

# 3. Television and audio-visual

# Figure 3.1

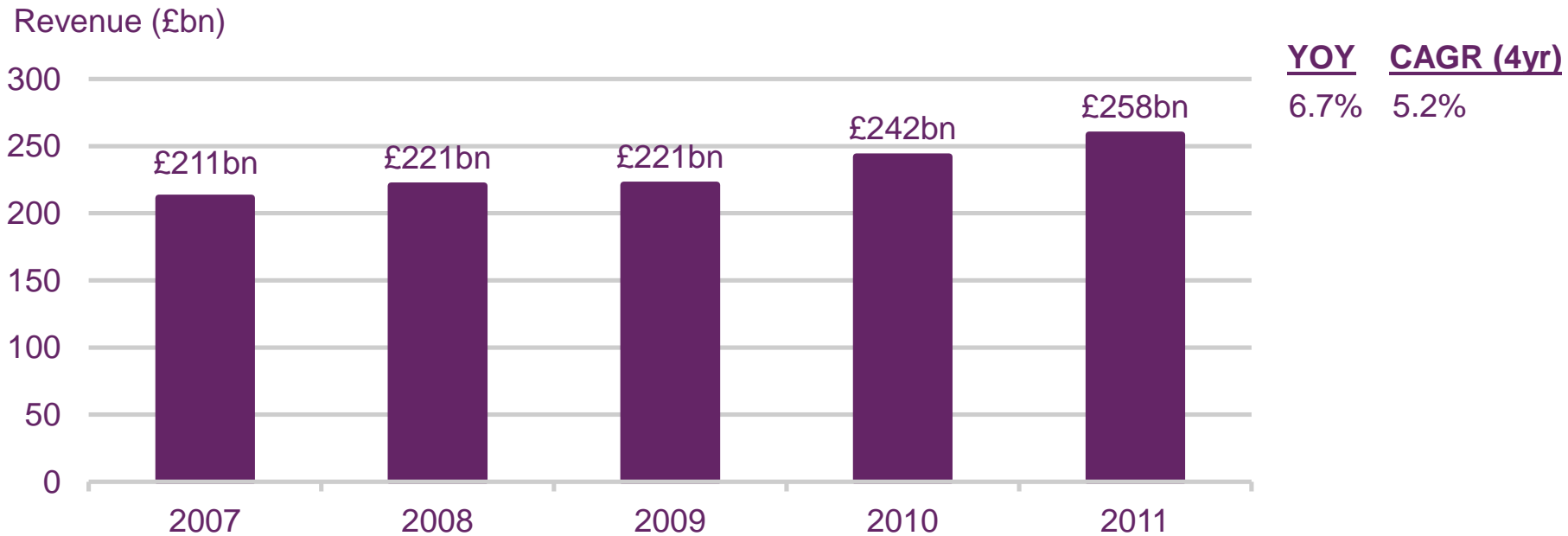
## TV industry metrics 2011

	UK	FRA	GER	ITA	USA	CAN	JPN	AUS	ESP	NED	SWE	IRL	POL	BRA	RUS	IND	CHN	
<b>TV revenue (£bn)</b>	11.3	10.2	11.6	7.8	100	4.4	31.1	5.3	4.8	2.6	1.8	0.9	2.4	12.4	3.6	5.5	12.4	
<b>Revs change (% YOY)</b>	2.7	2.6	3.1	-2.7	6.5	5.7	2.8	4.4	-4.9	5.4	5.1	1.6	10.4	12.7	16.6	14.2	14.4	
<b>Revenue per cap (£)</b>	180	155	142	127	320	128	244	244	102	155	198	182	62	63	26	5	9	
<i>from advertising</i>	56	46	43	63	115	66	111	115	36	49	61	37	20	36	20	1	6	
<i>from subscription</i>	80	76	48	40	204	44	91	95	27	66	96	111	41	25	6	3	4	
<i>From public funds</i>	44	33	51	24	1	18	42	34	39	40	41	34	1	1	0	0	0	
<b>TV licence fee<sup>1</sup></b>	146	107	187	97	n/a	n/a	200	n/a	n/a	n/a	199	139	42	n/a	n/a	n/a	n/a	
<b>Largest TV platform</b>	<i>Platform</i>	Dsat	DTT	Dsat	DTT	DCab	DCab	Dcab	DTT	DTT	Dcab	Acab	Dsat	DSat	DSat	ACab	Acab	Dcab
	<i>% of homes</i>	44%	30%	35%	43%	40%	53%	27%	49%	69%	47%	33%	53%	45%	45%	34%	58%	28%
<b>TV viewing (mins/day)<sup>2</sup></b>	242	227	225	253	293	240	n/a	189	239	191	162	205	242	225	220	119	163	
<b>No.1 channel share (%)</b>	21	24	14	19	7	9	n/a	15	15	19	23	23	17	40	17	9	7	
<b>DTV take-up (%)</b>	99	97	66	93	89	87	77	83	100	77	67	90	62	69	40	40	43	
<b>Pay TV take-up (%)</b>	55	62	64	35	89	93	63	34	27	99	92	76	78	23	64	94	57	
<b>DSO date</b>	2012	2011	2008	2012	2009	2011	2011	2013	2010	2006	2007	2012	2013	2016	2015	2014	2015	

Source: IDATE / industry data / Ofcom / Mediametrie, Eurodata TV Worldwide. Figures have been converted to GBP using IMF 2011 average exchange rates. <sup>1</sup>The Japanese licence fee costs £117 in terrestrial households or £200 to receive a larger number of channels via satellite. <sup>2</sup>Refers to average TV viewing per head, per day.

# Figure 3.2

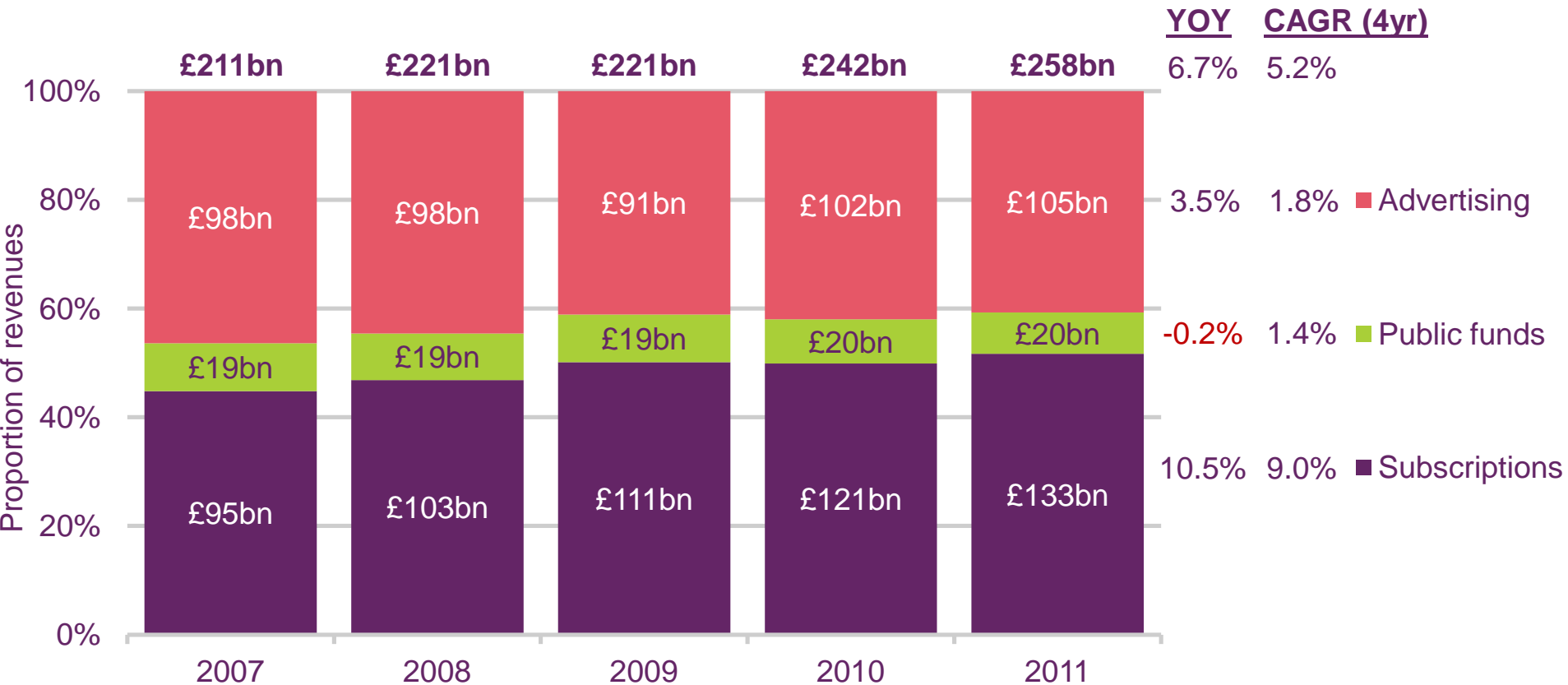
## Global TV revenues



Source: Ofcom analysis based on data taken from PricewaterhouseCoopers Global Entertainment and Media Outlook 2012-2016 @ [www.pwc.com/outlook](http://www.pwc.com/outlook). IDATE / industry data / Ofcom for US and UK revenues. Notes: Net TV advertising revenues for Russia have been calculated by discounting 15% of TV advertising spending to remove agency fees and production costs. Interpretation and manipulation of data are solely Ofcom's responsibility. Ofcom has used an exchange rate of \$1.604 to the GBP, representing the IMF average for 2011.

# Figure 3.3

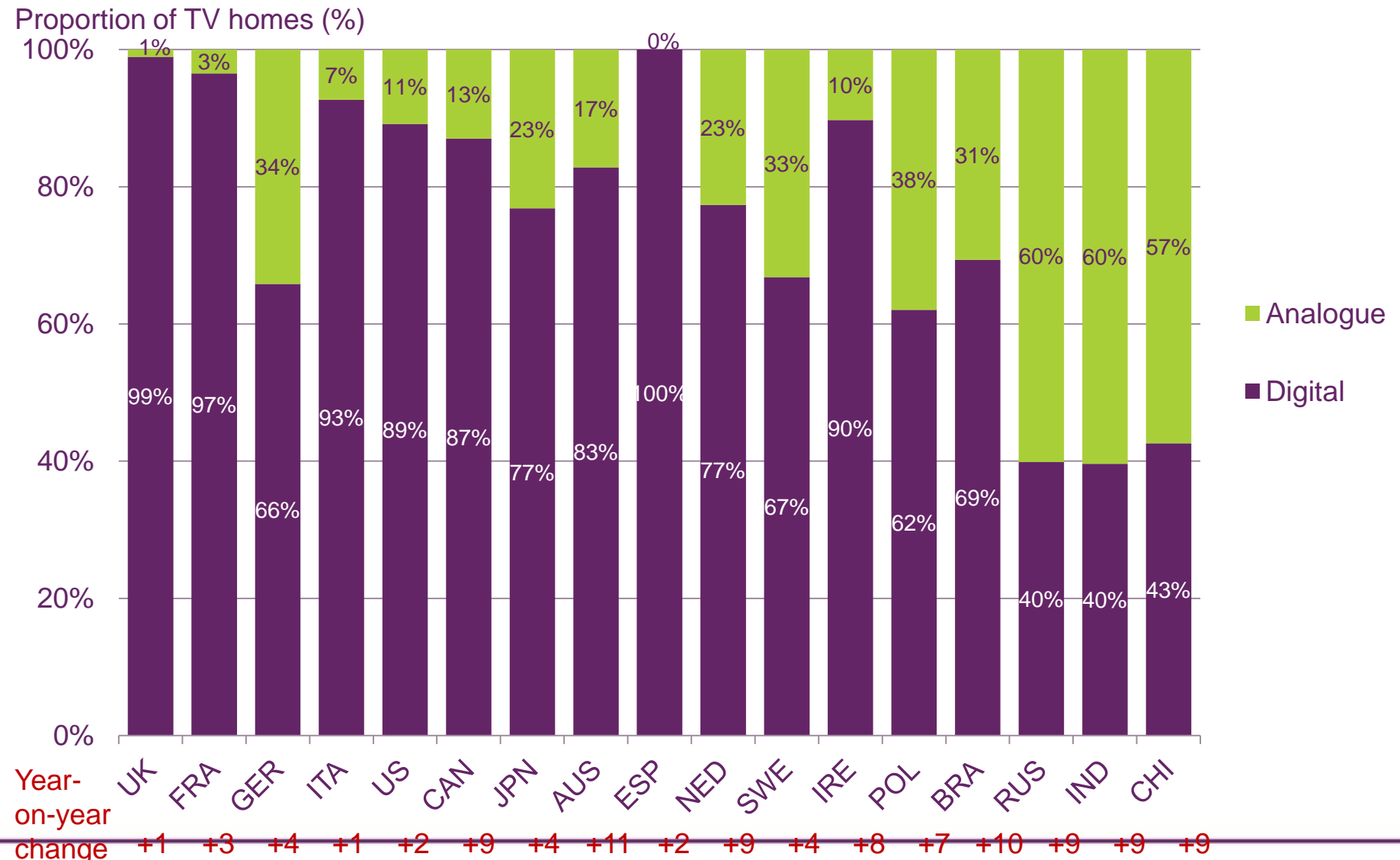
## TV industry revenues, by source



Source: Ofcom analysis based on data taken from PricewaterhouseCoopers Global Entertainment and Media Outlook 2012-2016 @ [www.pwc.com/outlook](http://www.pwc.com/outlook). IDATE / industry data / Ofcom for US and UK revenues. Notes: Net TV advertising revenues for Russia have been calculated by discounting 15% of TV advertising spending to remove agency fees and production costs. Interpretation and manipulation of data are solely Ofcom's responsibility. Ofcom has used an exchange rate of \$1.604 to the GBP, representing the IMF average for 2011.

# Figure 3.4

## Take-up of digital and analogue television, 2011

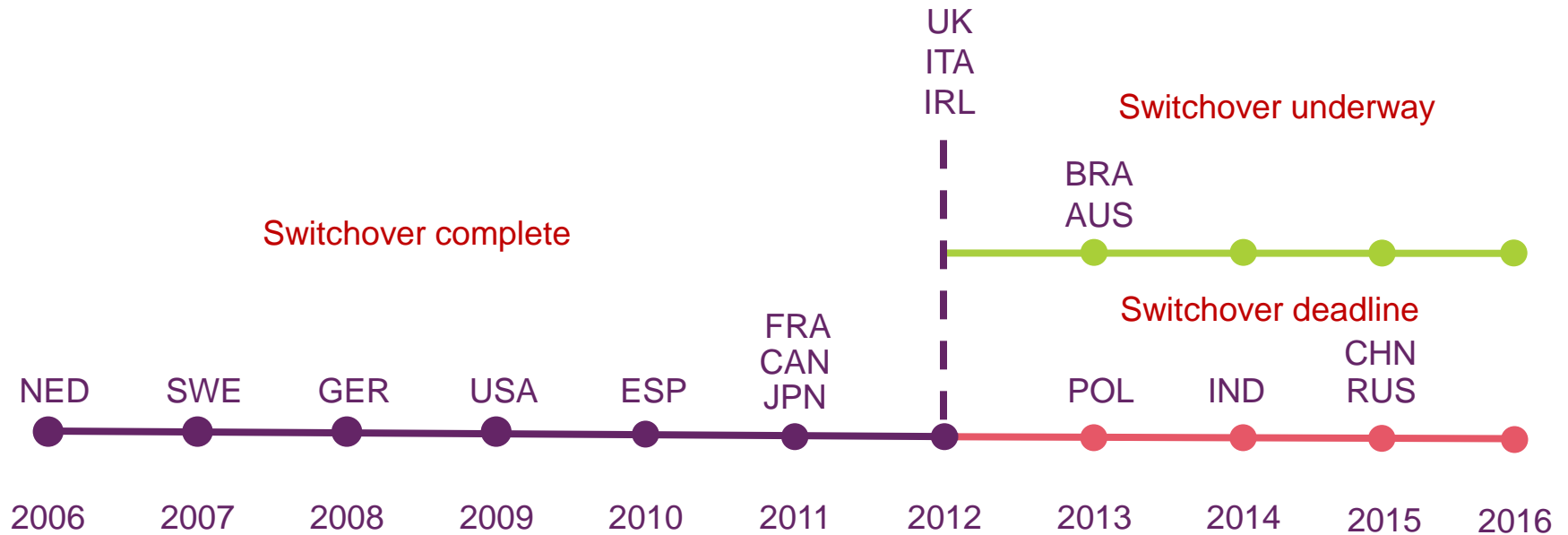


Year-on-year change (pp)

