MAVISE

Regional TV in the new European Audiovisual Panorama

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

Directorate General Communication

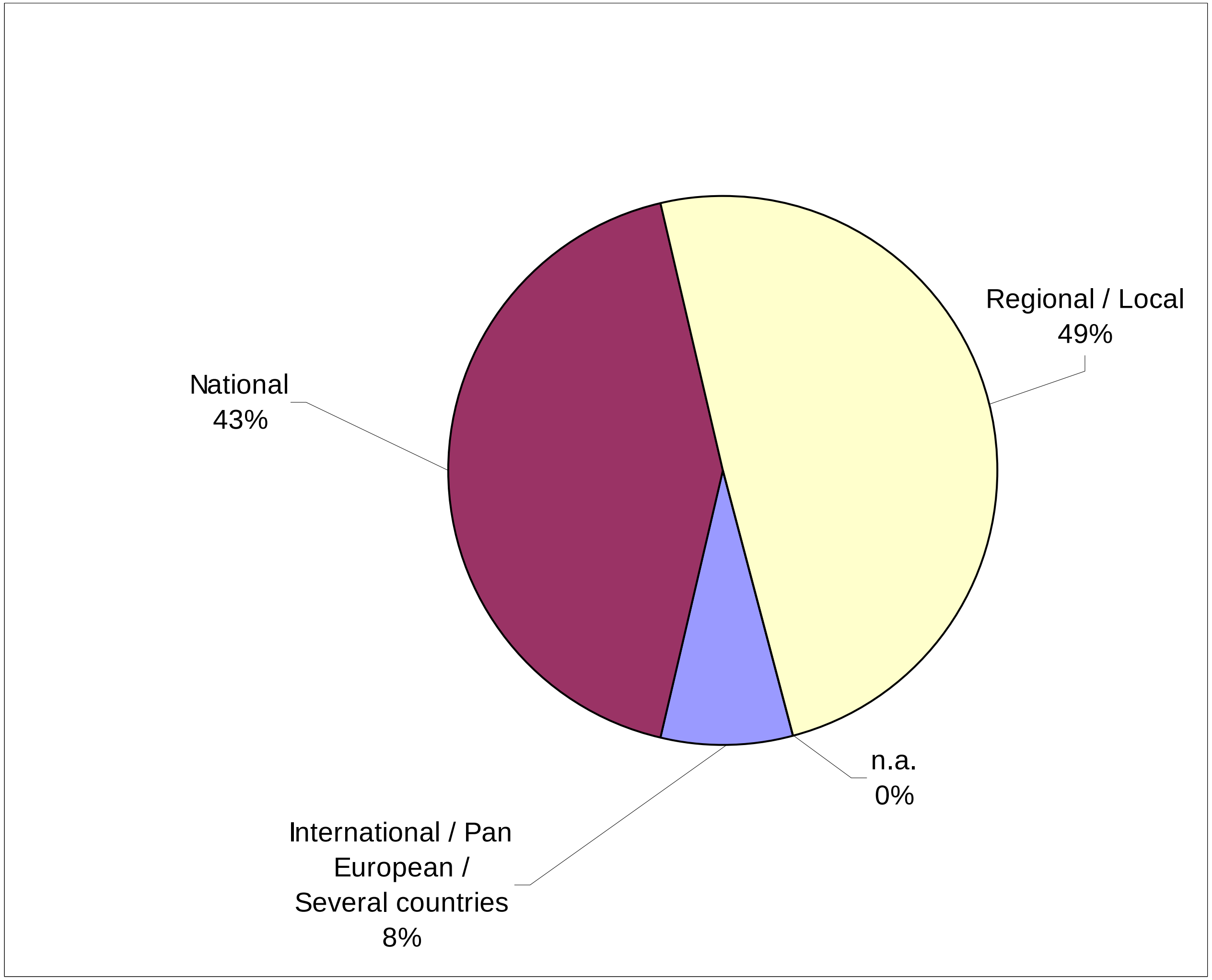
Overview of channels in Europe

The MAVISE data base deals with 29 national TV markets and includes 7456 television channels and 5494 companies (broadcasters, packagers, transmitters)

