

Measuring the Concentration of Audience for Television and Video On-line

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Concentration of television audience market shares

The most classical indicator for measuring concentration of the TV audience market is the TV national audience daily market share, calculated over a given period (most frequently one year). In most of the European countries (with the exception of Luxembourg and Malta) the data are calculated by national audience measurement institutes, using the methodology of sampling and measuring by peplemeter. Yearly data are communicated, channel by channel, to the European Audiovisual Observatory by Eurodata-TV, the international service of the French institute Médiamétrie. Based on our knowledge of ownership (through the database MAVISE, the database AMADEUS and information provided by national sources), we have calculated the 2011 national daily audience market shares of the various groups. There is no legal European definition of a TV group, but there is no great difficulty in identifying groups through the analysis of ownership structure, which is in general well documented.¹ We have then calculated the combined audiences in 2011 of the four leading groups by country (table 1) and also calculated the daily audience market shares in 2011 of the leading groups in Europe in each of the markets where their channels are available.

Using daily national audience market share for measuring concentration of the TV market has various theoretical and practical limits that should be considered when comparing the figures.

1. It may be discussed that the national daily audience market share is a pertinent indicator for measuring the “relevant market” on which competition authorities will analyse a TV market.² Various questions should be considered

- Is the national market the correct geographical approach? The fact that a group is operating channels in various countries may give to it a specific strength to negotiate rights with programme providers. In particular the audience markets share of the thematic services provided by US conglomerates are relatively small when considered from the perspective of national markets. But once cumulated at the European level they are all but negligible.

1) It is open to discussion whether the leading shareholding by a single person in various companies or groups constitutes per se a new group. In 2008, the Hungarian Broadcasting Authority considered that John Malone was at the same time the leading shareholder in both Liberty Global and in Discovery Inc. that this was sufficient to consider that there is a “John Malone Group”. We have not taken this approach and considered only the ownership of companies by other constituted companies or holding.

2) For a discussion on the concept of “relevant market” to be defined to assess concentration in the media sector, see the various reports published between 2002 and 2005 by the DG Competition of the European Commission:

<http://ec.europa.eu/competition/sectors/media/documents/index.html>

Of particular interest (and challenging for any perspective of precise measurement of concentration on a relevant market of the media sector), see in particular: *Market Definition in the Media Sector, Economic Issues*, by Europe Economics. November 2002, http://ec.europa.eu/competition/sectors/media/documents/european_economics.pdf

- Is the daily audience market share of all channels available in a country a real pertinent market? Markets may be subdivided into free and paying channels, in channels by genre, in channels for a specific target,...
- Is the all day audience the correct period to take into consideration? Market shares may be very different if considered during an all day period or during the prime-time.

2. The comprehensiveness of data available differs from country to country. In some countries the data at our disposal may be considered as comprehensive (i.e. we can analyse 100% of the audience), but in most of the countries the category "others" may be very important (between 25% and 33% of the audience, as indicated by the data in column 2 of table 1). Those gaps may be due to a variety of reasons including technical or contractual. The gaps will generally concern the small channels and not the leading ones. But the accumulation of tiny audience shares of various thematic channels provided by a group may, once cumulated, be substantial. In case of non comprehensive coverage, the market shares and rate of concentration should be considered as a minimum.

3. The level of concentration of the daily national audience market share is not necessarily the best indicator for measuring the quality of pluralism and cultural diversity. As a matter of fact, it may be observed that the level of concentration measured by the cumulated daily audience market shares of the four leading groups is higher in the countries where public broadcasters still have a leading position on the audience market share. The fact that public broadcasters are better providers of pluralism and diversity may of course be discussed but this should be done by analysis of the programmes and editorial policies, not by the simple calculation of audience market shares.

Table 1 : TV daily audience market shares of the four leading TV groups (2011)

Audience data for channels were provided by Eurodata TV Worldwide and its network of audience measurement institutes.

We have calculated the audience shares of groups on the basis of our knowledge of ownership (Databases MAVISE and AMADEUS).

Mergers that took place during 2011 were considered only when finalised by 31 December 2011. Mergers that took place in 2012 have not been taken into consideration.

The sign > indicates that the figure is at a minimum, when market shares for small thematic channels or foreign channels are not available.

