

THE FRAGMENTED FRAGMENTATION
The diversity of regional television in Europe

Presentation by André Lange for the 19th

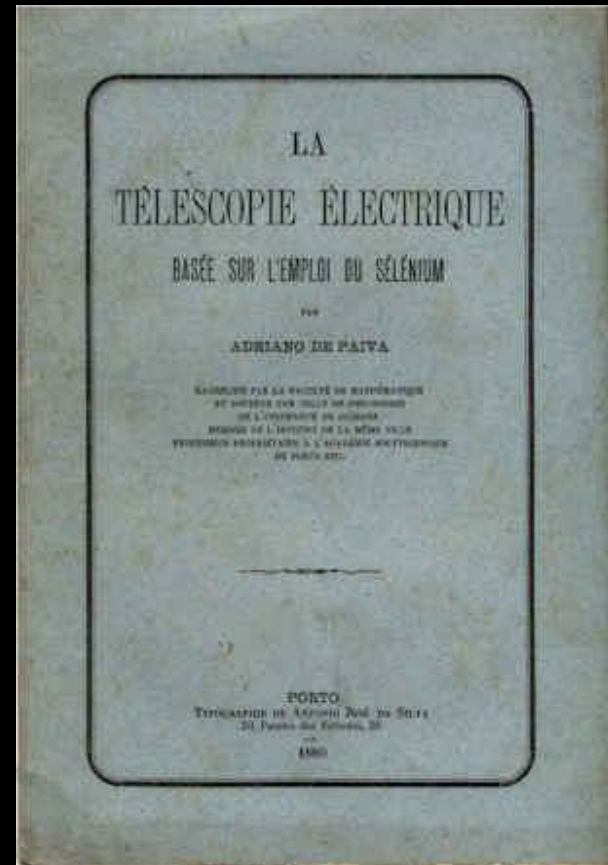
Conference of CIRCUM Regional
(Porto, 21-23 June 2001)

<http://www.obs.coe.int>



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

ADRIANO DE PAIVA, *La télescope électrique
basée sur l'emploi du sélénium*, Porto, 1880



"Avec ces deux merveilleux instruments (*le téléphone et le télélectroscope*), fixe sur un point, l'homme déploiera à toute l'extension du globe les facultés visuelle et auditive. L'ubiquité ne sera plus une utopie, elle sera une réalité parfaite.

Alors, partout à la surface de la terre, se croiseront des fils conducteurs, chargés d'une mission de la plus haute importance ; ils seront les conduits mystérieux qui apporteront à l'observateur les impressions subies par les organes artificiels que le génie humain aura réussi à transporter à toutes les distances. Et de même que la complexité des filaments nerveux peut donner l'idée de la perfection supérieure d'un animal, ces filaments métalliques, nerfs d'une autre espèce, attesteront sans doute le degré de civilisation du grand organisme qu'on appelle - l'humanité. ”

Adriano de Paiva, 1878

WHAT DO WE CALL REGIONAL TELEVISION ?

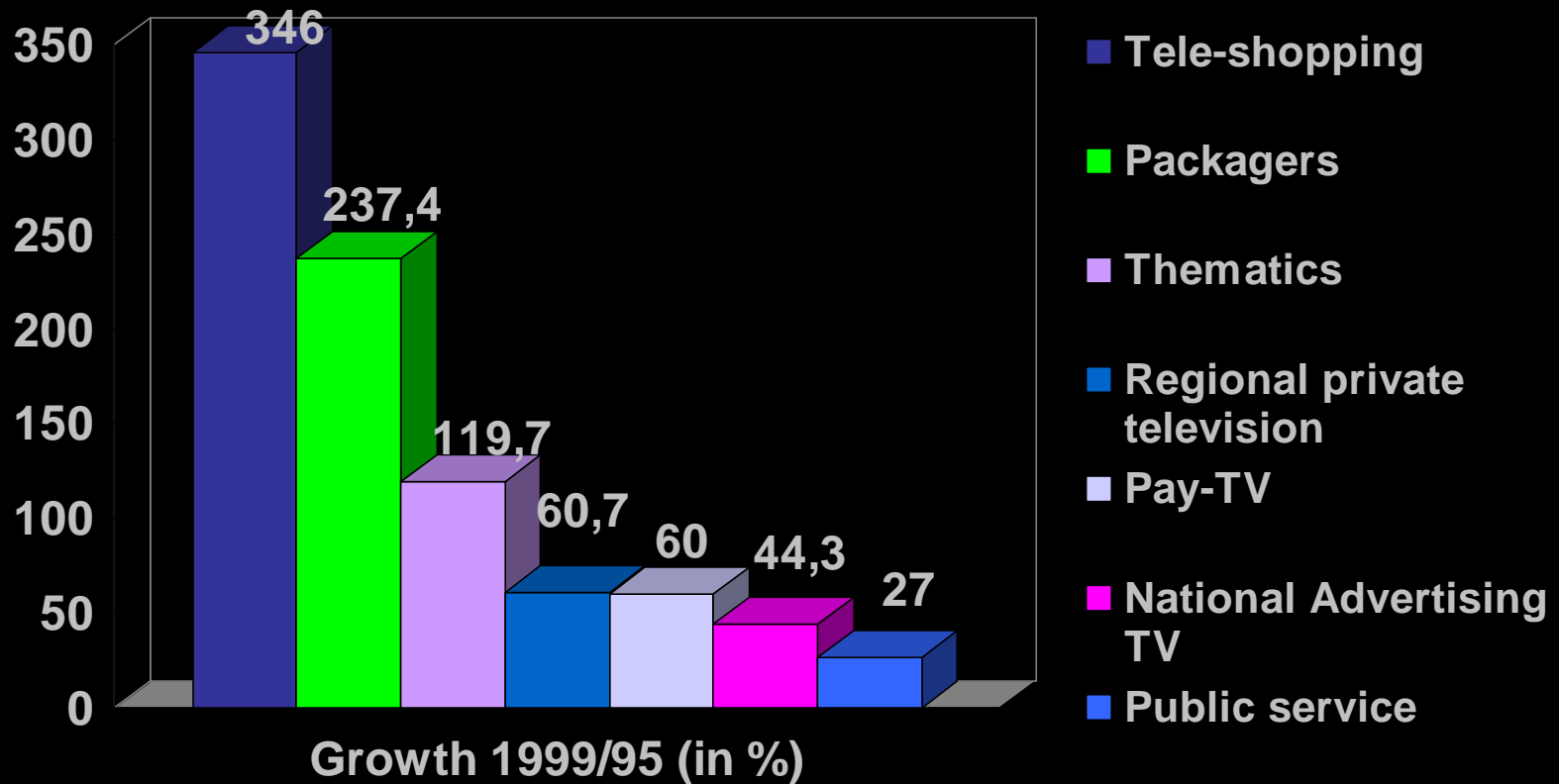
- **No European definition of regional television**
- **We consider as regional television all form of programmes targetting a geographical audience of an infra-national level**
- **Only a typology based on potential audience could provide a more precise and operational comparative analysis (in particular to compare small States television, Community, regional and local stations)**