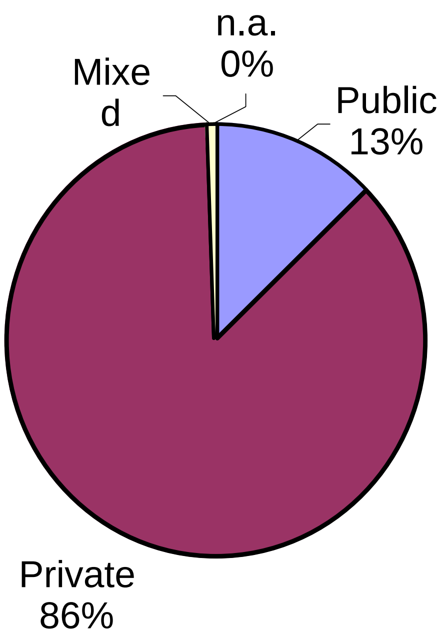
- Channels in Europe, by geographical target, statute, genre, country of establishment.
- Origin of regional and local channels
- Local/regional TV markets: ratio between channels/windows and households
- Types of regional/local/ windows television services available in different countries
(Source: MAVISE)

Television channels in Europe: targeting local and regional/ national/ international communities

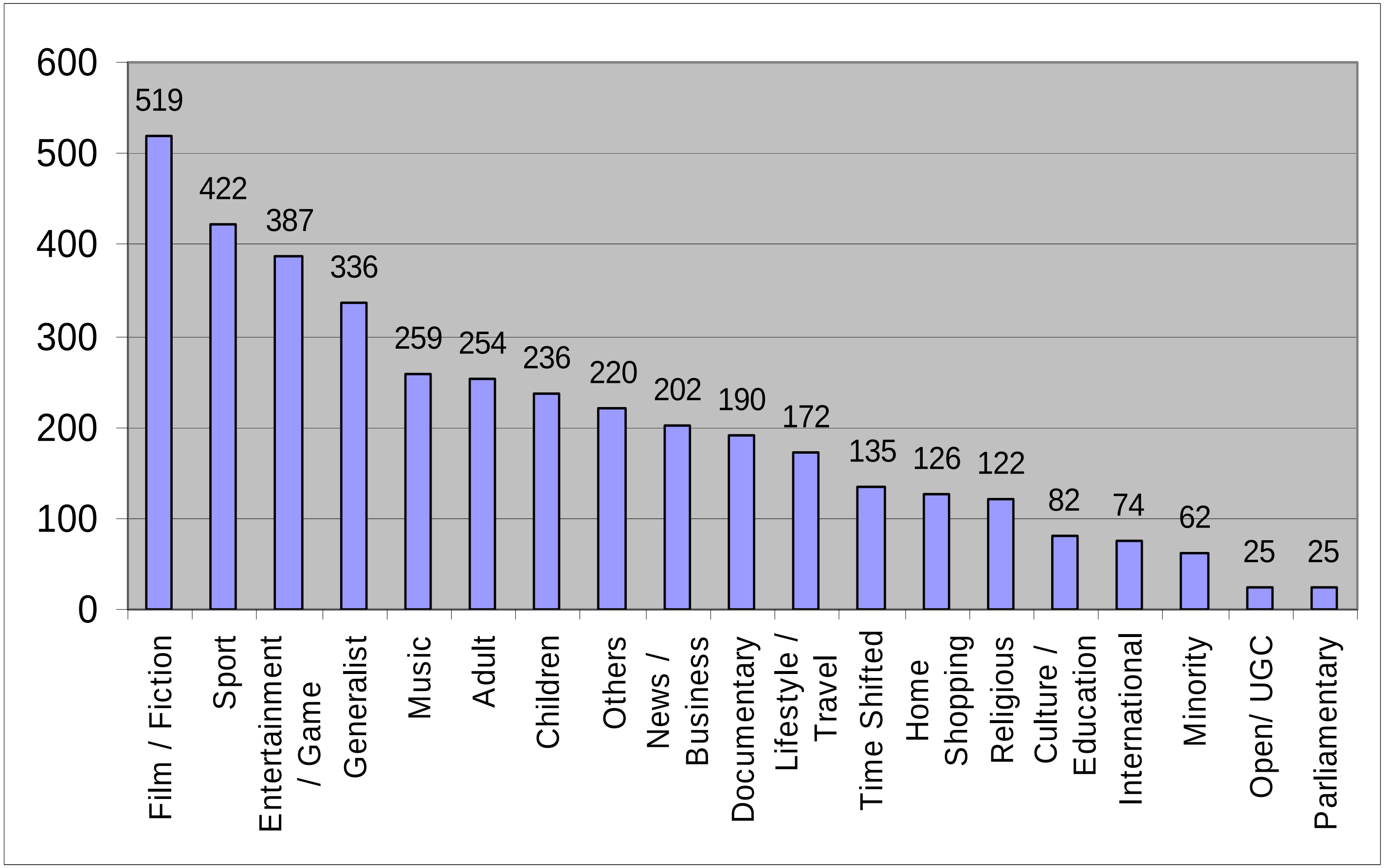
May 2010 (MAVISE database)