Market shares of public broadcasting groups are indicated in bold.

	Non identified market shares
Sweden	0,0%
Finland	9,0%
Germany (1)	3,8%
Czech Republic	9,3%
Italy	7,1%
Norway	1,6%
Denmark	5,4%
Belgium (Flemish Community)	16,7%
Portugal	16,6%
Poland	2,9%
Netherlands (2)	12,0%
United Kingdom	0,0%
Croatia	17,8%
Swiss (Italian speaking)	18,8%
Belgium (French Community)	12,4%
Bulgaria	10,8%
France (all TV households) (3)	12,1%
p.m. France (cable, satellite, IPTV households) (4)	1,4%
Austria	9,5%
Slovenia	1,80%
Spain (5)	0,0%
Slovakia	28,1%
Cyprus (6)	20,7%
Estonia (3)	18,6%
Swiss (German speaking)	18,7%
Swiss (French speaking)	25,7%
Greece	11,6%
Hungary	12,2%
Lithuania (2)	24,9%
Russia	11,4%
Latvia (7)	29,1%
Ireland	29,6%
The former yugoslav Republic of Macedonia	30,9%
Romania	2,7%
Luxembourg (2009/2010)	33,7%

(1) ARD is considered as a group, albeit it is composed of independent regional organisations.

(2) In Cyprus, in Estonia, in Lithuania and in the Netherlands the viewing of home video and of programmes stored on PVR are included in the calculation of TV audience market shares. For EE and NL we have recalculated the figures, excluding DVD and video.

(3) The level of concentration will increase in 2012, with the take-over of the Direct 8 Channel (Bolloré Group) by Canal+.

(4) This population represents around 74.4% of the households. The data available on market shares for thematic channels are more detailed and comprehensive than the data related to the overall population in the preceding line.

(5) The level of concentration will increase in 2012, with the merger of Antenna 3 (third group) and La Sexta, part of Imagina Media (fourth group). The new group will have around 33% of market share.

Market shares of the 4 leading groups				Total	Total
1	2	3	4	3 leading groups	4 leading groups
34,8%	28,9%	19,5%	8,7%	83,2%	91,9%
44,3%	>27.7%	>14.5%	3,0%	>86.5%	>89.5%
> 27.2%	>26.5%	>20.7%	>14.5%	74,4%	88,9%
33,7%	27,0%	22,0%	5,5%	82,7%	88,2%
40,2%	>36.8%	>6;1%	4,1%	83,1%	87,2%
>41.1%	>25.7%	11,2%	8,5%	>78%	>86.5%
39,7%	28,4%	>9.6%	>7%	>77.7%	84,7%
41,8%	>24.6%	10,2%	4,0%	>80.6%	>84%
27,20%	26,80%	26,70%	3,30%	80,7%	84%
36,5%	24,3%	20,1%	2,3%	80,9%	83,2%
>33.7%	>27.6%	16,6%	>4.6%	>77.9%	>82.5%
36,9%	23,2%	11,7%	10,2%	71,8%	82,0%
30,1%	27,7%	>21.5%	2,0%	>79.3%	>81.3%
35,8%	22,6%	20,1%	1,5%	78,5%	80,0%
>27.6%	20,5%	>17.2%	13,3%	>65.3%	>78.6%
44,4%	21,1%	8,4%	3,9%	73,9%	77,8%
29,9%	>29.1%	>14.2%	>3.9%	>73.2%	>76.1%
29,9%	25,3%	15,7%	11,7%	70,9%	82,6%
37,5%	>17.1%	>10.7%	>8.9%	>65.3%	>74.2%
37,9%	26,90%	6,60%	2,6%	71,4%	74,0%
>25%	22,7%	>17.1%	>7.9%	>64.8%	>72.7%
34%	23,80%	12,20%	1,90%	70,0%	71,9%
20,8%	17,4%	17,0%	16,6%	55,2%	71,8%
19,4%	18,5%	17,8%	11,4%	55,7%	67,1%
31,6%	>15.5%	11,1%	8,4%	>58.2%	>66.6%
28,7%	15,9%	12,8%	>8.2%	57,4%	>65.6%
>20%	17,0%	13,3%	13,1%	>50.3%	>63.4%
29,8%	19,7%	11,9%	>4.9%	>61.4%	>66.3%
>24.4%	17,7%	11,3%	8,4%	>53.4%	>61.9%
>19.9%	>16.8%	>14.3%	>7.6%	51,0%	58,6%
>16.6%	>16.1%	12,9%	11,3%	>45.6%	>56.9%
31,7%	13,9%	>6.9%	>4.2%	>52.5%	>56.7%
22,2%	14,8%	9,7%	7,9%	46,7%	54,6%
21,5%	18,5%	7,6%	6,3%	47,6%	53,9%
>27.3%	>11%	>8.7%	>6.4%	>47%	>53.4%

