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European fiction works on TV channels

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Summary of main trends

- On a pan-European basis, the balance of European fiction works in terms of their origin (national, non-national European and European) remains very stable over the five year period 2009-2013, with non-European fiction works at around 62%
- National production broadcast in its home country makes up, on average, 50% of the European content on national channels. At the same time around 45% of European content is non-national, which is a positive indication of the circulation of European fiction works
- There is a striking difference between the proportions of European fiction content on public and private channels, with public channels in the pan-European analysis scheduling more than 50% of European fiction content and private channels scheduling less than 20%.
- Between 2009 and 2013, the share of non-European fiction on private channels has been gradually increasing in Germany, the UK, Sweden and Austria.
- The genre of fiction content that is most dominant (total hours broadcast) on TV channels is the TV series. This is not so surprising due to the regular and sometimes repetitive broadcasts of TV series. European TV series tend to be domestic. Overall, TV series tend to have the strongest proportions of non-European content. This appears to be growing and reached 67% non-European in 2013
- Genres that are stronger in terms of European content are TV Films (50% are European) and animation (around 40% European). Regarding feature films, the non-European proportion broadcast on the channels remains very stable at 60% over five years
- However, there is significant diversity between the different European countries in the study with regard to origin of fiction. Specific country exceptions should be noted. On the basis of the country analysis, the levels of European content are much higher on the channels in France, Finland, the United Kingdom, Poland and Portugal than in the pan-European overview
- This European content in the United Kingdom is almost entirely British content. The same can be said for Poland where almost 50% of all fiction is Polish, and for Portugal where national content makes up more than 40% of fiction content Several countries have a much lower than average level of national TV fiction content on their channels. These include small markets such as Austria, the Belgian French Community, Ireland and Luxemburg. National content is also at quite a low level in Sweden and Denmark
- A focus on small countries indicates the extent to which European content on national channels may be dominated by content of neighbouring countries: German content in Austria; French content on the channels in the French-speaking community of Belgium; and British content on the Irish channels

1. Origin of fiction programming on European Television

1.1. Introduction

The purpose of this report is to provide an overview of the trends in fiction programming over the years 2009-2013 with regard to their origin and circulation.

The analysis will show:

1. The proportion of European (both national and non-national) TV programming broadcast on the main TV channels and the extent to which this remains stable over time
2. The proportion of non-European programming in the schedules of the main European TV channels and the extent to which this remains stable over time
3. A comparison between the presence of European (national and non-national) and non-European programming on the public channels and the private channels in Europe
4. Analysis per genre on the main channels regarding the origin of programming: European (national and non-national) and non-European
5. Country by country analysis of the origin of programming (all genres) including the circulation of European content
6. Country by country analysis comparing public and private channels

The data provided here is not sufficient for a full assessment of compliance with the Audiovisual Media Services Directive. There are several reasons for this:

- The data is confined to fiction programming and does not, for example, include documentaries
- The categories of genres of TV programming that qualify as European works ("qualifying hours") vary throughout the EU, and are more narrow (more strict) in France and Germany for example. Hence for many countries a range of programming that may be included in qualifying hours are not represented here.[1]
- Not all EU countries are covered in this sample (see under methodological review 1.2).

1.2. Methodological Overview

The analysis has been prepared on the basis of data provided by ROVI International.

This section provides a very brief context for the reader regarding the data, the selection of channels, the genres of programming covered, and the categorisations of the country of origin of content.

[1] See more details on the differences in "qualifying hours" in the report completed for the European Commission: Attentional, Gide Loyrette Nouel, Headway International, Oliver & Ohlbaum (2011): ***Study on the implementation of the provisions of the Audiovisual Media Services Directive concerning the promotion of European works in audiovisual media services***. Available here: https://ec.europa.eu/digital-agenda/en/news/study-promotion-european-works

Time series and geographical scope

A time series is provided that includes data from the years 2009-2013. It should be noted that the selection of television channels by ROVI has increased over time. Hence there is, in general, data available on more TV channels in 2013, than there was in 2009. For the purpose of this report, we have tried to keep the same number of channels (and the same channels) in the sample for the 5 years for reasons of consistency when comparing programming data.

The selection of countries featured in the analysis has been dependent on the countries covered by Rovi (see more regarding channels below) and by cost restraints in the purchase of data. These are (including 13 EU member states covered between 2009 and 2013): Austria, Belgium (French and Flemish speaking markets), Germany, Denmark, Spain, Finland, France, United Kingdom, Ireland, Italy, Luxembourg, Netherlands, and Sweden. In addition we look at Poland data covering the years 2011-2013, and Portugal data which are only available for 2012-2013.[2] For Belgium, there are two separate TV markets (with regard to audiences and channels).

TV channels and audience market shares

The inclusion of television channels in the analysis is dependent on the countries and channels covered by the company ROVI in the context of their own commercial business.

In order to facilitate a European comparison over time, a particular methodological approach was used in selecting the final channels for analysis. As far as possible the total channels selected represented those which reached (as close as possible) 75% of daily audience share.

In selecting the channels for the analysis on the basis of audience figures (EurodataTV/ Médiamétrie), it was noted that television broadcast markets are less concentrated in terms of audience share than previously anticipated, and also that these levels of concentration have decreased between 2009 and 2013. The expansion of the range of niche channels and additional digital channels has served to fragment audiences further over this time period.

The channel selection is based on audience shares in 2009 and the channels remain constant throughout the analysis for the sake of consistency in the comparison of the levels of European fiction works broadcast. Table 1 outlines the complete list of channels monitored (with their audience data in 2009 and in 2013).

These channels (as they include all those with the highest audience shares) tend to be the main generalist channels for the public service broadcasters and the generalist channels of the most important private players in the market. The sample includes many channels that are more “entertainment” focused and several cultural, children, and film channels that have a significant audience.

- For the pan-European (5 year) analysis, 96 national channels in 14 markets were sampled
- These 96 plus an additional 8 channels (in Portugal and Poland) were analysed for 16 markets at the country level
- A small sample of 14 film channels were analysed in relation to European film genres

[2] For Poland and Portugal, their data will be dealt with separately from the other countries when showing global trends over the period 2009-2013. They have dedicated sections under the country by country analysis.

Where foreign TV channels are important in national TV landscapes

For several countries, in order to reach an audience of close to 75% (cumulated by all channels), it was necessary to also recognise the importance of certain foreign channels broadcasting in the country that have a significant audience share. This was the case for Belgium (French Speaking Community), for Austria, Luxembourg and to some extent for Ireland.

There are some distinctions even within this group. Austria, Luxembourg and Ireland are countries where the "overspill" of television services (from larger neighbours in the same language group) play a significant role in the market. This "overspill" is also significant in the French-speaking community of Belgium, however there are also a range of channels established in Luxembourg that "specifically target" Belgium. In Sweden and Denmark there are certain key channels in the market that "specifically target" the country but are licensed in the UK. These "specific target" channels are counted among the 96 national channels, and included in their target countries.

Definitions, genres, categories and units of measurement used in the data

The ROVI data covers a wide range of television programme genres that make up the majority of programming types that qualify as European works. However, the sample does not include documentaries, and potentially other genres of programming which may be counted as European works at the national level in some Member States. The genres of programming included are: TV Films, TV Series and Soaps, Animation, Feature Films and Short Films. Hence the focus of the analysis is on fiction genres.

The country of origin of the programming broadcast on the TV channels broadly includes European programming, co-productions (which are further broken down into European, mixed and non-European), and non-European programming.

Regarding programming of European origin, the data indicates programming originating from the big five: Germany, France, Spain, Italy and the UK. All other programming of European origin is labelled "other European". For each country, there is also a category "national origin" which allows for an assessment of the strength of national programming on national channels (for all countries in the sample).

For the co-productions, the European and non-European co-productions are quite clear however the "mixed co-productions" designates programming made in co-operation between European and non-European companies. There is no further breakdown as to which of these are minority or majority co-productions and the extent to which this category should be included as European programming is unclear.

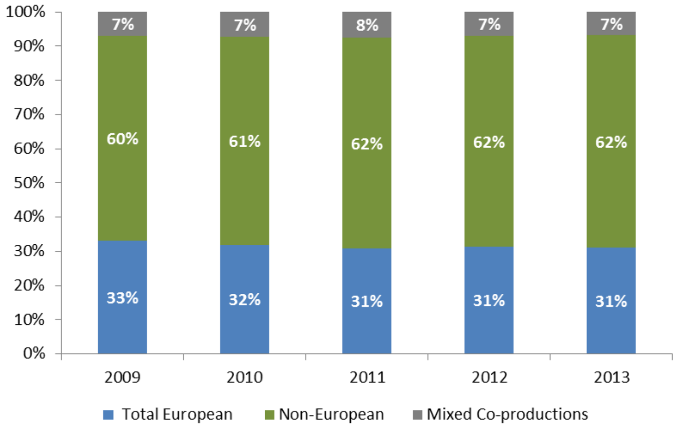
The non-European origin of programming also includes several specific countries and regions indicating their national origin: USA, Canada, Australia/New Zealand, and Japan. The category also includes "other non-European" covering other regions and countries.

On a final note, the data has been gathered on the basis of two units of measurement: "number" implying the total number of programmes, and "hours" representing the total number of hours of programming. We have used the data for "hours of programming" as the most suitable unit for analysing the proportions of programming from different origins.

