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Origin and availability of television services in the European Union

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Key Trends

- The number of TV channels established in Europe has increased notably, but nearly half of the growth can be attributed to the launch of HD channels, generally simulcasts of existing channels.
- The growth in channels that are available in a country is both driven by more national channels and greater access to foreign channels.
- Among these foreign channels, a rapidly increasing share was specifically targeting the country.
- The majority of TV channels available on average in a given country were foreign channels and this share remained stable over time.
- Television consumption in the EU decreased since 2012. This trend is even more pronounced among younger people.
- The gap between television consumption of the overall population and younger people continued to widen. On average, the younger population watched half as much television as the total population.

Linear Audiovisual Media Services

The purpose of this note is to provide an overall background of the linear media services landscape in the 28 EU countries by focusing on a) the country of origin of services, b) the availability of services and c) the television viewing time of the overall and younger population.

1.1 Methodological overview

This section provides a methodological overview of how the data in this note was collected, measured and categorised. The scope of data includes all 28 EU member states.

Sources

All data concerning television channels established or available in the 28 EU countries are provided by the European Audiovisual Observatory and its database MAVISE. MAVISE is a database on TV and on-demand audiovisual services and companies in Europe. Data on television viewing times are provided by Eurodata TV Worldwide.

Time series and data comparison

The data presented in this note covers the years 2009-2013. For reasons of simplicity, some tables draw a direct comparison between data of 2009 and 2013 without including the years in between. With regard to television viewing time, the times series includes an additional year to cover the time period from 2009-2014.

Linear audiovisual media services established and available in a country

Television channels that are **established in a country** include those that hold a broadcasting license from a national regulatory authority. In addition, other channels are included in the data collection that may not hold a license but are clearly of a specific national origin according to company address, Internet domain name etc.

Television channels that are **available in a country** comprise those that are available on the major distribution platforms (e.g. DTT, cable, satellite, IPTV) as advertised by the channel line-ups on the websites of platform operators.

Language versions of channels

It should be noted that different language versions of brand television channels such as National Geographic and Fox are counted as separate channels in the MAVISE database.

HD channels

Please also note that the genre HD includes channels that only exist in HD as well as HD simulcasts of channels in standard definition (SD). Hence, the great majority of channels in the genre HD have in reality a different genre. The rationale for including HD simulcasts of channels in the genre HD was to be able to track the overall development of HD channels.

Figures on local channels

It should be noted that the census of local channels is complicated and in some cases (e.g. Italy, Spain) figures are based on estimates as no official lists exist. Hence, these figures serve the purpose of a general overview but should be handled with caution.

Foreign channels

Foreign channels are those that do not hold a license from the national regulatory authority of a given country.

Foreign channels targeting a country

Foreign channels that specifically target a country form a sub-category of foreign channels. The indicator used in the MAVISE database to signify that a channel is specifically targeting another country is when the service broadcasts in the national language of the country.

Television viewing time

The data currency of television viewing times is based on one or more of the following units: a) live transmission of a programme, b) viewing on same day as live (VOSDAL), c) viewing on a TV screen most commonly within 7 days after the live broadcast using the recording or live playback functions of digital video recorders (DVRs) (+3, +6, +7 days).

1.2 Changes in the number of linear audiovisual media services established in the 28 EU member states

Technological advancements such as the digitisation of television and the introduction of high definition on television screens, plus the ongoing fragmentation of the audiovisual market to cater for individual tastes have resulted in a dramatic increase in the number of television channels over the past years.

The following section provides an overview of the linear television channels established in the 28 EU member states. It provides an overview of pan-European trends as well as an analysis of national markets. This includes an analysis of the different genres of television channels established in EU territories, a short note on local channels and a synopsis of television channels established in the EU that target other countries.

Pan-European trends

The key pan-European trends are as follows:

- **42% more TV channels established in the EU in 2013 than 5 years earlier:** The total number of channels established in the EU grew by 42% from 3615 in 2009 to 5141 in 2013 and this excludes local channels. This represented a total net gain of 1526 channels in five years.
- **Around 45% of the channel increase due to launch of HD channels:** HD channels were the main driver of channel growth in the EU: 45% of the net increase of channels (total 1526) was due to the launch of HD channels (total 838). For more information on genres please see section 1.2.1.
- **UK, France, Germany and Italy among countries with highest number of TV channels:** The markets with the highest number of established channels in 2013 were the UK (total 1523), France (total 454), Germany (total 428) and Italy (total 427). Other countries with more than 100 channels established in their territories included Sweden (total 258), Spain (total 256), the Netherlands (total 221), Romania (total 205), the Czech Republic (total 201), Bulgaria (total 128) and Poland (total 117).
- **Vast majority of EU countries registered growth in total number of TV channels:** The vast majority of EU countries registered an increase in the total number of established channels. The few exceptions to this rule were Austria whose number of channels decreased slightly by -5% over the five year period due to a migration of adult channels to other countries. In other countries such as the German-speaking Community of Belgium and Cyprus the number of linear television channels was the same in 2013 as it was five years earlier.
- **UK, Germany, France and Czech Republic registered highest net growth in numbers of TV channels:** The biggest increase of net total numbers of channels in the five year period were registered in the UK (+448), Germany (+179), France (+140) and the Czech Republic (+107). Other countries with significant net growth in the number of channels were Romania (+81), Sweden (+70), the Netherlands (+61) and Bulgaria (+56).
- **Highest growth rate in number of channels in Croatia, the Czech Republic and Latvia:** The countries with the largest growth rates (>100%) in the number of channels established in their territories were Croatia (164%), the Czech Republic (114%) and Latvia (112%). In

addition, countries with channel growth rates of more than 50% included Bulgaria (78%), Finland (74%), Denmark (73%), Germany (72%), Greece (69%), Luxembourg (68%), Slovakia (67%), Romania (65%), Ireland (64%), Poland (63%), Malta (61%) and Slovenia (57%).

The following table examines the changes in the number of linear television channels established in the 28 EU member states in the period from 2009 to 2013.

Table 1: Number of linear audiovisual media services by country of establishment + total 2013 vs. 2009[1]

Country	2009	2010	2011	2012	2013	2013 vs. 2009
AT	83	65	66	72	79	-5%
BE (CFB)	29	30	28	31	32	10%
BE (DSG)	2	2	2	2	2	0%
BE (VLG)	56	65	64	72	60	7%
BE (1)	46	46	46	47	47	2%
BG	72	84	90	111	128	78%
CY	34	35	34	37	34	0%
CZ	94	107	123	146	201	114%
DE	249	263	280	374	428	72%
DK	33	31	27	34	57	73%
EE	11	10	13	13	13	18%
ES	231	245	249	255	256	11%
FI	34	37	52	55	59	74%
FR	314	376	409	476	454	45%
GB	1075	1184	1317	1418	1523	42%
GR	45	59	58	64	76	69%
HR	22	25	42	49	58	164%
HU	35	44	47	45	50	43%
IE	11	10	16	16	18	64%
IT	385	470	485	450	427	11%
LT	14	15	17	18	20	43%
LU	38	46	48	52	64	68%
LV	17	33	33	36	36	112%
MT	28	32	32	45	45	61%
NL	160	206	218	250	221	38%
PL	72	69	78	104	117	63%
PT	61	78	88	90	89	46%
RO	124	140	155	181	205	65%
SE	188	169	176	211	258	37%
SI	28	43	44	47	44	57%
SK	24	30	31	38	40	67%
EUR 28	**3615**	**4049**	**4368**	**4839**	**5141**	**42%**

Source: European Audiovisual Observatory

[1] Windows and local channels not included.

1.2.1 Different genres of television channels established in the EU

The following sub-section provides an analysis of the different genres of channels established in the 28 EU member states. The first part summarises the most important pan-European trends. The sub-section continues with a detailed analysis of genres on a country by country basis.

The figures presented here do not include local channels. Please also note that the genre HD includes channels that only exist in HD as well as HD simulcasts of channels in standard definition (SD). Hence, the great majority of channels in the genre HD have in reality a different genre (please see section 1.1).

Pan-European trends

- **Almost half of all TV channels established in the EU in 2013 were HD channels (16%), sport (11%), entertainment (9%), film (7%) and children's channels (6%):** The top five genres of channels established in the EU 28 in 2013 included HD (total 838), sport (total 561), entertainment (total 442), film (total 357) and children's channels (total 304). The aggregated total (e.g. 2502) of those top 5 genres was the equivalent of 49% of all television channels established in the 28 EU member states.

- **HD channels were main driver (45%) of channel growth in the EU:** HD channels were the main driver of channel growth in the EU: 45% of the net increase of channels (total 1526) was due to the launch of HD channels (total 838). Other genres with significant net channel growth were sport (+168) and entertainment channels (+119). In addition, the following genres also had a substantial net growth: documentary (+98), fiction (+96), children (+72), lifestyle (+61) and music (+54).

- **HD, fiction, documentary and lifestyle channels with highest growth rates (over 50%):** The genre HD registered by far the highest growth rate (478%) with almost 5 times as many channels in high definition established in the EU in 2013 than there were five years earlier; this is followed by the genre fiction with an increase of 73% from 2009 to 2013; in third place are documentary channels accounting for 55% more channels in that genre than there were in 2009; the genre lifestyle comes in fourth place with an increase of 52% of channels in five years' time.

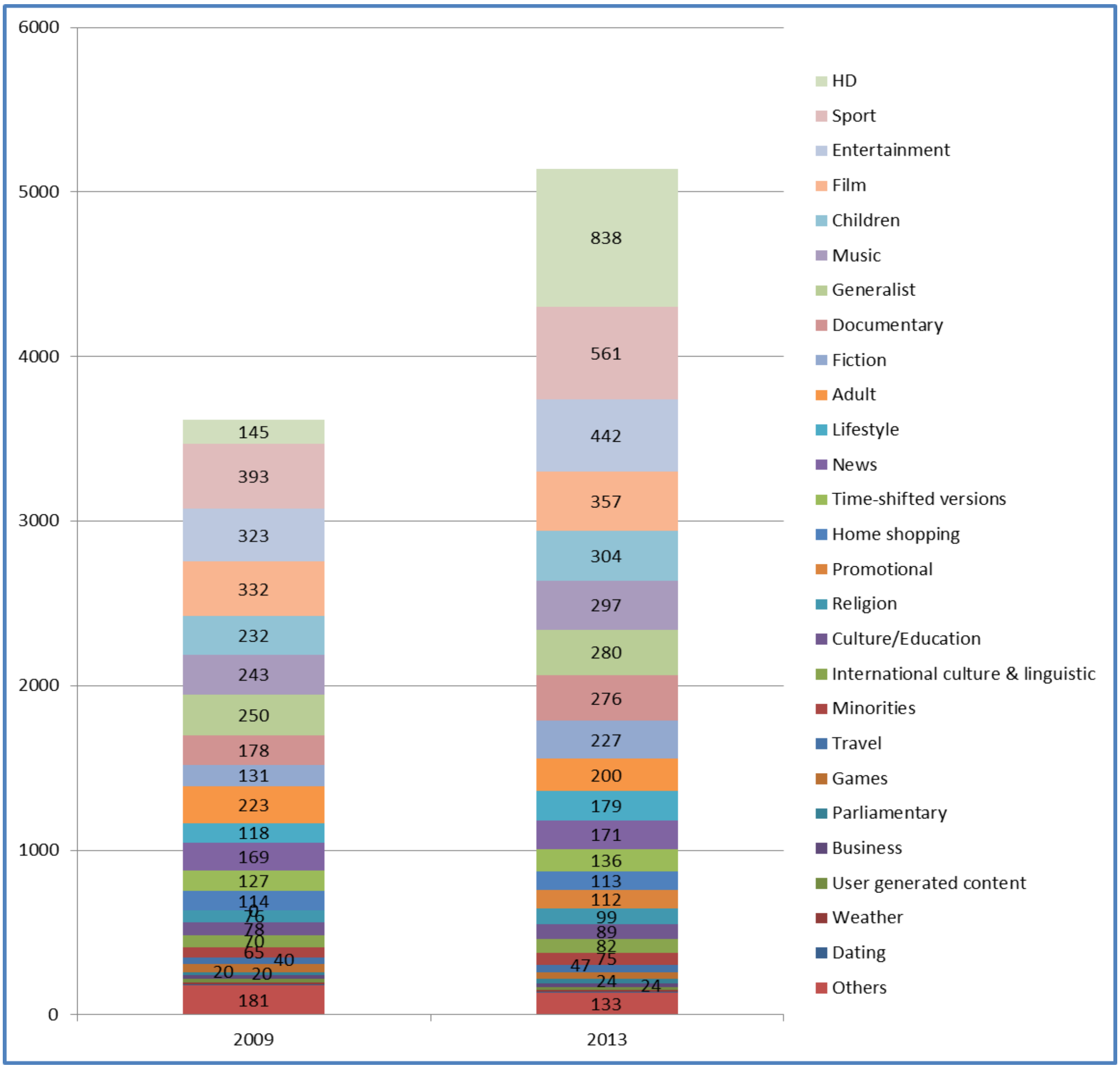
The table below details the total number of channels by genre in the EU in 2013 and compares them to the figures in 2009. In addition, the figure that follows summarises the different genres of linear television channels established in the 28 EU member states in 2013.

Table 2: Number of linear audiovisual media services established in the EU by genre and by country in 2009 and 2013 + total 2013 vs. 2009

Genre	2009	2013	2013 vs. 2009
Adult	223	200	-10%
Business	20	24	20%
Children	232	304	31%
Film	332	357	8%
Culture/Education	78	89	14%
Dating	4	6	50%
Documentary	178	276	55%
Entertainment	323	442	37%
Fiction	131	227	73%
Games	48	39	-19%
Generalist	250	280	12%
HD	145	838	478%
Home shopping	114	113	-1%
News	169	171	1%
International culture & linguistic	70	82	17%
Lifestyle	118	179	52%
Minorities	65	75	15%
Music	243	297	22%
Parliamentary	20	24	20%
Promotional	N/A	112	N/A
Religion	76	99	30%
Sport	393	561	43%
Travel	40	47	18%
Time-shifted versions	127	136	7%
User generated content	24	16	-33%
Weather	11	14	27%
Others	181	133	-40%
Total (no local no windows)	**3615**	**5141**	**42%**

Source: European Audiovisual Observatory

Figure 1: Number of linear audiovisual media services established in the EU 28 by genre in 2009 and 2013



Source: European Audiovisual Observatory

National analysis

The following sub-section summarises the main findings of an analysis of genres of linear television channels established in the EU by country in alphabetical order (ISO code). The analysis does not include local channels.

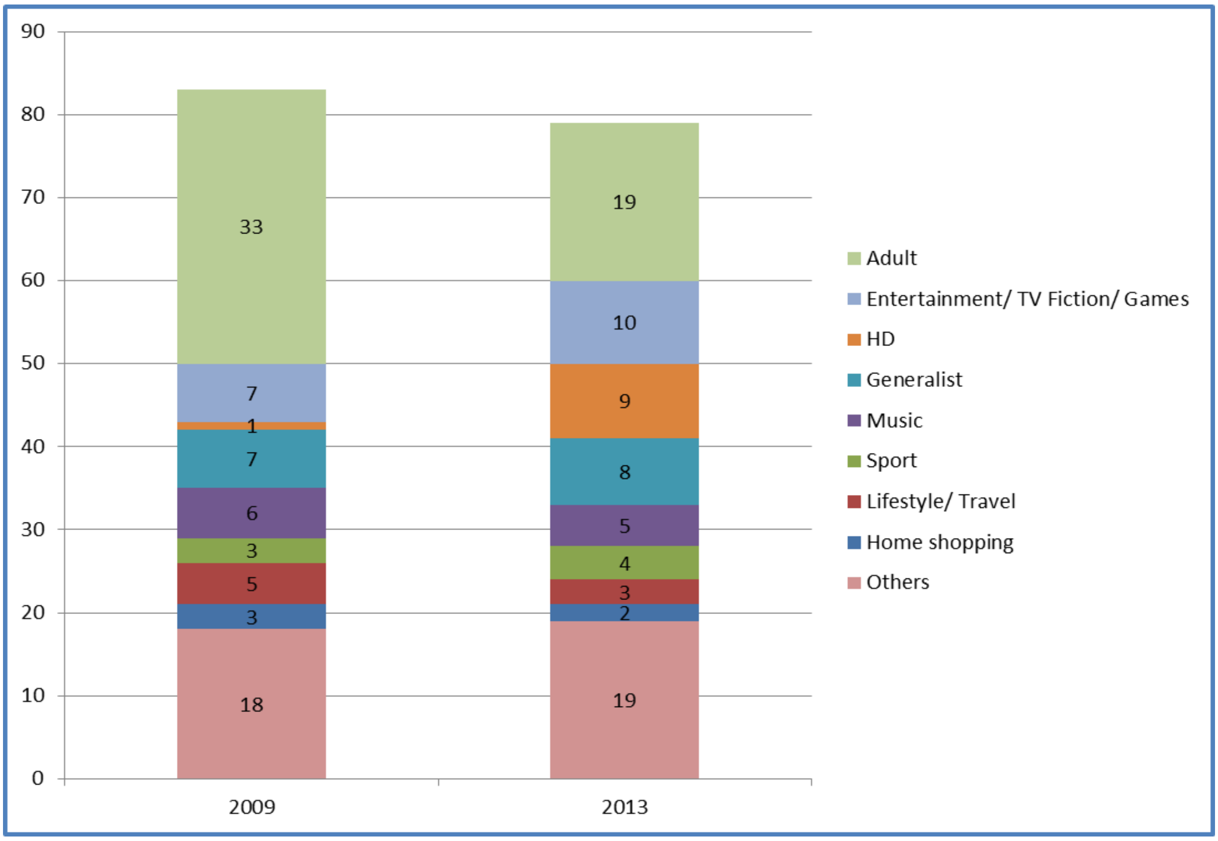
AT – Austria

- **Fewer channels in Austria over 5 year period due to migration of adult channels:** As an exception to the rule, Austria is the only country in the EU where the total number of channels decreased in the 5 year period from 83 down to 79. This is due to the number of adult channels that moved their licensing to another/other countries. Yet, the most prominent genre of channels established in Austria remained adult channels.

- **Adult, entertainment, HD, generalist and music channels among top 5 genres:** Adult (total 19), entertainment/ TV fiction/ games (total 10), HD (total 9), generalist (total 8) and music channels (total 5) were the top 5 genres in Austria in the period from 2009 to 2013.

- **Significant increases in HD, entertainment, sport and generalist channels:** HD channels (increase from 1 to 9 channels), entertainment/ TV fiction/ games (+3), sport (+1) and generalist channels (+1) registered increases over the five year period; major drop in number of adult (-14), lifestyle/travel (-2), home shopping (-1) and music channels (-1).

Figure 2: Number of linear audiovisual media services established in Austria by genre in 2009 and 2013

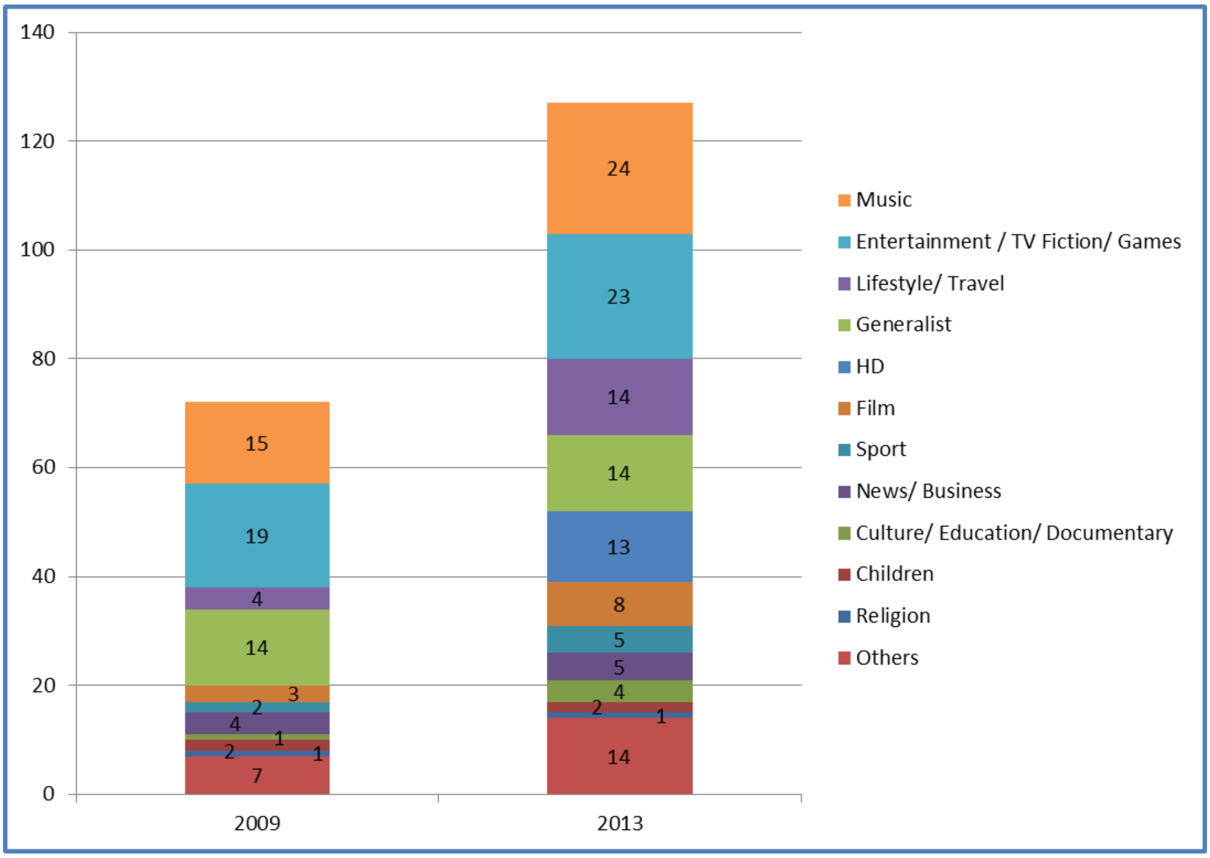


Source: European Audiovisual Observatory

BG – Bulgaria

- **Increase of total number of channels by almost 80%:** The total number of channels established in Bulgaria increased by 78% in the five year period from 72 to 128 channels.
- **Music, entertainment, generalist, lifestyle and HD channels among top 5 genres:** Music (total 24), entertainment/ TV fiction/ games (total 23), generalist (total 14) lifestyle/ travel (total 14) and HD channels (total 13) were the top 5 genres in Bulgaria in the period from 2009 to 2013.
- **Substantial growth in HD, culture, lifestyle, film and sports channels:** With the exception of generalist, children and religious channels which remained stable all other genres of channels grew in the five year period. In 2013, there were 13 HD channels established in the country that did not exist in 2009. The genres lifestyle/ travel (increase from 4 to 14) and music (increase from 15 to 24) also registered significant growth rates. In addition, there were more film (+5), entertainment/ TV fiction/ games (+4), culture/ education/ documentary (+3), sport (+3) and news/ business channels (+1) than before whereas the number of channels in the genres generalist, children and religion remained the same.

Figure 3: Number of linear audiovisual media services established in Bulgaria by genre in 2009 and 2013



Source: European Audiovisual Observatory

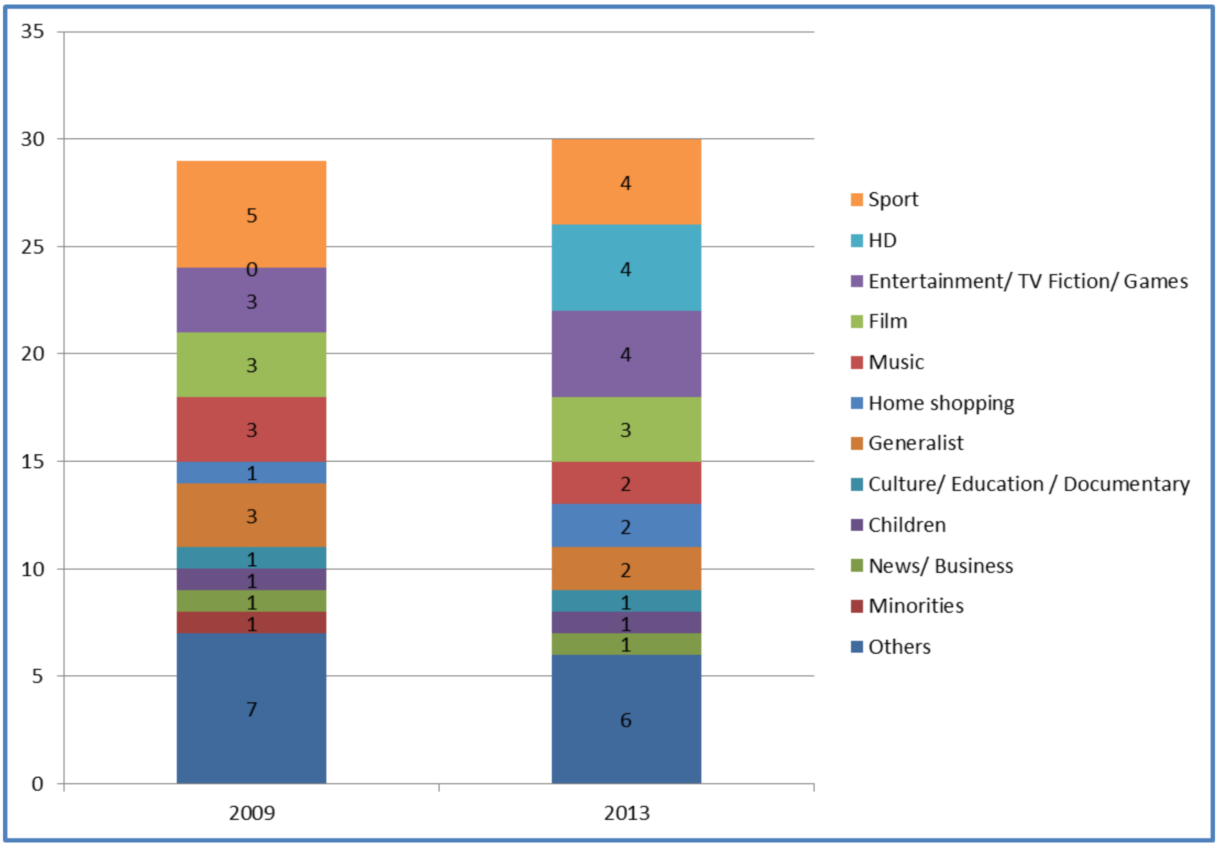
BE – Belgium

The German-speaking Community of Belgium has two channels established under its jurisdiction – the generalist channel BRF TV and Offener Kanal Ostbelgien of the Belgischer Rundfunk (BRF). Belgium is also home to the 46 language versions of EbS Europe by Satellite.