(6) In Cyprus, video represented in 2010 3.2% of audience market share. No data available for 2011, but it is probably included in the 20.7% non identified.

(7) In September 2012, MTG (second group in 2011) announced the take-over of NMM (the first group). The take-over is pending the agreement of the Competition Commission.

Source: European Audiovisual Observatory

Table 2: National daily audience market shares in 2011 of the leading TV groups active in Europe

> indicates a market share as a minimum
 n.a. indicates that data is not available
 – indicates: does not apply

2.1. Pan-European groups

	ProSiebenSat1 Media AG (DE)		RTL Group (DE)		TF1 (FR)	
Main brands	Pro7, Sat1, Kabel1, part of the former SBS group		RTL, M6, IKO		TF1, Eurosport	
	Number of channels	Daily audience	Number of channels	Daily audience	Number of channels	Daily audience
AT	12	>17.1%	11	>10.7%	11	>0.6%
BE (French Community)	3	n.a.	10	>27.6%	15	>17.2%
BE (Flemish Community)	3	n.a.	15	0,4%	22	>0.2%
BG	3	>0,3%	1	n.a.	3	>0.4%
CH (German speaking)	12	11,1%	n.a.	>15.5%	n.a.	>0.7%
CH (French speaking)	n.a.	n.a.	n.a.	>8.2%	n.a.	15,9%
CH (Italian speaking)	n.a.	n.a.	n.a.	n.a.	n.a.	>0.5%
CZ	4	n.a.	7	>0.2%	4	n.a.
DE	12	>20.7%	21	>26.5%	4	>0.7%
DK	10	>7%	5	n.a.	4	1,1%
EE	3	n.a.	5	n.a.	5	n.a.
ES	–	–	(1)	(1)	5	n.a.
FI	4	3,0%	5	n.a.	4	n.a.
FR	4	n.a.	17	>14.2%	19	>29.1%
GB	–	–	–	–	4	n.a.
GR	–	–	3	13,10%	32	n.a.
HR	3	n.a.	3	>21.5%	7	n.a.
HU	7	19,7%	15	>29.8%	5	n.a.
IE	–	–	–	–	3	n.a.
IT	–	–	–	–	18	n.a.
LT	3	n.a.	5	n.a.	5	n.a.
LU	3	>13.1%	20	>27.3%	7	>8.7%
LV	3	n.a.	–	–	4	n.a.
NL	3	n.a.	9	26,2%	10	>0.9%
NO	5	11,6%	n.a.	n.a.	n.a.	>0.5%
PL	3	n.a.	4	n.a.	42	0,7%
PT	1	n.a.	4	n.a.	7	0,5%
RO	6	4,4%	3	n.a.	4	0,8%
RU	–	-300,0%	n.a.	n.a.	5	n.a.
SE	4	8,7%	1	n.a.	4	0,7%
SI	3	0,3%	6	1,9%	2	0,4%
SK	3	n.a.	6	n.a.	6	n.a.

(1) After the takeover of La Sexta by Antena 3, RTL Group owns a 19.2 % share in Antena 3 Group. Antena 3 had a market share of >17.1% in 2011 and La Sexta of 7.9%.

(2) Each linguistic version or HD version of Eurosport, Eurosport2 and Eurosportnews are counted as a separate channel.

(3) In Russia, the RTL Group is a minority shareholder (30%) of Ren TV. Ren TV had a 4.4% daily market share in 2011 and is controlled to a level of 68% by the National Media group.