1.3. Pan-European trends in the origin of fiction programming

The first graphic (fig 1) provides a general overview, over the five year period, as to the proportions of European and non-European fiction content on the main TV channels in 14 markets (on 96 TV channels).[3]

Fig 1: Proportion of European and non-European fiction programming (all genres) on channels 2009-2013

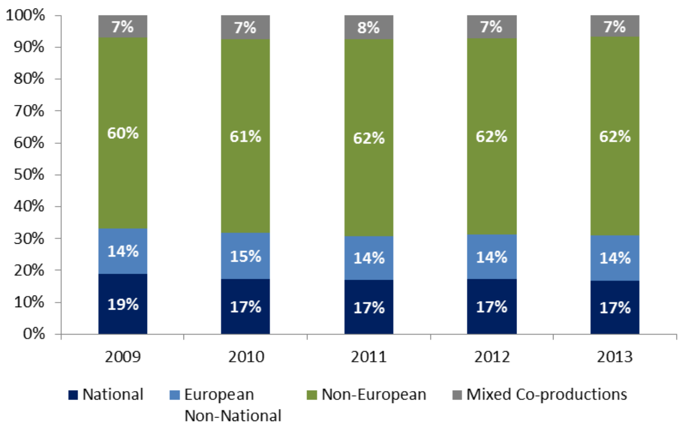


Source: European Audiovisual Observatory on the basis of data from ROVI International

As the graphic shows, the proportions of European, non-European and mixed co-production fiction works have remained very stable over the 5 years. On average, European content comprises 31% of the fiction programming on these major channels, to which could be added the 7-8% of mixed co-production programming, hence reaching almost 40%. However, the proportion of fiction programming that is non-European is on average 61-62%.

Looking more closely at this global data, we can see how important "national" TV programming is in the overall proportion of European programming (fig 2).

Fig 2: Proportion of national, non-national European and non-European fiction programming on channels 2009-2013



Source: European Audiovisual Observatory on the basis of data from ROVI International

[3] See table 1 for full details. Poland and Portugal are dealt with separately under the country analysis as the channels were not measured by ROVI during the full five year period.

Programming of national origin is consistently just over 50% of the total European programming shown on these national channels.

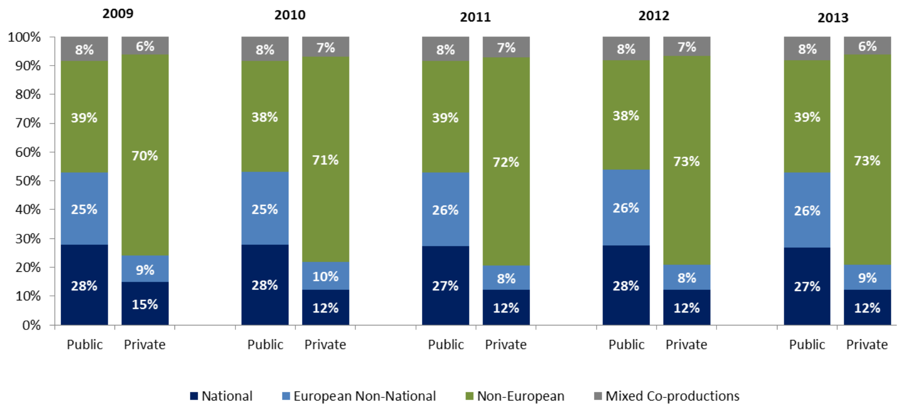
This is hardly surprising as national channels are either: producing their own content; commissioning content; and in principle serving a proportion of local content in the national language with national cultural stories and references.

On the other hand around 45% of the European content broadcast on the TV channels is non-national or “other European” which is a good indication of the levels of circulation of European fiction.

1.4. European programming on public and private television

In the sample (of 96 channels), public channels account for around 43% of the channels surveyed while private are around 57%. Fig 3 outlines the trends between 2009 and 2013.

Fig 3: Global comparison of origin of programming on public and private channels 2009-2013



Source: European Audiovisual Observatory on the basis of data from ROVI International

The data clearly shows a stark contrast between the public and private channels in Europe. For the private channels, the proportion of non-European programming is significantly higher than the global European average of 62%, and instead reached up to 73% in 2012 and 2013.

On public channels, more than 50% of all fiction works are European and this figure remains steady over the five year period. In addition, public service channels are much more likely to show non-national European content with almost half of the European content on the channels originating from other countries.

1.5. Presence of European programming on the basis of genres

The genres of programming included in the analysis are: TV Films, TV Series and Soaps, Animation, Feature Films and Short Films. Hence the focus of the analysis is on fiction genres. The following section provides an overview of the genres of programming in which works of European origin have a stronger (or weaker) presence.

Fig 4: Overview of the main fiction genres on European TV channels and their origin in 2013

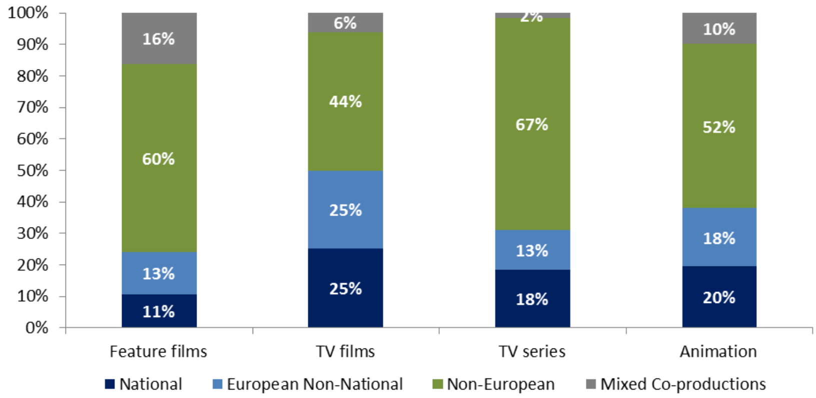
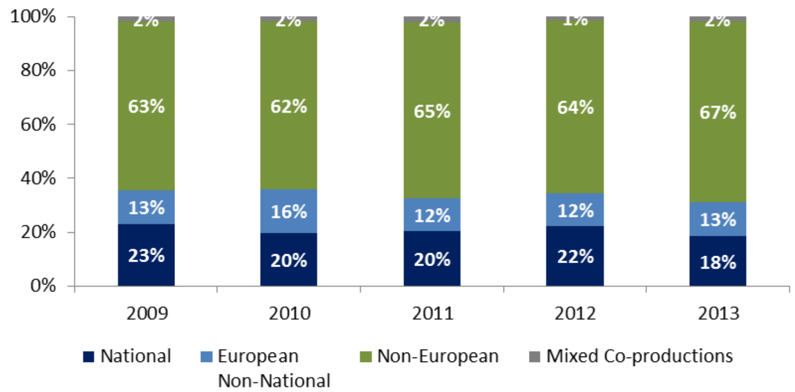


Figure 4 provides an overview of the main genres (not including short films).

TV series and soaps

The proportions of European, national and non-European content in TV series and soaps is outlined below. Compared to the global picture for all genres (see fig 2, page 6), the proportion of national content tends to be stronger for this particular genre. In 2013, the proportion of non-European TV series and soaps content was at its highest level in the five years at 67%. This is also the genre where mixed co-productions (European and non-European countries) are least significant in terms of origin of production.

Fig 5: Proportion of European and non-European TV Series and Soaps on TV channels 2009-2013

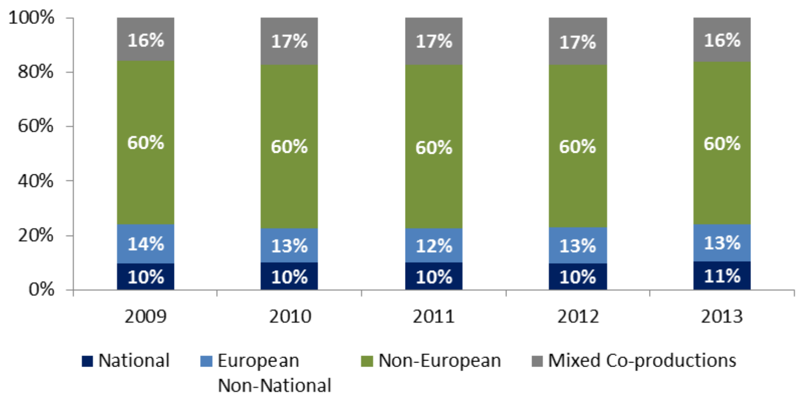


Source: European Audiovisual Observatory on the basis of data from ROVI International

Feature films broadcast on TV

Fig 5 illustrates the data for feature films shown on TV. The non-European films have a remarkably stable 60% share of films broadcast over the five years on the channels selected. National films are slightly less important than non-national European films, indicating a reasonable circulation of European films. Feature films whose origins lie in a mixed co-production (European and non-European) make up a significant amount of the total feature films, and is higher in proportion than non-national European films. Within the data it is not possible to assess whether these are minority or majority co-productions, or which European countries are involved in their production.

Fig 6: Proportion of European and non-European feature films on channels 2009-2013



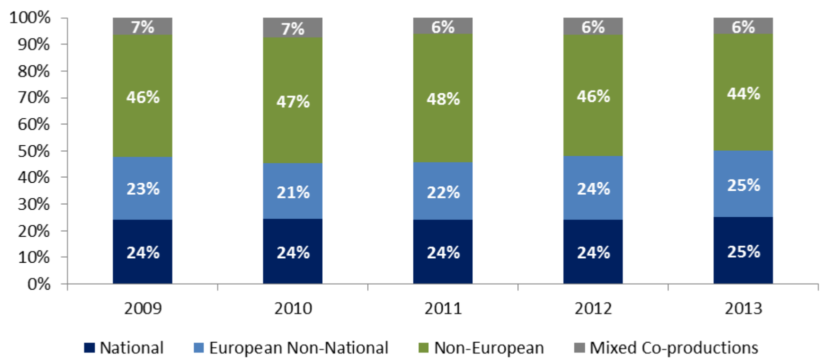
Source: European Audiovisual Observatory on the basis of data from ROVI International

For specific countries, in particular the larger countries (France, Germany, the UK, and Poland etc.) the proportion of national and/ or European films is higher than in the overall European picture of European films. An additional section of this report includes a focus on film on 14 European film channels (see section 1.7)

TV films

TV Films or films made for TV have a much higher proportion of national and European origin. The fact that TV films are likely to often be commissioned by, or partly financed by broadcasters may explain this.