French Community of Belgium

- **Total number of channels established in the French Community of Belgium remained relatively stable:** The total number of channels remained relatively stable, increasing slightly by 10% from 29 channels in 2009 to 32 services in 2013.
- **Entertainment, HD, sport, film and generalist channels among top 5 genres:** The most important genres in the French Community of Belgium in 2013 were entertainment/ TV fiction/ games (total 4), HD (total 4), sport (total 4), film (total 3) and generalist channels (total 2).
- **Moderate growth in genres HD, home shopping and entertainment:** With the exception of the three genres HD (+4), home shopping (+1) and entertainment/ TV fiction/ games (+1) which slightly increased their numbers of channels the majority of genres remained unchanged over the five year period (e.g. film, news/ business, children, culture/ education/ documentary) or registered fewer numbers of channels (e.g. sport, generalist, music and minorities channels; -1 each).

Figure 4: Number of linear audiovisual media services established in the French Community of Belgium by genre in 2009 and 2013

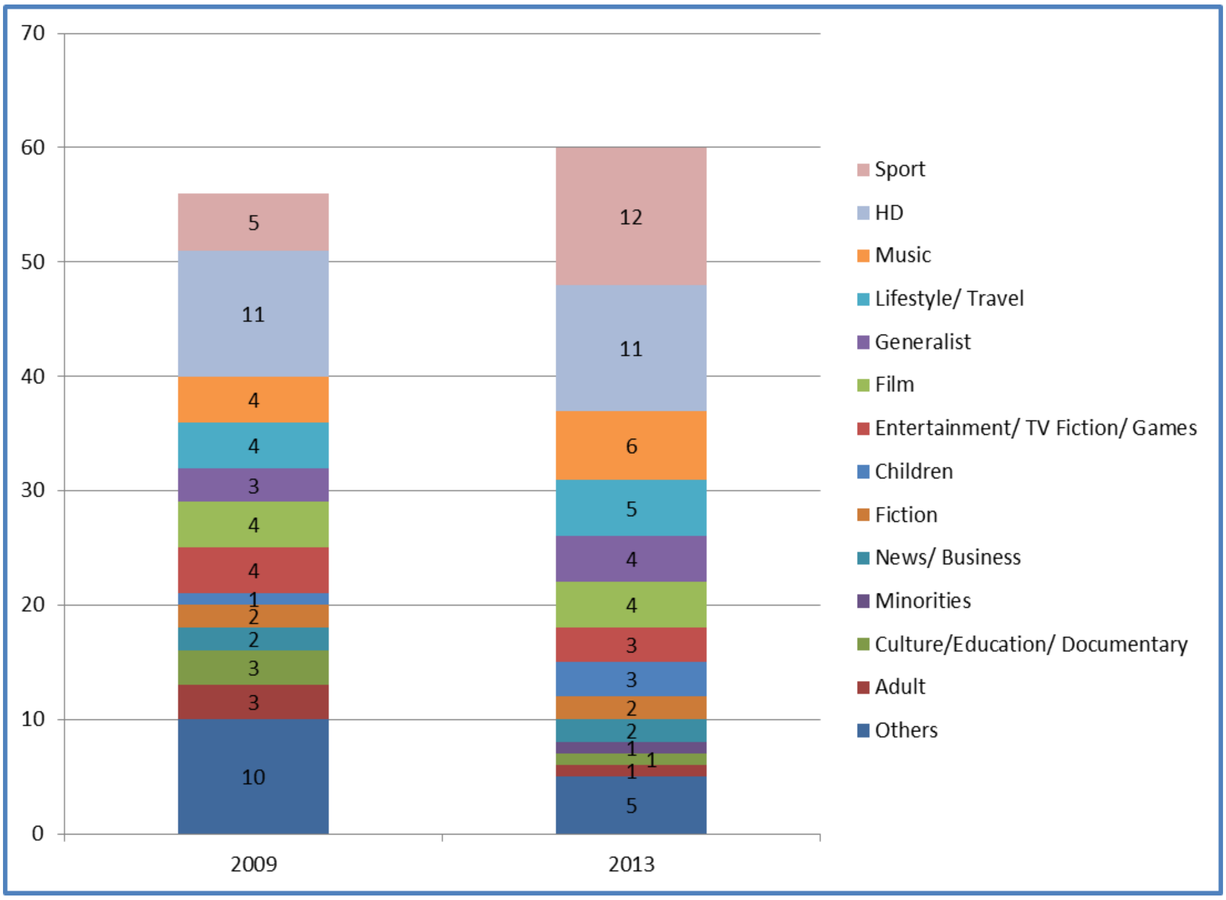


Source: European Audiovisual Observatory

Flemish Community of Belgium

- **Number of channels established in the Flemish Community of Belgium remained stable:** The total number of channels remained stable, increasing slightly by 7% from 56 channels in 2009 to 60 services in 2013.
- **Sport, HD, music, lifestyle and film among top 5 genres:** The most prominent genres in the Flemish Community of Belgium in 2013 were sport (total 12), HD (total 11), music (total 6), lifestyle/ travel (total 5) and film channels (total4).
- **More sport, children and music channels:** There were more sport (increase from 5 to 12), children (increase from 1 to 3), music (increase from 4 to 6 channels), minorities, generalist and lifestyle channels (+1 channel each) in 2013 than there were in 2009. At the same time, there were fewer entertainment (-1), adult (-2) and cultural channels (-2) whereas the number of HD, film, news/ business and fiction channels remained the same.

Figure 5: Number of linear audiovisual media services established in the Flemish Community of Belgium by genre in 2009 and 2013

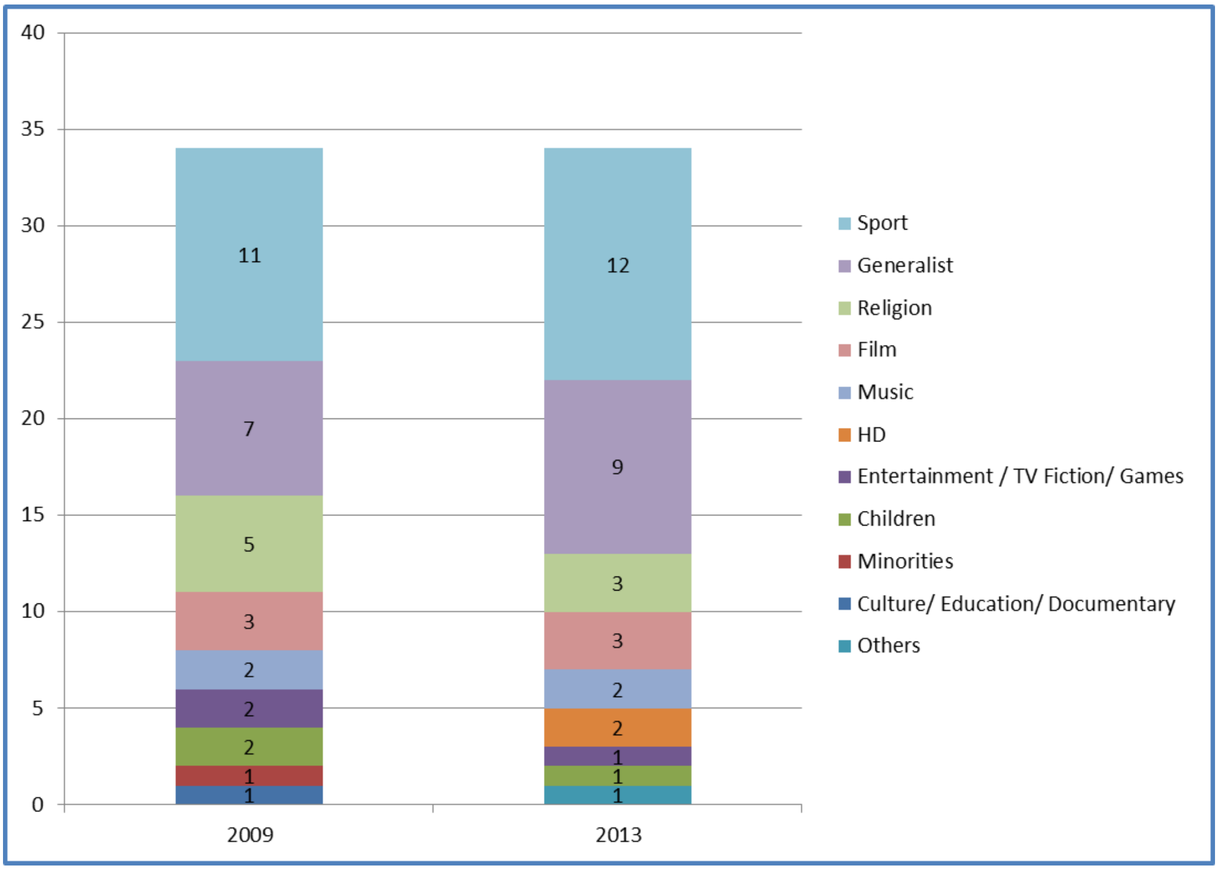


Source: European Audiovisual Observatory

CY – Cyprus

- **Number of television channels in Cyprus remained stable:** The total number of television channels in Cyprus remained unchanged in the five year period from 2009 to 2013 (total 34). Some of the local channels became national channels and a number of Russian channels moved to another country/countries.
- **Sport, generalist, film, religion and HD channels among 5 most prominent genres:** Sport (total 12), generalist (total 9), film (total 3), religion (total 3) and HD channels (total 2) were the most popular genres in Cyprus in 2013.
- **More generalist, sport and HD channels:** There were slightly more HD (+2), generalist (+2), and sport channels (+1) in 2013 than there were five years earlier. At the same time, the channel number of genres such as religion (-2), children, entertainment/ TV fiction/ games, culture/ education/ documentary and minorities channels dropped (-1 each). The number of film and music channels remained unchanged.

Figure 6: Number of linear audiovisual media services established in Cyprus by genre in 2009 and 2013

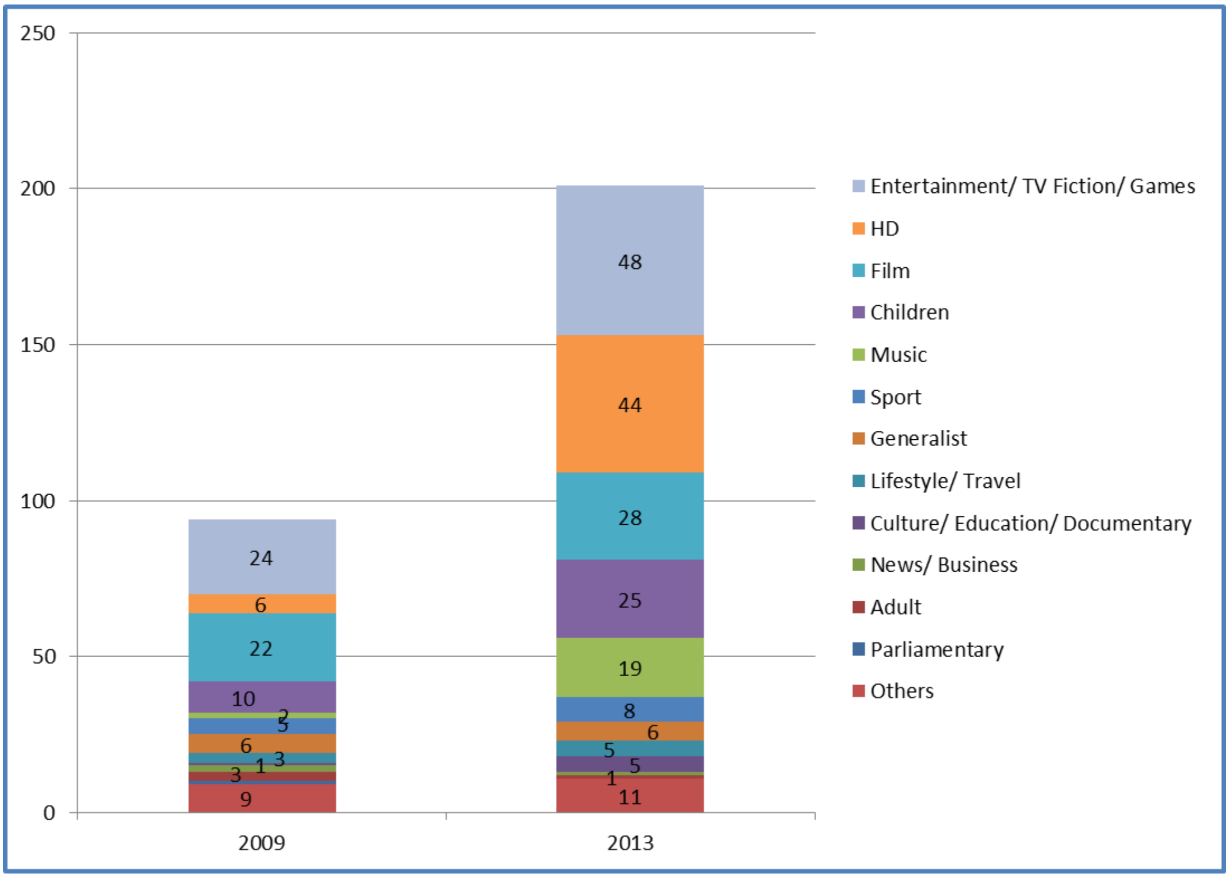


Source: European Audiovisual Observatory

CZ – Czech Republic

- **Czech Republic more than doubled number of channels:** The Czech Republic more than doubled the number of linear television services in five years from 94 in 2009 to a total of 201 in 2013 (114% growth).
- **Entertainment, HD, film, children and music were top 5 genres in the Czech Republic:** The genres entertainment (total 48), HD (total 44), film (total 28), children (total 25) and music channels (total 19) were among the top five genres in the country.
- **Music, HD, culture, children and entertainment drive channels growth:** There were significantly more HD (increase from 6 to 44), entertainment/ TV fiction/ games channels (increase from 24 to 48), music (increase from 2 to 19) and children channels (increase from 10 to 25) in 2013 than five years earlier. In addition, there were more film (+6), culture/ education/ documentary (+4), sport (+3) and lifestyle/ travel channels (+2). At the same time there were fewer news/ business (-1) and adult channels (-2) and the parliamentary channel ceased to exist. The number of generalist channels remained the same.

Figure 7: Number of linear audiovisual media services established in the Czech Republic by genre in 2009 and 2013

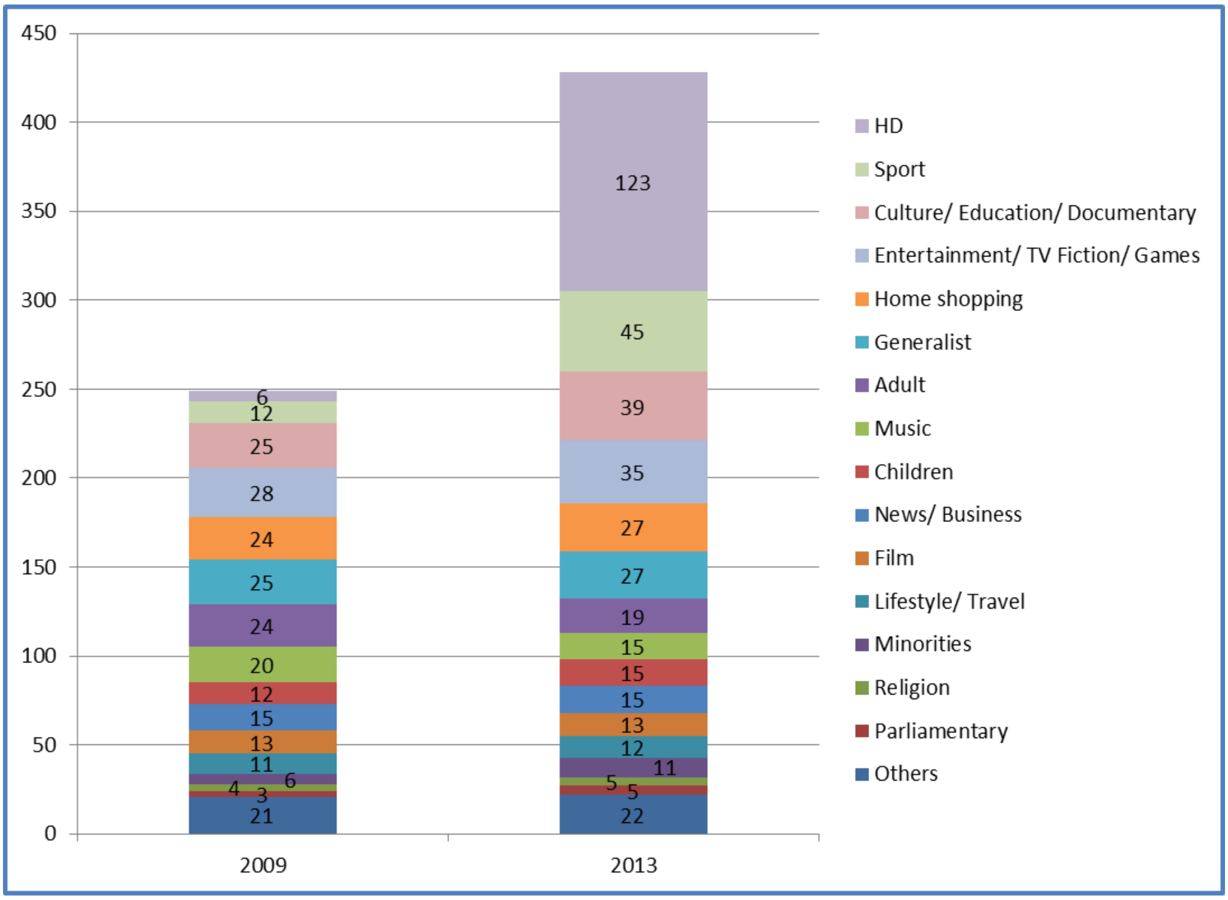


Source: European Audiovisual Observatory

DE – Germany

- **Germany increased number of established channels by over 70%:** The number of linear television channels established in Germany grew by 72% from 249 to 428 in the five year period from 2009 to 2013. Some of these target other German-speaking markets in Austria and Switzerland.
- **HD, sport, culture, entertainment and generalist channels among most popular genres:** The most popular genres of channels established in the country in 2013 were HD (total 123), sport (total 45), culture/ education/ documentary (total 39), entertainment/ TV fiction/ games (total 35) and generalist channels (total 27).
- **HD, sport and culture drive increase in channel number:** The number of HD channels jumped from a total of 6 in 2009 to 123 in 2013. This is followed by a significant increase in the number of sport channels which grew by 275% from 12 to 45 channels over five years and culture/ education/ documentary channels (+14). In addition, there were more entertainment/ TV fiction/ games (+7), minorities (+5), children (+3), home shopping (+3), parliamentary (+2), generalist (+2), religion and lifestyle/ travel channels (+1 each). At the same time there were fewer adult and music channels 9-5 each) whereas the number of news/ business (15) and film (13) channels remained the same.

Figure 8: Number of linear audiovisual media services established in Germany by genre in 2009 and 2013

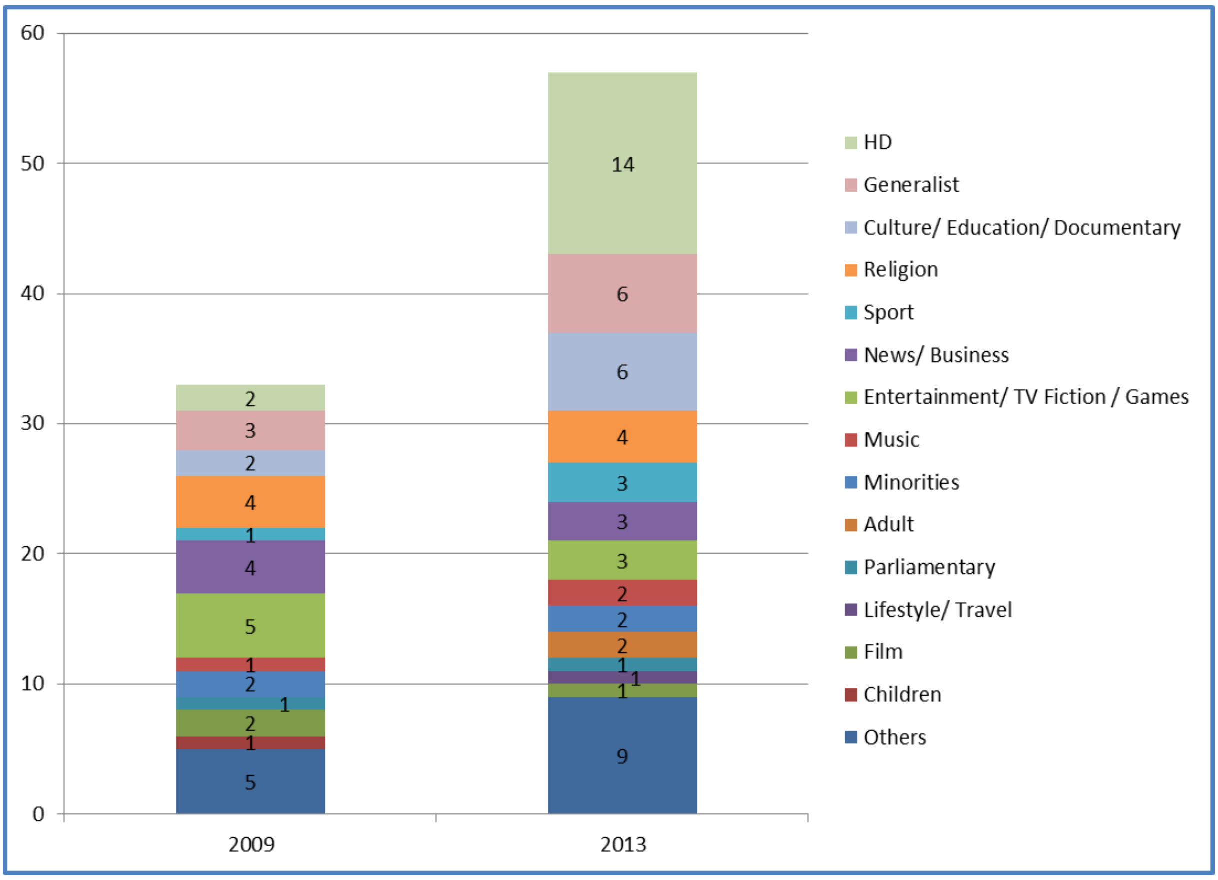


Source: European Audiovisual Observatory

DK – Denmark

- **Denmark increased number of established television services by almost 3/4 in 5 years:** The total number of television channels established in Denmark increased by 73% from 33 in 2009 to 57 services in 2013.
- **HD, culture, generalist, religion and entertainment channels among top 5 genres:** The top 5 genres of channels established in Denmark were HD (total 14), culture/ education/ documentary (total 6), generalist (total 6), religion (total 4) and entertainment/ TV fiction/ games channels.
- **More HD, culture and generalist channels in Denmark:** Denmark had significantly more HD (increase from 2 to 14) in 2013 than five years earlier. In addition, there were more culture/ education/ documentary (increase from 2 to 6), generalist (increase from 3 to 6), adult (+2), sport (+2), lifestyle/ travel (+1) and music channels (+1). At the same time there were fewer entertainment/ TV fiction/ games (-2), news/ business (-1), film channels (-1) and no more children's channels established in the country. The number of religion (4), minorities (2) and parliamentary (1) channels remained stable.

Figure 9: Number of linear audiovisual media services established in Denmark by genre in 2009 and 2013

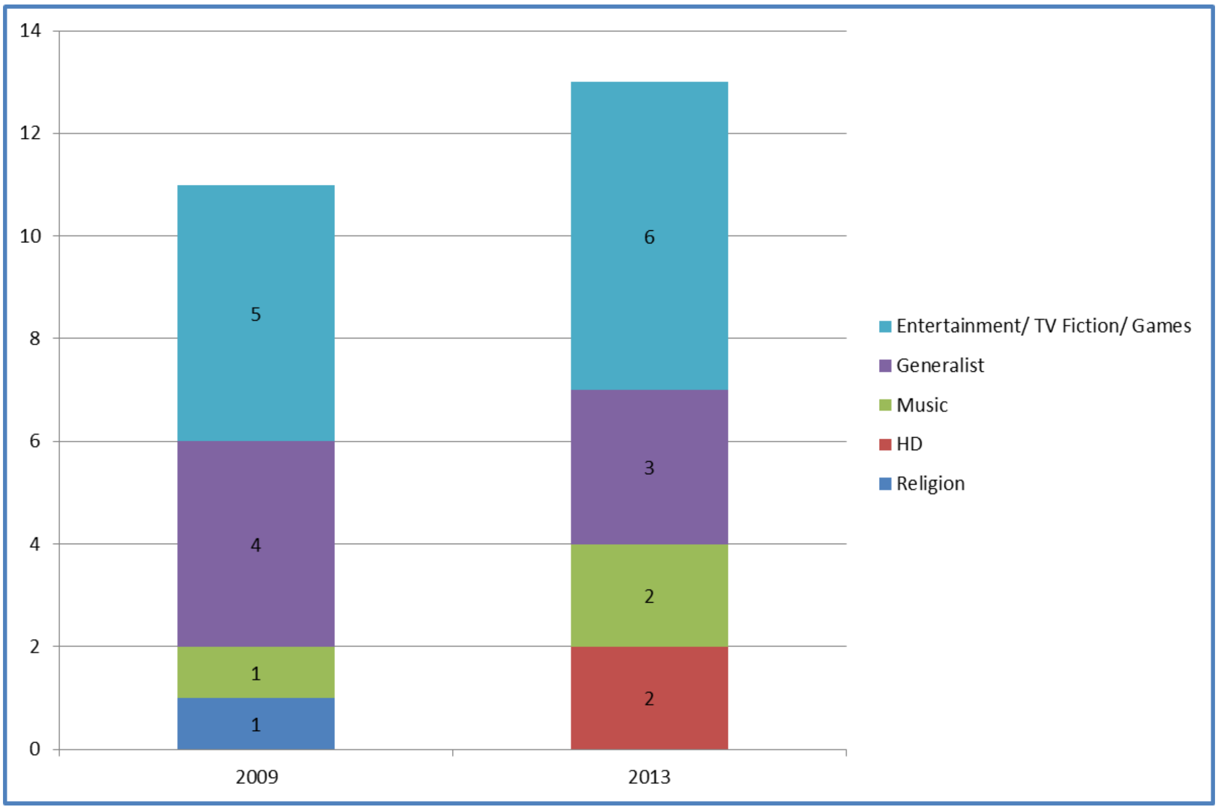


Source: European Audiovisual Observatory

EE – Estonia

- **Number of television channels established in Estonia remained relatively stable:** The total number of television channels established in Estonia remained relatively stable increasing only slightly from 11 to 13 services in the five year period.
- **Entertainment and generalist channels the most prominent genres in Estonia:** The most prominent genres of linear services established in Estonia in 2013 were entertainment/ TV fiction/ games (total 6) and generalist channels (total 3). In addition, there were two HD and two music channels established in the country.
- **More HD, music and entertainment channels in Estonia:** In 2013, Estonia had two HD channels that did not exist in 2009 and one more music and entertainment/ TV fiction/ games channel. The number of generalist channels was reduced from 4 to 3 services in the five year period and the religious channel disappeared completely.

