874	1 968	2 093	2 093	2 243	***7.17%***	ANTRAKT
EUR 28 *est.* [10]	**29 924**	**29 828**	**29 971**	**29 950**	**29 965**	***0.05%***	OBS
EUR 36 *est.* [10]	**34 980**	**35 278**	**35 843**	**36 181**	**36 729**	***1.51%***	OBS
US [11]	39 233	39 547	39 580	39 662	39 783	***0.31%***	MPAA
JP	3 396	3 412	3 339	3 290	3 318	***0.85%***	EIREN

1. Active screens, not registered screens.
2. Only screens in commercial cinemas operating regularly with an offer addressing all types of audiences.
3. Restated data series covering only full time commercial cinemas with regular programming. In addition there are about 40 screening places with one screen operated part-time by local municipalities and usually based in cultural centres.
4. Restated data series.
5. Restated data series. Estimated data.
6. Including open-air screens.
7. Includes only screens with more than 60 days of activity per year.
8. OBS estimates based on SSO data on cinemas.
9. Including small municipal cinemas without weekly programming. Excluding open-air cinemas.
10. Restated data series.
11. Including outdoor cinemas and video theatres. Excluding IMAX screens.

European Audiovisual Observatory

T.7.7

Inhabitants per screen

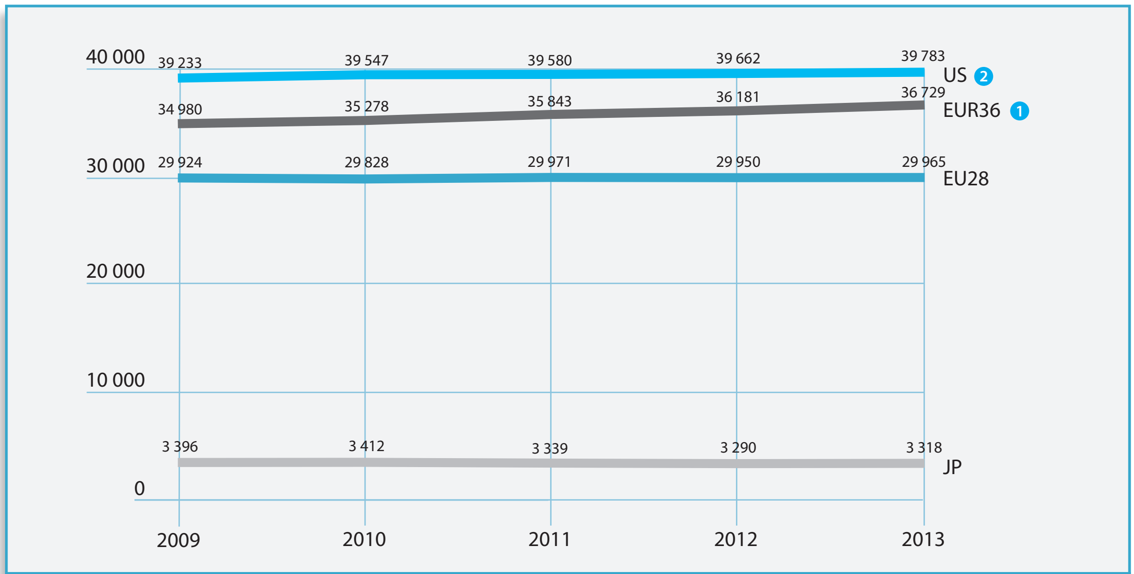
2009-2013 In persons.

Country	2009	2010	2011	2012	prov. 2013	2013/12
AL	~	~	~	~	~	~
AT	14 481	14 341	14 565	14 882	15 423	3.6%
BA	96 100	96 101	96 080	182 822	~	~
BE	21 084	21 338	21 612	22 190	22 458	1.2%
BG (1)	73 207	53 013	53 402	52 337	44 149	-15.6%
CH	13 778	13 953	14 388	14 841	15 083	1.6%
CY (2)	25 707	26 424	23 993	24 629	22 786	-7.5%
CZ	15 001	15 207	15 699	15 541	15 374	-1.1%
DE	17 322	17 408	17 619	17 398	17 467	0.4%
DK	13 779	13 872	13 971	13 745	13 800	0.4%
EE (3)	39 392	39 343	39 297	39 229	38 965	-0.7%
ES	11 328	11 394	11 540	11 710	11 994	2.4%
FI	17 406	18 517	18 994	19 019	19 108	0.5%
FR (4)	11 766	11 831	11 895	11 861	11 747	-1.0%
GB	16 993	17 028	16 730	16 635	16 523	-0.7%
GR (5)	22 381	23 011	22 563	23 666	22 951	-3.0%
HR (6)	36 836	36 465	27 499	26 395	27 857	5.5%
HU	24 055	25 353	25 280	27 589	28 721	4.1%
IE	9 889	10 132	9 523	10 463	9 873	-5.6%
IS	7 984	8 359	7 767	7 795	~	~
IT (7)	15 480	15 867	15 900	15 597	~	~
LI	17 795	17 947	18 075	18 238	18 419	1.0%
LT	37 903	38 790	36 340	35 758	35 380	-1.1%
LU	14 955	15 214	15 510	15 437	15 795	2.3%
LV	39 324	33 659	32 930	32 981	30 664	-7.0%
ME	~	~	~	~	~	~
MK (8)	113 812	102 636	89 447	~	~	~
MT	10 814	11 190	11 216	~	11 705	~
NL (9)	21 952	21 332	21 110	20 757	22 195	6.9%
NO	11 373	11 324	11 659	12 014	11 970	-0.4%
PL	35 943	35 471	34 340	33 166	30 606	-7.7%
PT	18 307	18 747	18 948	19 133	19 243	0.6%
RO	112 309	104 612	83 814	76 121	75 834	-0.4%
RU (4)	67 920	59 666	52 848	46 129	41 190	-10.7%
SE	10 916	11 240	11 344	11 621	12 346	6.2%
SI	19 732	19 311	18 470	18 686	18 382	-1.6%
SK (4)	22 615	23 746	25 801	26 235	32 207	22.8%
TR (10)	38 163	36 871	35 224	35 702	33 717	-5.6%
EUR 28 *est.* (10)	16 815	16 916	16 892	16 849	16 876	0.2%
EUR 36 *est.* (10)	21 045	20 945	20 700	20 496	20 256	-1.2%
US (11)	7 835	7 839	7 912	7 874	7 956	1.0%
JP	37 559	37 396	38 311	38 787	38 379	-1.1%

(1) Active screens, not registered screens.
(2) Only screens in commercial cinemas operating regularly with an offer addressing all types of audiences.
(3) Restated data series covering only full time commercial cinemas with regular programming. In addition there are about 40 screening places with one screen operated part-time by local municipalities and usually based in cultural centres.
(4) Restated data series.
(5) Restated data series. Estimated data.
(6) Including open-air screens.
(7) Includes only screens with more than 60 days of activity per year.
(8) OBS estimates based on SSO data on cinemas.
(9) Including small municipal cinemas without weekly programming. Excluding open-air cinemas.
(10) Restated data series.
(11) Including outdoor cinemas and video theatres. Excluding IMAX screens.

➡ European Audiovisual Observatory

G.7.3 Number of screens in Europe, USA and Japan 2009-2013

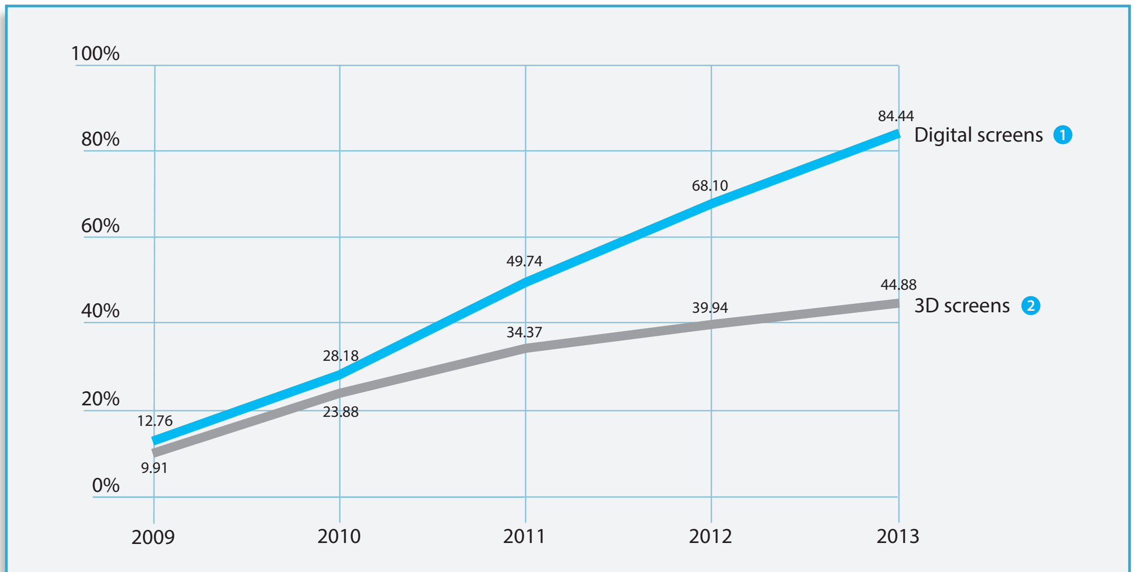


2009-2013 In units.

1. EUR 36 is EUR38 minus Albania and Montenegro.
2. Including outdoor cinemas and video theatres. Excluding IMAX screens.

European Audiovisual Observatory

G.7.4 Digital and 3D screens 2009-2013 As a percentage of total screens in Europe.



2009-2013 In %.

1. For EUR 34 (EUR 38 minus Albania, Liechtenstein, Montenegro and "The former Yugoslav Republic of Macedonia").
2. For EUR 33 (EUR 38 minus Albania, Bosnia and Herzegovina, Liechtenstein, Montenegro and "The former Yugoslav Republic of Macedonia").

European Audiovisual Observatory

T.7.8 Number of cinema sites by country

2009-2013 In units.

Country	2009	2010	2011	2012	prov. 2013	2013/12	Sources
AL	~	~	~	~	~	~	~
AT	160	160	160	152	133	-12.5%	FMA
BA	~	~	30	~	~	~	SFF
BE	108	107	108	103	99	-3.9%	MS
BG (1)	26	33	30	29	32	10.3%	NFC
CH	302	299	288	278	272	-2.2%	OFS
CY (2)	7	7	6	6	8	33.3%	MEC / MS
CZ	516	501	473	472	474	0.4%	Min.Cult
DE	1 744	1 714	1 671	1 652	1 637	-0.9%	FFA
DK	163	161	161	163	163	0.0%	DKS
EE (3)	9	9	9	9	8	-11.1%	EFSA
ES	851	860	876	838	756	-9.8%	ICAA
FI	179	172	172	162	160	-1.2%	FFF
FR (4)	2 065	2 047	2 030	2 035	2 058	1.1%	CNC
GB	723	716	745	769	756	-1.7%	BFI, MS (13)
GR (5)	265	260	297	~	~	~	MS (07-10) / MDH
HR (6)	75	72	78	77	62	-19.5%	MS/CBS
HU (4)	180	173	173	140	125	-10.7%	NFO
IE	71	71	78	70	69	-1.4%	MediaLive / Entertainment.ie / IFB
IS	17	16	15	15	15	0.0%	HI/ MS
IT	1 794	1 689	1 621	1 631	~	~	FEDS / MS
LI	2	2	2	2	2	0.0%	MS
LT	42	32	33	32	32	0.0%	LS
LU	13	13	13	14	14	0.0%	MS
LV	17	17	17	17	32	88.2%	NFC
ME	~	~	~	14	~	~	SSO
MK	10	11	13	~	~	~	SSO
MT	7	6	~	7	6	-14.3%	MS / OBS
NL (7)	225	237	239	256	248	-3.1%	NVB / NFC / NFF, MS (13)
NO	212	209	198	196	200	2.0%	F&K
PL	455	443	455	463	516	11.4%	CSO
PT	174	167	165	160	155	-3.1%	ICA
RO	74	68	75	81	76	-6.2%	CNC
RU (4)	778	834	914	1 025	1 101	7.4%	Nevafilm
SE	502	489	479	463	424	-8.4%	SFI
SI	48	49	52	54	55	1.9%	SFC
SK (4)	181	162	143	129	95	-26.4%	SKFI / AIC
TR (8)	491	520	567	604	620	2.6%	ANTRAKT
EUR 27 *est.*	10 599	10 363	10 283	10 238	10 059	-1.7%	OBS
EUR 36 *est.*	12 516	12 356	12 389	12 463	12 374	-0.7%	OBS
US (9)	5 942	5 773	5 697	5 683	~		NATO
JP	~	~	~	~	~		~

(1) Registered and working cinemas. Registration mandatory according to Film Industry Act 2004.
(2) Only commercial cinemas operating regularly with an offer addressing all types of audiences.
(3) Restated data series covering only full time commercial cinemas with regular programming. In addition there are about 40 screening places with one screen operated part-time by local municipalities and usually based in cultural centres.
(4) Restated data series.
(5) Restated data series.
(6) Including open-air cinemas.
(7) Including small municipal cinemas without weekly programming. Excluding open-air cinemas.
(8) Revised data series.
(9) Includes drive-ins.

➥ European Audiovisual Observatory

T.7.9 Number of digital screens by country

2009-2013 In units.

Country	2009	2010	2011	2012	*prov.* 2013	*2013/12*	Sources
AL	~	~	~	~	~	~	MS
AT	239	306	393	444	537	***20.9%***	MS
BA	1	3	~	12	~	~	SFF
BE	144	334	427	480	491	***2.3%***	MS
BG	23	57	77	101	163	***61.4%***	MS
CH	60	133	315	493	521	***5.7%***	MS
CY	6	15	18	21	38	***81.0%***	MS
CZ	50	133	299	383	430	***12.3%***	MS
DE	566	1248	2011	3 134	4 170	***33.1%***	MS
DK	25	136	286	392	400	***2.0%***	MS
EE	5	14	18	18	29	***61.1%***	MS
ES	252	758	1545	1 800	2 720	***51.1%***	MS
FI	48	88	180	250	284	***13.6%***	MS
FR	904	1887	3656	5 150	5 565	***8.1%***	MS
GB	667	1408	2724	3544	3 860	***8.9%***	MS
GR	31	59	75	81	120	***48.1%***	MS
HR	8	9	90	100	130	***30.0%***	MS
HU	31	56	159	250	288	***15.2%***	MS
IE	112	142	192	289	465	***60.9%***	MS
IS	12	17	30	33	38	***15.2%***	HI
IT	434	912	1519	2 112	2 850	***34.9%***	MS
LI	~	~	~	~	2	~	MS
LT	5	13	18	21	52	***147.6%***	MS
LU	22	24	33	34	34	***0.0%***	MS
LV	3	11	16	28	36	***28.6%***	MS
ME	~	~	~	~	~	~	MS
MK	~	~	~	~	~	~	MS
MT	2	6	6	22	30	***36.4%***	MS
NL	105	252	540	806	756	***-6.2%***	MS
NO	61	268	422	415	422	***1.7%***	MS
PL	177	324	592	827	972	***17.5%***	MS
PT	181	317	387	392	425	***8.4%***	MS
RO	40	61	111	136	226	***66.2%***	MS
RU	351	941	1485	2 098	2 967	***41.4%***	MS
SE	38	155	272	640	707	***10.5%***	MS
SI	9	16	17	18	50	***177.8%***	MS
SK	10	35	75	113	133	***17.7%***	MS
TR	62	205	266	360	1 073	***198.1%***	MS
EUR 28 *est.*	**4 145**	**8 785**	**15 826**	**21 686**	**26 091**	***20.3%***	OBS
EUR 34 *est.*	**4 684**	**10 343**	**18 257**	**24 997**	**30 994**	***24.0%***	OBS
US	7 418	14 735	25 621	33 129	36 802	***11.1%***	MPAA
JP	440	983	2 000	2 897	3 172	***9.5%***	OBS

➥ European Audiovisual Observatory

T.7.10

Digital screens as a percentage of total screens
2009-2013 In %.

Country	2009	2010	2011	2012	*prov.* 2013	*2013/12*	Sources
AL	~	~	~	~	~	~	MS
AT	41.4	52.4	68.1	78.6	98.0	***24.7%***	MS
BA	2.5	7.5	~	57.1	~	~	SFF
BE	28.2	65.7	83.9	96.0	98.8	***2.9%***	MS
BG	22.5	40.7	55.8	72.1	98.8	***36.9%***	MS
CH	10.7	23.8	57.6	92.0	97.7	***6.3%***	MS
CY	19.4	48.4	51.4	60.0	100.0	***66.7%***	MS
CZ	7.2	19.3	44.8	56.7	62.9	***11.0%***	MS
DE	12.0	26.6	43.3	67.9	90.5	***33.3%***	MS
DK	6.3	34.1	71.9	96.6	98.5	***2.0%***	MS
EE	14.7	41.2	52.9	52.9	85.3	***61.1%***	MS
ES	6.2	18.6	38.2	45.0	69.9	***55.1%***	MS
FI	15.7	30.4	63.6	88.0	100.0	***13.6%***	MS
FR	16.5	34.5	66.9	93.5	99.6	***6.5%***	MS
GB	18.3	38.4	72.3	92.8	99.8	***7.5%***	MS
GR	6.2	12.1	15.2	17.2	24.9	***44.5%***	MS
HR	6.8	7.6	57.7	61.7	85.0	***37.6%***	MS
HU	7.4	14.2	40.3	69.4	83.5	***20.2%***	MS
IE	24.9	31.6	40.0	66.0	100.0	***51.6%***	MS
IS	30.0	44.7	73.2	80.5	~	~	HI
IT	11.2	24.0	39.8	55.5	~	~	MS
LI	~	~	~	~	~	~	MS
LT	6.0	16.0	21.4	25.0	61.9	***16.7%***	MS
LU	66.7	72.7	100.0	100.0	100.0	***0.0%***	MS
LV	5.5	17.5	25.4	45.2	54.5	***77.8%***	MS
ME	~	~	~	~	~	~	MS
MK	~	~	~	~	~	~	MS
MT	5.3	16.2	16.2		83.3	~	MS
NL	14.0	32.4	68.4	100.0	100.0	***46.1%***	MS
NO	14.5	62.5	100.0	100.0	100.0	***0.0%***	MS
PL	16.7	30.1	52.8	71.2	77.2	***34.9%***	MS
PT	31.4	56.2	69.4	71.1	78.0	***2.6%***	MS
RO	22.0	31.4	46.1	51.5	85.6	***11.8%***	MS
RU	16.7	39.3	54.9	67.7	85.3	***23.2%***	MS
SE	4.5	18.7	32.8	78.4	91.3	***139.3%***	MS
SI	8.7	15.1	15.3	16.4	44.6	***6.8%***	MS
SK	4.2	15.4	35.9	54.9	79.2	***52.9%***	MS
TR	3.3	10.4	12.7	17.2	47.8	***35.3%***	MS
EUR 28 *est.*	**13.9**	**29.5**	**52.8**	**72.4**	**87.1**	***20.3%***	OBS
EUR 34 *est.*	**12.8**	**28.2**	**49.7**	**68.1**	**84.4**	***24.0%***	OBS
US & CA	18.6	37.0	64.4	83.3	92.5	***11.1%***	MPAA
JP	13.3	29.6	60.3	87.3	95.6	***9.5%***	EIREN

➥ European Audiovisual Observatory

T.7.11 Number of digital 3D screens by country

2009-2013 In units.

Country	2009	2010	2011	2012	prov. 2013	2013/12	Sources
AL	~	~	~	~	~	~	
AT	101	208	240	286	316	10.5%	MS
BA	~	~	~	~	~	~	
BE	45	102	140	146	151	3.4%	MS
BG	12	53	61	84	109	29.8%	MS
CH	53	129	216	247	271	9.7%	MS
CY	6	6	14	16	16	0.0%	MS
CZ	47	121	164	211	238	12.8%	MS
DE	422	1 114	1 547	1 686	1 985	17.7%	MS
DK	23	130	206	234	243	3.8%	MS
EE	2	12	13	13	20	53.8%	MS
ES	215	604	878	960	1 030	7.3%	MS
FI	43	79	137	155	208	34.2%	MS
FR	627	1 387	2 372	2 851	2 970	4.2%	MS
GB	474	1 096	1 480	1 575	2 021	28.3%	MS
GR	21	54	65	77	90	16.9%	MS
HR	8	9	51	62	80	29.0%	MS
HU	28	55	83	108	175	62.0%	MS
IE	68	96	127	150	230	53.3%	MS
IS	7	14	21	26	27	3.8%	MS
IT	400	842	1030	1 131	1 195	5.7%	MS
LI	~	~	~	~	~	~	
LT	5	13	18	18	25	38.9%	MS
LU	15	16	23	24	24	0.0%	MS
LV	3	10	15	15	20	33.3%	MS
ME	~	~	~	~	~	~	~
MK	~	~	~	~	~	~	~
MT	2	5	6	7	13	85.7%	MS
NL	94	231	346	394	421	6.9%	MS
NO	28	151	258	273	268	-1.8%	MS
PL	142	310	491	607	660	8.7%	MS
PT	89	176	214	214	226	5.6%	MS
RO	25	54	82	99	117	18.2%	MS
RU	345	937	1 447	1 966	2 327	18.4%	MS
SE	33	146	248	424	434	2.4%	MS
SI	9	16	16	17	35	105.9%	MS
SK	10	32	57	75	84	12.0%	MS
TR	59	202	230	280	433	54.6%	MS
EUR 28 *est.*	2 961	6 968	10 073	11 639	13 136	12.9%	OBS
EUR 33 *est.*	3 461	8 410	12 296	14 431	16 462	14.1%	OBS
US	3 269	7 837	12 620	13 559	14 483	6.8%	MPAA
JP	170	763	970	1 042	1 077	3.4%	EIREN

➡ MEDIA Salles / European Audiovisual Observatory

T.7.12 3D screens as a percentage of total screens 2009-2013 In %.