Fig 7: Proportion of European and non-European TV films on TV channels 2009-2013

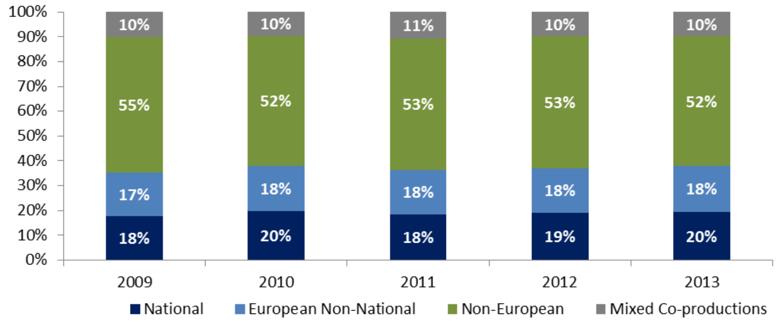


Source: European Audiovisual Observatory on the basis of data from ROVI International

Animation

Animation data here includes TV animation series but not animation feature film data. Animation feature films are included in the feature film category of data. The data shows that European content (on average 18%) and national content (20% in 2013) for animation has a higher proportion than is the case for most other genres.

Fig 8: Proportion of European and non-European Animation on TV channels 2009-2013



Source: European Audiovisual Observatory on the basis of data from ROVI International

Regarding animation, it should also be noted that the data sampled in this report over the years 2009 to 2013 covered very few children's channels (for example Ketnet, Super RTL, Kika, CBeebies, CBBC). It is useful in this context to highlight a separate report carried out for Creative Europe (sub-division media)[4] – ***Focus on Animation*** - that looked at animation on more than 70 children's TV channels. The report provides country by country overviews for France[5], Germany, Italy, Spain and the UK. It also compares the levels of European and non-European content on national children's channels and on the major pan-European brand children's channels (Boomerang, Disney, Cartoon Network and Nickelodeon). The main findings of the report regarding origin of TV animation included the following:

- The amount of animation broadcast on main TV channels (not children) has reduced since 2009, in particular in Germany, Spain and Italy
- National and European animation content is strong on French national children's channels
- European animation content is strong on German and Italian national children's channels
- National animation is dominant on the British national children's channels
- Non-European animation has grown stronger on Spanish national children's channels
- The pan-European channel brands (of US origin) broadcast mainly non-European content (between 50 and 60%)

[4] European Audiovisual Observatory (2015) **Focus on Animation**. Report prepared for the European Commission Creative Europe (sub-division media). Available here : http://ec.europa.eu/digital-agenda/en/news/focus-animation

[5] Including also data from the French CNC.

Short films

There is very little data on short films being broadcast on TV. Hence the data has not been illustrated in graphics here. These films are most likely to be broadcast in Belgium, Italy, France, Germany and the Netherlands, with fewer examples in the UK, Spain and Nordic states. These films mainly tend to be national, and more than two third of the short films broadcast were European.

1.6. Analysis of origin of programming by country

The country by country analysis is divided into 3 sections:

Big 6 European markets: The first section provides an analysis focused on the 6 largest EU markets: Germany, UK, France, Italy, Spain and Poland (data for Poland from 2011-2013).

Other European markets: A second section focuses on other medium to large markets such as the Netherlands, Sweden, Finland, Denmark and Portugal. In some cases these markets have important channels that are established in other countries (Netherlands, Sweden and Denmark).

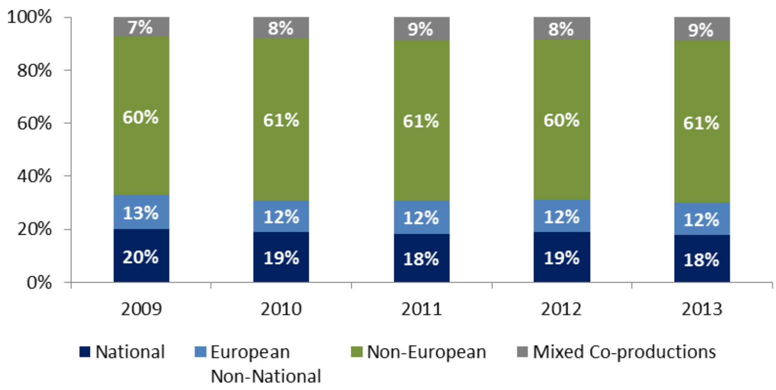
Small European markets and the influence of foreign channels: A third section focuses on the smaller countries in the sample where the content of, and the channels of neighbouring countries play a significant role in the market: Austria, Belgium, Ireland and Luxembourg.

Big 6 European markets

Germany: Private channels have steadily increased non-European content

The figure below shows the proportions of European and non-European fiction programming on the German channels (12 channels)[6] over the five years of analysis. Similar to the European picture, the non-European programming represents on average 60-61% of the entire fiction programming. The proportion of European programming, (including mixed co-productions) is steady at about 40%.

Fig 9: Proportion of national, other European and non-European programming on German national channels 2009-2013



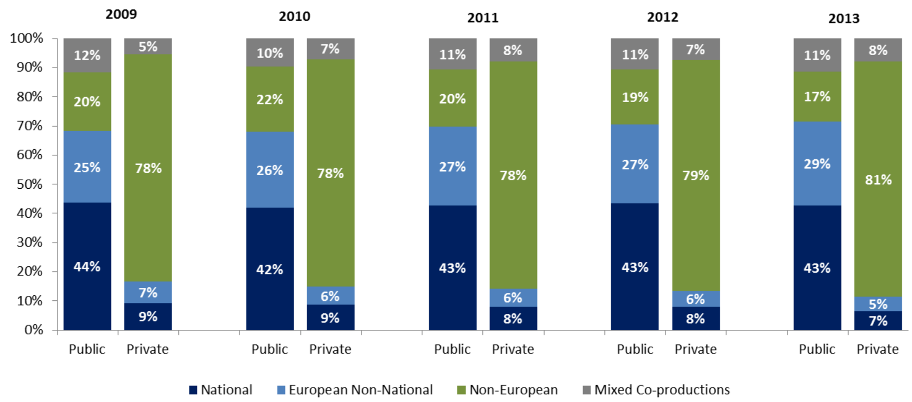
Source: European Audiovisual Observatory on the basis of data from ROVI International

Figure 9 (overleaf) provides a comparative view of the difference in the proportions of national, non-national European and non-European programming on public and private channels.

Private channels have steadily increased the non-European fiction programming to reach 81% in 2013. On the other hand the public channels broadcast on average 70% European fiction content, almost two thirds of which is German.

[6] These channels represented a national daily audience share of 68% in 2009, according to data from EurodataTV (see table 1)

Fig 10: Origin of programming, comparing public and private German national channels 2009-2013



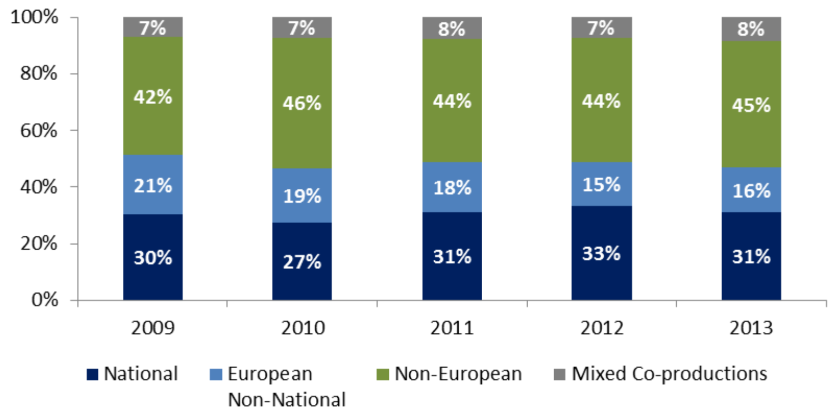
Source: European Audiovisual Observatory on the basis of data from ROVI International

Although not illustrated here the national fiction content genre in Germany that is by far the most significant (in terms of hours) is TV series, making up two thirds of the national content. When German channels broadcast other European content it is most likely to be mixed co-productions, European co-productions, British content or French content.

France: Very high levels of European and national content on both public and private

The French data shows the strongest presence of both national and total European (national and non-national European) on the big 6 TV markets.[7] Non-European content across all the fiction genres is on average just 44% over the five years. This may reflect the fact that the French regulatory system places stronger obligations on French broadcasters under the AVMS than in many other countries. For example the "qualifying hours" (genres counted as European works) are narrower than in some other countries. However, the levels of French and European content are still impressive.

Fig 11: Proportion of national, European and non-European programming on French national channels 2009-2013

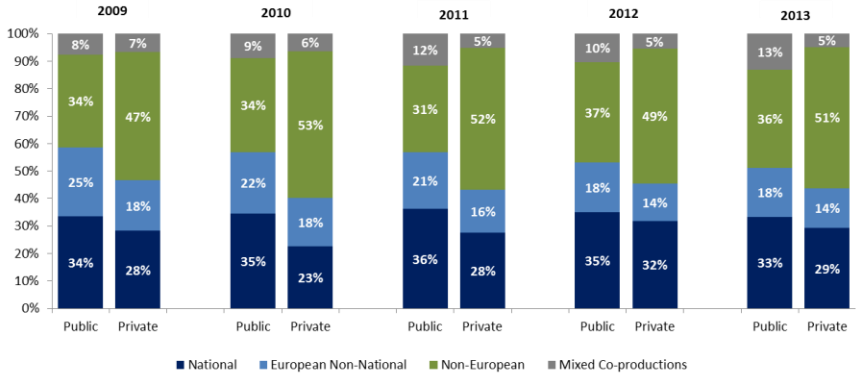


Source: European Audiovisual Observatory on the basis of data from ROVI International

[7] Data is based on 9 TV channels that represented a national daily audience share of 75,8% in 2009, according to data from EurodataTV (see table 1)

French public and private channels are much more in line with each other with regard to origin of the content they show (compare with German public and private). The French private channels show well above average proportions of European (including national) programming.