Figure 10: Number of linear audiovisual media services established in Estonia by genre in 2009 and 2013



Source: European Audiovisual Observatory

ES – Spain

- **Number of television channels established in Spain remained relatively stable:** The total number of linear television channels in Spain remained relatively stable increasing only slightly by 11% from 231 to 265 services in the five year period.
- **Generalist, entertainment, HD, sport and lifestyle channels among top 5 genres:** The top five genres in Spain in 2013 were generalist (total 37), entertainment/ TV fiction/ games (total 32), HD (total 32), sport (total 27), lifestyle/ travel channels (total 17).
- **Significantly more HD and sport channels in Spain:** There were significantly more HD (increase from 4 to 32), sports channels (increase from 17 to 27) established in Spain than five years earlier. In addition, there were more lifestyle/ travel (increase from 11 to 17), entertainment/ TV fiction/ games (increase from 29 to 32) and two more religious channels established in Spain. At the same time there were fewer film (-8), culture/ education/ documentary (-5), home shopping (-4), generalist, music and news/ business channels (one less each). The number of children (14), international culture & linguistic (14), adult (9) and parliamentary channels (2) remained the same.

Figure 11: Number of linear audiovisual media services established in Spain by genre in 2009 and 2013

Source: European Audiovisual Observatory

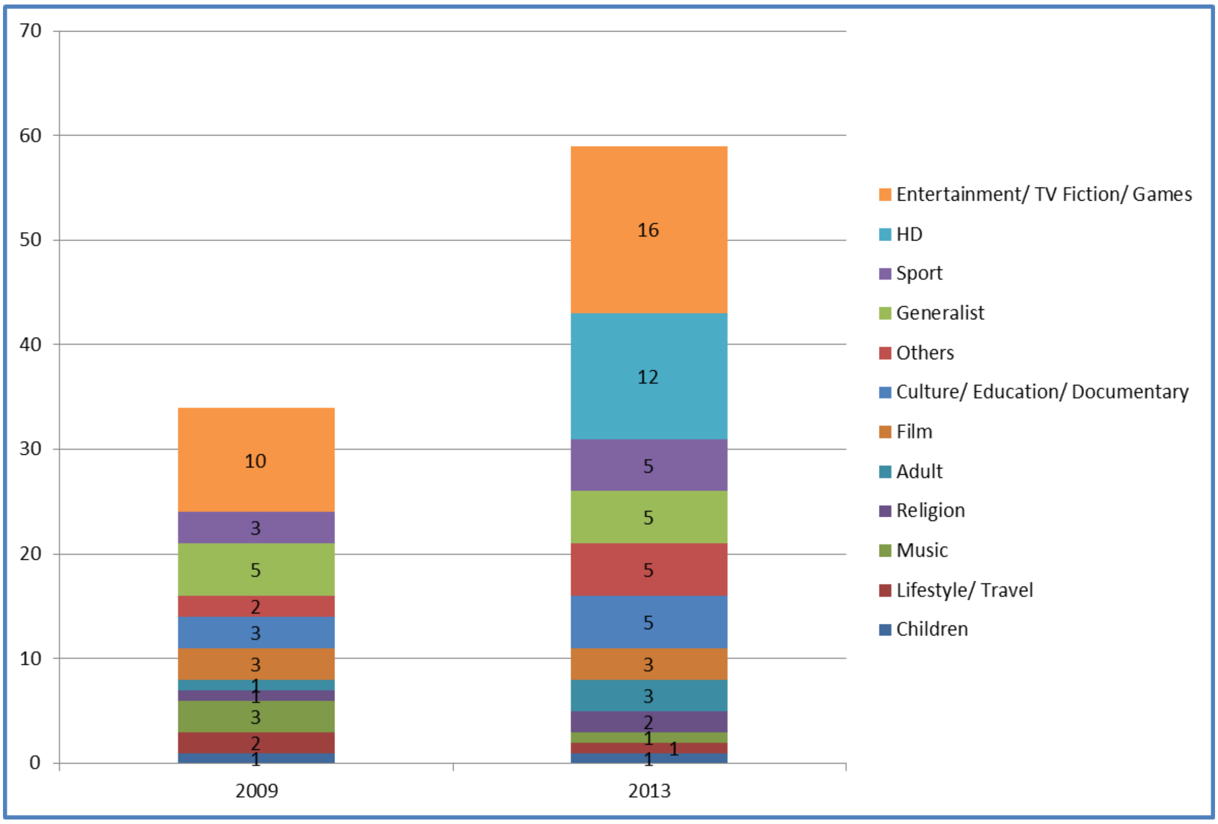
FI – Finland

- **Number of television channels established in Finland grows by over 70%:** The total number of television channels established in Finland grew by 74% from 34 in 2009 to 59 services in 2013.

- **Entertainment and HD before culture, generalist and sport as most popular genres in Finland:** The most popular television genres of channels established in Finland in 2013 were entertainment/ TV fiction/ games (total 16), HD (total 12), culture/ education/ documentary (total 5), generalist (total 5) and sport channels (total 5).

- **Significantly more HD and entertainment channels in Finland:** Entertainment channels established in Finland increased from 10 to a total of 16 services over the five year period (60% increase) and HD channels developed from none in 2009 to a total of 12 in 2013. Genres that also expanded in numbers were sport (+2), culture/ education/ documentary channels (+2), adult channels (+2), as well as religious channels (+1). At the same time there were fewer lifestyle/ travel channels (down from 2 to 1) and music channels decreased from 3 to 1 service. The number of generalist (total 5), film (total 3) and children's channels (total 1) remained stable.

Figure 12: Number of linear audiovisual media services established in Finland by genre in 2009 and 2013

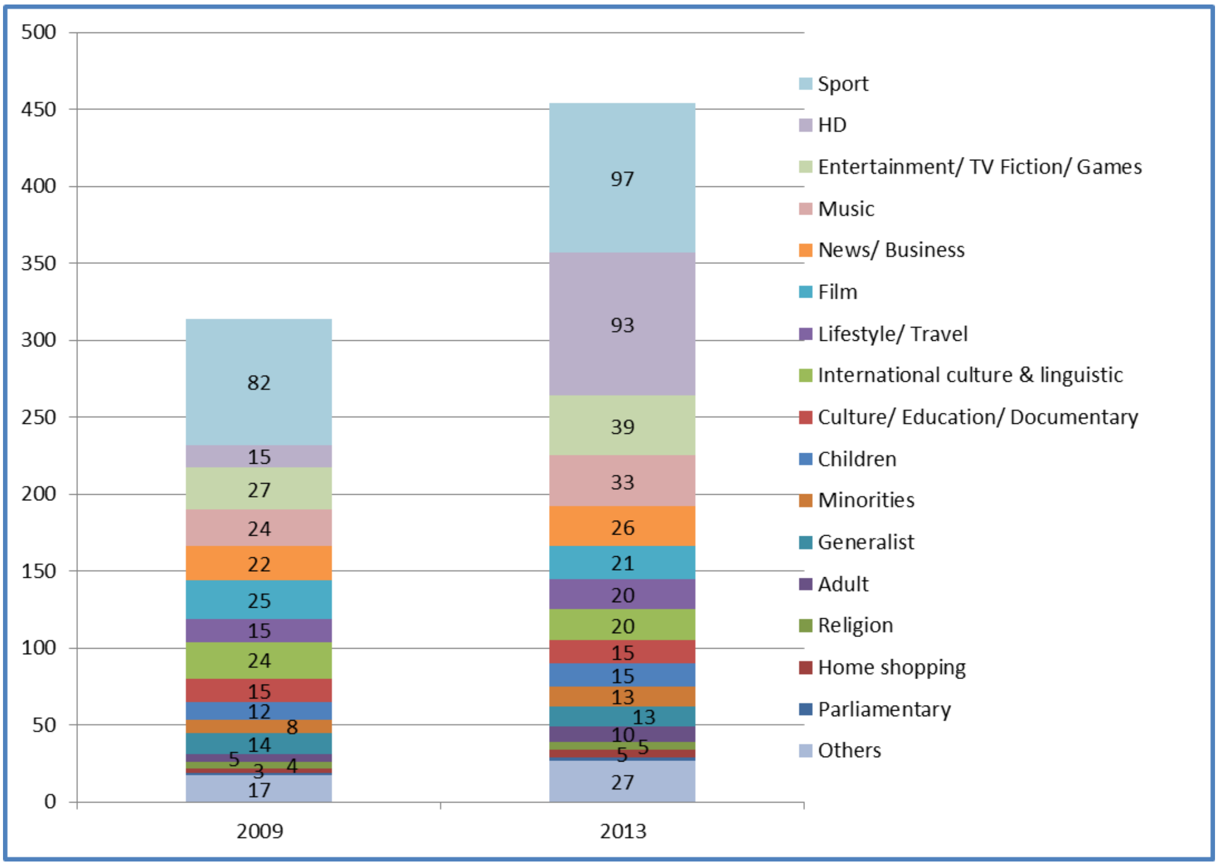


Source: European Audiovisual Observatory

FR – France

- **Total of established channels in France grows by almost half:** The total number of channels established in France grew by 45% from 314 to 454 services in 2013. This also includes the language versions of Euronews which were among the 215 channels that targeted foreign markets in 2013.
- **Sport, HD, entertainment, music and news among top 5 genres:** The most popular genres of channels established in France in 2013 included sport (total 97), HD (total 93), entertainment (total 39), music (total 33) and news/ business channels (total 26).
- **Significant growth among HD, sport and entertainment channels in France:** HD channels established in France grew from 15 in 2009 to 93 services in 2013 (520% increase). Genres that also grew significantly in numbers were sport channels (increase from 82 to 97), entertainment/ TV fiction/ games channels (increase from 27 to 39) and music channels (increase from 24 to 33). Other genres with more channels were adult (+5), minorities (+5), lifestyle/ travel (+5), news/ business channels (+4), children (+3) home shopping (+2) and religion (+1). At the same time there were fewer international culture & linguistic (-4), film (-4) and generalist channels (-1) than five years earlier.

Figure 13: Number of linear audiovisual media services established in France by genre in 2009 and 2013

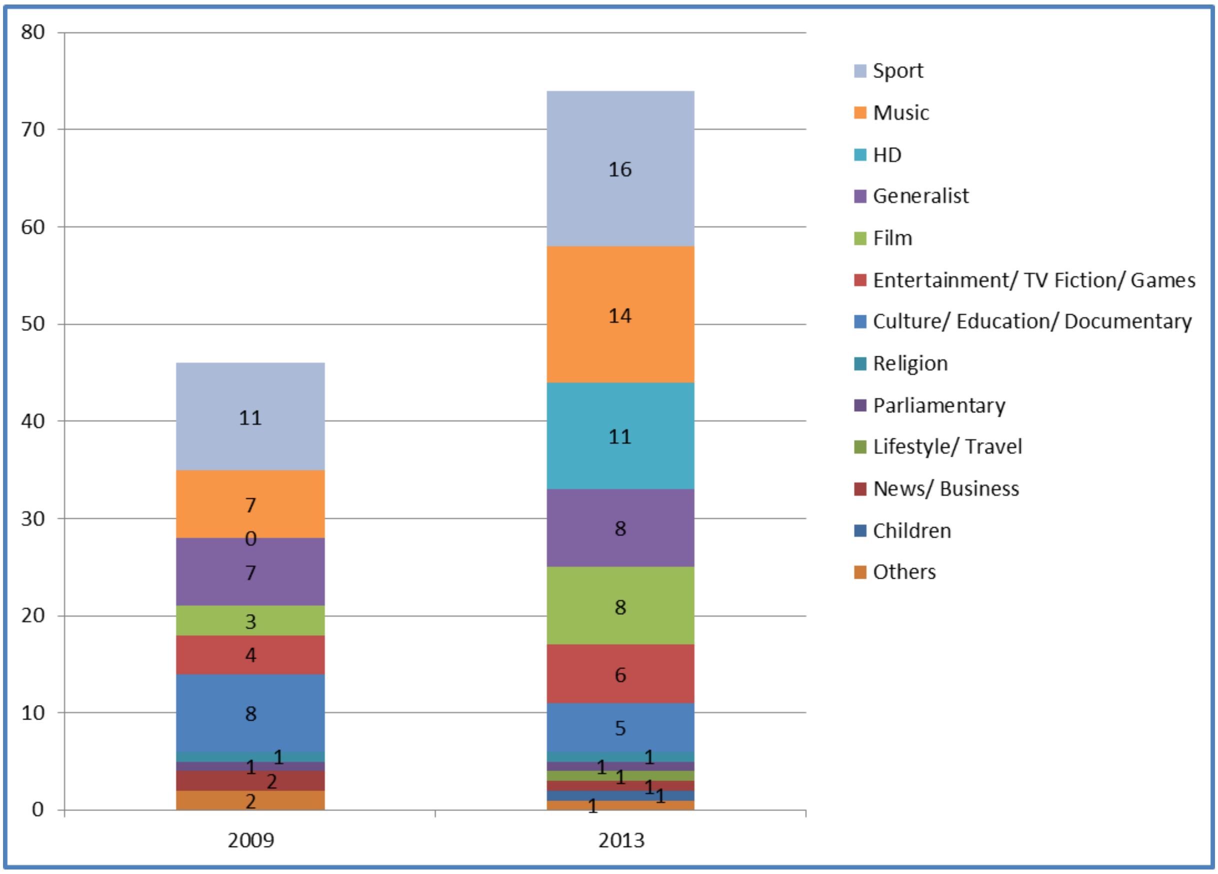


Source: European Audiovisual Observatory

GR – Greece

- **Number of television channels established in Greece grew by almost 70%:** The total number of television channels established in Greece in 2013 grew by 69% from 45 to 76 services.
- **Sport, music, HD, film and generalist channels among top 5 genres in Greece:** The most important genres of television channels established in Greece in 2013 were sport (total 16), music (total 14), HD (total 11), film (total 8) and generalist channels (total 8).
- **HD, music, film and sport drive growth of television channel number:** In 2013, Greece had 11 HD channels established in the country that did not exist in 2009. In addition, there were significantly more music (increase from 7 to 14), film (increase from 3 to 8) and sport channels (increase from 11 to 16) established in the country. Other genres that also grew in size were entertainment (+2), children (+1), lifestyle/ travel (+1) and generalist channels (+1). At the same time culture/ education/ documentary channels dropped from 8 to 5 channels and news/ business decreased from 2 to 1 channel. The number of parliamentary and religious channels remained stable (one each).

Figure 14: Number of linear audiovisual media services established in Greece by genre in 2009 and 2013

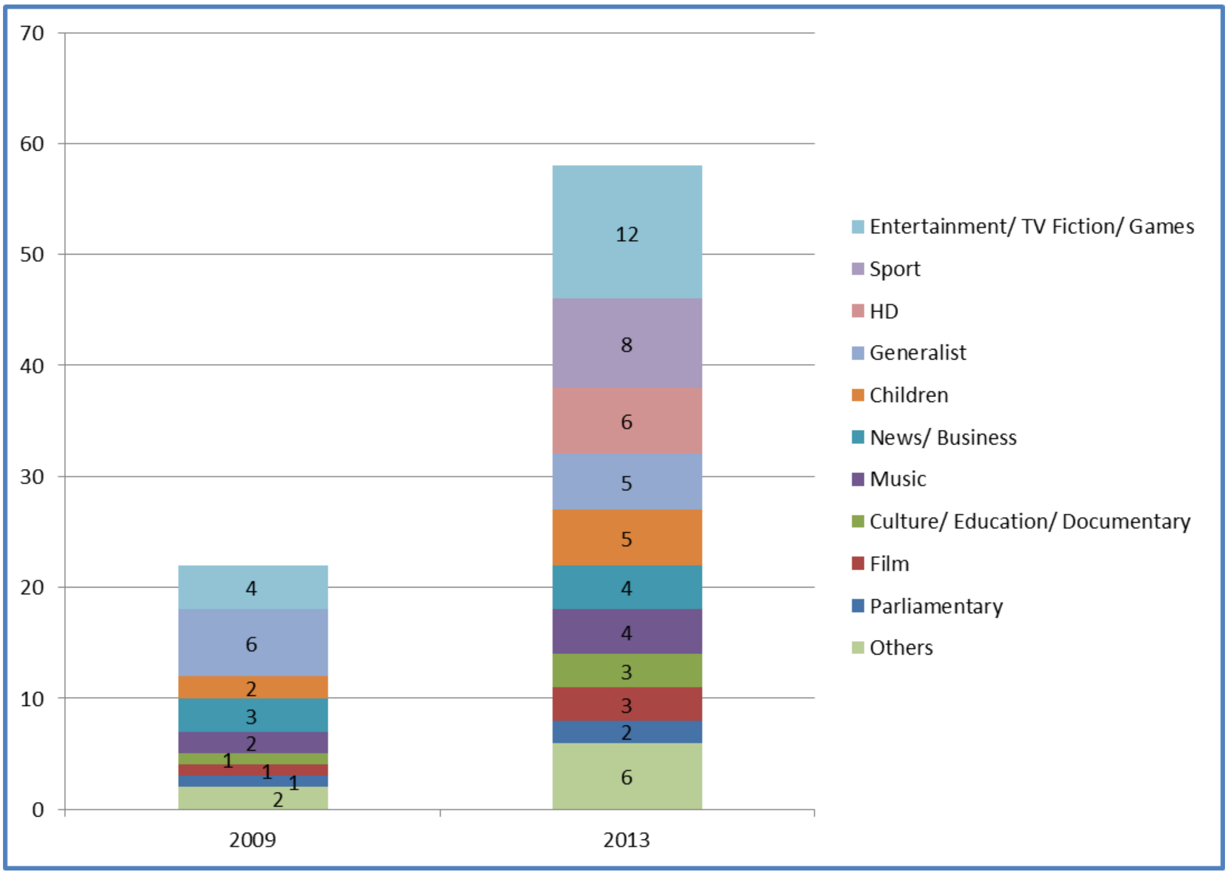


Source: European Audiovisual Observatory

HR – Croatia

- **Number of television channels in Hungary almost tripled in 5 years:** The total number of channels established in Croatia grew by 164% from 22 in 2009 to 58 in 2013.
- **Entertainment, sport, HD, children and generalist channels most popular genres in Croatia:** The most popular genres of television channels established in Croatia in 2013 were entertainment/ TV fiction/ games (total 12), followed by sport (total 8), HD (total 6), children (total 5) and generalist channels (total 5).
- **Sport, entertainment and HD drove growth in number of television channels in Croatia:** Croatia had 8 sport and 6 HD channels in 2013 which did not exist five years earlier. Another genre with a substantial growth rate was entertainment/ TV fiction/ games (increase from 4 to 12). In 2013, Croatia also had more children (+3), film (+2), culture/ education/ documentary (+2), music (+2), parliamentary (+1) and news/business channels (+1). The number of generalist channels dropped from 6 to 5 channels in the five year period.

Figure 15: Number of linear audiovisual media services established in Croatia by genre in 2009 and 2013

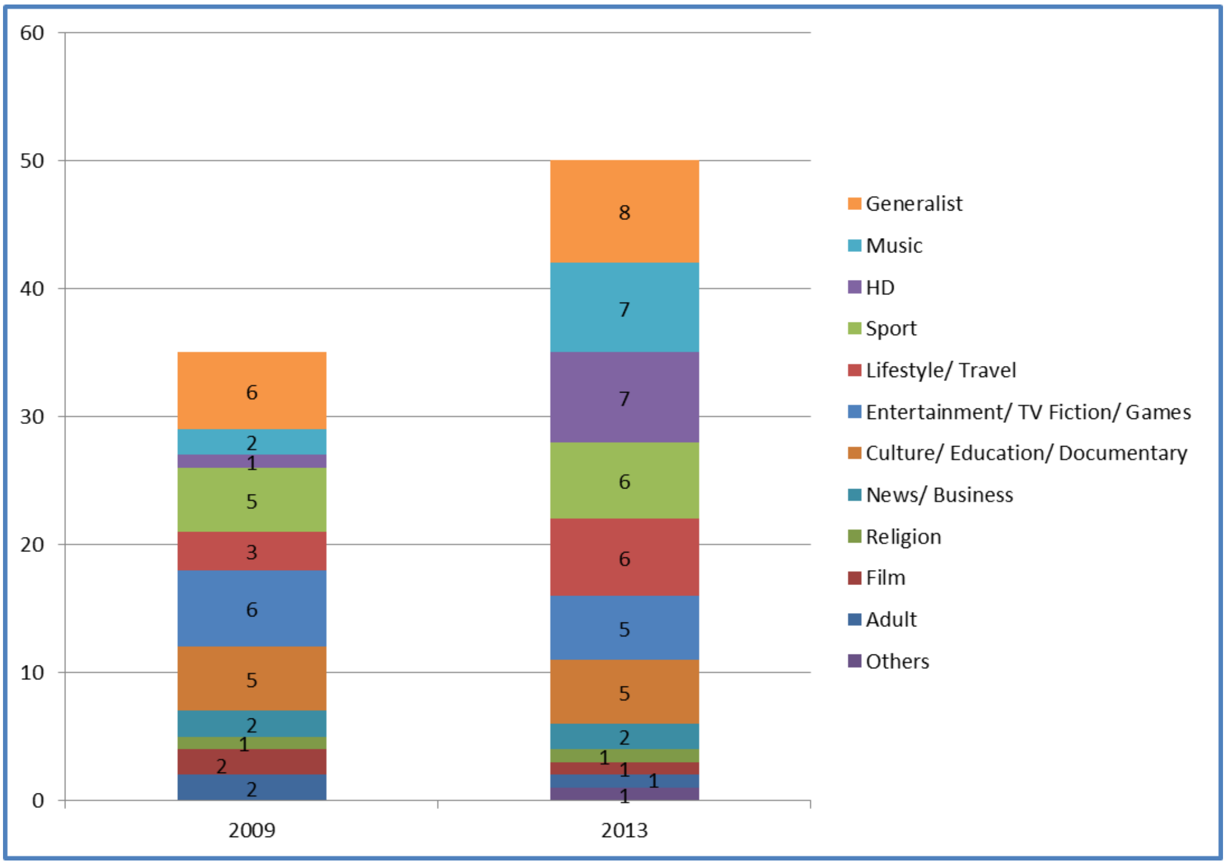


Source: European Audiovisual Observatory

HU – Hungary

- **Total of channels established in Hungary grew by more than 2/5 from 2009 to 2013:** The total number of channels established in Hungary grew by 43% from 35 in 2009 to 50 services in 2013.
- **Generalist, HD, music, lifestyle and sport top 5 genres in Hungary:** The leading genres of television channels established in Hungary in 2013 were generalist (total 8), HD (total 7), music (total 7), lifestyle/ travel (total 6) and sport (total 6).
- **Genres HD, music, lifestyle and generalist drove channel growth in Hungary:** In 2013, Hungary had 7 HD channels established in the country compared to just one in 2009. In addition, music channels increased by 5 from 2 to a total of 7, as did lifestyle (+3), generalist (+2) and sport channels (+1). At the same time there were fewer entertainment/ TV fiction/ games (down from 6 to 5), adult and film channels (drop from 2 to 1 each). The number of culture/ education/ documentary (5), news (2) and religious channels (1) remained stable.

Figure 16: Number of linear audiovisual media services established in Hungary by genre in 2009 and 2013

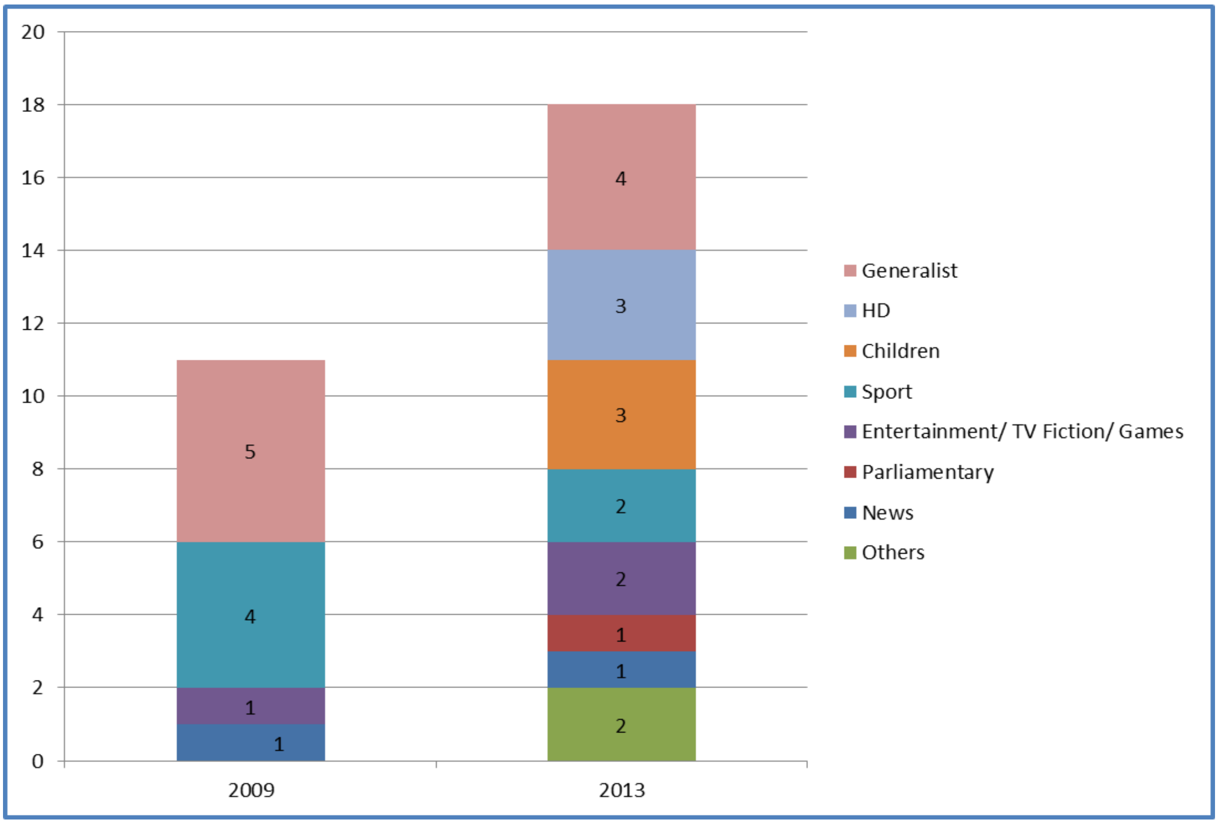


Source: European Audiovisual Observatory

IE – Ireland

- **Number of television channels established in Ireland grew by 2/3 in 5 years:** The total number of channels established in Ireland grew by 64% from 11 in 2009 to 18 services in 2013.
- **Most important genres included generalist, children and HD channels:** The most important genres of channels established in Ireland in 2013 were generalist (total 5), children (total 3), and HD channels (total 3). In addition, there were two entertainment/ TV fiction/ games and sport channels each as well as a news and parliamentary channel.
- **More children and HD channels in 5 year period:** There were 3 HD and children channels as well as one parliamentary channel established in Ireland on 2013 that did not exist in 2009. In addition, there was one more entertainment channel (2 instead of 1). The number of generalist (4 instead of 5) and sport channels (2 instead of 4) decreased slightly whereas the news channel continued to exist over the five year period of analysis.