Country	2009	2010	2011	2012	prov. 2013	*2013/12*	Sources
AL	~	~	~	~	~	~	
AT	17.5	35.6	41.6	50.6	57.7	***13.9%***	MS/OBS
BA	~	~	~	~	~	~	
BE	8.8	20.1	27.5	29.2	30.4	***4.0%***	MS/OBS
BG	11.8	37.9	44.2	60.0	66.1	***10.1%***	MS/OBS
CH	9.5	23.1	39.5	46.1	50.8	***10.3%***	MS/OBS
CY	19.4	19.4	40.0	45.7	42.1	***-7.9%***	MS/OBS
CZ	6.8	17.6	24.6	31.2	34.8	***11.5%***	MS/OBS
DE	8.9	23.7	33.3	36.5	43.1	***17.9%***	MS/OBS
DK	5.8	32.8	52.0	57.6	59.9	***3.8%***	MS/OBS
EE	5.9	35.3	38.2	38.2	58.8	***53.8%***	MS/OBS
ES	5.3	14.8	21.7	24.0	26.5	***10.2%***	MS/OBS
FI	14.1	27.3	48.4	54.6	73.2	***34.2%***	MS/OBS
FR	11.5	25.4	43.4	51.8	53.2	***2.7%***	MS/OBS
GB	13.0	29.9	39.3	41.3	52.3	***26.7%***	MS/OBS
GR	4.2	11.1	13.2	16.4	18.7	***14.0%***	MS/OBS
HR	7.5	7.6	32.7	38.3	52.3	***36.6%***	MS/OBS
HU	6.7	13.9	21.0	30.0	50.7	***69.1%***	MS/OBS
IE	15.1	21.4	26.5	34.2	49.5	***44.4%***	MS/OBS
IS	17.1	32.6	48.8	63.4	~	~	MS/OBS
IT	10.3	22.1	27.0	29.7	~	~	MS/OBS
LI	~	~	~	~	~	~	
LT	6.0	16.0	21.4	21.4	29.8	***38.9%***	MS/OBS
LU	45.5	48.5	69.7	70.6	70.6	***0.0%***	MS/OBS
LV	5.5	15.9	23.8	24.2	30.3	***25.3%***	MS/OBS
ME	~	~	~	~	~	~	
MK	~	~	~	~	~	~	
MT	5.3	13.5	~	~	36.1	~	MS/OBS
NL	12.5	29.7	43.9	48.9	55.7	***13.9%***	MS/OBS
NO	6.6	35.2	60.7	65.8	63.5	***-3.5%***	MS/OBS
PL	13.4	28.8	43.8	50.6	52.4	***3.6%***	MS/OBS
PT	15.4	31.2	38.4	38.8	41.5	***6.8%***	MS/OBS
RO	13.7	27.8	34.0	37.5	44.3	***18.2%***	MS/OBS
RU	16.2	38.7	53.1	63.4	66.9	***5.5%***	MS/OBS
SE	3.9	17.6	29.9	52.0	56.1	***7.9%***	MS/OBS
SI	8.7	15.1	14.4	15.5	31.3	***102.2%***	MS/OBS
SK	4.2	14.1	27.3	36.4	50.0	***37.3%***	MS/OBS
TR	3.1	10.3	11.0	13.4	19.3	***44.3%***	MS/OBS
EUR 28 *est.*	**9.9**	**23.4**	**33.6**	**38.8**	**43.8**	***12.9%***	OBS
EUR 33 *est.*	**9.9**	**23.9**	**34.4**	**39.9**	**44.9**	***12.4%***	OBS
US & CA	8.3	19.8	31.8	34.0	36.4	***7.2%***	MPAA
JP	5.0	22.4	29.1	31.7	32.5	***2.5%***	EIREN

➥ European Audiovisual Observatory

T.7.13 3D screens as a percentage of digital screens 2009-2013 In %.

Country	2009	2010	2011	2012	prov. 2013	2013/12	Sources
AL	~	~	~	~	~	~	
AT	42.3	68.0	61.1	64.4	58.8	-8.6%	MS/OBS
BA	~	~	~	~	~	~	
BE	31.3	30.5	32.8	30.4	30.8	1.1%	MS/OBS
BG	52.2	93.0	79.2	83.2	66.9	-19.6%	MS/OBS
CH	88.3	97.0	68.6	50.1	52.0	3.8%	MS/OBS
CY	100.0	40.0	77.8	76.2	42.1	-44.7%	MS/OBS
CZ	94.0	91.0	54.8	55.1	55.3	0.5%	MS/OBS
DE	74.6	89.3	76.9	53.8	47.6	-11.5%	MS/OBS
DK	92.0	95.6	72.0	59.7	60.8	1.8%	MS/OBS
EE	40.0	85.7	72.2	72.2	69.0	-4.5%	MS/OBS
ES	85.3	79.7	56.8	53.3	37.9	-29.0%	MS/OBS
FI	89.6	89.8	76.1	86.1	73.2	-14.9%	MS/OBS
FR	69.4	73.5	64.9	55.4	53.4	-3.6%	MS/OBS
GB	71.1	77.8	54.3	44.4	52.4	17.8%	MS/OBS
GR	67.7	91.5	86.7	95.1	75.0	-21.1%	MS/OBS
HR	100.0	100.0	56.7	62.0	61.5	-0.7%	MS/OBS
HU	90.3	98.2	52.2	43.2	60.8	40.7%	MS/OBS
IE	60.7	67.6	66.1	51.9	49.5	-4.7%	MS/OBS
IS	100.0	100.0	75.0	78.8	71.1	-9.8%	MS/OBS
IT	92.2	92.3	67.8	53.6	41.9	-21.7%	MS/OBS
LI	~	~	~	~	~	~	
LT	100.0	100.0	100.0	85.7	48.1	-43.9%	MS/OBS
LU	68.2	66.7	69.7	70.6	70.6	0.0%	MS/OBS
LV	100.0	90.9	93.8	53.6	55.6	3.7%	MS/OBS
ME	~	~	~	~	~	~	
MK	~	~	~	~	~	~	
MT	100.0	83.3	100.0	31.8	43.3	36.2%	MS/OBS
NL	89.5	91.7	64.1	73.0	55.7	-23.7%	MS/OBS
NO	45.9	56.3	60.7	65.8	63.5	-3.5%	MS/OBS
PL	80.2	95.7	82.9	73.4	67.9	-7.5%	MS/OBS
PT	49.2	55.5	55.3	54.6	53.2	-2.6%	MS/OBS
RO	62.5	88.5	73.9	72.8	51.8	-28.9%	MS/OBS
RU	98.3	99.6	97.4	93.7	78.4	-16.3%	MS/OBS
SE	86.8	94.2	91.2	66.3	61.4	-7.3%	MS/OBS
SI	100.0	100.0	94.1	94.4	70.0	-25.9%	MS/OBS
SK	100.0	91.4	76.0	66.4	63.2	-4.8%	MS/OBS
TR	95.2	98.5	86.5	77.8	40.4	-48.1%	MS/OBS
EU 27 est.	71.7	79.5	64.4	53.7	50.3	-6.2%	OBS
EUR 33 est.	74.0	81.3	67.3	57.8	53.1	-8.0%	OBS
US & CA	44.1	53.2	50.0	40.9	39.4	-3.8%	MPAA/OBS
JP	38.6	77.6	48.5	36.0	34.0	-5.6%	EIREN/OBS

➥ European Audiovisual Observatory

T.7.14

Cinema admissions

2009-2013 In millions.

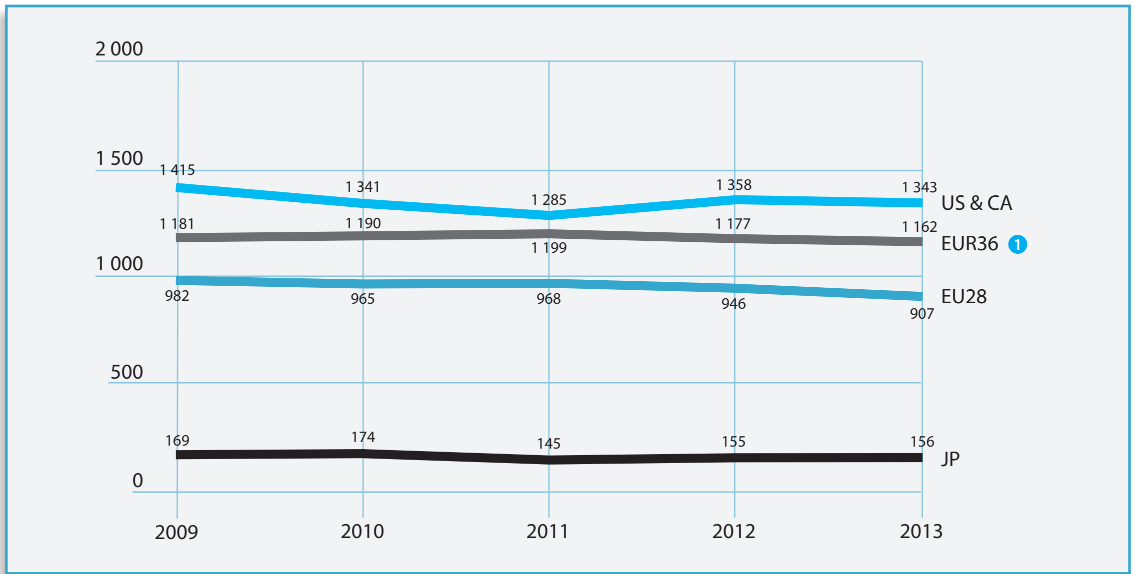
Country	2009	2010	2011	prov. 2012	prov. 2013	2013/12	Sources
AL	~	~	~	~	~	~	~
AT	18.07	16.45	15.75	16.40	15.18	-7.5%	ÖFI
BA	0.45	0.72	0.47	0.65		~	SFF
BE [1]	21.34	21.31	22.80	21.85	20.90	-4.3%	FCB/CCA-FWB
BG [2]	3.18	3.98	4.72	4.11	4.79	16.7%	NFC
CH	15.25	14.76	14.90	15.53	13.70	-11.8%	OFS
CY	0.87	0.85	0.87	0.84	0.63	-24.4%	MEC/MS (2010)
CZ	12.47	13.54	10.79	11.18	11.06	-1.1%	Min.Cult./ UFD
DE	146.35	126.61	129.58	135.06	129.67	-4.0%	FFA
DK	14.08	12.95	12.43	13.59	13.56	-0.2%	DKS
EE	1.78	2.13	2.47	2.59	2.56	-1.1%	EFSA
ES	109.99	101.59	98.34	93.59	78.20	-16.4%	ICAA
FI	6.84	7.56	7.14	8.38	7.80	-6.9%	FFF
FR	201.51	206.95	217.06	203.56	193.59	-4.9%	CNC
GB	173.46	169.25	171.56	172.50	165.54	-4.0%	CAA/BFI
GR	12.29	11.71	10.84	10.12	9.21	-9.0%	MS (09, 12)/MDH
HR	3.52	3.36	3.56	4.06	4.00	-1.6%	CBS
HU	10.60	10.98	9.80	9.50	10.15	6.8%	NFO
IE	17.65	16.49	16.35	15.43	14.66	-5.0%	IFB/ CSA (2011)
IS	1.65	1.50	1.49	1.45	1.40	-3.2%	HI
IT [2]	109.23	120.58	112.12	100.15	106.71	6.6%	ANICA/SIAE
LI	0.023	0.02	~	~	~	~	MS/OFS
LT	2.70	2.62	3.05	3.02	3.26	7.8%	SL
LU	1.29	1.21	1.28	1.26	1.21	-3.4%	MS/CNA (09)
LV	1.94	2.11	2.06	2.29	2.38	4.0%	NFC
ME	~	~	~	~	~	~	
MK [2]	0.11	0.10	0.09	0.20	~	~	MFF
MT	0.89	0.89	0.78	0.73	0.68	-6.9%	MS/NSO
NL	27.30	28.19	30.43	30.56	30.82	0.8%	MaccsBox - NVB & NVF
NO	12.70	11.02	11.66	12.12	11.80	-2.7%	F&K
PL	39.19	37.49	38.72	38.48	36.31	-5.6%	boxoffice.pl
PT	15.70	16.55	15.70	13.81	12.55	-9.2%	ICA
RO	5.28	6.51	7.24	8.35	9.05	8.4%	CNC
RU [3]	132.34	155.92	159.50	157.00	177.13	12.8%	Nevafilm/RFB/OBS
SE	17.40	15.82	16.53	17.94	16.59	-7.5%	SFI
SI	2.66	2.89	2.91	2.74	2.34	-14.8%	SFC
SK	4.15	3.91	3.60	3.44	3.73	8.4%	SKFI/AIC
TR	36.90	41.06	42.40	43.90	50.41	14.8%	ANTRAKT
EU 28 *est.*	981.71	964.48	968.49	945.52	907.12	-4.1%	OBS
EUR 37 *est.* [4]	1 181.13	1 189.60	1 199.22	1 176.57	1 162.26	-1.2%	OBS
US & CA	1 415.24	1 340.98	1 284.65	1 358.14	1 343.14	-1.1%	MPAA
JP	169.30	174.36	144.73	155.16	155.89	0.5%	EIREN

➥ European Audiovisual Observatory

1. Restated data series based on figures from FCB and CCA-FWB.
2. Restated time series.
3. Revised data series. The 2012 figure refers to Russia only, not to the CIS (excluding Ukraine) as in previous years . As of 2011 data are calculated for the calendar year; previous data refer to the distribution year (from 1st December to 30th November).
4. EUR 37 = EUR 38 minus AL.

G.7.5 Cinema admissions in Europe, North America and Japan

2009-2013 In millions of admissions.



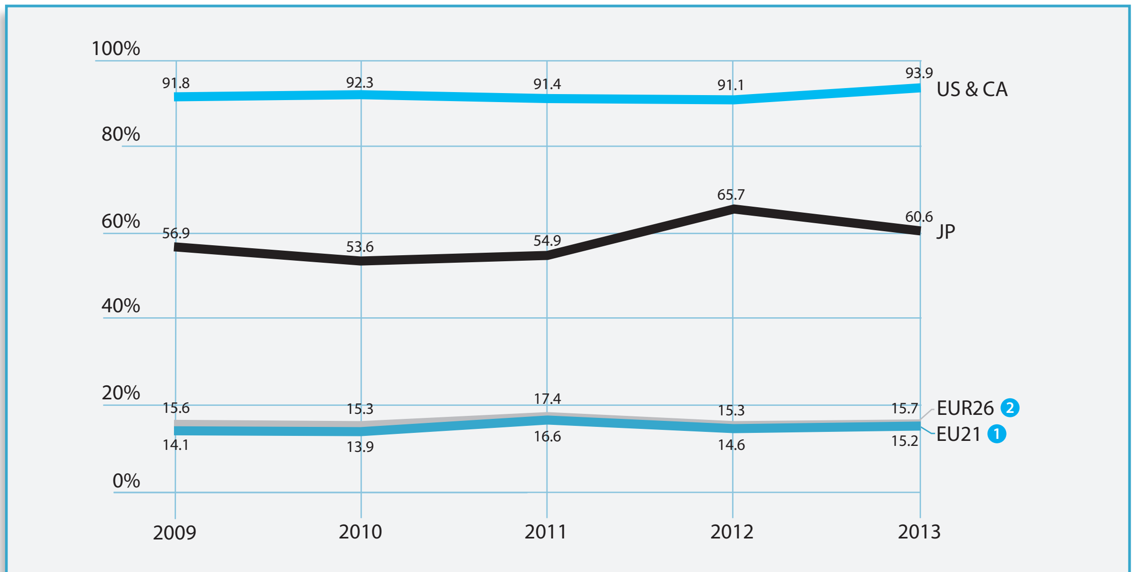
2009-2013 In millions.

1 EUR 38 minus Albania and Montenegro.

European Audiovisual Observatory

G.7.6 National market share in Europe, North America and Japan

2009-2013 Percentage of total cinema admissions taken by national films.



2009-2013 In %.

1 EU 28 minus Belgium, Bulgaria, Greece, Ireland, Cyprus, Malta and Luxembourg.
2 EU 21 plus Iceland,Norway, Russia, Switzerland and Turkey.

European Audiovisual Observatory

T.7.15

Cinema admissions per inhabitant

2009-2013 Annual average.

Country	2009	2010	2011	2012	2013	2013/12
AL	~	~	~	~	~	~
AT	2.16	1.96	1.87	1.95	1.80	*-7.94%*
BA	0.12	0.19	0.12	0.17	~	~
BE	1.98	1.97	2.07	1.97	1.87	*-4.92%*
BG	0.43	0.54	0.64	0.56	0.66	*17.34%*
CH	1.98	1.90	1.89	1.95	1.70	*-12.71%*
CY	1.09	1.04	1.04	0.97	0.73	*-24.78%*
CZ	1.20	1.29	1.03	1.06	1.05	*-1.21%*
DE	1.78	1.55	1.59	1.68	1.61	*-4.22%*
DK	2.56	2.34	2.24	2.44	2.42	*-0.62%*
EE	1.33	1.59	1.85	1.94	1.93	*-0.43%*
ES	2.38	2.19	2.11	2.00	1.67	*-16.24%*
FI	1.28	1.41	1.33	1.55	1.44	*-7.35%*
FR	3.13	3.20	3.34	3.12	2.95	*-5.34%*
GB	2.80	2.71	2.72	2.72	2.59	*-4.64%*
GR	1.10	1.05	0.97	0.91	0.83	*-8.51%*
HR	0.82	0.78	0.83	0.95	0.94	*-1.31%*
HU	1.06	1.10	0.98	0.96	1.02	*7.04%*
IE	3.97	3.62	3.58	3.37	3.19	*-5.13%*
IS	5.16	4.73	4.68	4.52	4.35	*-3.84%*
IT	1.82	2.00	1.85	1.69	1.79	*6.04%*
LI	0.65	0.56	~	~	~	~
LT	0.85	0.83	1.00	1.01	1.10	*8.99%*
LU	2.61	2.42	2.50	2.39	2.26	*-5.60%*
LV	0.90	0.99	0.99	1.12	1.17	*5.07%*
ME	~	~	~	~	~	~
MK	0.06	0.05	0.04	0.10	~	~
MT	2.15	2.15	1.88	1.76	1.62	*-7.79%*
NL	1.66	1.70	1.83	1.83	1.84	*0.55%*
NO	2.65	2.27	2.37	2.43	2.34	*-3.93%*
PL	1.03	0.98	1.00	1.00	0.94	*-5.62%*
PT	1.49	1.57	1.49	1.31	1.20	*-8.67%*
RO	0.26	0.32	0.36	0.42	0.45	*8.79%*
RU	0.93	1.09	1.12	1.10	1.24	*12.59%*
SE	1.88	1.69	1.76	1.89	1.74	*-8.24%*
SI	1.31	1.41	1.42	1.33	1.13	*-14.93%*
SK	0.77	0.73	0.67	0.64	0.69	*8.29%*
TR	0.52	0.57	0.58	0.59	0.67	*13.45%*
EU 28	**1.95**	**1.91**	**1.91**	**1.87**	**1.79**	*-4.26%*
EU 36	**1.60**	**1.61**	**1.62**	**1.59**	**1.53**	*-3.86%*

➡ European Audiovisual Observatory

T.7.16 Gross box office in national currency

2009-2013 In millions.

Country	Currency	2009	2010	2011	2012	2013	2013/12	Sources
AL	ALL	~	~	~			–	~
AT	EUR	131.57	127.86	124.32	131.87	124.64	***-5.5%***	ÖFI
BA	BAM	2.18	3.50	2.31	3.37	~	~	SFF
BE ❶	EUR	141.56	144.48	159.60	168.28	162.70	***-3.3%***	SPF Economie DGSIE (09-11), SICR-ICDO (12)
BG ❶	BGN	25.21	32.46	36.67	33.98	39.83	***17.2%***	NFC
CH	CHF	229.50	228.67	230.82	242.60	212.95	***-12.2%***	OFS
CY	EUR	6.33	7.02	6.55	6.32	4.90	***-22.4%***	MEC / MS (09,12)
CZ	CZK	1 251.07	1 497.32	1 209.87	1 275.60	1 424.25	***11.7%***	Min.Cult./ UFD
DE	EUR	976.10	920.36	958.10	1 033.03	1 023.00	***-1.0%***	FFA
DK	DKK	1 046.61	994.60	937.25	1 053.41	1 051.81	***-0.2%***	DKS
EE	EEK/EUR ❷	117.77	122.03	10.05	11.43	11.81	***3.3%***	EFSA
ES	EUR	671.04	662.31	635.85	594.61	504.10	***-15.2%***	ICAA
FI	EUR	57.10	66.01	64.98	79.00	76.00	***-3.8%***	FFF
FR	EUR	1 236.41	1 308.92	1 374.00	1 305.63	1 250.00	***-4.3%***	CNC
GB	GBP	944.00	988.34	1 040.00	1 099.00	1 083.00	***-1.5%***	BFI/CAA
GR	EUR	100.24	99.44	92.99	70.18	59.31	***-15.5%***	MS
HR	HRK	84.37	87.56	98.61	111.94	120.97	***8.1%***	HAC
HU	HUF	11 236.45	12 642.67	11 850.00	12 000.00	13 490.00	***12.4%***	NFO
IE	EUR	124.60	116.30	111.84	108.00	102.76	***-4.9%***	CSA / IFB
IS	ISK	1 432.08	1 411.35	1 494.63	1 524.64	~	~	HI
IT	EUR	664.07	772.77	697.21	641.65	646.34	***0.7%***	ANICA / SIAE
LI	CHF	0.30	0.26	~	~	~	~	MS/OFS
LT	LTL	36.64	33.98	37.08	40.55	45.38	***11.9%***	SL
LU	EUR	8.87	8.78	9.40	9.42	9.15	***-2.9%***	MS
LV	LVL	5.88	5.95	5.90	6.86	7.25	***5.7%***	NFC
ME	EUR	~	~	~	~	~	~	~
MK	MKD	~	~	~	~	~	~	~
MT	EUR	3.50	4.60	4.21	3.97	3.69	***-7.0%***	MS
NL	EUR	200.98	219.37	240.04	244.60	249.51	***2.0%***	MaccsBox - NVB & NVF
NO	NOK	1 042.14	954.03	1 039.66	1 110.12	1 095.18	***-1.3%***	F&K
PL	PLN	681.27	702.99	716.19	711.30	665.14	***-6.5%***	boxoffice.pl
PT	EUR	73.84	82.24	79.94	73.86	65.50	***-11.3%***	ICA
RO	RON	86.94	111.64	124.71	144.79	160.52	***10.9%***	CNC
RU ❸	RUB	22 426.88	30 445.38	34 067.08	37 552.99	42 557.37	***13.3%***	Nevafilm / RFB
SE	SEK	1 545.87	1 472.21	1 569.10	1 815.67	1 644.07	***-9.5%***	SFI
SI	EUR	11.26	12.81	12.98	12.00	11.09	***-7.6%***	SFC
SK	EUR	16.91	18.03	17.25	17.55	19.00	***8.3%***	SKFI / AIC
TR	TRY	308.23	380.20	398.36	421.90	505.26	***19.8%***	ANTRAKT
US & CA	USD	10 610.18	10 579.12	10 185.77	10 810.78	10 919.72	***1.0%***	MPAA
JP	JPY	206 035.00	220 700.00	181 197.00	195 190.00	194 236.45	***-0.5%***	EIREN

➥ European Audiovisual Observatory

❶ Restated series.
❷ Euro since 2011. Estonian Kroon until 2010.
❸ Restated data series - Figures refer to Russia only, as estimated by Nevafilm Research, based on data collected by Russian Film Business Today covering the CIS excluding Ukraine. From 2011 onward data refer to the calendar year; previous data refer to the distribution year (from 1 December to 30 November).

T.7.17

Gross box office in Euros

2009-2013 In EUR million.

