ICMR 2015: TV and audio-visual

Chart pack

Figure 3.1

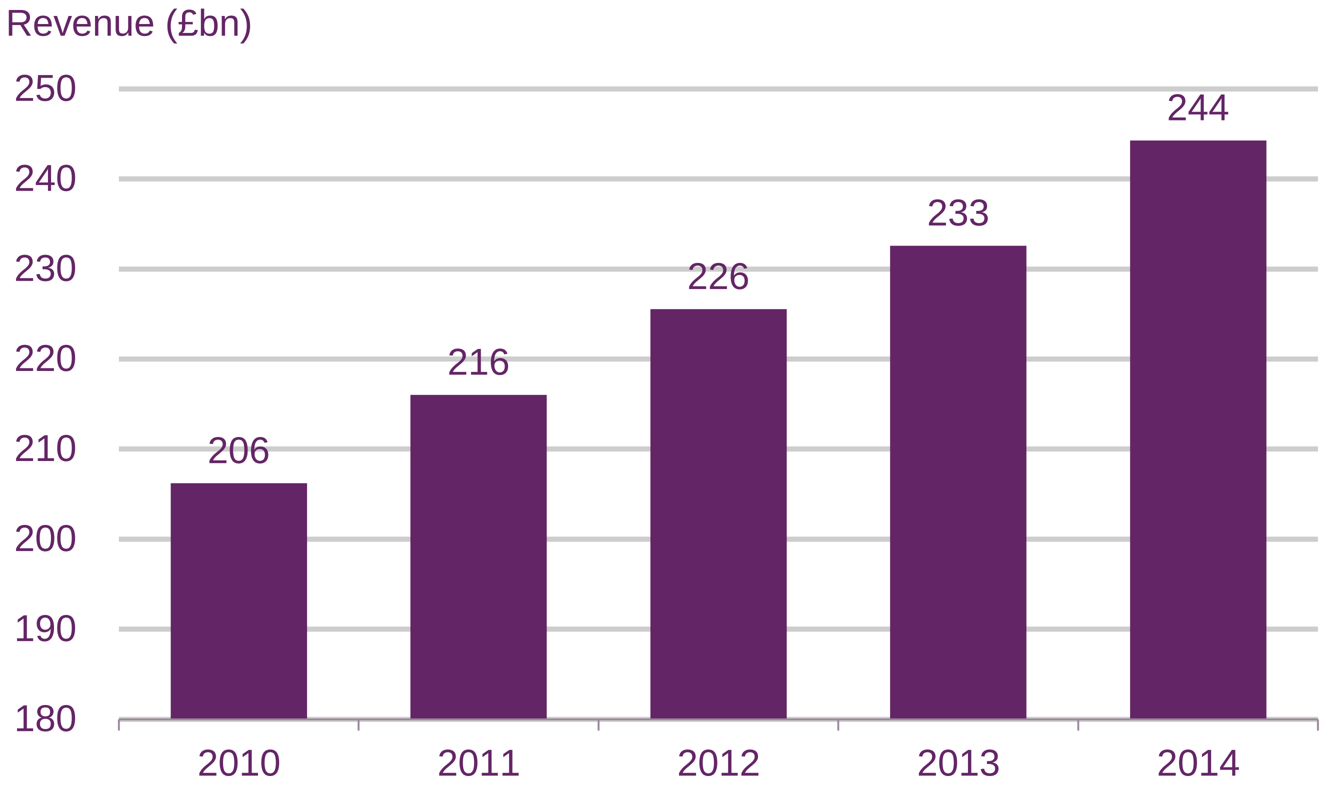
TV industry metrics: 2014

		UK	FRA	GER	ITA	USA	JPN	AUS	ESP	NED	SWE	POL	SGP	KOR	BRA	RUS	IND	CHN	NGA
TV revenue (£bn)		14.0	8.4	20.4	6.1	102.9	19.1	4.1	3.1	2.5	1.8	2.1	0.6	5.5	11.4	3.6	5.1	21.9	0.6
Revs change (% YOY)		4.0	0.4	2.9	-2.3	4.1	3.1	-0.3	9.1	-2.2	1.9	5.1	0.6	7.2	12.2	7.4	14.7	10.7	14.8
Revenue per cap (£)		216.4	130.4	247.4	100.2	322.6	150.2	174.3	65.9	146.5	184.3	55.7	101.9	111.7	56.5	25.1	4.0	16.0	3.2
from advertising		61	40	64	42	127	66	91	32	46	56	18	60	33	26	18	2	8	0
from subscription		97	56	71	37	195	55	53	29	76	89	36	42	72	30	7	3	8	2
From public funds		58	35	113	21	0	29	30	5	24	40	1	0	7	1	0	0	0	0
TV licence fee[1]		145.50	109.75	174.12	91.59	N/A	80.29	N/A	N/A	N/A	183.91	44.72	N/A	17.31	N/A	N/A	N/A	N/A	N/A
Largest TV platform	*Platform*	Dsat	IPTV	Dsat	DTT	Dcab	Dcab	DTT	DTT	Dcab	Acab	Dsat	DTT	IPTV	Dsat	Dsat	Dsat	Dcab	Dsat
	% of homes	45	41	43	73	43	50	67	69	47	26	50	37	30	52	36	42	43	69
DTV take-up (%)		100	95	72	100	96	100	100	99	87	74	86	100	76	72	65	70	84	84
Pay TV take-up (%)		59.5	76.9	55.2	30.1	87.2	69.0	31.6	28.8	98.6	83.1	83.2	62.8	96.7	32.8	65.9	85.2	62.5	22.4
DSO date		2012	2011	2008	2012	2009	2012	2013	2010	2006	2007	2013	2020	2012	2018	2018	N/A	2020	2016
TV viewing (min/day)		220	221	221	262	282	264	204	239	200	153	260	N/A	196	224	239	N/A	157	N/A

Source: IHS / industry data / Ofcom

Figure 3.2

Global TV broadcast advertising, public licence fee and channel subscription revenues

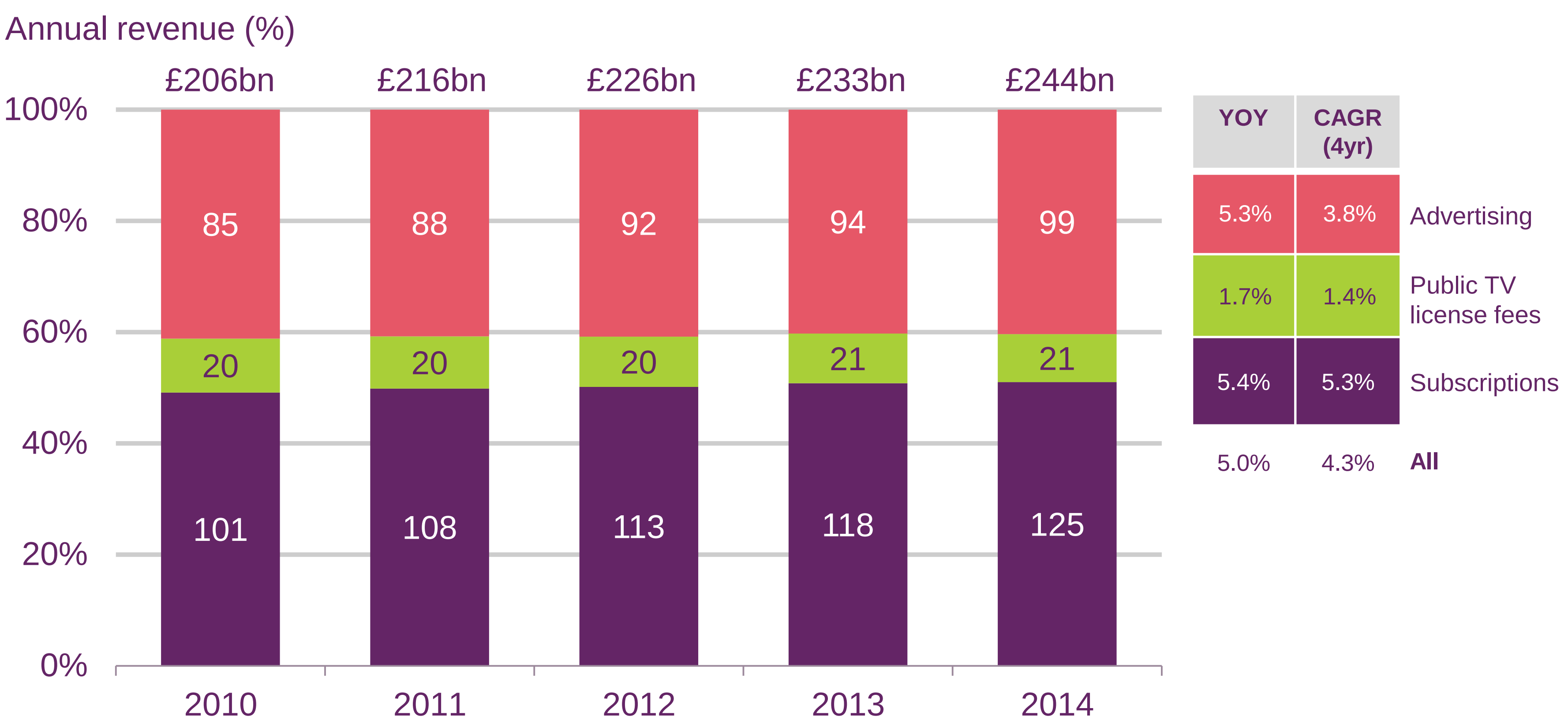


YOY	CAGR (4yr)
5.0%	4.3%

Source: Data derived from PwC Global Entertainment and Media Outlook: 2015-2019 @ www.pwc.com/outlook. Notes: Ofcom is responsible for all growth calculations displayed. Ofcom uses an exchange rate of $1.646 to the GBP in line with the IMF average for 2014. All figures are expressed in nominal terms.

Figure 3.3

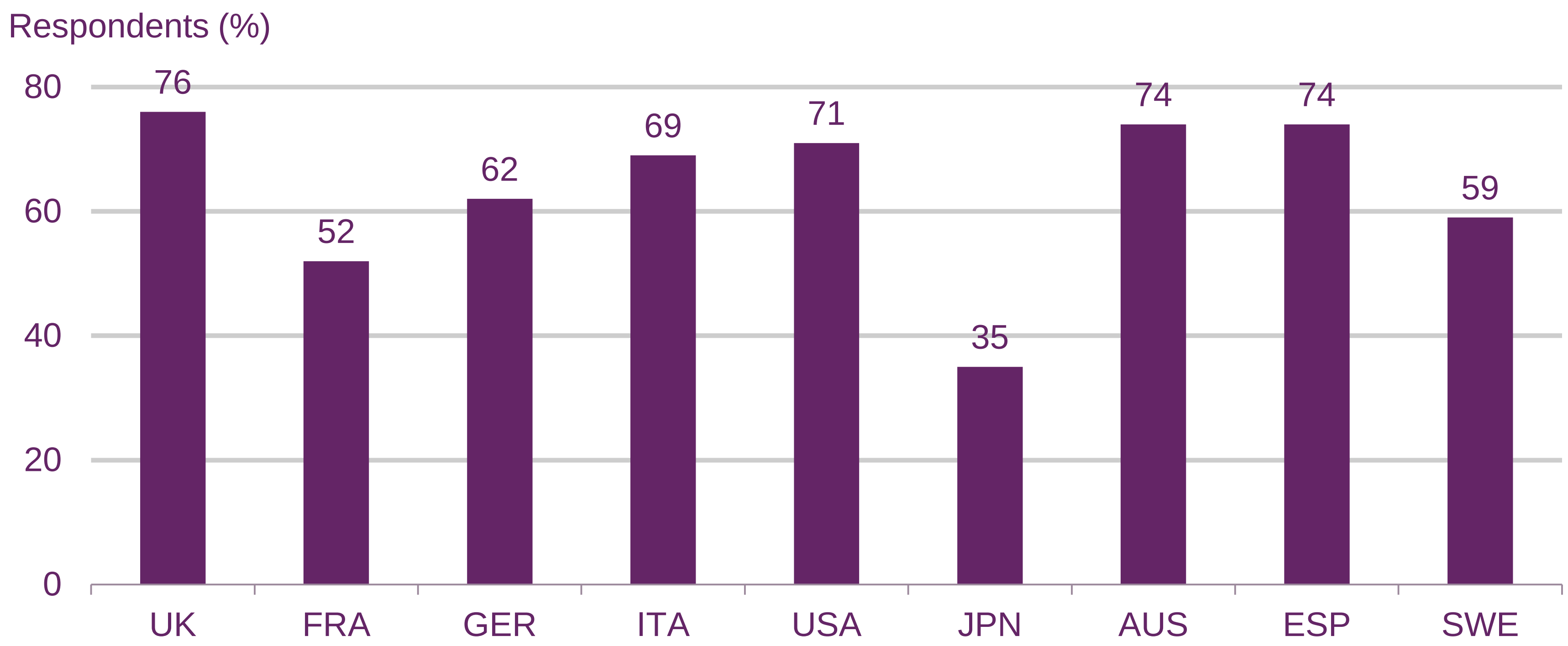
Global TV industry revenues, by source



Source: Data derived from PwC Global Entertainment and Media Outlook: 2015-2019 @ www.pwc.com/outlook. Notes: Ofcom is responsible for all growth calculations displayed. Ofcom uses an exchange rate of $1.646 to the GBP in line with the IMF average for 2014. All figures expressed in nominal terms.

Figure 3.4

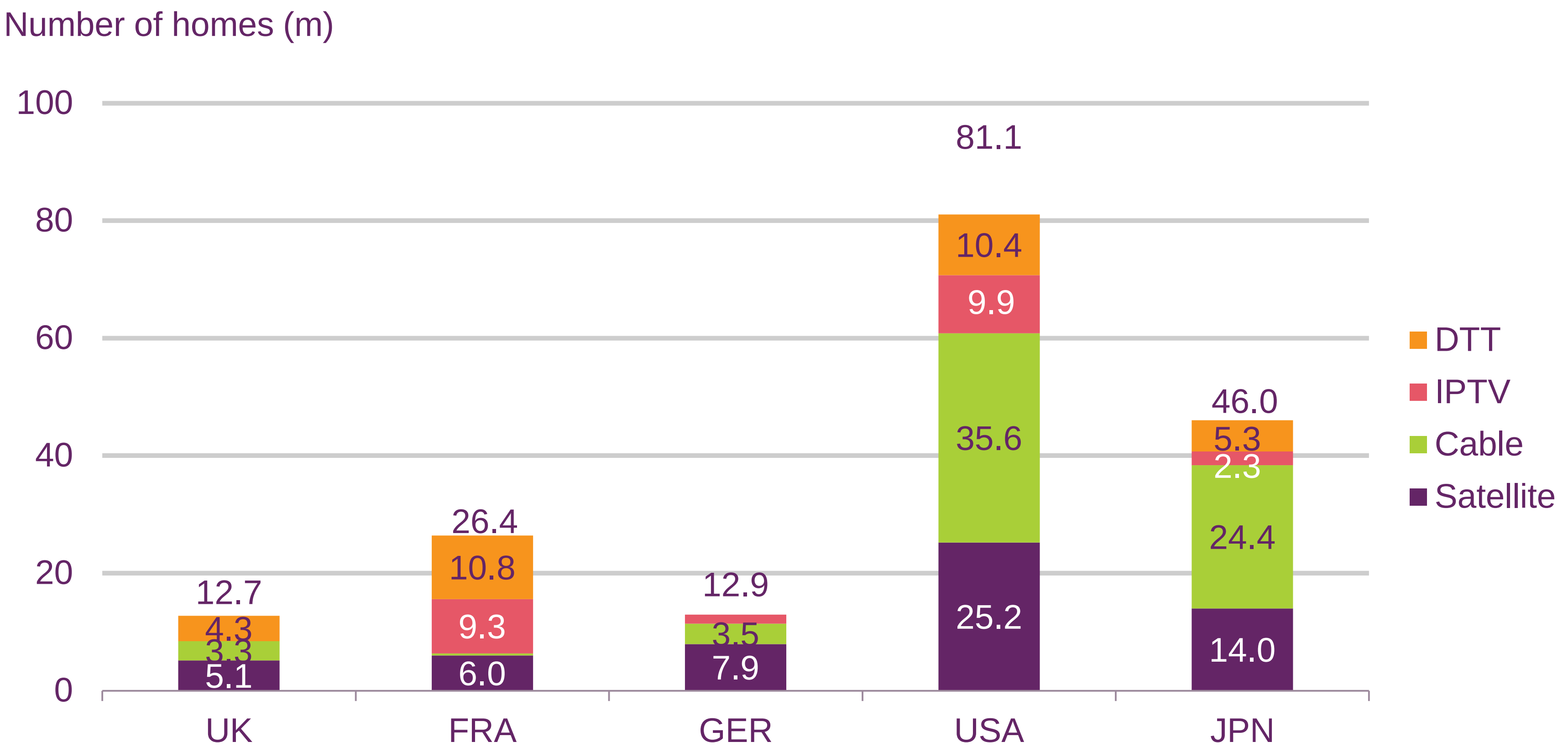
Household ownership of high-definition TV sets



Source: Ofcom consumer research September – October 2015
Base: All respondents, UK=1006, FRA=1003, GER=1007, ITA=1003, USA=1009, JPN=1006, AUS=1000, ESP=1002, SWE=1004
Q.3a Which of the following devices do you have in your home?