2.1. Former pan-European groups with reduced European coverage

	Mediaset (IT)		Vivendi (FR)	
	Number of channels	Daily audience	Number of channels	Daily audience
AT	–	–	1	n.a.
BE	–	–	10	n.a.
CH (Italian speaking)	n.a.	22,60%	–	–
CH (French speaking)	n.a.	n.a.	5	>2.3%
ES	13	>25%	–	n.a.
FR	–	–	55	>3.9% (1)
IT	–	>35.9%	–	–
PL	–	–	14	>1.6%
PT	–	–	1	>0.1%
SI	3	0,3%	–	–

(1) 11.7% in the multichannel universe (cable, satellite, IPTV households).

2.2. Regional groups - Nordic and Eastern European Groups

	Baltic Media Alliance (GB)	CME (US/BM)	Gasprom Media (RU)	MTG (SE)	Sanoma (FI)	Telenor (NO)
BE (Flemish Community)	–	–	–	–	10,2%	–
BG	–	44,2%	–	21,1%	–	–
CZ	–	33,7%	–	22,0%	–	–
DK	–	–	–	>9.6%	–	>0.5%
EE	13,0%	–	4,60%	>17.8%	–	–
FI	–	–	–	n.a.	>14.5%	n.a.
HU	–	–	–	>4.3%	2,5%	–
LT	5,4%	–	–	>24.4%	–	–
LV	11,3%	–	5,10%	>16.1%	–	–
NL	–	–	–	–	15,8%	–
NO	–	–	–	8,5%	–	0,3%
RO	–	21,5%	–	0,5%	0,1%	–
RU	–	–	21,90%	9,8%	–	–
SE	–	–	–	19,5%	–	1,5%
SI	–	37,9%	–	6,6%	–	–
SK	–	34,0%	–	–	–	–

(1) In Russia MTG has a 38.6% share in the CTC Media group (channels CTC Network and Domashny).

2.3. US and Japanese International conglomerates

	Discovery	Liberty Global	NBC Universal	News Corp	Sony (JP)	Viacom	Time Warner	Walt Disney
AT	n.a.	n.a.	n.a.	n.a.	n.a.	>1.1%	n.a.	n.a.
BE (French Community)	n.a.	–	n.a.	–	n.a.	>1.4%	n.a.	n.a.
BE (Flemish Community)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	>2%
BG	>1%	–	0,3%	>1.9%	0,3%	n.a.	>0.8%	>2%
CH (German speaking)	n.a.	n.a.	n.a.	n.a.	n.a.	4,7%	n.a.	n.a.
CH (French Speaking)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	>0.8%	n.a.
CH (Italian speaking)	0,1%	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	0,7%
CZ	n.a.	0,5%	0,1%	0,1%	0,1%	n.a.	n.a.	0,7%
DE	>0.7%	n.a.	n.a.	>0.9%	n.a.	>0.9%	n.a.	n.a.
DK	>1.5%	n.a.	n.a.	0,7%	n.a.	>1.6%	>0.7%	>2.6%
EE	n.a.	–	n.a.	–	–	n.a.	n.a.	n.a.
ES	0,1%	0,8%	0,1%	0,6%	0,4%	0,6%	0,5%	2,0%
FI	0,5%	–	n.a.	–	–	n.a.	n.a.	n.a.
FR (multichannel universe)	0,2%	–	1,2%	0,2%	–	1,0%	0,60%	1,8%
GB	1,6%	n.a.	n.a.	10,2%	n.a.	2,0%	1%	1,4%
GR	n.a.	n.a.	n.a.	n.a.	n.a.	1,0%	n.a.	n.a.
HR	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
HU	>1.1%	5,0%	1,3%	0,8%	1,3%	>2.3%	>1.1%	>2%
IE	0,5%	–	0,4%	>5.1%	–	2,5%	n.a.	n.a.
IT	1,2%	n.a.	n.a.	6,1%	0,3%	0,4%	0,4%	0,9%
LT	n.a.	n.a.	n.a.	n.a.	n.a.	>0.2%	n.a.	n.a.
LU	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
LV	n.a.	n.a.	n.a.	1,2%	n.a.	n.a.	n.a.	n.a.
NL	>2.2%	n.a.	n.a.	n.a.	n.a.	>4.6%	n.a.	>1.9%
NO	2,8%	n.a.	n.a.	0,9%	n.a.	0,5%	1,1%	3,1%
PL	1,9%	0,7%	0,6%	0,8%	1%	2,0%	2,1%	2,2%
PT	0,5%	3,2%	0,1%	2,5%	1,5%	0,7%		1,2%
RO	1,5%	2,5%	1,3%	0,6%	0,7%	0,5%	3,2%	2,5%
RU	n.a.	n.a.	n.a.	n.a.	n.a.	>0.7%		
SE	2,2%	0,1%	0,1%	0,4%	n.a.	2,1%	0,9%	1,5%
SI	2,6%	1,3%	0,7%	1,8%	0,1%	0,8%	1,5%	0,7%
SK	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.