THE VARIOUS MODELS OF REGIONAL TELEVISION IN EUROPE

- **NETWORK OF REGIONAL STATIONS** : *DE (ARD), GB (ITV)*
- **NATIONAL PUBLIC CHANNELS WITH REGIONAL WINDOWS** : *AT , BG, CZ, DK, ES, FI, FR, GB, GR, HU, IT, NO, PL, SE*
- **PRIVATE TELEVISIONS WITH REGIONAL WINDOWS** : *DE, FR, SE*
- **COMMUNITY PUBLIC ORGANISATIONS** : *BE, DE, ES*
- **COMMUNITY PRIVATE CHANNELS** : *BE, DE*
- **NATIONAL ORGANISATIONS WITH LINGUISTIC SERVICES** : *CH, FI*
- **REGIONAL INDEPENDENT PUBLIC CHANNELS** : *GB (Wales), NL*
- **PRIVATE LOCAL/REGIONAL STATIONS** : *AT, BE, BG, CH, ES, FR, GR, HU, IE, IT, NO, PT, SE, SI, SK, TR*
- **SYNDICATION PROVIDING PROGRAMMES TO LOCAL/REGIONAL STATIONS** : *IT, RU*
- **REGIONAL STATIONS ON SATELLITE** : *AT, ES, FR, GB, IT, PL*

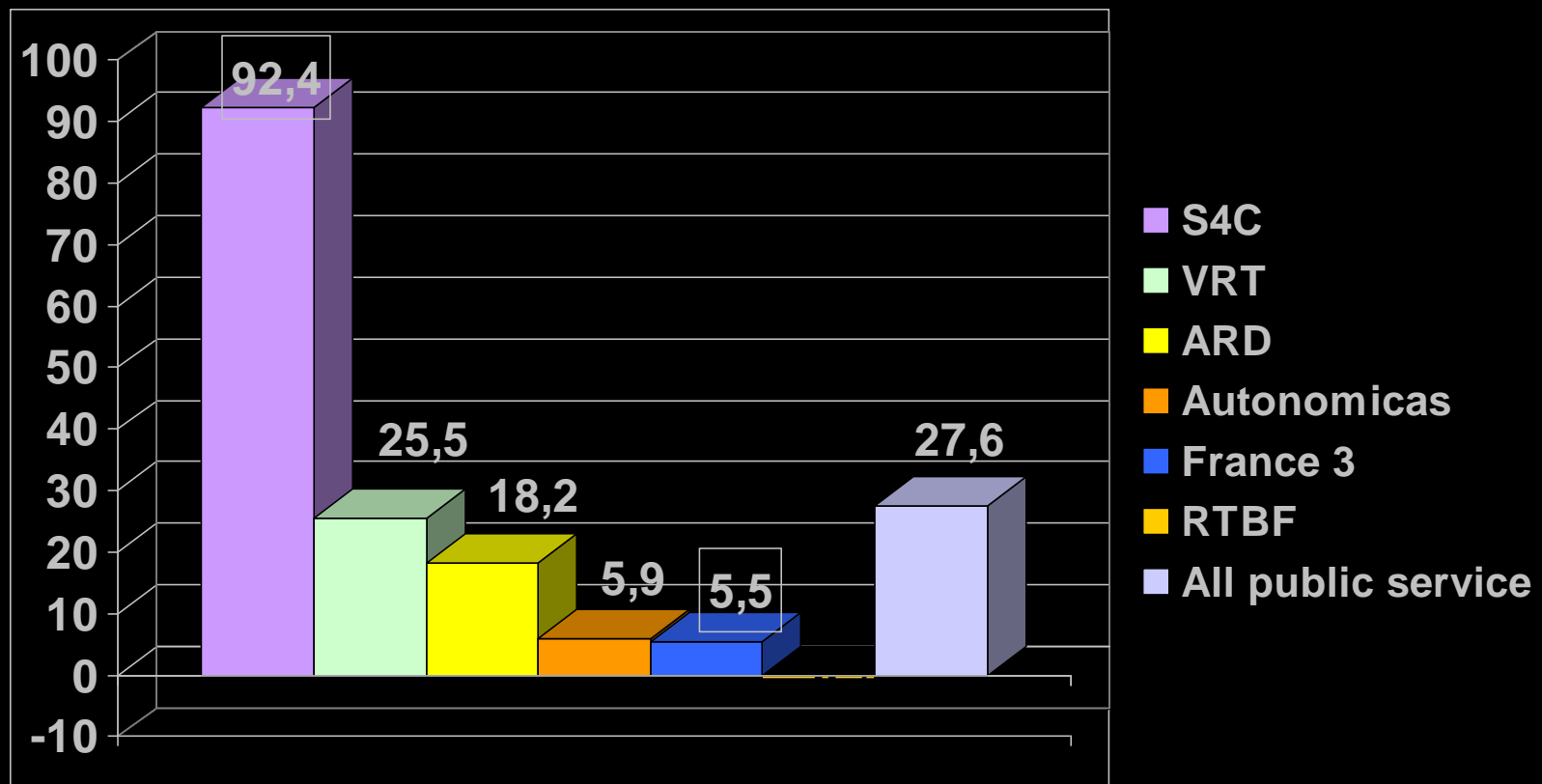
RATE OF GROWTH 1999/1995 OF THE VARIOUS KIND OF TV COMPANIES (in %)