Fig 12: Origin of programming, comparing public and private French national channels 2009-2013



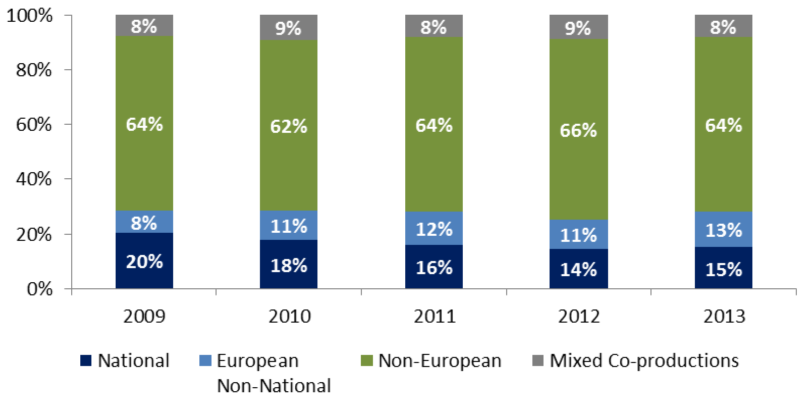
Source: European Audiovisual Observatory on the basis of data from ROVI International

In France TV Series represent almost half of the national fiction content (in terms of hours). French feature films are in second place representing almost one quarter of the national fiction content. When French channels broadcast other European content it is most likely to be mixed co-productions, European co-productions and German content.

Spain: Origin of content stable but national content reduced on public TV

Data on the Spanish TV landscape is based on just 7 channels, but these represented 65% of the daily audience share in 2009. Non-European fiction content has a stronger presence in Spain than the European average. The levels of national fiction content are relatively weak for such a large market. TV Series are also the most common fiction genre in Spain regarding national content and this genre accounts for more than two thirds (of the hours), followed by Spanish feature films (almost one third).

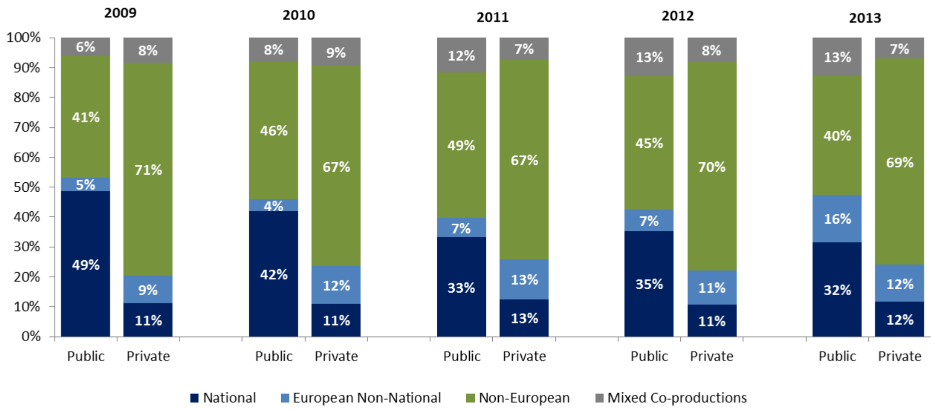
Fig 13: Proportion of national, European and non-European programming on Spanish national channels 2009-2013



Source: European Audiovisual Observatory on the basis of data from ROVI International

Looking at the contrast between public and private channels (fig 13), it is apparent that the decrease in national fiction content on Spanish TV has mainly occurred on the public channels, which are stronger in supporting this content than the private (while non-national European content has increased). This decrease may reflect the general economic crisis in the sector over the period.

Fig 14: Origin of programming, comparing public and private Spanish national channels 2009-2013



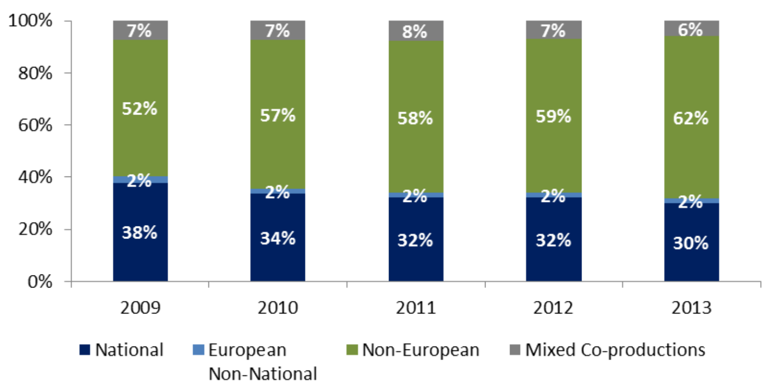
Source: European Audiovisual Observatory on the basis of data from ROVI International

When Spanish channels broadcast other European content it is most likely to be mixed co-productions, German, French and British content.

The United Kingdom: if its European, then it must be British

Similar to the French data, the proportion of national fiction programming on the TV channels[8] in the UK is much higher than average. However, the presence of other European programming is extremely low and more inclined to be based on mixed co-productions (which essentially could also include British/ non-European co-productions). The other European content represents just 2% of content on British channels. It should be noted that non-European content is steadily climbing over the 5 year period, while national is falling.

Fig 15: Proportion of national, European and non-European programming on British national channels 2009-2013

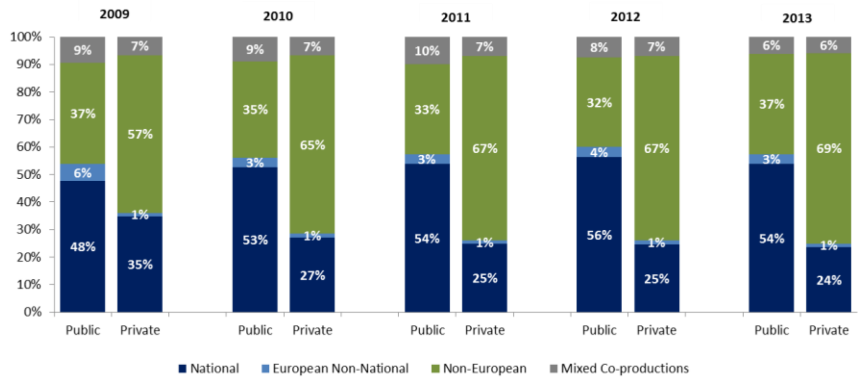


Source: European Audiovisual Observatory on the basis of data from ROVI International

[8] Based on 18 channels which together had a 66.7% daily audience share in 2009, according to data from EurodataTV (see table 1)

The private channels in the UK have a higher level of European content than the average for private channels across Europe; however this level has decreased over the five years by more than ten percentage points, while non-European is increasing. The level of European content on the public channels is also higher than the average in Europe. Again, the main distinction between the UK and most other countries is the dominance of national content within the European programming.

Fig 16: Origin of programming, comparing public and private British national channels 2009-2013



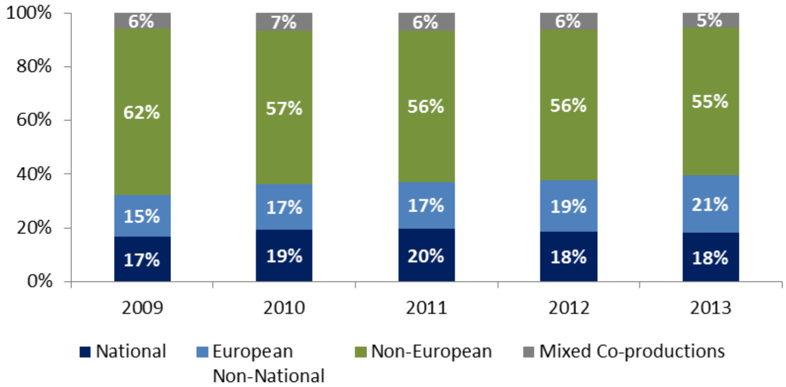
Source: European Audiovisual Observatory on the basis of data from ROVI International

In the British case, TV Series are also the most common fiction genre making up on average two thirds of the national content (in terms of hours), followed by animation. European content, where it exists is most likely to be mixed co-productions (which may be British) or European co-productions.

Italy: European content growing but national content reduced on public TV

Non-European content on the main Italian TV channels[9] is lower than the global European average and seems to be dropping slowly over the time period with European content increasing from 32% to 39% over the five years. It is mainly the non-national European content that has increased over time rising 6 percentage points in the 5 year period.