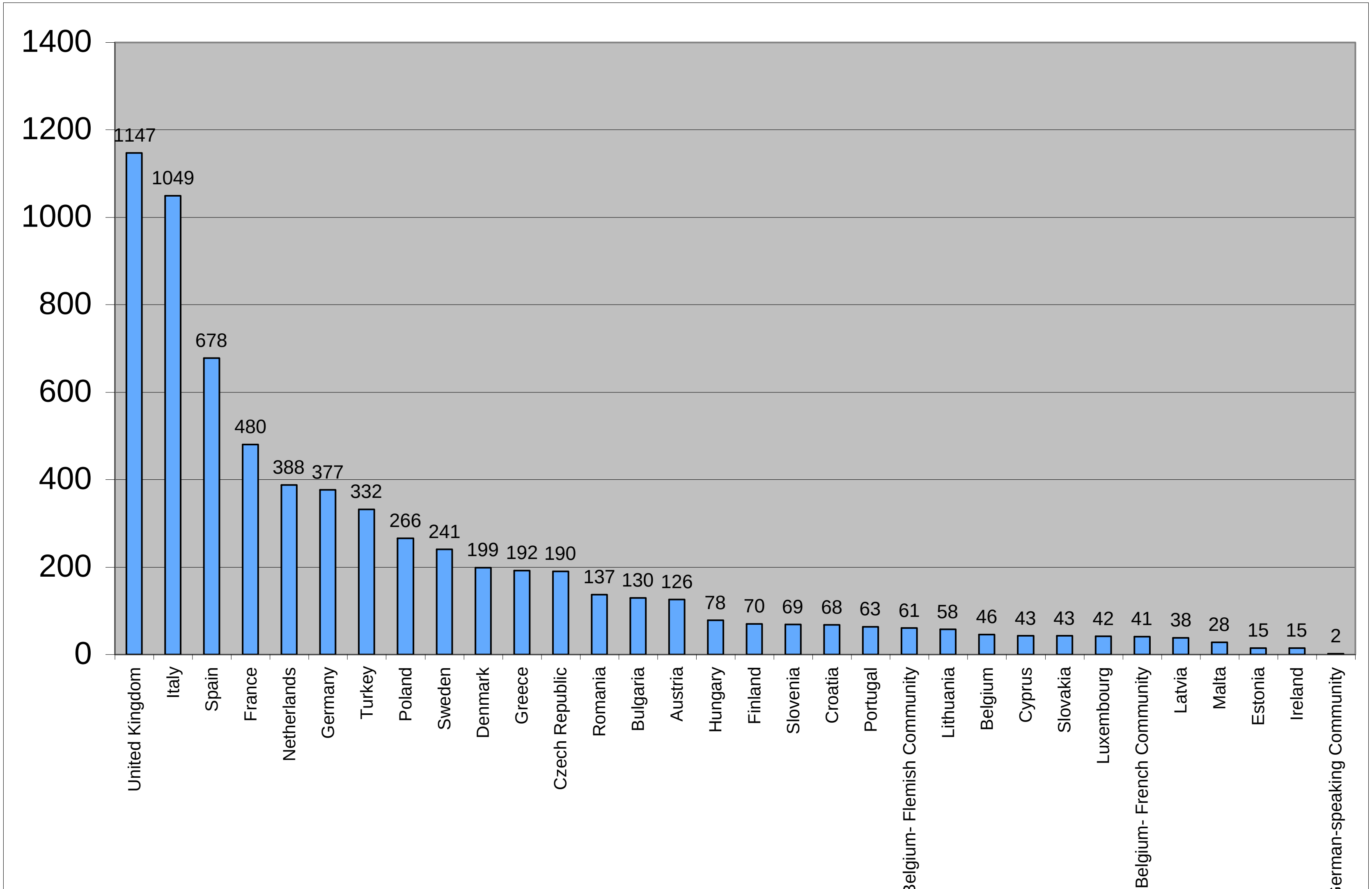
Breakdown of TV channels (EU 27 +2) by public/private