Figure 3.5

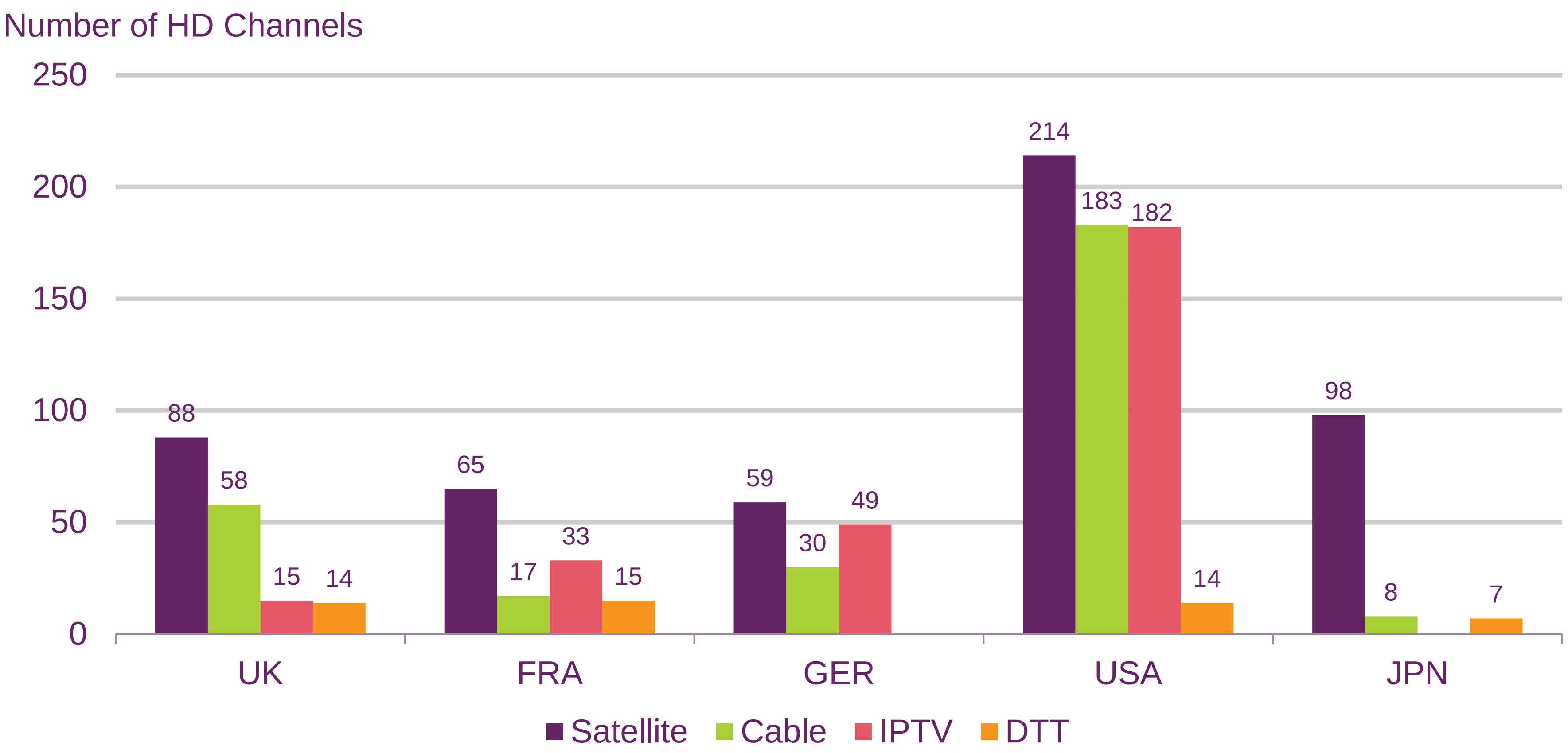
Number of HD homes, by platform and country: 2014



Source: IHS/ industry data/ Ofcom. Note: figures are for HD-enabled homes (those having the technical means to view HD content and access to sources of HD content).

Figure 3.6

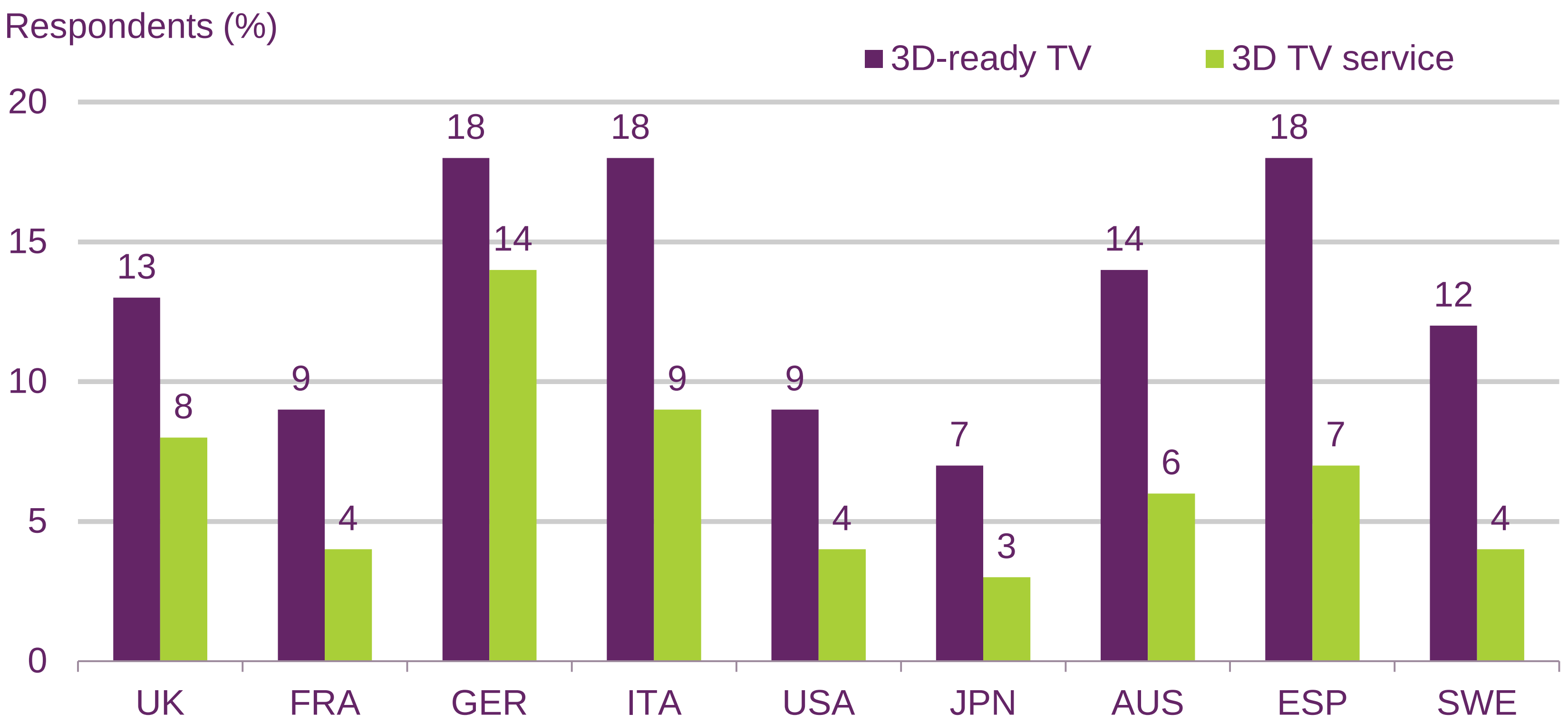
Number of HDTV channels: 2014



Source: IHS/ industry data/ Ofcom

Figure 3.7

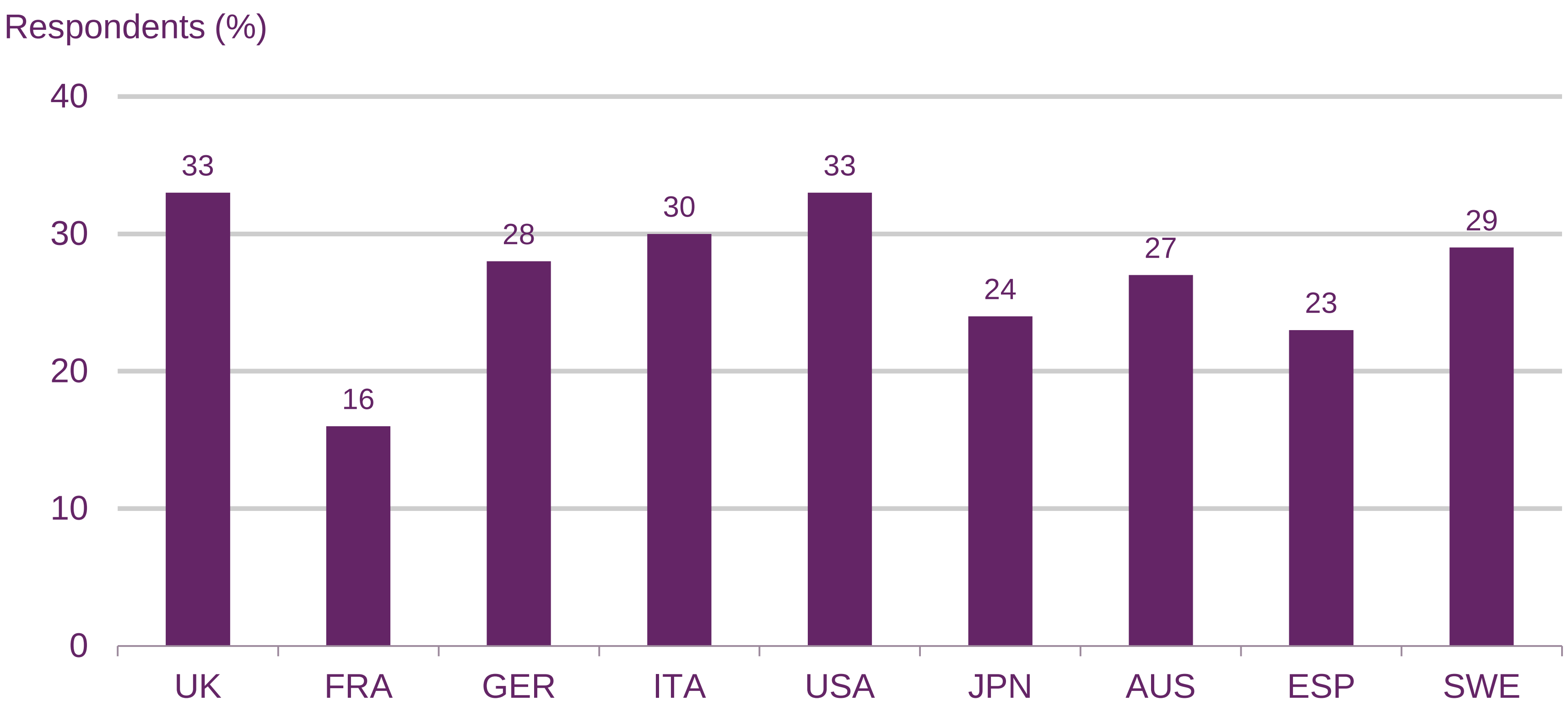
Household ownership of 3D-ready TV sets and 3D TV services



Source: Ofcom consumer research September - October 2015
Base: All respondents, UK=1006, FRA=1003, GER=1007, ITA=1003, USA=1009, JPN=1006, AUS=1000, ESP=1002, SWE=1004
Q.3a Which of the following devices do you have in your home? Q3b. Which of the following services do you have

Figure 3.8

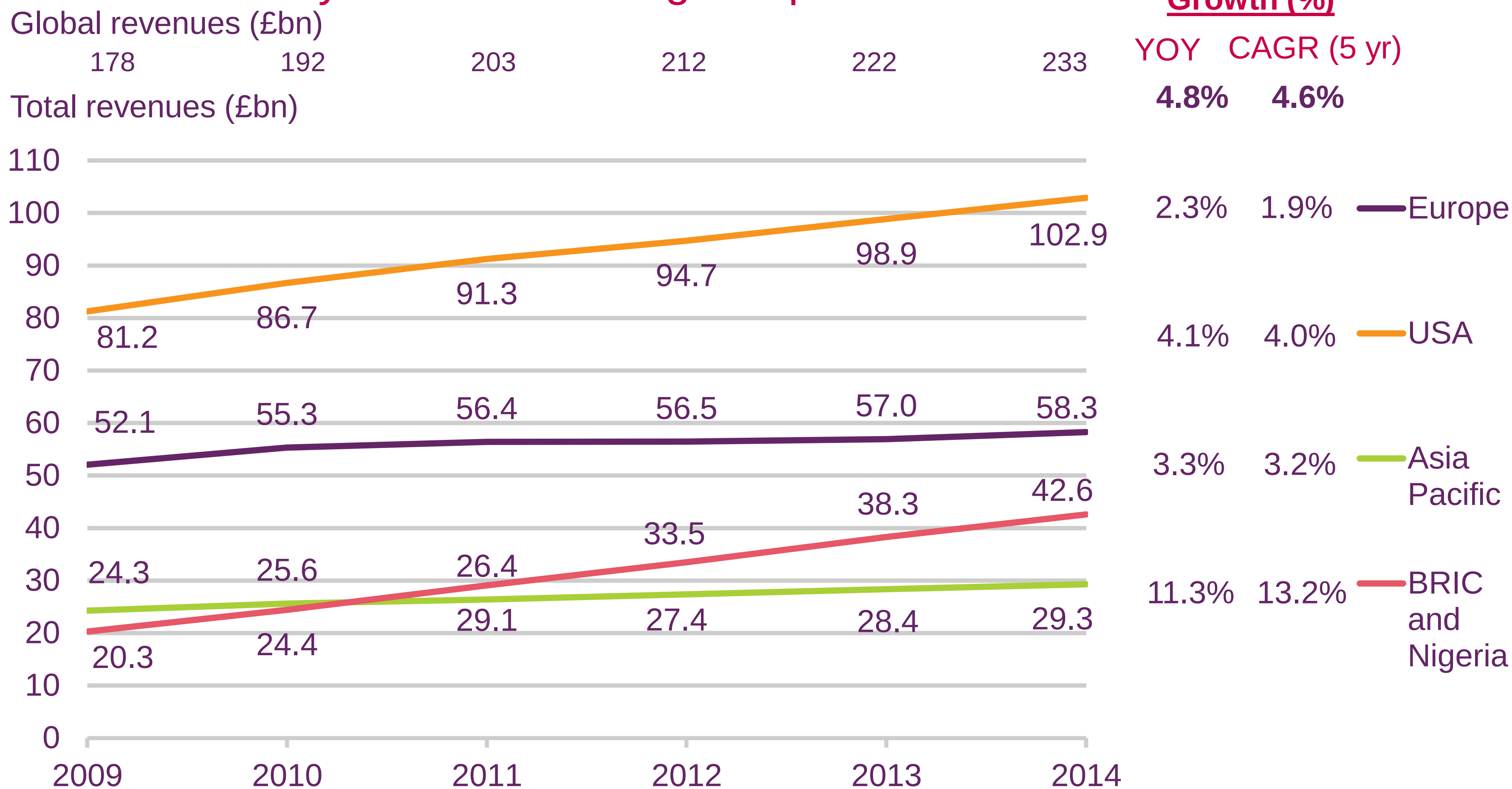
Household ownership of DVR



Source: Ofcom consumer research September - October 2015
Base: All respondents, UK=1006, FRA=1003, GER=1007, ITA=1003, USA=1009, JPN=1006, AUS=1000, ESP=1002, SWE=1004
Q.3a Which of the following devices do you have in your home?