Fig 17: Proportion of national, European and non-European programming on Italian national channels 2009-2013

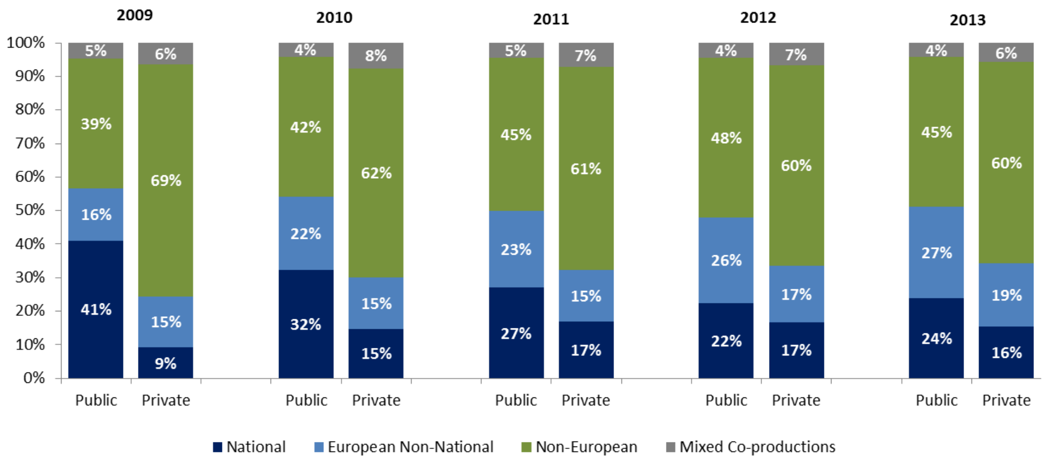


Source: European Audiovisual Observatory on the basis of data from ROVI International

[9] Based on 7 channels which combined had an 81,2% daily audience share in 2009, according to data from EurodataTV (see table 1)

In Italy the private channels are broadcasting more national and more European fiction works than most European private channels. The levels are still less than the Italian public channels but growing steadily over time.

Fig 18: Origin of programming, comparing public and private Italian national channels 2009-2013



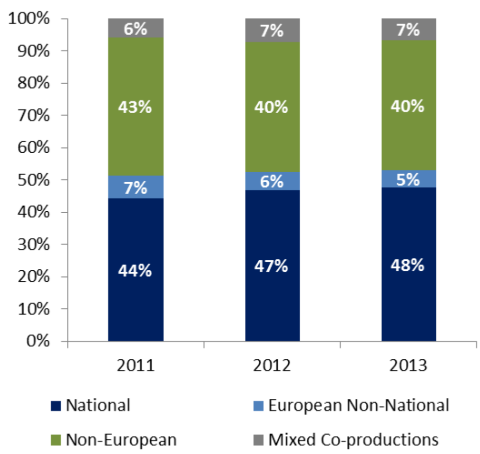
Source: European Audiovisual Observatory on the basis of data from ROVI International

Italian feature films constitute almost half of national fiction works on these main channels, while TV series make up another third. European content on Italian channels includes German (TV series), mixed co-productions, European co-productions and to a lesser extent French and British content.

Poland: almost 50% of all fiction on TV is Polish

Poland was not included in the global analysis (under 1.3, 1.4 and 1.5), as the data available just covered three of the five years and the intention was to keep the actual channels analysed over 5 years consistent. Here we present the three years of Polish data on the basis of 4 channels, which had a combined audience data of 67% in 2009 (a figure which has decreased over the five years). Most remarkable is the importance of national content on these channels – close to 50% of all fiction works.

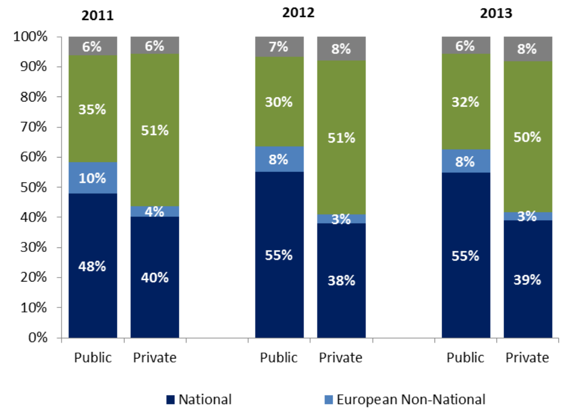
Fig 19: Proportion of national, European and non-European programming on Polish national channels 2009-2013



Source: European Audiovisual Observatory on the basis of data from ROVI International

Looking at the breakdown between public and private, we can see that both public and private channels broadcast a significant amount of national content with the private showing far less non-European fiction content than the average across the other European countries.

Fig 20: Origin of programming, comparing public and private Polish national channels 2009-2013



Source: European Audiovisual Observatory on the basis of data from ROVI International

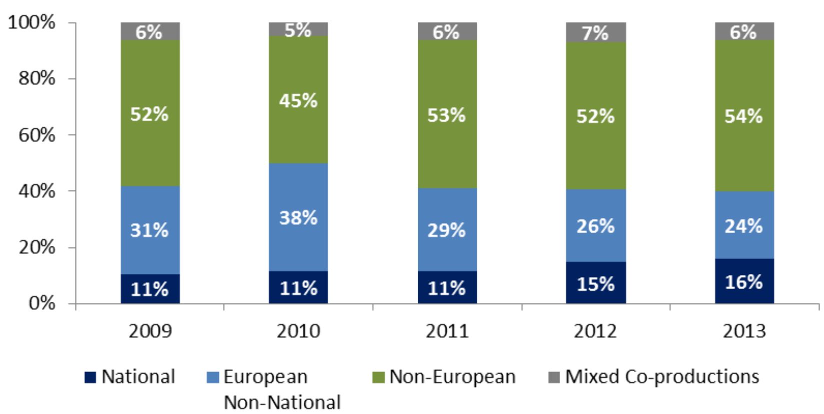
In Poland, the national fiction content on the channels consists mainly of TV series (in terms of broadcast hours) – more than 80%. The most important other European content on Polish TV is British.

Other European markets and those with important "foreign target" channels

Finland: European content strong on the national Finnish channels

For the purposes of the analysis, just four channels were covered in Finland (on the basis of the availability of channels monitored by ROVI). However these four represented 72,2% of the audience share in 2009. The levels of European content are above the European average. In particular non-national European content plays an important role in the fiction content offer on Finnish channels.

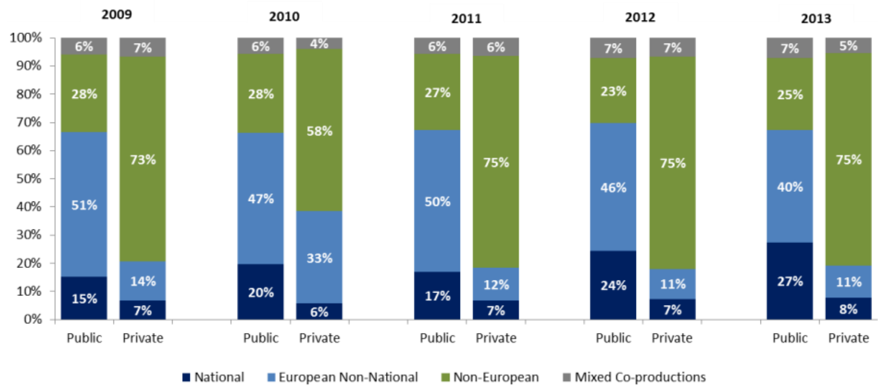
Fig 21: Proportion of national, European and non-European programming on Finnish national channels 2009-2013



Source: European Audiovisual Observatory on the basis of data from ROVI International

Again, the importance of public broadcasters in broadcasting national and European content is highlighted here. The proportion of national content broadcast on the public channels has been rising steadily over the five year period. The public channels also carry a huge proportion of content from other European countries although this has been decreasing slightly with the rise of national content on the channels.

Fig 22: Origin of programming, comparing public and private Finnish channels 2009-2013



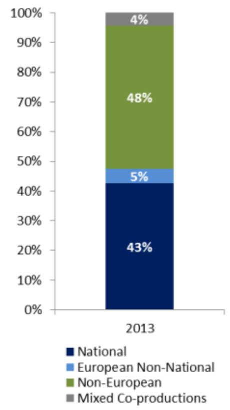
Source: European Audiovisual Observatory on the basis of data from ROVI International

In Finland, close to half of the national fiction content consists of TV series (in hours), while another third consists of Finnish feature films. European content on Finnish channels is overwhelmingly British, followed by mixed co-productions.

Portugal: High proportion of national content on Portuguese channels

Poland was not included in the global analysis (under 1.3, 1.4 and 1.5), as the data available for Portuguese channels just covered the years 2012 and 2013 (before which the channels were not included in the analysis of ROVI). However, when analysing the data we discovered that the ROVI coverage of Portugal only included the second half of 2012 and the two years were not comparable. Hence we just provide a snapshot of the situation in Portugal from 2013.

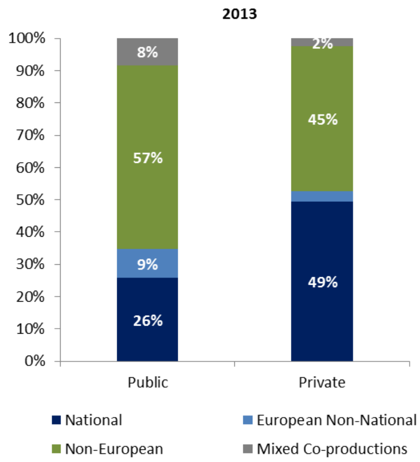
Fig 23: Proportion of national, European and non-European programming on Portuguese national channels 2013



Source: European Audiovisual Observatory on the basis of data from ROVI International

The analysis focuses on just four channels, which had a combined audience of 82% in 2009 (a share which has dropped to just over 60% in 2013). Portugal is the only example where the private channels are showing more national content (and higher overall European content) than the public channels. Unfortunately, we do not have the data to compare this over time.