Country	Currency converted from	2009	2010	2011	*prov.* 2013	*prov.* 2013	*2013/12*	Sources
AL	ALL						**~**	~
AT	EUR	131.572	127.857	124.324	131.868	124.636	***-5.5%***	ÖFI
BA	BAM	1.115	1.790	1.179	1.722	2.427	***41.0%***	SFF
BE [1]	EUR	141.561	144.481	159.598	158.756	162.700	***2.5%***	SPF Economie DGSIE (09-11), SICR-ICDO
BG [1]	BGN	12.887	16.592	18.749	17.388	20.331	***16.9%***	NFC
CH	CHF	151.999	165.694	187.544	201.317	167.602	***-16.7%***	OFS
CY	EUR	6.333	7.020	6.546	6.316	4.899	***-22.4%***	MEC / MS (09,12)
CZ	CZK	47.415	59.294	49.242	50.807	54.833	***7.9%***	Min.Cult./ UFD
DE	EUR	976.105	920.360	958.096	1 033.000	1 022.996	***-1.0%***	FFA
DK	DKK	140.560	133.574	125.779	141.525	141.048	***-0.3%***	DKS
EE	EEK/EUR [2]	7.526	7.798	10.051	11.429	11.810	***3.3%***	EFSA
ES	EUR	671.044	662.305	635.848	611.085	504.097	***-17.5%***	ICAA
FI	EUR	57.100	66.007	64.984	78.830	76.000	***-3.6%***	FFF
FR	EUR	1 236.410	1 308.921	1 374.000	1 305.627	1 250.000	***-4.3%***	CNC
GB	GBP	1 059.829	1 152.012	1 198.600	1 355.375	1 275.449	***-5.9%***	BFI/CAA
GR	EUR	100.239	99.436	92.988	70.184	59.310	***-15.5%***	MS
HR	HRK	11.491	12.013	13.263	14.925	15.944	***6.8%***	HAC
HU	HUF	40.451	45.514	42.660	41.640	45.866	***10.1%***	NFO
IE	EUR	124.600	116.300	111.840	108.303	102.759	***-5.1%***	CSA / IFB
IS	ISK	8.306	8.609	9.267	9.514	8.940	***-6.0%***	HI
IT	EUR	664.069	772.772	697.209	637.101	646.339	***1.4%***	ANICA / SIAE
LI	CHF	0.201	0.185	~	~	~		MS/OFS
LT	LTL	10.610	9.840	10.737	11.818	13.101	***10.9%***	SL
LU	EUR	8.872	8.775	9.400	9.424	9.152	***-2.9%***	MS
LV	LVL	8.326	8.400	8.349	9.878	10.284	***4.1%***	NFC
ME	EUR						**~**	~
MK	MKD					~	**~**	~
MT	EUR	3.500	4.600	4.210	3.965	3.688	***-7.0%***	MS
NL	EUR	200.975	219.374	240.037	244.600	249.508	***2.0%***	MaccsBox - NVB & NVF
NO	NOK	119.326	119.063	133.285	148.523	135.935	***-8.5%***	F&K
PL	PLN	157.783	176.099	174.393	170.378	158.436	***-7.0%***	boxoffice.pl
PT	EUR	73.842	82.243	79.939	73.865	65.495	***-11.3%***	ICA
RO	RON	20.518	26.515	29.431	32.525	36.294	***11.6%***	CNC
RU [3]	RUB	509.090	758.090	834.644	942.580	975.099	***3.5%***	Nevafilm / RFB
SE	SEK	145.621	154.288	173.856	208.729	190.055	***-8.9%***	SFI
SI	EUR	11.257	12.811	12.982	12.003	11.091	***-7.6%***	SFC
SK	EUR	16.906	18.032	17.254	17.548	19.002	***8.3%***	SKFI / AIC
TR	TRY	142.650	190.405	171.256	182.463	193.930	***6.3%***	ANTRAKT
EUR 28 *est.*		**6 087.402**	**6 373.232**	**6 444.756**	**6 569.527**	**6 285.123**	***-4.3%***	OBS
EUR 37 *est.*		**7 204.769**	**7 784.633**	**7 782.116**	**8 055.833**	**7 769.242**	***-3.6%***	OBS
US & CA	USD	7 629.780	7 985.117	7 322.551	8 413.489	8 498.269	***1.0%***	MPAA
JP	JPY	1 586.470	1 898.020	1 630.773	1 905.054	1 895.748	***-0.5%***	EIREN

[1] Restated series.

[2] Euro since 2011. Estonian Kroon until 2010.

[3] Restated data series - Figures refer to Russia only, as estimated by Nevafilm Research, based on data collected by Russian Film Business Today covering the CIS excluding Ukraine. From 2011 onward data refer to the calendar year; previous data refer to the distribution year (from 1 December to 30 November).

➥ European Audiovisual Observatory

T.7.18

Average cinema ticket price

2009-2013 In national currency.

Country	Currency	2009	2010	2011	2012	2013	2013/12
AL	ALL	~	~	~	~	~	~
AT	EUR	7.09	7.53	7.59	8.04	8.21	2.1%
BA	BAM	4.85	4.86	4.86	5.20	~	~
BE	EUR	6.86	6.90	7.00	7.70	7.78	1.1%
BG	BGN	7.94	8.16	7.76	8.27	8.31	0.5%
CH	CHF	15.05	15.49	15.50	15.62	15.54	-0.5%
CY	CYP/EUR [1]	7.29	8.23	8.18	7.52	7.72	2.7%
CZ	CZK	100.33	110.61	112.13	114.08	128.80	12.9%
DE	EUR	6.67	7.27	7.39	7.65	7.89	3.1%
DK	DKK	74.32	76.79	75.38	77.51	77.56	0.1%
EE	EEK/EUR [2]	66.15	57.25	4.07	4.42	4.62	4.5%
ES	EUR	6.10	6.52	6.47	6.35	6.45	1.5%
FI	EUR	8.35	8.73	9.10	9.43	9.74	3.4%
FR	EUR	6.14	6.32	6.33	6.41	6.46	0.7%
GB	GBP	5.44	5.84	6.06	6.37	6.54	2.7%
GR	EUR	8.16	8.49	8.52	6.94	6.44	-7.1%
HR	HRK	23.94	26.09	27.71	27.54	30.26	9.9%
HU	HUF	1059.93	1151.90	1209.18	1263.16	1329.72	5.3%
IE	EUR	7.06	7.05	6.84	7.00	7.01	0.1%
IS	ISK	831.59	893.06	989.82	1054.69	~	~
IT	EUR	6.08	6.41	6.22	6.41	6.06	-5.5%
LI	CHF	13.22	12.80	~	~	~	~
LT	LTL	13.43	12.79	12.38	13.43	13.93	3.8%
LU	EUR	6.93	7.22	7.19	7.50	7.54	0.5%
LV	LVL	3.02	2.83	2.86	3.00	3.05	1.6%
ME	EUR	~	~	~	~	~	~
MK	MKD	~	~	~	~	~	~
MT	MTL/EUR [3]	3.95	4.37	~	5.40	5.40	0.0%
NL	EUR	7.36	7.78	7.88	8.00	8.10	1.2%
NO	NOK	82.05	86.57	89.20	91.56	~	~
PL	PLN	17.39	18.75	18.50	18.49	18.32	-0.9%
PT	EUR	4.70	4.97	5.09	5.35	5.22	-2.4%
RO	RON	16.47	17.15	17.24	17.34	17.74	2.3%
RU	RUB	169.46	195.26	213.17	239.19	240.26	0.4%
SE	SEK	88.87	93.03	95.57	101.22	99.12	-2.1%
SI	EUR	4.24	4.44	4.47	4.38	4.75	8.4%
SK	SKK/EUR [4]	4.08	4.61	4.79	5.11	5.10	-0.1%
TR	TRY	8.35	9.26	9.40	9.61	10.02	4.3%
US & CA	USD	7.50	7.89	7.93	7.96	8.13	2.1%
JP	JPY	1217.00	1265.79	1252.00	1258.00	1246.00	-1.0%

Average ticket price = box office in local currency divided by admissions.

➥ European Audiovisual Observatory

[1] Euro since 2008. Cyprus Pound until 2007.
[2] Euro since 2011. Estonian Kroon until 2010.
[3] Euro since 2008. Maltese Lira until 2007.
[4] Euro since 2009. Slovak Koruna until 2008.

T.7.19

Average cinema ticket price

2009-2013 In EUR.

Country	2009	2010	2011	2012	2013	2013/12
AL	~	~	~	~	~	~
AT	7.09	7.53	7.59	8.04	8.21	2.1%
BA	2.48	2.48	2.49	2.66	~	~
BE	6.86	6.90	7.00	7.27	7.78	7.1%
BG	4.06	4.17	3.97	4.23	4.24	0.2%
CH	9.97	11.22	12.59	12.96	12.23	-5.6%
CY	7.29	8.23	8.18	7.52	7.72	2.7%
CZ	3.80	4.38	4.56	4.54	4.96	9.1%
DE	6.67	7.27	7.39	7.65	7.89	3.1%
DK	9.98	10.31	10.12	10.41	10.40	-0.1%
EE	4.23	3.66	4.07	4.42	4.62	4.5%
ES	6.10	6.52	6.47	6.35	6.45	-1.3%
FI	8.35	8.73	9.10	9.41	9.74	3.6%
FR	6.14	6.32	6.33	6.41	6.46	0.7%
GB	6.11	6.81	6.99	7.86	7.70	-1.9%
GR	8.16	8.49	8.52	6.94	6.44	-7.1%
HR	3.26	3.58	3.73	3.67	3.99	8.6%
HU	3.82	4.15	4.35	4.38	4.52	3.1%
IE	7.06	7.05	6.84	7.02	7.01	-0.2%
IS	4.82	5.45	6.14	6.58	~	~
IT	6.08	6.41	6.22	6.36	6.06	-4.8%
LI	8.75	9.27	~	~	~	~
LT	3.89	3.70	3.59	3.91	4.02	2.8%
LU	6.93	7.22	7.19	7.50	7.54	0.5%
LV	4.28	3.99	4.05	4.32	4.33	0.1%
ME	~	~	~	~	~	~
MK	~	~	~	~	~	~
MT	3.95	4.37	~	5.40	5.40	0.0%
NL	7.36	7.78	7.88	8.00	8.10	1.2%
NO	9.39	10.80	11.44	12.25	~	~
PL	4.03	4.70	4.50	4.43	4.36	-1.5%
PT	4.70	4.97	5.09	5.35	5.22	-2.4%
RO	3.89	4.07	4.07	3.90	4.01	3.0%
RU	3.85	4.86	5.22	6.00	5.50	-8.3%
SE	8.37	9.75	10.59	11.64	11.46	-1.5%
SI	4.24	4.44	4.47	4.38	4.75	8.4%
SK	4.08	4.61	4.79	5.11	5.10	-0.1%
TR	3.87	4.64	4.04	4.16	3.85	-7.4%
US & CA	5.39	5.95	5.70	6.19	6.33	2.1%
JP	9.37	10.89	11.27	12.28	12.16	-1.0%

Average ticket price = box office in EUR divided by admissions.
Exchange rate for conversion = average mid point rate for each year.

European Audiovisual Observatory

T.7.20 Top 50 films by admissions in Europe 2013

Rank	Original title	Country of origin ❶	Total ❷	AT	BE	BG
1	Despicable Me 2	**US**	32 187 467	424 527	560 951	126 196
2	The Hobbit: The Desolation of Smaug	**US/NZ inc**	28 643 123	485 154	670 985	176 258
3	Iron Man 3	**US/CN**	26 075 864	276 252	385 177	103 551
4	Furious 6	**US/ES**	24 393 829	393 771	505 430	229 753
5	The Hunger Games: Catching Fire	**US**	23 494 491	354 658	676 275	118 179
6	Frozen	**US**	22 548 310	383 333	515 719	178 198
7	The Croods	**US**	21 327 639	303 169	468 471	73 942
8	Django Unchained	**US**	18 887 806	549 992	413 757	44 501
9	Monsters University	**US**	18 750 692	209 937	253 416	85 471
10	Gravity	**US/GB inc**	16 550 537	97 208	463 707	50 007
11	Thor: The Dark World	**US**	15 879 559	197 529	235 019	130 550
12	World War Z	**US**	15 500 068	174 108	322 712	83 650
13	The Hangover Part III	**US**	14 785 077	484 638	273 164	70 040
14	The Smurfs 2	**US**	14 032 171	347 614	643 973	98 583
15	Now You See Me	**US**	13 883 976	114 965	330 031	90 770
16	Turbo	**US**	12 158 972	151 785	440 722	43 917
17	Oz the Great and Powerful	**US**	11 528 249	125 547	207 782	86 514
18	The Wolverine	**US/GB**	11 180 404	119 075	254 093	60 214
19	Life of Pi ❹	**US/TW**	11 115 536	106 427	201 426	24 993
20	Man of Steel	**US/CA/GB**	10 886 898	104 357	235 919	33 414
21	The Hobbit: An Unexpected Journey ❺	**US/NZ inc**	9 866 932	127 886	496 999	58 310
22	We're the Millers	**US**	9 442 950	209 387	290 226	52 639
23	The Great Gatsby	**AU/US**	9 377 921	148 232	301 365	55 771
24	Les Misérables ❻	**GB/US**	9 293 354	103 032		14 362
25	A Good Day to Die Hard	**US**	8 168 240	223 301	231 170	98 788
26	Sole a catinelle	**IT**	8 035 619			
27	Star Trek: Into Darkness	**US**	7 998 704	151 583		31 496
28	Planes	**US**	7 888 302	119 366	226 390	55 817
29	Elysium	**US**	7 120 112	121 144	203 182	51 066
30	Epic	**US**	7 047 554	130 451	162 748	54 399
31	Oblivion	**US**	6 746 216	103 213	196 594	63 445
32	Wreck-It Ralph ❼	**US**	6 391 903	34 268	163 737	1 177
33	Stalingrad	**RU**	6 278 222			
34	Fack ju Göhte	**DE**	6 143 316	354 675		
35	The Lone Ranger	**US**	5 892 598	152 759	145 039	67 945
36	The Conjuring	**US**	5 666 049	99 325	323 427	17 881
37	Lincoln	**US**	5 557 495	46 388	142 994	
38	After Earth	**US**	5 189 282	61 398	191 799	37 179
39	Captain Phillips	**US**	4 937 126	37 722		20 813
40	Rush	**GB inc/US/DE**	4 848 777	391 469		
41	Percy Jackson: Sea of Monsters	**US**	4 806 903	70 662	187 964	35 099
42	Hansel & Gretel: Witch Hunters	**US/DE**	4 761 389	205 056	163 679	135 816
43	Blue Jasmine	**US**	4 715 145	80 915		13 163
44	G.I. Joe: Retaliation	**US**	4 615 389	131 241	160 704	95 487
45	Pacific Rim	**US**	4 603 975	66 535		32 861
46	Grown Ups 2	**US**	4 508 499	264 491		29 042
47	Lo imposible ❽	**ES**	4 432 488	6 133	363 097	15 706
48	Cloudy with a Chance of Meatballs 2	**US**	4 265 350	113 798		49 124
49	Silver Linings Playbook ❾	**US**	4 263 405	66 223		25 703
50	Legtenda No. 17	**RU**	4 200 000			
	Sources			ÖFI	FCB/CCA-FWB	NFC

❶ 'inc' refers to films produced in Europe with US investment.
❷ Including - at least partial data - from AT, BE, BG, CH, CZ, DE, DK, EE, ES, FI, FR, GB/IE, GR, HR, HU, IT, LT, ME, NL, NO, PL, PT, RO, RU, SE, SI, SK, TR.
❸ Admissions estimated based on the division of GBO by the average ticket price.
❹ 6 905 975 admissions in 2012.
❺ 29 104 326 admissions in 2012.

CH	CZ	DE	DK	ES	FI	FR	GB/IE [3]	GR
390 322	258 555	3 671 477	268 052	2 161 591	258 215	4 655 036	7 256 469	199 235
396 914	493 999	4 598 732	478 843	1 860 663	355 693	2 705 290	5 705 954	331 105
241 377	265 176	1 921 563	276 983	1 418 636	141 365	4 386 028	5 652 181	206 006
343 966	173 837	2 864 866	247 818	1 456 529	130 183	2 992 586	3 864 677	181 682
322 056	140 267	3 454 421	338 651	1 564 336	206 349	2 639 671	5 045 241	98 379
296 659	146 262	3 332 967	274 233	1 809 680	99 495	2 719 316	4 710 657	126 270
265 288	199 060	2 348 464	209 853	2 103 153	107 984	2 377 680	4 089 359	65 927
362 054	199 651	4 492 362	207 625	1 533 648	139 001	4 303 569	2 406 251	154 170
97 164	218 172	1 402 630	177 401	1 855 487	146 164	2 133 524	4 685 587	99 587
182 445	231 424	1 301 565	195 191		118 648	4 045 339	4 228 767	214 448
126 390	194 228	1 389 517	132 985		75 807	2 306 445	3 034 208	128 339
130 683	87 728	1 377 283	124 203	1 803 664	74 340	2 458 104	2 228 065	99 897
318 861	105 024	3 103 510	163 436		121 888	1 930 520	2 954 526	217 092
176 053	342 938	2 510 000	209 504		116 429	2 263 030	1 894 239	185 410
145 504	86 930	512 441	115 512	1 620 594	108 784	3 010 483	1 713 784	100 813
180 194	118 353	1 143 427	112 867		71 556	2 432 623	1 785 459	42 935
88 063	84 935	1 145 552	65 054		55 103	1 590 935	2 335 764	80 106
105 860	79 257	896 671	95 437		50 386	1 989 081	2 094 557	105 006
153 623	53 245	1 617 142	191 886		91 342	1 195 681	1 845 685	172 427
99 247	77 795	754 114	140 601		67 223	2 318 189	4 579 630	129 721
122 498	186 107	2 168 645	314 663		136 671	2 209 342	1 140 544	138 598
190 338	76 079	1 274 822	101 237		100 237	521 458	1 309 213	143 678
207 065	181 727	1 340 429	112 014		84 853	1 586 930	2 405 899	137 411
70 095	138 493	602 567	194 039		76 863	233 027	6 241 330	53 087
165 606	40 969	1 557 500	185 399		109 074	1 832 499	1 664 234	64 332
30 267								
77 346	85 755	1 516 301	49 639		46 405	883 728	3 948 167	32 613
89 379	147 863	819 508	168 958		157 829	1 655 091	1 369 121	113 811
94 183	87 240	990 956	74 764		65 023	1 517 597	1 386 187	85 976
107 621	99 949	1 111 202	82 875		54 991	1 209 322	2 100 431	31 011
108 370	85 341	854 445	83 076		69 412	1 331 585	1 628 378	19 963
21 968	9 436	299 926	151 930		107 318		3 636 030	70 342
166 368		5 622 273						
92 665	73 897	1 009 023	95 445		111 806	1 175 172	703 511	102 195
27 572	84 719	453 648	54 694		35 506	1 163 239	1 600 107	158 310
140 070	42 579	590 217	71 099		19 502	1 361 329	1 339 130	110 339
43 078	24 690	554 640	61 405		40 591	1 276 118	961 921	45 635
44 321	36 652	373 124	70 568		25 293	453 380	2 427 453	152 801
79 002	154 426	540 271	24 376		29 595	342 628	1 543 328	36 144
45 922	66 213	557 667	27 816		18 376	1 469 569	1 115 380	25 992
89 213	102 035	1 345 264	20 777		36 337	854 755	546 305	
133 677	51 744	422 629	94 393		40 687	1 430 721	787 367	160 013
92 429	39 933	800 306	47 115		27 925	824 702	1 141 197	
43 971	67 269	503 933	67 527		35 263	1 025 516	1 283 206	51 053
118 183	36 224	1 428 671	65 827			98 541	1 338 998	27 216
28 727	29 169		82 651		21 674		2 037 493	103 247
30 494	90 956	1 091 498			37 831		1 852 886	73 591
118 833	60 884	350 301	159 482		48 690	1 067 238	113 570	111 266
OFS	Min.Cult./ UFD	FFA	DKS	ICAA	FFF	CNC	CAA/BFI	MS

[6] 477 172 admissions in 2012.
[7] 5 608 982 admissions in 2012.
[8] 6 563 485 admissions in 2012.
[9] 741 397 admissions in 2012.

1 2 3 4 5 6 7 8

T.7.20 Top 50 films by admissions in Europe 2013

continued

Rank	Original title	Country of origin [1]	Total [2]	HR	HU	IT
1	Despicable Me 2	**US**	32 187 467	77 833	331 951	2 396 999
2	The Hobbit: The Desolation of Smaug	**US/NZ inc**	28 643 123	149 657	291 212	1 462 728
3	Iron Man 3	**US/CN**	26 075 864	58 707	303 457	2 289 885
4	Furious 6	**US/ES**	24 393 829	68 401	166 323	1 970 531
5	The Hunger Games: Catching Fire	**US**	23 494 491	51 794	181 246	1 252 962
6	Frozen	**US**	22 548 310	61 973	250 489	1 735 921
7	The Croods	**US**	21 327 639	72 258	176 210	1 700 087
8	Django Unchained	**US**	18 887 806	46 510	204 063	1 865 274
9	Monsters University	**US**	18 750 692	36 015	178 847	1 421 951
10	Gravity	**US/GB inc**	16 550 537	57 631	227 473	691 984
11	Thor: The Dark World	**US**	15 879 559	50 180	168 922	1 186 206
12	World War Z	**US**	15 500 068	47 812	146 586	776 936
13	The Hangover Part III	**US**	14 785 077	97 513	263 481	1 942 171
14	The Smurfs 2	**US**	14 032 171	205 217	219 530	1 005 767
15	Now You See Me	**US**	13 883 976	95 208	179 545	741 035
16	Turbo	**US**	12 158 972	55 625	156 136	730 619
17	Oz the Great and Powerful	**US**	11 528 249	33 294	120 256	1 067 662
18	The Wolverine	**US/GB**	11 180 404	30 927	110 039	764 732
19	Life of Pi [4]	**US/TW**	11 115 536	42 924		557 834
20	Man of Steel	**US/CA/GB**	10 886 898	54 960	97 974	720 785
21	The Hobbit: An Unexpected Journey [5]	**US/NZ inc**	9 866 932	89 097		355 569
22	We're the Millers	**US**	9 442 950	50 648	285 249	689 814
23	The Great Gatsby	**AU/US**	9 377 921	47 247	149 671	1 195 257
24	Les Misérables [6]	**GB/US**	9 293 354	13 145		326 104
25	A Good Day to Die Hard	**US**	8 168 240	28 810	171 327	344 820
26	Sole a catinelle	**IT**	8 035 619			8 005 352
27	Star Trek: Into Darkness	**US**	7 998 704	54 581	90 491	296 574
28	Planes	**US**	7 888 302	29 777	119 492	592 772
29	Elysium	**US**	7 120 112	38 707	140 850	759 492
30	Epic	**US**	7 047 554	43 221	107 904	430 196
31	Oblivion	**US**	6 746 216	30 988	120 849	699 168
32	Wreck-It Ralph [7]	**US**	6 391 903	39 297		416 618
33	Stalingrad	**RU**	6 278 222			
34	Fack ju Göhte	**DE**	6 143 316			
35	The Lone Ranger	**US**	5 892 598	15 286	54 658	665 837
36	The Conjuring	**US**	5 666 049	19 206	68 852	563 958
37	Lincoln	**US**	5 557 495	14 153	24 706	1 067 782
38	After Earth	**US**	5 189 282	15 649	101 514	720 239
39	Captain Phillips	**US**	4 937 126	23 702	55 619	259 753
40	Rush	**GB inc/US/DE**	4 848 777	44 935	88 481	1 030 274
41	Percy Jackson: Sea of Monsters	**US**	4 806 903	7 663	57 543	472 934
42	Hansel & Gretel: Witch Hunters	**US/DE**	4 761 389	15 729	59 201	436 000
43	Blue Jasmine	**US**	4 715 145	12 594	31 245	547 153
44	G.I. Joe: Retaliation	**US**	4 615 389	18 402	69 457	318 294
45	Pacific Rim	**US**	4 603 975	26 582	94 372	445 598
46	Grown Ups 2	**US**	4 508 499	11 486	218 913	27 948
47	Lo imposible [8]	**ES**	4 432 488	24 451	22 084	607 067
48	Cloudy with a Chance of Meatballs 2	**US**	4 265 350	29 212	50 306	276 434
49	Silver Linings Playbook [9]	**US**	4 263 405	30 989	61 985	864 667
50	Legtenda No. 17	**RU**	4 200 000			
	Sources			CBS	NFO	ANICA/SIAE

[1] 'inc' refers to films produced in Europe with US investment.