Figure 17: Number of linear audiovisual media services established in Ireland by genre in 2009 and 2013



Source: European Audiovisual Observatory

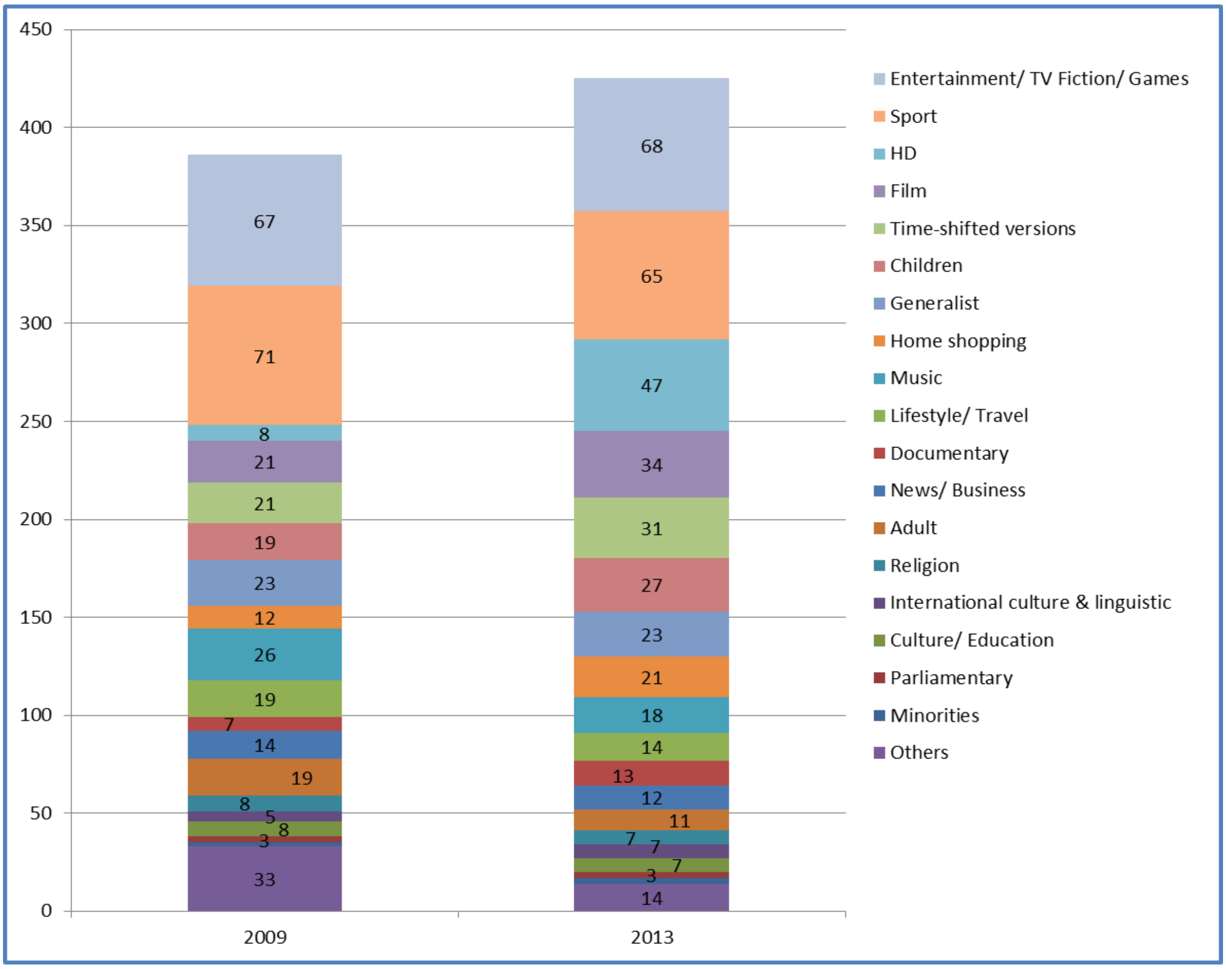
IT – Italy

- **Number of channels established in Italy remained relatively stable over 5 year period:** The total number of channels established in Italy grew by 11% from 385 in 2009 to 427 services in 2013. The development of the number of channels over time shows a drop in 2012 and 2013 which was partly due to the shutting down of a number of pay DTT channels.

- **Entertainment, sport, HD and film most popular genres in Italy:** The most important genres of television channels established in Italy in 2013 were entertainment/ TV fiction/ games (total 68), sport (total 65), film (total 34), time-shifted versions (31) and children's channels (total 27).

- **Significantly more HD, film, time-shifted versions and home shopping channels in Italy:** In 2013, there were significantly more HD (488% increase from 8 to 48), film (62% increase from 21 to 34), time-shifted versions (48% increase from 21 to 31) and home shopping channels (75% increase from 12 to 21) established in the country than five years earlier. Other genres that expanded in size included children (+8), documentary (+6), international culture & linguistic (+2), minorities (+1) and entertainment channels (+1). The number of culture/ education, religion, news/ business, lifestyle, music and adult channels dropped in five years whereas the number of generalist and parliamentary channels remained the same.

Figure 18: Number of linear audiovisual media services established in Italy by genre in 2009 and 2013

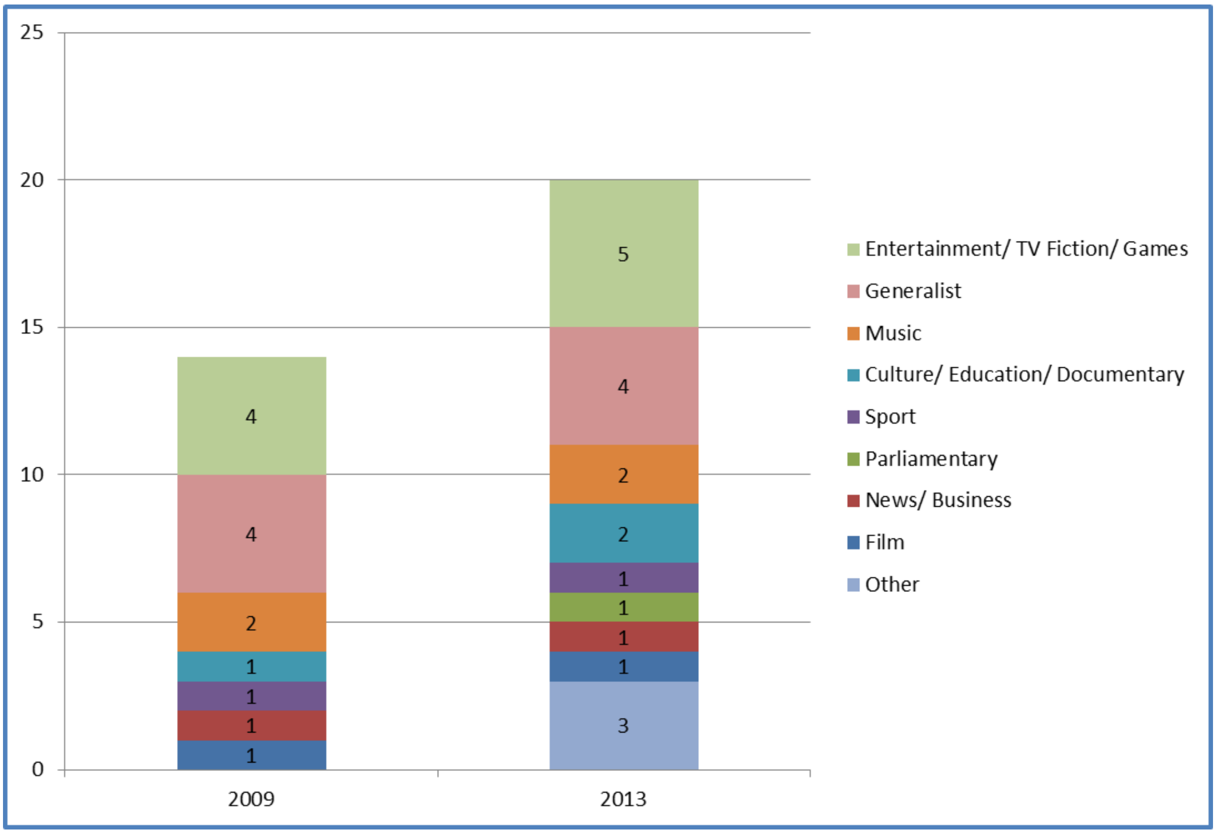


Source: European Audiovisual Observatory

LT – Lithuania

- **Total number of channels established in Lithuania grew by 2/5 in 5 years:** The total number of channels established in Lithuania grew by 43% from 14 in 2009 to 20 in 2013.
- **Top genres in Lithuania were entertainment and generalist channels:** The most important genres of channels established in Lithuania in 2013 were entertainment/ TV fiction/ games (total 5), followed by generalist (total 4), culture/education/ documentary (total 2) and music channels (total 2). In addition, there was one channel each from the genres film, news/ business, parliamentary and sport.
- **More culture and entertainment channels in Lithuania:** In 2013, there were slightly more culture/ education/ documentary (increase from 1 to 2) and entertainment channels (increase from 4 to 5) than there were 5 years earlier. The number of generalist (4), music (2), film (1), news/ business (1) and sport channels (1) remained unchanged.

Figure 19: Number of linear audiovisual media services established in Lithuania by genre in 2009 and 2013

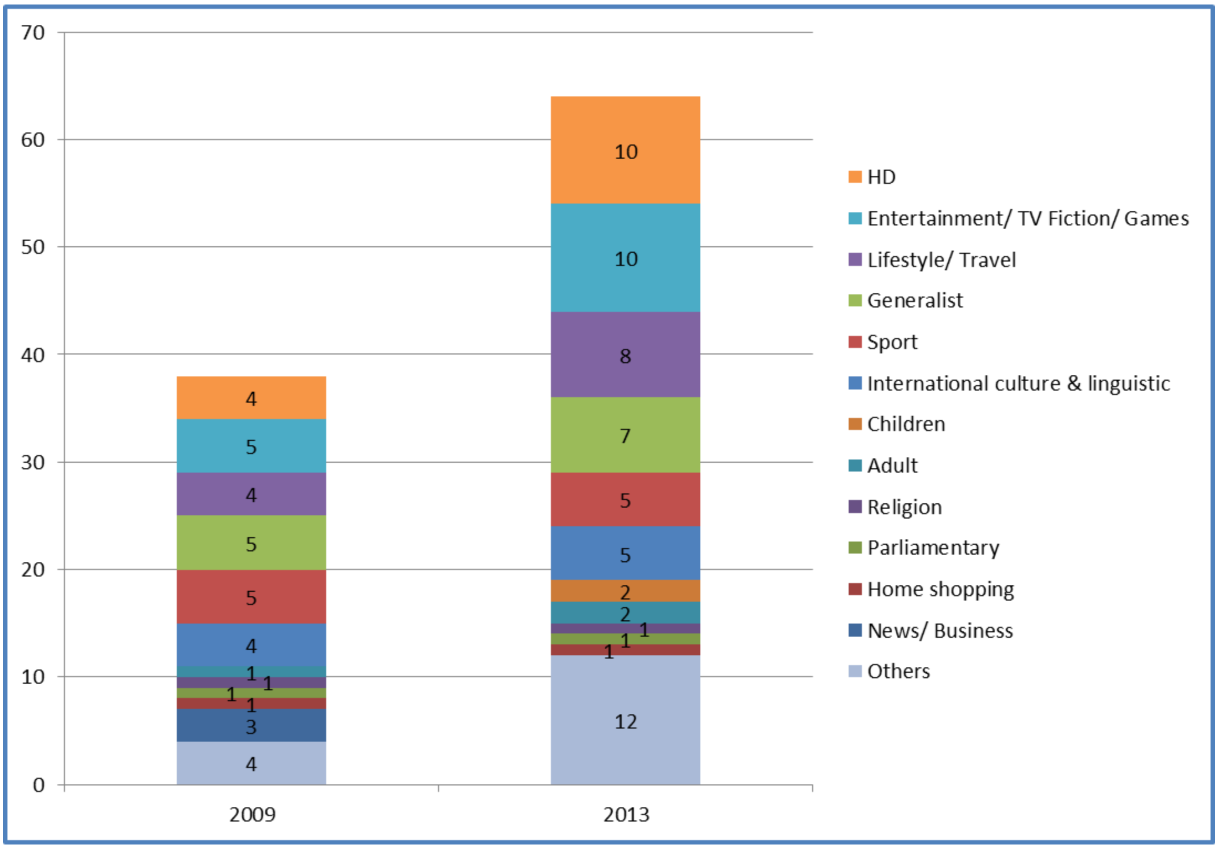


Source: European Audiovisual Observatory

LU – Luxembourg

- **Number of channels established in Luxembourg grew by over 2/3 in five years:** The total number of channels established in Luxembourg grew by 68% from 38 in 2009 to 64 in 2013.
- **Entertainment, HD, lifestyle, generalist and international cultural channels among top 5 genres:** The most important genres of television channels established in Luxembourg in 2013 were entertainment/ TV fiction/ games (total 10), HD (total 10), lifestyle (total 8), generalist (total 7), international culture & linguistic channels (total 5) and sport channels (total 5).
- **Growth of channels driven by genres HD, entertainment and lifestyle:** There were two children channels established in Luxembourg in 2013 that did not exist in 2009. Other genres that expanded in the number of channels included HD (150% increase from 4 to 12), entertainment/ TV fiction/ games (100% increase from 5 to 10) and lifestyle (100% growth from 4 to 8). In addition, there were more generalist (+2), adult (+1) and international culture & linguistic channels (+1) than there were five years earlier. At the same time the number of sport (5), home shopping (1), parliamentary (1) and religious channels (1) remained unchanged whereas the three news/ business channels that existed in 2009 disappeared completely.

Figure 20: Number of linear audiovisual media services established in Luxembourg by genre in 2009 and 2013

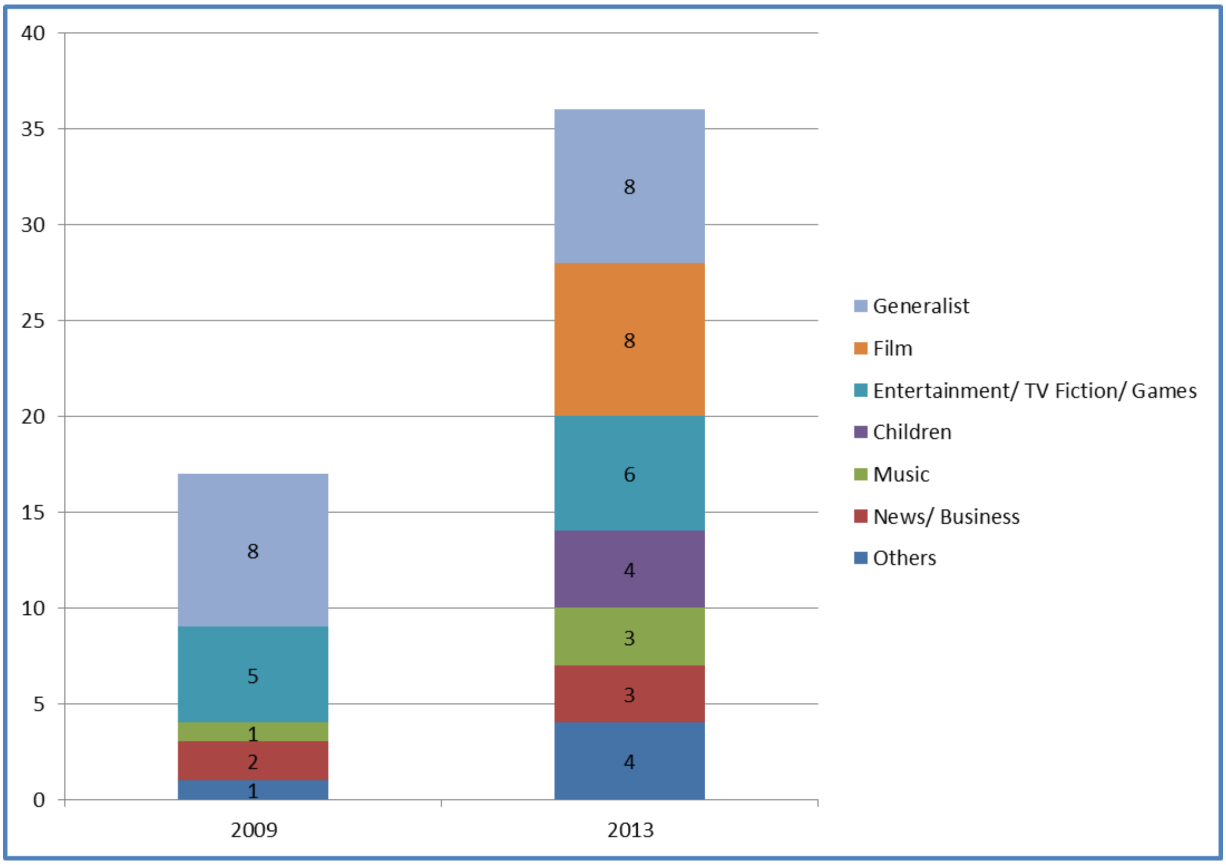


Source: European Audiovisual Observatory

LV – Latvia

- **Number of channels established in Latvia more than doubled in 5 years:** The total number of channels established in Latvia grew by 112% from 17 to 36 services.
- **Film, generalist and entertainment most important genres in Latvia:** The most important genres of television channels established in Latvia in 2013 were film (total 8), generalist (total 8) and entertainment/ TV fiction/ games (total 6). In addition, the country had four children channels as well as three channels each of the genres news/business and music.
- **Growth in channel number driven by genres film, children and music:** There were eight film and 4 children channels established in Latvia that did not exist in 2009. In addition, there were more music channels (3 instead of 1) and news/ business channels (6 instead of 5) in the country than there were five years earlier. The number of generalist channels remained the same (total 8).

Figure 21: Number of linear audiovisual media services established in Latvia by genre in 2009 and 2013

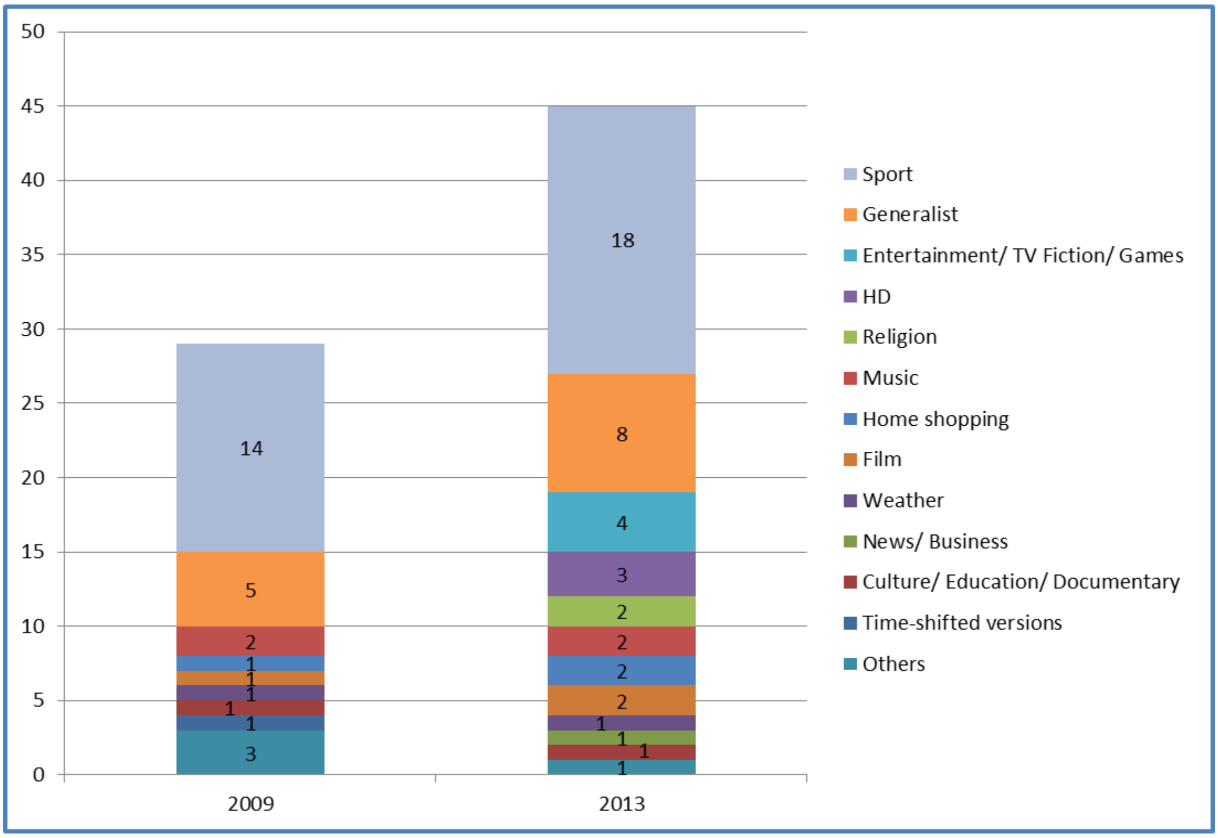


Source: European Audiovisual Observatory

MT – Malta

- **Number of television channels established in Malta grew by almost 2/3:** The total number of television channels established in Malta increased by 61% from 28 in 2009 to 45 in 2013.
- **Sport, generalist, entertainment, HD and film among top 5 genres:** The most popular genres of channels established in Malta in 2013 were sport (total 18), generalist (8), entertainment/ TV fiction/ games (total 4), HD (total 3) and film (total 2).
- **More entertainment, sport, HD and generalist channels in Cyprus:** In 2013, there were four entertainment, three HD, two religion and one news/ business channel established in Malta that did not exist in 2009. In addition, there were more sport (+4), generalist (+3), film (+1) and home shopping channels (+1) than there were five years ago. At the same time the time-shifted version of a channel disappeared while the number of music (2), culture/ education/ documentary (1) and weather channels (1) remained the same.

Figure 22: Number of linear audiovisual media services established in Malta by genre in 2009 and 2013



Source: European Audiovisual Observatory

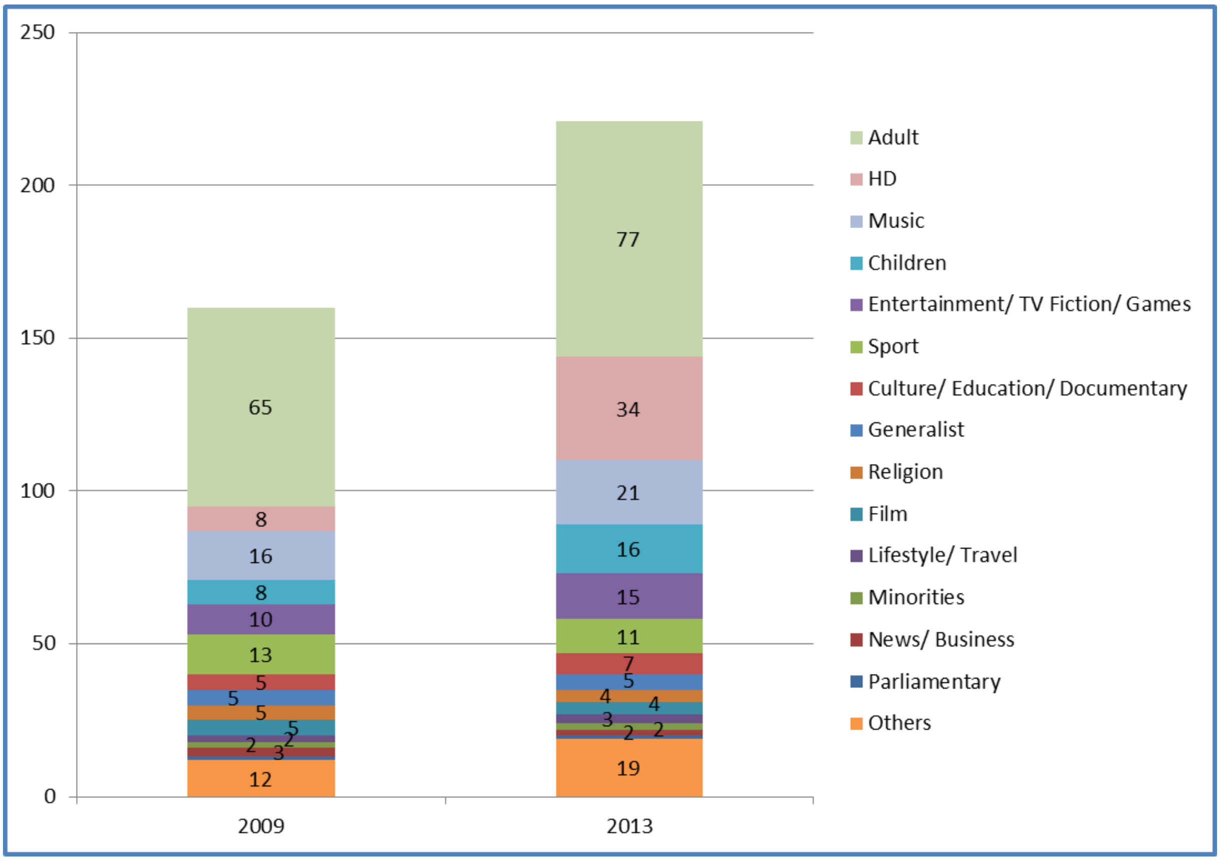
NL – Netherlands

- **Total number of channels established in the Netherlands increased by over 1/3:** The total channels established in the Netherlands grew by 38% from 160 in 2009 to 221 services in 2013. The development in the number of services showed a drop in 2013 which was partly due to the closure of a number of adult channels. The Netherlands is a country with a significant number of channels that target other countries (total 99).

- **Adult, HD, music, children and entertainment among top 5 genres:** The most popular genres of channels established in the Netherlands in 2013 were adult (total 77), HD (total 34), music (total 21), children (16) and entertainment/ TV fiction/ games channels (total 15).

- **Channel growth driven by genres HD, adult and children:** There was a substantial growth in the genres HD (325% increase from 8 to 34), adult (10% increase from 65 to 77) and children's channels (100% increase from 8 to 16). In addition, there were more entertainment/ TV fiction/ games (+5), music (+5), culture/ education/ documentary (+2) and lifestyle/ travel channels (+1) than there were five years earlier. At the same time the number of sport (-2), film (-1), religion (-1) and news/ business (-1) decreased in the five year period. The figures for generalist (5), minorities (2) and parliamentary (1) channels remained the same.