Source: IDATE / industry data / Ofcom

# Figure 3.5

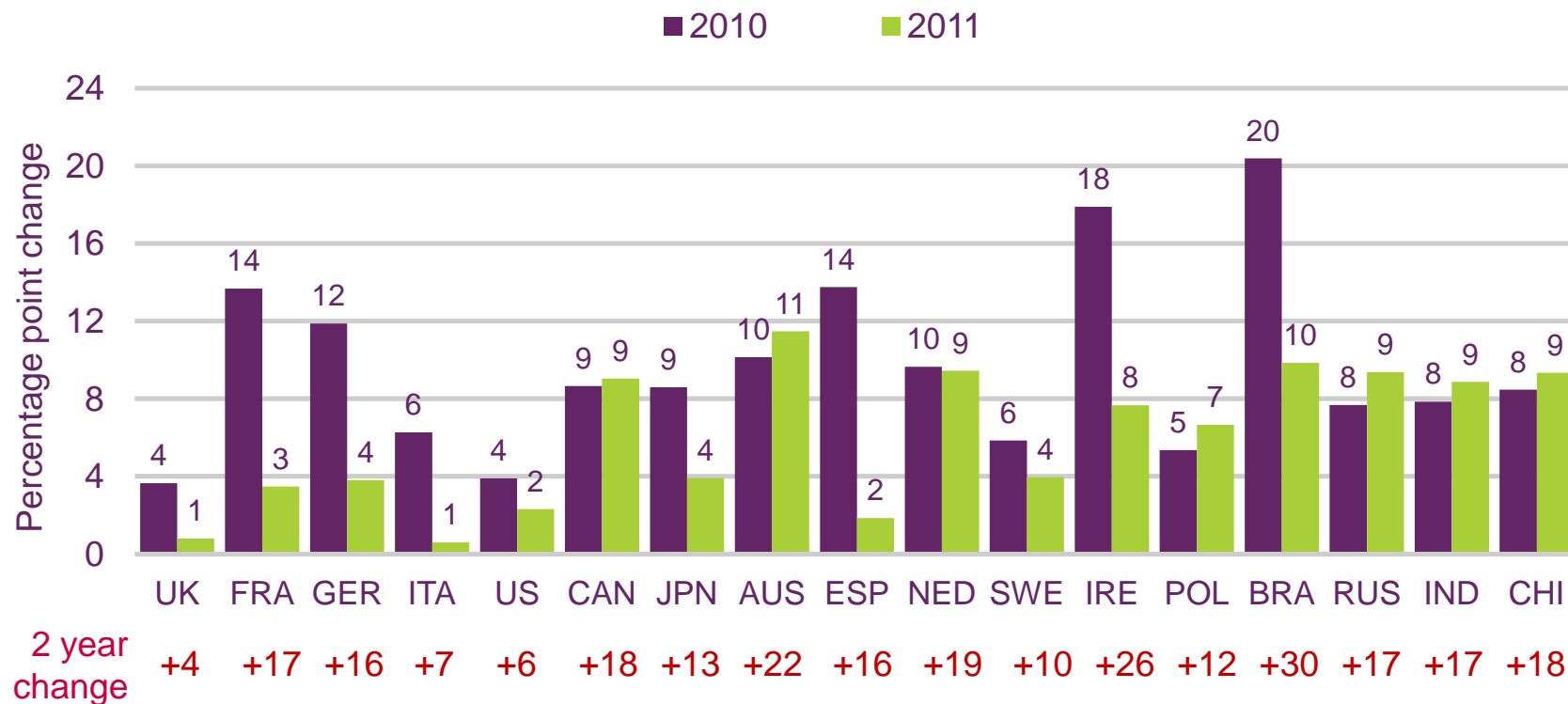
Timeline for digital switchover, by country and date



Source: IDATE / industry data / Ofcom

# Figure 3.6

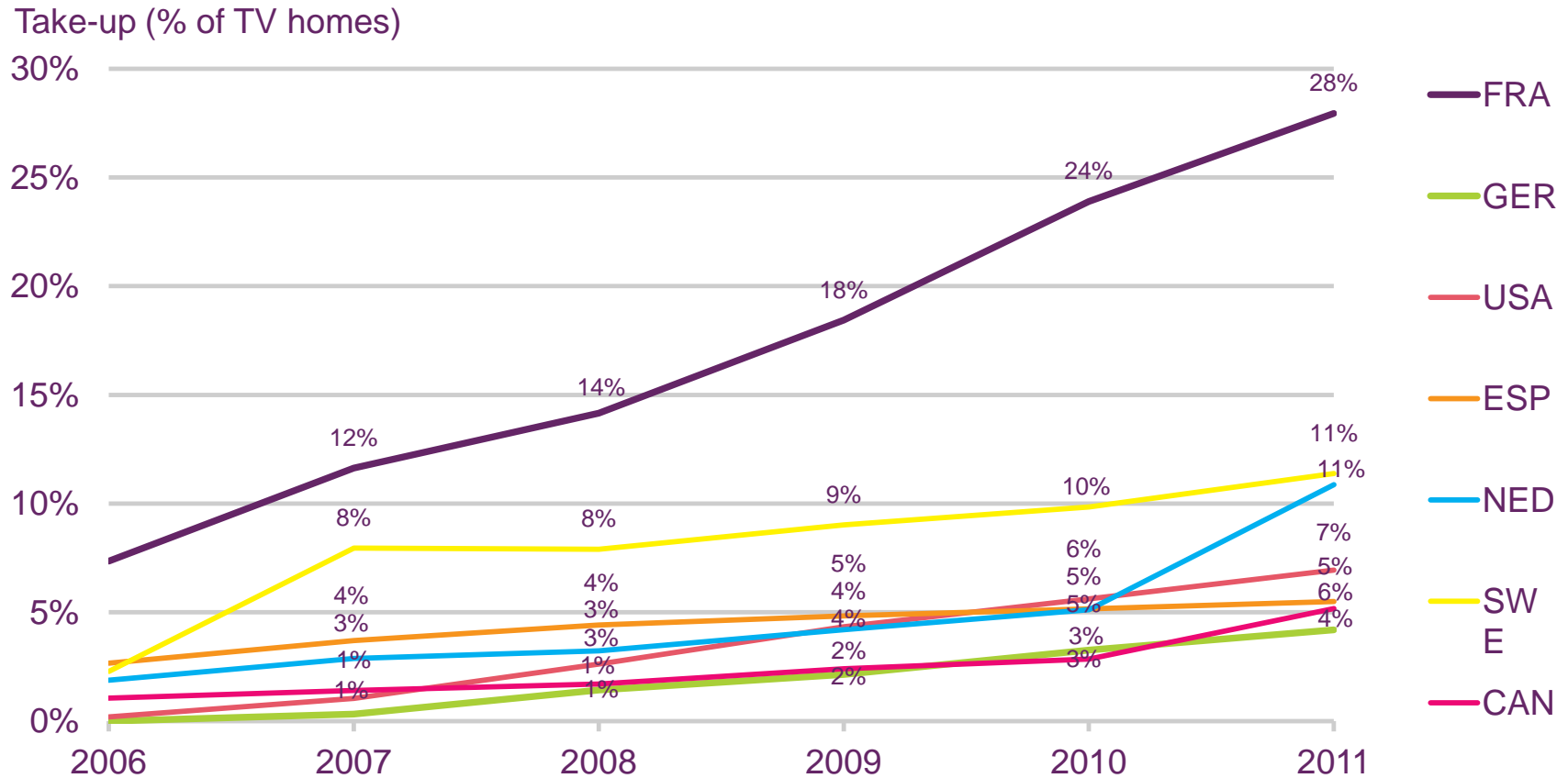
## Percentage point change in the take-up of DTV, 2010 and 2011



Source: IDATE / industry data / Ofcom

# Figure 3.7

## IPTV take-up on main TV sets in countries where take-up exceeded 4% in 2011

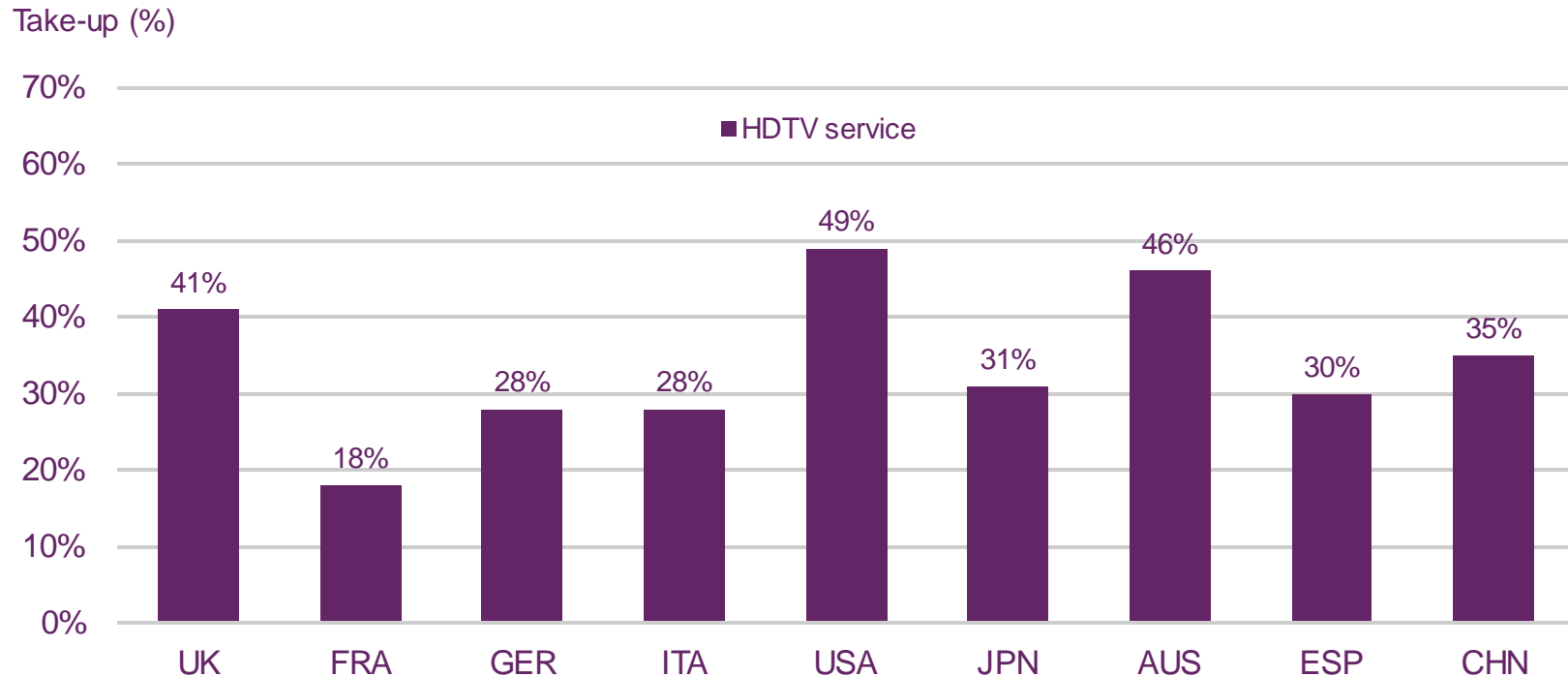


Source: IDATE / industry data / Ofcom. Notes: Only countries where IPTV take-up exceeded 4% of television homes in 2011 are shown in the chart.



# Figure 3.8

## Take-up of high definition TV service



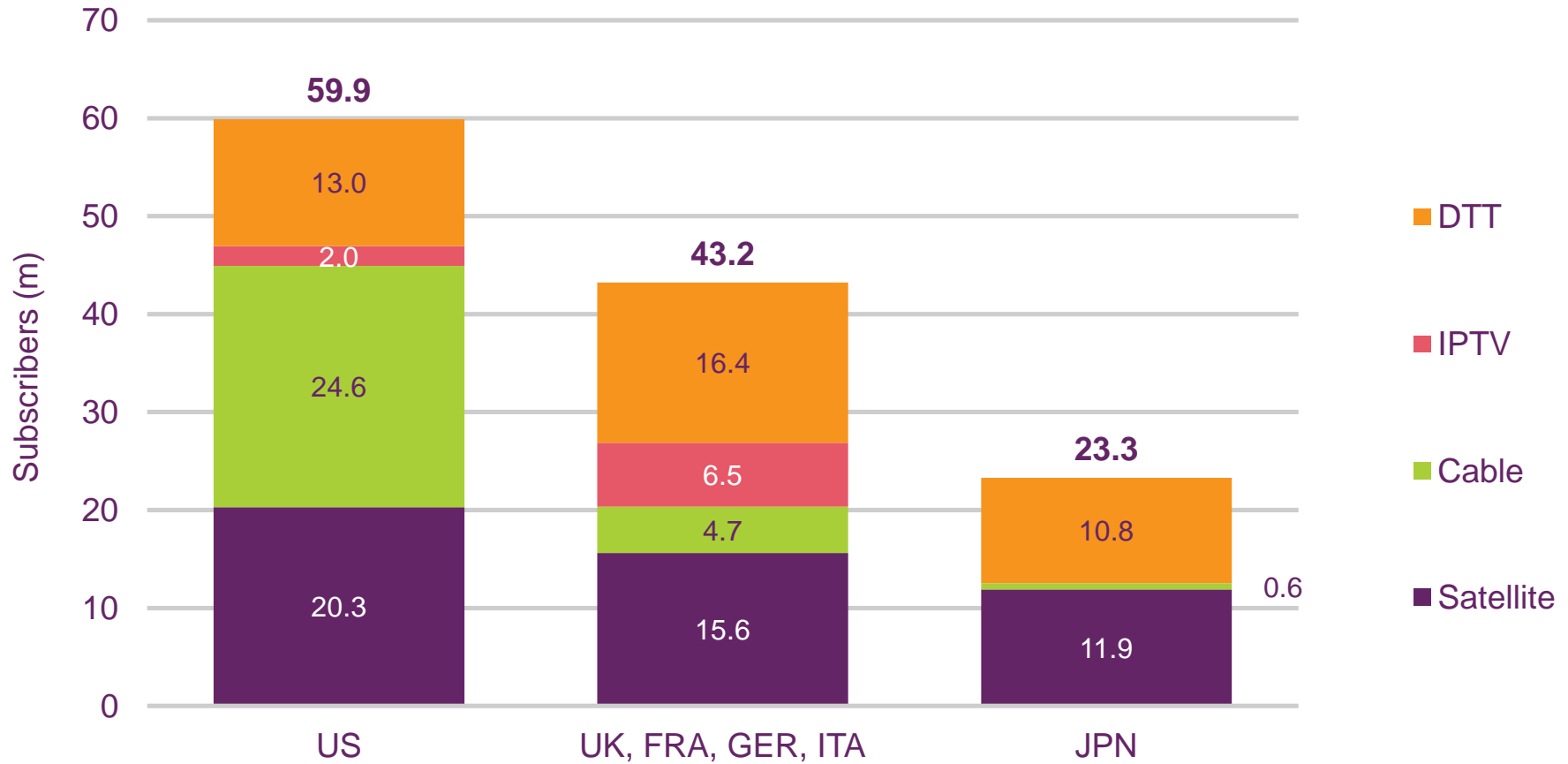
Source: Ofcom Consumer Research October 2012

Base: Total sample size UK=1065, France=1016, Germany=1024, Italy=1015, US=1010, Japan=1004, Australia=1007, Spain=1001, China=1010

Q: Which of the following devices do you own and personally use?