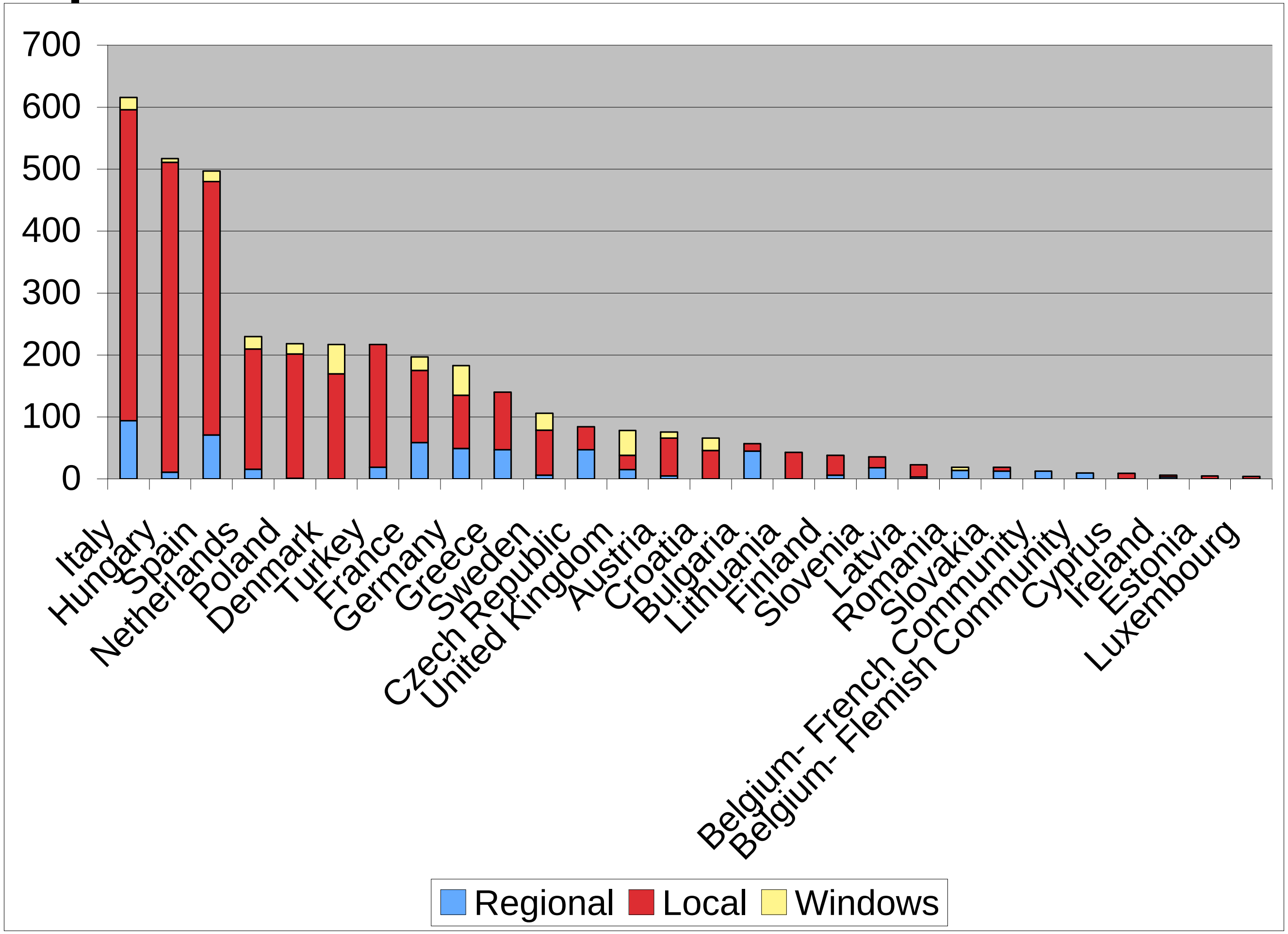
Genre of national channels in Europe (May 2010)
Source: MAVISE database