Figure 3.9

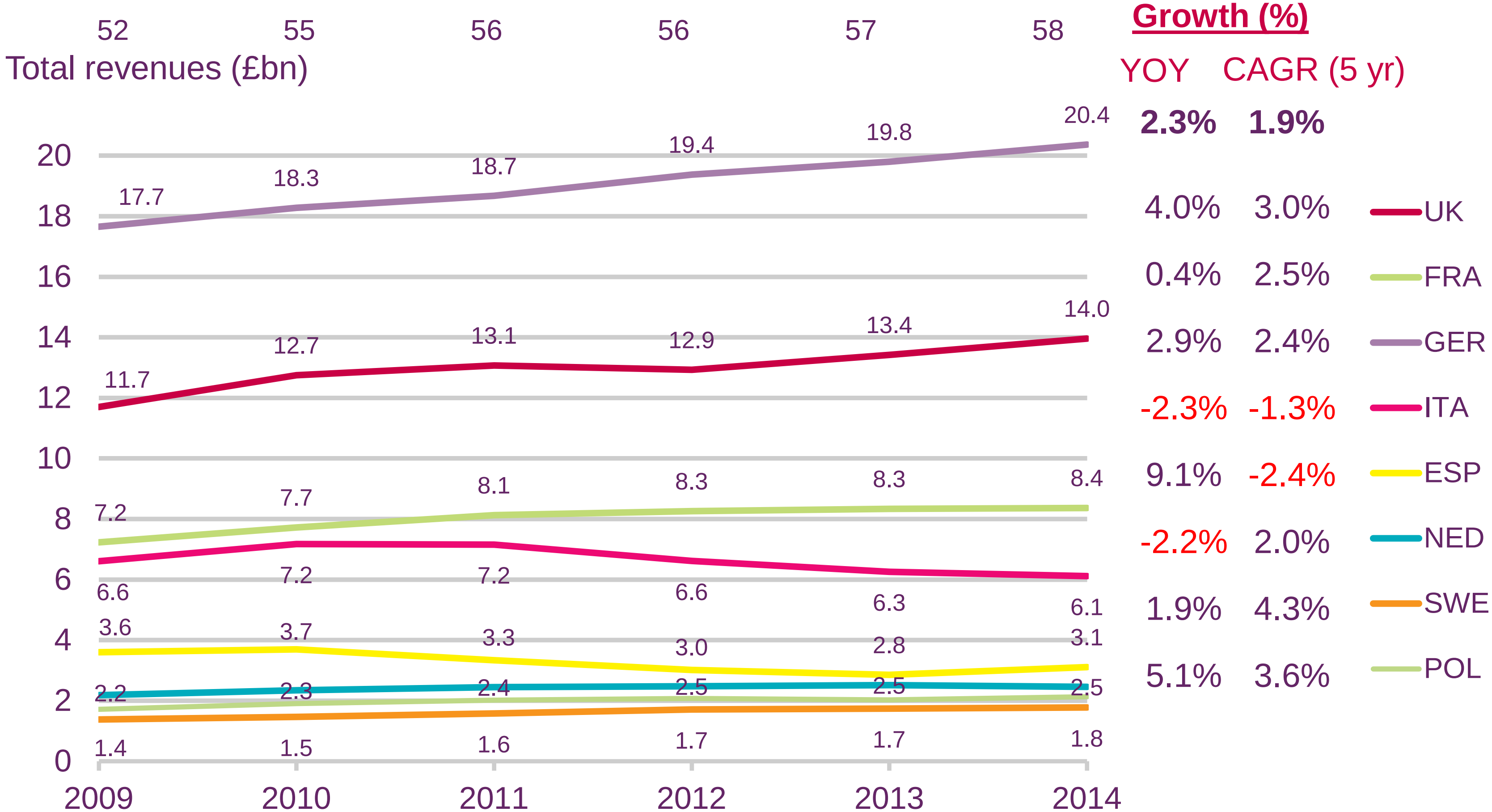
Total TV industry revenues among comparator countries



Source: IHS / industry data / Ofcom. Notes: Revenues include advertising, subscriptions and sources of public funding only. BRIC is Brazil, Russia, India and China. All figures expressed in nominal terms.

Figure 3.10

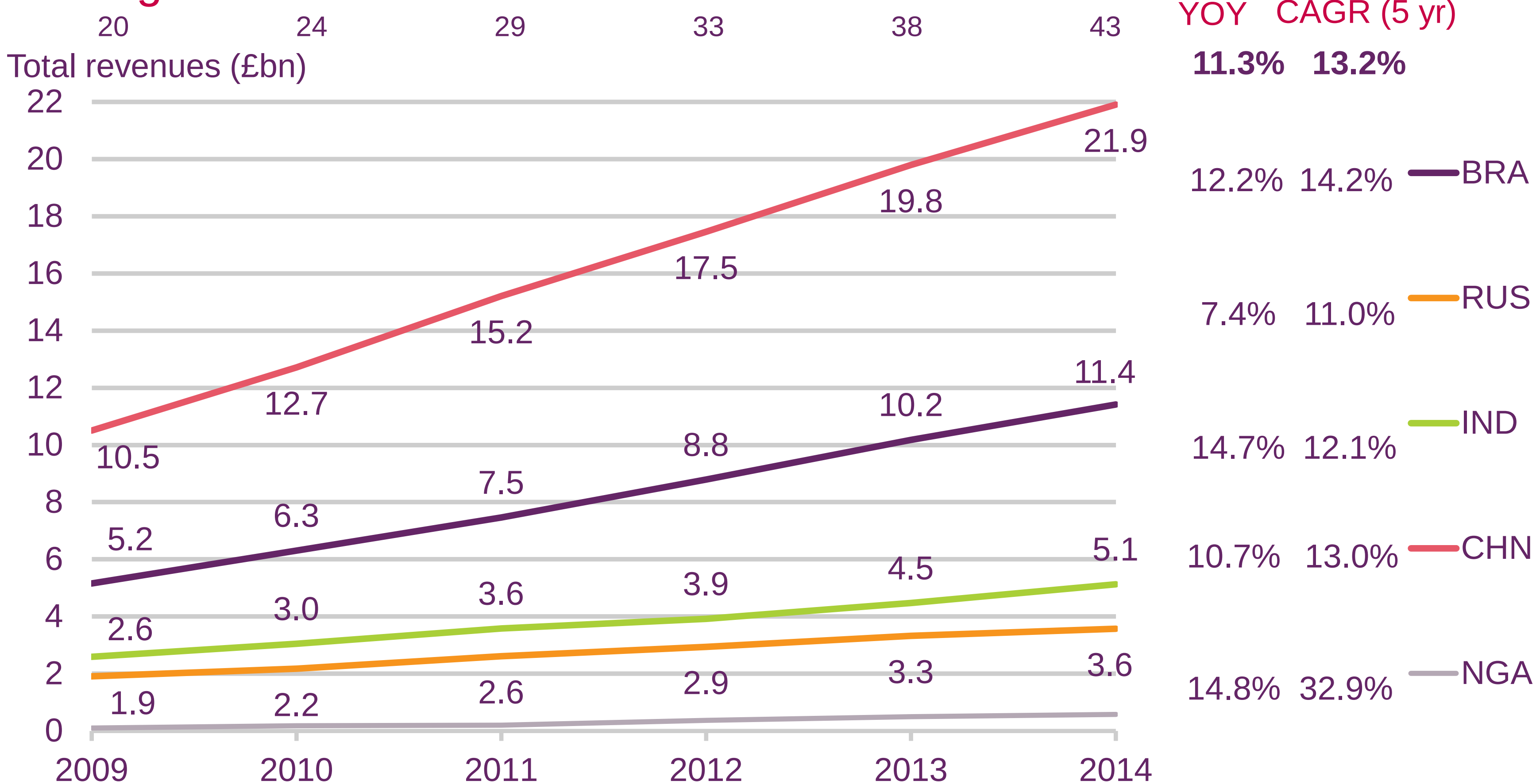
TV industry revenues among European countries



Source: IHS / industry data / Ofcom. Notes: Revenues include advertising, subscriptions and sources of public funding only. All figures expressed in nominal terms.

Figure 3.11

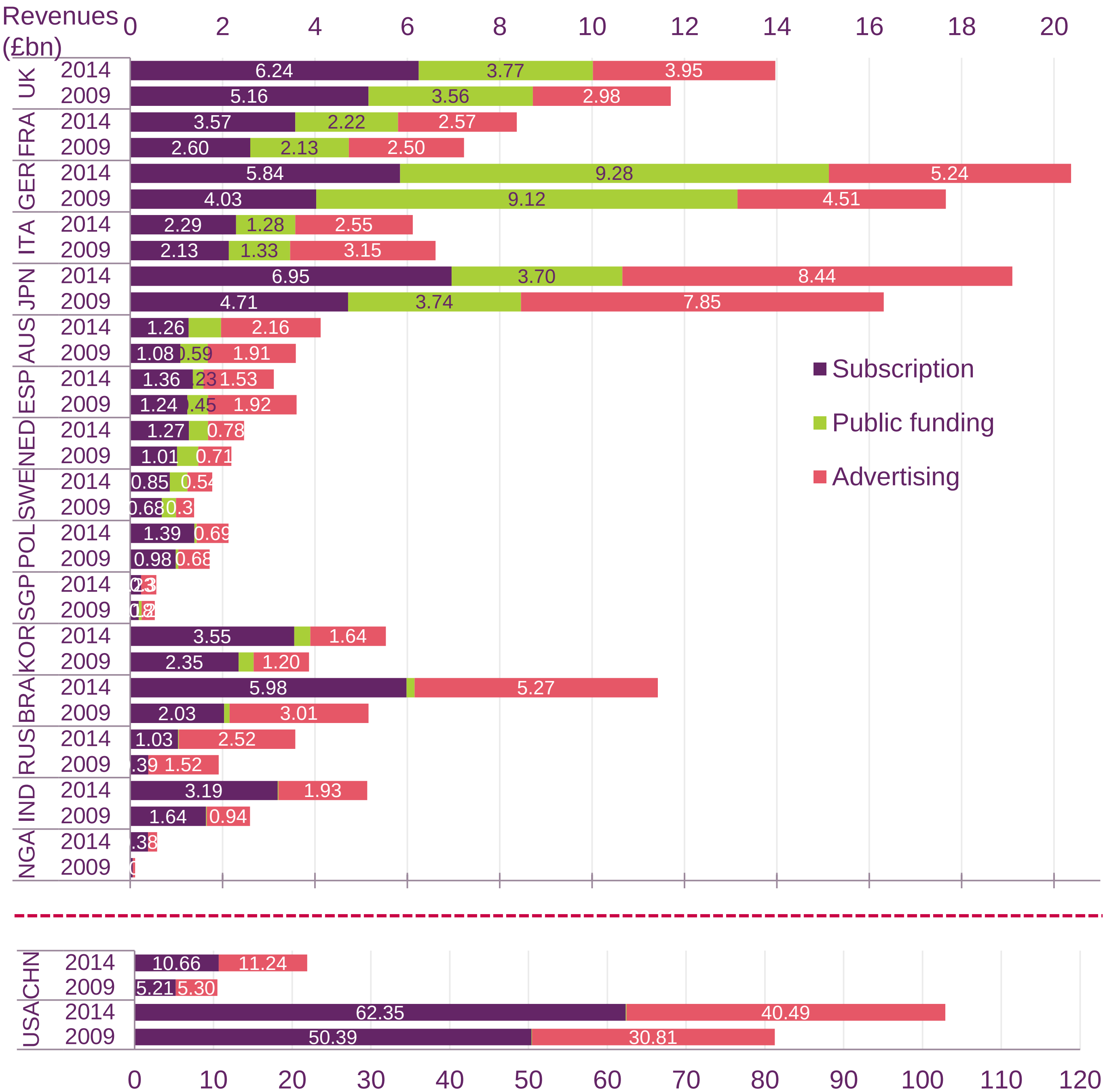
Total TV industry revenues among BRIC countries and Nigeria



Source: IHS / industry data / Ofcom. Notes: Revenues include advertising, subscriptions and sources of public funding only. BRIC is Brazil, Russia, India and China. All figures expressed in nominal terms.

Figure 3.12

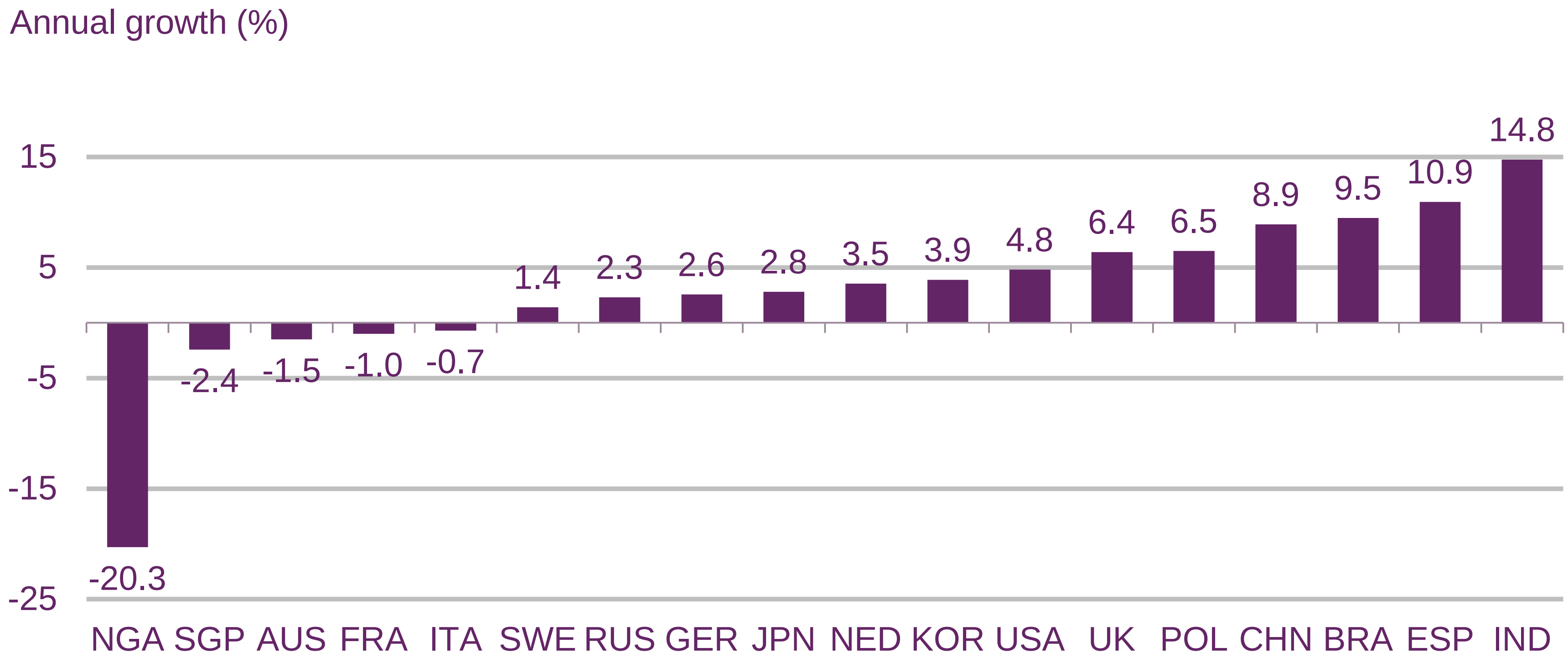
TV revenues among comparator countries by source, 2009 and 2014



Source: IHS / industry data / Ofcom. Notes: Revenues include advertising, subscriptions and sources of public funding only. Different scale used for the US and China due to larger size of those markets.