# Figure 3.9

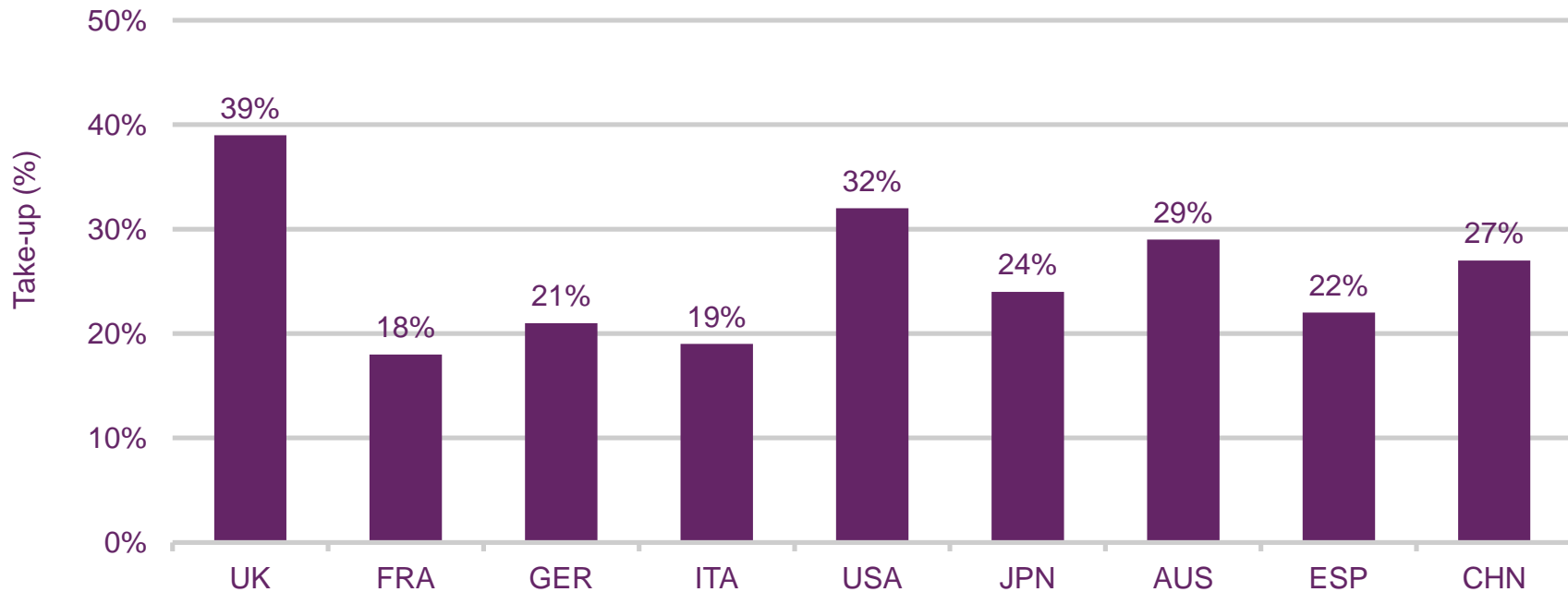
## Number of HD homes, by platform and country, end 2011



Source: IDATE / industry data / Ofcom. Notes: Paying and FTA HD homes; no data available for IPTV take-up in Japan.

# Figure 3.10

## Claimed DVR take-up and year-on-year changes in take-up

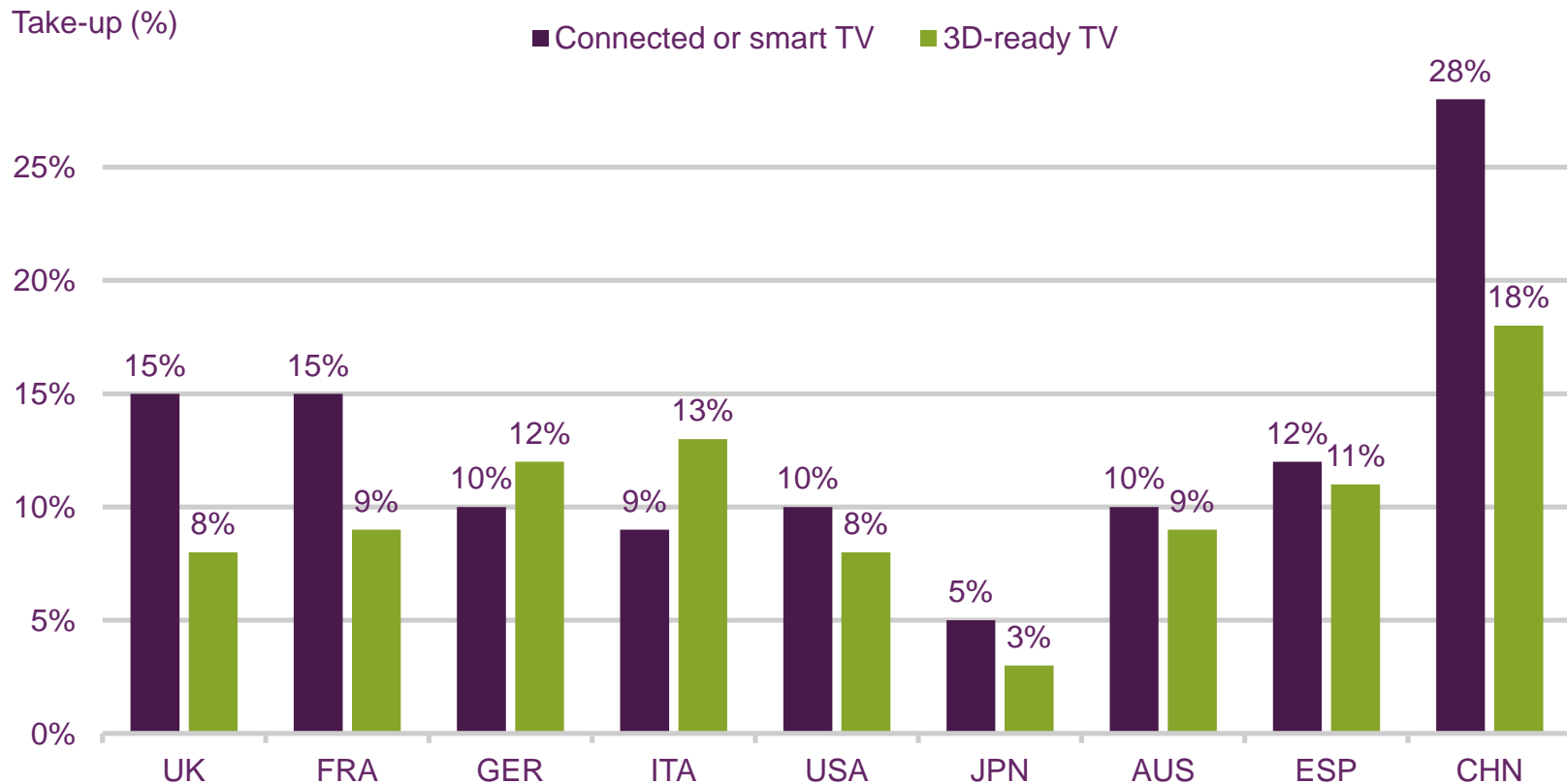


Source: Ofcom Consumer Research October 2012

Base: Total sample size: UK=1065, France=1016, Germany=1024, Italy=1015, US=1010, Japan=1004, Australia=1007, Spain=1001, China=1010, Spain=1001, China=1010. Q: Which of the following devices do you own and personally use?

# Figure 3.11

## Claimed take-up of connected televisions and 3D-ready TVs

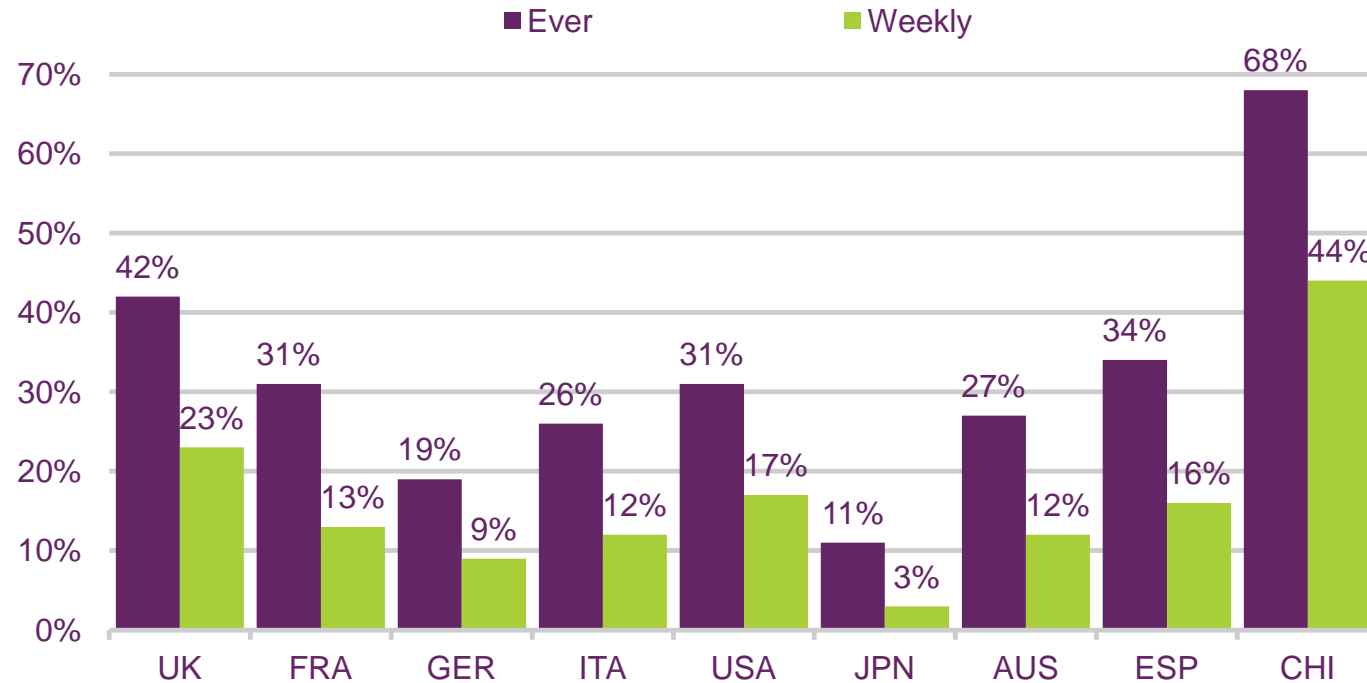


Source: Ofcom Consumer Research October 2012. Base: Total sample size UK=1065, France=1016, Germany=1024, Italy=1015, US=1010, Japan=1004, Australia=1007, Spain=1001, China=1010. Q: Which of the following devices do you own and personally use?

# Figure 3.12

## Accessing TV content over the internet

Proportion of respondents that access online TV (%)



Source: Ofcom Consumer Research October 2012

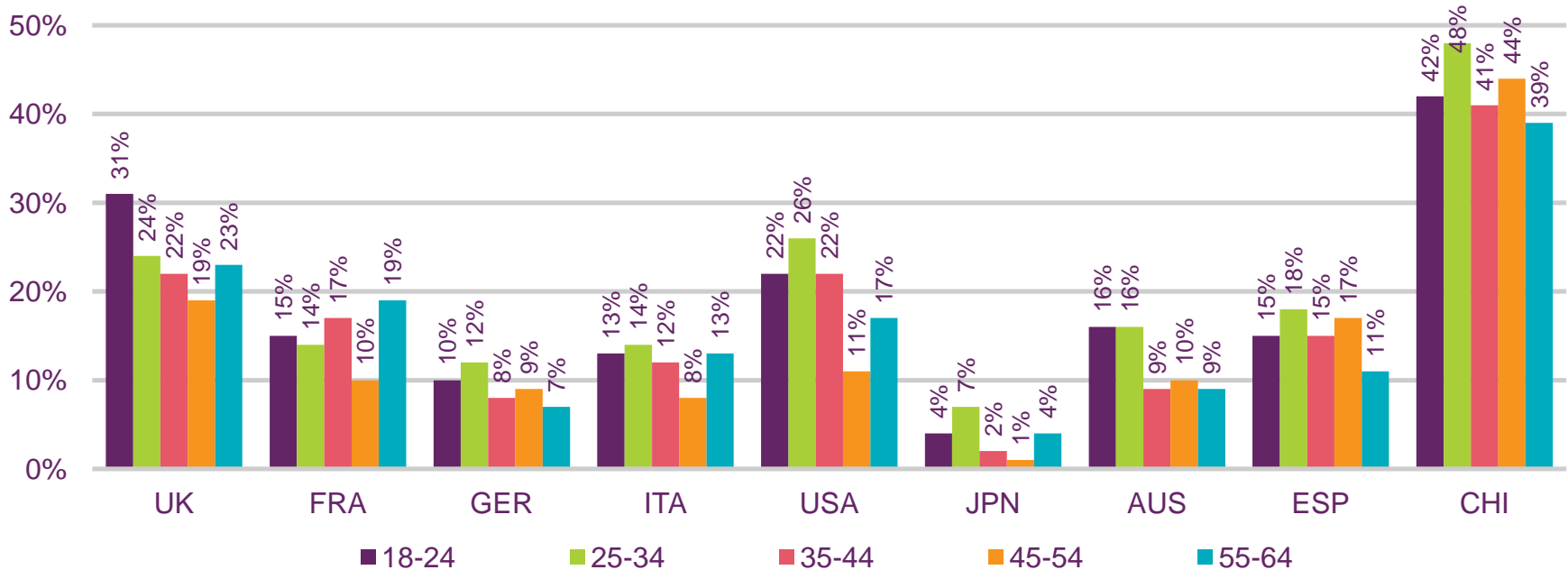
Base: Total sample size UK=1065, France=1016, Germany=1024, Italy=1015, US=1010, Japan=1004, Australia=1007, Spain=1001, China=1010

Q. Which of the following activities do you use your home internet connection for?

# Figure 3.13

## Accessing TV content over the internet, by age

Proportion of respondents accessing online TV weekly(%)



Source: Ofcom Consumer Research October 2012.

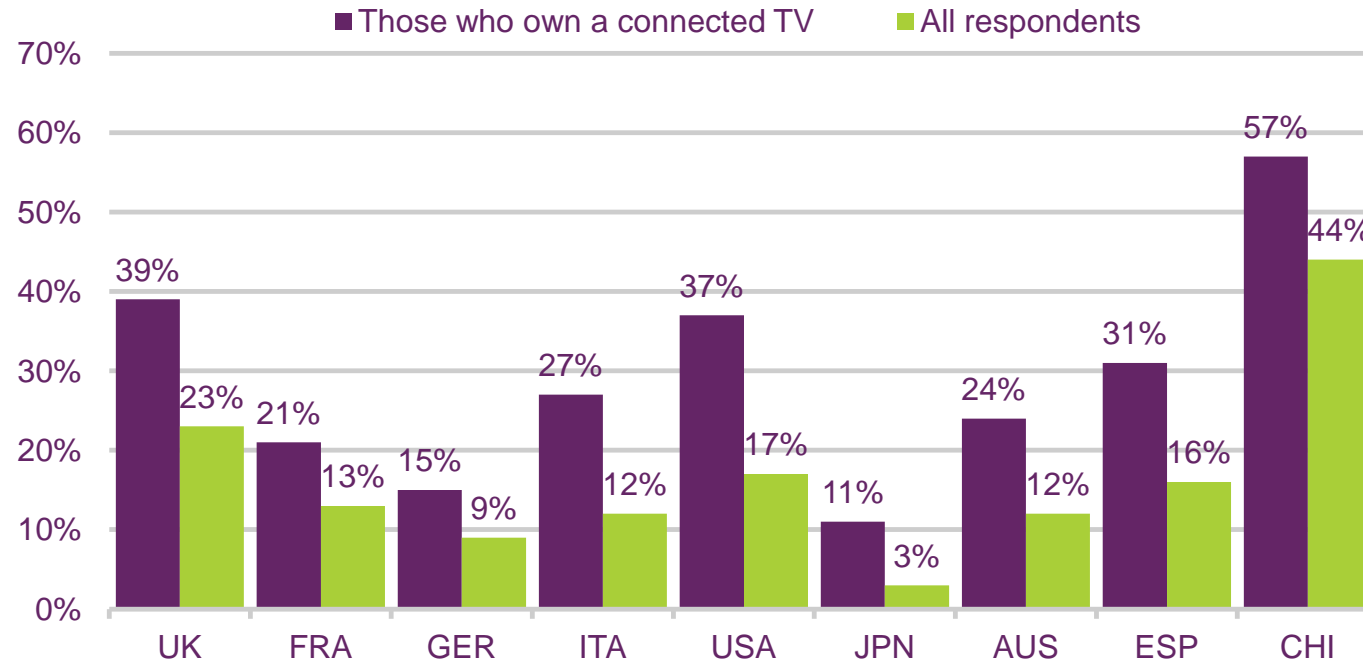
Base: UK=1065, France=1016, Germany=1024, Italy=1015, US=1010, Japan=1004, Australia=1007, Spain=1001, China=1010

Q: Which, if any, of the following activities do you use your home internet connection for?