Source : European Audiovisual Observatory



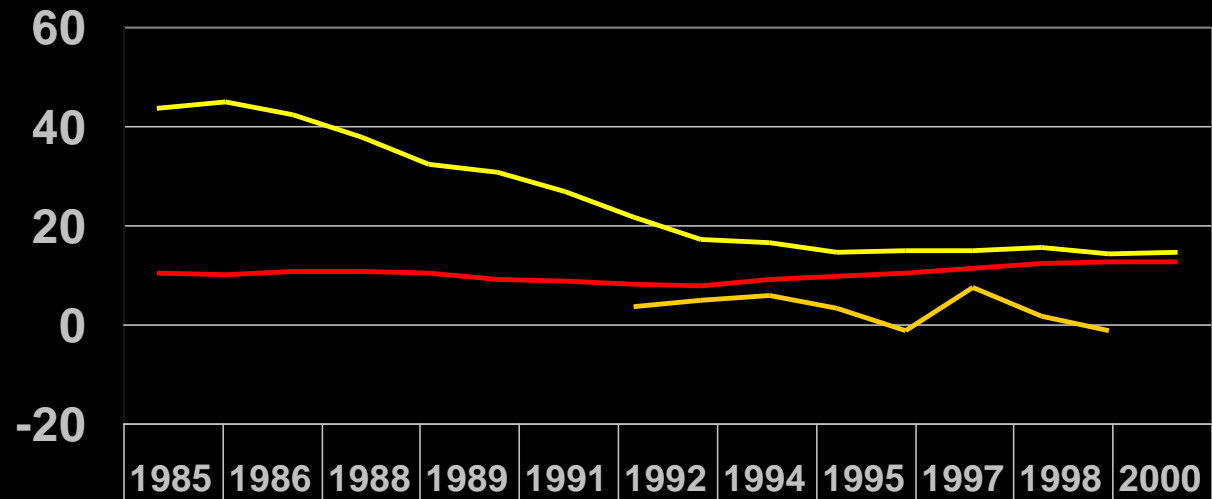
PUBLIC REGIONAL OR COMMUNITY TELEVISIONS : RATE OF GROWTH OF OPERATING REVENUES (1999/95), in %

Source : AMADEUS / OBS



DE - ARD - TV AUDIENCE MARKET SHARES AND PROFIT MARGIN (1985-2000), in %

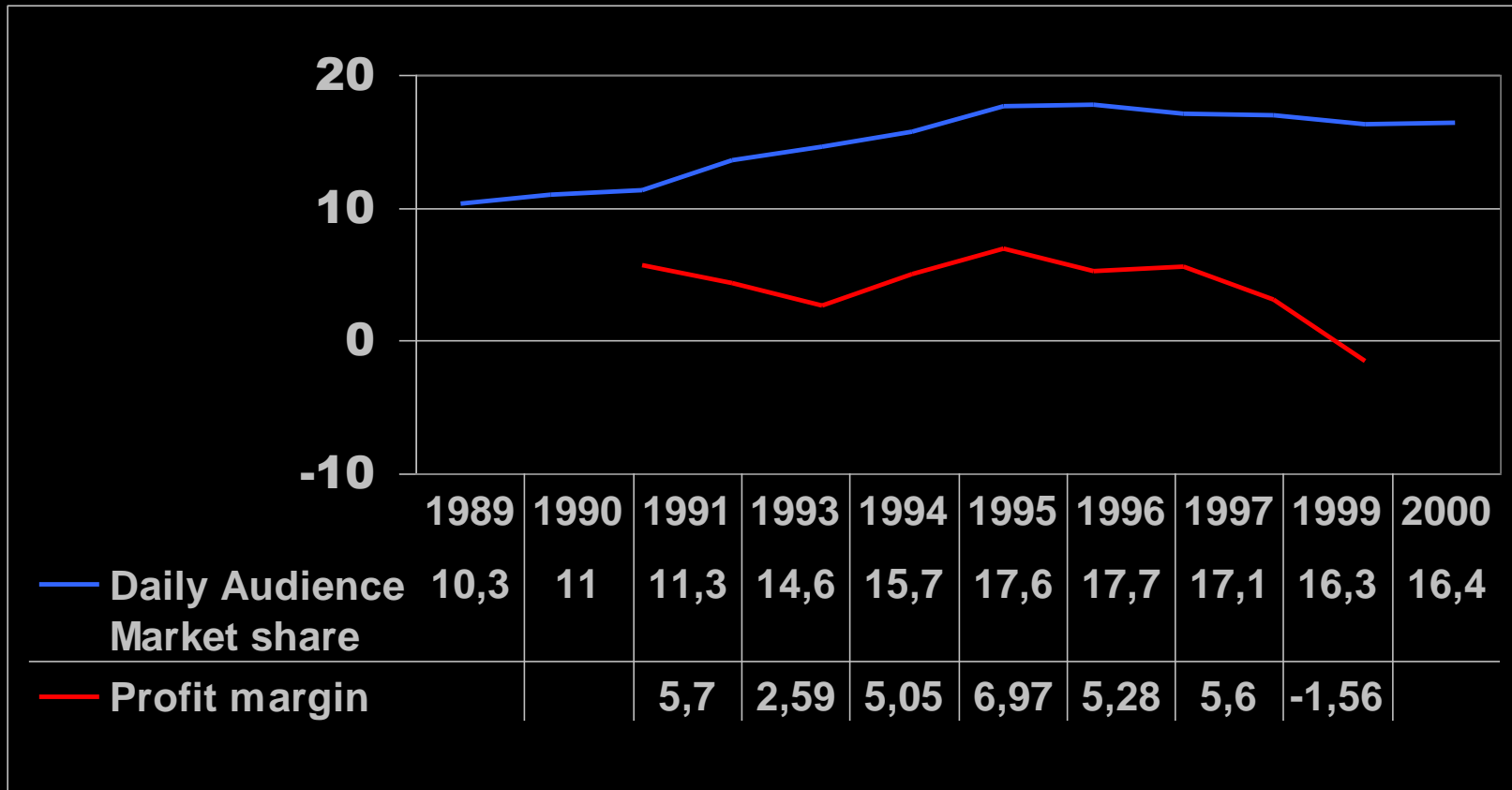
Source : Gfk / Eurodata-TV & AMADEUS/OBS