[2] Including - at least partial data - from AT, BE, BG, CH, CZ, DE, DK, EE, ES, FI, FR, GB/IE, GR, HR, HU, IT, LT, ME, NL, NO, PL, PT, RO, RU, SE, SI, SK, TR.

[3] Admissions estimated based on the division of GBO by the average ticket price.

[4] 6 905 975 admissions in 2012.

[5] 29 104 326 admissions in 2012.

NL	NO	PL	PT	RO	RU	SE	TR
914 953	267 122	553 178	299 039	164 105	5 418 036	428 039	690 113
798 916	479 232	1 160 770	253 302	304 613	3 379 472	749 444	1 055 935
436 509	292 389	611 850	181 940	192 862	5 229 440	324 587	717 594
624 055	273 485	478 428	426 919	261 312	4 988 981	290 657	1 180 395
687 425	322 522	697 897	223 061	152 225	3 400 000	558 583	860 282
533 068	212 773	1 054 856	405 637	88 071	3 442 370		
433 916	246 690	588 067	265 045	162 088	4 200 000	302 040	256 157
424 447	182 542	442 579	187 590	101 755		338 743	139 771
234 209	180 581	627 898	248 825	82 348	3 500 000	280 833	361 449
390 295	127 616	534 213	112 153	165 606	2 300 000	239 187	395 872
246 114	165 420	447 735	160 906	225 293	4 300 000	228 442	615 284
290 918	188 639	364 683	205 930	136 427	3 215 130	261 972	758 459
614 805	218 489	541 690	275 398	169 654		221 170	421 424
627 635	185 986	823 820	256 559	162 792		267 530	1 115 160
405 838	56 290	555 945	229 636	212 030	3 041 507	96 295	184 800
414 336	137 108	366 814	162 213	72 318	2 935 699	190 111	178 480
185 381	79 573	338 491	80 075	138 059	3 194 099	155 544	183 351
194 581	109 098	161 825	132 749	136 739	3 015 997	141 002	455 929
321 995	144 122	386 105	115 723	121 998	3 082 000	281 620	302 543
238 816	173 923	202 589	109 513	136 621		210 315	314 007
400 539	157 340	980 247	66 753	117 773		349 133	144 403
366 614	78 396	357 148	79 599	190 432	2 718 981	90 480	92 562
263 087	104 243	314 897	96 692	159 298		198 876	121 586
274 190	164 892	229 098	154 886	32 687		194 125	86 647
285 780	178 024	228 760	134 214	82 291		187 821	226 287
156 870	68 323	103 239	54 843	63 679		103 473	124 649
292 931	172 786	582 244	188 531	93 616		306 675	398 721
241 042	79 443	325 972	144 605	129 946		191 751	293 355
162 873	117 990	422 321	96 852	64 464		126 137	143 198
195 146	105 540	192 065	118 539	97 257		157 924	390 380
119 696	232 835	429 033	6 374	3 915		340 170	187 621
		39 915			6 200 000		
292 064	109 252	272 109	116 736	72 995		178 392	308 757
140 738	98 809	321 442	62 302	51 075		64 053	171 831
146 603	73 605	60 220	142 452	34 418		46 591	49 038
211 548	75 788	233 645	88 922	67 419		121 506	199 760
201 020	66 899	298 710	70 607	69 301		92 183	111 330
53 170	24 262	236 946	61 929	35 320		38 738	37 611
111 699	50 378	129 667	31 455	46 650		49 603	199 340
83 679	62 785	71 043	54 552	81 171		42 384	285 957
195 088	39 192	398 514	78 416	19 491		81 348	62 833
122 547	65 243	51 457	97 628	99 342		69 719	280 927
151 827	75 054	156 445	54 459	111 333		95 369	142 074
182 277	61 939	126 642	81 781	98 377		108 290	76 100
191 696	71 370	502 232	223 934	39 199		21 555	19 954
		263 337	43 206	56 666		81 934	
167 178	49 693	417 669	139 007	50 003		166 396	122 023
					4 200 000		
MaccsBox - NVB & NVF	F&K	boxoffice.pl	ICA	CNC	Nevafilm/RFB/OBS	SFI	ANTRAKT

6 477 172 admissions in 2012.
7 5 608 982 admissions in 2012.
8 6 563 485 admissions in 2012.
9 741 397 admissions in 2012.

European Audiovisual Observatory

T.7.21 Top 50 European films by admissions in Europe 2013

Rank	Original title	Country of origin [1]	Total [2]	AT	BE	BG
1	Les Misérables [4]	GB/US	9 293 354	103 032		14 362
2	Sole a catinelle	IT	8 035 619			
3	Stalingrad	RU	6 278 222			
4	Fack ju Göhte	DE	6 143 316	354 675		
5	Rush	GB Inc/US/DE	4 848 777	391 469		
6	Lo imposible [5]	ES	4 432 488	6 133	363 097	15 706
7	Legenda No. 17	RU	4 200 000			
8	Dügün dernek	TR	4 146 057	25 239		
9	Les profs	FR	4 008 690			
10	CM101MMXI Fundamentals	TR	3 842 817	242		
11	Gorko!	RU	3 748 925			
12	Tri bogatyrya na dalnikh beregakh [6]	RU	3 267 525			
13	Kokowääh 2	DE	3 133 114	213 495		
14	Celal ile Ceren	TR	2 912 737	20 525		
15	Schlussmacher	DE	2 810 350	176 443		
16	Quartet	GB	2 596 922	24 475		577
17	I Give It a Year	GB/FR/DE	2 547 229	59 379		9 984
18	Il principe abusivo	IT	2 386 425			
19	About Time	GB	2 298 565	28 350		14 025
20	Philomena	GB/US/FR	2 215 434			
21	Kelebegin ruyasi	TR	2 185 007	5 971		
22	Selam	TR	2 155 721	3 072		
23	La cage dorée	FR	2 069 704	20 704		
24	Boule & Bill	FR/BE/LU	2 053 382			
25	Los amantes pasajeros	ES	2 032 450	9 762		6 040
26	9 mois ferme	FR	2 016 500			
27	Les garçons et Guillaume, à table!	FR/BE	1 979 986			
28	Eyjafjallajökull	FR	1 959 153		143 640	
29	Jappeloup	FR/CA	1 840 540			
30	Paulette	FR	1 746 882	40 717		
31	La migliore offerta	IT	1 718 879	43		9 416
32	La grande bellezza	IT/FR	1 714 459	8 952		
33	Les gamins	FR	1 697 892			
34	Cloud Atlas [7]	DE/US	1 639 641	1 900		1 164
35	La vie d'Adèle	FR/BE/ES	1 605 073	4 674		
36	20 ans d'écart	FR	1 567 852			
37	The World's End	GB/US/JP	1 566 593	17 758		
38	Hükümet kadin 2	TR	1 547 854	10 799		
39	Romantik Komedi 2: Bekarliga Veda	TR	1 525 871	6 511		
40	Diana	GB/FR/SE/BE	1 471 293			
41	Hükümet kadin	TR	1 423 677	5 660		
42	Benim dünyam	TR	1 405 495	7 176		
43	Benvenuto Presidente!	IT	1 383 987			
44	Night Train to Lisbon	DE/CH/PT	1 368 414	60 870		
45	Colpi di fortuna	IT	1 333 256			
46	Justin and the Knights of Valour	ES	1 319 266			
47	Alceste à bicyclette	FR	1 276 474			
48	Fünf Freunde 2	DE	1 275 436	98 360		
49	Sur le chemin de l'école	FR/CN/ZA/BR/CO	1 264 610	1 874		
50	Frau Ella	DE	1 244 068	29 870		
	Source			ÖFI	FCB/ CCA-FWB	NFC

[1] 'inc' refers to films produced in Europe with US investment.
[2] Including - at least partial data - from AT, BE, BG, CH, CZ, DE, DK, EE, ES, FI, FR, GB/IE, GR, HR, HU, IT, LT, ME, NL, NO, PL, PT, RO, RU, SE, SI, SK, TR.
[3] Admissions estimated based on the division of GBO by the average ticket price.
[4] 477 172 admissions in 2012.
[5] 741 397 admissions in 2012.

CH	CZ	DE	DK	ES	FI	FR	GB/IE ❸	GR
70 095	138 493	602 567	194 039		76 863	233 027	6 241 330	53 087
30 267								
166 368		5 622 273						
79 002	154 426	540 271	24 376		29 595	342 628	1 543 328	36 144
28 727	29 169		82 651		21 674		2 037 493	103 247
2 291							11 025	
53 577						3 955 113		
170 480		2 749 139						
4 128							9 757	
64 060		2 569 847						
60 066		340 416	46 791		55 288	326 640	1 312 817	10 327
58 462	19 384	559 546	16 603		48 656	339 404	951 670	2 162
5 950								
34 343	62 557		18 244		19 068	201 984	1 174 304	17 486
285			51 131		1 092		1 631 436	
2 385							7 251	
							2 289	
49 485						1 229 587		
39 791					6 995	2 006 408	188	
51 493	11 841		3 827	706 279	22 377	533 232	129 606	57 577
19 426						1 997 074		
35 706						1 944 280		
28 080						1 787 433		
20 200						1 820 340		
9 972	6 038	509 030				1 033 936		
	16 248							64 577
30 873	16 798		23 919			201 754	139 662	20 780
22 869	2 810					1 646 707		5 839
39 614	28 020	92 472	27 834		31 538	444 347	256 746	3 283
27 850	7 000		35 602		6 009	986 178	90 754	58 695
18 953						1 402 940		
481	5 954		1 051		6 803	125 304	1 333 255	
2 758							14 378	
							4 883	
9 465	33 453		121 321		25 580	313 344	296 723	10 234
							10 770	
4 432							7 557	
169 767		814 425						16 973
11 757								
	33 615			385 055			473 917	
25 505	832		3 554			1 168 043		
45 238		1 131 838						
54 395						1 101 703		
15 787		1 198 411						
OFS	Min.Cult./ UFD	FFA	DKS	ICAA	FFF	CNC	CAA/BFI	MS

❻ 825 886 admissions in 2012.

❼ 4 905 431 admissions in 2012.

T.7.21 Top 50 European films by admissions in Europe
2013

continued

Rank	Original title	Country of origin ❶	Total ❷	HR	HU	IT
1	Les Misérables ❹	**GB/US**	9 293 354	13 145		326 104
2	Sole a catinelle	**IT**	8 035 619			8 005 352
3	Stalingrad	**RU**	6 278 222			
4	Fack ju Göhte	**DE**	6 143 316			
5	Rush	**GB Inc/US/DE**	4 848 777	44 935	88 481	1 030 274
6	Lo imposible ❺	**ES**	4 432 488	24 451	22 084	607 067
7	Legenda No. 17	**RU**	4 200 000			
8	Dügün dernek	**TR**	4 146 057			
9	Les profs	**FR**	4 008 690			
10	CM101MMXI Fundamentals	**TR**	3 842 817			
11	Gorko!	**RU**	3 748 925			
12	Tri bogatyrya na dalnikh beregakh ❻	**RU**	3 267 525			
13	Kokowääh 2	**DE**	3 133 114			
14	Celal ile Ceren	**TR**	2 912 737			
15	Schlussmacher	**DE**	2 810 350			
16	Quartet	**GB**	2 596 922		8 135	267 661
17	I Give It a Year	**GB/FR/DE**	2 547 229	6 227	46 572	
18	Il principe abusivo	**IT**	2 386 425			2 380 475
19	About Time	**GB**	2 298 565	10 918	78 934	97 281
20	Philomena	**GB/US/FR**	2 215 434		6 633	444 226
21	Kelebegin ruyasi	**TR**	2 185 007			
22	Selam	**TR**	2 155 721			
23	La cage dorée	**FR**	2 069 704		12 334	
24	Boule & Bill	**FR/BE/LU**	2 053 382			
25	Los amantes pasajeros	**ES**	2 032 450	3 711	16 711	310 003
26	9 mois ferme	**FR**	2 016 500			
27	Les garçons et Guillaume, à table!	**FR/BE**	1 979 986			
28	Eyjafjallajökull	**FR**	1 959 153			
29	Jappeloup	**FR/CA**	1 840 540			
30	Paulette	**FR**	1 746 882			58 722
31	La migliore offerta	**IT**	1 718 879		10 811	1 520 043
32	La grande bellezza	**IT/FR**	1 714 459			1 108 859
33	Les gamins	**FR**	1 697 892	680		
34	Cloud Atlas ❼	**DE/US**	1 639 641	2 077		579 651
35	La vie d'Adèle	**FR/BE/ES**	1 605 073	1 039	7 373	245 092
36	20 ans d'écart	**FR**	1 567 852	4 666	11 451	66 197
37	The World's End	**GB/US/JP**	1 566 593			44 983
38	Hükümet kadin 2	**TR**	1 547 854			
39	Romantik Komedi 2: Bekarliga Veda	**TR**	1 525 871			
40	Diana	**GB/FR/SE/BE**	1 471 293	34 893	30 220	188 655
41	Hükümet kadin	**TR**	1 423 677			
42	Benim dünyam	**TR**	1 405 495			
43	Benvenuto Presidente!	**IT**	1 383 987			1 383 987
44	Night Train to Lisbon	**DE/CH/PT**	1 368 414		6 840	130 816
45	Colpi di fortuna	**IT**	1 333 256			1 321 499
46	Justin and the Knights of Valour	**ES**	1 319 266	15 415	17 273	63 477
47	Alceste à bicyclette	**FR**	1 276 474		1 333	61 130
48	Fünf Freunde 2	**DE**	1 275 436			
49	Sur le chemin de l'école	**FR/CN/ZA/BR/CO**	1 264 610			106 638
50	Frau Ella	**DE**	1 244 068			
	Source			CBS	NFO	ANICA / SIAE

❶ 'inc' refers to films produced in Europe with US investment.
❷ Including - at least partial data - from AT, BE, BG, CH, CZ, DE, DK, EE, ES, FI, FR, GB/IE, GR, HR, HU, IT, LT, ME, NL, NO, PL, PT, RO, RU, SE, SI, SK, TR.
❸ Admissions estimated based on the division of GBO by the average ticket price.
❹ 477 172 admissions in 2012.
❺ 741 397 admissions in 2012.

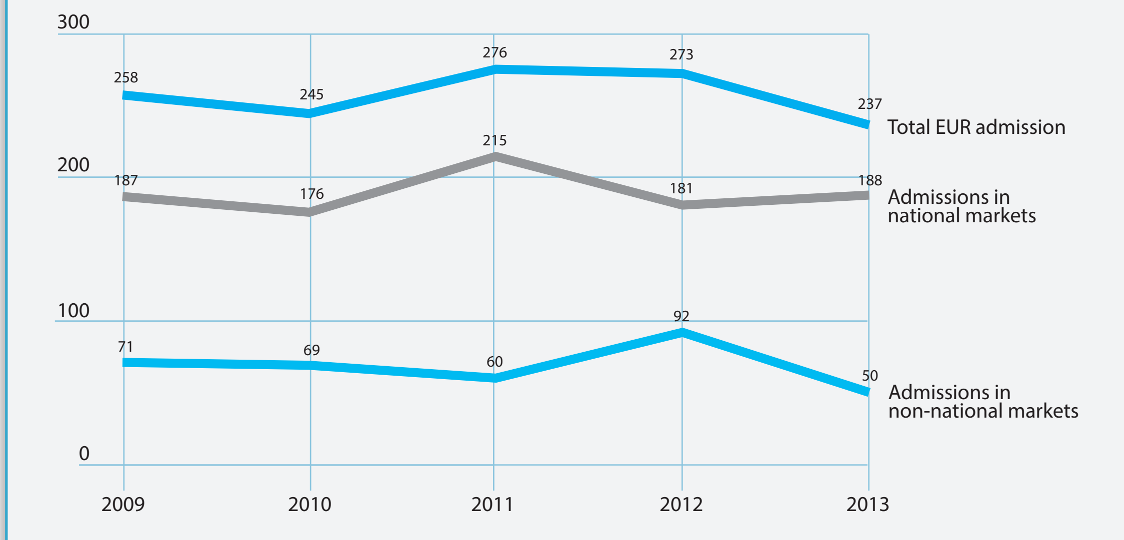
NL	NO	PL	PT	RO	RU	SE	TR
274 190	164 892	229 098	154 886	32 687		194 125	86 647
		39 915			6 200 000		
53 170	24 262	236 946	61 929	35 320		38 738	37 611
191 696	71 370	502 232	223 934	39 199		21 555	19 954
					4 200 000		
34 604							4 072 898
	96						3 842 479
					3 705 258		
					3 267 525		
24 192	507						2 853 628
38 179	7 752	47 126	13 289			34 729	2 654
82 731	12 776	179 557	38 158	35 614		18 639	24 016
125 055	17 397	167 770	48 459	43 135		22 455	68 089
	23 778					51 518	
10 152	310						2 158 938
4 815							2 145 545
			757 594				
14 763	1 972	78 299	22 822	6 820		12 516	16 023
		13 897	67 929				
		80 281	3 878	9 905			
136 628	5 856						
		17 312					
24 211	11 610	27 005	11 980	8 032		33 399	1 853
60 023	10 351	25 941	11 239	4 337		9 186	9 758
		46 355					17 290
11 325	9 993					5 976	
11 297	296						1 508 326
6 874							1 507 603
23 370	4 361	175 478	66 783	20 142		39 334	39 974
4 762	232						1 402 253
7 334	135					27	1 378 834
109 820			58 903				
53 714		157 396	51 214	44 580			
7 737			1 900			6 440	
MaccsBox - NVB & NVF	F&K	boxoffice.pl	ICA	CNC	Nevafilm / RFB / OBS	SFI	ANTRAKT

6 825 886 admissions in 2012.
7 4 905 431 admissions in 2012.

➥ European Audiovisual Observatory

G.7.7 Admissions to European films in national and non-national European markets

2009-2013 In millions.

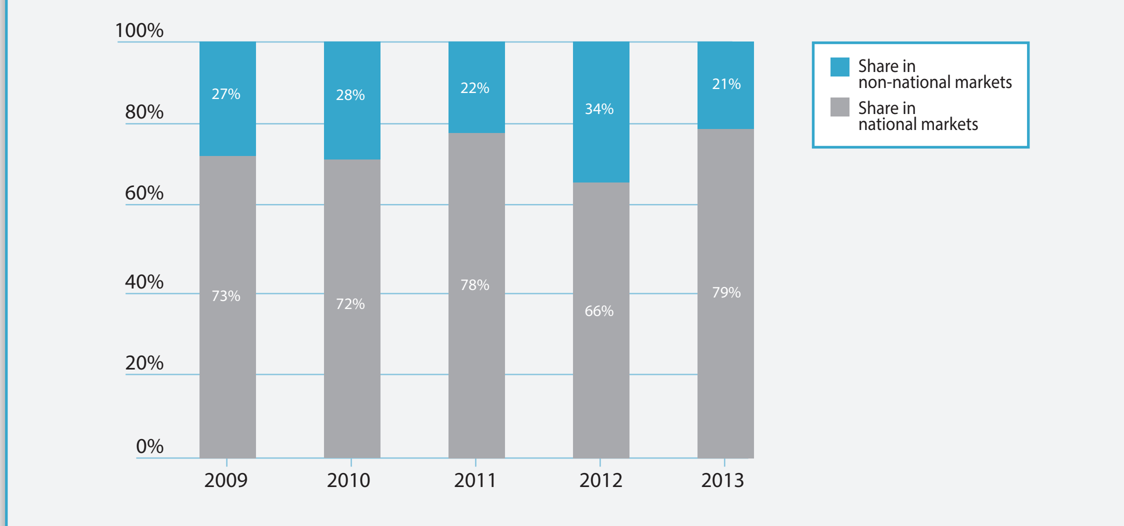


2009-2013 In millions.

European Audiovisual Observatory

G.7.8 Share of admissions to European films in national and non-national European markets

2009-2013 In millions.



2009-2013 In millions.

European Audiovisual Observatory

T.7.22

National market share

2009-2013 Percentage share of cinema admissions for national films.

Country	2009	2010	2011	2012	2013	*2013/12*	Sources
AL	~	~	~	~	~	–	
AT (1)	7.7	5.1	3.6	3.6	4.2	***16.7%***	OFI
BA	~	~	0.0	0.6	1.0	***66.7%***	SFF
BE	9.3	5.4	~	~	12.9	–	MFB / OBS
BG (1)	~	~	14.2	6.0	0.9	***-85.0%***	OBS LUMIERE after NFC
CH	3.4	5.4	4.3	4.8	6.2	***28.6%***	OFC
CY	~	~	0.2	~	0.1	–	MEC
CZ (1)	25.6	34.8	28.5	24.3	24.2	***-0.4%***	Czec Cinema Fund, Min.Cult.
DE (1)	27.4	16.8	21.8	18.1	26.2	***44.8%***	SPIO / FFA
DK	17.0	22.3	27.1	28.7	14.0	***-51.2%***	DFI
EE (1)	2.0	2.0	7.0	7.6	5.9	***-22.4%***	EFSA
ES (1)	15.4	12.7	15.8	19.3	14.0	***-27.8%***	ICAA
FI	14.5	27.5	17.2	28.1	23.0	***-18.2%***	FFF
FR (1)	36.8	35.7	40.9	40.3	33.8	***-16.1%***	CNC
GB (1) (2)	16.7	24.0	36.2	31.9	22.1	***-30.7%***	BFI
GR	~	~	10.4	6.9	7.2	***5.1%***	OBS / MDH
HR (1)	1.6	0.8	3.3	8.6	11.1	***28.9%***	HAVC
HU (1)	12.2	7.2	~	1.9	1.5	***-21.1%***	NFO / OBS LUMIERE after NFO (12, 13)
IE (1) (2)	0.3	1.1	4.0	1.5	0.9	***-37.9%***	IFB
IS (2)	7.1	7.4	8.5	9.1	3.1	***-65.9%***	HI
IT (1)	23.4	29.3	35.6	25.2	30.5	***21.0%***	ANICA/Cinetel
LI	~	~	~	~	~	–	MS / OFS
LT (1)	1.1	3.4	9.7	2.8	16.5	***480.6%***	Statistics Lithuania / LFC
LU (1)	~	~	1.2	3.2	3.6	***15.6%***	FLEC
LV (1)	4.3	6.9	4.5	4.1	4.6	***10.1%***	NFC
ME	~	~	~	~	~	–	
MK			13.9	27.1	~	–	SSO
MT	~	~	~	~	~	–	
NL (1)	17.4	15.9	22.3	15.8	20.6	***30.0%***	NFF
NO	20.6	23.3	24.5	17.9	22.8	***27.4%***	NFI / Film og Kino
PL (1)	21.5	14.4	31.3	19.0	20.4	***6.9%***	PISF
PT (1)	2.7	1.9	0.7	5.3	3.4	***-36.1%***	ICA
RO (1)	2.3	2.5	1.4	3.6	2.8	***-20.2%***	CNC
RU (1) (3)	24.5	15.8	17.9	16.1	18.4	***14.1%***	Nevafilm/RFB
SE	32.7	20.8	19.8	21.8	24.8	***13.8%***	SFI
SI (1)	1.9	6.7	4.2	4.8	10.9	***125.1%***	SFC
SK (1)	12.4	2.2	10.1	3.1	4.4	***43.0%***	SKFI
TR	50.9	52.9	50.2	46.5	58.0	***24.8%***	ANTRAKT
EU 20 *est.* (4) (6)	**14.7**	**14.6**	**17.2**	**15.1**	**15.2**	***0.2%***	OBS
EUR 26 *est.* (5) (6)	**15.6**	**15.3**	**17.4**	**15.3**	**15.7**	***2.6%***	OBS
US & CA	91.8	92.3	91.4	91.1	93.9	***3.1%***	MPAA
CN (2)	56.6	56.3	53.6	48.5	58.70	***21.0%***	CMM Intelligence after GAPPRFT
JP	56.9	53.6	54.9	65.7	60.60	***-7.8%***	EIREN

(1) Includes minority co-productions.
(2) Market share by GBO.
(3) Refers only to Russia, not to the CIS.
(4) EU20 = Average national market share in EU countries for which data are available each year of the series.
(5) EUR26 = Average national market share in EUR countries for which data are available each year of the series.
(6) Unweighted average of country percentages.