Breakdown of European TV channels established by countries (EU 29) by country of establishment, windows not included (MAVISE)



Origin of regional and local channels in Europe (EU + Croatia and Turkey)



Local/regional TV markets: ratio between channels/windows and households

(Source: MAVISE database, and Yearbook of the European Audiovisual Observatory)

Local / regional TV channel for every 10 - 20 000 households	**Local / regional TV channel for every 30 - 60 000 households**	**Local / regional TV channel for every 80 - 100 000 households**	**Local / regional TV channel for every 200 - 300 000 households**	**Local / regional TV channel for every 400 - 900 000 households**
Denmark, Spain, **Hungary,** Slovenia, Slovakia	Austria, Bulgaria, Cyprus, Czech Republic, Croatia, Finland, Greece, Italy, Lithuania, Luxembourg, Latvia, Netherlands Poland , Sweden	France, Turkey	Belgium, Germany, Ireland, Romania	Estonia, UK, Malta, Portugal

Types of regional/local/ windows television services available in different countries (EU27)
(Source: MAVISE)

Public service regional (and autonomous) channels	Germany, Spain, UK (Federalist/ devolved/ autonomous states)
Public service windows	Austria, Bulgaria, Denmark, France, Germany, Hungary, Italy, Poland, Romania, Spain, Sweden, UK,
Private windows	Bulgaria, Germany, Netherlands, Sweden
Public local channels	Denmark, France, Netherlands, Spain,
Mixed funding local	France, Belgium (French speaking), Hungary
Private local/ regional channels	Belgium (Flemish Speaking), Bulgaria, Cyprus, Czech Republic, Denmark, Germany, Estonia, Finland, France, Greece, Hungary, Ireland, Latvia, Lithuania, Netherlands, Poland, Portugal, Romania, Slovak R, Slovenia, Spain, Sweden, UK.
Municipal/local authority	Finland, Greece, Italy, Slovakia
Community/special interest/ non-profit/ open channels	Denmark, Germany, Hungary, Ireland, Slovenia,