Fig 24: Origin of programming, comparing public and private Portugal national channels 2013

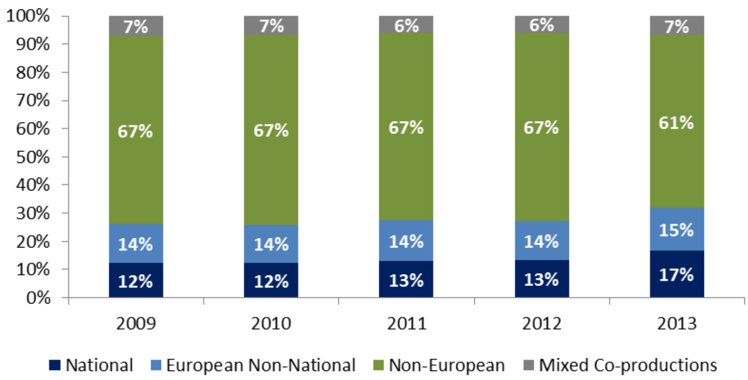


The national fiction content on the channels consists mainly of TV series – more than 80%, with national feature films making up about 10%. Important other European content on Portuguese TV include mixed co-productions, other co-productions, followed by British, Italian and Spanish content. One third of non-European content in Portugal is in the "other" category and presumably from Brazil.

The Netherlands

The Dutch channels[10] in the analysis show an increase in the proportion of national fiction works in 2013 (as compared to other years) and a corresponding decrease in the proportion of non-European fiction works. By 2013 the data is in line with the European averages.

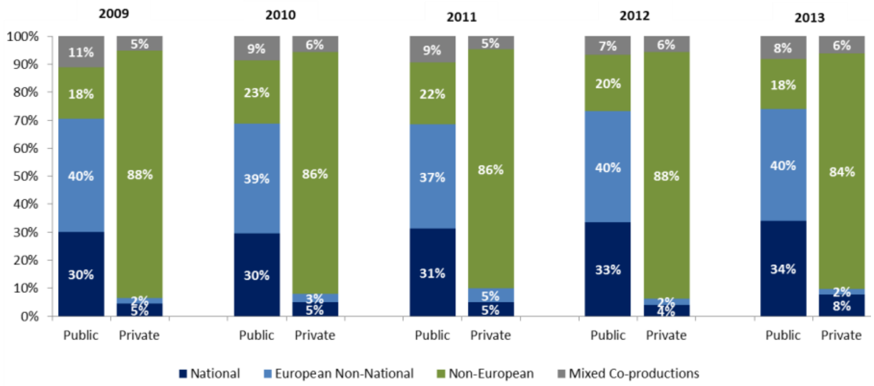
Fig 25: Proportion of national, European and non-European programming on Dutch national channels 2009-2013



Source: European Audiovisual Observatory on the basis of data from ROVI International

[10] Based on 8 channels which combined had an 72,8% daily audience share in 2009, according to data from EurodataTV (see table 1)

Fig 26: Origin of programming, comparing public and private Dutch national channels 2009-2013



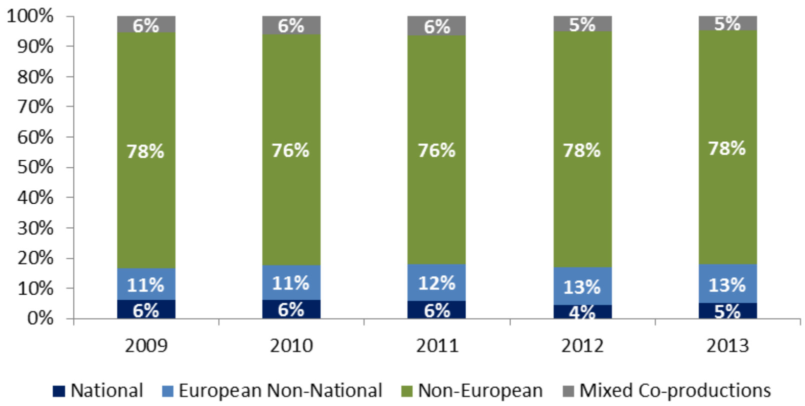
Source: European Audiovisual Observatory on the basis of data from ROVI International

In the Dutch case, the public channels' fiction content is overwhelmingly national and other European, with very little (less than 20% non-European content). In contrast, the private channels are reaching more than 85% of non-European fiction programming. More than half of Dutch national fiction programming on the Dutch channels is classified as TV series. European content on Dutch channels includes mixed co-productions, other European co-productions, other European content (not possible to specify), British and French content. Two of the private channels are "target channels" based in Luxembourg and targeting the Netherlands. No significant difference exists between the origin of content on these as compared to the other Dutch private channels.

Sweden: public broadcaster the driver of national and European content

The Swedish data is based on 5 channels, two of which are "target channels" established in the UK (one from Discovery and one from Viasat). The proportion of non-European content is much higher than in most other European countries and the levels of national content are very low. National content consists mainly of TV series and Swedish feature films.

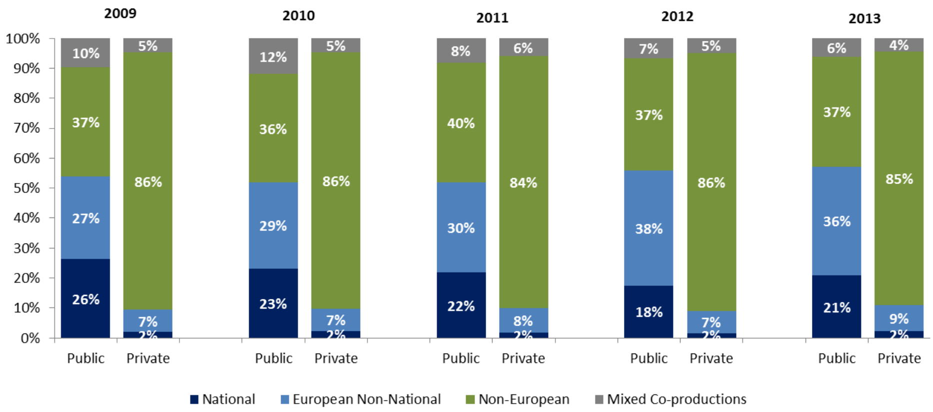
Fig 27: Proportion of national, European and non-European programming on Swedish national channels and "target channels" 2009-2013



Source: European Audiovisual Observatory on the basis of data from ROVI International

The second figure shows the importance of the public broadcasters with a high level of national content, and an even higher level of European content in comparison to the European picture. The private channels have a very high level of non-European content, more than 85%. Regarding the private channels, the 2 established in the UK have mainly US content, while the third established in Sweden has a higher level of European content. The European content shown on Swedish TV is mainly British, followed by mixed co-productions and European co-productions.

Fig 28: Origin of programming, comparing public and private Swedish channels and foreign "target channels" 2009-2013

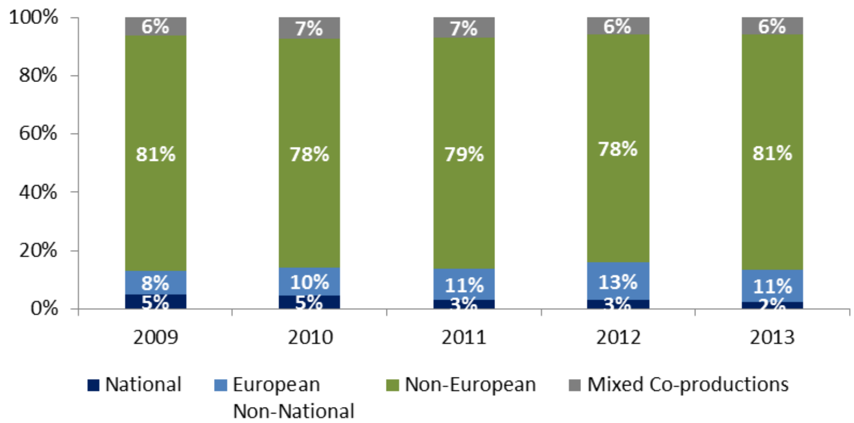


Source: European Audiovisual Observatory on the basis of data from ROVI International

Denmark:

The Danish data shows a dominance of non-European content on the main TV channels, at a level much higher than the European average. National content is extremely low and decreasing to just 2% in 2013.

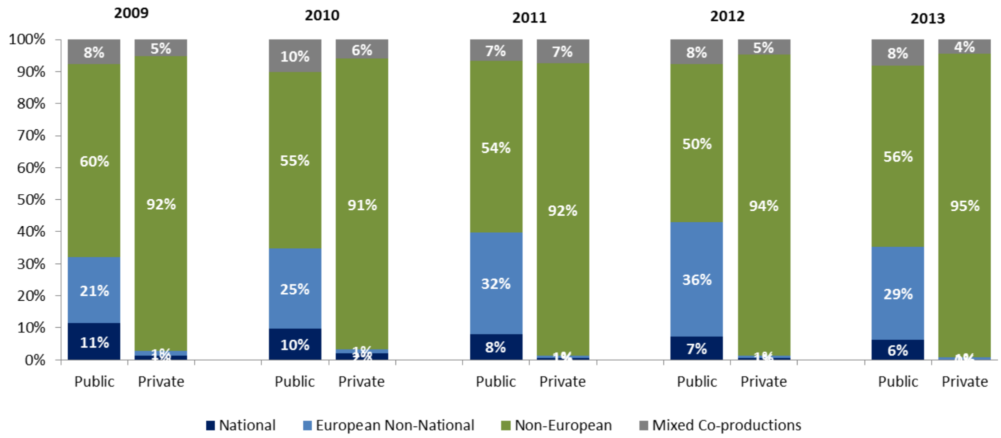
Fig 29: Proportion of national, European and non-European programming on Danish national channels and foreign "target channels" 2009-2013



Source: European Audiovisual Observatory on the basis of data from ROVI International

The comparison between public and private reveals that it is mainly the public channels who broadcast fiction works of national origin and of European origin, with the Danish data shows a dominance of non-European content on the main TV channels, at a level much higher than the European average. National and European content is extremely low on the private channels and decreasing to just 2% in 2013. Note that the three private channels in this sample are licensed in the UK, with two owned by Discovery communications, and the third owned by Viasat.