	1985	1986	1988	1989	1991	1992	1994	1995	1997	1998	2000
— ARD 1 Daily audience market share	43,4	44,9	37,9	32,4	26,9	21,7	16,3	14,6	14,7	15,4	14,4
— ARD III Daily audience market share	10,2	10,1	10,7	10,4	8,8	8,1	8,9	9,7	11,3	12,3	12,6
— ARD Profit margin						3,5	5,76	3,36	7,53	1,61	

FR - FRANCE 3 AUDIENCE MARKET SHARE(1989-2000), in %

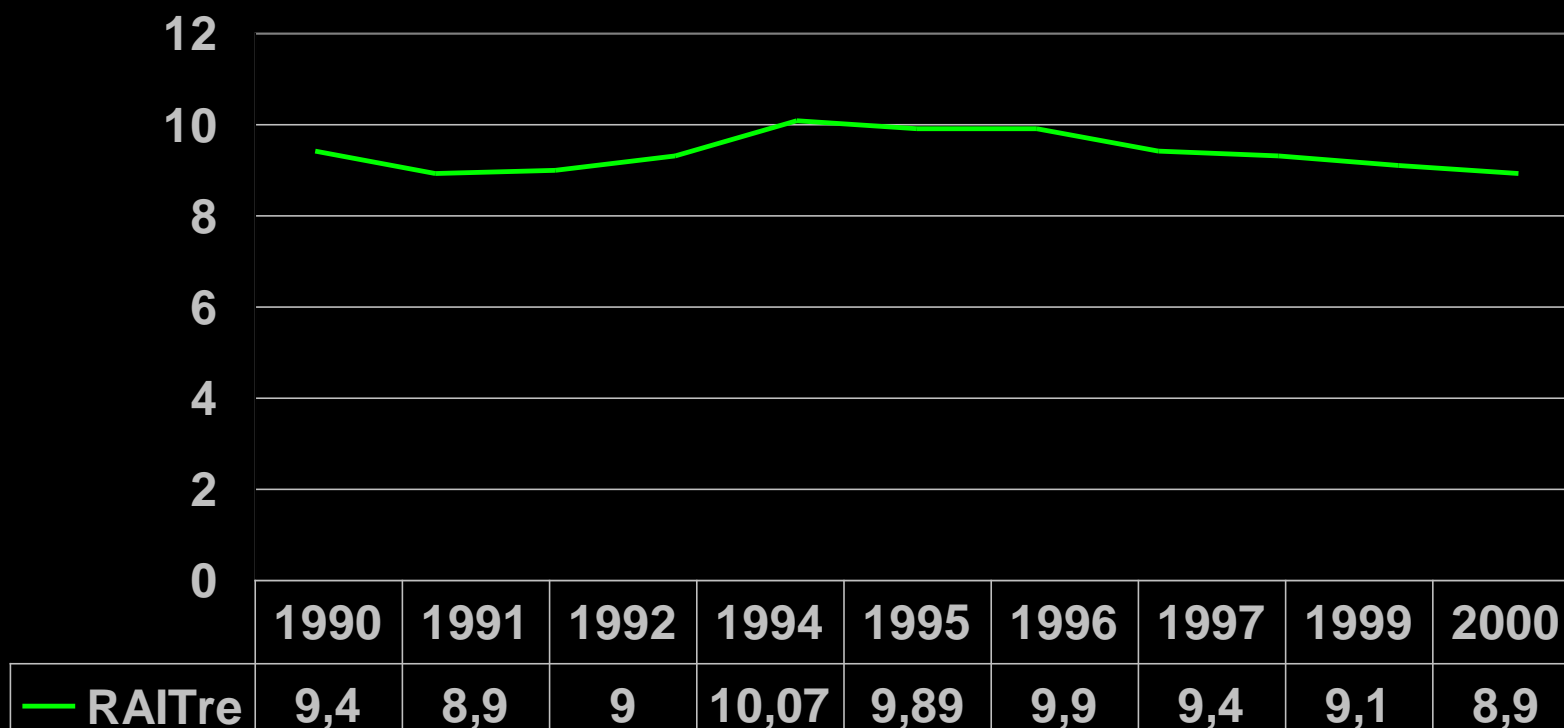
Source : Médiamétrie /Eurodata-TV and AMADEUS/OBS



IT - RAI Tre DAILY AUDIENCE MARKETSHARE (1990-2000)