➡ European Audiovisual Observatory

T.7.23

Non-national European film market share

2009-2013 Percentage share of admissions for European films other than national films.

Country	2009	2010	2011	2012	*prov.* 2013	Sources
AL	~	~	~			~
AT	20.23	15.30	20.30	29.00	22.24	OFI
BA	~	~	~	13.7	~	~
BE	23.38	23.88	~	~	~	OBS LUMIERE
BG	~	~	10.21	13.42	5.06	OBS LUMIERE
CH	26.40	21.34	28.61	34.35	24.19	OFC
CY	~	~	~	~	~	~
CZ	7.90	7.28	6.69	13.76	~	Min.Cult.
DE [1]	7.10	14.70	16.80	19.80	6.10	SPIO / FFA
DK	24.00	15.13	15.27	19.02	34.4	DKS
EE	11.00	12.85	11.00	18.47	~	EFSA
ES [1]	12.58	17.44	13.24	17.57	9.99	ICAA
FI	17.15	5.95	17.67	13.87	~	FFF
FR	9.79	14.82	10.74	12.29	7.29	CNC
GB [2]	1.20	2.10	1.70	4.80	3.00	BFI
GR	~	~	12.22	22.40	16.90	OBS LUMIERE after MDH
HR	~	~	16.03	15.11	7.76	OBS LUMIERE after HAVC
HU	9.82	12.50	12.71	15.55	9.85	OBS LUMIERE after NFO
IE	~	~	~		~	
IS	16.70	~	~	~	~	Statice
IT	11.50	9.70	13.77	17.14	9.90	ANICA
LI	43.80	44.60	~	~	~	MS/OFS
LT	11.94	12.55	10.30	14.36	13.22	Statistics Lithuania
LU	~	~	~			~
LV	16.70	10.60	10.2	17.87	10.31	NFC
ME	~	~	~			~
MK	~	~	~			~
MT	~	~	~			~
NL	15.10	9.20	13.81	19.30		NFF
NO	20.10	10.60	14.70	16.30	7.40	NFI/Film og Kino
PL	14.06	17.27	16.06	24.93	12.63	PISF
PT [3]	5.19	5.95	4.60	11.04	16.10	ICA
RO	5.90	8.20	5.38	8.88	~	CNC
RU [4]	7.30	11.00	8.83	3.70	~	Nevafilm / OBS
SE	10.30	13.93	14.57	17.90	8.83	SFI
SI	9.50	5.41	13.26	13.32	9.91	SFC
SK	~	~	~	5.57	~	SKFI
TR	5.82	7.80	6.09	8.23	3.18	OBS LUMIERE after Antrakt
EU 19 *est.* [5] [7]	**11.63**	**11.10**	**12.00**	**16.26**	**13.06**	OBS
EUR 23 *est.* [6] [7]	**12.20**	**11.37**	**12.45**	**16.15**	**12.50**	OBS
US & CA	6.99	6.50	~	~	~	MPAA
JP	~	~	~	~	~	~

[1] Based on non-national EU films.
[2] By GBO.
[3] Does not include EUR-US co-productions.
[4] Refers to the CIS until 2011 and to Russia from 2012.
[5] EU19 = average for EU members for which data available in each year.
[6] EUR23 = average for EUR countries for which data available in each year.
[7] Unweighted average of country percentages.

➥ European Audiovisual Observatory

T.7.24

US market share

2009-2013 Percentage share of admissions for US films.

Country	2009	2010	2011	2012	*prov.* 2013	*2013/12*	Sources
AL	~	~	~	~	~	~	
AT	73.7	80.2	76.7	68.6	73.23	***13.7%***	ÖFI
BA	~	~	~	85.7	~	~	
BE	66.2	70.2	~	~	~	~	OBS LUMIERE
BG	~	~	75.1	81.1	92.2	***13.7%***	OBS LUMIERE after NFC
CH	68.0	70.8	64.9	58.2	67.06	***15.2%***	OFC
CY	~	~	~	~	95.0		Ministry of Culture
CZ	65.0	56.8	63.8	60.4	64.7	***7.2%***	MCCR
DE	64.5	66.3	60.1	60.8	65.4	***7.6%***	SPIO / FFA
DK	54.7	59.8	56.2	51.1	42.8	***-16.2%***	DFI
EE	86.0	84.2	80.8	71.5	78.3	***9.6%***	EFSA
ES	70.8	69.2	69.0	59.7	69.7	***16.7%***	ICAA
FI	67.5	65.9	64.1	57.4	~	~	FFF
FR	49.7	47.6	45.9	42.7	54.2	***27.0%***	CNC
GB [1]	81.0	71.8	60.1	61.5	72.7	***18.2%***	BFI
GR	~	~	71.1	69.6	78.8	***13.2%***	OBS LUMIERE after MDH
HR	~	~	79.8	74.8	77.2	***3.1%***	OBS LUMIERE after HAC
HU	80.7	81.6	81.9	80.7	86.9	***7.6%***	OBS LUMIERE after NFO
IE	~	~	~	~	~	~	
IS	75.3	~	76.7	71.0	~	~	HI
IT	63.5	60.2	48.6	53.2	53.7	***0.9%***	ANICA/Cinetel
LI	34.1	28.9	~	~	~	~	MS/OFS
LT	85.4	83.5	77.0	79.5	69.3	***-12.9%***	Statistics Lithuania
LU	~	~	~	~	~		FLEC
LV	75.0	80.9	81.8	77.4	77.4	***0.0%***	NFC
ME	~	~	~	~	~	~	
MK	~	~	~	~	~	~	ROMSSO
MT	~	~	~	~	~	~	
NL	65.2	72.7	62.4	63.0	70.0	~	NFF
NO	58.3	65.1	58.7	63.2	68.9	***9.0%***	NFI/Film og Kino
PL	63.1	66.3	51.3	57.9	63.4	***9.5%***	PISF
PT [2]	63.3	73.0	78.1	73.3	71.6	***-2.4%***	ICA
RO	91.0	88.9	92.8	87.4	~	~	CNC
RU [3]	68.1	71.6	72.7	69.1	66.9	***-3.2%***	Nevafilm / OBS
SE	53.9	64.1	64.7	59.8	64.6	***8.1%***	SFI
SI	88.1	86.3	81.4	79.8	78.2	***-2.0%***	SFC
SK	~	~	75.2	72.8	~	~	SKFU
TR	42.4	39.4	43.5	41.6	37.9	***-8.8%***	OBS LUMIERE after Antrakt
EU 18 *est.* [4] [6]	**70.4**	**71.0**	**67.5**	**64.8**	**68.0**	***4.9%***	OBS
EUR 22 *est.* [5] [6]	**68.4**	**69.3**	**66.1**	**63.6**	**66.6**	***4.7%***	OBS

➥ European Audiovisual Observatory

1. By GBO.
2. Does not include EUR-US co-productions.
3. Refers to the CIS until 2011 and to Russia from 2012.
4. EU18 = average US market share in EU countries for which data are available each year of the series.
5. EUR22 = average US market share in EUR countries for which data are available each year of the series.
6. Unweighted average of country percentages.

T.7.25

ROW market share

2009-2013 Percentage share of admissions for films from the rest of the world.

Country	2009	2010	2011	2012	*prov.* 2013	*2013/12*	Sources
AL	~	~	~	~	~	~	
AT	0.87	0.30	0.70	0.70	1.15	***64.3%***	ÖFI
BA	~	~	~	~	~		
BE	1.10	0.59	~	~	~		OBS LUMIERE
BG	~	~	0.89	1.22	1.89	***54.9%***	OBS LUMIERE
CH	2.26	2.45	2.28	2.63	2.55	***-3.0%***	OFS
CY	~	~	~	~	~		
CZ	1.20	1.11	0.44	0.81	~		MCCR
DE 1	1.00	2.30	1.40	1.40	2.30	***64.3%***	SPIO / FFA
DK	1.00	2.83	1.50	1.21	8.80	***627.3%***	DKS
EE	0.90	0.96	1.22	1.80	~		EFSA
ES 1	0.79	0.74	1.94	3.27	6.19	***89.3%***	ICAA
FI	0.86	0.78	0.98	0.62	~		FFF
FR	3.67	1.74	2.50	4.67	3.58	***-23.3%***	CNC
GB 2	1.20	2.10	1.99	1.80	2.10	***16.7%***	BFI
GR			2.29	1.14	3.36	***195.2%***	OBS LUMIERE after MDH
HR			1.65	5.18	3.99	***-23.1%***	OBS LUMIERE after HAVC
HU	0.17	0.59	1.30	1.67	2.87	***71.9%***	OBS LUMIERE after NFO
IE							
IS	1.03	~	0.89	1.50			HI
IT	1.60	0.80	1.90	4.20	5.90	***40.5%***	ANICA
LI	22.00	26.60					MS/OFS
LT	1.56	0.70	3.00	3.27	1.02	***-68.8%***	Statistics Lithuania
LU	~	~	~	~	~		OBS
LV	4.00	1.60	4.49	0.25	8.37	***3199.2%***	NFC
ME							
MK							
MT							
NL	2.30	1.70	1.50	1.90	~		NFF
NO	1.00	1.00	2.10	2.60	0.90	***-65.4%***	NFI/Film og Kino
PL	1.32	2.07	2.22	1.12	4.05	***261.6%***	PISF
PT	0.39	0.13	0.80	0.35	1.80	***418.7%***	ICA
RO	0.80	0.20	0.42	0.17	~		CNC
RU 3	0.70	0.85	2.70	0.90	~		Nevafilm / OBS
SE	3.10	1.10	0.90	0.20	1.71	***755.0%***	SFI
SI	0.50	1.58	1.12	1.97	1.04	***-47.2%***	SFC
SK			0.70	1.53	~	~	SKFI
TR	1.50	0.80	0.47	3.29	3.18	***-3.3%***	Antrakt
EU 18 *est.* 4 6	**1.4**	**1.2**	**1.6**	**1.7**	**3.0**	***79.0%***	OBS
EUR 22 *est.* 5 6	**1.4**	**1.2**	**1.6**	**1.8**	**2.8**	***56.1%***	OBS

1 Non-EU European films included.
2 Market share by GBO.
3 Refers to the CIS until 2011 and to Russia from 2012.
4 EU18 = average RoW market share in EU countries for which data are available each year of the series.
5 EUR22 = average RoW market share in EUR countries for which data are available each year of the series.
6 Unweighted average of country percentages.

➡ European Audiovisual Observatory

CHAPTER
CHAPITRE
KAPITEL
8

Video

Vidéo

Video

Contents	**Sommaire**	***Inhalt***	

1
2
3
4
5
6
7
8

T.8.1 Number of households with DVD player

2009-2013 In millions.

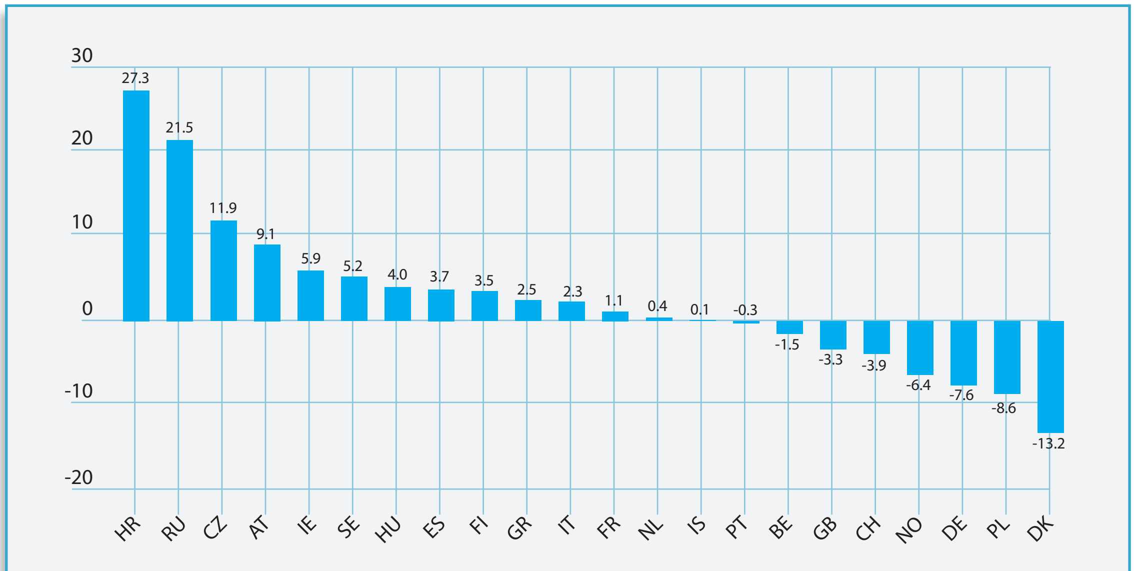
Country	2009	2010	2011	2012	2013	2013/12
AT	2.54	2.63	2.67	2.75	2.77	0.7%
BE	3.54	3.61	3.64	3.59	3.49	-3.0%
CH	3.04	3.05	3.06	3.01	2.92	-3.0%
CZ	2.57	2.62	2.80	2.92	2.88	-1.5%
DE	29.39	29.04	28.55	28.21	27.16	-3.7%
DK	2.32	2.37	2.36	2.10	2.01	-4.3%
ES	12.27	12.39	12.51	12.62	12.73	0.8%
FI	1.36	1.43	1.44	1.43	1.41	-1.4%
FR	19.32	19.49	19.58	19.56	19.53	-0.1%
GB	24.38	24.37	24.94	24.75	23.57	-4.8%
GR	2.06	2.09	2.12	2.12	2.11	-0.5%
HR	0.80	0.88	0.94	0.99	1.02	2.9%
HU	2.44	2.46	2.47	2.51	2.54	1.1%
IE	1.41	1.45	1.47	1.48	1.49	0.5%
IS	0.10	0.10	0.11	0.10	0.10	-9.2%
IT	21.84	22.20	22.32	22.24	22.35	0.5%
NL	6.20	6.21	6.25	5.67	6.23	9.8%
NO	1.91	1.98	2.05	1.89	1.79	-5.1%
PL	7.33	7.77	7.49	7.44	6.70	-9.9%
PT	3.21	3.28	3.26	3.24	3.20	-1.4%
RU	30.89	33.28	35.33	36.78	37.52	2.0%
SE	4.03	4.13	4.18	4.21	4.24	0.6%
EU 18 (1)	147.00	148.40	148.96	147.84	145.41	-1.6%
EUR 22	182.94	186.82	189.51	189.62	187.73	-1.0%
JP	25.29	23.85	22.47	20.36	18.72	-8.0%
US	93.92	94.40	94.62	94.71	94.74	0.0%

(1) Total for 18 EU members for which data are available.

IHS, European Audiovisual Observatory

G.8.1 Percentage growth in DVD households

2009-2013 In %.



2009-2013 In %.

IHS, European Audiovisual Observatory

T.8.2 DVD player penetration of TV households

2009-2013 In % of TV households.

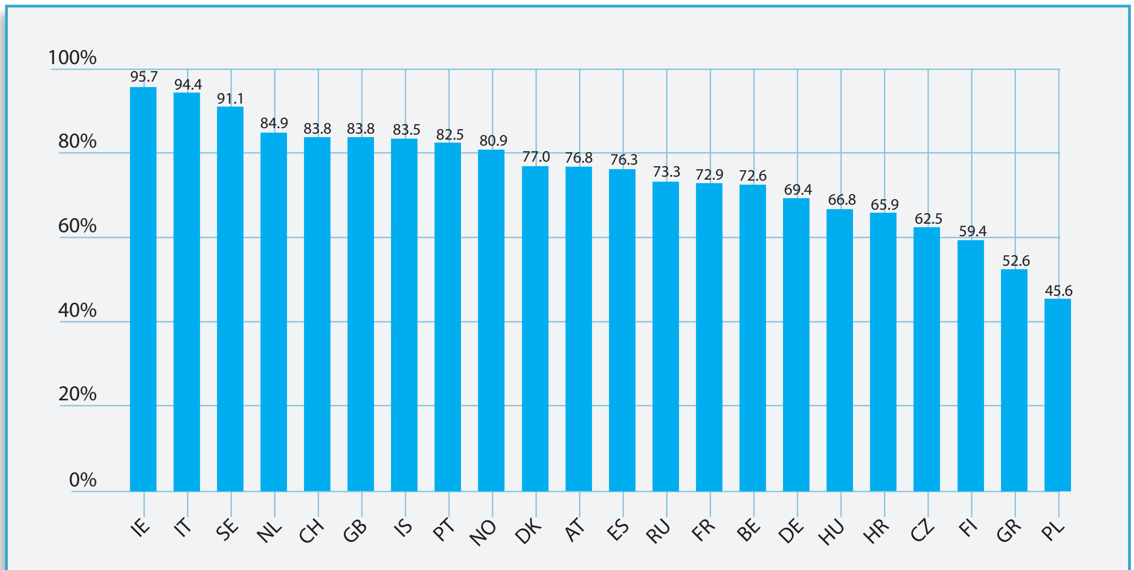
Country	2009	2010	2011	2012	2013	2013/12
AT	72.0	74.2	74.9	76.7	76.8	***0.2%***
BE	76.2	77.1	76.9	75.4	72.6	***-3.7%***
CH	89.7	89.4	89.1	86.9	83.8	***-3.6%***
CZ	57.8	58.1	61.4	63.7	62.5	***-1.9%***
DE	75.7	74.6	73.2	72.2	69.4	***-3.9%***
DK	90.8	92.4	91.3	80.9	77.0	***-4.7%***
ES	76.6	76.5	76.4	76.3	76.3	***0.0%***
FI	57.8	60.4	60.9	60.6	59.4	***-1.9%***
FR	74.6	74.6	74.3	73.6	72.9	***-1.0%***
GB	92.1	91.1	90.4	88.8	83.8	***-5.7%***
GR	53.7	54.0	54.0	53.4	52.6	***-1.6%***
HR	52.9	58.1	61.8	64.3	65.9	***2.4%***
HU	66.0	66.0	65.9	66.8	66.8	***0.1%***
IE	96.6	97.5	97.5	96.7	95.7	***-1.0%***
IS	82.0	82.0	87.8	86.0	83.5	***-2.9%***
IT	94.5	95.3	95.2	94.4	94.4	
NL	86.1	85.8	86.0	77.7	84.9	***9.3%***
NO	90.0	92.0	94.0	85.9	80.9	***-5.9%***
PL	51.7	54.2	51.7	51.0	45.6	***-10.5%***
PT	85.4	86.5	85.3	84.3	82.5	***-2.1%***
RU	62.8	67.0	70.4	72.6	73.3	***1.0%***
SE	89.8	91.2	91.3	91.3	91.1	***-0.2%***
Median EU 18 [1]	**76.0**	**75.5**	**75.6**	**75.8**	**74.6**	***-1.6%***
Median EUR 22	**76.4**	**76.8**	**76.6**	**76.5**	**76.6**	***0.1%***
JP	50.0	46.8	43.9	39.5	36.1	***-8.6%***
US	80.7	80.4	80.4	80.0	79.4	***-0.8%***

[1] Total for 18 EU members for which data are available.

➥ IHS, European Audiovisual Observatory

G.8.2 Percentage of TV households with DVD player

2013 In % of TV households.



2013 In % of TV households.

➥ European Audiovisual Observatory

T.8.3

Number of households with Blu-ray disc player

2009-2013 In millions.

Country	2009	2010	2011	2012	2013	2013/12
AT	0.08	0.14	0.25	0.38	0.52	35.5%
BE	0.06	0.14	0.33	0.65	0.96	48.2%
CH	0.11	0.24	0.46	0.78	1.15	47.9%
CZ	0.06	0.08	0.17	0.29	0.34	18.4%
DE	0.64	1.74	3.30	5.08	7.67	50.9%
DK	0.06	0.16	0.31	0.46	0.61	33.2%
ES	0.11	0.27	0.58	1.18	1.92	63.4%
FI	0.04	0.07	0.16	0.28	0.42	49.9%
FR	0.39	0.97	2.30	4.29	5.60	30.7%
GB	0.99	2.06	3.35	4.79	7.11	48.3%
GR	0.03	0.24	0.48	0.78	1.03	32.0%
HR	0.00	0.00	0.04	0.08	0.15	83.7%
HU	0.02	0.09	0.15	0.23	0.36	55.6%
IE	0.03	0.05	0.11	0.13	0.18	39.4%
IS	0.00	0.00	0.03	0.05	0.06	11.8%
IT	0.11	0.40	1.38	2.62	4.38	67.0%
NL	0.15	0.33	0.54	0.72	1.17	61.8%
NO	0.12	0.25	0.44	0.64	0.83	29.6%
PL	0.09	0.15	0.35	0.45	1.43	218.7%
PT	0.06	0.12	0.23	0.38	0.59	56.1%
RU	0.03	0.41	1.50	3.48	6.13	76.0%
SE	0.11	0.25	0.42	0.62	0.80	29.2%
EU 18 [1]	3.02	7.27	14.43	23.40	35.23	50.5%
EUR 22	3.28	8.17	16.85	28.36	43.40	53.1%
JP	4.23	8.94	15.05	17.99	20.73	15.2%
US	8.47	17.67	29.42	42.92	55.32	28.9%

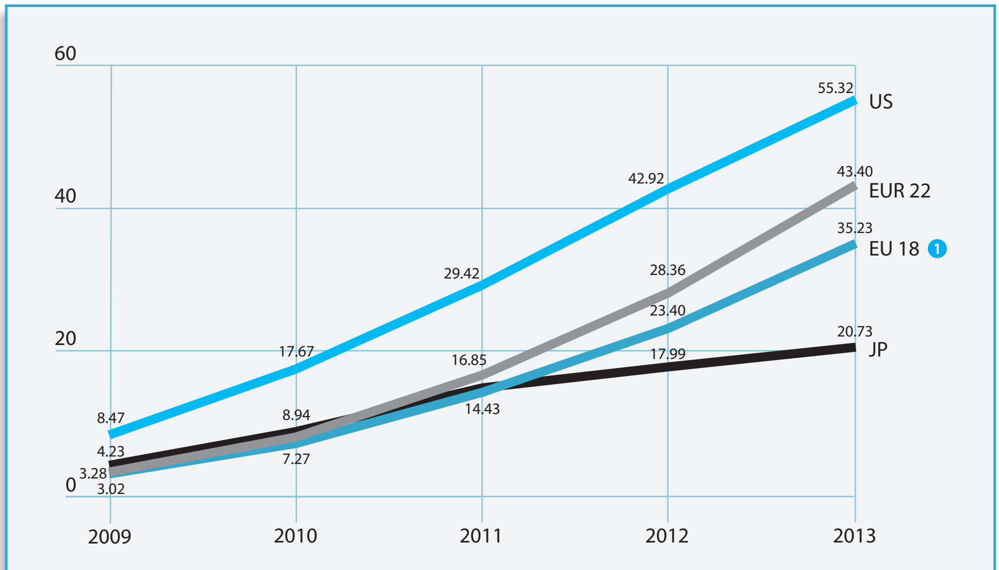
[1] Total for 18 EU members for which data are available.