Audiences and distribution

- Important distribution platforms in European media landscapes
- Important distribution platforms for local/ regional TV
- Audiences of national public service channels
- Audiences of all channels decreasing with the introduction of multi-channel TV.
- Levels of Digitisation/ Households receiving digital television at end of 2008

Importance of distribution platforms in the markets
(Source: European Audiovisual Observatory Yearbook 2009)

Cable	Belgium, Netherlands
Terrestrial	Spain, Greece
Cable/ Satellite	Austria, Bulgaria, Germany, Hungary, Luxembourg, Malta Romania, Slovakia
Terrestrial / Satellite	UK, Croatia, Italy, Turkey
Cable/ terrestrial	Denmark, Estonia, Finland, Latvia, Lithuania, Portugal
Terrestrial/ cable/ satellite	Czech Republic, Ireland, Poland, Sweden
Terrestrial/ IPTV/ satellite	France
Cable/ terrestrial/ IPTV	Slovenia
Terrestrial/ IPTV	Cyprus

Important distribution platforms for local/ regional TV (EU27) (Source: MAVISE)

Cable	Belgium, Estonia, Finland (3 on DTT), Hungary, Ireland, Netherlands (13 on DTT), Poland, Portugal, Romania (windows on DTT)
Terrestrial	Cyprus, Spain (170 of services on DTT), Greece (5-6 on cable), Latvia, Italy,
Mainly Cable/ some terrestrial	Austria, Bulgaria, Czech Republic, Germany, Finland, Slovak Republic,
Mainly terrestrial/ some cable	Denmark, Lithuania
Cable/ terrestrial	France, Sweden, Slovenia,
Terrestrial/satellite/ cable	UK (metropolitan channels on cable only)

Audiences of national public service channels (Source Eurodata/Mediametrie)

Audience share 2009	**Loss of audience PSB 2006-2009**
Denmark 65,1%	-8,6%
Finland 43,8%	*0 (audience shared with niche channels)*
Germany 43,2%	*(+0,3%)*
Italy 40,7%	-2,9%
Poland 40,7%	-3,4%
Austria 38,2%	-8,5%
Ireland 37%	-3,5%
Sweden 39,4%	-0,9%
Netherlands 33,9%	*(+1,1%)*
France 32,2%	- 6,4%
Czech Republic 28,1%	-2,7%
Portugal 29,8%	-0,1%
Slovenia 28,8%	-3%
Cyprus 21,7%	-0,7%
Spain 19,2%	-3,9%

Audiences of national public service channels continued
(Source Eurodata/ Mediametrie)

Audience share 2009	**Loss of audience PSB 2006-2009**
Slovakia 19,7%	-5%
Estonia 16,8%	-0,5%
Greece 16,6%	0
Latvia 16,4%	-1,5%
Lithuania 14,7%	-1,7%
Hungary 13,6%	-5% (measurements include thematic multi-channels)
Bulgaria 12,2%	-4,2%(measurements include thematic multi-channels)
Romania 7,3%	-14,7%(measurements include thematic multi-channels)

Levels of Digitisation/ Households receiving digital television end of 2008 (EU 27 average 58%)

(Source: European Audiovisual Observatory Yearbook 2009)

Very High **90-100%**	Finland, Sweden, Luxembourg, United Kingdom
High 50-70%	Austria, Germany, Denmark, Spain, France, Ireland, Italy, Malta,
Medium **30-50%**	Belgium, Cyprus, Czech Republic, Estonia, Netherlands, Poland, Portugal, Romania, Slovenia, Slovak Republic
Low **Less than 30%**	Bulgaria, Greece, Croatia, Hungary, Latvia, Lithuania,

Audience shares of regional channels and those with regional programming.