Figure 3.13

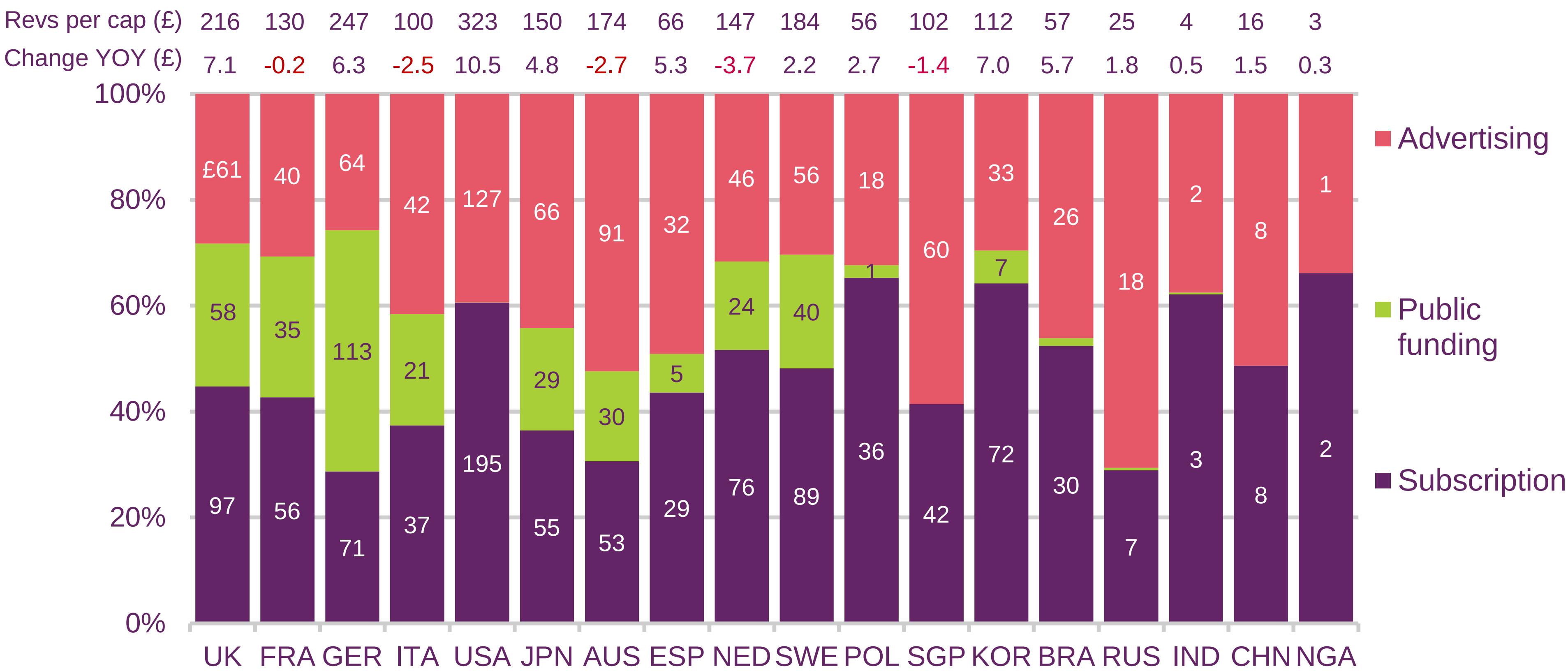
TV advertising revenue annual growth: 2013-2014



Source: IHS / industry data / Ofcom. All figures expressed in nominal terms.

Figure 3.14

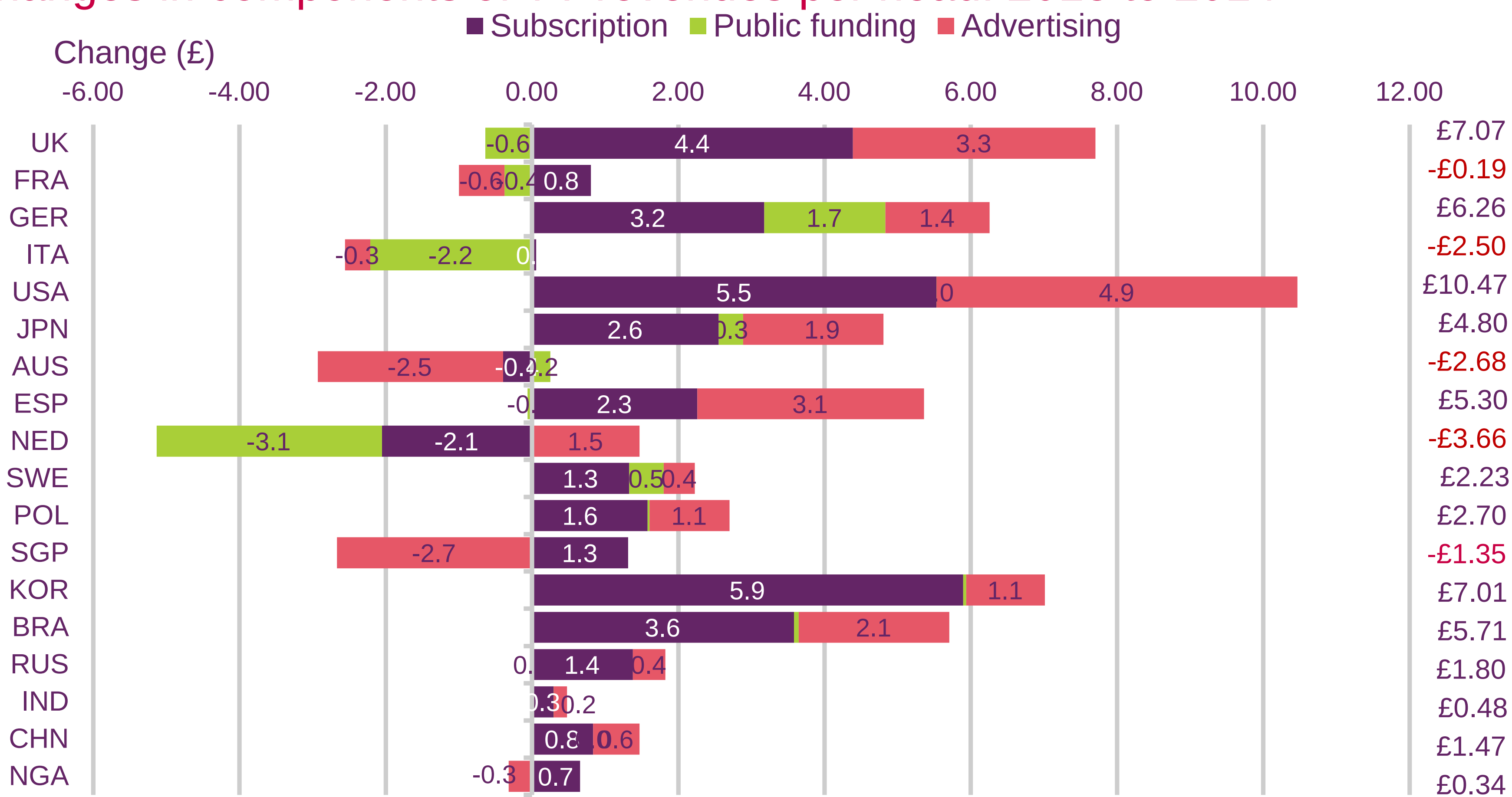
TV revenue per head, by revenue source: 2014



Source: IHS / industry data / Ofcom. Notes: Revenues include advertising, subscriptions and sources of public funding only; figures inside the bars represent industry revenue per head by source. All figures expressed in nominal terms.

Figure 3.15

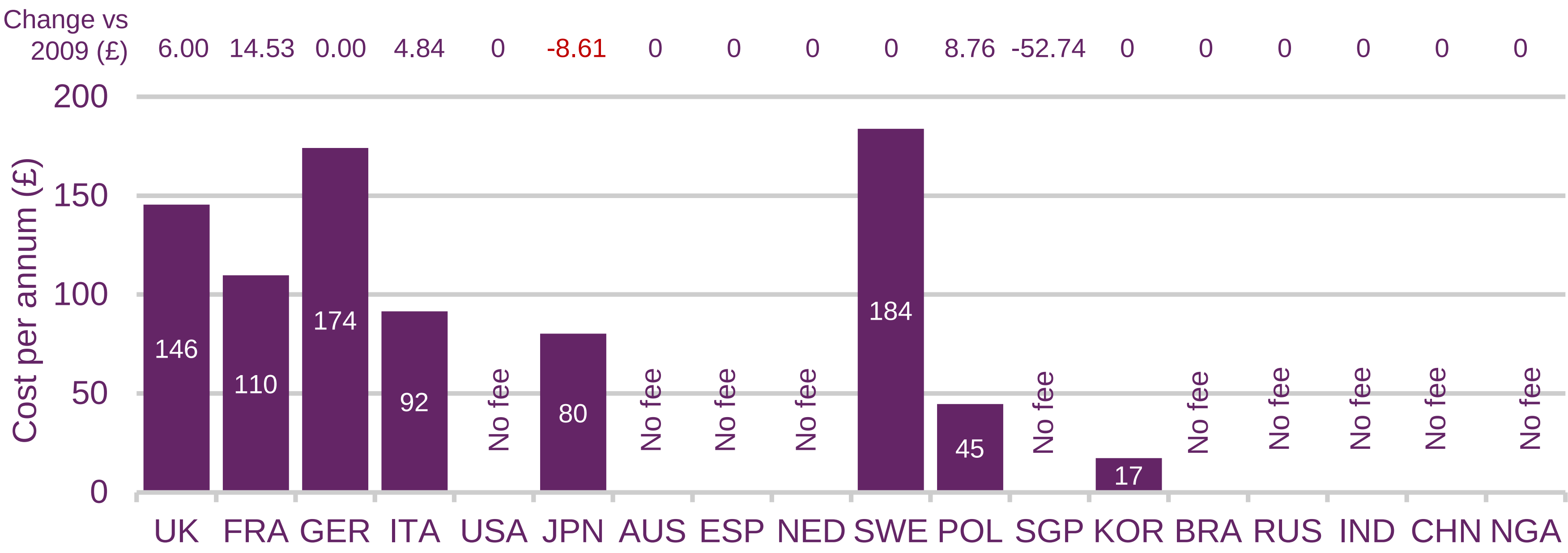
Changes in components of TV revenues per head: 2013 to 2014



Source: IHS / industry data / Ofcom. Notes: Revenues include advertising, subscriptions and sources of public funding only; the bars represent changes in industry revenue per head, by source. All figures expressed in nominal terms.

Figure 3.16

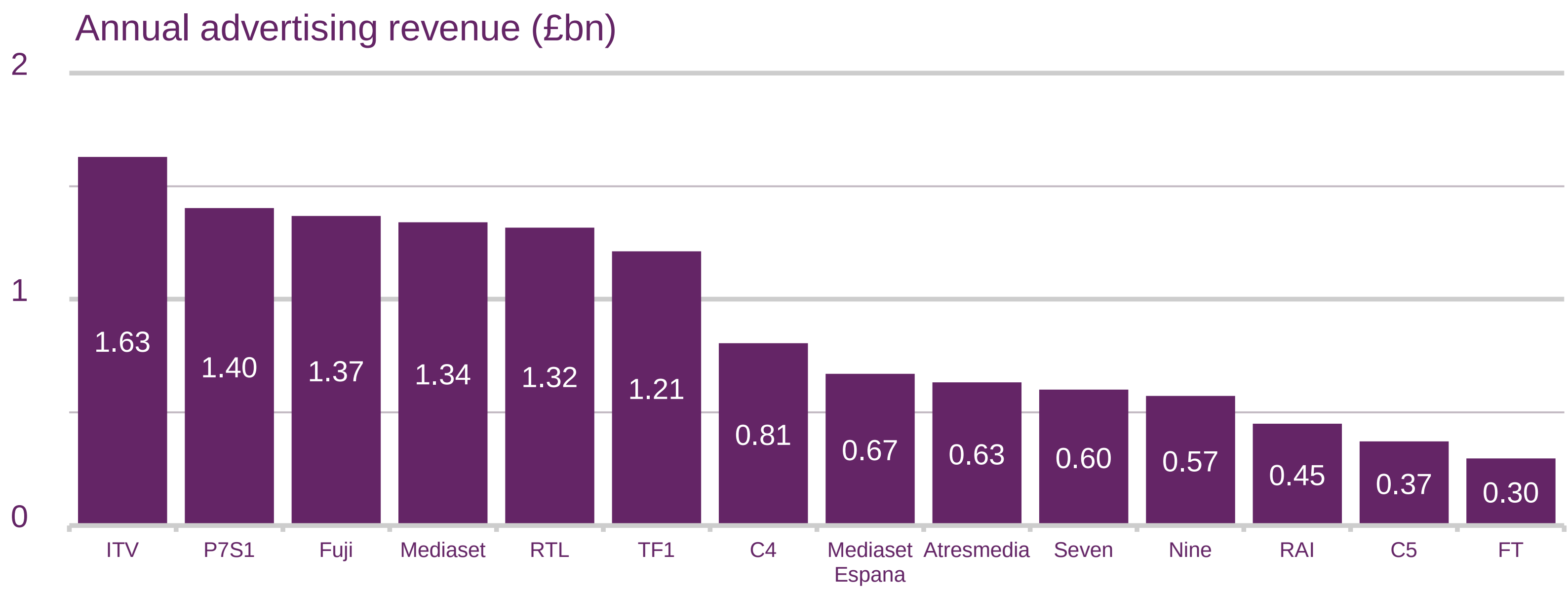
Cost of a TV licence fee: 2014



Source: IHS / industry data / Ofcom. All figures expressed in nominal terms.

Figure 3.17

Latest reported advertising revenues for selected free-to-view TV operators: 2014

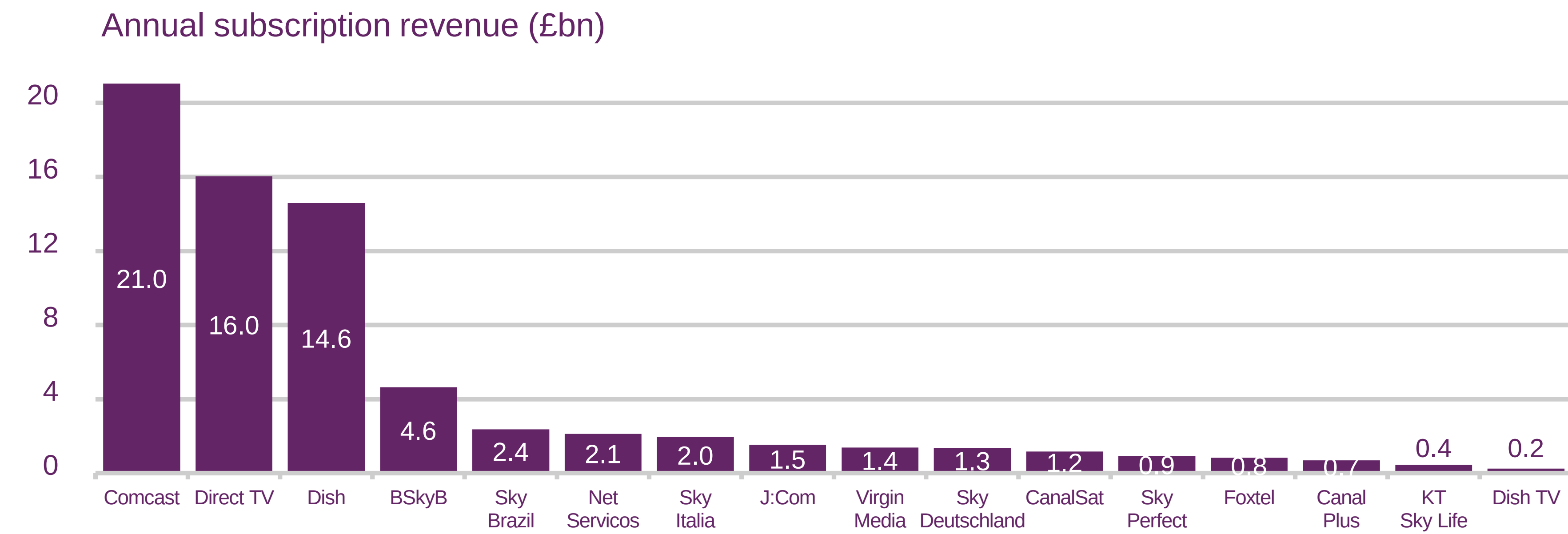


Territory	UK	GER	JPN	ITA	GER	FRA	UK	ESP	ESP	AUS	AUS	ITA	UK	FRA
YOY Change (%)	5.6	2.6	2.4	-3.8	1.2	-0.8	3.5	10.9	8.1	0.7	0.8	-4.0	5.6	-1.6
5 Yr CAGR (%)	3.2	1.8	-0.8	-5.1	2.0	-0.1	2.2	-0.3	0.6	3.2	5.2	-6.9	7.5	-2.6

Source: IHS / industry data / Ofcom. Notes: Comparisons should be regarded as indicative only due to the possibility of differences in financial reporting between broadcasters. All figures expressed in nominal terms.