# Figure 3.14

## Accessing TV content over the internet, by connected TV ownership

Proportion of respondents that access online TV (%)



Source: Ofcom Consumer Research October 2012

Base: Total sample size UK=1065, France=1016, Germany=1024, Italy=1015, US=1010, Japan=1004, Australia=1007, Spain=1001, China=1010

Q. Which of the following activities do you use your home internet connection for?

# Figure 3.15

## TV industry revenues among comparator countries

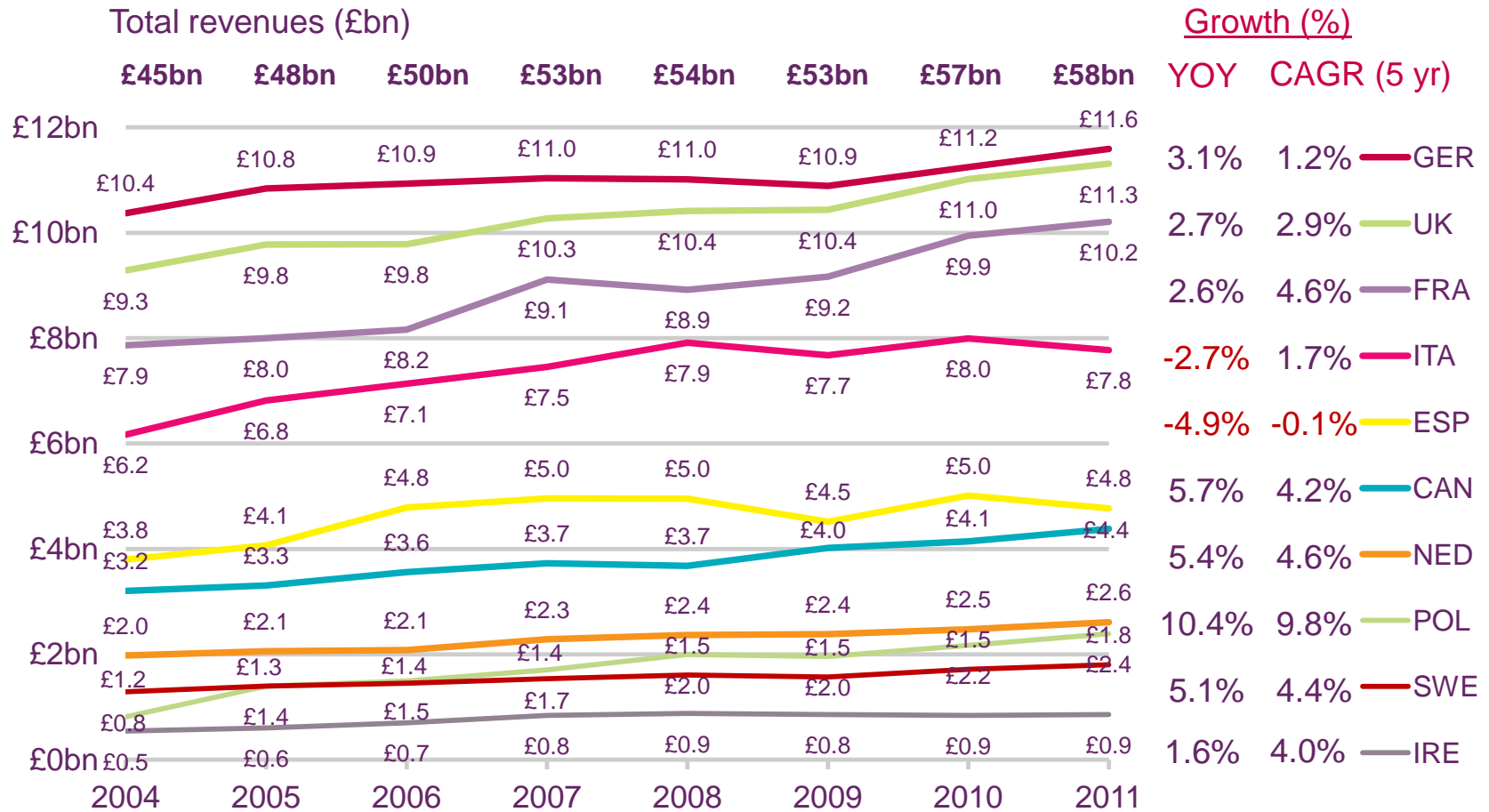


Source: IDATE / industry data / Ofcom. Notes: Ofcom has used an exchange rate of \$1.604 to the GBP, representing the IMF average for 2011. Revenues include advertising, subscriptions and sources of public funding only. Europe includes the European countries in this analysis – UK, France, Germany, Italy, Spain, Netherlands, Sweden, Republic of Ireland and Poland. BRIC is Brazil, Russia, India and China.



# Figure 3.16

## TV industry revenues among European countries and Canada



Source: IDATE / industry data / Ofcom. Notes: Ofcom has used an exchange rate of \$1.604 to the GBP, representing the IMF average for 2011. Revenues include advertising, subscriptions and sources of public funding only. Europe includes the European countries in this analysis – UK, France, Germany, Italy, Spain, Netherlands, Sweden, Republic of Ireland and Poland.

# Figure 3.17

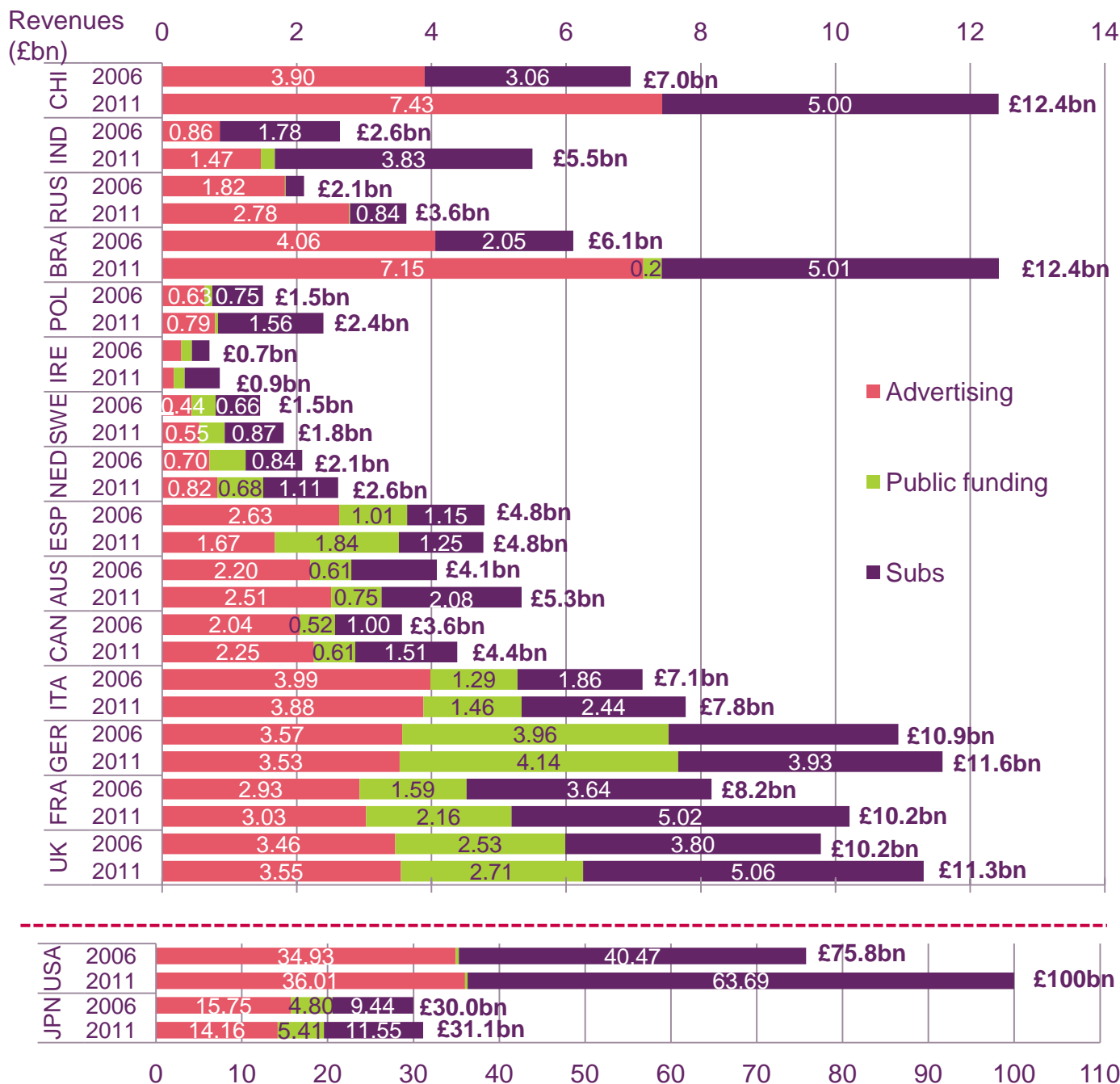
## Total TV industry revenues among BRIC countries



Source: IDATE / industry data / Ofcom. Notes: Ofcom has used an exchange rate of \$1.604 to the GBP, representing the IMF average for 2011. Revenues include advertising, subscriptions and sources of public funding only. BRIC is Brazil, Russia, India and China.

# Figure 3.18

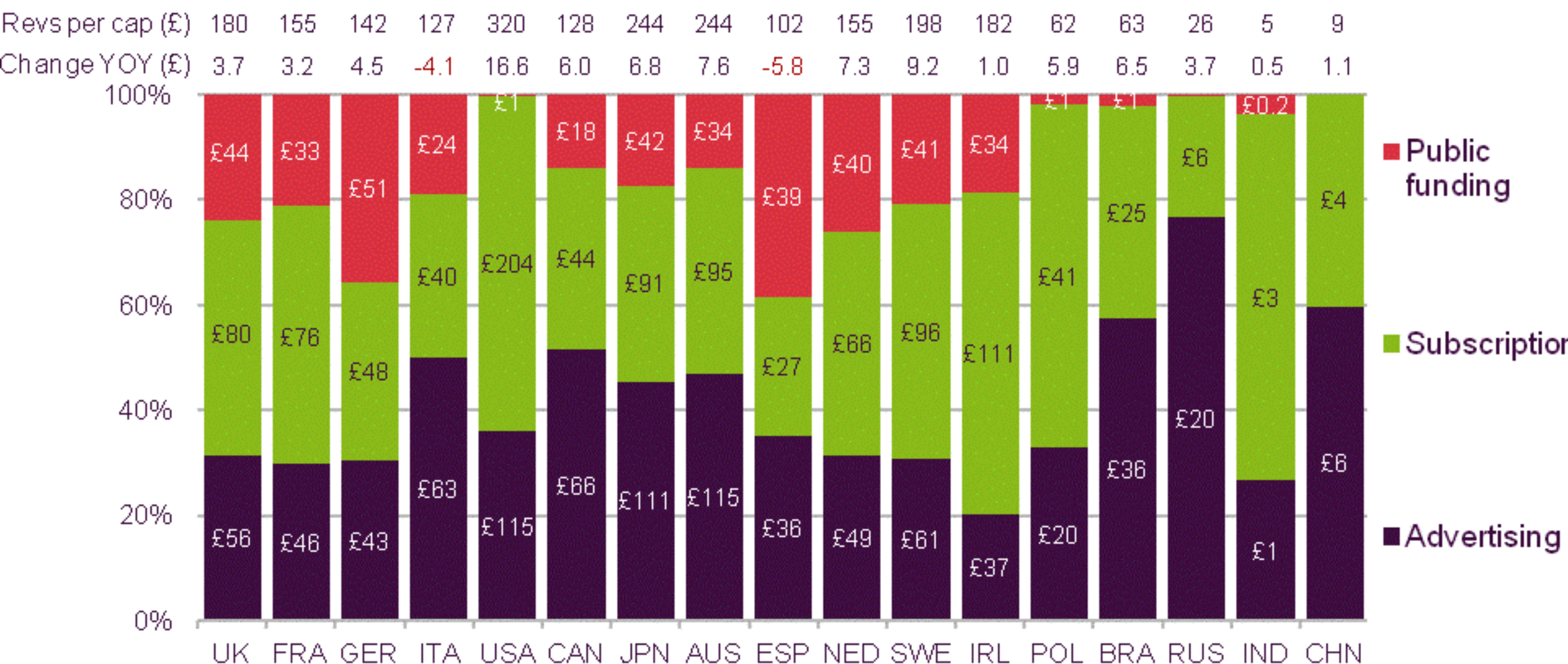
## TV revenues among comparator countries by source, 2006 and 2011



Source: IDATE / industry data / Ofcom. Notes: Ofcom has used an exchange rate of \$1.604 to the GBP, representing the IMF average for 2011. Revenues include advertising, subscriptions and sources of public funding only. Different scale used for USA and Japan due to larger size.

# Figure 3.19

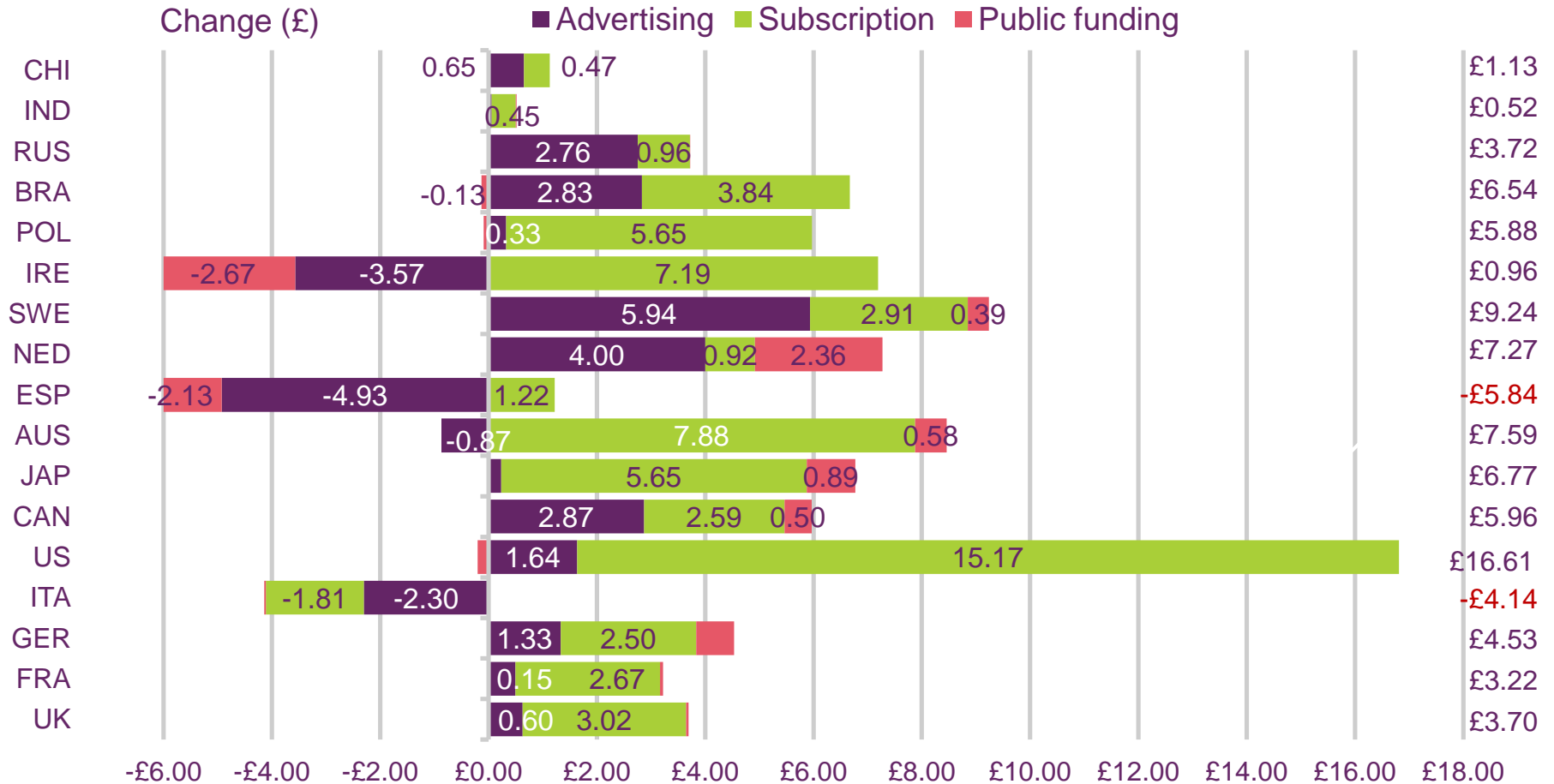
## TV revenue per head, by source, 2011



Source: IDATE / industry data / Ofcom. Notes: Ofcom has used an exchange rate of \$1.604 to the GBP, representing the IMF average for 2011. Revenues include advertising, subscriptions and sources of public funding only; figures inside the bars represent industry revenue per head by source.