Channel	Daily market share 2009
ORF2	23,1%
TV2	29,3%
ERT3	3,8%
RAI3	8,9%
FR 3	11,8 %
TVE La Segunda	3,8 %
Autonomicas	13,9 %
BBC (Scotland, Wales, Northern Ireland)	4,6 %

Top programmes 2009: balance between information and entertainment (based on Eurodata TV Worldwide data)

Balance between news/info and entertainment	**Countries**
Top 5 programmes dominated by news, etc. Top 10 includes TV series, reality shows etc.	Austria, Belgium French , Latvia
Top 10 balance between news/ information and entertainment	Croatia, Czech Republic, Estonia, Finland, Germany, Ireland, Slovakia, Spain,
Top 10 mainly entertainment (some news and information)	Bulgaria, Cyprus, Denmark, France, Hungary, Italy, Lithuania, Netherlands, Poland, Portugal, Romania, Slovenia, Sweden
Top 10 programming dominated by entertainment (no news, documentary, politics)	Belgium Flemish, Greece, United Kingdom

Examples of regional news programmes and audience shares. (Source Eurodata Worldwide)

Programme	**Channel**	**Number of viewers (000s)**	**Audience share %**	**Rating %**
BUNDESLAND HEUTE	ORF2 Austria	1069,2	55	13,7
Události v regionech	CT1 Czech Republic	795,7	30,6	8,2
19-20 JOURNAL REGIONAL	France 3	3489,1	22,1	6,1
TELEWIZYJNY KURIER MAZOWIECKI	TVP2 Poland	1446,5	13,4	4
REGIONALA NYHETER (19:15)	SVT2 Sweden	760,2	31,9	8,6
GMTV LOCAL NEWS	ITV1 UK	1008,8	27,6	1,8

News

- There was a doubling of the number of news channels since 2005. The digitisation of networks has allowed an increase in distribution capacity. For example, there are now 16 news channels on the various digital terrestrial (DTT) networks. 33 of the 119 European news channels are public channels, almost one third. The public service broadcasters have therefore a strong presence in the field of news, despite the fact that taking all genres into account the public channels represent only 5% of all European television channels. Hence news continues to be a valuable content genre, and the public service channels continue to supply a greater proportion of news. (MAVISE OCTOBER 2009)
- “need to engage with audience and target it’s offerings.” Examples of Al Jazeera and CN. CNN has thoroughly integrated social media into its shows, frequently passing e-mailed comments to pundits. It also encourages people to help create stories by uploading pictures and video to its iReport website. To protect its brand, CNN distinguishes between pictures and footage that it has vetted as genuine and those it has not.” Economist April 29th 2010
- MAVISE study also noted 9 news channels conceived especially for mobile phone services. BBC World News, Al Jazeera, Sky News, France 24 and BFM TV have also been among those who were the first to launch an application that allows their accessibility on the iPhone.

Challenges and opportunities

- Content and the role of regional and local TV
- The continued importance of news, growth of news channels, success of news channels in engaging blogs and UGC, in developing APPs.
- Financing and advertising, offset by major players with pay-TV and VOD.
- Digitisation, the importance of cable and terrestrial as platforms for local and regional TV
- Channels on DTT
- Costs of dual transmission of analogue and digital signals
- Web TV as distribution platform?

Summary

- Regional and local channels account for almost half the television channels in the EU + 2
- The nature of regional and local television is far from homogenous in the EU member states, as regards statutes, size of audiences targeted, funding and finances.
- It is clear that the traditional top channels have been steadily losing audiences over the last decade. This has also affected public service channels. This has mainly been caused by the increase in multi-channel television and thematic programming. As multi-channel and digitisation reach a critical mass of the market, the markets and audiences may stabilise.
- The availability of audience data of regional and local channels is very limited.
- Measurement of audiences is far from standardised - in some countries the thematic channels are included
- In several, the regional public service channels have significant audiences: Germany, Spain, UK - a reflection of the devolved systems of governance? Or the size of markets?
- Top programming includes reality TV, game shows, soap operas and series, but in many countries also news, magazines and political programmes
- Regional programming still also has significant audience shares in many countries

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