Figure 23: Number of linear audiovisual media services established in the Netherlands by genre in 2009 and 2013



Source: European Audiovisual Observatory

PL – Poland

- **Total number of channels established in Poland grew significantly by over 2/3:** The total number of television channels established in Poland grew by 63% from 72 in 2009 to 117 services in 2013.
- **HD, entertainment, music, sport and culture among top 5 genres:** The most popular genres of channels established in Poland in 2013 were HD (total 28), entertainment/ TV fiction/ games (total 16), music (total 10), sport (total 10) and culture/ education/ documentary channels (total 9).
- **Genres HD, entertainment and music drove channel growth:** The largest increases in numbers of channels were registered in the genres HD (211% increase from 9 to 28), music (233% increase from 3 to 10) and entertainment/ TV fiction/ games channels (167% increase from 6 to 16). There were also more lifestyle/ travel (+3), news/ business (+2) and film channels (+2) in 2013 than there were 5 years earlier. At the same time the number of culture/ education/ documentary (9) and generalist channels (6) and children's channels decreased and the three children's channels that existed in 2009 disappeared completely. The number of sport (10) and religious channels (2) remained stable.

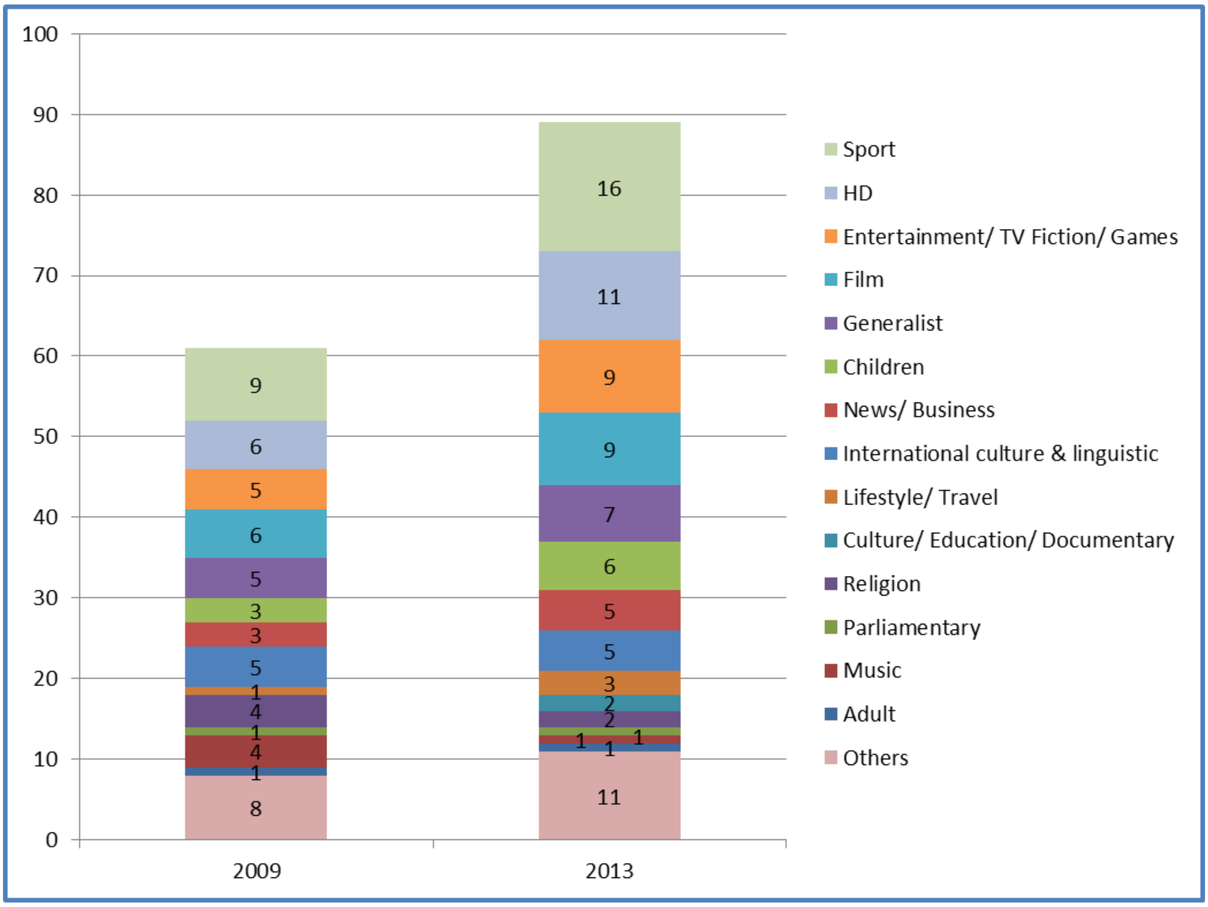
Figure 24: Number of linear audiovisual media services established in Poland by genre in 2009 and 2013

Source: European Audiovisual Observatory

PT – Portugal

- **Number of channels established in Portugal increased by almost 50%:** The total number of channels established in Portugal grew by 46% from 61 in 2009 to 89 in 2013.
- **Sport, HD, film, entertainment and generalist channels most popular genres in Portugal:** The most important genres of channels established in Portugal were sport (total 16), HD (total 11), film (total9), entertainment/ TV fiction/ games (total 9) and generalist channels (total 7).
- **Channel growth driven by sport, HD and entertainment:** The genres sport, HD and entertainment were the main drivers of channel growth in Portugal. Sport channels expanded by 7 from 9 to 16, HD channels increased by 5 from 6 to 11 services in 2013 and entertainment/ TV fiction/ games grew by 4 from 5 to 9 services. There were also more film (+3), children (+3), generalist (+2), lifestyle/ travel channels (+2) and two new culture/ education/ documentary channels in 2013. At the same time there were fewer religion (-2) and music channels (-3) whereas the number of international culture & linguistic (5), adult (1) and parliamentary (1) channel remained the same.

Figure 25: Number of linear audiovisual media services established in Portugal by genre in 2009 and 2013



Source: European Audiovisual Observatory

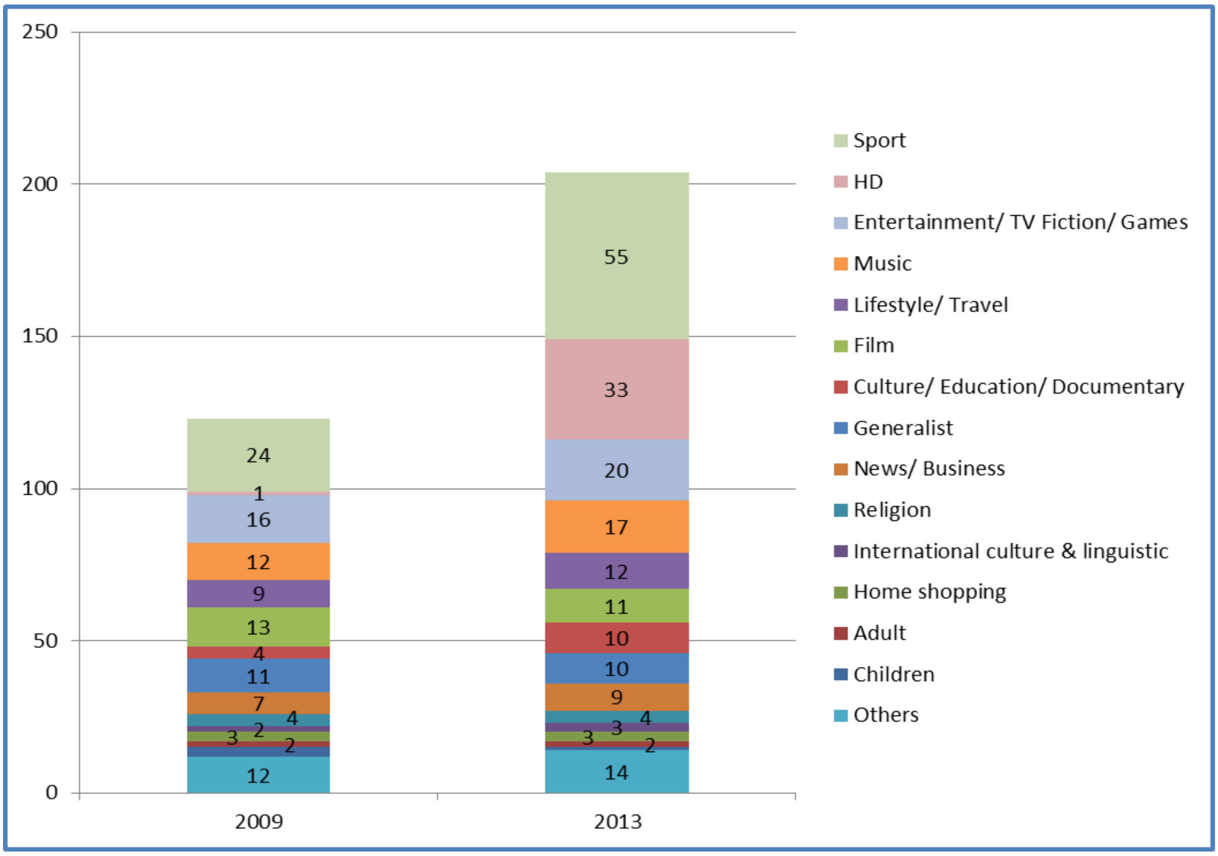
RO – Romania

- **Number of television channels established in Romania increased by almost 2/3:** The total number of television channels established in Romania grew by 65% from 124 in 2009 to 205 services in 2013.

- **Sport, HD, entertainment, music and lifestyle most popular genres in Romania:** The most popular genres of television channels established in Romania in 2013 were sport (total 55), HD (total 33), entertainment/ TV fiction/ games (total 20), music (total 17) and lifestyle/ travel channels (total 12).

- **Significant increase in channels driven by HD and sport:** A large part of the channel growth experienced by the Romanian market was driven by significant increases of channels in the genres HD (increase by 32 services from 1 to 33) and sport (increase by 31 from 24 to 55). There were also more culture/ education/ documentary (+6), music (+5), entertainment channels (+4), lifestyle/ travel (+3), news/ business (+2), international culture & linguistic channels (+1) in 2013 than there were in 2009. At the same time there were fewer generalist (-1), film (-2) and children (-2) channels than before whereas the number of religion (4), home shopping (3) and adult channels (2) remained the same.

Figure 26: Number of linear audiovisual media services established in Romania by genre in 2009 and 2013

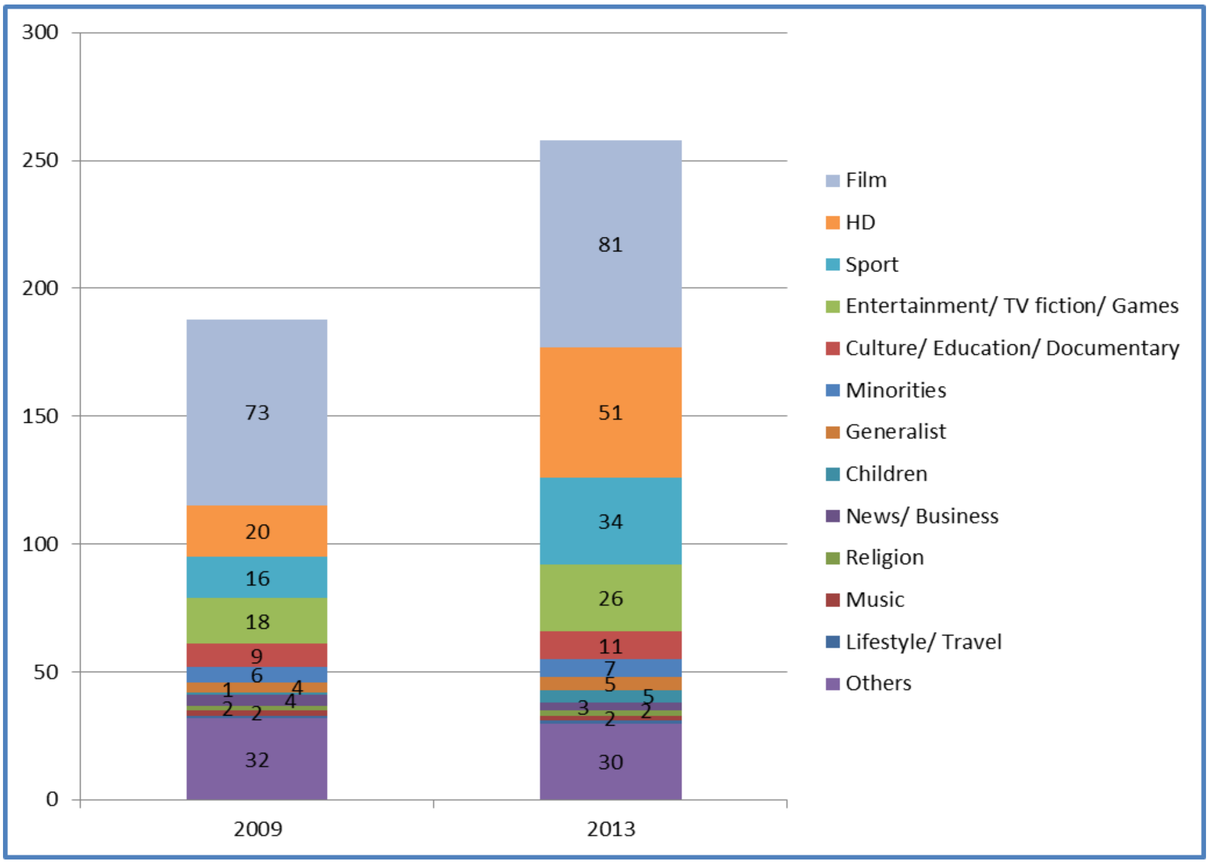


Source: European Audiovisual Observatory

SE – Sweden

- **Number of channels established in Sweden increased by over 1/3:** The total number of channels established in Sweden increased by 37% from 188 in 2009 to 258 in 2013.
- **Film, HD, sport and entertainment most popular genres in Sweden:** The most popular genre of television channels established in Sweden in 2013 were film (total 81), HD (total 51), sport (total 34) and entertainment/ TV fiction/ games channels (total 26).
- **Channel growth driven by popular genres HD, sport, entertainment and film:** The growth in the number of channels was mainly driven by HD (155% increase from 20 to 51), sport (133% increase from 16 to 34), entertainment/ TV fiction/ games (44% increase from 18 to 26) and film channels (11% increase from 73 to 81). In addition, there were more children (+4), culture/ education/ documentary (+2), generalist (+1) and minorities channels (+1) than five years earlier. The number of news/ business channels was reduced from 4 to 3 in the five year period whereas music (2), religion (2) and lifestyle/ travel channels (1) remained unchanged.

Figure 27: Number of linear audiovisual media services established in Sweden by genre in 2009 and 2013



Source: European Audiovisual Observatory

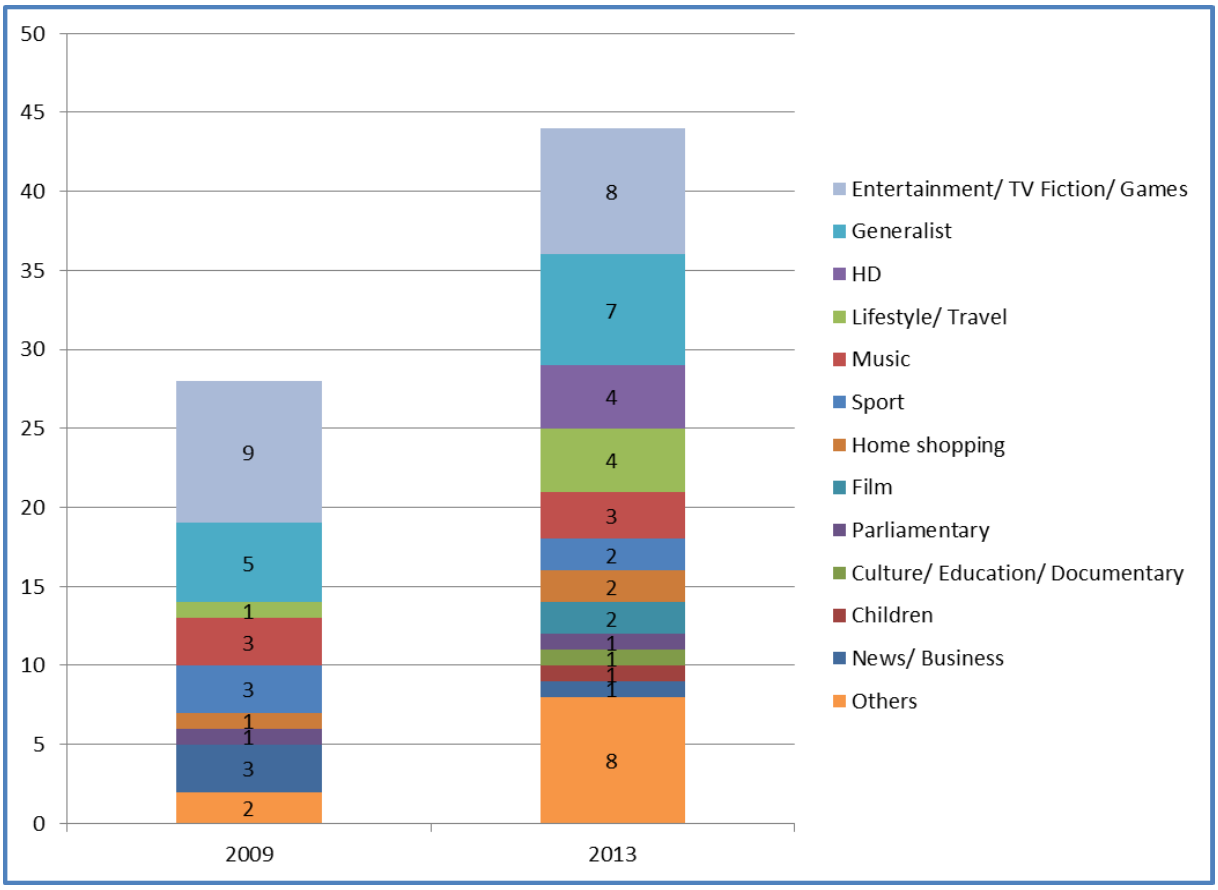
SI – Slovenia

- **Total number of television channels established in Slovenia increased by over 50%:** The total number of television channels established in Slovenia increased by 57% from 28 in 2009 to 44 in 2013.

- **Entertainment, generalist, lifestyle, HD and music among top genres in Slovenia:** The most important genres of channels established in Slovenia in 2013 were entertainment (total 8), generalist (total 7), lifestyle/ travel (total 4), HD (total 4) and music channels (total 3).

- **More HD, lifestyle, film and generalist channels in Slovenia over 5 year period:** In 2013, there were four HD, 2 film, one children's and one culture/ education/ documentary channels established in Slovenia that did not exist five years earlier. In addition, there were more lifestyle (increase from 1 to 4), generalist (increase from 5 to 7) and home shopping channels (increase from 1 to 2) in 2013 than there were in 2009. At the same time, there were fewer entertainment/ TV fiction/ games (-1), sport (-1) and news/ business channels (-2) than five years earlier whereas the number of music and parliamentary channels remained the same.

Figure 28: Number of linear audiovisual media services established in Slovenia by genre in 2009 and 2013

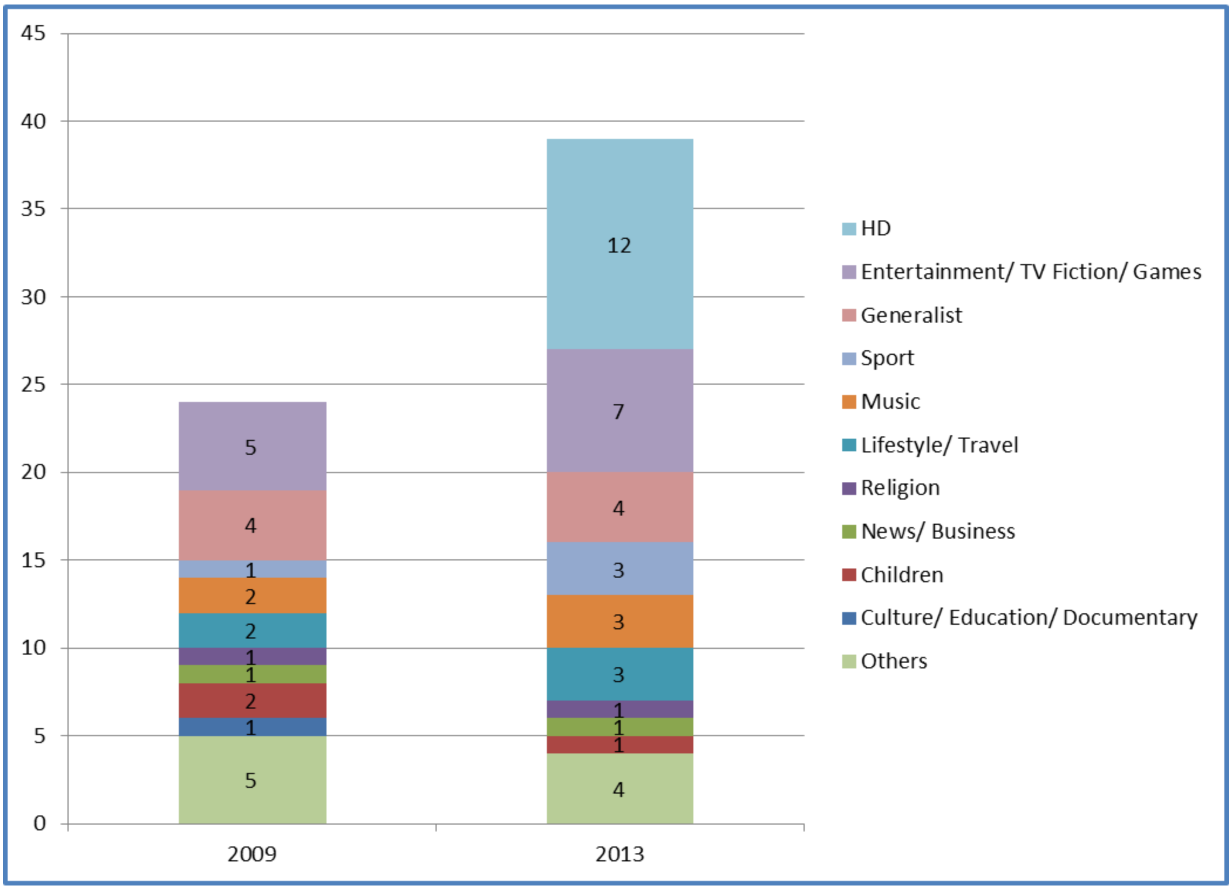


Source: European Audiovisual Observatory

SK – Slovak Republic

- **Total number of channels established in the Slovak Republic up by over 2/3:** The total number of channels established in the Slovak Republic grew by 67% from 24 in 2009 to 40 in 2013.
- **HD, entertainment and generalist among most popular genres in the Slovak Republic:** The most popular genres of channels established in the Slovak Republic in 2013 were HD (total 12), entertainment/ TV fiction/ games (total 7) and generalist (total 4).
- **Channel growth largely driven by hike in HD services:** In 2013, the Slovak Republic had 12 HD television channels that did not exist in 2009. There were also more entertainment/ TV fiction/ games (+2), sport (+2), lifestyle/ travel (+1) and music channels (+1) established in the country than there were five years earlier. At the same time there were fewer children's channels (-1) and the only culture/ education/ documentary channel had disappeared. The number of channels in the genres generalist (4), news/ business (1) and religion (1) remained the same.

Figure 29: Number of linear audiovisual media services established in the Slovak Republic by genre in 2009 and 2013

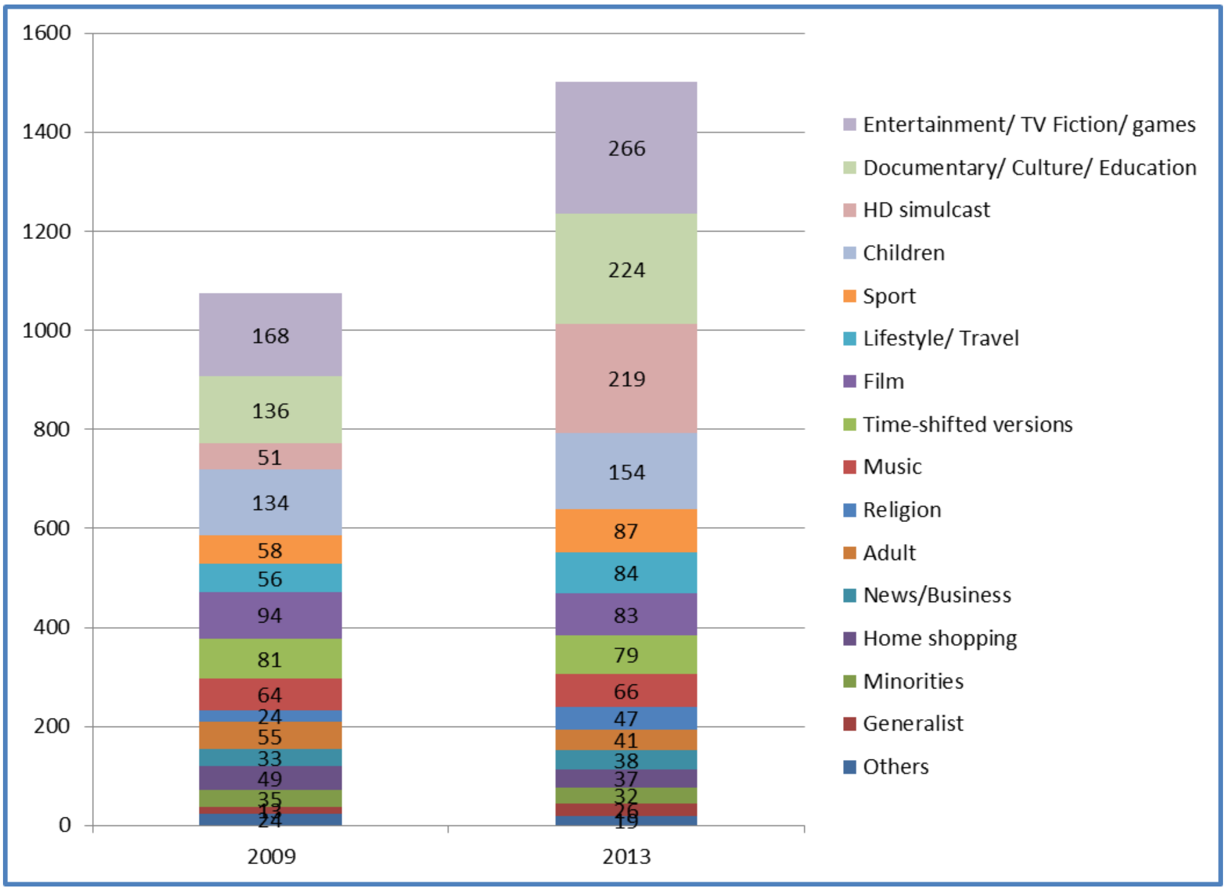


Source: European Audiovisual Observatory

UK – United Kingdom

- **Total number of television channels established in the UK increased by 2/5:** The total number of channels established in the UK grew by 42% from 1075 in 2009 to 1523 in 2013.
- **Entertainment, culture, HD, children and sport top 5 genres in the UK:** The most prominent genres of channels established in the UK in 2013 were entertainment/ TV fiction/ games (total 266), followed by culture/ education/ documentary (total 224), HD (total 219), children (total 154) and sport (total 87).
- **Increase in the number of television channels driven by HD, entertainment and culture:** The growth in the number of channels was mainly driven by HD (329% increase from 51 to 219), culture/ education/ documentary (65% increase from 136 to 224) and entertainment/ TV fiction/ games channels (58% increase from 168 to 266). In addition, there were also more sport (+28), lifestyle/ travel (+28), religion (+23), children (+20), generalist (+13), news/ business (+5) and music channels (+2). At the same time there were fewer adult (-14), home shopping (-12), film (-11), minorities (-3) and time shifted versions of channels (-2) than before.