Figure 3.18

Latest reported subscription revenues for selected pay-TV operators: 2014

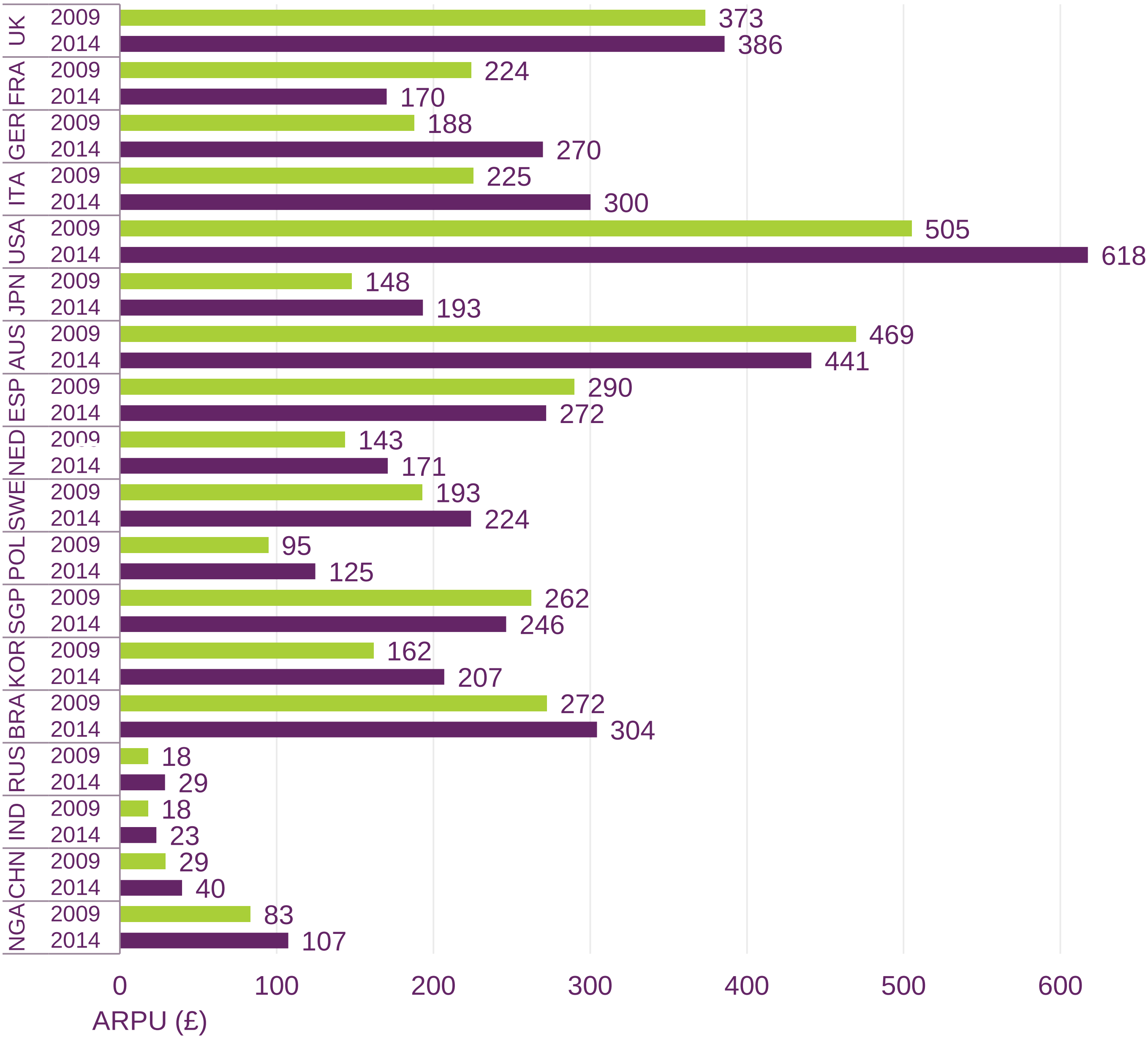


Territory	USA	USA	USA	UK	BRA	BRA	ITA	JPN	UK	GER	FRA	JPN	AUS	ESP	KOR	IND
5 Yr CAGR (%)	1.5	5.7	3.8	2.8	22.5	14.7	1.`	7.4	3.9	13.2	1.7	-0.8	15.9	-1.6	-1.8	21.4
YOY Change (%)	1.3	5.3	5.1	6.2	13.0	18.6	0.0	16.3	-3.1	12.9	-0.3	-6.5	-0.6	-4.0	-1.8	12.4

Source: IHS / industry data / Ofcom. Notes: Comparisons should be regarded as indicative only due to the possibility of differences in financial reporting between broadcasters. All figures expressed in nominal terms.

Figure 3.19

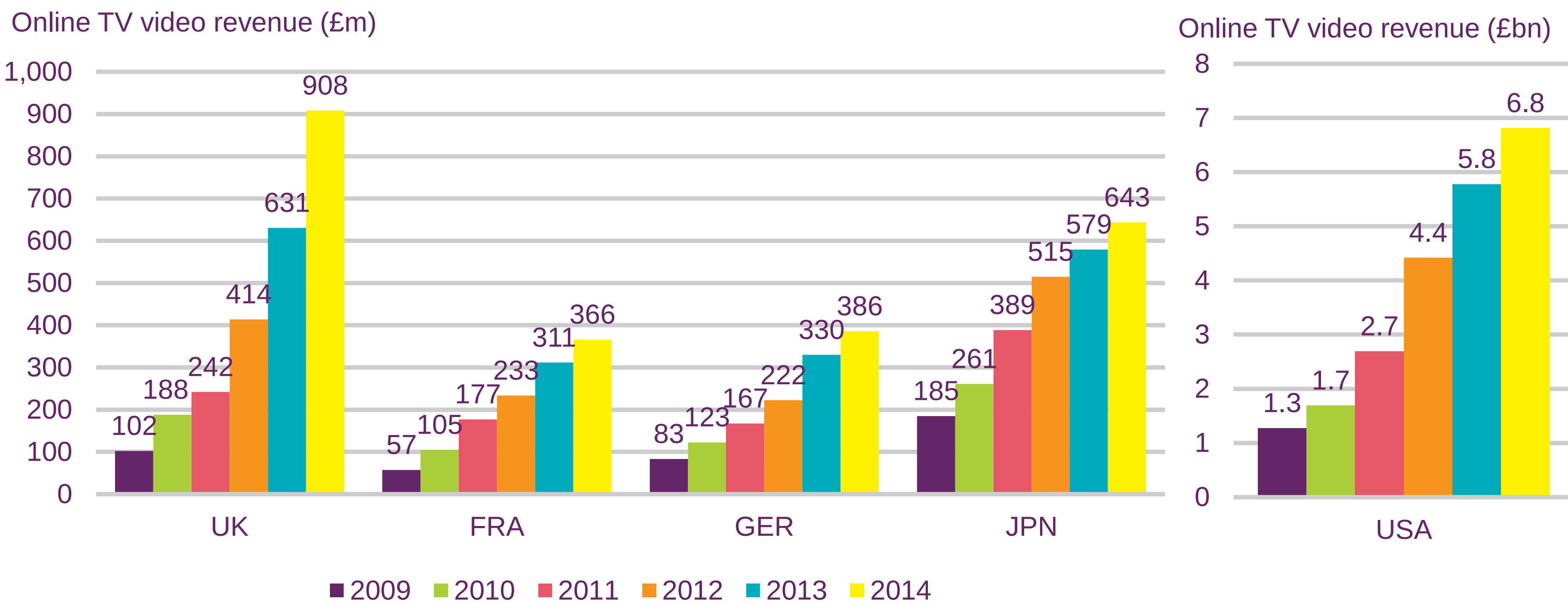
Pay-TV ARPU, by country: 2009-2014



Source: IHS / industry data / Ofcom. Notes: ARPU is average revenue per user, representing the average revenue generated per pay TV subscriber.

Figure 3.20

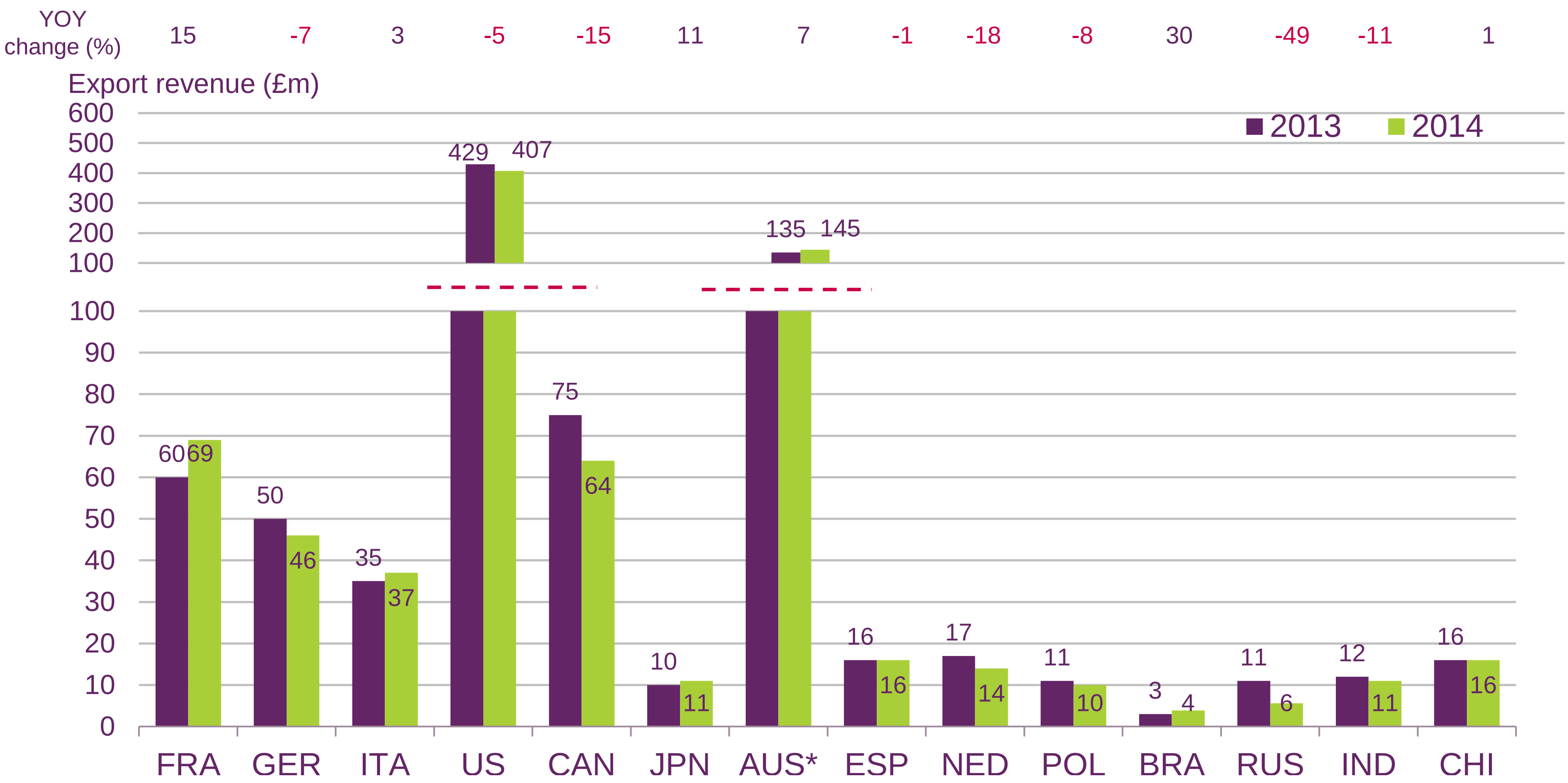
Online TV and video revenue for selected ICMR countries



Source: IHS / industry data / Ofcom. Notes: Different scale used for USA due to larger size. “Online TV and video revenue” refers to either advertising revenue, subscription revenue as well as retail and rental on demand revenue derived from online services delivering TV and video content. Typically, it includes services such as catch-up TV services, Netflix, Xbox Video, Hulu and Hulu Plus, iTunes and YouTube amongst others. All figures expressed in nominal terms.

Figure 3.21

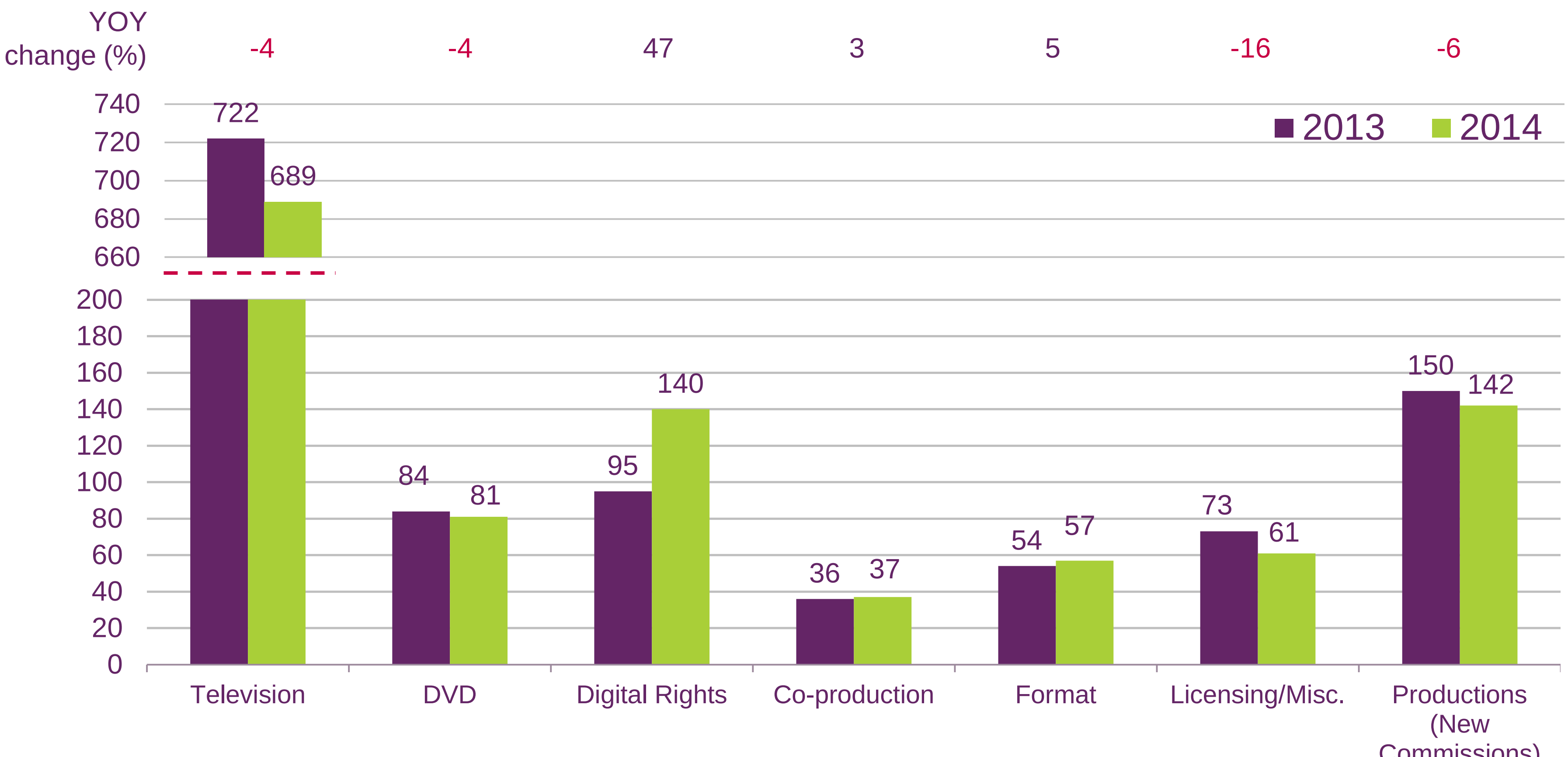
UK television industry export revenues in selected countries: 2013 and 2014