➥ IHS, European Audiovisual Observatory

G.8.3

Number of households with Blu-ray disc player

2009-2013 In millions.



2009-2013 In millions.

[1] Total for 18 EU members for which data are available.

➥ IHS, European Audiovisual Observatory

T.8.4 Blu-ray disc player penetration of TV households

2009-2013 In % of TV households.

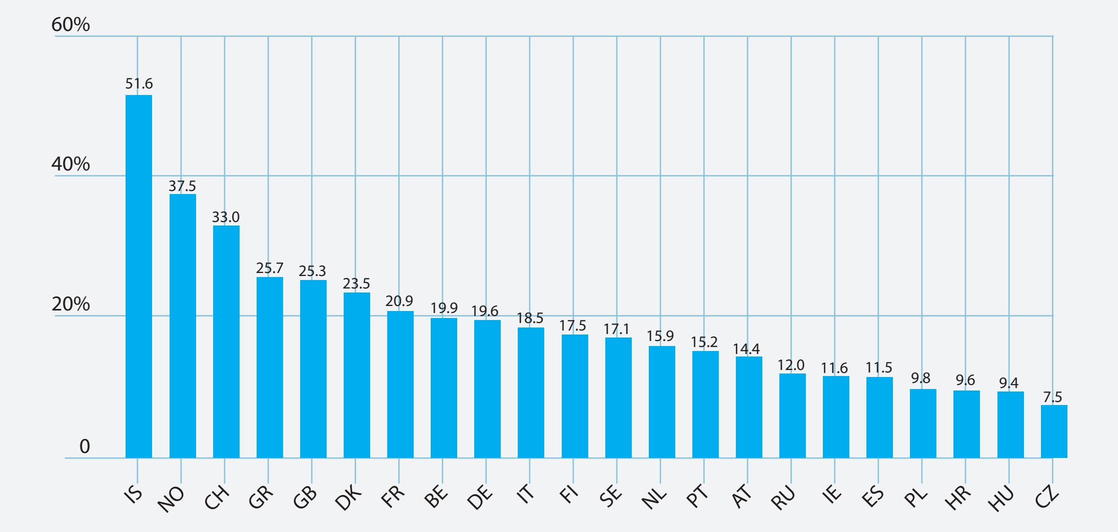
Country	2009	2010	2011	2012	2013	*2013/12*
AT	2.4	3.9	7.1	10.7	14.4	***34.8%***
BE	1.3	3.1	6.9	13.5	19.9	***47.1%***
CH	3.2	7.0	13.3	22.5	33.0	***47.1%***
CZ	1.3	1.8	3.7	6.3	7.5	***17.9%***
DE	1.6	4.5	8.5	13.0	19.6	***50.6%***
DK	2.5	6.3	11.8	17.7	23.5	***32.6%***
ES	0.7	1.7	3.5	7.1	11.5	***62.0%***
FI	1.8	3.0	6.9	11.7	17.5	***49.1%***
FR	1.5	3.7	8.7	16.1	20.9	***29.6%***
GB	3.7	7.7	12.2	17.2	25.3	***46.9%***
GR	0.7	6.1	12.1	19.7	25.7	***30.6%***
HR	0.0	0.3	2.3	5.2	9.6	***82.8%***
HU	0.6	2.5	4.0	6.1	9.4	***54.1%***
IE	1.8	3.1	7.3	8.5	11.6	***37.3%***
IS	2.1	2.5	28.0	43.1	51.6	***19.6%***
IT	0.5	1.7	5.9	11.1	18.5	***66.2%***
NL	2.0	4.6	7.4	9.9	15.9	***61.1%***
NO	5.7	11.6	20.2	29.2	37.5	***28.6%***
PL	0.6	1.0	2.4	3.1	9.8	***216.5%***
PT	1.5	3.2	5.9	9.8	15.2	***55.0%***
RU	0.1	0.8	3.0	6.9	12.0	***74.3%***
SE	2.4	5.6	9.2	13.4	17.1	***28.1%***
Median EU 18 (1)	**1.5**	**3.2**	**7.0**	**10.9**	**16.5**	***51.5%***
Median EUR 22	**1.6**	**3.2**	**7.2**	**11.4**	**17.3**	***51.4%***
JP	8.4	17.6	29.4	34.9	40.0	***14.5%***
US	7.3	15.0	25.0	36.3	46.4	***27.8%***

(1) Total for 18 EU members for which data are available.

IHS, European Audiovisual Observatory

G.8.4 Percentage of TV households with Blu-ray disc player

2013 In % of TV households.



2013 In % of TV households.

European Audiovisual Observatory

T.8.5 DVD retail turnover

2009-2013 In EUR million. Includes VAT/sales tax.

Country	2009	2010	2011	2012	2013	2013/12
AT	140.1	133.5	125.5	114.7	103.5	-9.7%
BE	217.0	189.5	166.1	148.2	129.4	-12.7%
CH	183.9	186.1	167.4	132.3	112.1	-15.2%
CZ	8.9	10.9	11.2	9.9	8.3	-16.3%
DE	1 257.8	1 189.0	1 127.0	1 019.0	983.4	-3.5%
DK	184.6	152.9	131.2	114.3	86.9	-24.0%
ES	249.2	204.5	150.0	127.6	105.8	-17.1%
FI	97.7	109.4	98.6	83.0	71.1	-14.4%
FR	1 277.1	1 211.9	1 048.8	892.6	724.2	-18.9%
GB	2 054.2	1 910.9	1 756.9	1 620.6	1 396.1	-13.9%
GR	6.2	5.0	4.3	3.6	2.9	-18.5%
HR	4.2	3.1	2.5	2.4	2.3	-5.0%
HU	36.2	32.8	29.8	26.2	22.4	-14.6%
IE	147.9	113.2	97.6	83.7	71.0	-15.2%
IS	7.0	7.0	5.8	4.6	3.4	-26.7%
IT	320.6	295.3	232.1	191.6	171.5	-10.5%
NL	323.5	280.9	245.8	187.6	143.6	-23.5%
NO	265.7	245.5	209.0	179.2	106.6	-40.5%
PL	57.3	55.6	47.5	44.7	39.3	-12.0%
PT	58.8	46.1	36.6	28.5	25.3	-11.3%
RU	240.0	240.6	193.8	161.7	113.5	-29.8%
SE	250.1	235.0	200.0	169.8	127.7	-24.8%
EU 18 [1]	6 691.4	6 179.6	5 511.5	4 868.1	4 214.6	-13.4%
EUR 22	7 388.0	6 858.8	6 087.6	5 345.9	4 550.3	-14.9%
JP	1 657.4	1 746.9	1 618.5	1 604.2	1 103.6	-31.2%
US	7 425.8	6 570.7	5 133.2	4 982.1	4 165.6	-16.4%

[1] Total for 18 EU members for which data are available.

IHS, European Audiovisual Observatory

T.8.6 DVD rental turnover

2009-2013 In EUR million. Includes VAT/sales tax.

Country	2009	2010	2011	2012	2013	2013/12
AT	11.7	10.9	9.4	8.8	7.7	-12.2%
BE	22.2	18.7	11.4	9.4	9.1	-2.8%
CH	8.8	6.4	6.9	6.1	5.0	-18.1%
CZ	0.2	0.1	0.1	0.0	0.0	-7.9%
DE	245.9	228.6	203.6	184.3	170.1	-7.7%
DK	42.7	36.4	28.3	22.5	18.3	-18.8%
ES	126.1	101.6	75.3	59.4	38.5	-35.2%
FI	27.2	25.5	22.9	21.2	18.8	-11.4%
FR	56.9	42.1	31.7	21.3	19.5	-8.6%
GB	298.7	289.4	260.2	215.6	129.8	-39.8%
GR	6.3	2.5	2.1	1.8	1.5	-18.0%
HR	3.9	2.5	1.5	0.4	0.3	-39.7%
HU	1.7	1.5	1.2	1.0	0.8	-20.5%
IE	61.8	53.3	50.7	45.8	37.0	-19.0%
IS	4.6	4.4	3.7	3.0	2.2	-24.4%
IT	115.9	85.2	69.3	45.3	38.4	-15.3%
NL	37.1	28.5	18.1	11.1	8.3	-25.3%
NO	32.3	32.8	31.9	22.0	7.0	-68.1%
PL	2.4	2.3	1.6	1.6	1.3	-16.0%
PT	25.1	21.8	18.4	13.2	10.2	-23.0%
RU	~	~	~	~	~	~
SE	68.8	73.1	69.7	59.6	53.7	-9.9%
EU 18 [1]	1 154.5	1 024.0	875.5	722.3	563.2	-22.0%
EUR 21	1 200.2	1 067.6	918.1	753.4	577.5	-23.3%
JP	2 236.3	2 415.8	2 447.4	2 312.7	1 669.1	-27.8%
US	5 404.5	5 327.8	4 148.6	3 405.1	2 873.9	-15.6%

[1] Total for 18 EU members for which data are available.

IHS, European Audiovisual Observatory

T.8.7 Blu-ray disc retail turnover

2009-2013 In EUR million. Includes VAT/sales tax.

Country	2009	2010	2011	2012	2013	2013/12
AT	12.5	20.8	26.5	33.4	37.3	11.8%
BE	11.5	16.1	21.8	24.4	26.0	6.6%
CH	13.7	26.4	39.2	43.3	44.4	2.6%
CZ	0.7	1.5	2.3	2.7	2.9	6.7%
DE	118.6	192.8	268.0	343.0	410.2	19.6%
DK	5.1	15.4	18.5	17.3	14.7	-15.1%
ES	21.0	32.3	34.8	36.0	33.8	-6.2%
FI	5.6	10.9	14.7	16.2	17.1	5.4%
FR	107.3	173.4	202.9	223.7	204.9	-8.4%
GB	151.2	232.4	256.5	282.4	296.4	5.0%
GR	0.6	1.0	1.5	1.8	1.8	5.4%
HR	0.0	0.2	0.3	0.3	0.4	13.3%
HU	0.6	3.2	5.1	6.4	7.4	14.8%
IE	4.6	6.4	6.1	5.3	5.3	-1.3%
IS	0.0	0.1	0.2	0.3	0.4	11.4%
IT	23.1	40.2	48.9	48.0	44.0	-8.3%
NL	19.0	28.7	36.2	36.9	28.9	-21.7%
NO	22.1	29.8	38.4	44.1	30.5	-30.8%
PL	3.0	5.0	5.5	6.4	6.5	1.4%
PT	4.3	5.8	5.9	5.6	6.0	7.3%
RU	10.2	24.5	27.2	32.6	31.8	-2.6%
SE	10.3	20.5	24.2	28.5	26.2	-8.3%
EU 18 (1)	499.1	806.6	979.6	1 118.4	1 169.7	4.6%
EUR 22	545.1	887.5	1 084.7	1 238.8	1 276.8	3.1%
JP	152.0	355.7	510.6	655.8	667.6	1.8%
US	802.7	1 317.1	1 480.2	1 788.2	1 775.7	-0.7%

(1) Total for 18 EU members for which data are available.

➥ IHS, European Audiovisual Observatory

T.8.8 Blu-ray disc rental turnover

2009-2013 In EUR million. Includes VAT/sales tax.

Country	2009	2010	2011	2012	2013	2013/12
AT	0.6	1.1	2.1	2.9	3.6	24.1%
BE	0.2	1.1	0.9	0.7	0.6	-25.4%
CH	0.4	0.9	1.7	2.4	2.7	15.5%
CZ	0.0	0.0	0.0	0.0	0.0	-60.9%
DE	14.7	24.9	39.5	52.3	54.9	4.9%
DK	1.7	4.4	6.4	8.3	8.6	4.2%
ES	0.0	1.0	1.4	1.6	2.6	56.8%
FI	0.8	2.2	2.7	3.2	3.4	6.6%
FR	0.2	1.2	1.4	1.6	1.5	-4.8%
GB	19.4	34.3	41.4	57.6	44.0	-23.6%
GR	0.0	0.2	0.4	0.6	0.9	33.1%
HR	~	~	~	~	~	~
HU	~	~	~	~	~	~
IE	0.6	1.1	2.4	2.6	2.6	-0.4%
IS	0.1	0.1	0.9	1.6	2.1	35.8%
IT	0.5	4.7	4.8	6.8	7.7	14.4%
NL	0.6	1.4	1.1	0.7	0.6	-21.3%
NO	0.4	1.0	1.9	2.5	2.7	7.6%
PL	0.1	0.1	0.2	0.3	0.3	1.9%
PT	0.1	0.4	1.0	1.3	1.5	12.9%
RU	~	~	~	~	~	~
SE	1.8	5.7	7.8	9.9	12.6	27.1%
EU 16 (1)	41.4	83.9	113.5	150.5	145.2	-3.5%
EUR 19	42.3	85.9	118.1	156.9	152.8	-2.6%
JP	39.0	81.3	151.3	204.1	169.7	-16.9%
US	350.9	484.8	511.1	565.8	526.0	-7.0%

(1) Total for 16 EU members for which data are available.

➥ IHS, European Audiovisual Observatory

T.8.9 DVD retail transactions

2009-2013 In million units.

Country	2009	2010	2011	2012	2013	2013/12
AT	10.8	10.6	10.2	9.8	9.2	-6.0%
BE	17.6	15.5	13.8	12.3	10.9	-11.7%
CH	12.8	12.1	10.4	8.3	7.1	-13.6%
CZ	2.2	2.6	2.9	3.2	2.5	-22.4%
DE	106.5	103.2	101.2	89.4	87.8	-1.8%
DK	19.3	16.5	11.7	10.3	7.8	-24.5%
ES	19.9	16.0	12.8	10.8	8.7	-20.0%
FI	9.4	10.7	9.8	8.6	7.0	-18.5%
FR	89.3	86.8	76.6	71.5	60.7	-15.1%
GB	234.6	210.1	191.8	162.0	143.4	-11.5%
GR	0.4	0.3	0.3	0.3	0.2	-14.6%
HR	0.6	0.6	0.6	0.6	0.6	-3.0%
HU	6.4	6.1	5.7	5.3	4.7	-11.1%
IE	13.6	10.9	9.5	8.1	6.9	-14.5%
IS	0.7	0.7	0.6	0.5	0.4	-22.4%
IT	27.3	25.2	20.7	18.4	16.2	-11.9%
NL	31.0	26.2	24.9	18.0	13.6	-24.4%
NO	21.7	17.6	14.9	13.0	7.9	-39.8%
PL	8.5	7.7	6.9	6.7	6.3	-5.2%
PT	6.0	5.0	4.1	3.2	2.9	-10.0%
RU	75.0	68.3	61.0	47.2	36.0	-23.8%
SE	26.8	21.4	18.3	16.2	13.1	-19.0%
EU 18 (1)	630.1	575.2	521.5	454.7	402.4	-11.5%
EUR 22	740.4	674.0	608.4	523.7	453.8	-13.3%
JP	58.9	53.8	45.3	40.7	37.0	-9.2%
US	740.1	644.1	575.4	540.5	485.5	-10.2%

(1) Total for 18 EU members for which data are available.

IHS, European Audiovisual Observatory

T.8.10 DVD rental transactions

2009-2013 In million units.

Country	2009	2010	2011	2012	2013	2013/12
AT	4.2	3.9	3.3	3.2	2.8	-11.8%
BE	7.0	6.0	3.6	2.9	2.8	-4.6%
CH	2.1	1.4	1.3	1.2	1.0	-15.9%
CZ	0.1	0.1	0.1	0.0	0.0	-4.5%
DE	99.6	92.0	79.6	66.1	58.9	-10.9%
DK	9.5	8.2	6.5	5.1	4.1	-20.7%
ES	53.4	42.7	31.5	24.5	16.6	-32.3%
FI	8.3	7.6	6.9	6.4	5.8	-9.2%
FR	20.0	14.7	10.8	7.0	6.3	-9.5%
GB	91.9	83.2	80.7	68.4	38.1	-44.3%
GR	4.2	1.6	1.4	1.2	0.9	-18.4%
HR	2.5	1.6	1.0	0.3	0.2	-38.5%
HU	1.1	0.9	0.8	0.6	0.5	-19.7%
IE	13.2	11.4	10.9	9.7	7.7	-20.0%
IS	1.8	1.6	1.4	1.1	0.8	-22.8%
IT	42.8	31.9	28.9	19.3	16.4	-15.0%
NL	11.2	8.4	5.5	3.3	2.4	-26.5%
NO	8.2	7.6	7.3	4.8	1.5	-68.4%
PL	2.0	1.8	1.3	1.1	0.9	-15.0%
PT	9.2	8.1	6.8	4.9	3.9	-20.0%
RU	~	~	~	~	~	~
SE	23.9	22.5	20.7	16.4	13.7	-16.3%
EU 18 (1)	404.1	346.7	300.2	240.3	182.1	-24.2%
EUR 21	416.1	357.3	310.2	247.4	185.4	-25.0%
JP	1 269.0	1 307.6	1 319.9	1 216.1	1 139.0	-6.3%
US	2 424.8	2 444.6	2 057.5	1 600.0	1 392.6	-13.0%

(1) Total for 18 EU members for which data are available.

IHS, European Audiovisual Observatory

T.8.11 Blu-ray disc retail transactions

2009-2013 In million units.

Country	2009	2010	2011	2012	2013	2013/12
AT	0.6	1.2	1.7	2.3	2.7	17.6%
BE	0.5	0.8	1.2	1.5	1.7	15.6%
CH	0.6	1.2	1.8	2.1	2.3	9.3%
CZ	0.0	0.1	0.2	0.3	0.3	6.8%
DE	6.2	12.0	17.2	23.1	29.3	26.8%
DK	0.2	0.7	0.9	1.0	0.9	-6.9%
ES	0.9	1.6	2.0	2.2	2.4	6.0%
FI	0.3	0.5	0.8	1.0	1.1	12.7%
FR	5.3	8.1	9.9	11.1	10.2	-7.6%
GB	8.4	13.0	15.3	16.7	18.8	12.4%
GR	0.0	0.0	0.1	0.1	0.1	16.5%
HR	0.0	0.0	0.0	0.0	0.0	23.5%
HU	0.0	0.1	0.3	0.4	0.5	36.8%
IE	0.2	0.3	0.3	0.3	0.3	1.8%
IS	0.0	0.0	0.0	0.0	0.0	19.0%
IT	1.0	2.0	2.6	2.7	2.7	-0.9%
NL	0.9	1.5	2.3	2.4	1.9	-21.9%
NO	1.1	1.4	1.9	2.2	1.8	-15.1%
PL	0.1	0.2	0.3	0.4	0.4	22.0%
PT	0.2	0.3	0.3	0.3	0.4	9.5%
RU	0.5	1.5	2.1	2.7	2.9	7.9%
SE	0.6	1.2	1.4	1.8	1.9	4.2%
EU 18 (1)	25.3	43.7	56.8	67.5	75.6	12.0%
EUR 22	27.5	47.9	62.6	74.6	82.7	11.0%
JP	3.8	8.3	11.1	12.8	16.0	24.6%
US	43.1	75.7	100.2	119.1	124.1	4.2%

(1) Total for 18 EU members for which data are available.

IHS, European Audiovisual Observatory

T.8.12 Blu-ray disc rental transactions

2009-2013 In million units.

Country	2009	2010	2011	2012	2013	2013/12
AT	0.2	0.4	0.8	1.0	1.3	24.7%
BE	0.1	0.3	0.3	0.2	0.2	-26.4%
CH	0.1	0.2	0.3	0.5	0.5	18.6%
CZ	0.0	0.0	0.0	0.0	0.0	-59.4%
DE	5.6	9.7	15.9	18.9	18.2	-3.7%
DK	0.4	1.0	1.5	1.9	1.9	3.3%
ES	0.0	0.4	0.6	0.7	0.9	36.5%
FI	0.3	0.7	0.8	0.9	1.0	8.9%
FR	0.1	0.4	0.5	0.5	0.5	-5.7%
GB	5.9	9.8	12.8	18.4	12.8	-30.3%
GR	0.0	0.1	0.3	0.4	0.6	32.5%
HR	~	~	~	~	~	~
HU	~	~	~	~	~	~
IE	0.1	0.2	0.5	0.6	0.5	-1.3%
IS	0.0	0.0	0.3	0.6	0.8	38.5%
IT	0.1	1.3	1.3	1.9	2.1	14.0%
NL	0.2	0.4	0.3	0.2	0.2	-21.5%
NO	0.1	0.2	0.4	0.5	0.6	6.4%
PL	0.1	0.1	0.2	0.2	0.2	3.1%
PT	0.0	0.2	0.4	0.5	0.6	17.3%
RU	~	~	~	~	~	~
SE	0.6	1.6	2.0	2.5	2.9	15.7%
EU 16 (1)	13.6	26.7	38.1	48.8	43.9	-10.0%
EUR 19	13.8	27.1	39.2	50.3	45.8	-9.0%
JP	21.1	42.3	79.2	104.2	112.4	7.9%
US	150.0	211.6	232.3	236.1	222.3	-5.9%

(1) Total for 16 EU members for which data are available.

IHS, European Audiovisual Observatory

T.8.13 Average DVD retail price

2009-2013 In EUR. Includes VAT/sales tax.

Country	2009	2010	2011	2012	2013	2013/12
AT	13.0	12.6	12.3	11.8	11.3	-4.0%
BE	12.4	12.2	12.0	12.0	11.9	-1.2%
CH	14.4	15.3	16.1	16.0	15.7	-1.9%
CZ	4.0	4.2	3.8	3.1	3.3	7.9%
DE	11.8	11.5	11.1	11.4	11.2	-1.7%
DK	9.6	9.3	11.2	11.1	11.2	0.7%
ES	12.5	12.8	11.8	11.8	12.2	3.6%
FI	10.5	10.3	10.1	9.7	10.2	5.1%
FR	14.3	14.0	13.7	12.5	11.9	-4.4%
GB	8.8	9.1	9.2	10.0	9.7	-2.7%
GR	15.5	14.8	14.1	13.5	12.9	-4.6%
HR	6.8	5.5	4.3	4.2	4.1	-2.0%
HU	5.6	5.4	5.2	5.0	4.8	-4.0%
IE	10.9	10.4	10.3	10.3	10.3	-0.8%
IS	9.8	10.0	9.7	9.3	8.8	-5.5%
IT	11.8	11.7	11.2	10.4	10.6	1.6%
NL	10.4	10.7	9.9	10.4	10.5	1.2%
NO	12.2	13.9	14.0	13.7	13.6	-1.2%
PL	6.8	7.2	6.9	6.7	6.2	-7.2%
PT	9.7	9.2	9.0	8.9	8.7	-1.5%
RU	3.2	3.5	3.2	3.4	3.2	-7.8%
SE	9.3	11.0	11.0	10.5	9.7	-7.2%
EU 18 (1)	10.6	10.7	10.6	10.7	10.5	-2.2%
EUR 22	10.0	10.2	10.0	10.2	10.0	-1.8%
JP	28.1	32.5	35.7	39.4	29.8	-24.2%
US	10.0	10.2	8.9	9.2	8.6	-6.9%

(1) Total for 18 EU members for which data are available.