# Figure 3.20

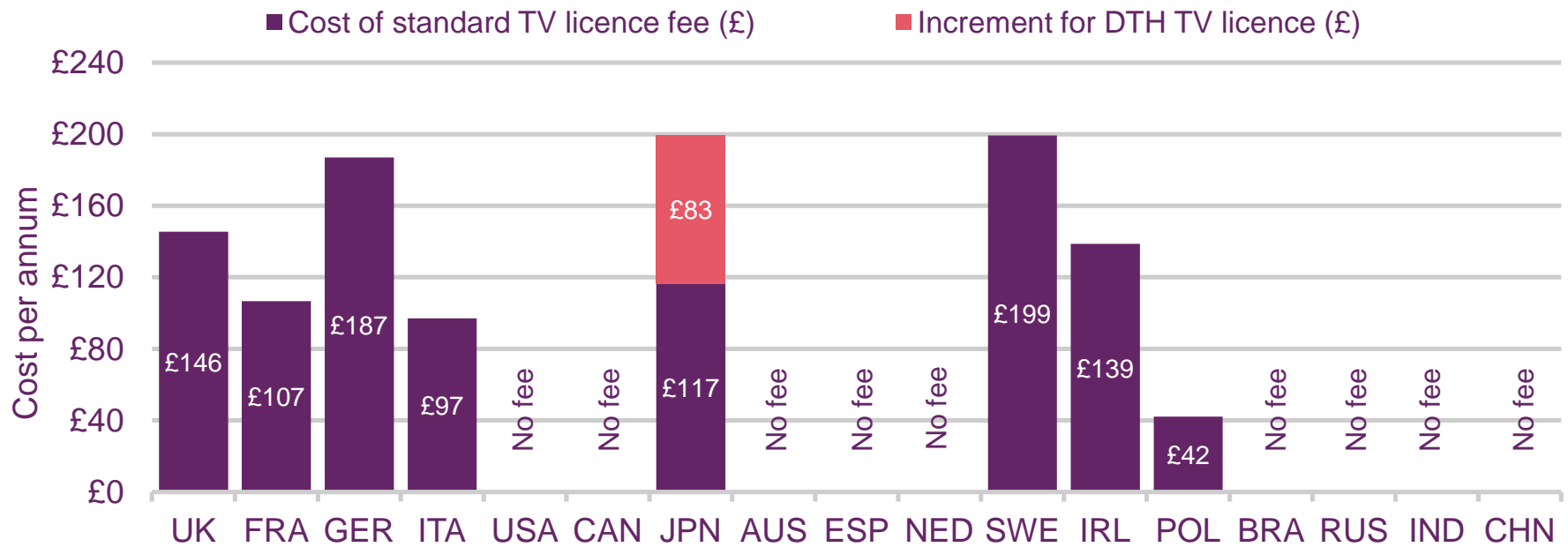
## Changes in components of TV revenues per head: 2010 to 2011



Source: IDATE / industry data / Ofcom. Notes: Ofcom has used an exchange rate of \$1.604 to the GBP, representing the IMF average for 2011. Revenues include advertising, subscriptions and sources of public funding only; the bars represent changes in industry revenue per head, by source.

# Figure 3.21

## Cost of a TV licence fee

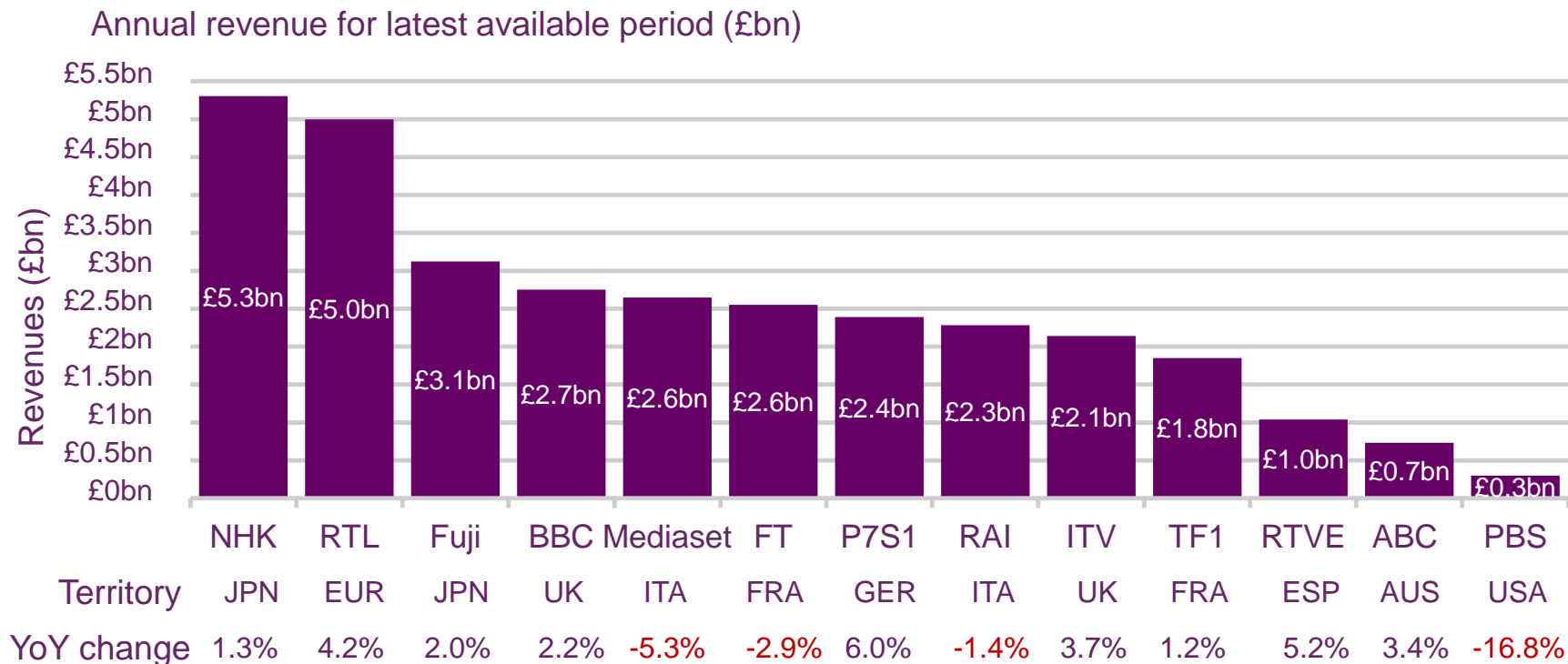


Source: IDATE / industry data / Ofcom. Notes: Ofcom has used an exchange rate of \$1.604 to the GBP, representing the IMF average for 2011; Prices as of end 2011. Note: The Japanese licence fee costs £117 in terrestrial households or £200 (rounded) to receive a larger number of channels via satellite



# Figure 3.22

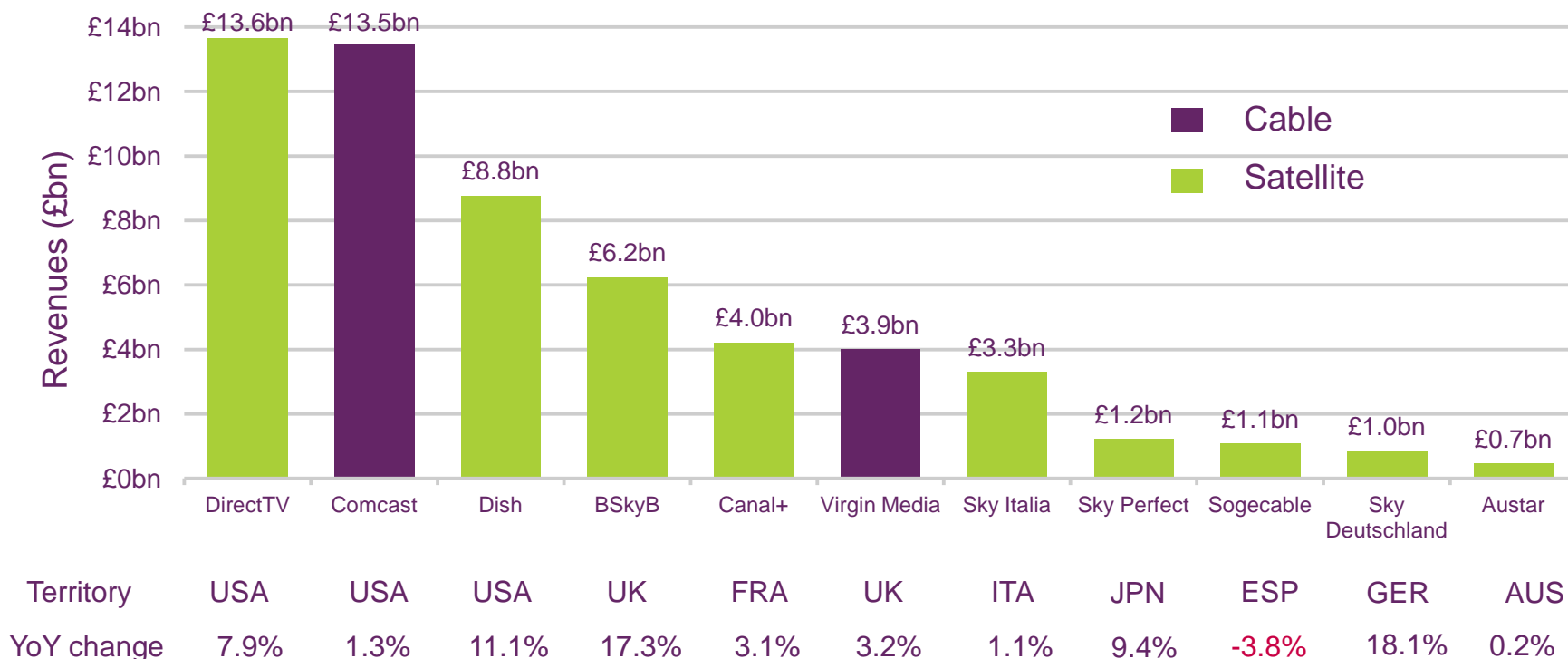
## Latest reported revenues from selected free-to-view TV operators, 2011



Source: IDATE / industry data / Ofcom. Notes: Ofcom has used an exchange rate of \$1.604 to the GBP, representing the IMF average for 2011; Comparisons should be regarded as indicative only due to the possibility of differences in financial reporting between broadcasters. RTL figure includes its key European markets; Mediaset includes Italian FTA and pay TV business (year ending Dec 31) BBC represents its income allocated to TV; RAI figures include licence fee (split between radio and TV unknown), TV advertising and sponsorship; ProSieben, group revenues (years ended Dec 31); France Televisions is licence fee and advertising; TF1 includes French channels (years ended Dec 31); PBS and the ABC are total revenue to year ending June 30; Fuji TV is broadcasting and production, year ending March 31; RTVE is advertising and public funding (as of year ending Dec 31).

# Figure 3.23

## Latest reported revenues from selected pay-TV operators, 2011

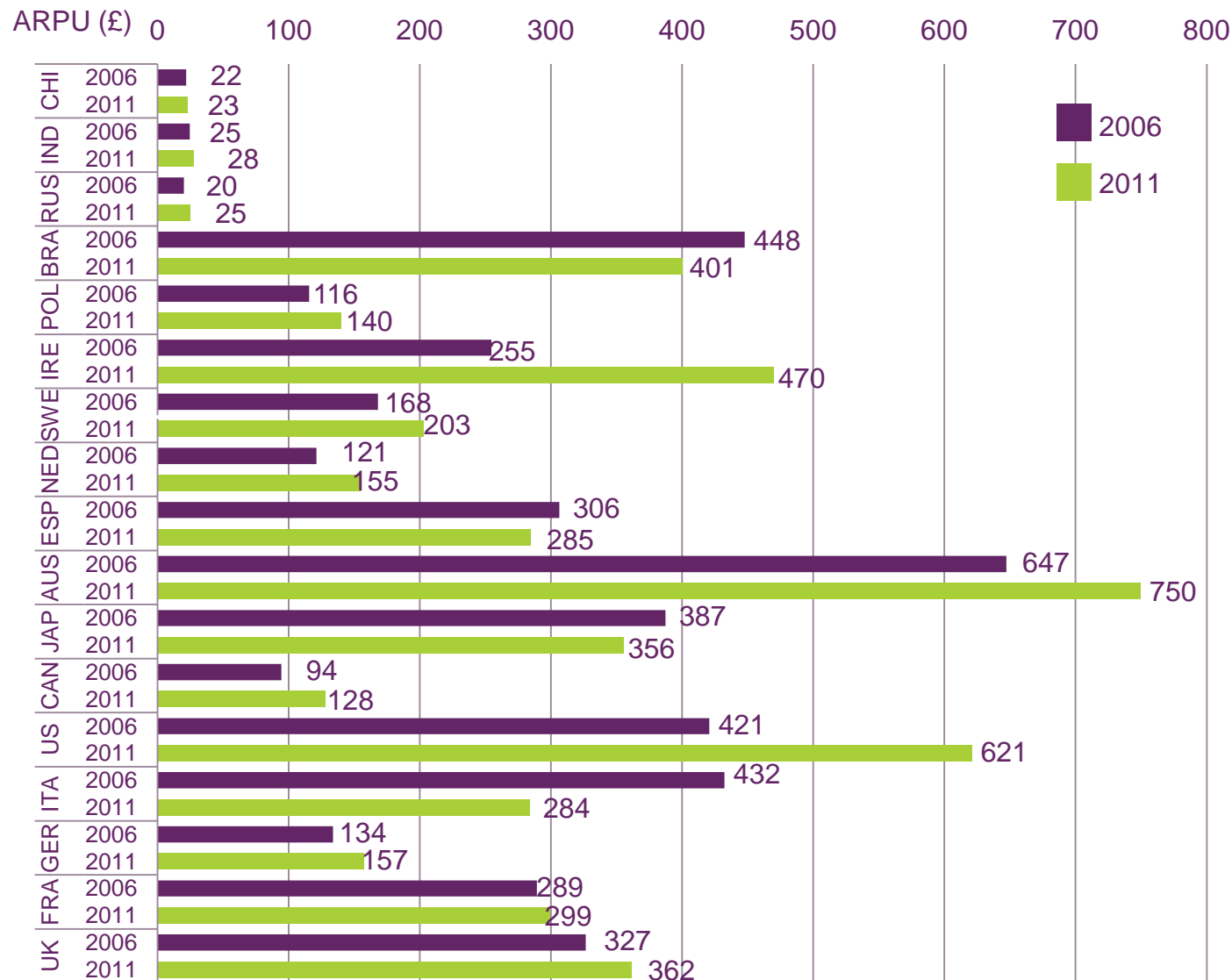


Source: IDATE / industry data / Ofcom. Notes: Ofcom has used an exchange rate of \$1.604 to the GBP, representing the IMF average for 2011; where possible we have reported revenues related to the TV services only (including advertising). Comcast includes video and advertising revenues; Time Warner Cable includes video and advertising revenues; BSKyB include retail, wholesale and advertising revenues; KDG includes cable access and TV/radio revenues; Virgin Media includes consumer and content revenues; Sky Italia revenue based on IDATE's estimate from News Corporation's annual report; Canal+ represents Canal Plus Group pay-TV revenues; Sogecable's platform is Digital Plus.