Source: PACT. UK Television Exports Survey 2014/2015. Notes: (1) 24 responses were received in 2014. For comparisons between years to be meaningful, the figures for 2013/2014 have been revised to compare like for like company responses. There was some estimation for incomplete or late surveys. (2) AUS in this section is Australasia and includes Australia, New Zealand, the island of New Guinea and

Figure 3.22

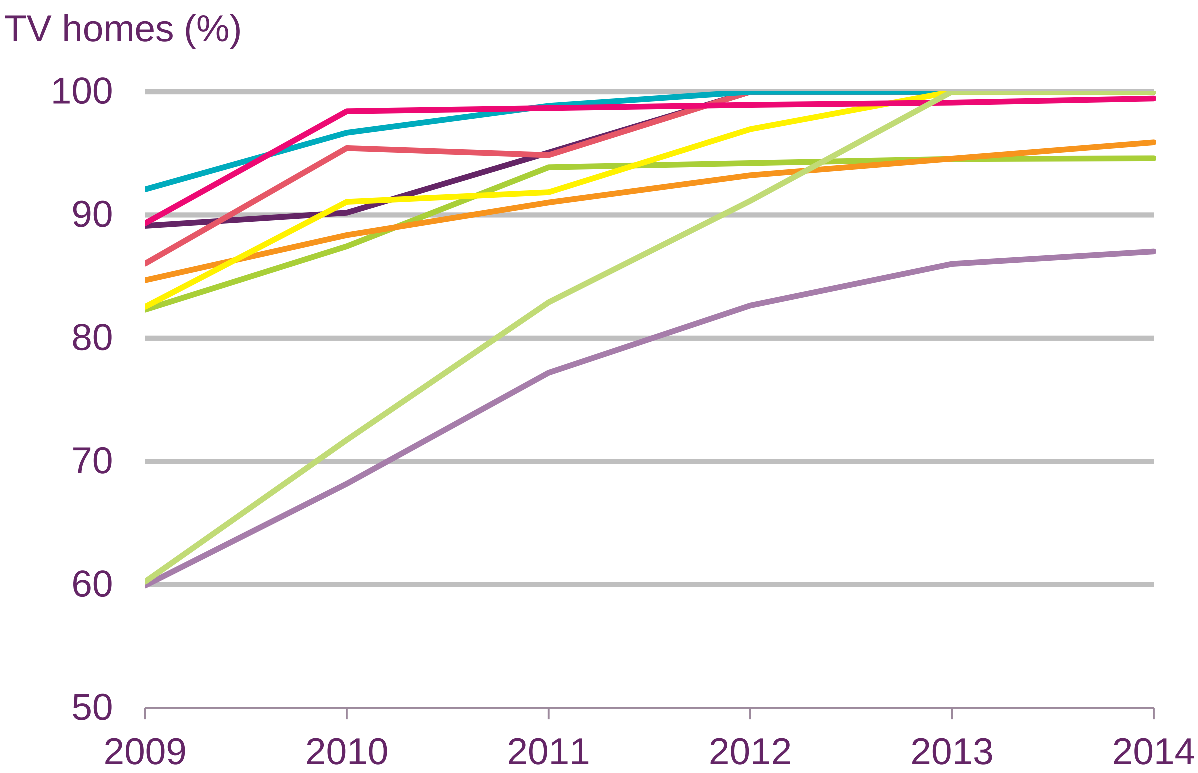
UK television industry export revenues, by type: 2013 and 2014



Source: PACT. UK Television Exports Survey 2014/2015. Notes: (1) 24 responses were received in 2014. For comparisons between years to be meaningful, the figures for 2013/2014 have been revised to compare like for like company responses. There was some estimation for incomplete or late surveys. (2) All figures expressed in nominal terms.

Figure 3.23

Take-up of digital television: top nine comparator countries

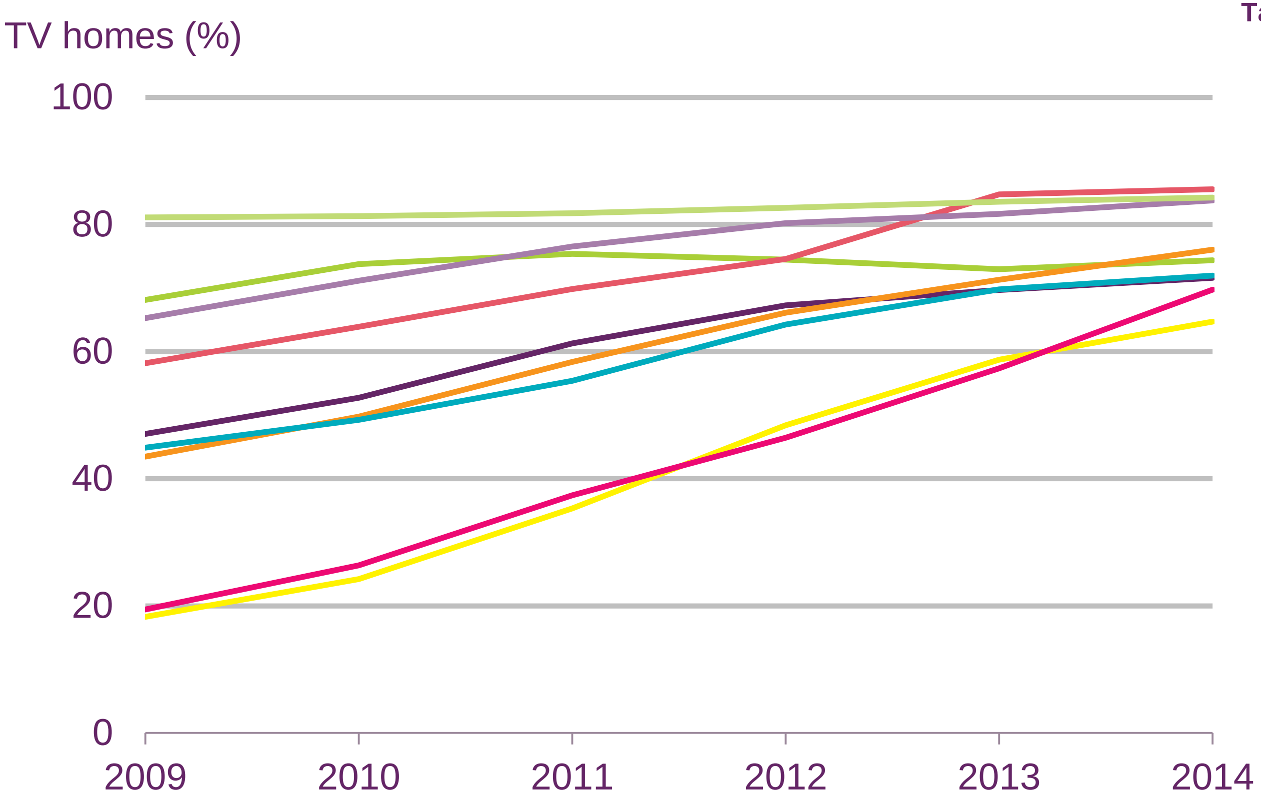


	Take-up 2014	Growth in DTV homes: 1 yr	Growth in DTV homes: 5 yr CAGR
UK	100%	0%	3%
FRA	95%	1%	4%
ITA	100%	0%	4%
USA	96%	2%	3%
JPN	100%	1%	2%
AUS	100%	2%	6%
ESP	99%	1%	3%
NED	87%	2%	9%
SGP	100%	1%	13%

Source: IHS/ industry data/ Ofcom

Figure 3.24

Take-up of digital television: the next nine comparator countries

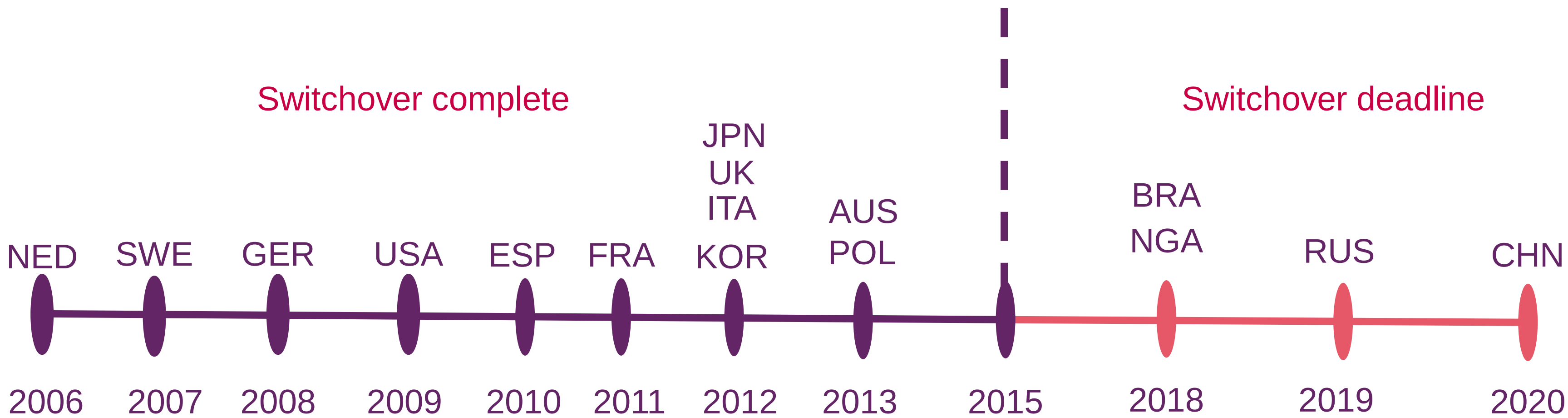


	Take-up 2014	Growth in DTV homes: 1 yr	Growth in DTV homes: 5 yr CAGR
GER	72%	3%	10%
SWE	74%	3%	4%
POL	86%	2%	9%
KOR	76%	8%	14%
BRA	72%	5%	12%
RUS	65%	11%	31%
IND	70%	26%	34%
CHN	84%	6%	7%
NGA	84%	7%	7%

Source: IHS/ industry data/ Ofcom.

Figure 3.25

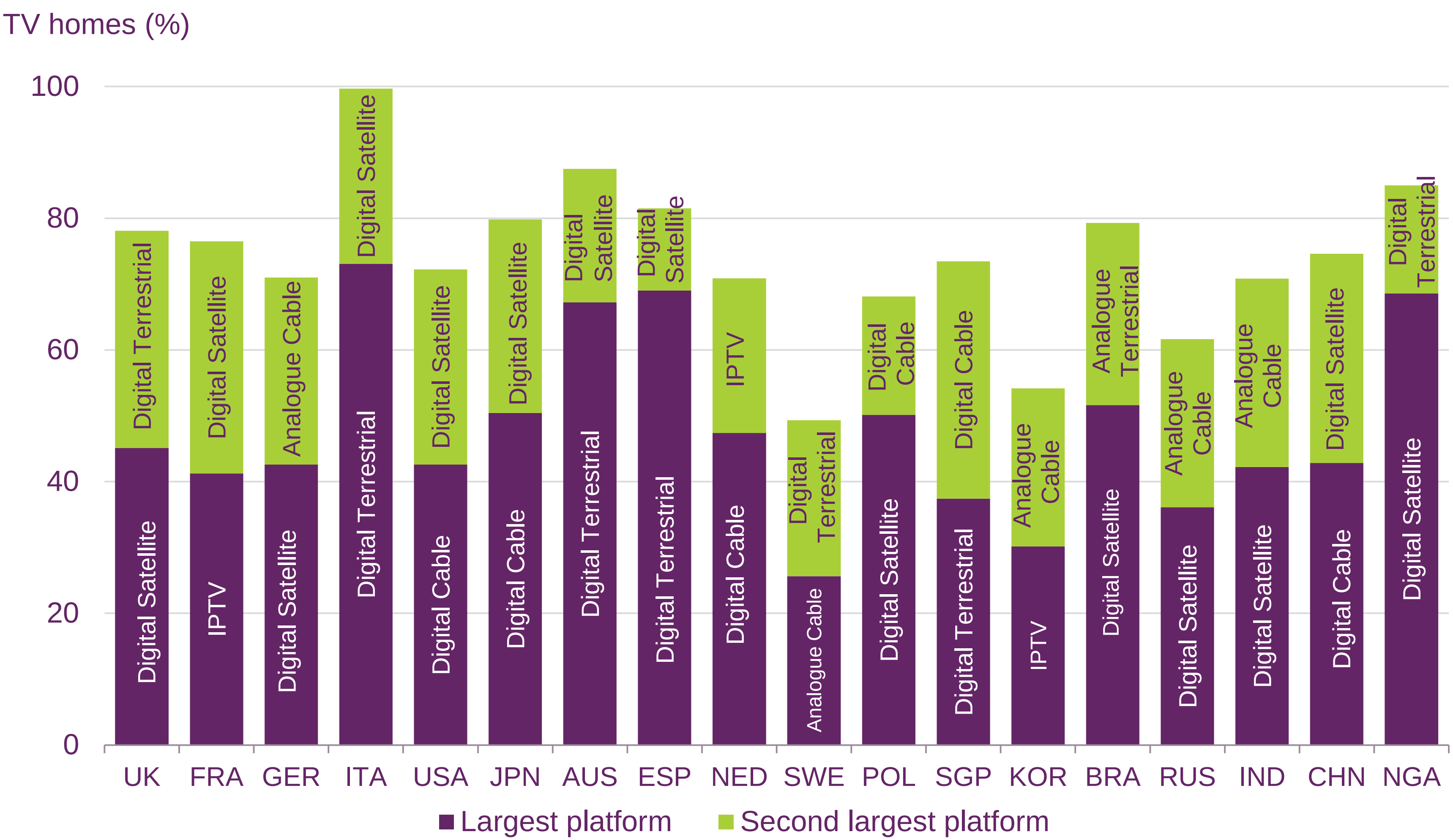
Timeline for digital switchover, by country and date