Fig 30: Origin of programming, comparing public channels and foreign "target channels" in Denmark 2009-2013



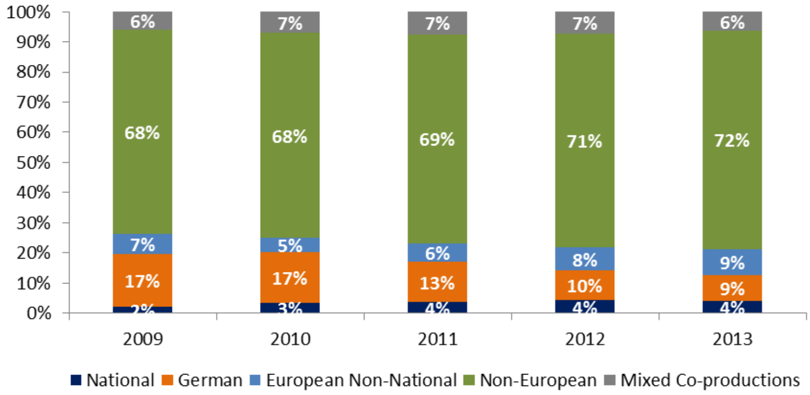
Source: European Audiovisual Observatory on the basis of data from ROVI International

Small European markets and the influence of foreign channels

Austria: German content and German channels of major importance in the market

The four Austrian channels in the sample have a combined daily audience share of around 40%. Here « spill-over » channels play an important role in the market. German channels have 30-35% of the Austrian daily audience share. The first fig (27) shows data for the Austrian channels, the second includes data for the German channels that hold an important share of the market.[11] The Austrian national content market is weak and accounts for less than 5% of fiction content with half being TV series, while about one fifth are Austrian feature films. The most important other European content is German (see fig 27), although this has reduced significantly while non-European content has increased.

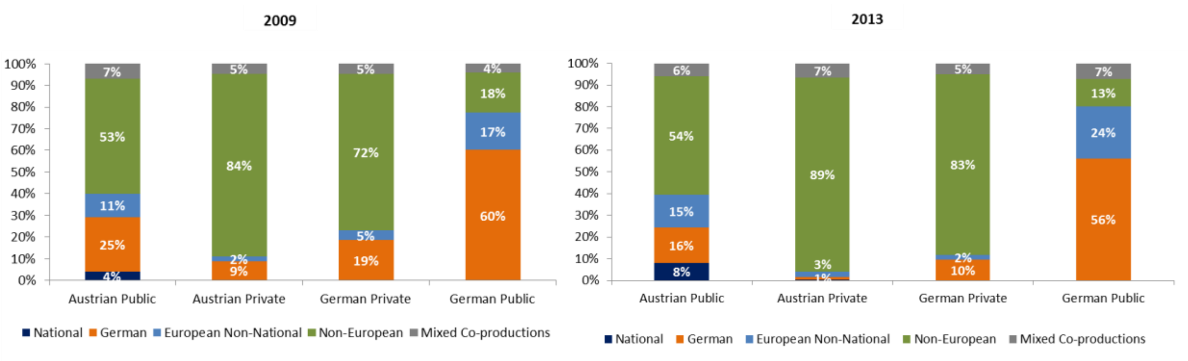
Fig 31: Proportion of national, German, European and non-European programming on Austrian national channels 2009-2013



Source: European Audiovisual Observatory on the basis of data from ROVI International

The figure below provides snapshots of 2009 and 2013. The private channels in the market (Austrian and German) have increased the proportions of non-European content over time. The complete picture of German content available to Austrian audiences is outlined in the graph.

Fig 32: Origin of programming on Austrian public/ private national channels, and German channels in Austria 2009-2013



Source: European Audiovisual Observatory on the basis of data from ROVI International

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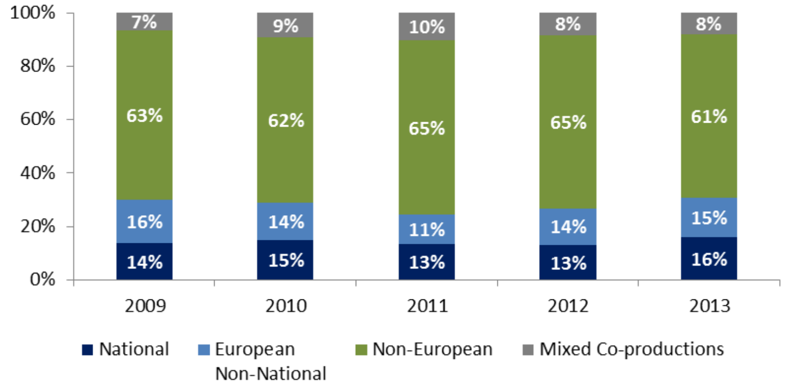
[11] Table one outlines those channels and their shares of the Austrian audience.

Belgium (VLG): Public channels broadcasting high levels of European content

The Belgian market is fragmented into different language spaces. The first tables represent the data for channels in the market for Flemish language media.[12] The proportions of European and non-European content here are similar to the European average in fig.29

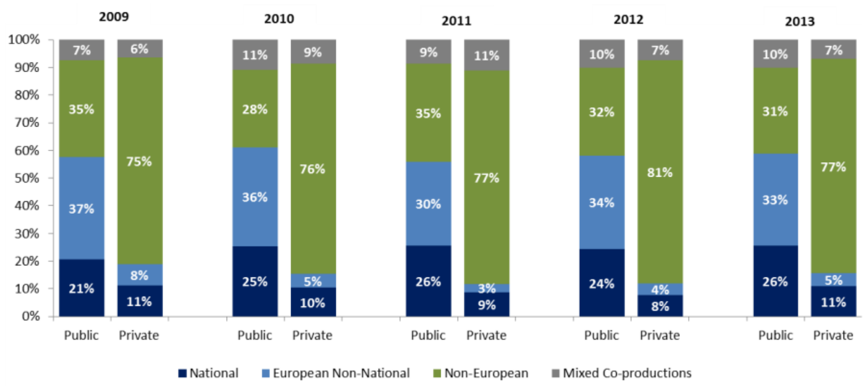
Fig 33: Proportion of national, European and non-European programming on Belgian (VLG) national channels 2009-2013



Source: European Audiovisual Observatory on the basis of data from ROVI International

Regarding the comparison between public and private, again in this case public channels have a much higher proportion of both national and non-national European content. The private channel data is similar to the data for the European sample of private channels.

Fig 34: Origin of programming, comparing public and private Belgian (VLG) channels 2009-2013



Source: European Audiovisual Observatory on the basis of data from ROVI International

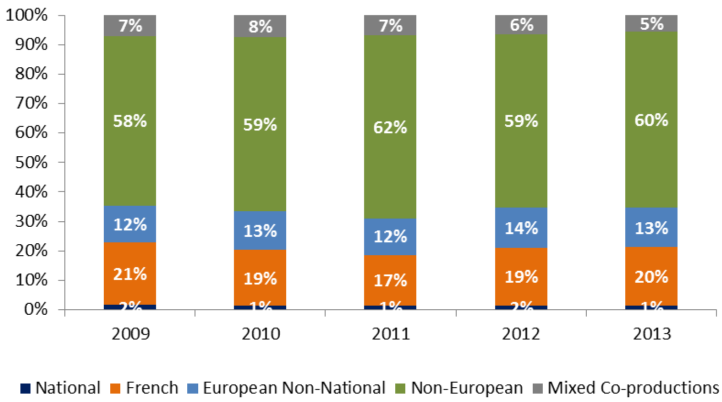
On the Belgian Flemish TV schedules the national fiction content consists mainly of TV series – more than 80%, with national feature films making up about 10%. The most important other European content is mixed co-productions, other European co-productions, British content, other European (not possible to specify) and French content.

[12] 6 channels are included that had a combined daily audience share of 73,7%, according to data from EurodataTV (see table 1)

Belgium (CFR): French content and French channels play an important role in the market

Alongside national channels, there are some significant channels licensed in Luxembourg that target the country.[13] French channels have a 30% market share. The first chart provides the global picture of programming on Belgian channels (and "target channels" established in Luxembourg), while the second will distinguish between national (including target) and French « over-spill » channels.

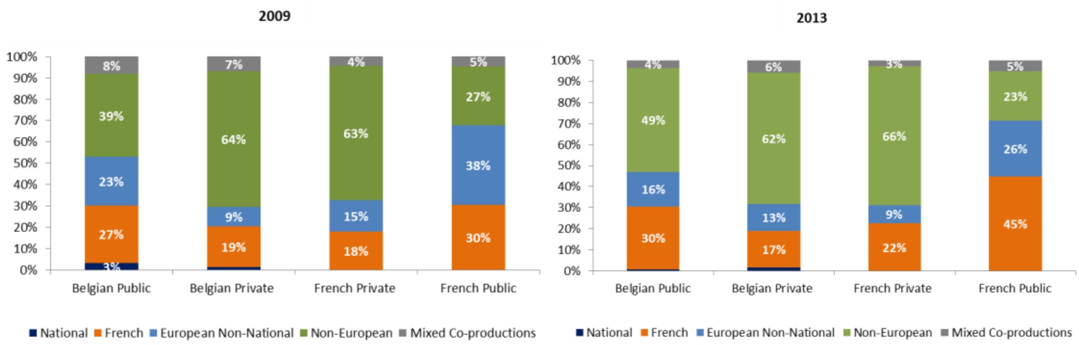
Fig 35: Proportion of Belgian national, French, European and non-European programming on Belgian (CFR) national channels and "target channels" 2009-2013



Source: European Audiovisual Observatory on the basis of data from ROVI International

National fiction content is less than 2% on average (with almost 40% being animation and 30% national feature films). The role of « other European » is very significant. Fiction works from France are by far the most important of the other European content (followed by mixed co-productions). Note that this is in relation to the national channels and not the channels from France that are widely viewed in the country. No major difference was noted between the national private and foreign target channels.