IHS, European Audiovisual Observatory

T.8.14 Average Blu-ray disc retail price

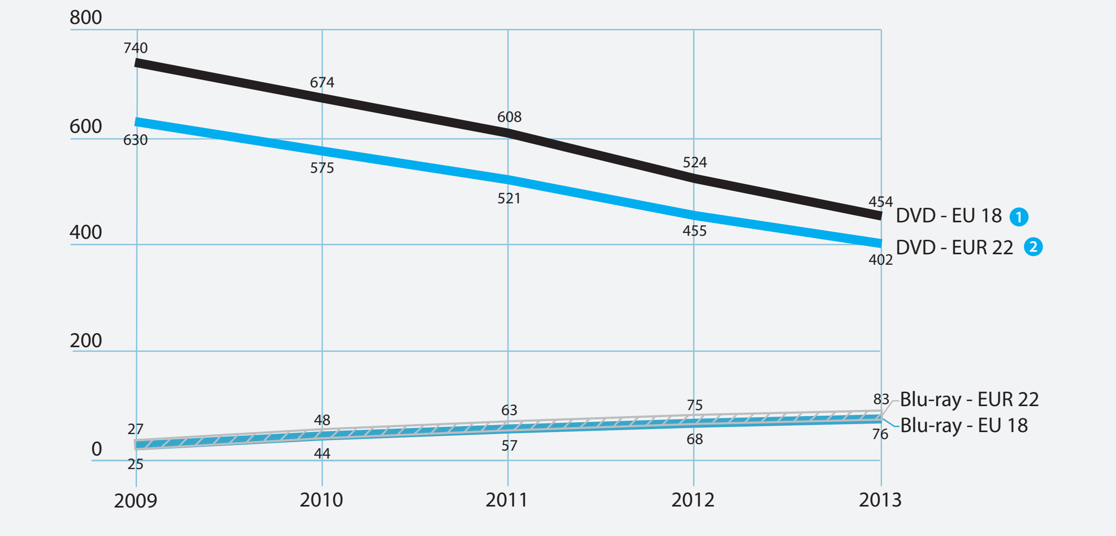
2009-2013 In EUR. Includes VAT/sales tax.

Country	2009	2010	2011	2012	2013	2013/12
AT	20.8	17.5	15.6	14.7	13.9	-5.0%
BE	24.0	20.1	18.0	16.6	15.3	-7.8%
CH	22.1	21.1	21.5	20.2	19.0	-6.1%
CZ	18.1	17.6	15.0	9.4	9.4	-0.1%
DE	19.2	16.0	15.6	14.8	14.0	-5.7%
DK	23.4	21.5	20.0	18.0	16.4	-8.8%
ES	23.6	20.6	17.4	16.0	14.2	-11.5%
FI	22.5	21.9	19.6	17.1	16.0	-6.5%
FR	20.3	21.3	20.5	20.2	20.0	-0.9%
GB	18.1	17.9	16.7	16.9	15.8	-6.6%
GR	23.6	21.3	19.3	17.4	15.8	-9.5%
HR	~	21.3	17.5	15.7	14.4	-8.3%
HU	19.1	23.8	20.0	16.5	13.8	-16.1%
IE	22.8	22.2	20.0	18.2	17.7	-3.1%
IS	16.8	15.1	14.7	13.7	12.8	-6.4%
IT	24.1	19.8	19.1	17.5	16.2	-7.5%
NL	22.1	18.9	15.4	15.6	15.6	0.3%
NO	20.9	21.3	20.5	20.5	16.7	-18.6%
PL	22.6	23.6	20.4	17.7	14.7	-16.9%
PT	23.5	21.0	17.7	16.4	16.1	-2.0%
RU	20.3	16.1	13.0	12.1	10.9	-9.7%
SE	17.1	17.1	17.0	15.4	13.6	-12.0%
EU 18 (1)	19.7	18.5	17.3	16.6	15.5	-6.6%
EUR 22	19.8	18.5	17.3	16.6	15.4	-7.1%
JP	39.8	43.0	45.9	51.2	41.8	-18.3%
US	18.6	17.4	14.8	15.0	14.3	-4.7%

(1) Total for 18 EU members for which data are available.

IHS, European Audiovisual Observatory

G.8.5 DVD and Blu-ray disc retail transactions
2009-2013 In million units.

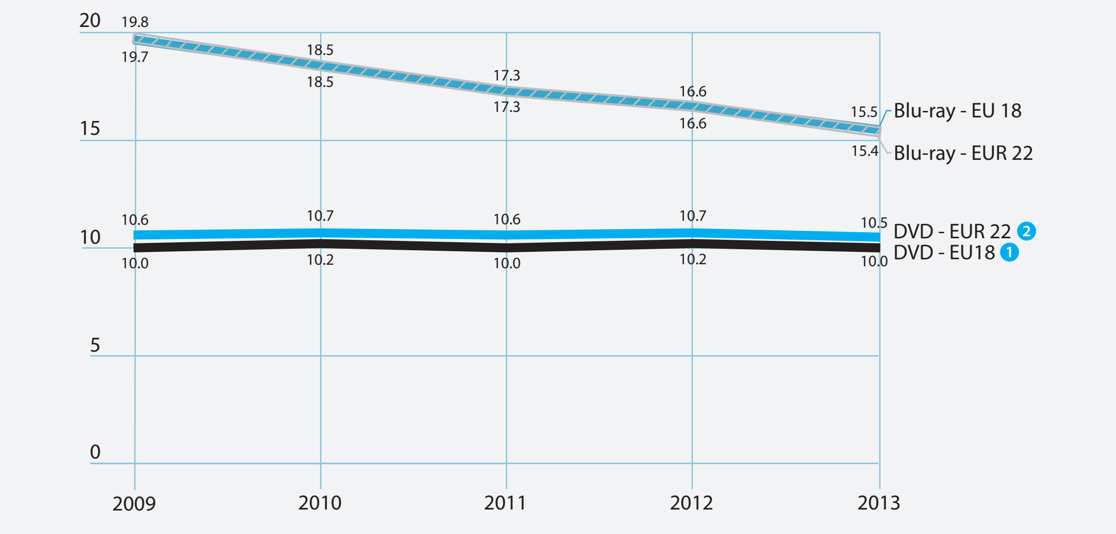


2009-2013 In millions of units.

1 AT, BE, CZ, DE, DK, ES, FI, FR, GB, GR, HR, HU, IE, IT, NL, PI, PT, SE.
2 EU 18 plus CH, IS, NO, RU.

➥ IHS, European Audiovisual Observatory

G.8.6 Average DVD and Blu-ray disc retail prices
2009-2013 In EUR per unit.



2009-2013 In EUR per unit.

1 AT, BE, CZ, DE, DK, ES, FI, FR, GB, GR, HR, HU, IE, IT, NL, PI, PT, SE.
2 EU 18 plus CH, IS, NO, RU.

➥ European Audiovisual Observatory

T.8.15 Average DVD rental price

2009-2013 In EUR. Includes VAT/sales tax.

Country	2009	2010	2011	2012	2013	2013/12
AT	2.8	2.8	2.8	2.8	2.8	-0.5%
BE	3.2	3.1	3.2	3.2	3.3	1.9%
CH	4.2	4.6	5.1	5.2	5.1	-2.6%
CZ	1.5	1.6	1.6	1.6	1.5	-3.6%
DE	2.5	2.5	2.6	2.8	2.9	3.6%
DK	4.5	4.4	4.4	4.4	4.5	2.4%
ES	2.4	2.4	2.4	2.4	2.3	-4.3%
FI	3.3	3.3	3.3	3.3	3.2	-2.4%
FR	2.8	2.9	2.9	3.1	3.1	1.1%
GB	3.3	3.5	3.2	3.1	3.4	8.1%
GR	1.5	1.5	1.5	1.5	1.5	0.5%
HR	1.6	1.6	1.4	1.4	1.3	-2.0%
HU	1.6	1.6	1.6	1.5	1.5	-1.0%
IE	4.7	4.7	4.7	4.7	4.8	1.3%
IS	2.6	2.8	2.7	2.7	2.7	-2.0%
IT	2.7	2.7	2.4	2.4	2.3	-0.4%
NL	3.3	3.4	3.3	3.4	3.4	1.6%
NO	3.9	4.3	4.4	4.6	4.6	1.1%
PL	1.2	1.3	1.3	1.5	1.5	-1.1%
PT	2.7	2.7	2.7	2.7	2.6	-3.7%
RU	~	~	~	~	~	~
SE	2.9	3.2	3.4	3.6	3.9	7.6%
EU 18 (1)	2.9	3.0	2.9	3.0	3.1	2.9%
EUR 21	2.9	3.0	3.0	3.0	3.1	2.3%
JP	1.8	1.8	1.9	1.9	1.5	-22.9%
US	2.2	2.2	2.0	2.1	2.1	-3.0%

(1) Total for 18 EU members for which data are available.

IHS, European Audiovisual Observatory

T.8.16 Average Blu-ray disc rental prices

2009-2013 In EUR. Includes VAT/sales tax.

Country	2009	2010	2011	2012	2013	2013/12
AT	2.8	2.8	2.8	2.8	2.8	-0.5%
BE	3.2	3.1	3.2	3.2	3.3	1.2%
CH	4.2	4.6	5.1	5.2	5.1	-2.6%
CZ	2.1	2.0	1.8	1.6	1.5	-3.7%
DE	2.6	2.6	2.5	2.8	3.0	8.9%
DK	4.5	4.4	4.4	4.4	4.4	0.9%
ES	2.4	2.4	2.4	2.4	2.8	14.8%
FI	3.3	3.3	3.4	3.4	3.3	-2.1%
FR	2.8	2.9	2.9	3.1	3.1	0.9%
GB	3.3	3.5	3.2	3.1	3.4	9.6%
GR	~	1.5	1.5	1.5	1.5	0.5%
HR	~	~	~	~	~	~
HU	~	~	~	~	~	~
IE	~	4.7	4.7	4.7	4.8	1.0%
IS	~	2.8	2.7	2.7	2.7	-2.0%
IT	3.6	3.7	3.6	3.6	3.6	0.3%
NL	3.3	3.4	3.3	3.4	3.4	0.3%
NO	4.4	4.9	5.0	4.6	4.6	1.1%
PL	1.2	1.3	1.3	1.5	1.5	-1.1%
PT	~	2.7	2.7	2.7	2.6	-3.7%
RU	~	~	~	~	~	~
SE	3.2	3.6	3.8	4.0	4.4	9.9%
EU 16 (1)	3.0	3.1	3.0	3.1	3.3	7.3%
EUR 19	3.1	3.2	3.0	3.1	3.3	7.0%
JP	1.9	1.9	1.9	2.0	1.5	-22.9%
US	2.3	2.3	2.2	2.4	2.4	-1.2%

(1) Total for 16 EU members for which data are available.

IHS, European Audiovisual Observatory

Sources

Sources

Quellen

Contents	**Sommaire**	***Inhalt***	

Sources

Sources

Quellen

Organisations which provided pan-European data for this volume

Organismes ayant fourni des données paneuropéennes pour ce volume

Organisationen, die mit gesamteuropäischen Angaben zu diesem Band beigetragen haben

EUROPEAN BROADCASTING UNION (EBU) http://www.ebu.ch

Media Intelligence Service (MIS)

The Media Intelligence Service (MIS) is the EBU unit responsible for carrying out primary research and analysis in the field of media with a multidimensional approach (political, economic, socio-cultural and technological) and an international perspective. In doing so, the MIS provides EBU departments and committees as well as EBU members with reliable market data, trustworthy analysis and relevant arguments that support their daily operations and their strategic planning.

The MIS is a point of reference for public service media, whether for television or radio trends, new media developments, market structure and concentration or public policy issues. Research results are published in reports, research notes and available online.

Manager of MIS:
Dr. Roberto Suárez Candel

Service d'Analyse Médias (SAM)

Le Service d'Analyse Médias (SAM) est l'unité de l'UER en charge de la collecte de données et de la production d'analyses dans le champ des médias. Il développe une approche multidimensionnelle (politique, économique, socioculturelle et technologique) dans une perspective internationale. Le SAM a vocation à mettre à disposition des départements, comités et membres de l'UER des informations fiables sur les marchés ainsi que des analyses et argumentations pertinentes à l'appui de leurs activités quotidiennes et de leur planification stratégique.

Le SAM représente un point de référence pour les médias de service public en ce qui concerne les tendances des marchés télévisuels et radiophoniques, le développement des nouveaux médias, la structure des marchés, leur concentration ou les questions de politique publique. Les résultats des recherches sont publiés sous la forme de rapports, notes de recherche et sont disponibles sur Internet.

Responsable du SAM :
Dr. Roberto Suárez Candel

Service Medienanalyse (SMA)

Der Service Medienanalyse (SMA) der Europäischen Rundfunkunion EBU ist jene Abteilung, die für Recherchen und Analysen im Bereich Medien zuständig ist. Diese Arbeit erfolgt unter dem Blickwinkel einer internationalen Perspektive und multidimensionalen Herangehensweise, die sowohl politische, wirtschaftliche, soziokulturelle als auch technologische Aspekte umfasst. Damit liefert der SMA sowohl den Abteilungen und Kommittees der EBU als auch deren Mitgliedern zuverlässige Daten und Analysen, anhand derer tägliche Arbeitsabläufe geplant und strategische Entscheidungen getroffen werden.

Der SMA ist ein Orientierungspunkt für öffentliche Sendeanstalten, sei es für Fernseh- oder Radiotrends, Entwicklungen im Bereich Neue Medien, Marktstrukturen und –konzentrationsprozesse oder politische Themen. Forschungsergebnisse werden in Form von diversen Berichten veröffentlicht und sind über das Internet verfügbar.

Manager des SMA:
Dr. Roberto Suárez Candel

IHS TECHNOLOGY https://technology.ihs.com/

IHS (NYSE: IHS) is the leading source of information, insight and analytics in critical areas that shape today's business landscape. Businesses and governments in more than 165 countries around the globe rely on the comprehensive content, expert independent analysis and flexible delivery methods of IHS to make high-impact decisions and develop strategies with speed and confidence.

The IHS Technology division is the unique combination of end-to-end market insight, world-leading analysts and proven research methodologies developed over many years at established brands (including Screen Digest). Leveraging proprietary market data, forecasts, and expert analysis, IHS Technology provides comprehensive research at every operational step of increasingly complex technology, media and telecommunications value chains, from strategy, planning and analysis to product design, market development and supply chain management.

IHS (NYSE:IHS) est la source leader d'information, d'intelligence et d'analyses dans les domaines critiques qui modèlent le paysage économique actuel. Les entreprises et les gouvernements de plus de 165 pays dans le monde se basent sur les contenus complets, les analyses indépendantes d'experts et les méthodes flexibles de distribution d'IHS pour prendre des décisions importantes et développer des stratégies rapidement et en confiance.

La division IHS Technology est la combinaison unique de compréhension des marchés finaux, d'analystes de réputation mondiale et de méthodologies de recherche éprouvées développées depuis de longues années par des marques établies (telle que Screen Digest). En tirant profit de données de marché d'élaboration propre, de prévisions et d'analyses d'experts, IHS Technology fournit des recherches complètes à chaque niveau opérationnel de technologies toujours plus complexes, de chaînes de valeur dans le domaine des médias et des télécommunications, de la stratégie, la planification et l'analyse jusqu'à la conception de produit, de développement du marché et de la gestion de la chaîne de valeur.

IHS (NYSE: IHS) ist die führende Informations- und Analysequelle in den wichtigsten Bereichen der heutigen Unternehmenslandschaft. Unternehmen und Regierungen in mehr als 165 Ländern weltweit vertrauen auf den umfassenden Inhalt, die unabhängigen Expertenanalysen und die flexible Datenbereitstellung von IHS zur effizienten Entscheidung und schnellen Entwicklung von Strategien.

Die IHS Technologieabteilung ist eine einzigartige Kombination ganzheitlicher Marktkenntnisse, weltführender Analysten und bewährter Forschungsmethoden, die über viele Jahre hinweg entwickelt und etabliert wurden (unter anderem bei Screen Digest). Unter Einsatz von eigenen Marktdaten, Prognosen und Expertenanalysen bietet IHS Technology umfassende Recherchen bei allen Arbeitsschritten unter Berücksichtigung zunehmend komplexer Technologien, Medien- und Telekommunikationswertschöpfungsketten, von Strategie, Planung und Analyse bis hin zu Produktdesign, Marktentwicklung und Supply Chain Management.

Sources

Organisations which provided pan-European data for this volume

continued

MAVISE http://mavise.obs.coe.int

The MAVISE database on television companies and channels in the European Union has been developed by the European Audiovisual Observatory under a contract with the European Commission's DG Communication (2007-2011). It was officially launched on 1 April 2008.

The enhancement of the database is an ongoing process. In particular, its coverage was extended to all 40 member states of the European Audiovisual Observatory. The expansion of MAVISE to include on-demand audiovisual services has been carried out in May 2013.

Some of the work collecting information on audiovisual services is carried out under contracts between the European Audiovisual Observatory and the European Commission (DG Communication and DG Connect). In connection with this work, the Observatory benefits from the co-operation of the European Platform of Regulatory Authorities (EPRA).

The European Commission owns the software, and the Observatory owns the design and the information contained in the database (with the exception of that communicated by its suppliers Bureau Van Dijk and Lyngemark Satellite).

The data collection work carried out by the Observatory has been as rigorous as possible but no claim is made to have set up a reference database with legal status.

Neither the European Audiovisual Observatory and the European Commission nor their staff provide any guarantees, either explicit or implicit, or assume any responsibility for the accuracy, completeness or use of any information contained in the database. References made to any particular service (including the websites referred to) do not constitute a recommendation or recognition by the European Audiovisual Observatory or the European Commission.

Sources

Organismes ayant fourni des données paneuropéennes pour ce volume

suite

La base MAVISE sur les entreprises et chaînes de télévision dans l'Union européenne et les pays candidats a été développée par l'Observatoire européen de l'audiovisuel dans le cadre d'un contrat avec la DG Communication de la Commission européenne (2007-2011). Elle a été officiellement lancée le 1er avril 2008.

L'enrichissement de la base est un processus constant. Celle-ci couvre à présent l'ensemble des 40 États membres de l'Observatoire européen de l'audiovisuel. L'élargissement de la base MAVISE aux services audiovisuels à la demande a été réalisé en mai 2013.

Une partie de la collecte de l'information sur les services audiovisuels est réalisée dans le cadre de contrats passés entre l'Observatoire européen de l'audiovisuel et la Commission européenne (DG Communication et DG Connect). Pour la collecte de l'information, l'Observatoire bénéficie de la collaboration de l'European Platform of Regulatory Authorities (EPRA).

La Commission européenne est propriétaire du logiciel. L'Observatoire est propriétaire du concept et des informations contenues dans la base (à l'exception de celles communiquées par ses fournisseurs : Bureau Van Dijk et Lyngemark Satellite).

La collecte menée par l'Observatoire est réalisée avec le plus de rigueur possible, mais n'a pas de prétention à établir une base de référence ayant valeur juridique.

Ni l'Observatoire européen de l'audiovisuel et la Commission européenne, ni les agents de ces organisations ne fournissent aucune garantie, explicite ou implicite, ni n'assument aucune responsabilité sur la précision, l'exhaustivité ou l'usage de toute information contenue dans la base. Les références faites à tout service particulier (y compris les sites web référencés) ne constituent pas une recommandation ou une reconnaissance par l'Observatoire européen de l'audiovisuel ou la Commission européenne.

Quellen

Organisationen, die mit gesamteuropäischen Angaben zu diesem Band beigetragen haben

Fortsetzung

Die Datenbank MAVISE, die Fernsehunternehmen und Fernsehdienste in der Europäischen Union und in den Beitrittskandidatenländern erfasst, wurde von der Europäischen Audiovisuellen Informationsstelle im Rahmen eines Vertrages mit der GD Kommunikation der Europäischen Kommission entwickelt (2007-2011). Sie wurde offiziell am 1. April 2008 gestartet.

Die Erweiterung der Datenbank ist ein kontinuierlicher Prozess, infolgedessen sich der Umfang auf alle 40 Mitgliedstaaten der Europäischen Audiovisuellen Informationsstelle erweitert hat. Die Erweiterung von MAVISE durch die Erfassung von audiovisuellen Abrufdiensten wurde im Mai 2013 vorgenommen.

Zum Teil erfolgt die Erfassung der Informationen über die audiovisuellen Dienste im Rahmen von Verträgen zwischen der Europäischen Audiovisuellen Informationsstelle und der Europäischen Kommission (GD Kommunikation und GD Connect). Bei der Erhebung der Daten kann die Informationsstelle auf die Zusammenarbeit mit der European Platform of Regulatory Authorities (EPRA) zählen.

Eigentümerin des Computerprogramms ist die Europäische Kommission, Eigentümerin des Konzepts und der in der Datenbank enthaltenen Informationen (mit Ausnahme derjenigen, die von den Dateninformanten Bureau Van Dijk und Lyngemark Satellite stammen) die Informationsstelle.

Die Informationsstelle erhebt die Daten so gründlich wie möglich, allerdings ohne den Anspruch, damit eine juristisch verbindliche Referenzdatenbank zu begründen.

Die Europäische Audiovisuelle Informationsstelle, die Europäische Kommission und die Mitarbeiter dieser Organisationen übernehmen weder explizit noch implizit irgendeine Gewähr und haften nicht für die Richtigkeit, Vollständigkeit oder die Nutzung sämtlicher in der Datenbank enthaltenen Informationen. Ein Verweis auf einen konkreten Dienst (einschließlich genannter Websites) stellt keine Empfehlung oder Anerkennung durch die Europäische Audiovisuelle Informationsstelle oder die Europäische Kommission dar.

Sources

Sources

Quellen

Organisations which provided pan-European data for this volume

continued

Organismes ayant fourni des données paneuropéennes pour ce volume

suite

Organisationen, die mit gesamteuropäischen Angaben zu diesem Band beigetragen haben

Fortsetzung

Warc http://www.warc.com

Warc is the most comprehensive marketing information service in the world. It is a trusted resource, recognised for the provision of the latest in-depth information and cutting-edge thinking.

Its unique online service is relied upon by the global marketing, advertising, media, research and academic communities. It provides authoritative forecasts of advertising expenditure for all major economies, used by researchers worldwide. Warc.com is the single best source of case studies, best practice guides, marketing intelligence, consumer insight, industry trends and latest news from around the world.

Alongside its website, Warc has two other areas of activity:

- Magazines and Journals: Warc publishes five highly respected magazines and market leading journals for people working in advertising, marketing, media and research: *Admap, Market Leader, International Journal of Advertising, Journal of Advertising Research* and *International Journal of Market Research.*
- Events: Warc organises a range of premium conferences and seminars covering topical issues of interest to marketing people across the globe.

Warc est le service d'information marketing le plus complet au monde. Il s'agit d'une ressource de confiance, connue pour fournir les informations détaillées les plus récentes ainsi que pour sa réflexion d'avant-garde.

Son service en ligne unique est utilisé par les communautés internationales du marketing, de la publicité, des médias, de la recherche et des universités. Ses prévisions des dépenses publicitaires de toutes les grandes économies, utilisées par les chercheurs du monde entier, font autorité. Warc.com est l'unique et meilleure source d'études de cas, de guides de bonnes pratiques, de veille stratégique, de connaissance des consommateurs, de tendances de l'industrie et d'actualités récentes provenant du monde entier.