Source: IHS / industry data / Ofcom

Figure 3.26

Most popular TV platforms: 2014

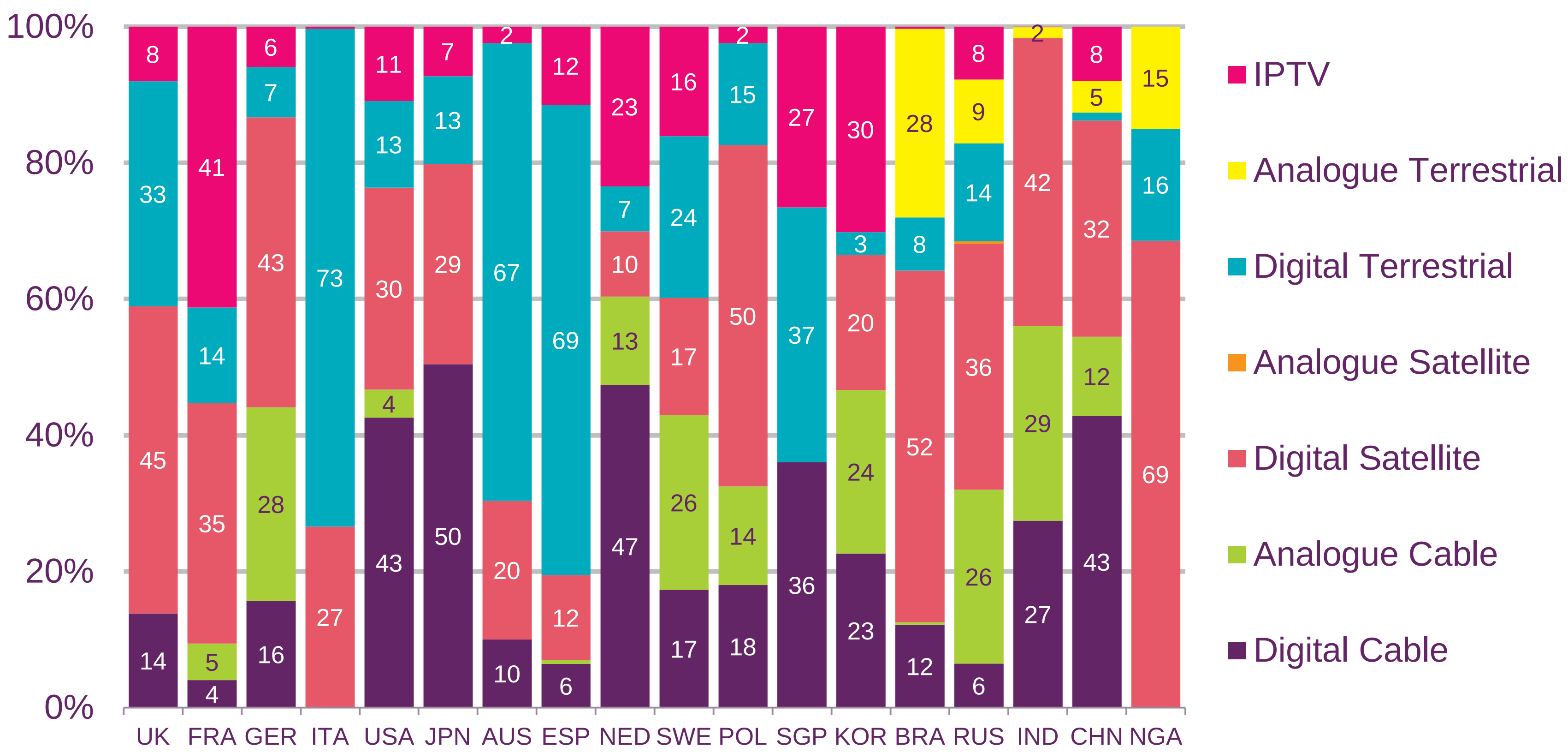


Source: IHS / industry data / Ofcom

Figure 3.27

TV Platform take-up: 2014

TV homes (%)



Source: IHS/Industry Data/Ofcom. Note: Digital terrestrial includes additional paid for services such as Top Up TV. Digital Satellite includes free to air services as well as paid for.

Figure 3.28

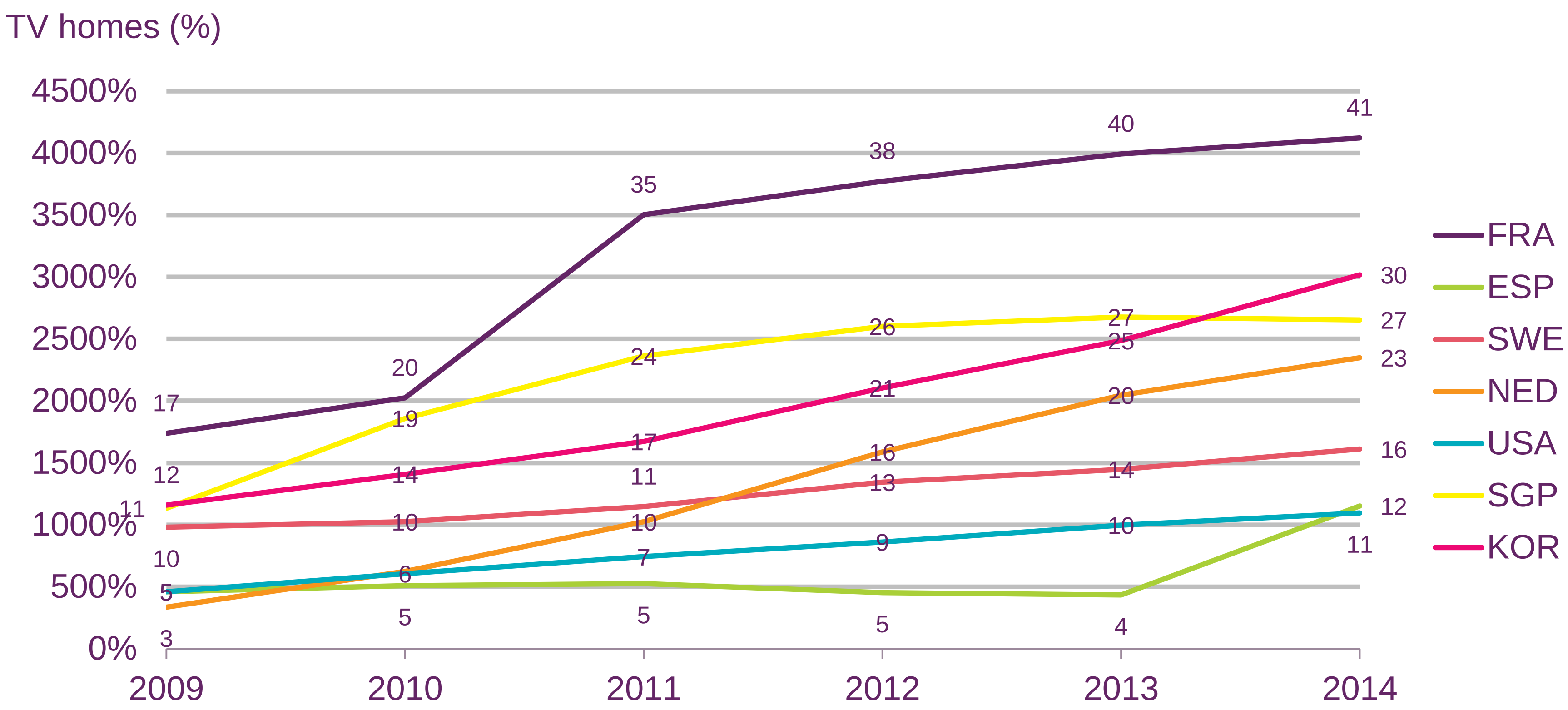
Year-on-year changes in platform take-up, by country and platform: 2013 - 2014

	UK	FRA	GER	ITA	USA	JPN	AUS	ESP	NED	SWE	POL	SGP	KOR	BRA	RUS	IND	CHN	NGA
Digital terrestrial	-4	-2	0	0	0	0	-1	-7	-1	0	2	0	-3	2	0	0	0	4
Digital satellite	2	1	0	0	0	0	0	0	0	0	-2	0	0	-1	3	3	-3	-3
Digital cable	0	0	1	0	1	0	0	0	-1	0	0	0	2	1	2	10	4	0
IPTV	3	1	1	0	1	1	1	7	3	2	0	0	5	0	1	0	1	0
Total digital	0	0	2	0	1	0	0	0	1	1	1	0	5	2	6	12	2	1
Analogue cable	0	0	-2	0	-1	0	0	0	-1	-1	-1	0	-5	0	-2	-11	-4	0
Analogue satellite	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Analogue terrestrial	0	0	0	0	0	0	0	0	0	0	0	0	0	-2	-4	-1	1	-1
Total analogue	0	0	-2	0	-1	0	0	0	-1	-1	-1	0	-5	-2	-6	-12	-2	-1

Source: IHS / industry data / Ofcom. Note: Figures represent percentage point increase across all TV homes.

Figure 3.29

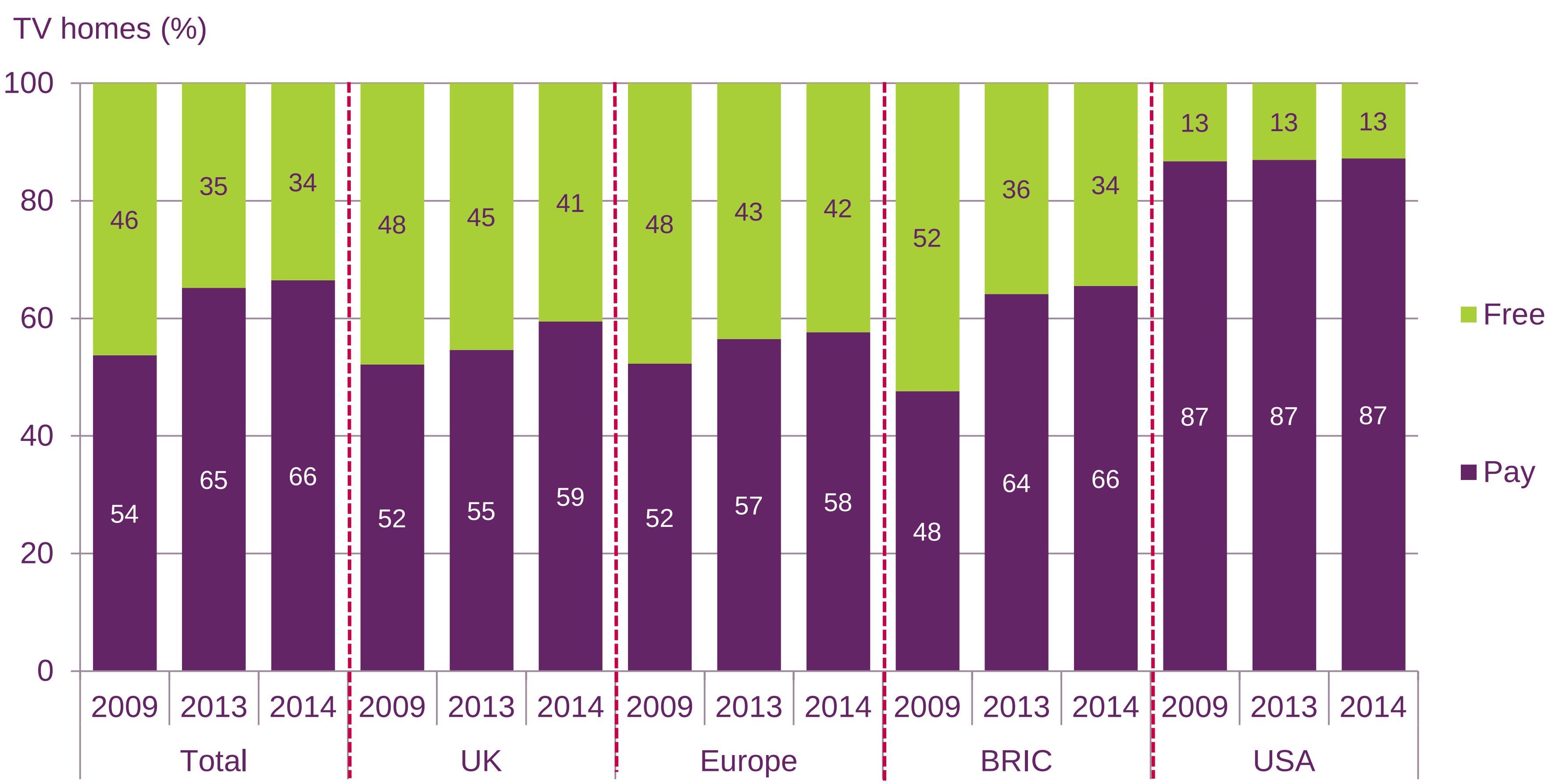
IPTV take-up on main TV sets in countries where take-up was at least 10% in 2014



Source: IHS/ industry data/ Ofcom

Figure 3.30

Take-up of pay-TV among groups of comparator countries



Source: IHS / industry data / Ofcom. Note: ‘Europe’ in this context means those European countries within our comparator set; France, Germany, Italy, Spain, Netherlands, Sweden and Poland. ‘Total’ in this context means the 18 countries in this report’s comparator set.

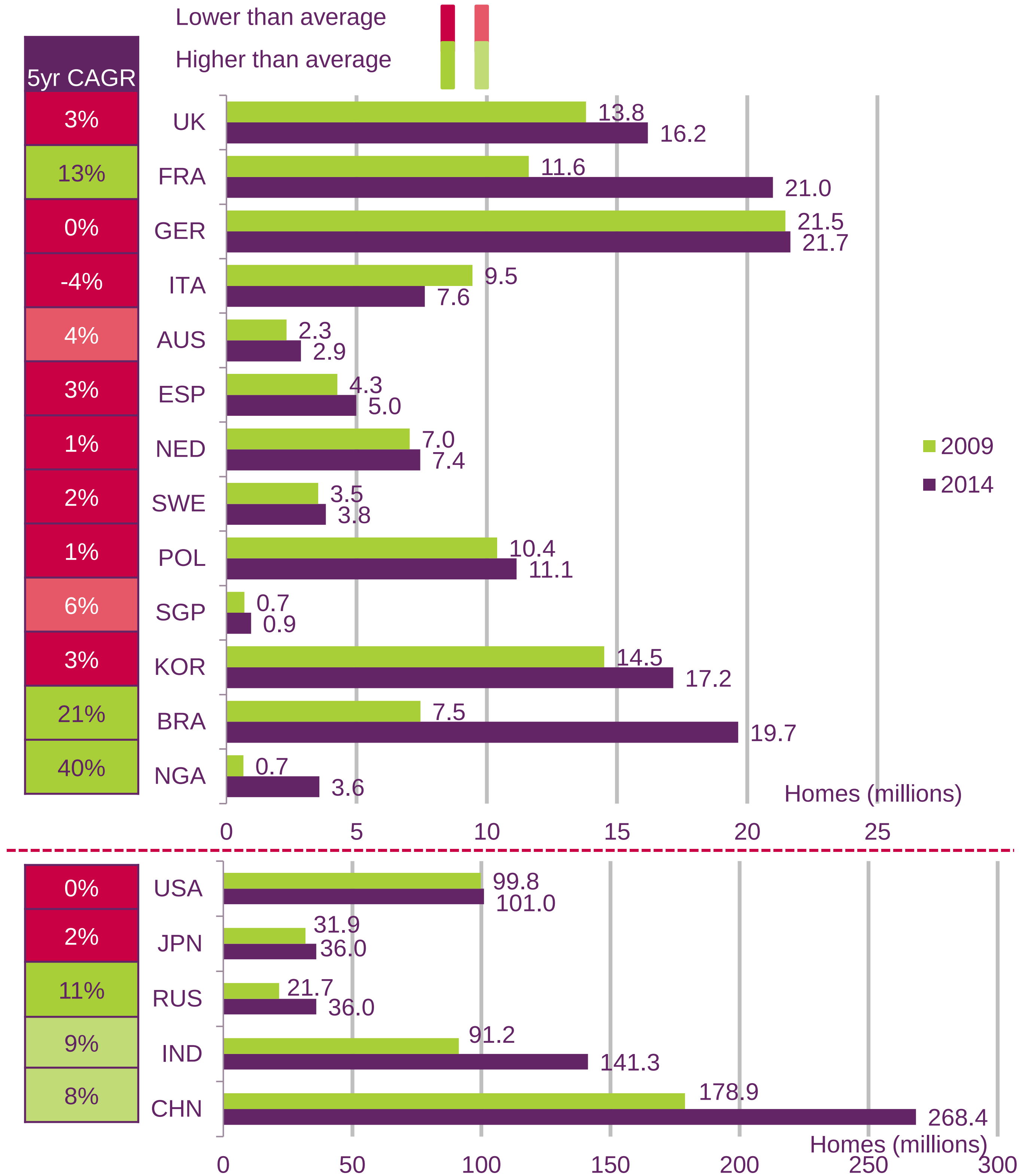
Figure 3.31

Take up of pay and free-to-air television: 2014

Source: IHS/ industry data/ Ofcom.