2.4. Main public broadcasters with significant overspill of national channels in neighbouring countries or pan-European thematic channels

	ARD (DE)	ZDF (DE)	France-Télévisions (FR)	BBC (GB)	RAI (IT)
AT	>9.9%	4,10%	–	n.a.	n.a.
BE (French Community)	n.a.	n.a.	>13.3%	n.a.	n.a.
BE (Flemish Community)	n.a.	n.a.	>0.5%	n.a.	n.a.
CH (German speaking)	8,4%	5,7%	n.a.	n.a.	n.a.
CH (French speaking)	0,4%	n.a.	12,80%	n.a.	0,7%
CH (Italian speaking)	0,5%	0,4%	>0.5%	n.a.	20,1%
DE	>27.2%	>14.5%	–	n.a.	n.a.
DK	n.a.	n.a.	–	0,7%	n.a.
FR	n.a.	n.a.	>29.9%	n.a.	n.a.
GB	–	–	–	36,9%	–
IE	–	–	–	>6.9%	–
IT	–	–	–	n.a.	40,2%
LU (2009-2010)	>6.4%	6%	>3.4%	n.a.	n.a.
NO	n.a.	n.a.	–	1,1%	–
SI	n.a.	n.a.	–	n.a.	0,2%

Source: European Audiovisual Observatory

Concentration of on-line video audience market shares

As for the audience of on-line video, it is possible to propose relatively harmonised data by using the data collected by a single company (comScore) for the six leading European markets (France, Germany, Italy, Russia, Spain, United Kingdom). The data provided in the comScore Video Metrix provided by comScore are already grouped by ownership (“properties” in comScore terminology) and, in principle cover all the on-line video audience. All on-line video services are measured when the consumption takes place during the connection. However videos viewed after a download (as it is the case for download-to-own VoD services) are not measured, nor are encrypted videos.¹

From data provided by comScore (40 Top properties for 1st Semester 2012²) on the number of unique viewers by properties, the average monthly number of videos viewed by viewers and the average viewing time of a video by viewers, we have calculated the average monthly market share of the 40 leading properties during the 1st Semester 2012 and the combined market shares of the three and four leading ownership groups.

These data show the importance of the dominance of Google services (mainly YouTube) in the six markets under consideration. The combined audience market share of the four properties is much lower than the combined market shares of the four leading TV groups in the countries. However, it should be noted that porn services (for which the audience data was not commissioned from comScore) are not included in the calculation of the audience market shares. An analysis of the comScore data for the UK for the full year 2010 including porn services shows that the combined audience market share of the four leading properties (three of which are providers of porn services) represented 52.5% of the market.

1) For details, see comScore Video Metrix Methodology, comScore, July 2012.

2) Porn video services are excluded from the list provided. The fact of taking them into consideration would certainly change dramatically the analysis.

Table 3: Audience concentration market share of video online properties in six European countries (1st semester 2012)

	Market shares of the 4 leading groups				Total	Total
	1	2	3	4	3 leading groups	4 leading groups
IT	30,1%	2,3%	1,2%	1,2%	33,6%	34,8%
ES	25,4%	5,5%	2,2%	1,7%	33,1%	34,8%
FR	25,0%	5,4%	2,6%	1,3%	33,0%	34,3%
GB	28,9%	1,2%	1,0%	0,9%	31,1%	32,0%
DE	24,5%	0,7%	0,5%	0,5%	25,7%	26,2%
RU	17,8%	3,5%	3,1%	1,1%	24,4%	25,5%

Source: European Audiovisual Observatory on comScore Video Metrix data