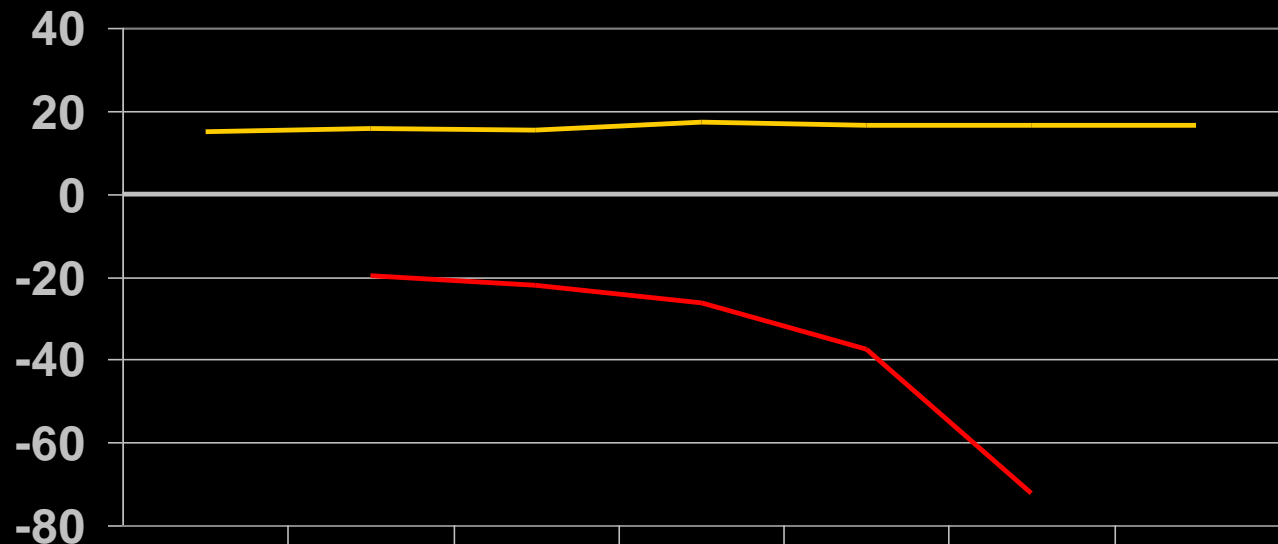
in %

Source : AGB Italia / Eurodata-TV



ES - DAILY AUDIENCE MARKET SHARE AND PROFIT MARGIN OF AUTONOMIC TELEVISIONS (1994-2000) in %

Source : Eurodata-TV & AMADEUS/OBS

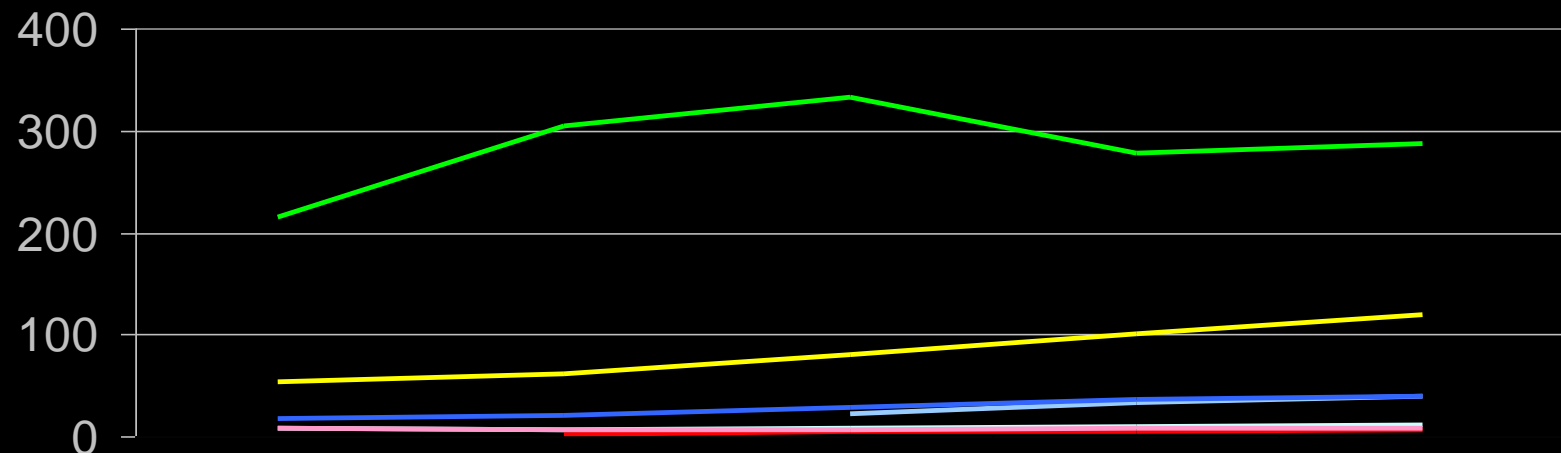


	1994	1995	1996	1997	1998	1999	2000
— Daily Audience Market share	15,1	15,5	15,3	17,4	16,6	16,4	16,6
— Profit margin		-19,79	-22,24	-26,41	-37,73	-72,41	

OPERATING REVENUES OF PRIVATE REGIONAL TELEVISIONS (1995-1999)