Figure 3.32

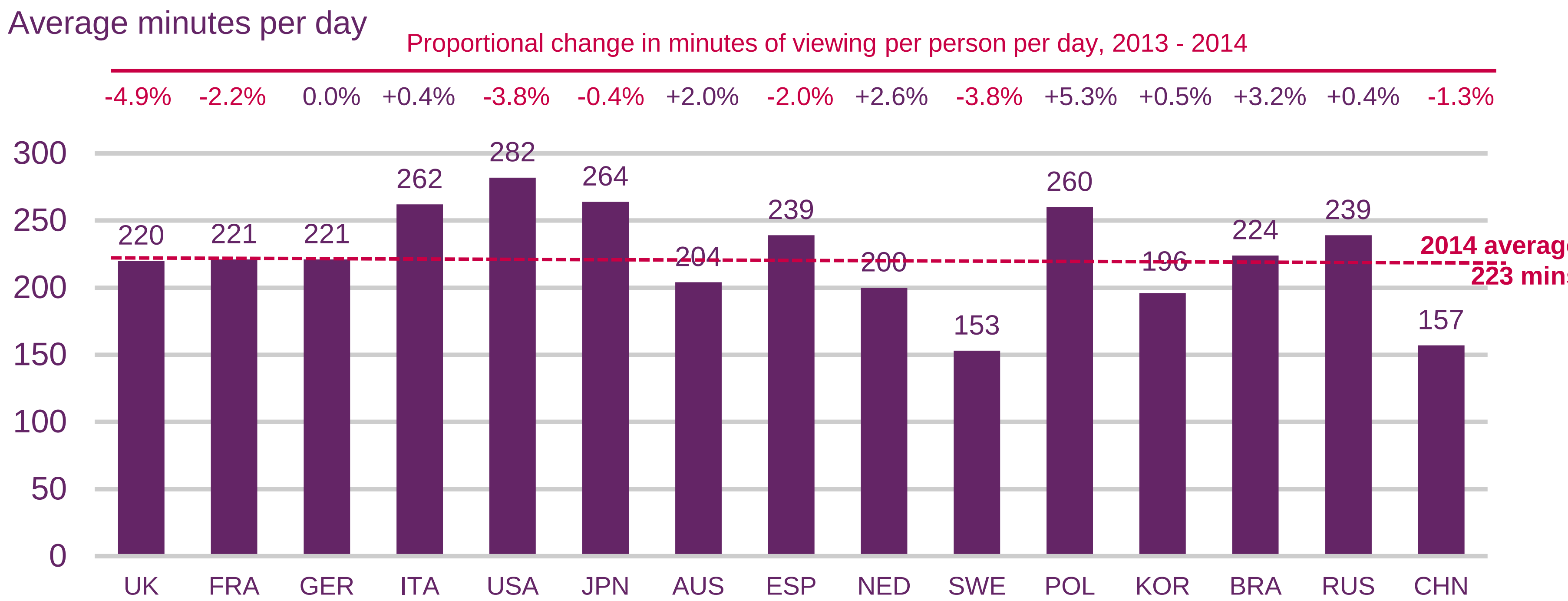
Pay-TV take-up, millions of homes; 2009 and 2014



Source: IHS/ industry data/ Ofcom

Figure 3.33

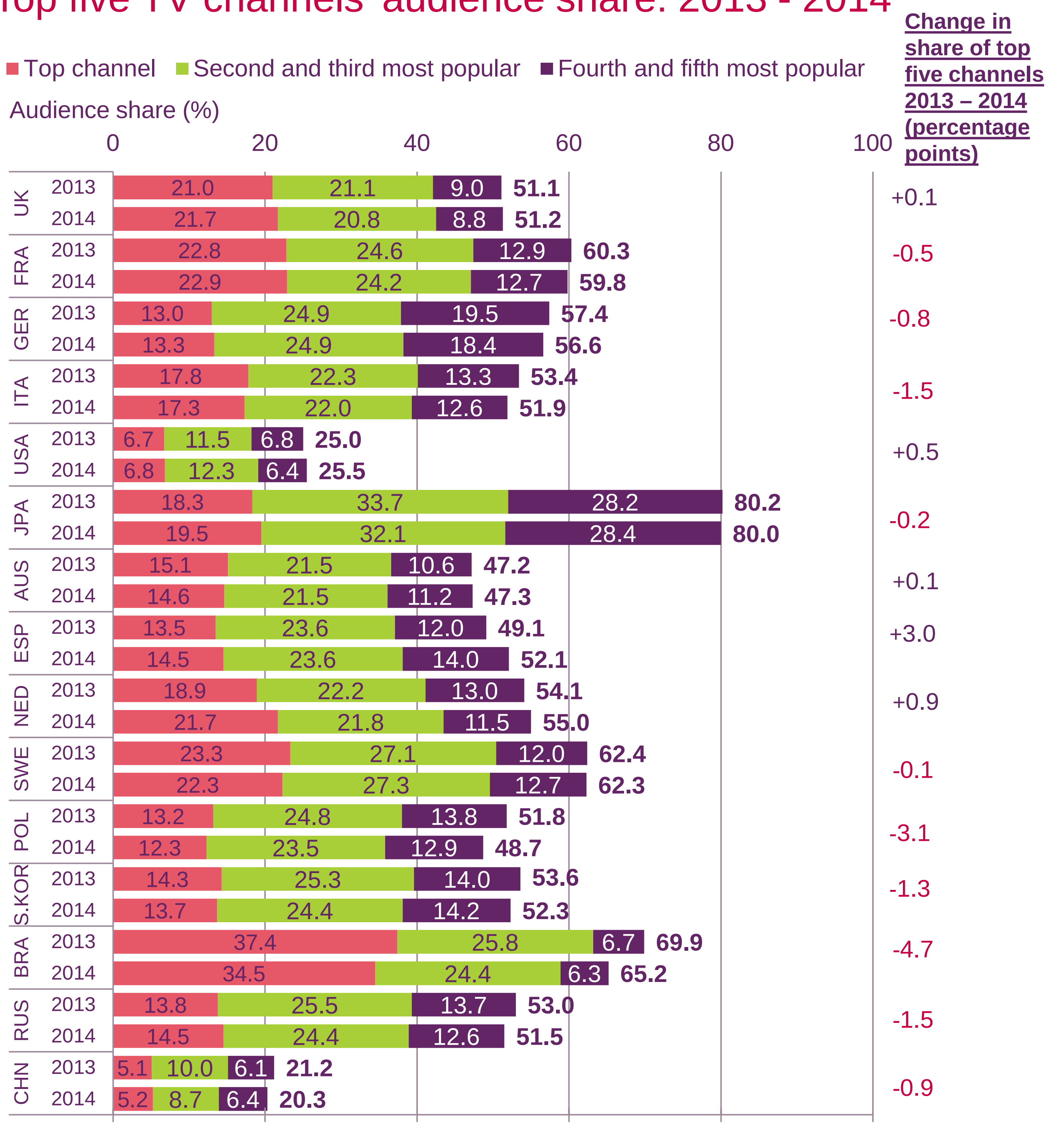
Average minutes of broadcast TV viewing per person per day: 2013 - 2014



Source: Médiamétrie, Eurodata TV Worldwide - One Television Year in the World 2015. Viewing in France relates to France National. Japan data relates to viewing in the Japan Kanto region, considered to be the main TV market in Japan (national data is not available). Viewing in Australia relates to Australia Regional which is calculated on the regions Queensland, Northern NSW, Southern NSW, Victoria & Tasmania and Regional Western Area. Note: the definition of Australia regional changed in 2014 to include Regional Western Australia. 2013 data for Australia Regional in all charts reflects this change. The 2014 ICMR report was based on Australia Regional excluding Regional Western Australia.

Figure 3.34

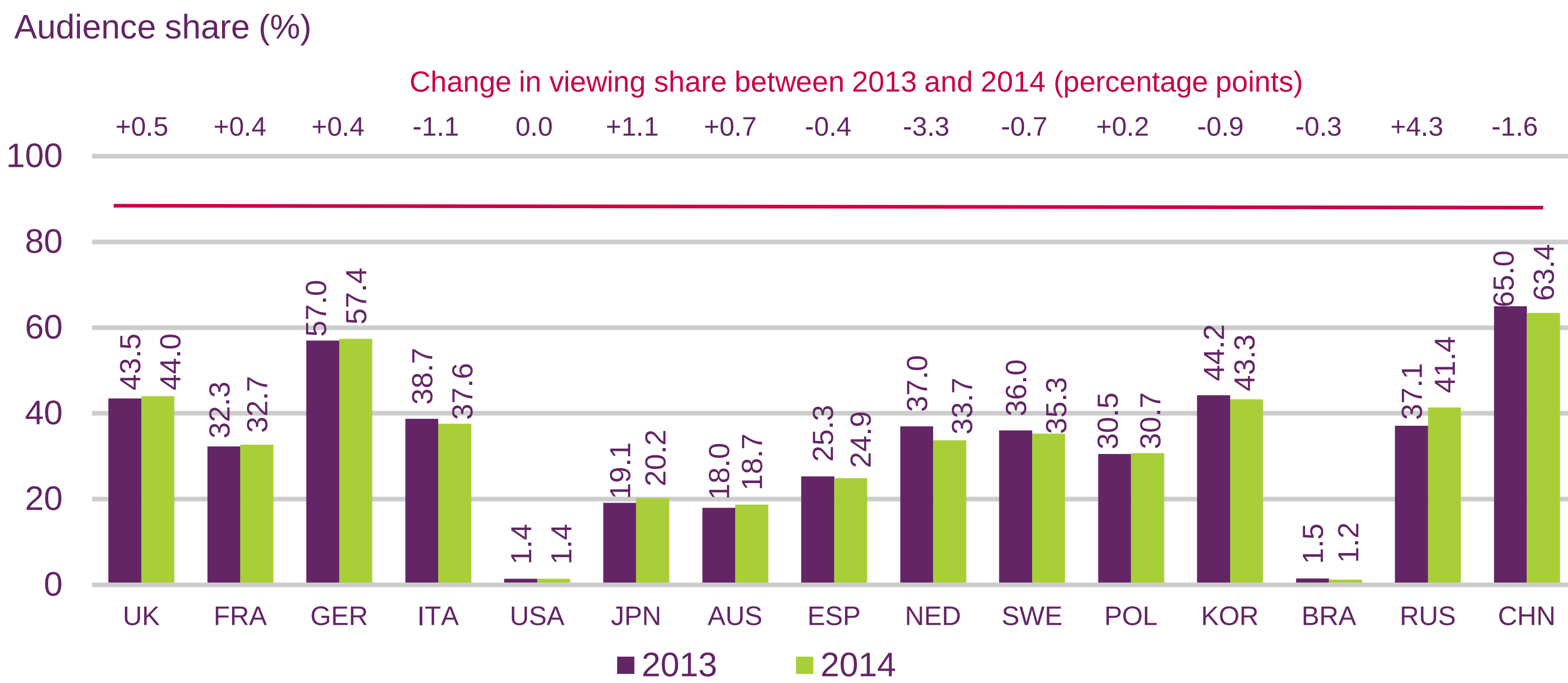
Top five TV channels' audience share: 2013 - 2014



Source: Médiamétrie, Eurodata TV Worldwide - One Television Year in the World 2015. Viewing in France relates to France National. Japan data relates to viewing in the Japan Kanto region, considered to be the main TV market in Japan (national data is not available). Viewing in Australia relates to Australia Regional which is calculated on the regions Queensland, Northern NSW, Southern NSW, Victoria & Tasmania and Regional Western Area. Note: the definition of Australia regional changed in 2014 to include Regional Western Australia. 2013 data for Australia Regional in all charts reflects this change. The 2014 ICMR report was based on Australia Regional excluding Regional Western Australia.

Figure 3.35

Viewing of publicly owned channels

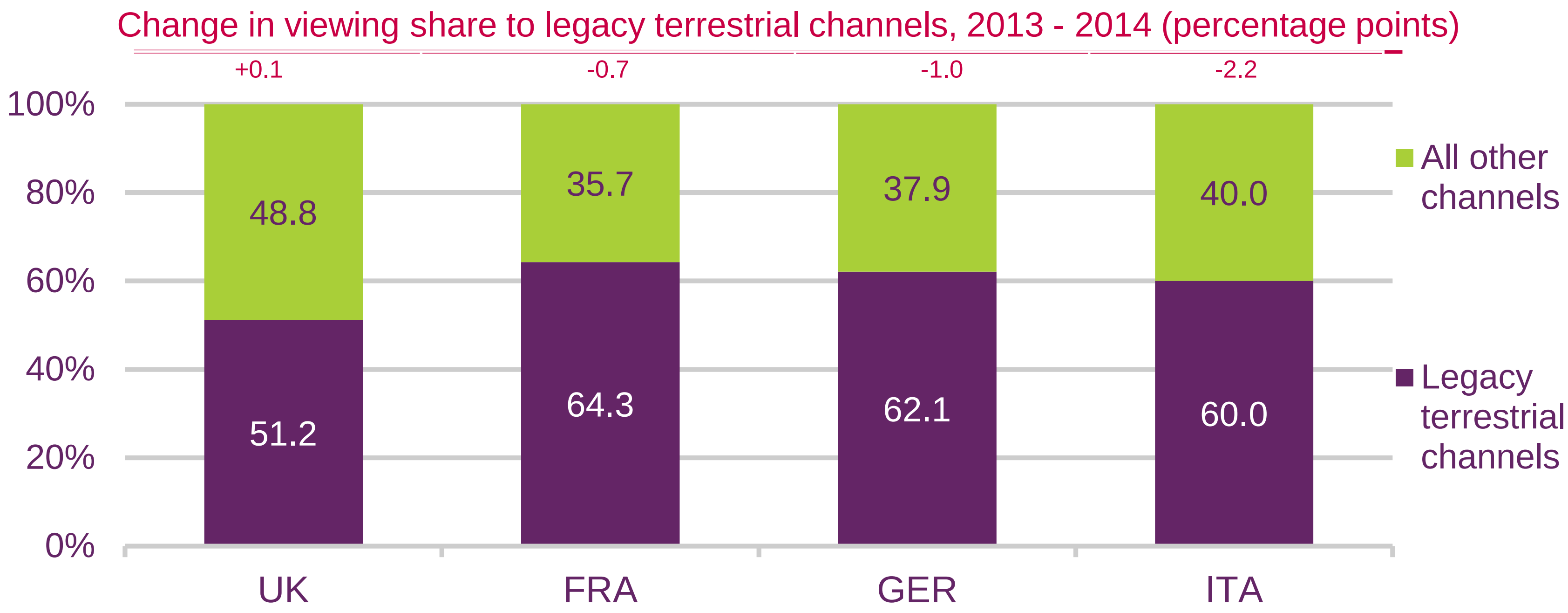


Change in viewing share may not appear to add up with yoy 2013 to 2014 figures due to rounding of decimal places.
Source: Médiamétrie, Eurodata TV Worldwide - One Television Year in the World 2015. Uses the 'Status' flag attributed to each channel by country which relates to state ownership. Includes *Domestic public*, *Foreign public*, *Public* and *Mixed*. *Domestic public* refers to channels that broadcast locally and are state-owned. *Foreign public* refers to international public channels. *Public* refers to channels that are difficult to label between *'Domestic public'* and *'Foreign public',* such as BBC America. *Mixed* refers to channels with a hybrid status (mix of public and private funding). Viewing in France relates to France National. Japan data relates to viewing in the Japan Kanto region, considered to be the main TV market in Japan (national data is not available). Viewing in Australia relates to Australia Regional which is calculated on the regions Queensland, Northern NSW, Southern NSW, Victoria & Tasmania and Regional Western Area. Note: the definition of Australia regional changed in 2014 to include Regional Western Australia. 2013 data for Australia Regional in all charts reflects this change. The 2014 ICMR report was based on Australia Regional excluding Regional Western Australia.

Figure 3.36

Legacy terrestrial versus all other channels share

Audience share (%)



Source: Médiamétrie, Eurodata TV Worldwide - One Television Year in the World 2015. Legacy terrestrial channels are based on MediaMetrie's definition of channels considered to be 'historical leaders' .
UK= BBC One, BBC Two, ITV, Channel 4, Channel 5 (inc HD variants, exc +1s)
Germany = ARD, ARD 3, ZDF, RTL, Sat1, Pro7
France = TF1, France 2, France 3, Canal+, France 5 24/24H, Arte 24/24H, M6
Italy = Rai Uno, Rai Due, Rai Tre, Canale 5, Italia 1, Rete 4, La 7