Figure 30: Number of linear audiovisual media services established in the United Kingdom by genre in 2009 and 2013



Source: European Audiovisual Observatory

1.2.2 Local channels established in the 28 EU Member States

The local media landscape is a very diverse one with numbers of local television channels varying widely from one country to the other. It should be noted that the census of local channels is complicated and in some cases (e.g. Italy, Spain) figures are based on estimates as no official lists exist.

The following sub-section provides an overview of the number of local channels in each EU member state, including the share of those channels in relation to the total number of channels established in each country.

EU member states with a high share of local channels

The following includes a selection of EU member states with the highest share of local services in relation to the total number of services established in the country in 2013.

- **Hungary, Denmark, Spain, Lithuania and Romania were top 5 countries with highest share of local channels:** Hungary was the country with the highest share of local channels in the EU in 2013 (91%). It is followed by Denmark (77%) in second, Spain (69%) in third and Lithuania and Romania (67% each) in fourth and fifth place. Other countries with a high share of local channels included Poland (66%), Greece and Slovakia (64% each), as well as Austria (61%), the Netherlands (55%) and Italy (54%).

In the rest of the EU countries, the share of local channels was below 50%. For a pan-European overview please see table overleaf.

Table 3 : Number of total and local linear audiovisual media services available by country in 2013 + % share of local channels

Country	Total 2013[2]	Local 2013	% Share of local channels
AT	205	126	61%
BE (CFB)	43	13	30%
BE (DSG)	2	0	0%
BE (VLG)	72	12	17%
BE	47	0	0%
BG	199	71	36%
CY	37	3	8%
CZ	309	83	27%
DE	630	202	32%
DK	245	188	77%
EE	17	4	24%
ES	839	583	69%
FI	100	41	41%
FR	694	183	26%
GB	1523	4	0%
GR	212	136	64%
HR	82	24	29%
HU	561	511	91%
IE	21	3	14%
IT	446	522	54%
LT	61	41	67%
LU	71	7	10%
LV	60	24	40%
MT	45	0	0%
NL	493	272	55%
PL	341	224	66%
PT	92	3	3%
RO	205	417	67%
SE	334	76	23%
SI	87	42	48%
SK	110	70	64%
EUR 28 Average	**9326**	**3885**	**42%**

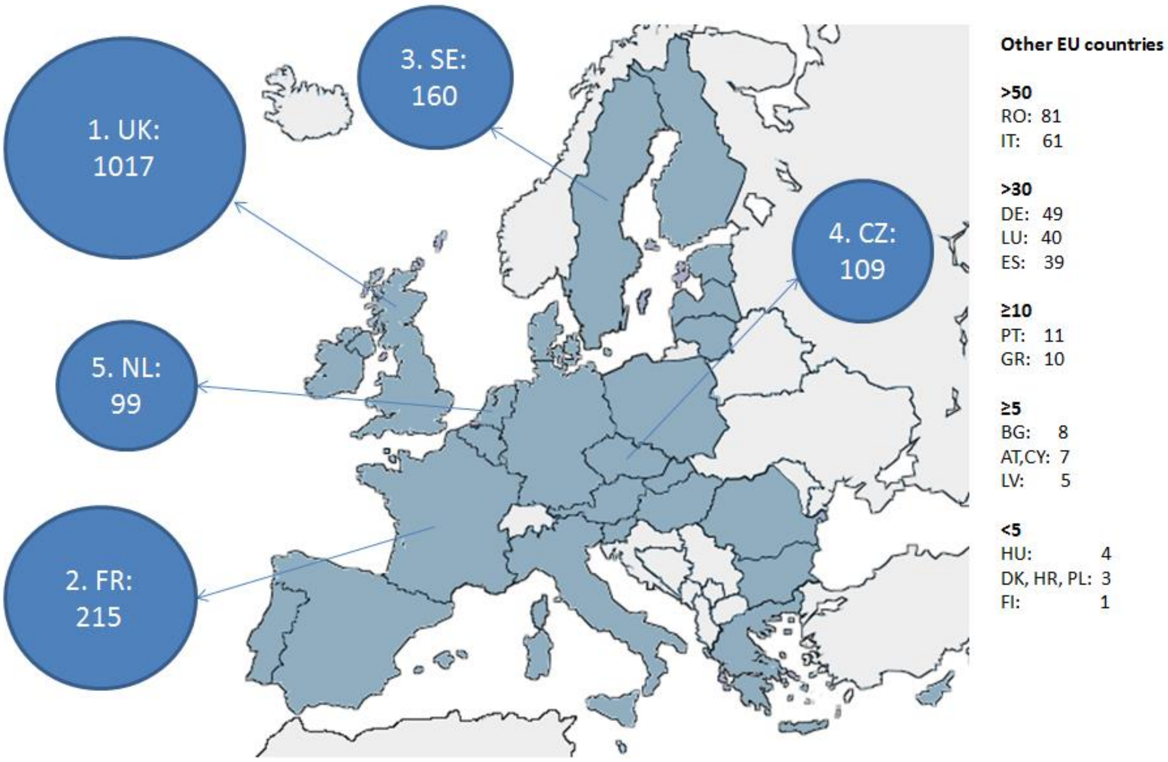
Source: European Audiovisual Observatory

[2] Windows not included

1.2.3 Television channels established in the EU that target other countries

There are a number of important centres for the establishment of television channels in the EU that target other countries. This includes among others the UK, France, Sweden, the Czech Republic and the Netherlands. The factors that facilitate such hubs include economic as well as regulatory aspects. Different national tax regimes in the EU create individual business environments that can be more attractive than in other countries, low levels of legal obligations imposed on operators and different licensing regimes may play a role in the creation of pan-European centres of audiovisual services in EU member states. The chart below maps the number of foreign channels established in the EU that target other markets.

Figure 31: Number of TV channels established in the EU targeting other countries in 2013



Source: European Audiovisual Observatory

The following summarises some important characteristics of the top five countries with the highest number of channels that targeted other countries in the year 2013:

- **A total of 65% of channels established in the UK target other countries:** In the EU, the UK had by far the highest number of channels established in the country (i.e. 1017 channels in 2013) that are broadcasting to a large number of countries in Europe and beyond. This comprises the many linguistic versions of channels by AXN Europe (Sony Pictures), Discovery Communications (e.g. Discovery channel, Animal Planet), National Geographic, Turner Broadcasting (e.g. Boomerang, Cartoon Network, TCN, TNT), Viasat (Modern Times Group), and Walt Disney.

- **Around 1/3 of channels established in France are targeting territories abroad:** Among the EU countries France had the second highest number of channels (i.e. 215) established in the country that target other countries. A total of 31% of channels established in France are directed at other national markets in the EU and Turkey. This includes, for example, the linguistic versions of Euronews and those of Eurosport (Discovery Communications).

- **Swedish channels mainly target Nordic and Baltic states:** Sweden comes in third place with regard to the number of television channels that target other countries (i.e. 160 channels). Almost half of the channels established in Sweden (48%) are aimed at other markets, mainly other Nordic and the Baltic States. They include the numerous linguistic versions of channels by C More Entertainment (Bonnier Group) and TV1000 (Modern Times Group).

- **The Czech Republic's pan-European channels mainly target Central and South Eastern Europe:** In a pan-European comparison, the Czech Republic holds the 4th place of countries with the highest number of channels that target other markets (i.e. 109 channels). A total of 35% of channels established in the Czech Republic target other countries. These are pan-European brand channels that mainly target Central and South Eastern Europe. They include various language versions of channels by HBO (Time Warner) and Walt Disney.

- **A total of 20% of channels established in the Netherlands are targeting other national markets:** A total of 1/5 of channels (i.e. 99 channels) that are established in the Netherlands is targeting other countries and most of these were adult channels.

- **5 other EU countries with more than 30 television channels targeting other territories:** Romania (81 channels mainly targeting Central and South Eastern Europe), Italy (61 channels, including a number of language versions of channels by 21st Century Fox), Germany (49 channels, including services targeted at Austria and Switzerland and different language versions of Da Vinci Learning and Bertelsmann channel Auto Motor Sport), Luxembourg (40 channels mainly by the RTL Group targeted at the Netherlands and Belgium) and Spain (39 channels most of which are targeting Portugal) are another group of countries with a significant number of television services that target other markets.

The following table provides an overview of the number of television channels targeting foreign countries for the period from 2009 to 2013 and the percent point difference from the year 2013 vs. 2009.

Table 4: Number of linear audiovisual media services targeting foreign countries 2009-2013

Country	2009	2010	2011	2012	2013	2013 vs. 2009
AT	5	4	4	4	7	40%
BE (CFB)	1	0	0	0	0	-100%
BE (DSG)	0	0	0	0	0	N/A
BE (VLG)	2	1	5	5	0	-100%
BE (1)	46	46	46	47	47	2%
BG	0	0	0	2	8	100%
CY	7	7	4	7	7	0%
CZ	47	58	68	82	109	132%
DE	28	32	38	40	49	75%
DK	2	4	4	3	3	50%
EE	0	0	0	0	0	N/A
ES	22	25	30	35	39	77%
FI	0	1	1	2	1	100%
FR	88	128	131	138	215	144%
GB	487	588	738	824	1017	109%
GR	10	10	12	12	10	0%
HR	0	0	1	1	3	100%
HU	4	3	3	3	4	0%
IE	1	1	0	0	0	-100%
IT	50	48	50	50	61	22%
LT	0	0	0	0	0	N/A
LU	30	36	36	37	40	33%
LV	2	5	5	5	5	150%
MT	0	0	0	10	10	100%
NL	61	83	88	95	99	62%
PL	3	3	3	3	3	0%
PT	9	11	11	11	11	22%
RO	22	33	39	50	81	268%
SE	85	98	104	130	160	88%
SI	0	0	0	0	0	N/A
SK	0	0	0	1	0	N/A
EUR 28	**1012**	**1225**	**1421**	**1597**	**1989**	**97%**

Source: European Audiovisual Observatory

1.3 Trends in the circulation of linear audiovisual media services available in the 28 EU member states

The scope and scale of the circulation of audiovisual media services in the EU depend on a number of factors. On the one side they tend to be influenced by the size and wealth of a country and on the other side by factors such as spectrum allocation, ownership structures and funding schemes. The first and latter are managed by governments and as a result, different national policy decisions have created a diverse set of distinct broadcasting systems in the EU. These unique features have also influenced the economic characteristics of the broadcasting markets all of which play part in explaining the sometimes significant differences that occur between EU countries.

The following sub-section provides an overview of the supply of television channels that are available in the 28 EU countries and summarises the key trends.

1.3.1 Mapping the circulation of linear services available in the EU

Key trends

In order not to distort the figures for the total number of services available in a country local channels and windows were excluded from the table below. Hence, the following analysis is based on national and bigger regional channels.

Pan-European trends

The following summarises the most important findings:

- **The majority of TV channels available on average in a given country are foreign channels:** In 2013, the share of foreign channels available was 50% and higher in 24 EU countries[3]; in four countries (DE, ES, IT, GB) the share of foreign channels was less than 40% of the total number of channels available.

- **The share of foreign channels remained stable between 2009 and 2013:** The share of foreign channels available in the 28 EU countries remained relatively stable in the great majority of countries (24 countries with a variation of +/- 10 percent point difference). Countries that registered further increases included Slovenia (+19), Slovakia (+16), Austria (+12) and Hungary (+11). The two countries that hat a slightly lower share of foreign channels were Greece (-13) and the Czech Republic (-16).

- **The growth in the number of channels available in a country is driven half by the growth of national channels and half by the growth of foreign channels:** In 12 EU countries and the three Communities of Belgium the growth of channels available in a country is driven by foreign channels. In 14 EU countries the growth is largely driven by national channels. The UK experienced a decrease in both categories.

- **The number of television channels available varied greatly from one country of the EU to another:** In 2013, France had over 700 linear audiovisual services available in the country via

[3] Separate figures available for the Flemish, French and German-speaking Communities of Belgium

the major national distribution platforms (e.g. DTT, cable, satellite, IPTV) whereas Greece had around 160 services available.

- **France, Germany, the UK and Italy had the highest number of channels available in the country:** In 2013, France (712), Germany (665), the UK (584) and Italy (543) had the highest number of services available in the country; the smallest numbers of channels were available in Greece (164) and Malta (183).

- **In over 40% of EU countries people were able to watch between 300 and 500 television channels:** In 12 EU countries and the French and German-speaking Communities of Belgium people were able to watch between ca. 300 and around 500 television channels in 2013.

- **Growth in the number of television services available in the EU:** The number of television channels that were available in a country increased in all but three EU countries (SK, GB, IE) in the period from 2009 to 2013.

The following table provides a general overview of the total number of television channels[4] available by country in 2009 and 2013 and shows the percent point difference between 2013 vs. 2009. In addition, the table includes data on the total number and share of foreign channels available by country. Foreign channels are those that do not hold a license from the regulatory authority of a given country.

Table 5 : Number of linear audiovisual media services available by country and share of foreign channels 2009 - 2013

Country	2009			2013			2013 vs. 2009
	Total[1]	Foreign	% Share of foreign channels	Total	Foreign	% Share of foreign channels	Change in % share foreign channels
AT	290	212	73%	473	403	85%	12
BE (CFB)	310	281	91%	459	427	93%	N/A
BE (DSG)	335	333	99%	439	437	100%	2
BE (VLG)	461	405	88%	542	482	89%	0
BE (1)	N/A	N/A	N/A	15	15	100%	1
BG	225	152	68%	388	269	69%	2
CY	159	134	84%	192	166	86%	2
CZ	247	200	81%	326	213	65%	-16
DE	462	218	47%	665	246	37%	-10
DK	231	201	87%	278	224	81%	-6
EE	251	240	96%	342	329	96%	1
ES	356	100	28%	431	150	35%	7
FI	218	184	84%	284	228	80%	-4
FR	532	325	61%	712	427	60%	-1
GB	660	56	8%	584	47	8%	0
GR	140	105	75%	164	101	62%	-13
HR	143	100	70%	377	306	81%	11
HU	217	181	83%	273	221	81%	-2
IE	551	542	98%	475	459	97%	-2
IT	469	101	22%	543	143	26%	5
LT	239	225	94%	329	309	94%	0
LU	258	248	96%	490	478	98%	1
LV	172	159	92%	270	239	89%	-4
MT	123	95	77%	183	138	75%	-2
NL	377	276	73%	464	321	69%	-4
PL	281	210	75%	531	417	79%	4
PT	242	193	80%	304	226	74%	-5
RO	219	120	55%	283	144	51%	-4
SE	273	179	66%	292	176	60%	-5
SI	173	121	70%	402	358	89%	19
SK	241	161	67%	233	192	82%	16

[1] local channels and windows not included

Source: European Audiovisual Observatory

[4] Local channels are not included.

1.3.2 Share of foreign channels available per country

The following section examines the developments in the number of channels available in the 28 EU member states by comparing figures for national and foreign channels from 2009 to those in 2013.

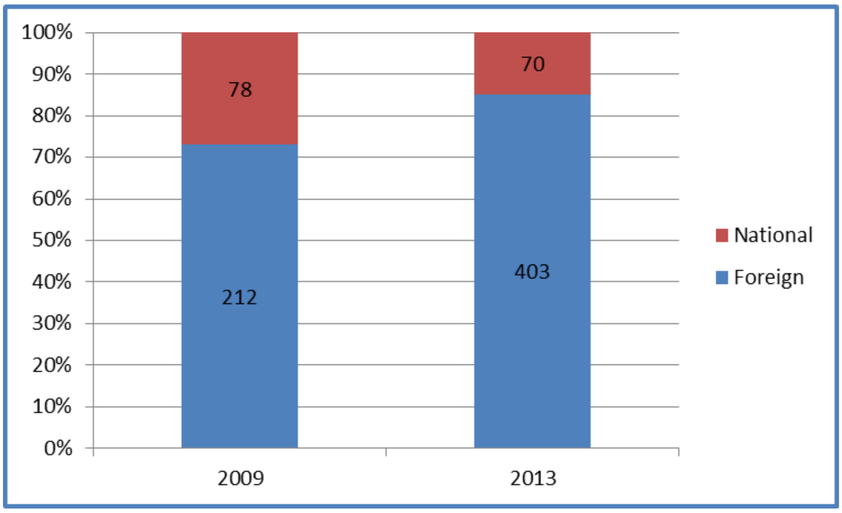
Foreign channels are those that do not hold a license from the national regulatory authority of a given country.

Please note that the figures below do not include local channels or windows. Free to air channels on satellite have been counted only in their country of establishment, even if they are in practice, available in most European countries.

AT - Austria

- The share of foreign channels in Austria increased to more than 4/5 (73% in 2009 and 85% in 2013).

Figure 32 : AT - share of foreign channels in 2009 and 2013

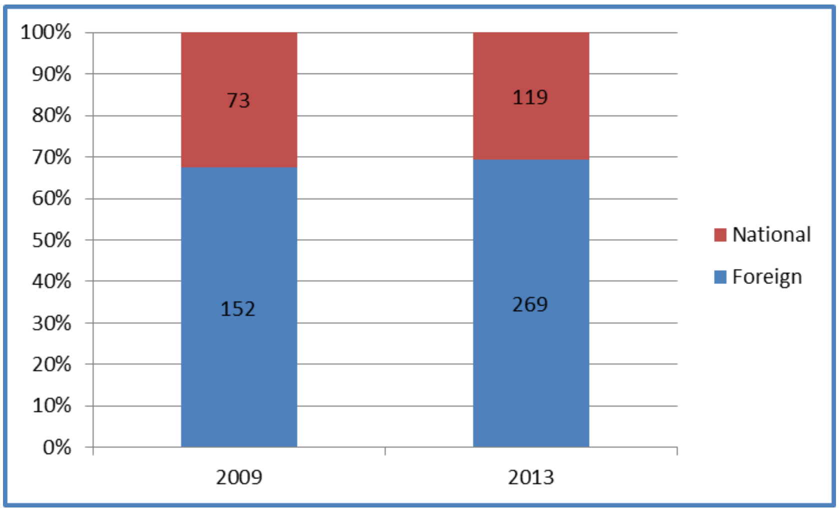


Source: European Audiovisual Observatory

BG - Bulgaria

- The share of foreign channels in Bulgaria remained stable at around 70% (68% in 2009 and 69% in 2013).

Figure 33 : BG - share of foreign channels in 2009 and 2013

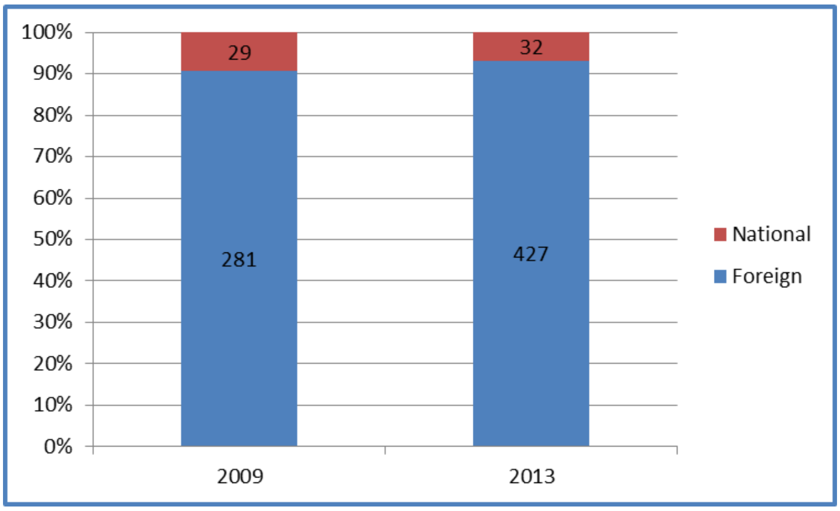


Source: European Audiovisual Observatory

BE - CFB

- The share of foreign channels in the French Community of Belgium remained high at over 90% (91% in 2009 and 93% in 2013).

Figure 34 : BE - CFB - share of foreign channels in 2009 and 2013

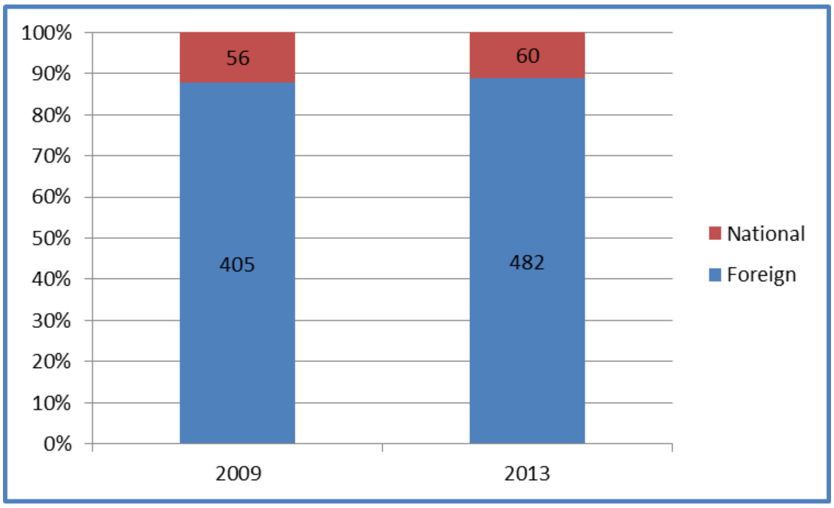


Source: European Audiovisual Observatory

BE - VLG

- The share of foreign channels in the Flemish Community of Belgium remained high at around 90% (88% in 2009 and 89% in 2013).

Figure 35 : BE - VLG - share of foreign channels in 2009 and 2013

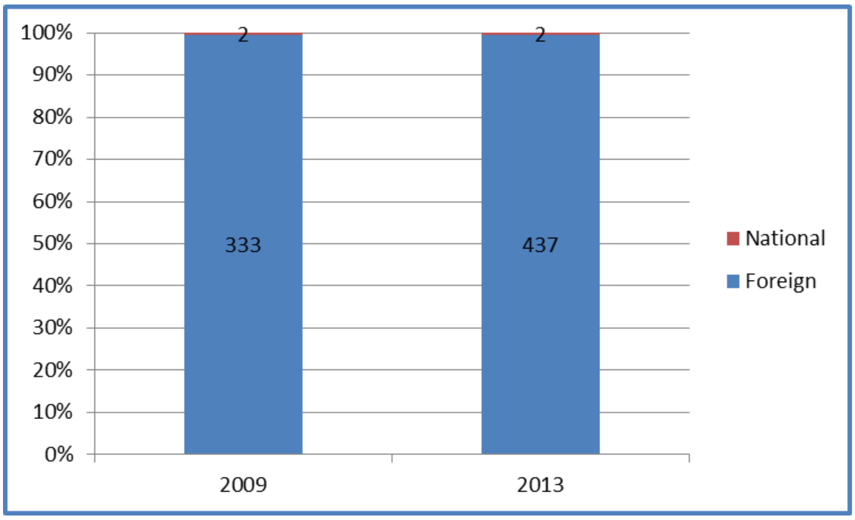


Source: European Audiovisual Observatory

BE - DSG

- Almost all channels available in the German-speaking Community of Belgium were foreign.

Figure 36 : BE - DSG - share of foreign channels in 2009 and 2013

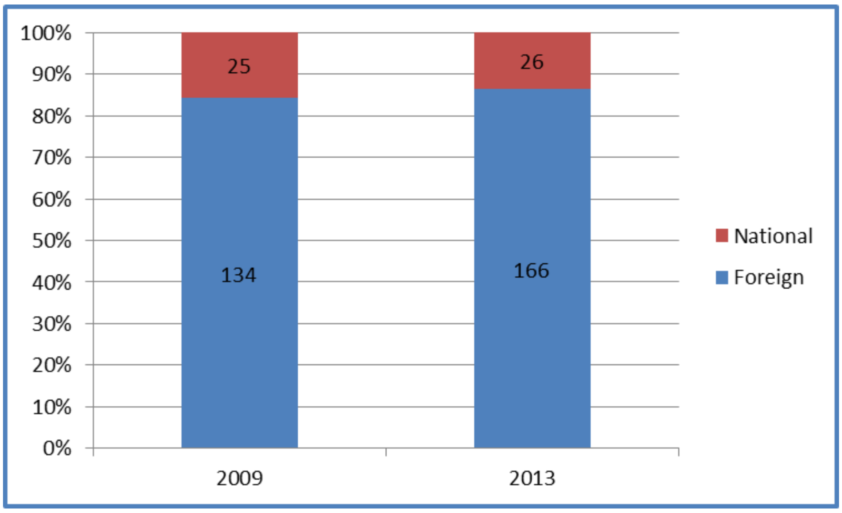


Source: European Audiovisual Observatory

CY - Cyprus

- The share of foreign channels available in Cyprus remained stable at over 4/5 (84% in 2009 and 86% in 2013).

Figure 37 : CY - share of foreign channels in 2009 and 2013

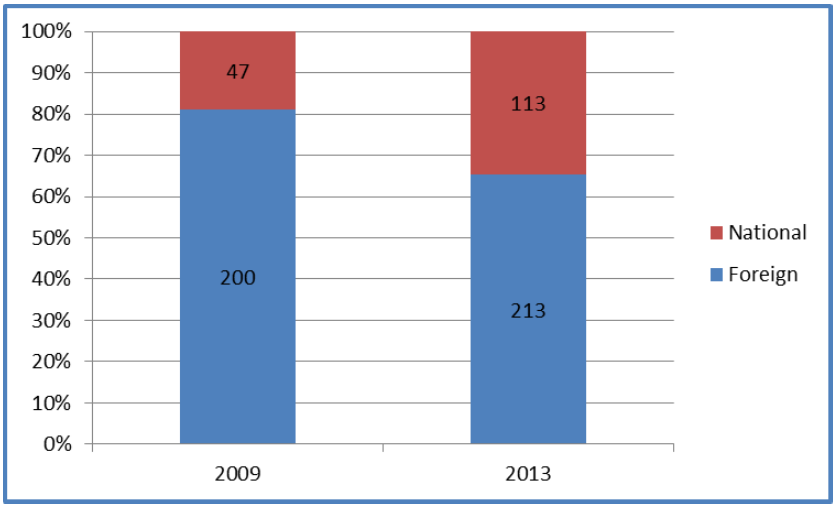


Source: European Audiovisual Observatory

CZ – Czech Republic

- The share of foreign channels available in the Czech Republic decreased over time from 4/5 to 2/3 (81% in 2009 and 65% in 2013).