Millions EUR

Source : AMADEUS / OBS

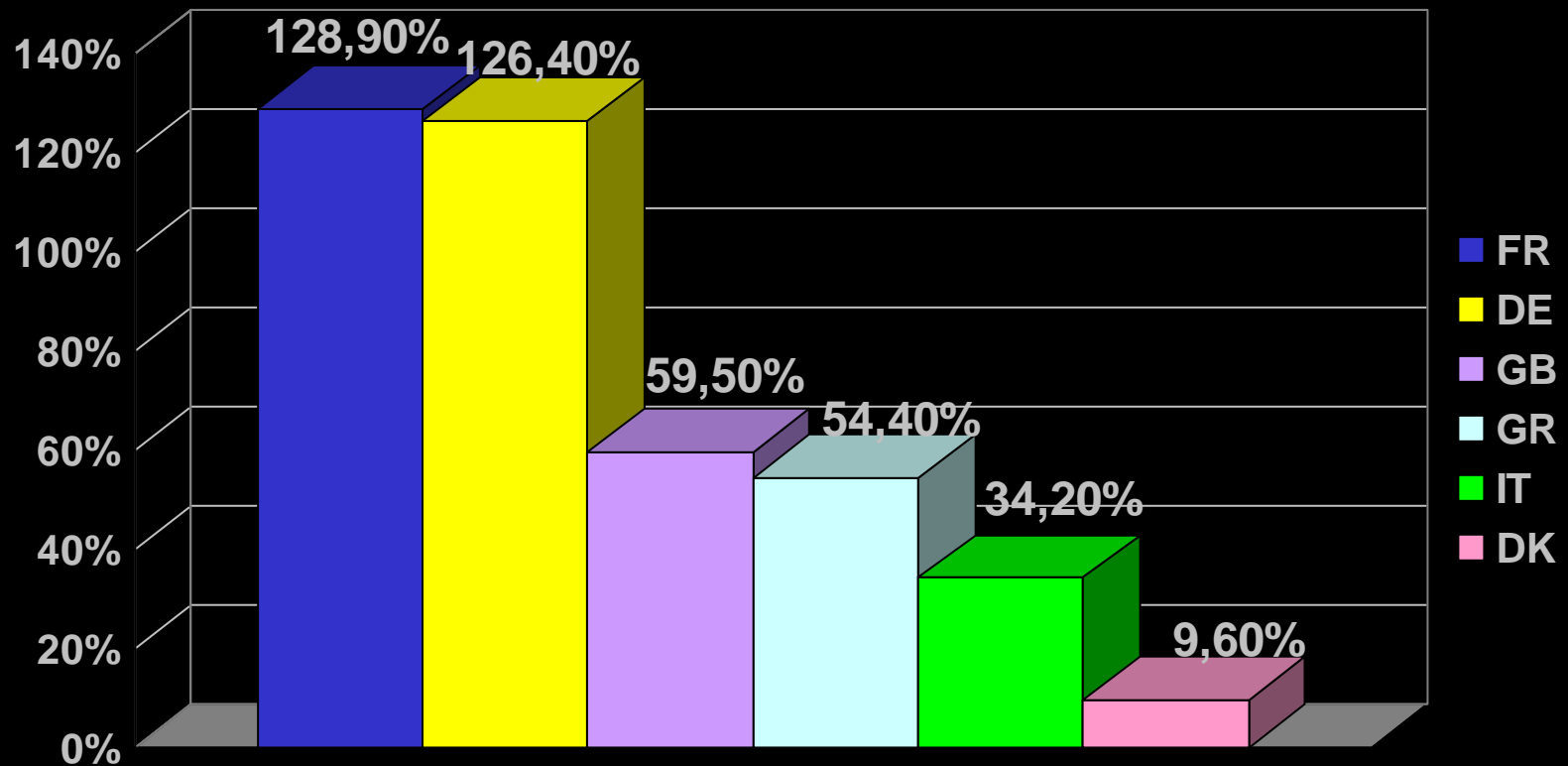


	1995	1996	1997	1998	1999
IT	214,4	304,8	332	277,8	287,7
DE	53	61	80	101	120
SE	n.c.	n.c.	22,3	33,2	39,9
FR	17,3	20,5	28,3	36,5	39,6
GR	7,1	6,5	8	9,4	11
AT		0,8	4,8	5,3	5,8
DK	7.3	5.9	6.7	7.5	8

GROWTH OF OPERATING REVENUES OF PRIVATE REGIONAL TELEVISIONS

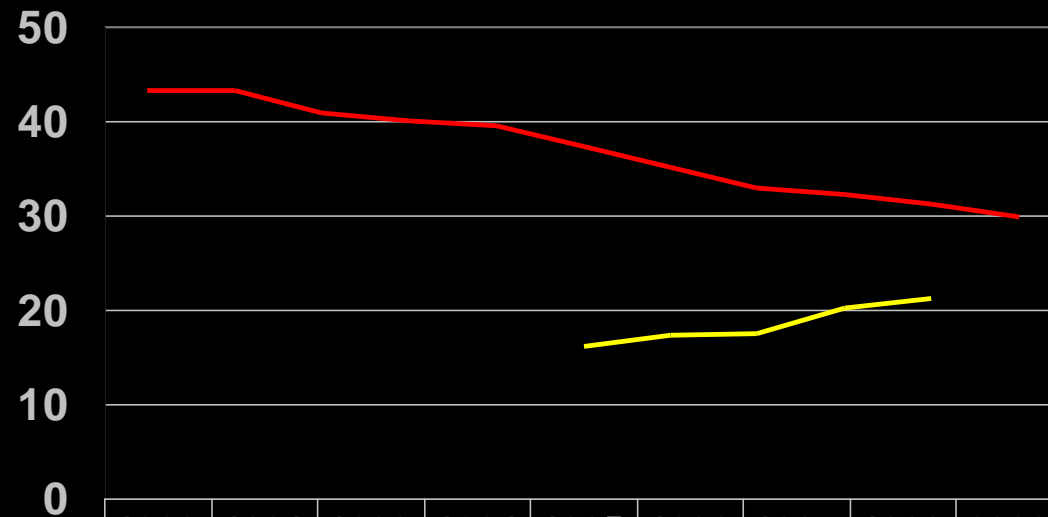
(1999/95) , in %

Source / AMADEUS / OBS



GB : ITV AUDIENCE MARKET SHARE AND PROFIT MARGIN (1990-2000), in %

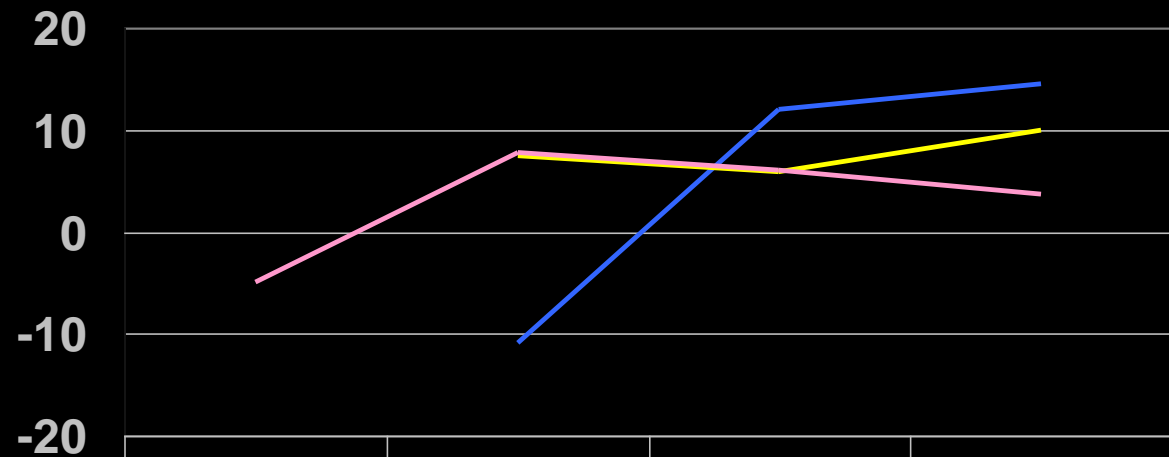
Sources : AGB-Eurodata-TV & AMADEUS/OBS



	1990	1991	1992	1994	1995	1996	1997	1999	2000
— Daily Audience Market share	43,3	43,2	40,8	39,5	37,3	35,1	32,9	31,2	29,9
— Profit margin (14 regional companies)					16,09	17,37	17,4	21,14	

