

Harmonisation of statistical data

The first edition of *The Statistical Yearbook. Cinema, Television, Video and New Media in Europe 1994-95* is now out. The yearbook marks the first step in the realisation of the Observatory's mission for the harmonisation and transparency of statistical information. The production of the yearbook in itself provided a acid test in the gathering of comparative statistical data. Harmonisation of statistical data is a considerable, long-term task. It can, however, be said that two of the preliminary stages in this work have been successfully completed: a survey of existing structures and an initial editing of the data.

The survey of existing structures involved identifying, as fully as possible, existing data and sources. The Observatory was able to use information drawn from the specialist pan-European information networks comprising its various partners (BIPE Conseil, IDATE, the European Institute for the Media, *Screen Digest*) and thematic correspondents (EAT, ECCA, Eurodata-TV, GEAR; Statistical Group of the EBU). All the data we received were in fact either systematically checked, wherever possible, or subjected to critical analysis.

The editing of the data cannot really be considered as a genuine harmonisation. What harmonisation actually means is the use of common definitions and similar data gathering methods. Therefore we took up a pragmatic approach, as it did not appear to be within the realms of possibility to adopt specific definitions and gathering methods, but rather to incorporate a sort of "principle of statistical subsidiarity" within the scope of the survey of existing structures, based on the actual national statistical apparatus in current use. Editing the data followed a more modest method but with an immediate effect: it aims to present existing data so that the most obvious differences are corrected. For example, the definition and data gathering methods for household expenditure on cinema tickets have not been harmonised. However, a basic requirement when editing the synthesised Euro-

pean data is that VAT should be systematically taken into account, whenever it actually exists.

Sources and methods

The yearbook is divided up into seven chapters, each dealing with a single major theme: general data, equipment, companies and employment, cinema, video and new media, television and advertising. Each theme covered had its own inherent difficulties, the details of which are included in the "comments on methodology".

Assessing the level of audiovisual equipment in households (televisions, VCRs, cable, satellite dishes, new digital players, etc.) varies according to the kind of equipment considered. It is relatively easy to find the number of connections and subscribers to cable networks from the data provided by the cable distributor associations, members of the European Cable Communication Association. Only Spain and the Russian Federation are problematic in this respect. For electronic goods, on the other hand, it is much more difficult to gain an accurate picture. The number of televisions can be computed according to the number of licence fees paid, in those countries where the licence fee system exists. However, the absolute veracity of the results cannot be guaranteed, given the varying level of licence fee evasion from one country to another. For the other kinds of equipment (VTRs, digital-system players, video games, etc.), the yearbook relied on data provided by two of its partners, BIPE Conseil and *Screen Digest*, who use and model data supplied by the manufacturers and their national or European professional organisations (European Association of Consumer Electronics Manufacturers - EACEM).

The Observatory's data on audiovisual companies are based on statistics gathered by IDATE (Montpellier, France), one of our partners, whose industrial database has been collecting business reports and balance sheets from over a 1000 communication groups in the world. We

were able to add additional information to the IDATE file through the contribution of the Data and Reference Centre of the EBU. The data obtained from the balance sheets and income statements of audiovisual companies are one of the most reliable ways of obtaining relatively accurate, regular statistical series for a spectral analysis of the market. Nevertheless, it still remains difficult to make a comparison of the different companies when one considers the diverse nature of the audiovisual sector and the different ways in which the companies present their accounts and the breakdown of their various activities. Problems can also be encountered when trying to obtain data on certain kinds of smaller company (independent production companies, service companies, etc.) and whole sections of the audiovisual sector lack statistical coverage.

The work carried out by the various national bodies (national cinema centres, national statistics institute, professional organisations and the trade press) means there is a fair amount of statistical information available on the cinema sector as regards production volumes, distribution and cinema operations. The Observatory worked hand in hand with these national sources to gather data on the main indicators for the period 1985-93 and, for some countries, up to the first half of 1994. Most of the indicators are familiar and commonly used, even though there are wide differences in how they are computed. There still remain grey areas, which should be looked into later: the number of companies active in the sector, the level of investment, the number of European co-productions, broadcasting of films on television, etc.