# Figure 3.24

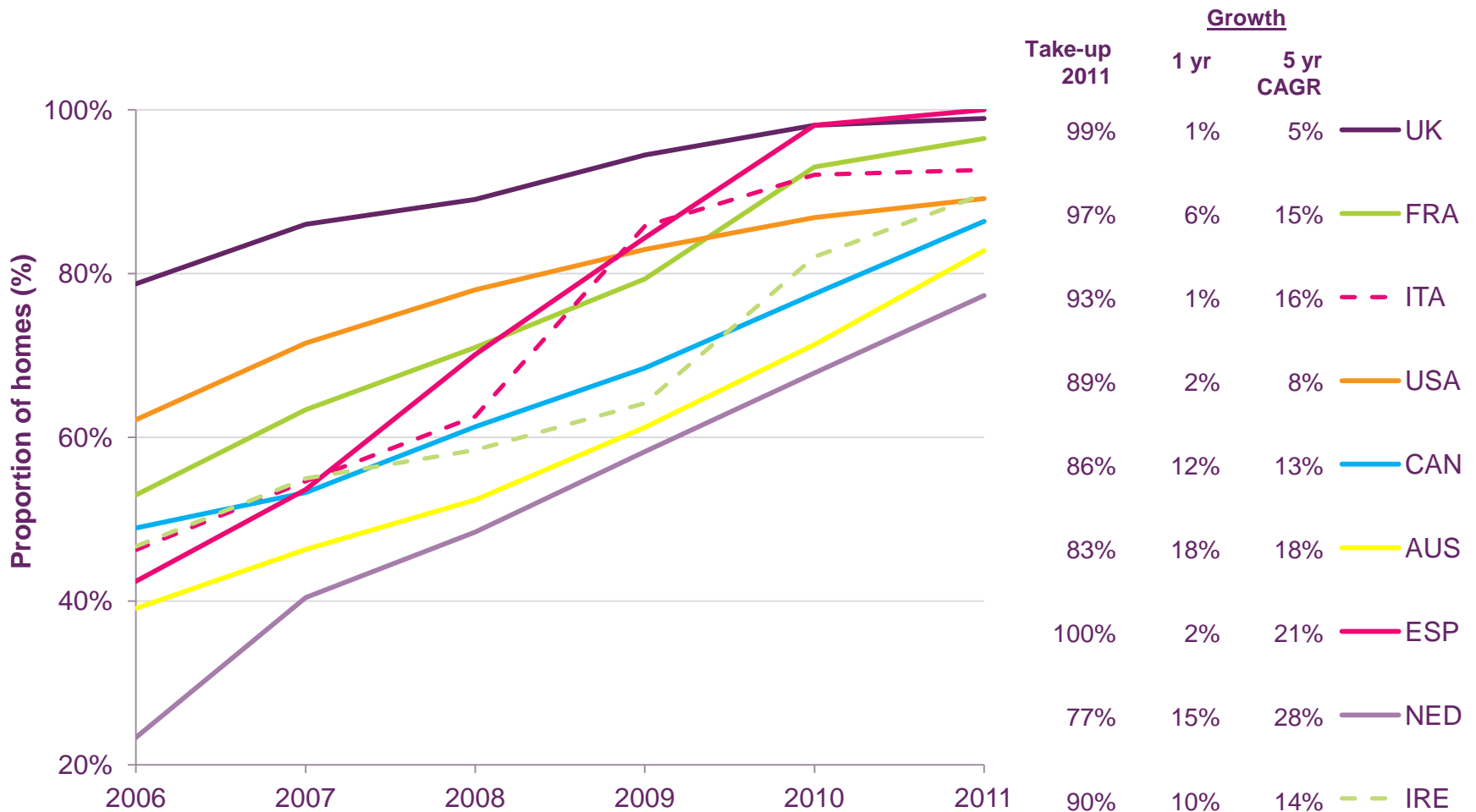
## Pay-TV ARPU, by country: 2006-2011



Source: IDATE / industry data / Ofcom. Notes: Ofcom has used an exchange rate of \$1.604 to the GBP, representing the IMF average for 2011. ARPU is average revenue per user, representing the average revenue generated per pay TV subscriber.

# Figure 3.25

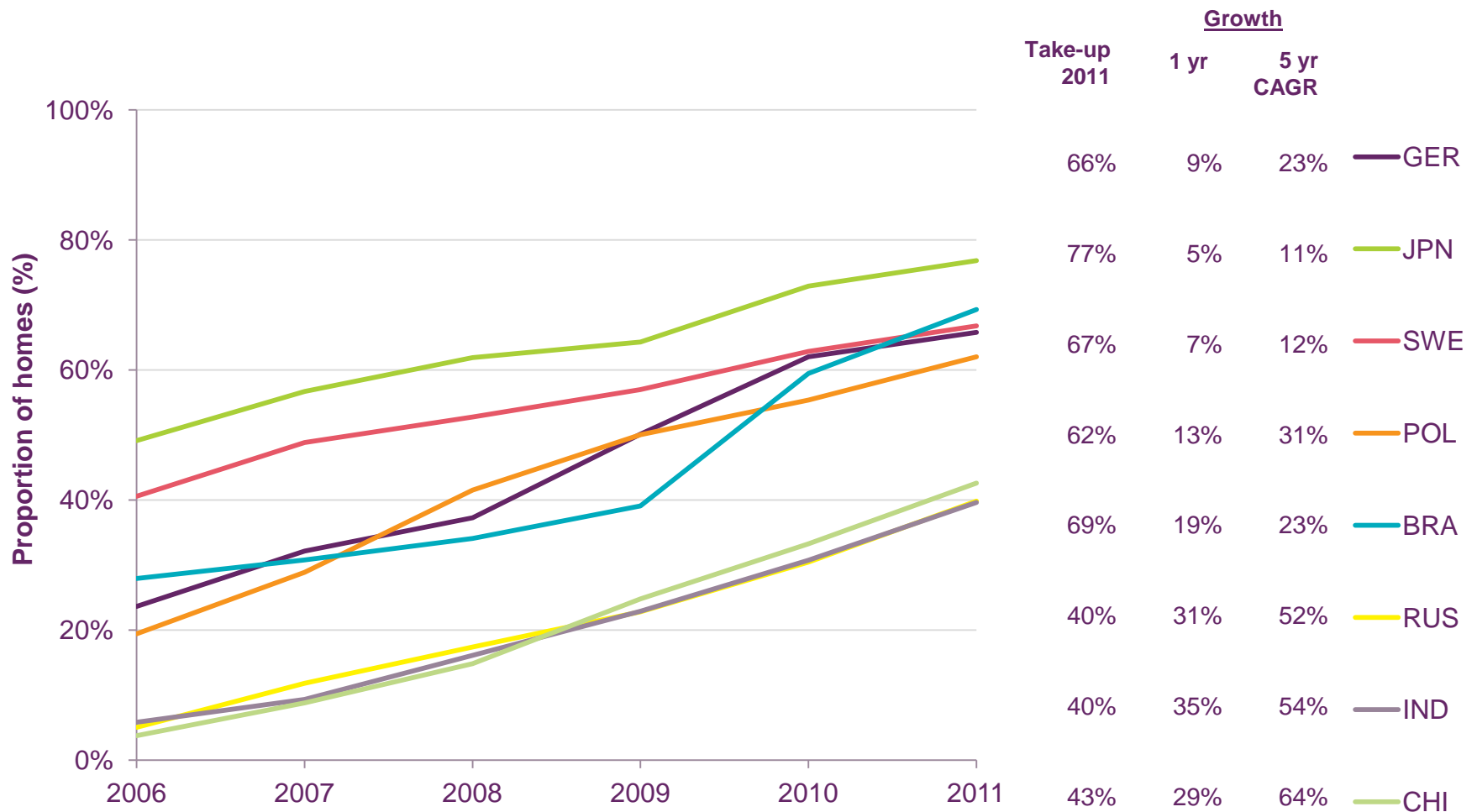
## Take-up of digital television – top nine comparator countries



Source: IDATE / industry data / Ofcom

# Figure 3.26

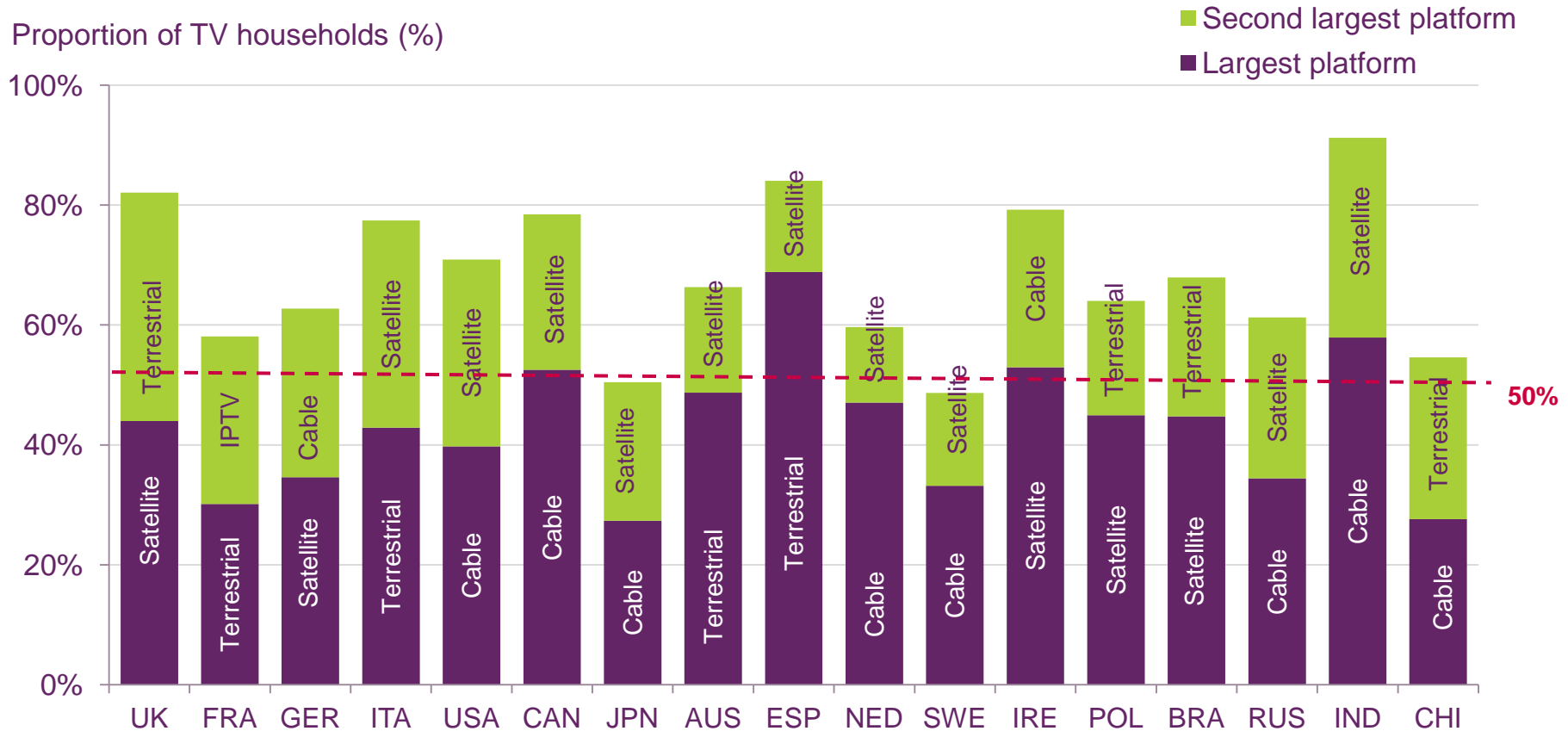
## Take-up of digital television – the next eight comparator countries



Source: IDATE / industry data / Ofcom

# Figure 3.27

## The two most popular DTV platforms, by country, 2011

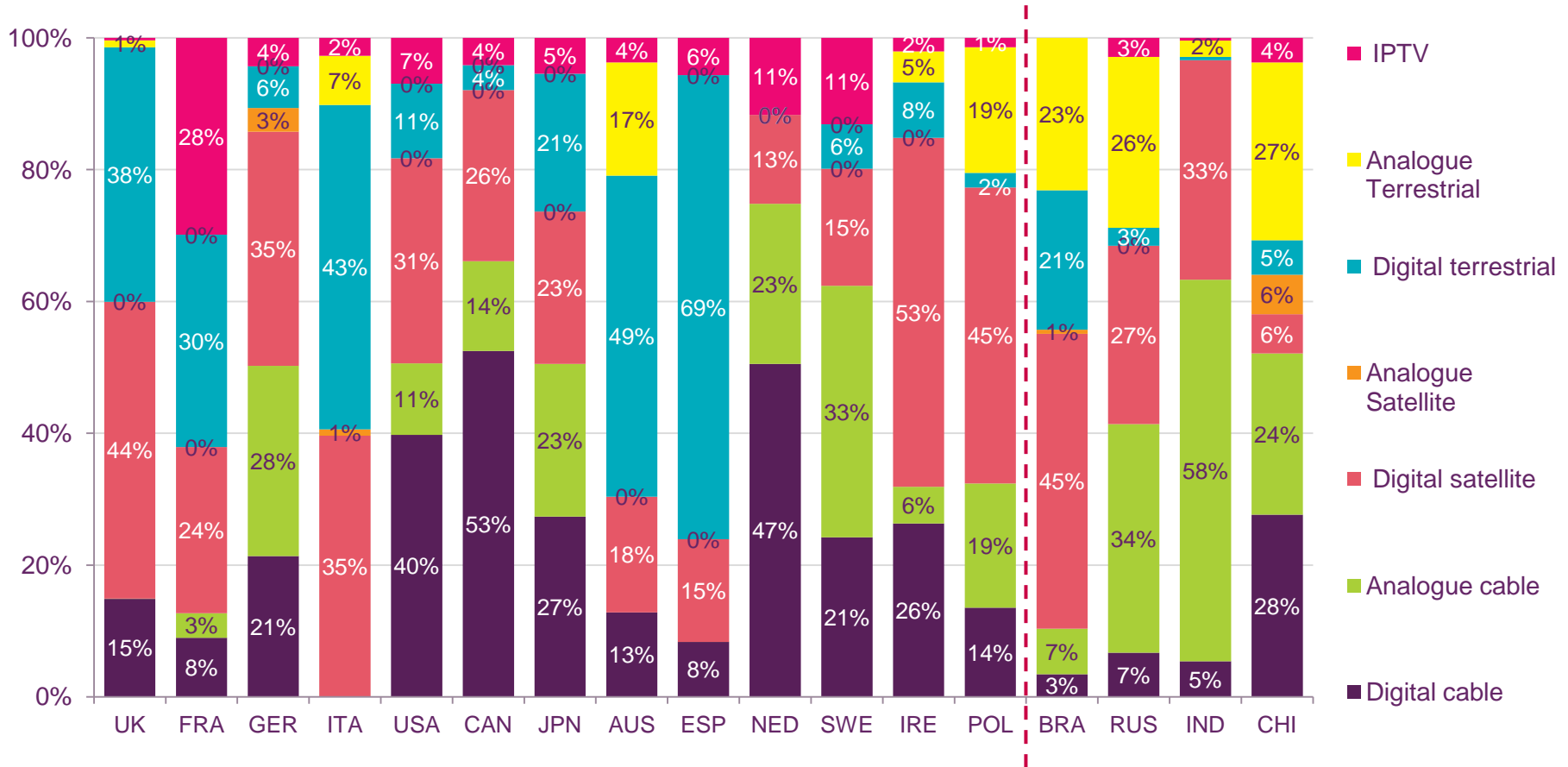


Source: IDATE / industry data / Ofcom

# Figure 3.28

## Take-up of DTV, by platform and country: 2011

Proportion of TV homes (%)



Source: IDATE / industry data / Ofcom

# Figure 3.29

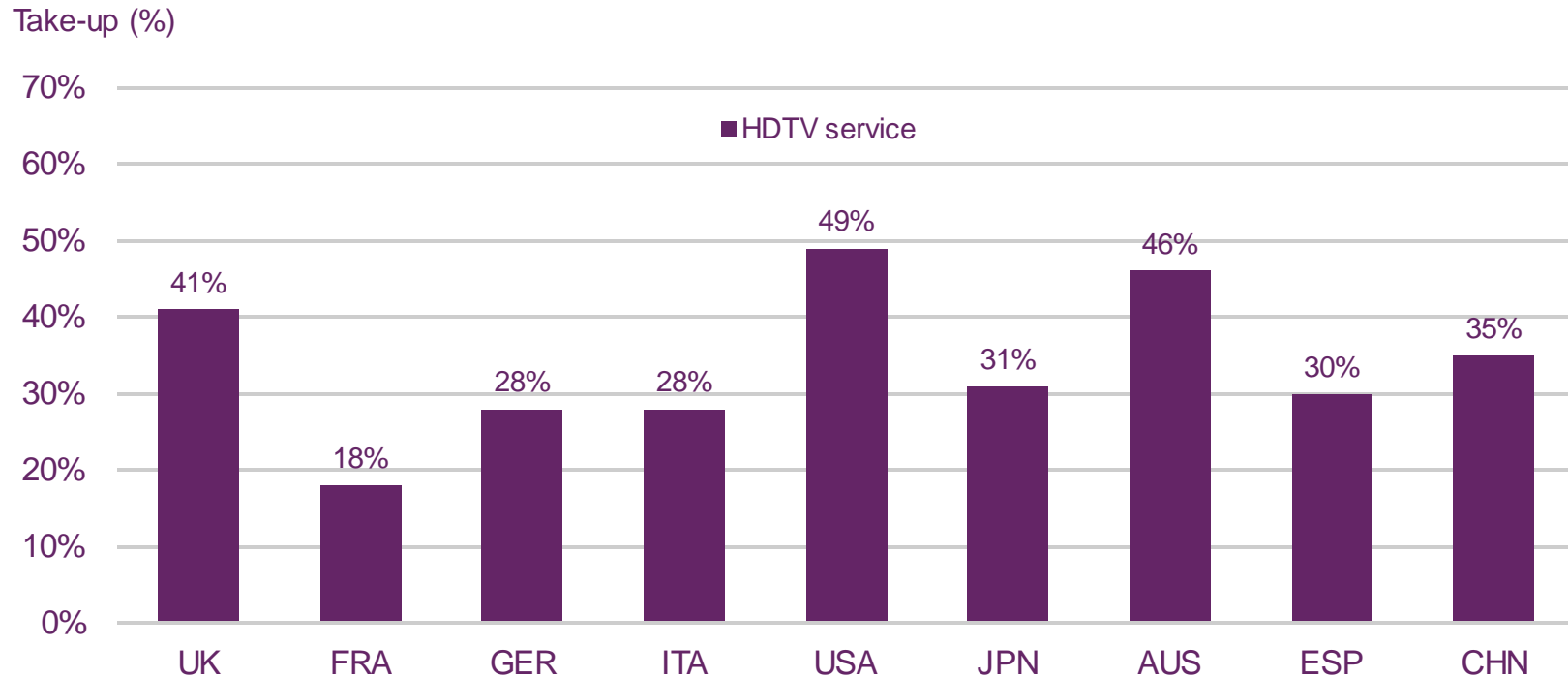
## Year on year changes in platform take-up (pp) by country and technical platform