DK & SE - PROFIT MARGIN OF TV2 & TV4, in %

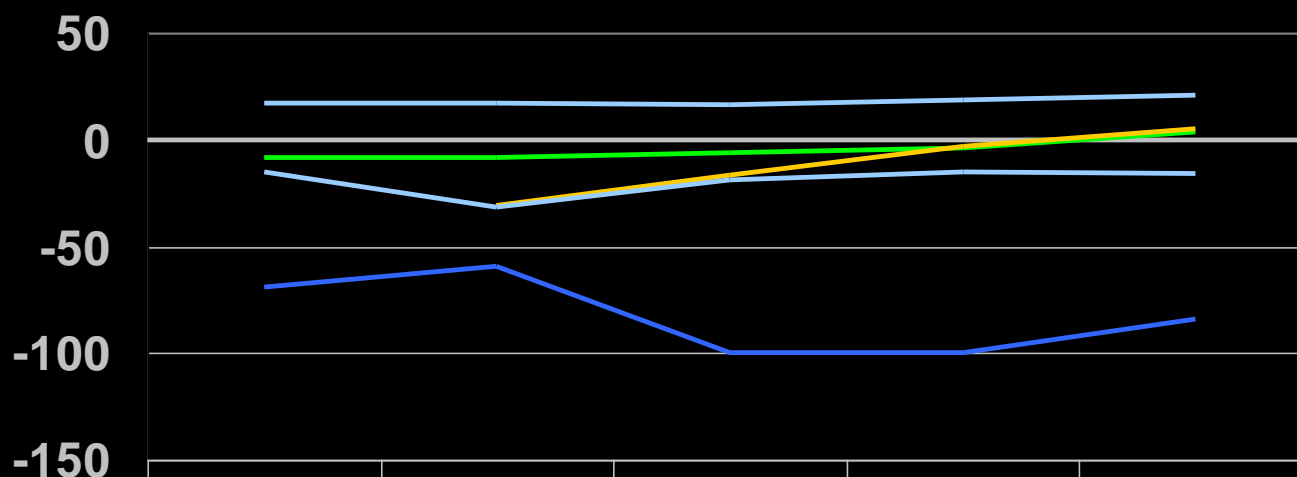
Source : AMADEUS / OBS



	1996	1997	1998	1999
— 8 regional stations TV4		-10,97	11,98	14,5
— TV4		7,39	5,9	9,96
— TV2 - DK	-4,97	7,78	6	3,66