Parallèlement à son site Web, Warc a deux autres domaines d'activité :

- Magazines et journaux : Warc publie cinq magazines et journaux très respectés, leaders sur le marché, ciblant les personnes travaillant dans la publicité, le marketing, les médias et la recherche : *Admap, Market Leader, International Journal of Advertising, Journal of Advertising Research* et *International Journal of Market Research.*
- Manifestations : Warc organise une série de conférences et séminaires de haut niveau sur des questions d'actualité qui intéressent les gens du marketing du monde entier.

Das Warc ist der weltweit umfassendste Dienst für Marketinginformationen. Als zuverlässige Quelle wird das Zentrum für seine immer aktuellen und fundierten Informationen sowie für seine präzisen Analysen weithin anerkannt.

Der einzigartige Onlinedienst des Warc wird rund um den Globus von Akteuren aus den Bereichen Marketing, Werbung, Medien sowie Forschung und Lehre genutzt. Er liefert zuverlässige – und weltweit von Forschern genutzte – Prognosen der Werbeausgaben aller großen Volkswirtschaften. Warc.com ist die beste Einzelquelle für Fallstudien, Best Practice Guides, Marketing Intelligence, Verbraucherverhalten, Industrietrends und die aktuellsten Nachrichten aus aller Welt.

Neben seiner Website hat das Warc noch zwei weitere Tätigkeitsschwerpunkte:

- Fachzeitschriften: Das Warc publiziert fünf hoch angesehene und marktführende Fachzeitschriften für Menschen, die in den Bereichen Werbung, Marketing, Medien und Forschung tätig sind: *Admap, Market Leader, International Journal of Advertising, Journal of Advertising Research* sowie *International Journal of Market Research.*
- Veranstaltungen: Das Warc organisiert eine Reihe von Premium-Konferenzen und Seminaren zu marketingrelevanten Themen für Interessenten aus aller Welt.

Rovi http://www.rovicorp.com/tvlistingsservice

ROVI is the premier pan-European supplier of TV listings data, serving the needs of print and web publishers as well TV channel networks and distributors.

ROVI Archives

ROVI provides customised historical data as far back as 1991 for tracking market trends and intellectual property rights of any TV programme rights holders, such as authors, composers, producers, directors, etc.

ROVI est le premier fournisseur paneuropéen d'informations sur les programmes TV qui collabore non seulement avec les guides papier et web, mais également avec les réseaux et distributeurs de chaînes de télévision.

Les archives de ROVI

ROVI fournit des données personnalisées dont la diffusion remonte à 1991, et ce dans le but d'analyser les tendances du marché mais également de suivre les droits de propriété intellectuelle de chacun des ayants droit tels que les auteurs, compositeurs, producteurs, réalisateurs, etc.

ROVI ist der größte europaweite Dienstleister für Fernsehprogramminformationen, der nicht nur mit TV-Zeitschriften und Online-Informationsdiensten zusammenarbeitet, sondern auch mit den Verbreitungsunternehmen und Fernsehveranstaltern selbst.

ROVI-Archiv

ROVI stellt individuell Daten über Sendungen seit 1991 zur Analyse von Markttrends, aber auch zur Rückverfolgbarkeit der Rechte am geistigen Eigentum durch die Rechteinhaber wie Autoren, Komponisten, Produzenten, Regisseure usw. bereit.

Abbreviations | Abréviations | *Abkürzungen*

List of abbreviations used in this volume

Liste des abréviations utilisées dans le présent volume

In diesem Band verwendete Abkürzungen

–	not applicable	ne s'applique pas	trifft nicht zu
~	not available	non communiqué	keine Angabe
adtv	private television company financed by advertising	entreprise privée de télévision financée par la publicité	werbefinanzierte private Fernsehunternehmen
ASO	Analogue Switch-Off	Passage de l'analogique au numérique	Umstellung auf digitales Fernsehen
AVMS	Audiovisual Media Service	Service de média audiovisuel	Audiovisuelle Mediendienste
BB	broadband	haut débit	Breitband
CATV	Cable Television	télévision par câble	Kabelfernsehen
DTH	direct-to-home	réception directe par satellite	direct-to-home
DTT	Digital terrestrial television	(=TNT)	(=DVB-T)
DVB-H	Digital Video Broadcasting - Handheld	Digital Video Broadcasting - Handheld	Digital Video Broadcasting - Handheld
DVB-T	(=DTT)	(=TNT)	Digital Video Broadcasting - Terrestrial
est.	estimate	estimation	Schätzung
hs	home shopping	téléachat	Homeshopping
IPTV	Internet Protocol Television (television through broadband)	Internet Protocol Television (télévision par réseaux large bande)	Internet Protocol Television (Fernsehen über Breitband)
ISP	Internet Service Provider	Fournisseurs d'accès à Internet (FAI)	Internet-Anbieter
p.m.	pro memoria	pour mémoire	pro memoria
MMDS	Microwave Multipoint Distribution System	Microwave Multipoint Distribution System	Microwave Multipoint Distribution System
packtv	packager/ aggregator of TV services	ensemblier/agrégateur de services TV	Anbieter von Programmpaketen
paytv	pay-TV (film premium)	télévision à péage (films premium)	Pay-TV (Premium-Filme)
PPV	pay-per-view	péage à la consommation	Pay-per-View
PR	private	privé	privat
PS	public service	service public	öffentlich-rechtlich
rtv	regional or local television company	entreprise de télévision régionale ou locale	regionale oder lokale Fernsehunternehmen
Sat-TV	Television by satellite	télévision par satellite	Satellitenfernsehen
SMATV	Satellite Master Antenna Television	Satellite Master Antenna Television	Satellite Master Antenna Television
sptv	public television company	entreprise publique de télévision	Öffentlich-rechtliche Fernsehanstalt
thtv	publisher of private thematic channel(s)	éditeur de chaîne(s) thématique(s)	Betreiber von privaten Spartenkanälen
TNT	(=DTT)	télévision numérique terrestre	(=DVB-T)
VoD	Video on Demand	vidéo à la demande (=VàD)	Video-on-Demand

Data in italics are estimated or provisional.

Les données en italiques sont estimées ou provisoires.

Kursiv gedruckte Daten sind geschätzt oder vorläufig.

European Audiovisual Observatory

VAT rates on audiovisual and telecommunication products and services

as at 13.1.2014

The purpose of this table is to provide information on the VAT rate as an element of explanation of market trends and European strategy of international stakeholders.

The European Audiovisual Observatory has no expertise in fiscal issues. The following table is compiled by the Observatory from data collected by the European Commission [1], the IVF and the EFARN network.

This information has not been verified by national fiscal authorities. The qualification of some services, and therefore the VAT applicable, may be matter of discussion, in particular when related to new services. The Observatory cannot be held responsible for its accuracy or completeness.

Country	Standard rate	Cinema	Video	Pay-TV subscription	Online distribution of television and VoD (rental/purchase/SVoD) services	Radio-TV licence fee	Broadcasting transmission (terrestrial, cable, IPTV)	Telephone/Internet connexion services
AT	20	10	20	20	20	10	10/20	20
BE	21	6	21	21	21	–	21	21
BG	20	20	20	20		20	20	20
CY	19	5	19	19		19	19	19
CZ	21	15	21	21		*Exempt*	21	21
DE	19	7	19	19	19	*Exempt*	19	19
DK	25	25	25	25		25	25	25
EE	20	20	20	20	20	20	20	20
ES	21	21	21	21		21	21	21
FI	24	10	24	24	24	10	24	24
FR	20	5.5	20	10	20	2.1	10	20
GB	20	20	20	20	20	*Exempt*	20	20
GR	23	13	23	13		*Exempt*	13	23
HU	27	27	27	27		*Exempt*	27	27
HR	25	0	25	25				
IE	23	9	23	23		*Exempt*	23	23
IT	22	10	22	22	22	4	22	22
LT	21	21	21	21		21	21	21
LU	15	3	15	3	15	*Exempt*	15	15
LV	21	21	21	21		–	21	21
MT	18	5	18	18		*Exempt*	18	18
NL	21	6	21	21	21	*Exempt*	21	21
PL	23	8	23	8	23	23	23	23
PT	23	13	23	23	23	23	23	23
RO	24	9	24	24	24	24	24	24
SE	25	6	25	25	25	*Exempt*	25	25
SI	22	9.5	22	22	22	*Exempt*	22	22
SK	20	20	20	20	20	*Exempt*	20	20
VAT rates in selected Non-EU Countries (%)								
CH	8	2.5	8	8	8			
IS	25.5	25.5 [2]	25.5	7	25.5	~	25.5	25.5
MK	18	18	18					
NO	25	8	25	25				
RU	18	0	18	18	18	18	18	18
TR	18	8	18	18				
TR	18	8	18	18				

[1] See the document *VAT Rates Applied in the Member States of the European Union. Situation as at 13 January 2014*, European Commission.
[2] Exemption for national films.

➥ European Audiovisual Observatory

Average exchange rates

2008-2013 In EUR. Annual average mid-point rate.

Country	Currency	Name of currency	2009	2010	2011	2012	2013
EUR	EUR	Euro	1.0000	1.0000	1.0000	1.0000	1.0000
AL	ALL	Albanian Lek	0.0076	0.0073	0.0071	0.0073	0.0071
BA	BAM	Bosnian Mark	0.5112	0.5112	0.5113	0.5114	0.5101
BG	BGN	Bulgarian Lev	0.5112	0.5112	0.5113	0.5117	0.5105
CH	CHF	Swiss Franc	0.6623	0.7246	0.8125	0.8298	0.7871
CZ	CZK	Czech Koruna	0.0379	0.0396	0.0407	0.0398	0.0385
DK	DKK	Danish Krone	0.1343	0.1343	0.1342	0.1344	0.1341
EE	EEK	Estonian Kroon	0.0639	0.0639			
GB	GBP	UK Pound	1.1227	1.1656	1.1525	1.2333	1.1777
HR	HRK	Croatian Kuna	0.1362	0.1372	0.1345	0.1333	0.1318
HU	HUF	Hungarian Forint	0.0036	0.0036	0.0036	0.0035	0.0034
IS	ISK	Icelandic Krona	0.0058	0.0061	0.0062	0.0062	0.0059
LT	LTL	Lithuanian Litas	0.2896	0.2896	0.2896	0.2914	0.2887
LV	LVL	Latvian Lats	1.4170	1.4113	1.4162	1.4407	1.4274
MK	MKD	Macedonian Dinar	0.0162	0.0163	0.0163	0.0164	0.0161
NO	NOK	Norwegian Kroner	0.1145	0.1248	0.1282	0.1338	0.1241
PL	PLN	Polish Zloty	0.2316	0.2505	0.2435	0.2395	0.2382
RO	RON	Romanian New Lei	0.2360	0.2375	0.2360	0.2246	0.2261
RU	RUB	Russian Rouble	0.0227	0.0249	0.0245	0.0251	0.0229
SE	SEK	Swedish Krona	0.0942	0.1048	0.1108	0.1150	0.1156
SK	SKK	Slovak Koruna					
TR	TRY	Turkish Lira	0.4628	0.5008	0.4299	0.4325	0.3838
US	USD	US Dollar	0.7191	0.7548	0.7189	0.7783	0.7783
JP	JPY	Japanese Yen	0.0077	0.0086	0.0090	0.0098	0.0098

Missing values indicate that a country has joined the EUR.

Oanda

Population by country

2008-2013 In million persons.

Country	2008	2009	2010	2011	2012	2013	*2013/12*	Sources
AL	3.18	3.19	3.20	3.22	3.24	3.26	***0.5%***	IMF
AT	8.36	8.38	8.40	8.44	8.41	8.45	***0.5%***	Eurostat
BA	3.99	3.90	3.90	3.89	3.88	3.88	***-0.2%***	IMF
BE	10.75	10.84	10.95	11.04	11.09	11.16	***0.6%***	Eurostat
BG	7.61	7.56	7.37	7.33	7.33	7.28	***-0.6%***	Eurostat
CH	7.70	7.79	7.87	7.95	7.95	8.04	***1.1%***	Eurostat
CY	0.80	0.82	0.84	0.86	0.86	0.87	***0.4%***	Eurostat
CZ	10.47	10.51	10.49	10.50	10.51	10.52	***0.1%***	Eurostat
DE	82.00	81.80	81.75	81.84	80.33	80.52	***0.2%***	Eurostat
DK	5.51	5.53	5.55	5.58	5.58	5.60	***0.4%***	Eurostat
EE	1.34	1.34	1.34	1.34	1.33	1.32	***-0.4%***	Eurostat
ES	45.83	45.99	46.15	46.20	46.82	46.73	***-0.2%***	Eurostat
FI	5.33	5.35	5.38	5.40	5.40	5.43	***0.5%***	Eurostat
FR	64.35	64.69	65.05	65.40	65.29	65.58	***0.4%***	Eurostat
GB	61.60	62.03	62.50	62.99	63.50	63.90	***0.6%***	Eurostat
GR	11.26	11.31	11.31	11.29	11.12	11.06	***-0.5%***	Eurostat
HR	4.44	4.43	4.41	4.41	4.28	4.26	***-0.3%***	Eurostat
HU	10.03	10.01	9.99	9.96	9.93	9.91	***-0.2%***	Eurostat
IE	4.45	4.47	4.48	4.50	4.58	4.59	***0.2%***	Eurostat
IS	0.32	0.32	0.32	0.32	0.32	0.32	***0.7%***	Eurostat
IT	60.05	60.34	60.63	59.36	59.39	59.69	***0.5%***	Eurostat
LI	0.04	0.04	0.04	0.04	0.04	0.04	***1.0%***	Eurostat
LT	3.21	3.18	3.14	3.05	3.00	2.97	***-1.1%***	Eurostat
LU	0.49	0.50	0.51	0.52	0.52	0.54	***2.3%***	Eurostat
LV	2.26	2.25	2.07	2.04	2.04	2.02	***-1.0%***	Eurostat
ME	0.63	0.62	0.62	0.62	0.62	0.62	***0.2%***	Eurostat
MK	2.06	2.05	2.06	2.06	2.06	2.06	***0.1%***	IMF
MT	0.41	0.41	0.42	0.42	0.42	0.42	***0.9%***	Eurostat
NL	16.49	16.57	16.66	16.73	16.73	16.78	***0.3%***	Eurostat
NO	4.80	4.86	4.92	4.99	4.99	5.05	***1.3%***	Eurostat
PL	38.14	38.17	38.20	38.21	38.54	38.53	***0.0%***	Eurostat
PT	10.63	10.64	10.57	10.54	10.54	10.49	***-0.5%***	Eurostat
RO	20.64	20.44	20.29	20.20	20.10	20.02	***-0.4%***	Eurostat
RU	142.00	143.00	142.90	142.41	141.92	141.44	***-0.3%***	IMF
SE	9.26	9.34	9.42	9.48	9.48	9.56	***0.8%***	Eurostat
SI	2.03	2.05	2.05	2.06	2.06	2.06	***0.2%***	Eurostat
SK	5.41	5.42	5.39	5.40	5.40	5.41	***0.1%***	Eurostat
TR	71.52	72.56	73.72	74.72	74.72	75.63	***1.2%***	Eurostat
EUR 28 *est.*	**503.12**	**504.38**	**505.31**	**505.11**	**504.58**	**505.67**	***0.2%***	OBS
EUR 38 *est.*	**739.35**	**742.70**	**744.85**	**745.33**	**744.34**	**746.00**	***0.2%***	OBS
US	304.42	307.37	310.00	312.89	314.18	316.51	***0.7%***	IMF
JP	127.69	127.55	127.59	127.92	127.61	127.34	***-0.2%***	IMF

➥ European Audiovisual Observatory

Members of the European Audiovisual Observatory / Membres de l'Observatoire européen de l'audiovisuel / *Mitglieder der Europäischen Audiovisuellen Informationsstelle*

AL	Albania	Albanie	Albanien
AM	Armenia	Arménie	Armenien
AT	Austria	Autriche	Österreich
BA	Bosnia and Herzegovina	Bosnie-Herzégovine	Bosnien und Herzegowina
BE	Belgium	Belgique	Belgien
BG	Bulgaria	Bulgarie	Bulgarien
CH	Switzerland	Suisse	Schweiz
CY	Cyprus	Chypre	Zypern
CZ	Czech Republic	République tchèque	Tschechische Republik
DE	Germany	Allemagne	Deutschland
DK	Denmark	Danemark	Dänemark
EE	Estonia	Estonie	Estland
ES	Spain	Espagne	Spanien
FI	Finland	Finlande	Finnland
FR	France	France	Frankreich
GB	United Kingdom	Royaume-Uni	Vereinigtes Königreich
GR	Greece	Grèce	Griechenland
HR	Croatia	Croatie	Kroatien
HU	Hungary	Hongrie	Ungarn
IE	Ireland	Irlande	Irland
IS	Iceland	Islande	Island
IT	Italy	Italie	Italien
LI	Liechtenstein	Principauté de Liechtenstein	Fürstentum Liechtenstein
LT	Lithuania	Lituanie	Litauen
LU	Luxembourg	Luxembourg	Luxemburg
LV	Latvia	Lettonie	Lettland
MA	Morocco	Maroc	Marokko
ME	Montenegro	Monténégro	Montenegro
MK	"The former Yugoslav Republic of Macedonia"	"Ex-République yougoslave de Macédoine"	"Ehemalige jugoslawische Republik Mazedonien"
MT	Malta	Malte	Malta
NL	Netherlands	Pays-Bas	Niederlande
NO	Norway	Norvège	Norwegen
PL	Poland	Pologne	Polen
PT	Portugal	Portugal	Portugal
RO	Romania	Roumanie	Rumänien
RU	Russian Federation	Fédération de Russie	Russische Föderation
SE	Sweden	Suède	Schweden
SI	Slovenia	Slovénie	Slowenien
SK	Slovak Republic	République slovaque	Slowakische Republik
TR	Turkey	Turquie	Türkei
EUR 28	European Union	Union européenne	Europäische Union

European States non-members of the European Audiovisual Observatory / Etats européens non-membres de l'Observatoire européen de l'audiovisuel / *Europäische Staaten, die nicht Mitglied der Informationsstelle sind*

BY	Belarus	Bielorussie	Weißrussland
GE	Georgia	Géorgie	Georgien
MD	Moldova	Moldavie	Moldawien
RS	Republic of Serbia	République de Serbie	Republik Serbien
UA	Ukraine	Ukraine	Ukraine

Non-European States / Etats non-européens / *Außereuropäische Staaten*

BM	Bermuda	Bermudes	Bermudas
DZ	Algeria	Algérie	Algerien
EG	Egypt	Egypte	Ägypten
IL	Israel	Israël	Israel
JO	Jordan	Jordanie	Jordanien
JP	Japan	Japon	Japan
LB	Lebanon	Liban	Libanon
SA	Saudi Arabia	Arabie Saoudite	Saudi-Arabien
SY	Syrian Arabic Republic	République arabe de Syrie	Arabische Republik Syrien
TN	Tunisia	Tunisie	Tunesien
US	United States of America	Etats-Unis d'Amérique	Vereinigte Staaten von Amerika

Television, cinema, video and on-demand audiovisual services in Europe

YEARBOOK 2014

The European Audiovisual Observatory Yearbook offers a comprehensive overview of the audiovisual sector in the Observatory's 40 member states.

Data from more than 1,000 different sources are collected and analysed, and information is presented in over 500 graphs and tables. The result is a unique overview of Europe's audiovisual markets in film, television and video.

The impartiality of the data presented is guaranteed by the Observatory's status as a pan-European public body.

The Yearbook constitutes an outstanding source for all those involved in the audiovisual sector, whether policy makers, professionals or academics.

Télévision, cinéma, vidéo et services audiovisuels à la demande en Europe

ANNUAIRE 2014

L'Annuaire de l'Observatoire européen de l'audiovisuel présente une analyse complète du secteur audiovisuel (cinéma, télévision et vidéo) dans ses 40 Etats membres.

La préparation et l'exploitation de données issues de plus de mille sources différentes et la présentation des résultats en plus de cinq cents graphiques et tableaux donnent une vue d'ensemble unique du marché en Europe.

Le statut d'organisme de service public paneuropéen garantit l'impartialité de ces données.

Le présent Annuaire constitue de ce fait une remarquable source d'information pour les professionnels, les décideurs et les scienti-fiques.

Fernsehen, Film, Video und audiovisuelle Abrufdienste in Europa

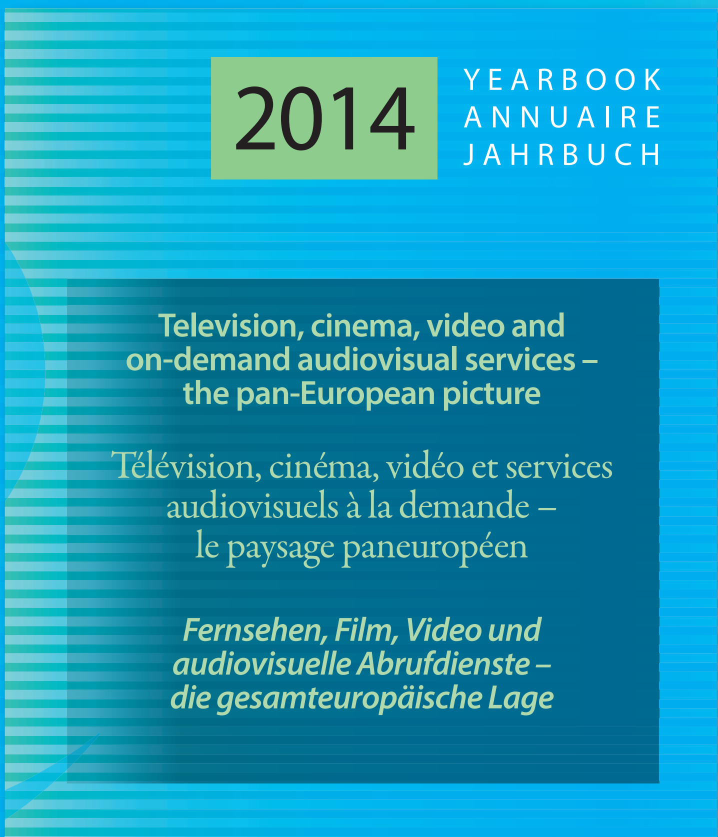
JAHRBUCH 2014

Das Jahrbuch der Europäischen Audiovisuellen Informationsstelle gibt für ihre 40 Mitgliedstaaten einen umfassenden Überblick über die Entwicklung des audiovisuellen Sektors in den Bereichen Film, Fernsehen und Video.

Die Aufbereitung und Auswertung von mehr als 1000 Einzelquellen und die Darstellung der Ergebnisse in über 500 Graphiken und Tabellen verschaffen in Europa einen einmaligen Marktüberblick.

Die Neutralität der Darstellung wird durch den öffentlich-rechtlichen Status der Europäischen Audiovisuellen Informationsstelle garantiert.

Damit bietet das vorliegende Jahrbuch eine hervorragende Informationsquelle für alle Zielgruppen in der Politik, in der Industrie und in der Wissenschaft.



272 pages - Seiten ISBN 978-92-871-8018-6 PDF VERSION **265 €**

The content of the Yearbook is also available online:
Le contenu de cet annuaire est également disponible en ligne :
Die Inhalte des Jahrbuchs stehen auch online zur Verfügung:

http://www.obs.coe.int/eservices/premiumservice