Figure 38 : CZ - share of foreign channels in 2009 and 2013

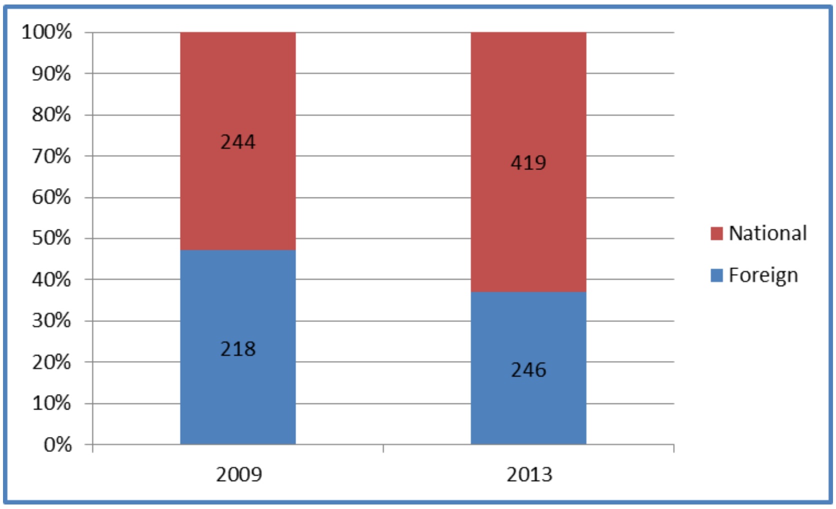


Source: European Audiovisual Observatory

DE – Germany

- The share of foreign channels available in Germany decreased from almost half to 1/3 (47% in 2009 and 37% in 2013).

Figure 39 : DE - share of foreign channels in 2009 and 2013

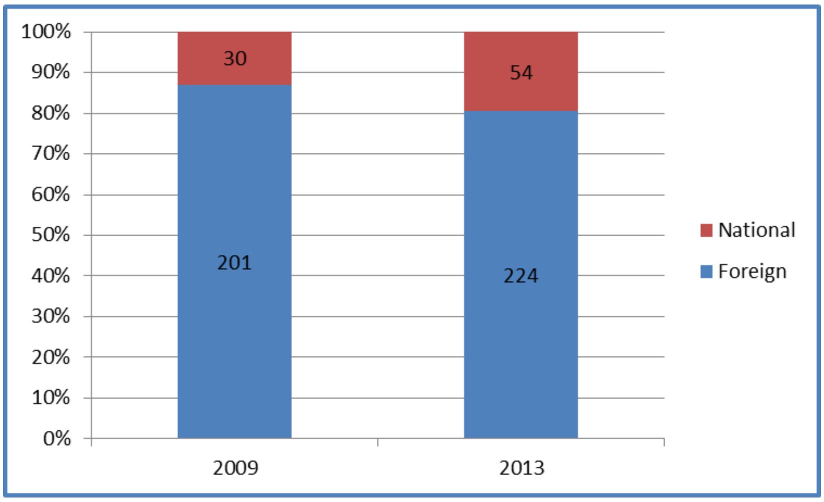


Source: European Audiovisual Observatory

DK – Denmark

- The share of foreign channels available in Denmark remained relatively stable at 87% in 2009 and 81% in 2013).

Figure 40 : DK - share of foreign channels in 2009 and 2013

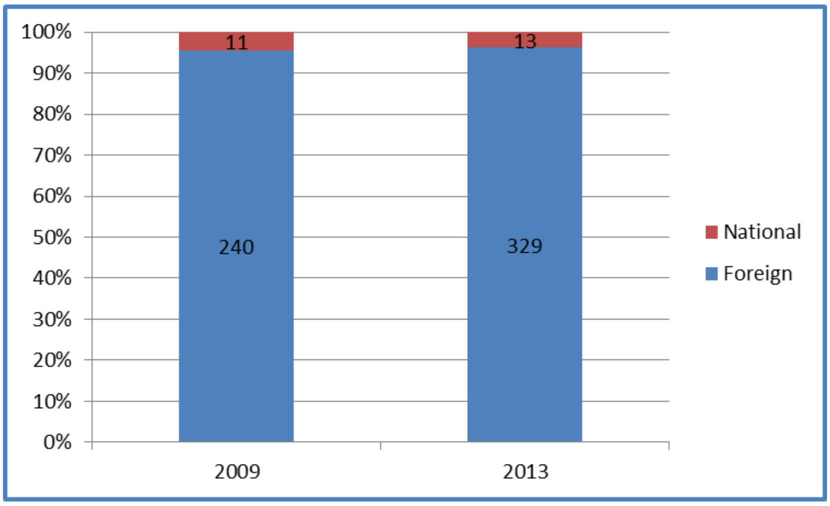


Source: European Audiovisual Observatory

EE – Estonia

- The share of foreign channels available in Estonia remained high at over 90% (96% in 2009 and 2013).

Figure 41 : EE - share of foreign channels in 2009 and 2013

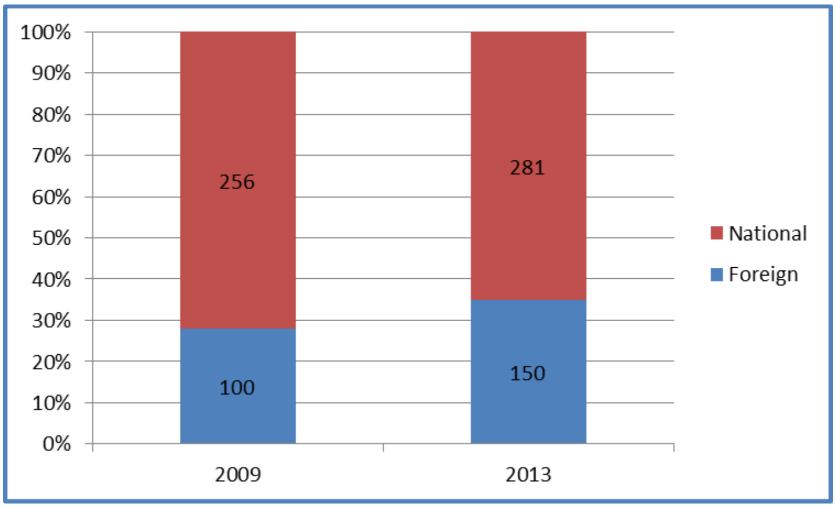


Source: European Audiovisual Observatory

ES – Spain

- There were significantly more national channels available in Spain than foreign ones (1/3) (slight increase from 28% in 2009 to 35% in 2013).

Figure 42 : ES - share of foreign channels in 2009 and 2013

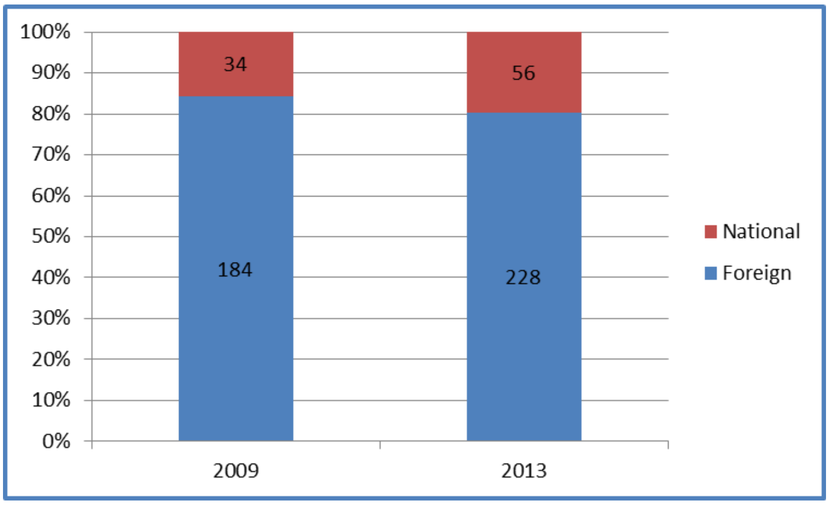


Source: European Audiovisual Observatory

FI – Finland

- The share of foreign channels available in Finland remained stable at over 4/5 (84% in 2009 and 80% in 2013).

Figure 43 : FI - share of foreign channels in 2009 and 2013

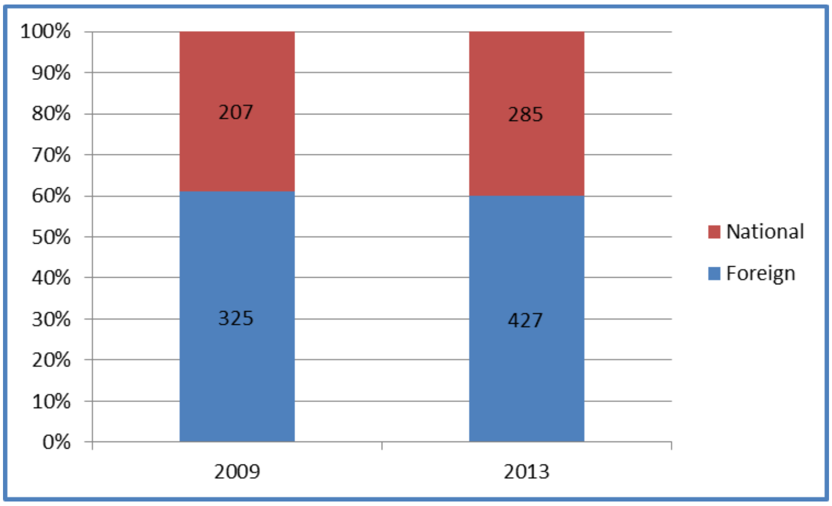


Source: European Audiovisual Observatory

FR – France

- The Share of foreign channels available in France remained stable at 61% in 2009 and 60% in 2013.

Figure 44 : FR - share of foreign channels in 2009 and 2013

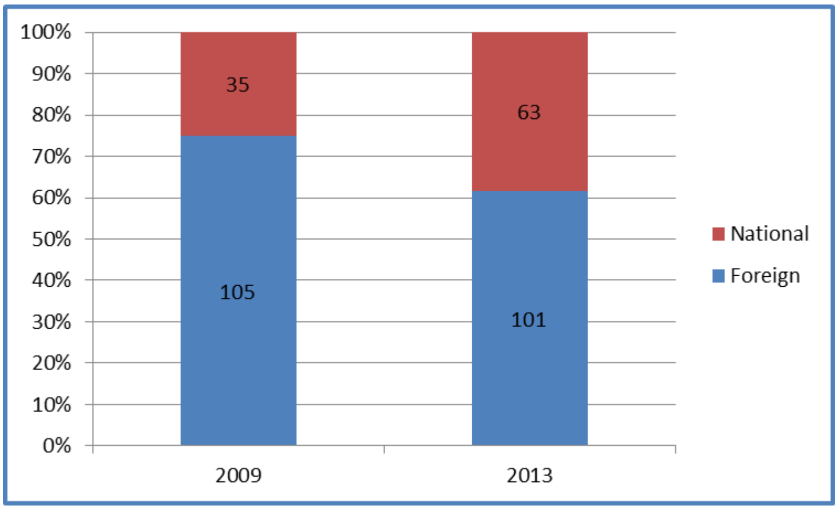


Source: European Audiovisual Observatory

GR – Greece

- The Share of foreign channels available in Greece dropped from 75% in 2009 to 62% in 2013.

Figure 45 : GR - share of foreign channels in 2009 and 2013

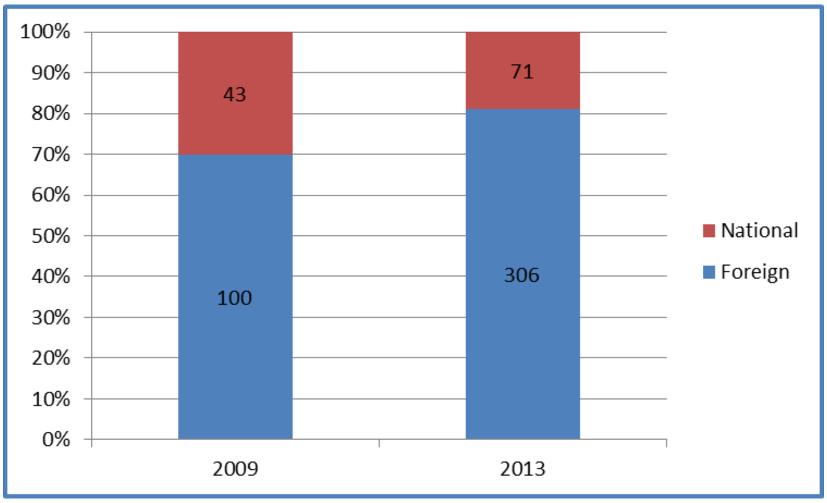


Source: European Audiovisual Observatory

HR – Croatia

- The share of foreign channels available in Croatia increased from 70% in 2009 to 81% in 2013.

Figure 46 : HR - share of foreign channels in 2009 and 2013

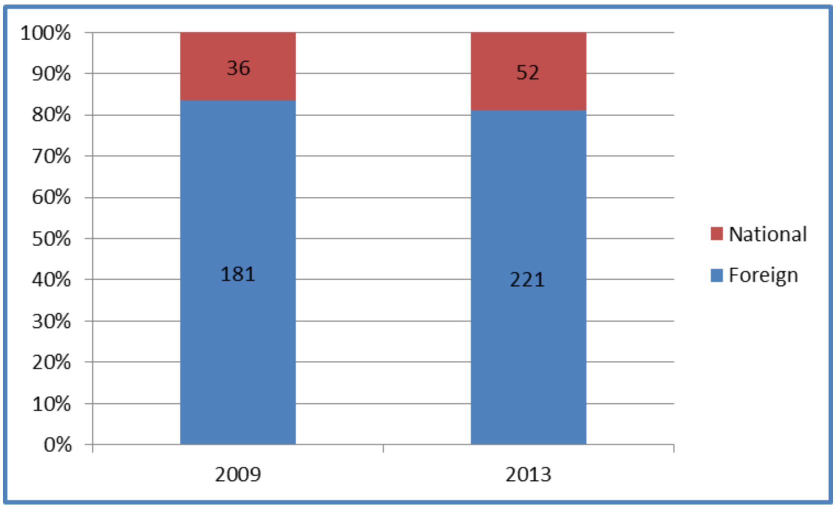


Source: European Audiovisual Observatory

HU – Hungary

- The share of foreign channels available in Hungary remained stable at 83% in 2009 and 81% in 2013.

Figure 47 : HU - share of foreign channels in 2009 and 2013

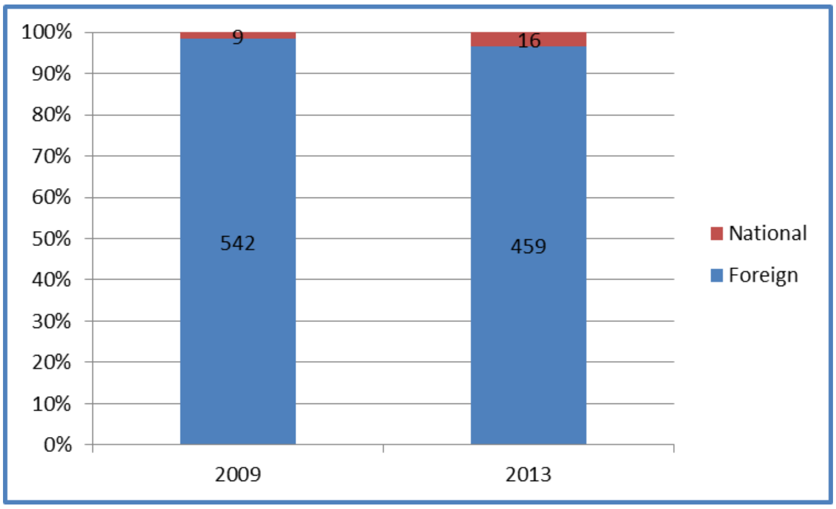


Source: European Audiovisual Observatory

IE – Ireland

- The share of foreign channels available in Ireland remained high at almost 100% (98% in 2009 and 97% in 2013).

Figure 48 : IE - share of foreign channels in 2009 and 2013

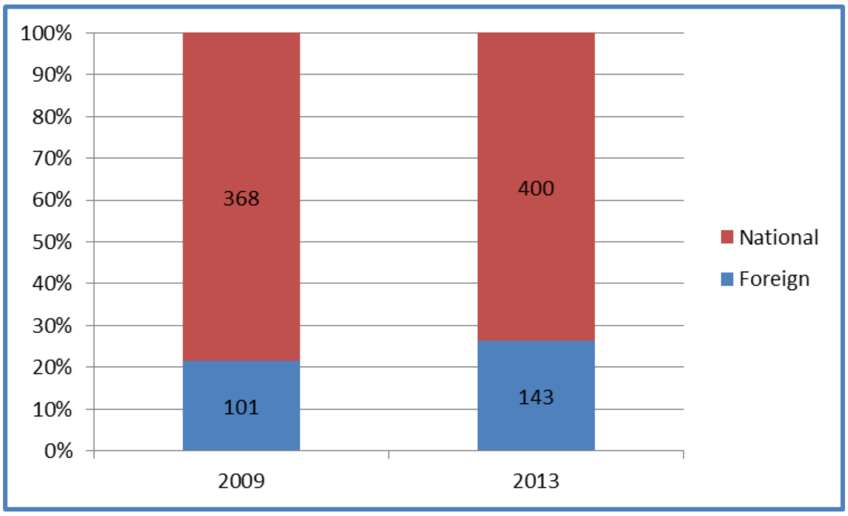


Source: European Audiovisual Observatory

IT – Italy

- There were significantly more national channels available in Italy than foreign ones (slight increase from 22% in 2009 to 26% in 2013).

Figure 49 : IT - share of foreign channels in 2009 and 2013

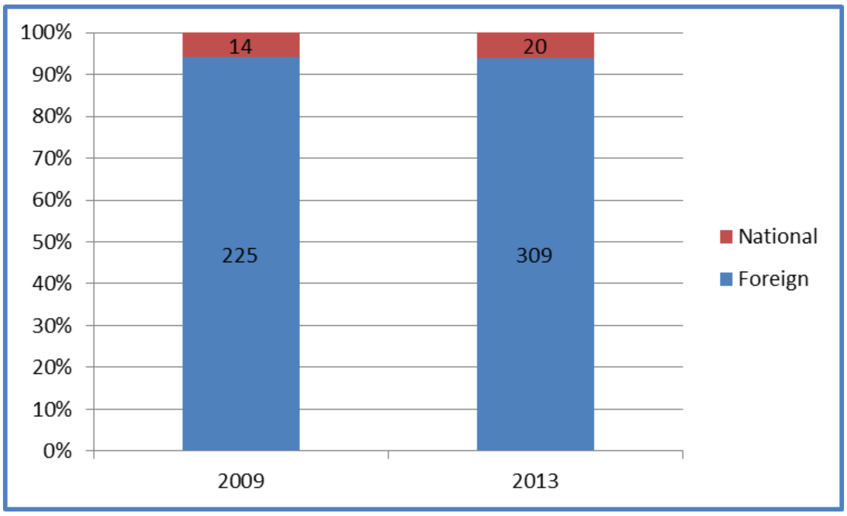


Source: European Audiovisual Observatory

LT – Lithuania

- The share of foreign channels available in Lithuania remained high at 94% in 2009 and 2013.

Figure 50 : LT - share of foreign channels in 2009 and 2013

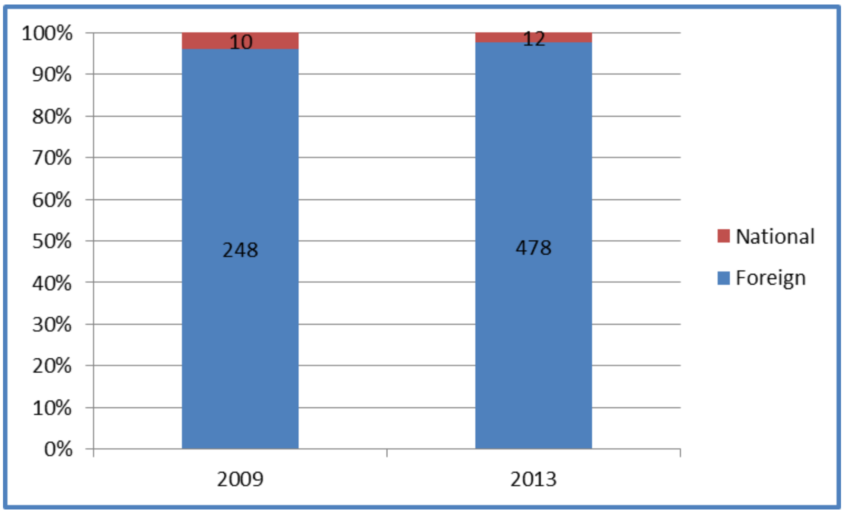


Source: European Audiovisual Observatory

LU – Luxembourg

- Almost all channels available in Luxembourg were foreign (96% in 2009 and 98% in 2013).

Figure 51 : LU - share of foreign channels in 2009 and 2013

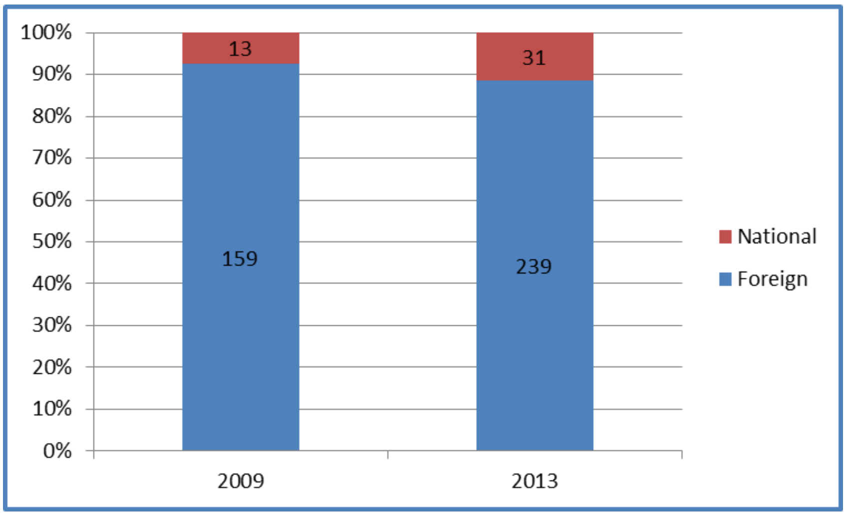


Source: European Audiovisual Observatory

LV – Latvia

- The share of foreign channels available in Latvia remained high at 92% in 2009 and 89% in 2013.

Figure 52 : LV - share of foreign channels in 2009 and 2013

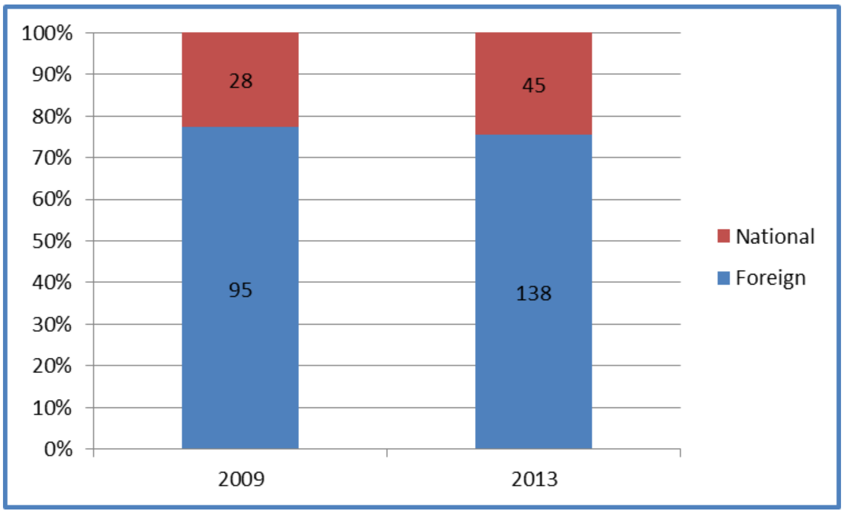


Source: European Audiovisual Observatory

MT – Malta

- The share of foreign channels available in Malta remained stable at 77%% in 2009 and 75% in 2013.

Figure 53 : MT - share of foreign channels in 2009 and 2013

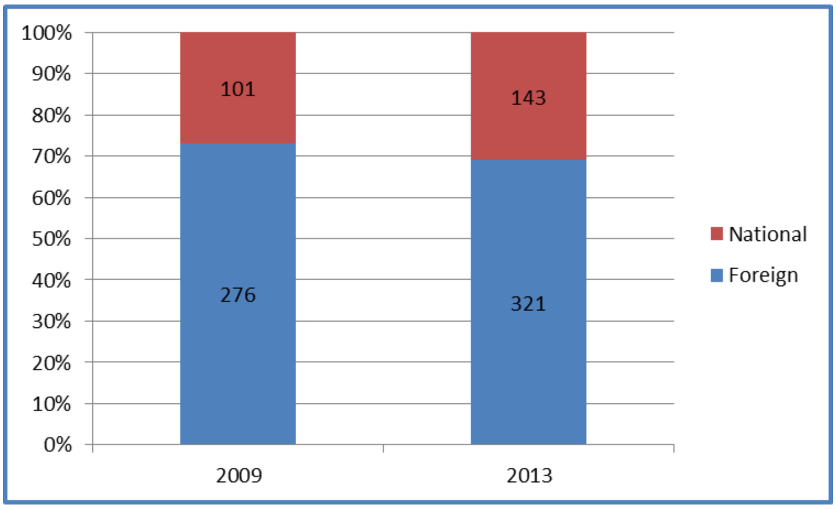


Source: European Audiovisual Observatory

NL – Netherlands

- The share of foreign channels available in the Netherlands remained relatively stable and decreased slightly from 73% in 2009 to 69% in 2013.