PROFIT MARGIN OF PRIVATE LOCAL/REGIONAL TV STATIONS IN SOUTHERN EUROPE (1995-1999), in %

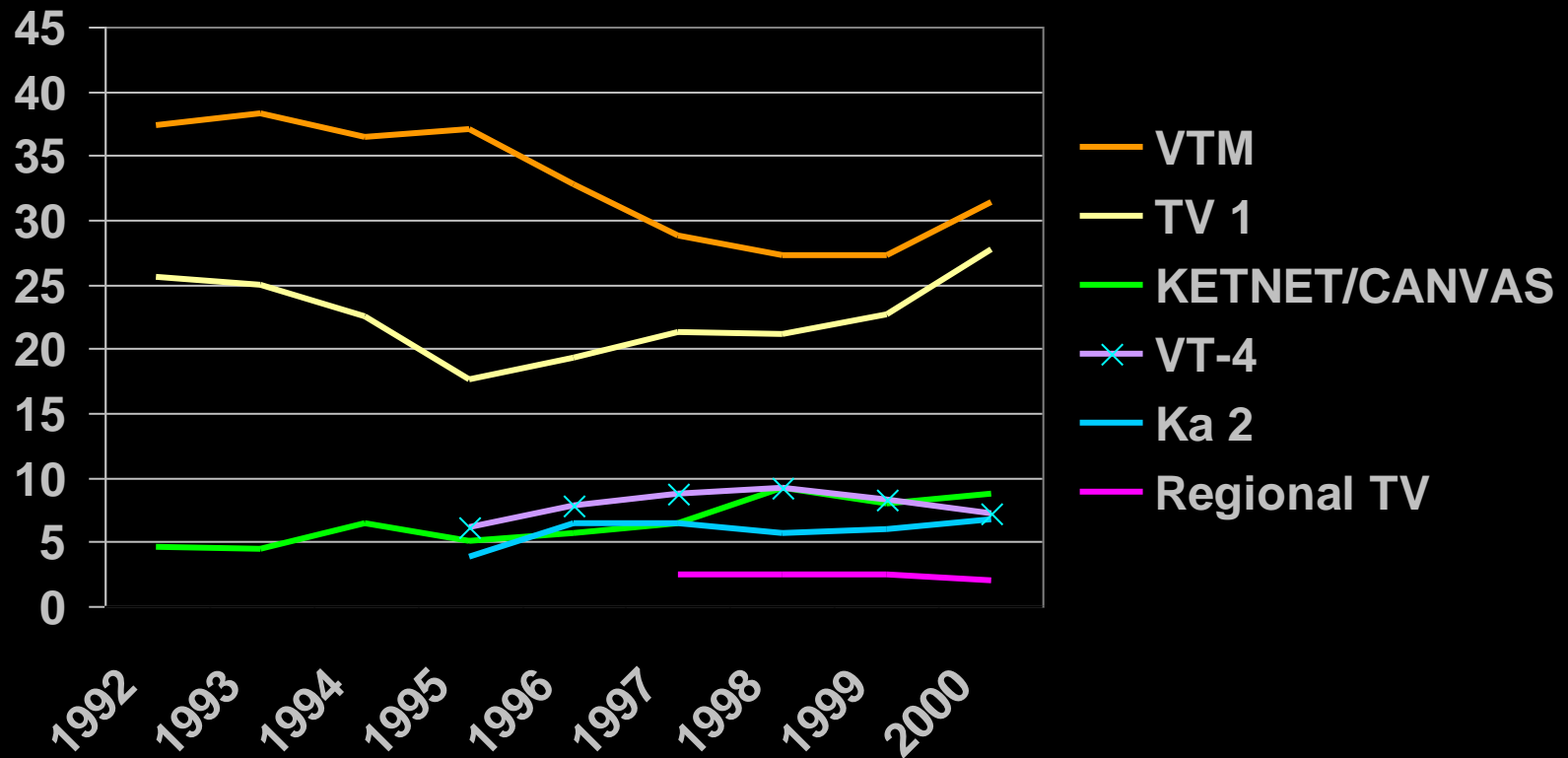
Source : AMADEUS - OBS



	1995	1996	1997	1998	1999
FR (DOM-TOM)	17,31	17,17	16,37	18,67	21,09
IT (sample)	-8,72	-8,61	-5,92	-3,69	3,51
ES (sample)	-15,28	-30,54	-16,72	-2,83	4,88
GR	-69,1	-59,57	-100	-99,68	-84,28
FR (Metropolitan)	-69,1	-59,57	-100	-99,68	-84,28

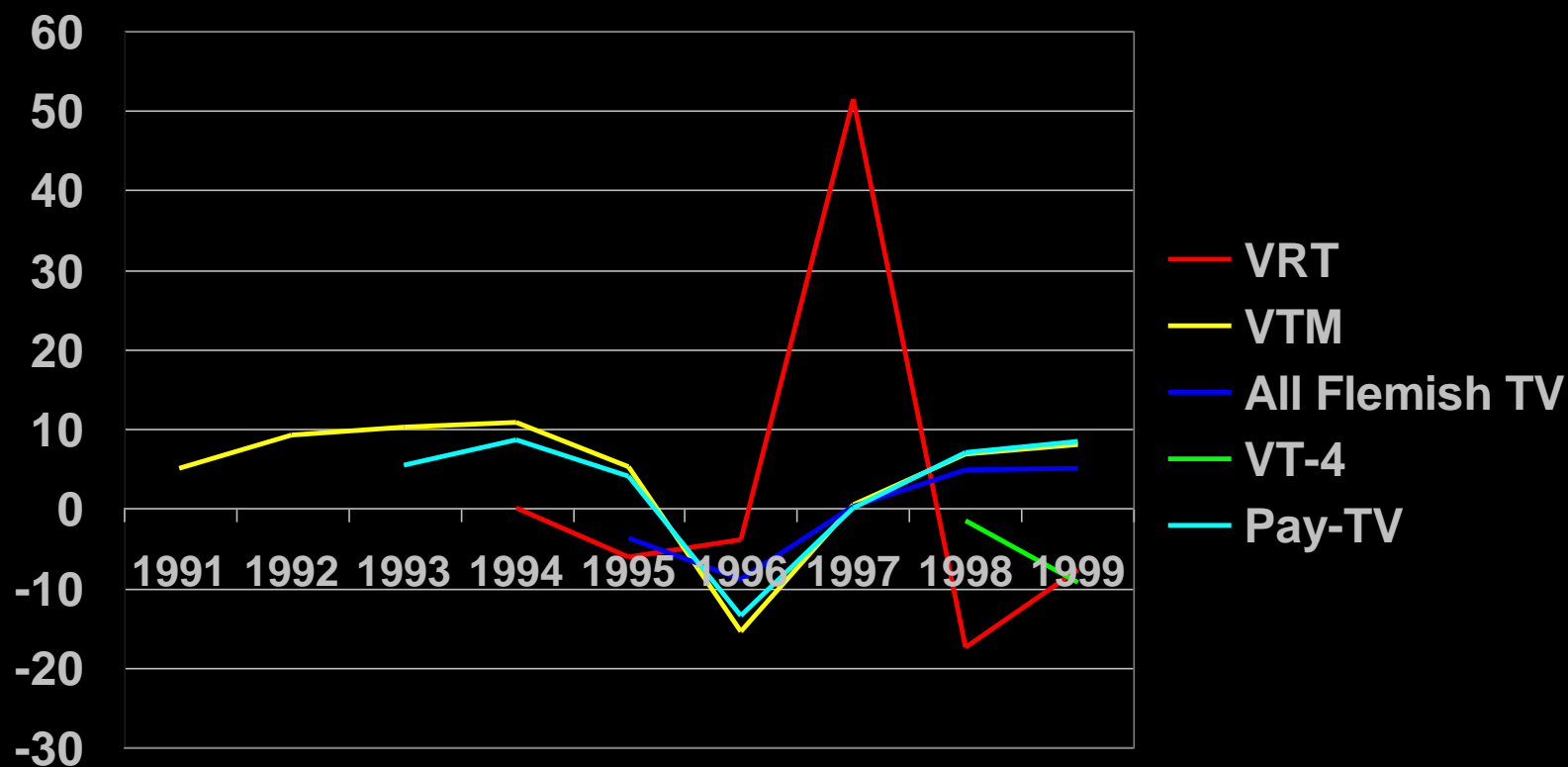
BE - MARKET SHARE OF FLEMISH TELEVISIONS (1992-2000)

Source : Aspemar-Audimétrie/Eurodata-TV



BE - PROFIT MARGIN OF FLEMISH TELEVISIONS (1991-1999)

Source / AMADEUS / OBS



NUMBER AND ORIGIN OF FILMS BROADCAST IN GERMANY AND SPAIN (1998)

Source : European Audiovisual Observatory