	UK	FRA	GER	ITA	USA	CAN	JPN	AUS	ESP	NED	SWE	IRE	POL	BRA	RUS	IND	CHI
Digital terrestrial	-1	-1	0	4	0	-1	-1	9	1	0	3	2	1	3	1	0	1
Digital satellite	2	0	1	1	0	0	0	0	0	0	0	1	0	6	6	7	2
Digital cable	0	0	1	0	1	9	4	0	0	5	0	5	5	0	1	2	6
IPTV	0	4	1	-1	1	1	1	2	0	6	2	1	0	0	1	0	1
<b>Total digital</b>	<b>1</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>2</b>	<b>9</b>	<b>4</b>	<b>11</b>	<b>2</b>	<b>11</b>	<b>5</b>	<b>8</b>	<b>7</b>	<b>10</b>	<b>9</b>	<b>9</b>	<b>9</b>
Analogue terrestrial	-1	-2	0	0	0	0	-1	-11	0	0	0	-1	-2	-10	-9	-7	-6
Analogue satellite	0	-1	-3	-1	0	0	0	0	-2	0	0	0	0	0	0	0	0
Analogue cable	0	-1	-4	0	-2	-8	-2	0	0	-9	-4	-6	-5	0	0	-1	-3
<b>Total analogue</b>	<b>-1</b>	<b>-3</b>	<b>-6</b>	<b>-1</b>	<b>-2</b>	<b>-9</b>	<b>-4</b>	<b>-11</b>	<b>-2</b>	<b>-9</b>	<b>-4</b>	<b>-8</b>	<b>-7</b>	<b>-10</b>	<b>-9</b>	<b>-9</b>	<b>-9</b>

Source: IDATE / industry data / Ofcom

# Figure 3.30

## Take-up of high definition TV service



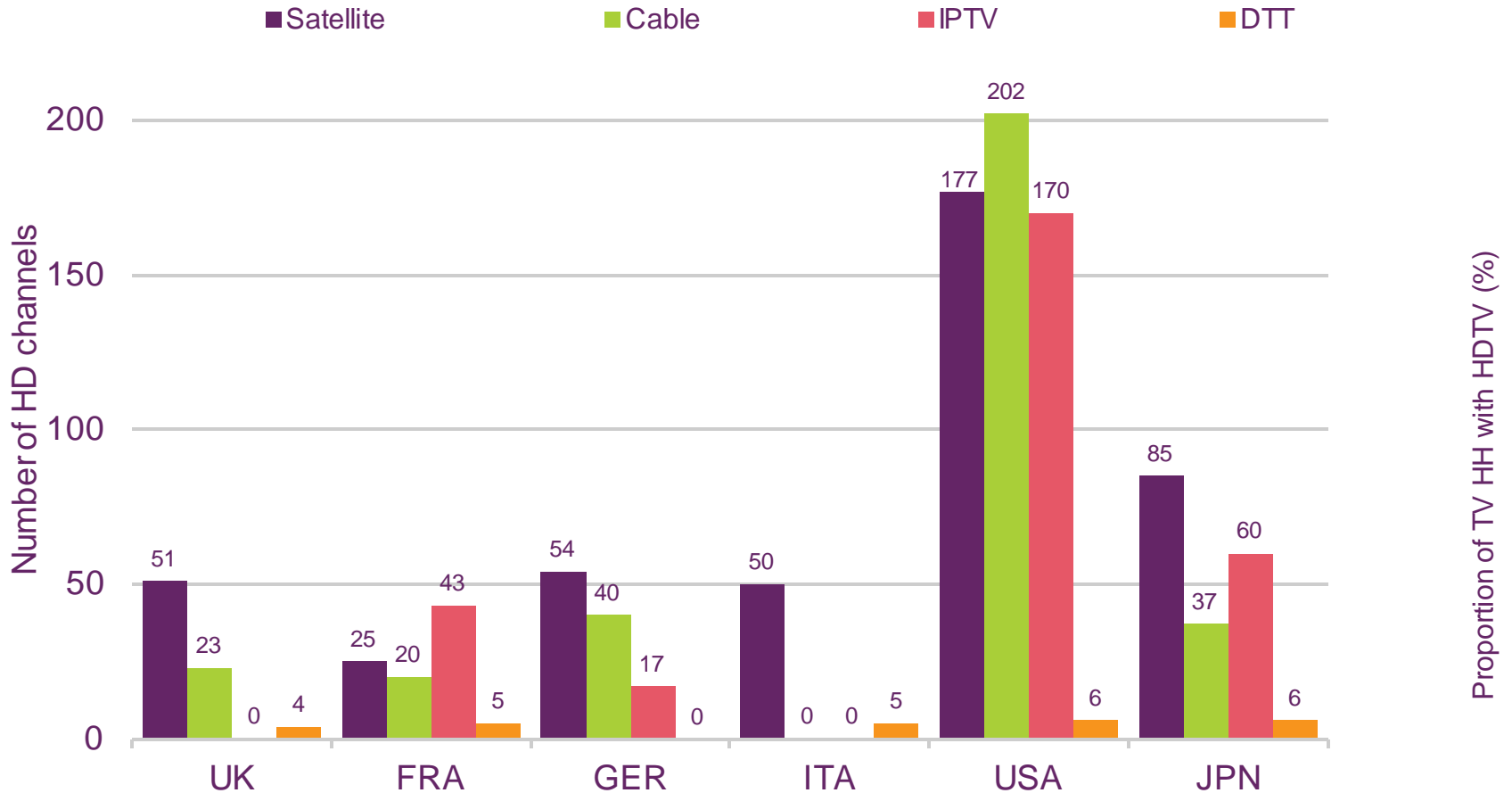
Source: Ofcom Consumer Research October 2012

Base: Total sample size UK=1065, France=1016, Germany=1024, Italy=1015, US=1010, Japan=1004, Australia=1007, Spain=1001, China=1010

Q: Which of the following devices do you own and personally use?

# Figure 3.31

## Number of HDTV channels, end 2011



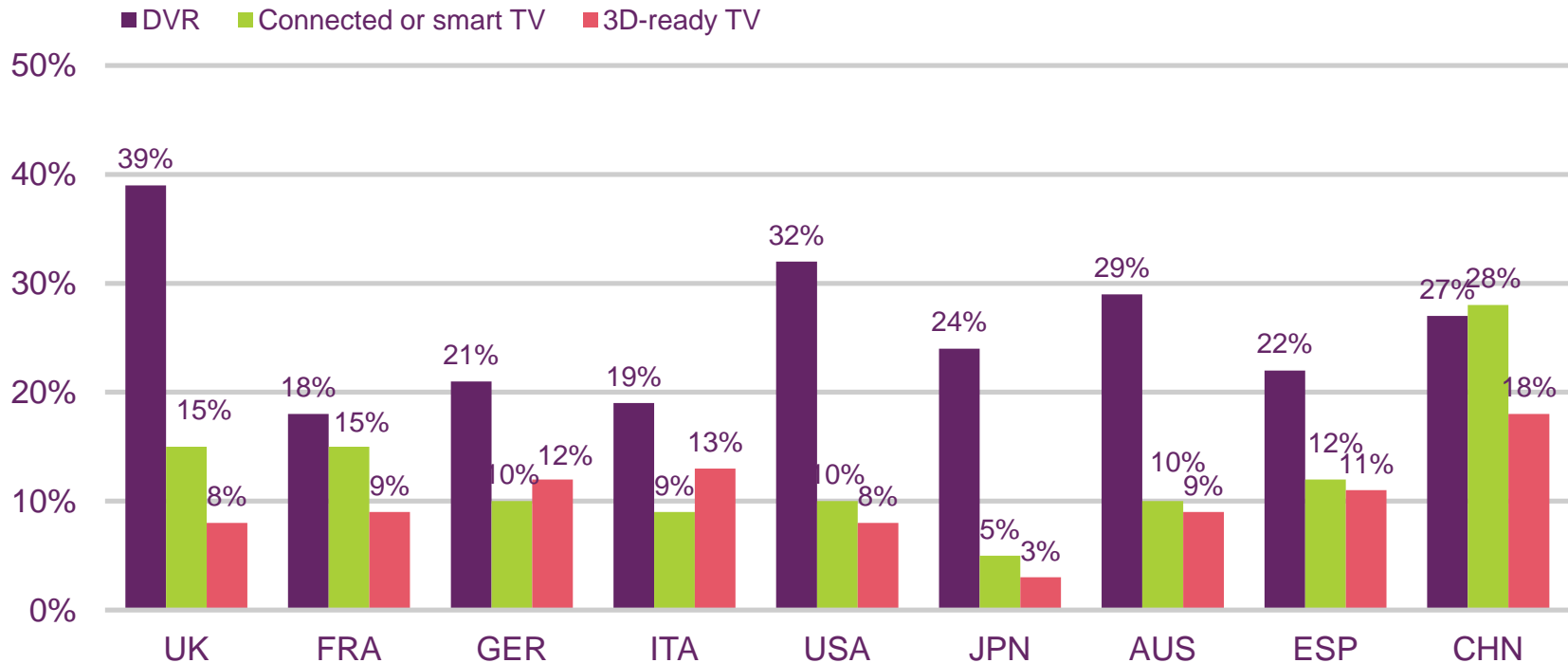
Source: IDATE / industry data / Ofcom.



# Figure 3.32

## Take-up of digital video recorders, connected TVs and 3D-ready TVs

Take-up (%)



Source: Ofcom Consumer Research October 2012

Base: Total sample size UK=1065, France=1016, Germany=1024, Italy=1015, US=1010, Japan=1004, Australia=1007, Spain=1001, China=1010

Q: Which of the following devices do you own and personally use?

# Figure 3.33

## Take-up of pay television among groups of comparator countries

Proportion of TV households (%)

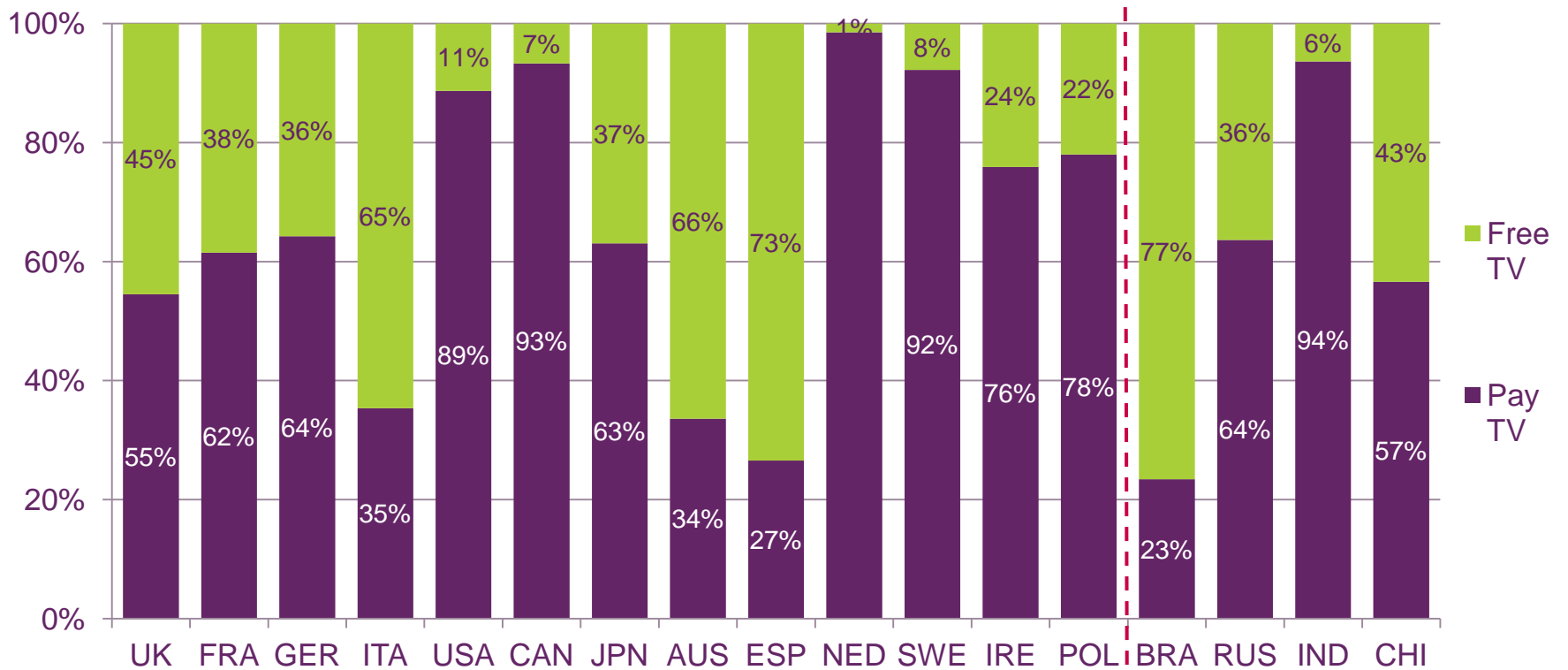


Source: IDATE / industry data / Ofcom. Note: 'Europe' in this context means those European countries within our comparator set. 'Total' in this context means the 17 countries in this report's comparator set.

# Figure 3.34

## Take-up of pay and free-to-air television, end 2011

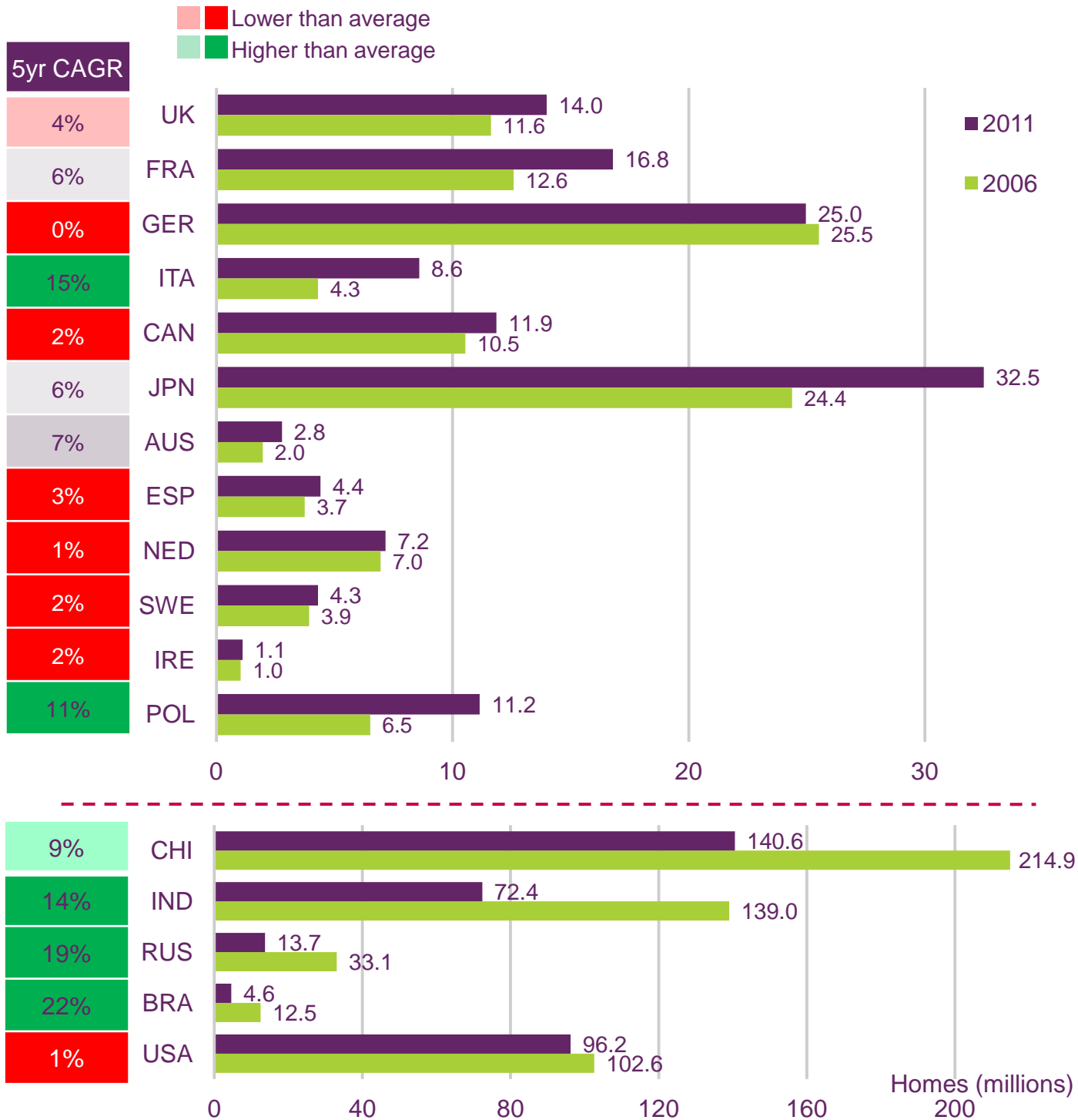
Proportion of TV households (%)