Any official statistics for the video and new media sector are practically inexistant. The only major sources are the professional publisher and distributor associations. The Observatory was able to make use of the recent work carried out by *Screen Digest* in collecting and synthesising information for western Europe, in collaboration with the International Video

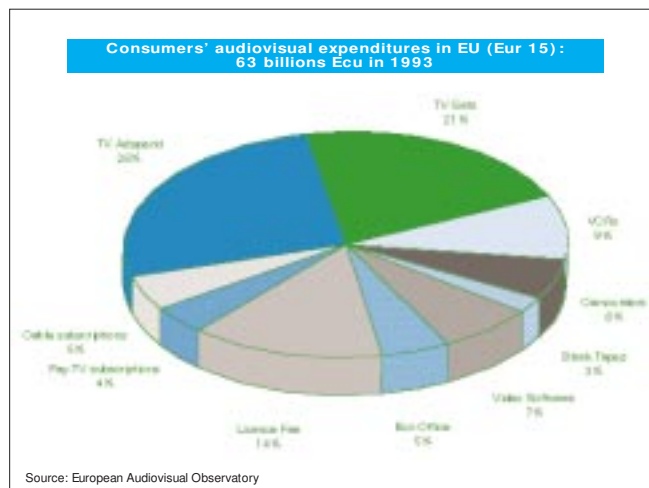


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Federation and Programme Media's EVE project. However, central and eastern Europe remain largely unknown territory. Piracy is of such proportions in this part of Europe that only the MPAA, representing the interests of the American majors, is prepared to attempt a statistical analysis of the industry's loss of earnings. Data for new optical-disc based technology (LaserDisc, CD-I, CD-Video, CD-ROM, 3-DO) and video games are firmly in the hands of the manufacturers. Most of these products, unlike the video cassette, which is now approaching its period of maturity, are still in their launch phase: published data appear therefore within a promotional context, which does not make for transparency.

In order to organise its statistical analysis of television, the Observatory has set up the Persky database containing basic information covering all television organisations broadcasting on a regional, national or European scale in member states (see the Observatory file on statistical databases). There are, unfortunately, several problems to be overcome when it comes to making a European comparison, due to the heterogeneous way in which the national television systems are structured: for example, a Flemish regional television channel covers two or three average-sized towns, whereas German regional public-service channels are mostly broadcast by satellite and can therefore be watched not just in all of Germany, but also over much of Europe. The estimated potential audience could provide the basis for objective comparisons, but the broadcasters are not always very explicit when it comes down to giving audience figures for their channels.

Measuring audience viewing figures is, statistically speaking, the most advanced area in the television sector: these figures are now of major strategic importance in determining where advertising budgets will be spent, the make-up of the programme grill, rights of purchase, the salaries of the star presenters, etc. Some organisations are ready to spend



considerable sums to obtain these data. A working party, including broadcasters, advertisers and research organisations, has already looked at the subject of pan-European harmonisation of audience viewing-figure measurement. We have worked alongside Eurodata-TV, the international department of Médiamétrie, to draw up basic data relating to TV viewing figures for most western European countries: average viewing time, daily reach: audience market share for the day as a whole and during prime time. The measurement of audience viewing figures is still in its trial stages in central and eastern Europe, but it has still proved possible to present the most recent data for the different member states of the Observatory.

Work carried out by the Statistical Group of the EBU has produced a computer programme to harmonise the analysis of programme grills (ESCORT 2.3) by allowing systematic classification of programmes into specific categories. Thanks to the EBU's work, we now have an analysis, according to programme type, of the programmes broadcast by just about all public service organisations. Data relating to private channels' programmes are also available in some countries, but they are not yet harmonised according to the EBU model. The Observatory has set up a methodological workshop for questions con-

cerning the gathering of data related to the production and distribution of television programmes. This workshop aims at drawing up a consensus between the various organisations that collect the data as to common definitions and classifications.

The European Advertising Tripartite launched a gradual harmonisation process for the statistical analysis of advertising budgets back in the mid-1980s. The tripartite is a professional body that includes all three sectors of the advertising sector (agencies, advertisers and media) and draws up statistics for western Europe, while aiming to eliminate factors causing distortion (counting small ads, discounts and agency expenses, etc.) between national sources. For central and eastern Europe, where the advertising market is undergoing full development, the gathering of data, carried out by a few large international agencies, is still going through a trial period.

A.L.

Statistical subtleties

The yearbook allows the record to be put straight over certain claims or misconceptions relating to the audiovisual sector:

"Turnover in the video industry in western Europe went down by 10,8% between 1992 and 1993". This claim is not true if we take the turnover computed according to the exchange rate between the dollar and the European currencies. Turnover as calculated by *Screen Digest*, went down from 6,6 thousand million dollars in 1992 to 5,9 thousand million in 1993. However, if the same figures are considered in ecus, turnover has gone up from 4,6 thousand million ecus in 1992 to 4,9 thousand million ecus in 1993, in other words an increase of 7%.

"The United Kingdom is the European country with the greatest number of major audiovisual companies": the European classification of companies according to corporate "audiovisual" turnover indicate that of these companies, 23% were British, as opposed to 19 French and 16 German companies. On the other hand, the German companies account for 26% of the total turnover of the top 100 companies, while British companies only have 25% and French companies 12%.