Figure 54 : NL - share of foreign channels in 2009 and 2013

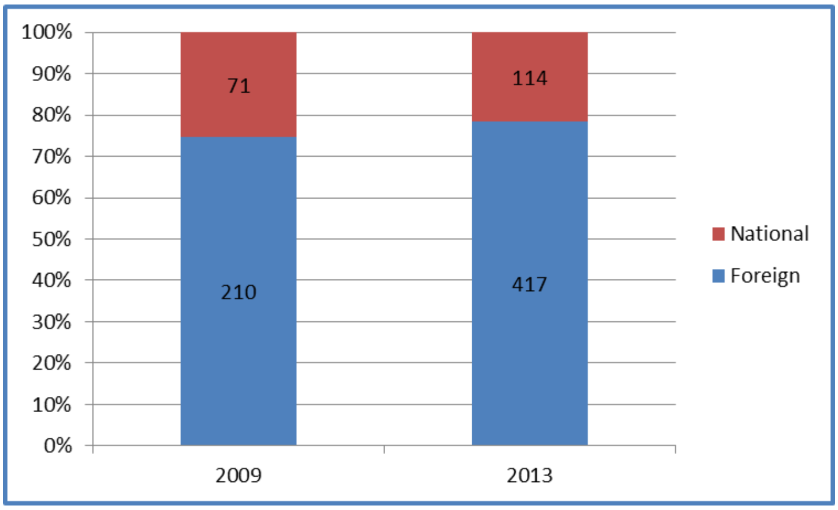


Source: European Audiovisual Observatory

PL – Poland

- The share of foreign channels available in Poland remained significant at around 4/5 (slight increase from 75% in 2009 to 79% in 2013).

Figure 55 : PL - share of foreign channels in 2009 and 2013

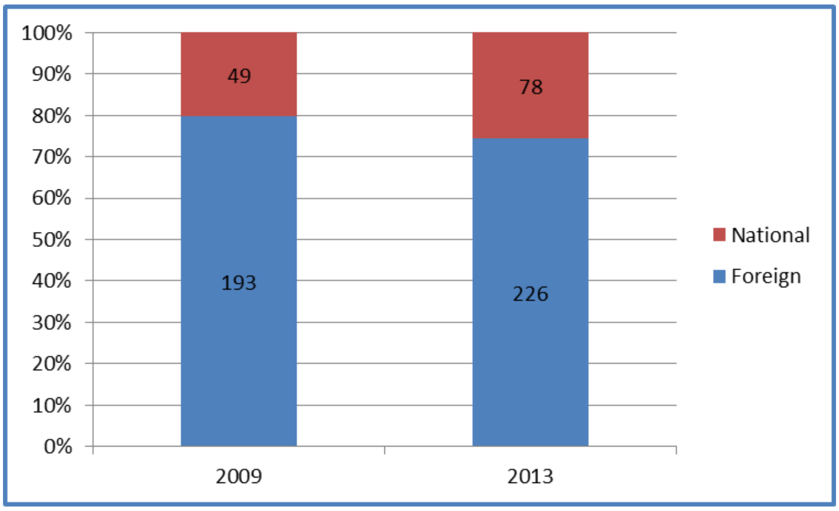


Source: European Audiovisual Observatory

PT – Portugal

- The share of foreign channels available in Portugal remained at around 4/5 (80% in 2009 and 74% in 2013).

Figure 56 : PT - share of foreign channels in 2009 and 2013

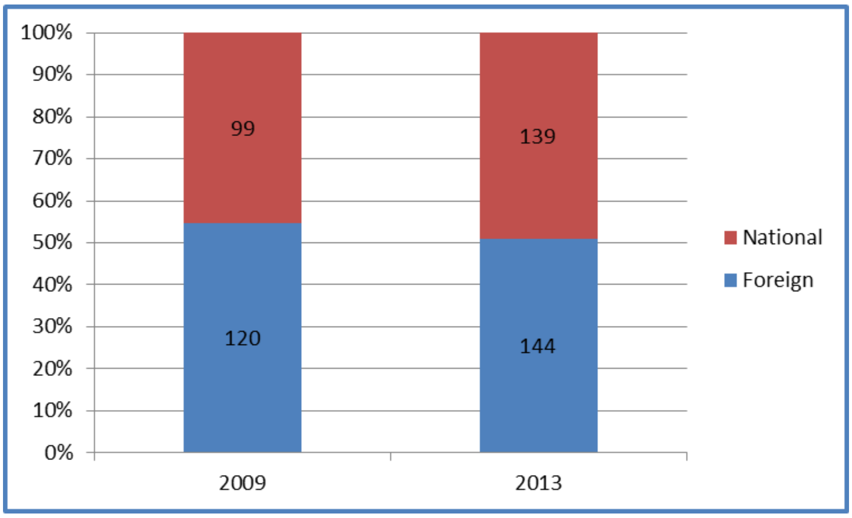


Source: European Audiovisual Observatory

RO – Romania

- Half of the channels available in Romania are foreign (55% in 2009 and 51% in 2013).

Figure 57 : RO - share of foreign channels in 2009 and 2013

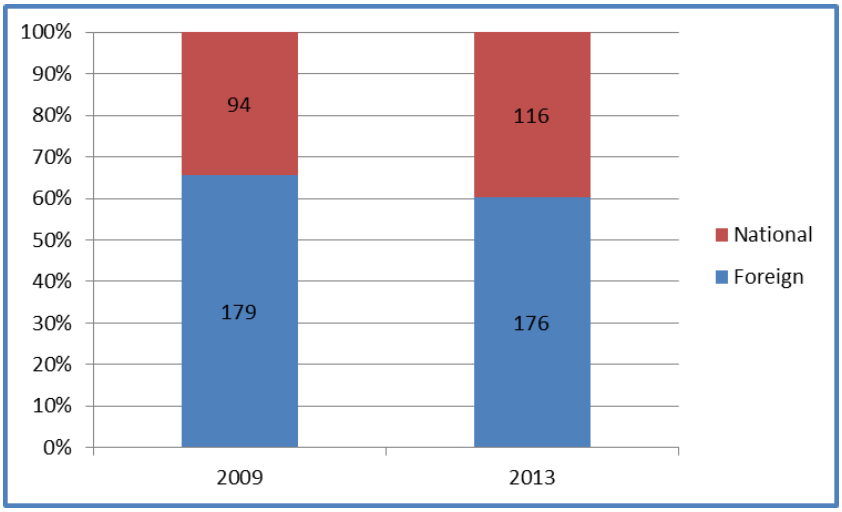


Source: European Audiovisual Observatory

SE – Sweden

- The share of foreign channels available in Sweden remained stable at around 2/3 (66% in 2009 and 60% in 2013).

Figure 58 : SE - share of foreign channels in 2009 and 2013

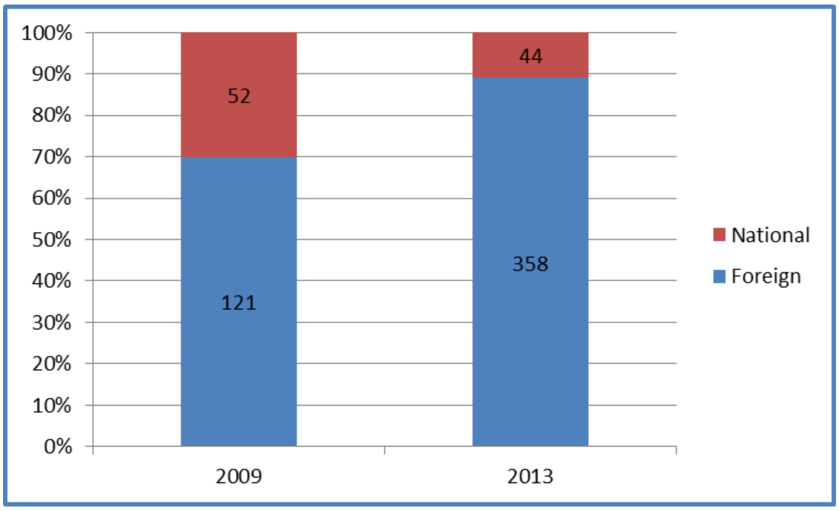


Source: European Audiovisual Observatory

SI – Slovenia

- The share of foreign channels available in Slovenia increased significantly from 70% in 2009 to 89% in 2013.

Figure 59 : SI - share of foreign channels in 2009 and 2013

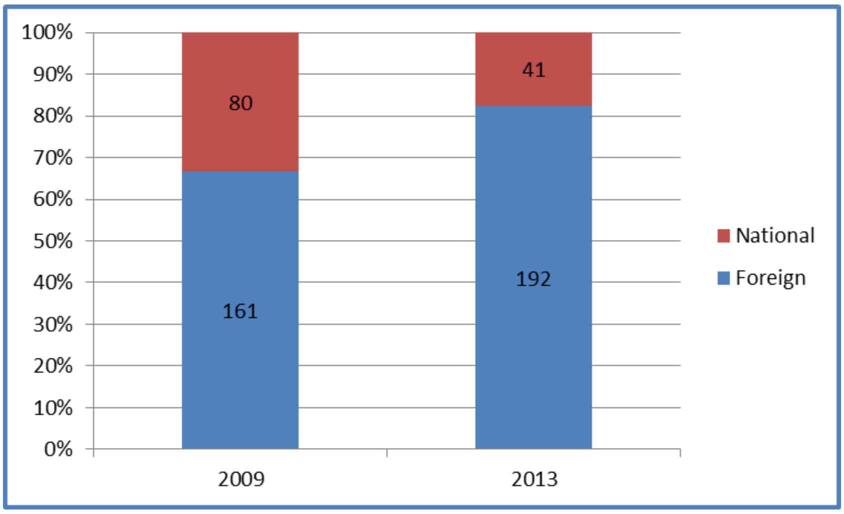


Source: European Audiovisual Observatory

SK – Slovakia

- Share of foreign channels available in Slovakia increased from 67% in 2009 to 82% in 2013.

Figure 60: SK - share of foreign channels in 2009 and 2013

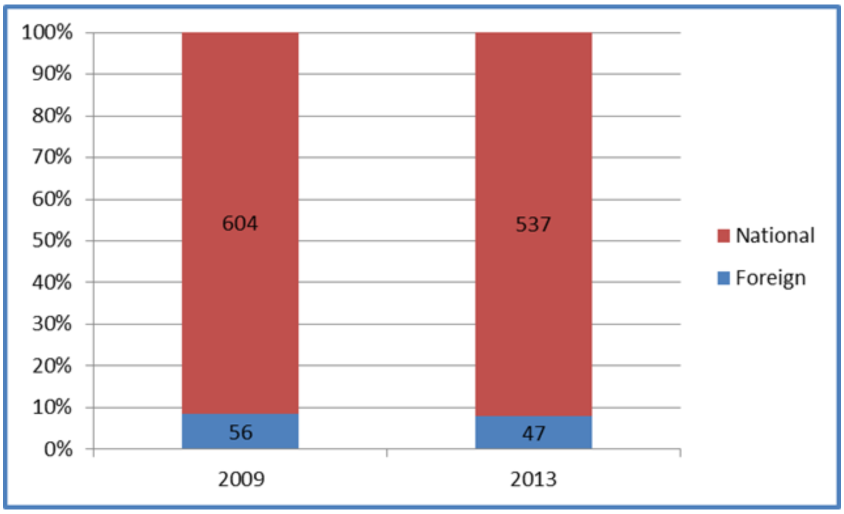


Source: European Audiovisual Observatory

UK – United Kingdom

- Great majority of channels available in the UK were national with only a marginal part (8%) foreign in 2009 and 2013.

Figure 61 : UK - share of foreign channels in 2009 and 2013



Source: European Audiovisual Observatory

1.3.3 Foreign channels targeting a country

Following an analysis of the share of foreign channels that are available in a country, this section focuses on a subset of those foreign channels that clearly target a country. The indicator used in the MAVISE database to signify that a channel is specifically targeting another country is when the service broadcasts in the national language of the country.

Please note that the data below does not include local channels or windows.

EU member states with a high number of foreign TV channels targeting the country

The following provides an overview of those countries with a high number of foreign channels targeting their territories and some key trends.

- **The number of foreign channels targeting a country varies widely between EU member states:** In 2013, Poland had 109 foreign television channels targeting its territory Whereas Malta had 4 linear services targeting the country; Luxembourg and the Flemish and German-speaking Communities of Belgium had no foreign TV channels targeting their territories.

- **Poland, Austria and Hungary are countries with highest number of foreign channels targeting their territories:** These three countries had the highest number of foreign channels available in their territories (>100) in 2013.

- **Over 2/5 of EU countries have been targeted by more than 50 foreign channels:** 12 EU countries had 50+ channels targeting their territories; five EU countries (HR, ES, IE, IT GR) had between 25 and 45 and another set of countries (CY, GB, EE, LT, LV) had between 10 and 14 foreign channels targeting their territories.

- **¼ of EU countries had an increase of foreign channels that target their territories greater than 100% in 5 years since 2009:** Seven EU countries (AT, SK, IE, HR, SI, BG, MT) had an increase of foreign channels of more than 100% in the time period from 2009 to 2013; the majority of counties (16 countries) had significant increases in the number of foreign channels targeting them ranging from 17% to 95%; Estonia and the UK had fewer channels targeting their territories in 2013 than in 2009.

The table below provides an overview of the number of foreign channels that target EU territories.

Table 6 : Number of foreign channels targeting EU countries + total 2013 vs. 2009

Country	2009			2013			Total 2013 vs. 2009
	Public	Private	Total	Public	Private	Total	
AT	0	5	5	5	103	108	2060%
BE (1)	0	4	4	0	5	5	25%
BE (CFB)	0	4	4	0	5	5	25%
BE (DSG)	0	0	0	0	0	0	N/A
BE (VLG)	0	0	0	0	0	0	N/A
BG	0	25	25	2	48	50	100%
CY[1]	1	7	8	2	12	14	75%
CZ	0	30	30	2	51	53	77%
DE	2	73	75	5	77	82	9%
DK	2	47	49	2	67	69	41%
EE	2	12	14	2	10	12	-14%
ES	3	29	32	3	39	42	31%
FI	0	29	29	2	52	54	86%
FR	2	43	45	3	57	60	33%
GB	3	15	18	3	10	13	-28%
GR	2	11	13	2	23	25	92%
HR	0	9	9	2	43	45	400%
HU	2	53	55	2	105	107	95%
IE	2	3	5	7	21	28	460%
IT	3	21	24	4	24	28	17%
LT	2	6	8	2	9	11	38%
LU	0	0	0	0	0	0	N/A
LV	2	8	10	2	8	10	0%
MT	2	0	2	2	2	4	100%
NL	2	34	36	2	59	61	69%
PL	2	69	71	9	100	109	54%
PT	1	37	38	3	68	71	87%
RO	2	40	42	2	56	58	38%
SE	2	39	41	2	70	72	76%
SI	0	17	17	2	50	52	206%
SK	2	2	4	2	57	59	1375%
[1] Northern Cyprus							

Source: European Audiovisual Observatory

1.4 Developments in EU television consumption

The time spent watching television is an important proxy (i.e. substitute measure) for detecting changes in viewing behaviour. If, for example, people spent less time watching television this may indicate that they are engaging in different viewing behaviour and consuming television content and other video content on different platforms and devices.

Pan-European trends

An overview of the average daily viewing times in the EU[5] in the period 2009 to 2014 is given in the chart below. For these viewing times the following pan-European trends can be observed.

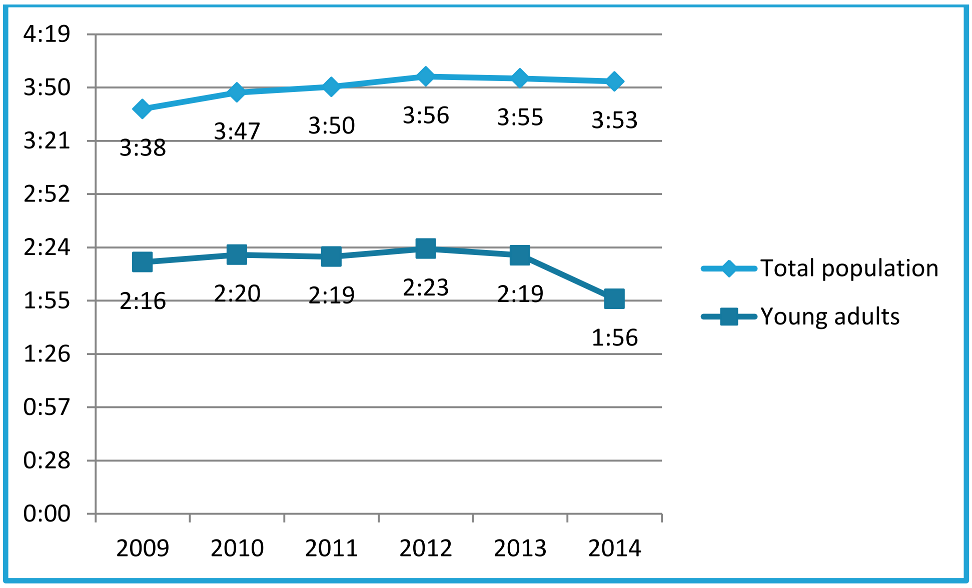
- **Slight decrease in television consumption among EU total population since 2012:** Considering the inclusion of time-shifted[6] television viewing into audience measurement the figures indicate a more pronounced decline of live television viewing in real terms.
- **Significant drop in television consumption among young people since 2012:** Television viewing among young adults in the EU has dropped by almost 1/5 (19%) since 2012.
- **Gap between television consumption of total population and young people widens:** The difference between the average time spent watching television by the general audience and young people has increased over the time period from 2009 to 2014.
- **TV consumption of young people significantly lower:** The younger population watched only half as much television as the total population in 2014.

The figure overleaf provides an overview of the pan-European trends in the development of television viewing times among the total population and young people in the EU.

[5] No data available for Luxembourg and Malta.

[6] Time shifted viewing in this context means a) viewing on a TV screen most commonly within 7 days after the live broadcast using the recording or live playback functions of digital video recorders (DVRs) and b) viewing on a TV screen, most commonly within 7 days after the live broadcast, using TV platforms of the TV channels (e.g. BBC iPlayer TV platform).

Figure 62: EU average television viewing times 2009-2014 – total population and young people[7]



Source: European Audiovisual Observatory on the basis of data from Eurodata TV Worldwide

[7] Daily viewing time averages for young adults 2009-11 are based on universe estimates for the year 2012.

1.4.1 Section analysis – EU television consumption

The following two tables provide an overview of the viewing time habits of the whole and younger population by country over the period from 2009 to 2014.

An analysis of the average daily viewing times of the total population and younger people in the EU revealed the following key trends:

- **Television consumption varies widely between EU countries:** Highest television consumption among total population in Romania (05:42) and lowest in Sweden (02:33); highest television consumption among young people in Portugal (03:45) and lowest in Sweden (01:12).
- **Decline in television consumption of young people in 3/4 of EU countries[8]:** Television consumption of young people in 18[9] out of 26 EU countries decreased from 2009 to 2014.

The table overleaf provides a pan-European overview of the development of television viewing times among the total population.

[8] No data available for Luxembourg and Malta

[9] 18 EU countries and the French Community of Belgium

Table 7: Linear audiovisual media services average daily viewing time by country and total 2014 vs. 2009

Country	Age group	2009	2010	2011	2012	2013	2014	2014 vs. 2009
AT	3+	02:25	02:32	02:38	02:48	02:38	02:42	12%
BE	4+			03:02	03:08	03:05	03:05	N/A
BE (CFB)	4+	03:18	03:23	03:16	03:19	03:14	03:13	-3%
BE (VLG)	4+	02:40	02:54	02:52	03:00	02:58	02:59	12%
BG	4+	03:41	04:01	03:45	03:49	03:45	03:43	1%
CY	4+	02:49	03:04	02:45	02:59	03:22	03:30	24%
CZ	4+	03:10	03:11	03:17	03:21	03:28	03:27	9%
DE	3+	03:32	03:43	03:45	03:42	03:41	03:41	4%
DK	3+	03:09	03:21	03:18	03:15	03:00	02:53	-8%
EE	4+	03:54	03:55	03:49	03:46	03:36	03:40	-6%
ES	4+	03:46	03:54	03:59	04:06	04:04	03:58	5%
FI	4+	02:50	02:52	02:52	02:55	02:54	02:56	4%
FR	4+	03:25	03:32	03:47	03:50	03:46	03:41	8%
GR	4+	04:24	04:34	04:28	04:22	04:11	04:17	-3%
HR	4+	04:23	04:29	04:27	04:23	04:15	04:19	-2%
HU	4+	04:25	04:44	04:46	04:46	04:46	04:49	9%
IE	4+	03:05	03:16	03:25	03:23	03:16	03:14	5%
IT	4+	03:26	04:06	04:14	04:17	04:21	04:22	27%
LT	4+	03:26	03:27	03:24	03:36	03:40	03:24	-1%
LV	4+	03:43	03:35	03:29	03:34	03:19	03:30	-6%
NL	6+	03:04	03:11	03:11	03:16	03:15	03:20	9%
PL	4+	04:00	04:05	04:02	04:03	04:07	04:20	8%
PT	4+	03:29	03:30	03:39	04:44	04:58	04:56	42%
RO	4+	04:22	04:23	04:22	05:26	05:41	05:42	31%
SE	3+	02:45	02:46	02:42	02:44	02:39	02:33	-7%
SI	4+	03:01	03:12	03:06	03:13	03:15	03:19	10%
SK	4+	03:09	03:24	03:27	03:38	03:47	03:48	21%
UK	4+	03:45	04:02	04:02	04:01	03:52	03:40	-2%
EUR Average[10]		**3:38**	**3:47**	**3:50**	**3:56**	**3:55**	**3:53**	**7%**

Source: European Audiovisual Observatory on the basis of data from Eurodata TV Worldwide

[10] No data available for Luxembourg and Malta

Levels of television consumption in 2014

The level of television consumption differs widely from one EU country to another. This may depend on the different particular culture, practices and patterns of consumption of television content in the domestic sphere.

The key findings for the total population are summarised below:

- **In more than ½ of EU countries people watched between 3-4 hours of television per day:** In 15 out of 26 EU countries people watched between 3-4 hours of television per day.
- **In around ¼ of EU countries people watched more than 4 hours of television per day:** In seven countries (RO, PT, HU, IT, PL, HR, GR) the level of television consumption is more than 4 hours per day.
- **The Nordic EU countries and Austria had lowest TV consumption whereas Romania had highest:** People in Romania watched the most television in the EU in 2014 with an average of almost six hours per day (05:42). The three Nordic countries Sweden, Denmark, Finland and Austria have one of the lowest levels of television consumption in the EU with less than 3 hours per day.

The key results for the younger population are as follows:

- **In more than ½ of EU countries young people watched between 1 and 2 hours of television per day:** 15 out of 26 EU countries.
- **In 1/3 of EU countries young people watched between 2 and 3 hours of television per day:** 9 countries (HU, NL, IT, IE, FR, UK, ES, HR, DE).
- **Young people in Portugal and Romania had highest levels of TV consumption:** More than 3.5 hours on average per day.
- **Young people in the Nordic countries Sweden and Finland and Slovenia had lowest levels of TV consumption:** Average television viewing time less than 1.5 hours per day.

Changes in television consumption over time 2009 vs. 2014

An analysis of average daily viewing times of the total population over time reveals that the changes in viewing habits vary significantly from one country to another. Whereas people in Portugal watched 42% more television in 2014 than they did in 2009, the Danish population watched 8% less than 6 years before.

The changes in television consumption in the EU can be summarised by three main trends:

- **People in 1/3 of countries watch less television than before:** In 8 EU countries (DK, SE, EE, LV, GR, UK, HR, LT) and in the French Community of Belgium, television viewing times decreased from 2009 to 2014 varying from -8% in Denmark to -1% in Lithuania.
- **1/3 of countries showed a moderate increase of television consumption (≤ 10%):** In 10 EU countries (HU, CZ, NL, PL, FR, ES, IE, DE, FI, BG) the increase in viewing times was below 10%.
- **People in 1/3 of countries watched significantly more television (≥ 10%):** A group of 8 countries and the Flemish Community of Belgium (PT, RO, IT, CY, SK, AT, SI) had a significant rise in viewing times with over 10%.

The changes in television consumption among the younger EU population can be summarised as follows:

- **In 3/4 of EU countries young people watched less television than 6 years before:** Television consumption of young people in 18[11] out of 26 EU countries decreased from 2009 to 2014.

In addition, the viewing habits among the younger generation in two countries (NL, IT) remained almost unchanged whereas those in five others and the Flemish Community of Belgium saw significant increases above 10% in the time spent watching television (IE, AT, RO, PT, CY).

The table overleaf provides a pan-European overview of television viewing times among younger people in the EU.

[11] 18 EU countries and the French Community of Belgium

Table 8: Linear audiovisual media services viewing time younger people by country and total 2014 vs. 2009

Country	Age group	2009	2010	2011	2012	2013	2014	2014 vs. 2009
AT	12-29	01:24	01:34	01:35	01:35	01:28	01:35	13%
BE[12]	18-24			01:15	01:23	01:40	01:38	N/A
BE (CFB)	18-24	01:33	01:24	01:30	01:37	01:49	01:30	-3%
BE (VLG)	18-24	01:05	01:14	01:02	01:12	01:33	01:45	62%
BG	15-24	02:13	02:10	01:57	02:02	02:05	01:47	-20%
CY	13-24	01:19	01:28	01:22	01:26	01:25	01:56	47%
CZ	15-24	01:38	01:31	01:28	01:30	01:30	01:31	-7%
DE	14-29	02:16	02:22	02:21	02:17	02:08	02:04	-9%
DK	15-24	02:30	02:46	02:43	02:27	02:04	01:52	-25%
EE	15-24	02:14	02:13	02:06	02:01	01:50	01:44	-22%
ES	15-25	02:22	02:26	02:26	02:33	02:26	02:14	-6%
FI	15-24	01:22	01:35	01:27	01:26	01:19	01:17	-6%
FR	15-34	02:35	02:38	02:45	02:47	02:37	02:26	-6%
GR	15-24	02:39	02:40	02:34	02:25	02:01	01:59	-25%
HR	15-24	02:50	02:53	02:39	02:29	02:20	02:09	-24%
HU	15-24	02:42	02:47	02:45	02:39	02:46	02:44	1%
IE	15-34	02:12	02:29	02:52	02:54	02:42	02:29	13%
IT	15-24	02:20	02:20	02:29	02:33	02:37	02:31	8%
LT	15-24	02:10	02:05	01:59	02:01	01:43	01:36	-26%
LV	15-24	01:58	01:58	01:44	01:40	01:29	01:32	-22%
NL	20-34	02:39	02:46	02:42	02:40	02:41	02:38	-1%
PL	16-24	01:58	02:01	01:54	01:58	01:54	01:54	-3%
PT	15-24	02:35	02:44	02:49	03:55	03:47	03:45	45%
RO	15-24	02:52	02:35	02:21	03:48	03:57	03:34	24%
SE	15-24	01:40	01:39	01:27	01:25	01:22	01:12	-28%
SI	15-24	01:33	01:44	01:39	01:25	01:17	01:24	-10%
SK	15-24	01:52	01:57	01:52	01:52	01:53	01:51	-1%
UK	16-24	02:35	02:49	02:45	02:37	02:28	02:18	-11%
EUR Average[13]		**2:16**	**2:20**	**2:19**	**2:23**	**2:19**	**1:56**	**-15%**

Source: European Audiovisual Observatory on the basis of data from Eurodata TV Worldwide

[12] National

[13] No data available for Luxembourg and Malta