Source: IDATE / industry data / Ofcom

# Figure 3.35

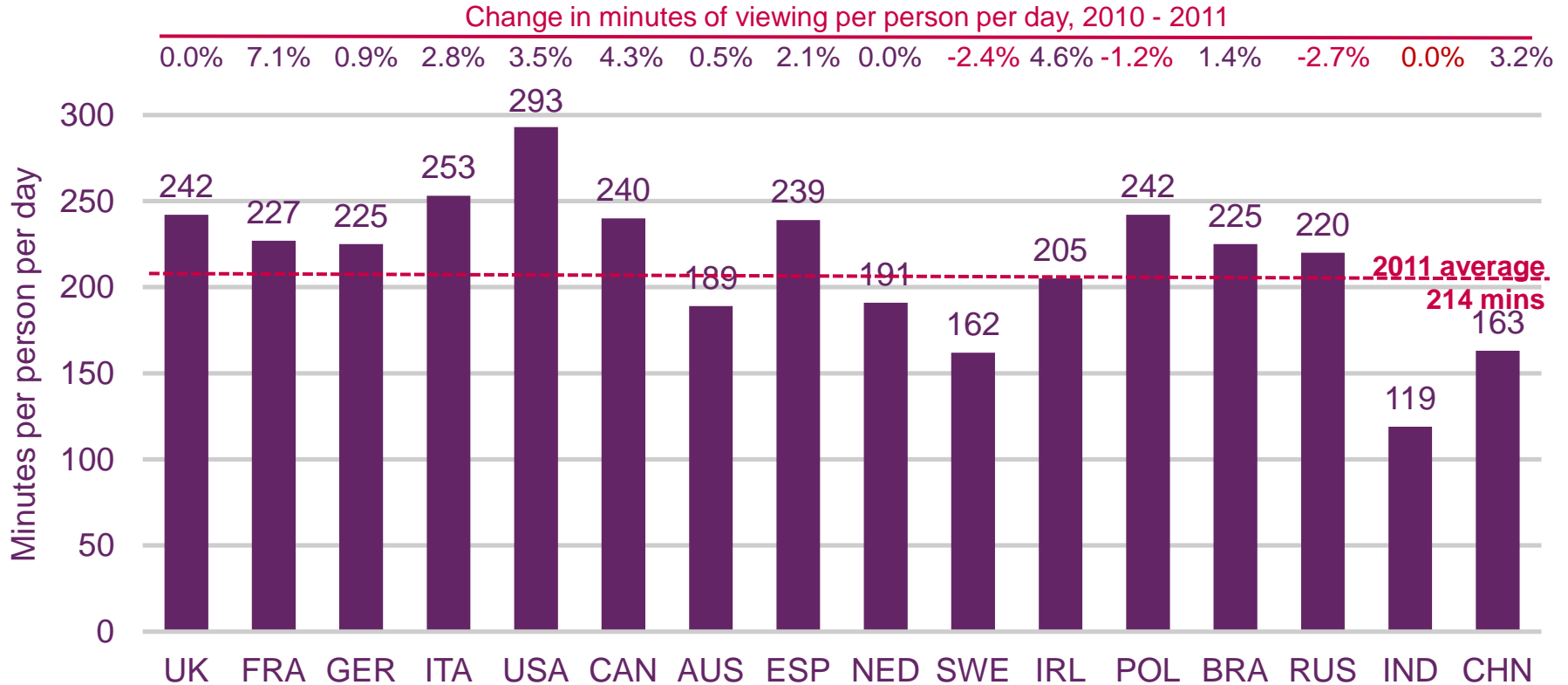
## Pay television take-up in 2006 and 2011, millions of homes



Source: IDATE / industry data / Ofcom

# Figure 3.36

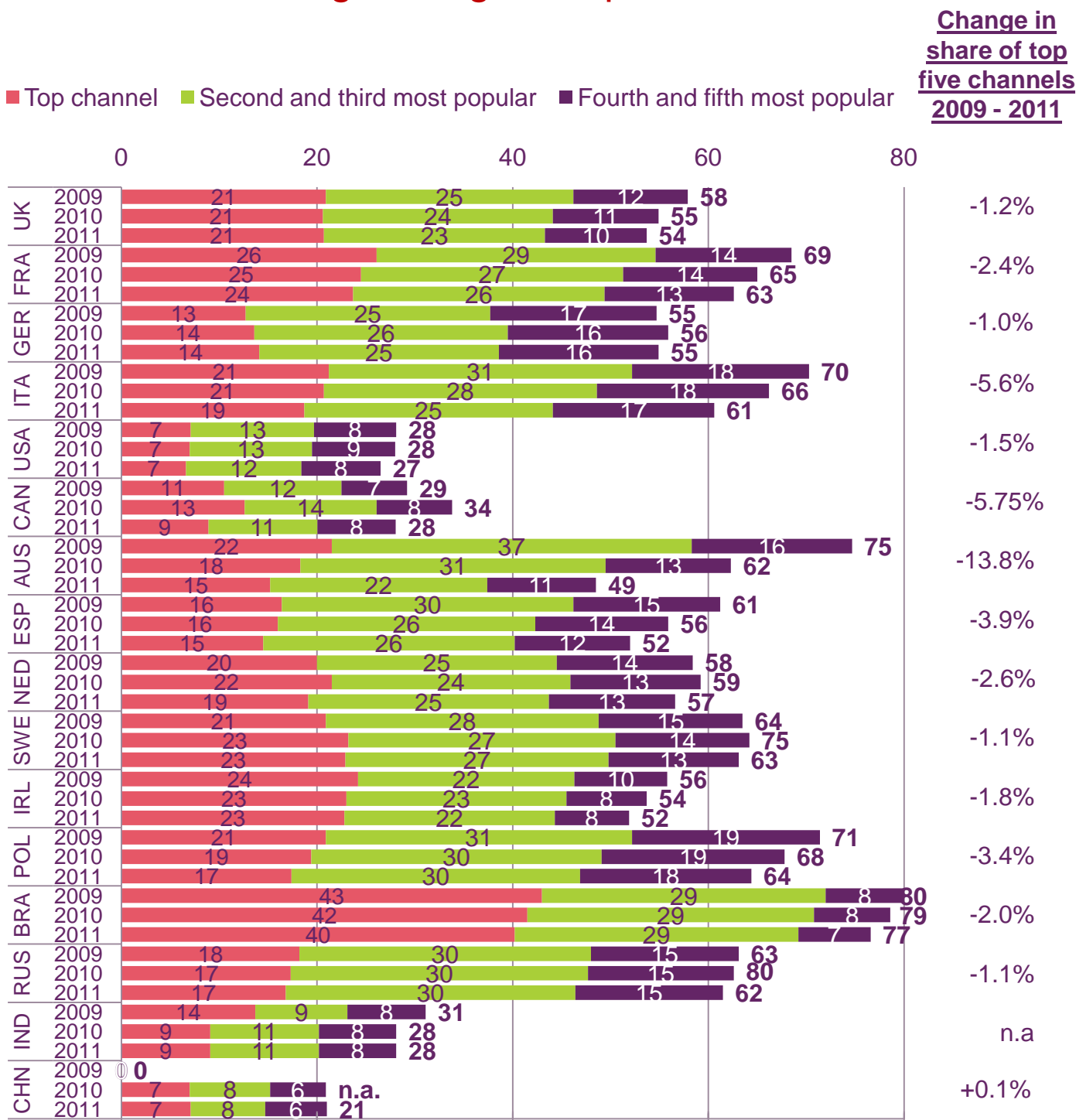
## Daily TV viewing per head, 2010 - 2011



Source: Médiamétrie, Eurodata TV Worldwide. The figure for Canada relates to the viewing in non-Quebec households.

# Figure 3.37

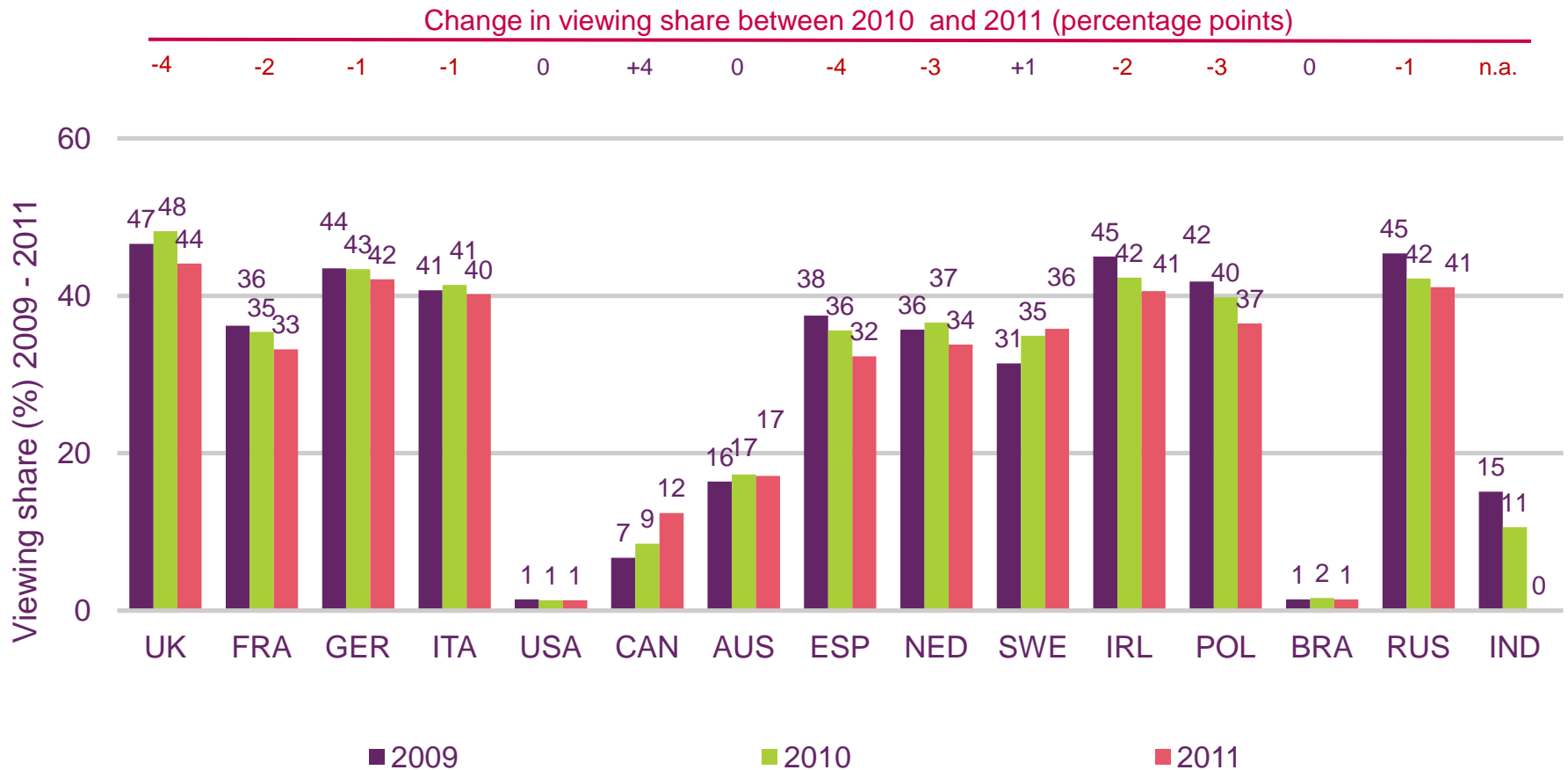
## Patterns of viewing among the top five TV channels



Source: Médiamétrie, Eurodata TV Worldwide. The figure for Canada relates to the viewing in non-Quebec households.

# Figure 3.38

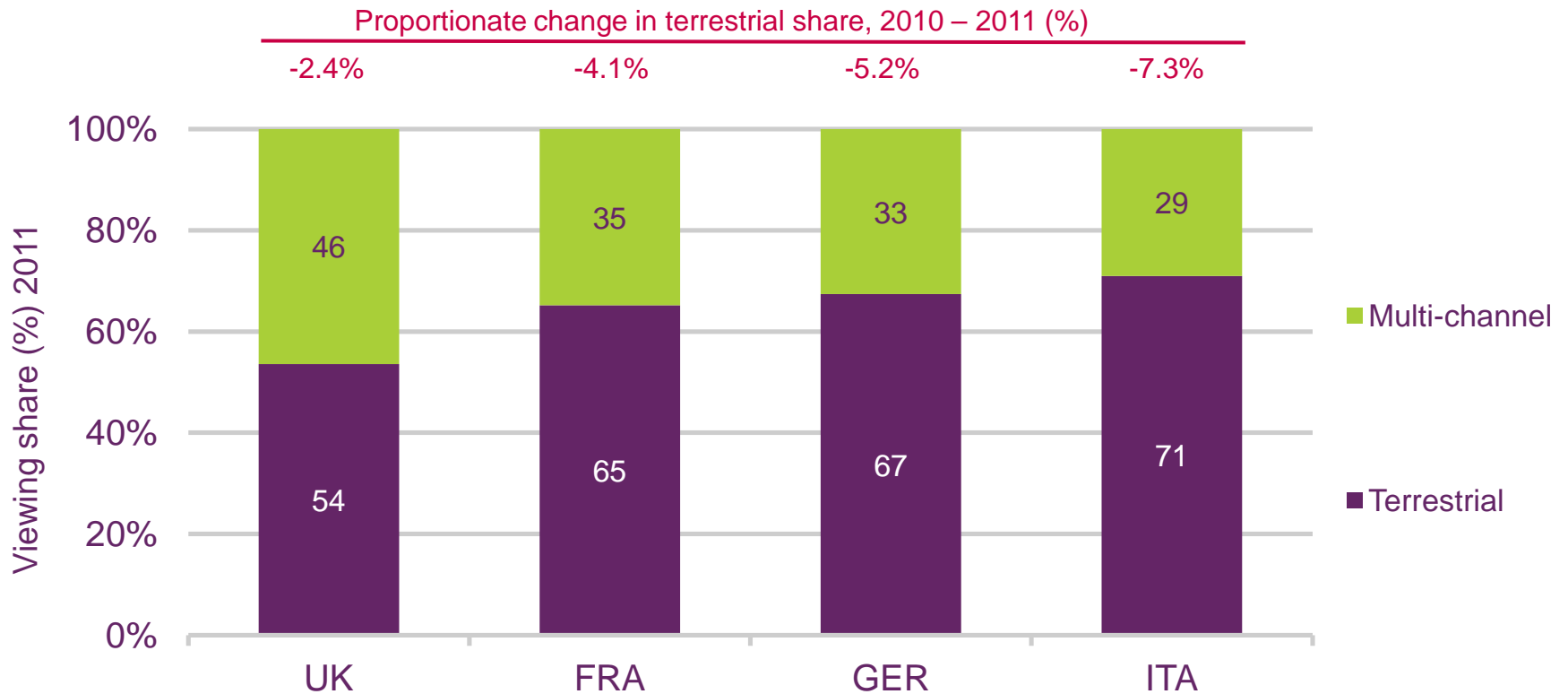
## Viewing of publicly funded channels



Source: Médiamétrie, Eurodata TV Worldwide. The figure for Canada relates to the viewing in non-Quebec households.

# Figure 3.39

## Terrestrial versus multi-channel share



Source: Médiamétrie, Eurodata TV Worldwide. The figure for Canada relates to the viewing in non-Quebec households.