Fig 36: Origin of programming, comparing public/ private Belgian (CFR) channels (including target channels) and French channels on the market 2009 and 2013



Source: European Audiovisual Observatory on the basis of data from ROVI International

The figure above provides snapshots of 2009 and 2013. The complete picture of French content available to Belgian audiences is outlined in the graph.

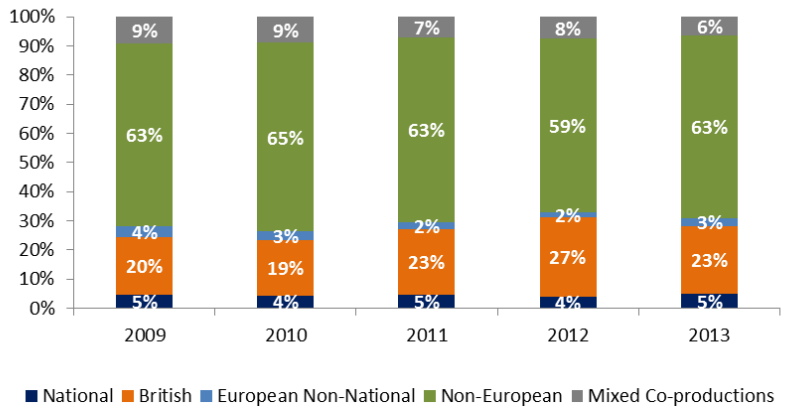
[13] These 7 channels (national and « foreign target » had a combined daily audience share of 51,7% in 2009, according to EurodataTV

Ireland: British content and British channels play an important role in the market

For Ireland, ROVI had included only the public channels in their data in 2009, 2010 and 2011. Hence the first figure only reflects the data on programming on public service channels. Here national fiction makes up just 5% of the programming, while a further quarter of the fiction programming is other European. This Irish content (in terms of hours) is almost 75% TV Series and a further 20% animation.

The most important other European content is overwhelmingly British, followed by mixed co-productions, other European co-productions.

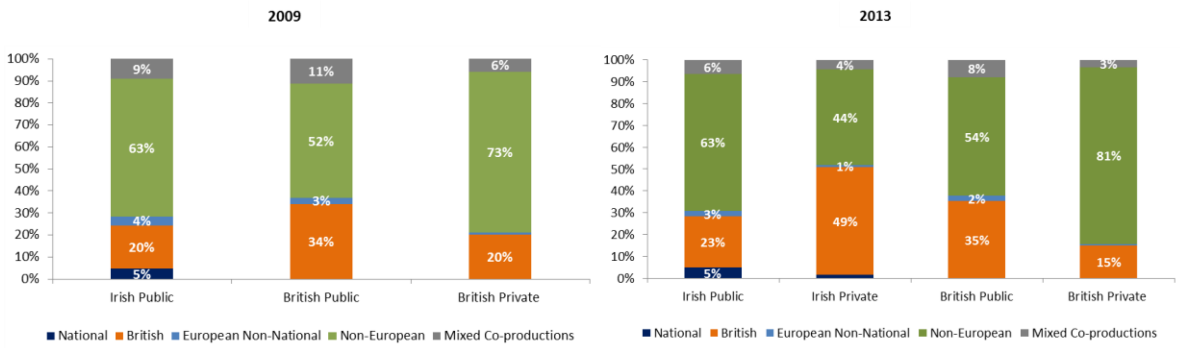
Fig 37: Proportion of national, European and non-European programming on Irish national channels 2009-2013



Source: European Audiovisual Observatory on the basis of data from ROVI International

As ROVI included the Irish private channel TV3 (in 2012 and 2013), we can represent this in the figure below that provides snapshots of 2009 and 2013. The Irish private channel TV3 is illustrated here as having a higher proportion of European fiction than the public channel in 2013. This content is however, almost exclusively British.

Fig 38: Origin of programming, comparing public/ private Irish channels and British channels on the market



Source: European Audiovisual Observatory on the basis of data from ROVI International

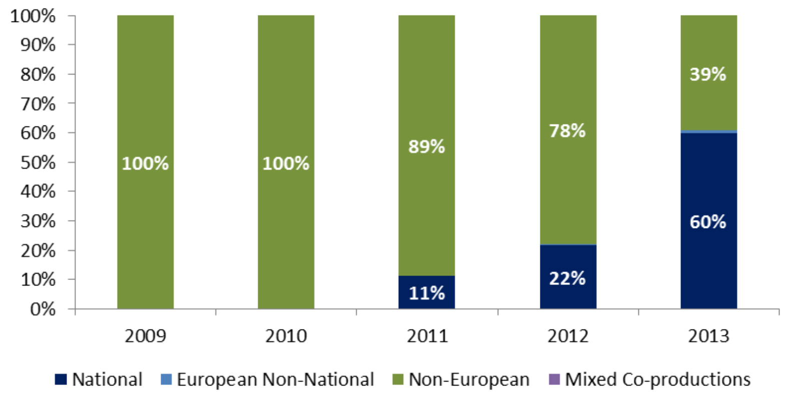
Audience shares in Ireland are very fragmented with national channels having 42% share of the market (compared to 50% in 2009). The rest of the audience shares are for the top British channels, and also the range of niche channels from the UK available over satellite and cable. The complete picture of British content available to Irish audiences is outlined in the graph.

Luxembourg

Despite being a very small country with only one significant channel, Luxembourg is the home of several of the target channels mentioned earlier – RTL channels targeting Belgium and the Netherlands, and the corporate home of important German media company RTL.

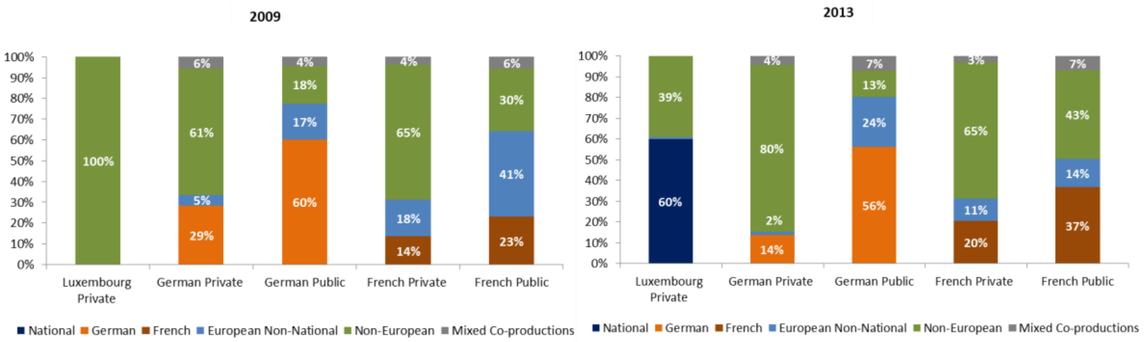
The audiences for the national channel RTL Télé Lëtzebuerg are around 10% and « spill-over » broadcasting from neighbouring countries make up the TV market. Until 2011, RTL Télé Lëtzebuerg broadcast mainly local news and magazine programmes with fiction content being almost 100% non-European. This has gradually changed with the increasing development of national content (TV series and animation). Neither German nor French content has any presence on the national TV channel.

Fig 39: Proportion of national, European and non-European programming on Luxembourg national channel 2009-2013



Source: European Audiovisual Observatory on the basis of data from ROVI International

Fig 40: Origin of programming, comparing private Luxemburg channel and French and German channels on the market



Source: European Audiovisual Observatory on the basis of data from ROVI International

With German channels having approximately 30% audience market share and the French channels more than 20%, Luxembourg is almost completely dependent on outside broadcasting markets for its TV content. The complete picture of German and French content available to Luxembourg audiences is outlined in the graph.

Table 1 : List of channels analysed in ROVI data and their audience shares

Country	Channels	Type	Daily audience share 2009/ %	Daily audience share 2013/%
AT - Austria (4)				
National channels (in sample)	ORF1	Generalist public	23,1	20,9
	ORF2	Generalist public	15,1	12,3
	ATV	Generalist private	3,5	3,3
	Puls 4	Entertainment private	1,9	3,4
subtotal			**43,6**	**39,9**
Other national (not in sample)			2,5	3,2
Total national			**46,1**	**43,1**
Neighbouring overspill channels	*Sat1*	*Generalist private*	*6,9*	*5,3*
	RTL	*Generalist private*	*5,8*	*5,3*
	Prosieben	*Generalist private*	*4,7*	*5,0*
	Vox	*Generalist private*	*4,4*	*3,9*
	ZDF	*Generalist public*	*3,9*	*4,3*
	ARD	*Generalist public*	*3,3*	*3,2*
	kabel eins	*Generalist private*	*2,8*	*2,5*
	RTL 2	*Generalist private*	*2,4*	*2,4*
Total audience			**80,3**	**75,0**
BE - Belgium (VLG) (6)				
National (in sample)	Een	Generalist public	32,1	30,5
	VRT Canvas	Generalist public	9,1	7,5
	Ketnet	Children public		
	VTM	Generalist private	20,9	17,8
	2BE	Entertainment private	5,6	5
	VT4/ Vier	Entertainment private	6,0	7,4
Total audience			**73,7**	**68,3**
BE- Belgium (CFR) (7)				
National channels (in sample)	RTBF - La 1	Generalist public	14,6	15,1
	RTBF - La 2	Generalist public	4,7	4,5
	RTL - TVI	Generalist private	20,9	19,5
	Be1	Film private	0,3	0,4
	AB3	Entertainment private	4,1	4,6
Total national			**44,6**	**44,1**
Target channels (in sample)	Club RTL	Entertainment private	4,7	4,1
	Plug RTL	Entertainment private	2,4	2,2
Total national and target			**51,7**	**50,4**
Neighbouring overspill channels	*TF1*	*Generalist private*	*16,5*	*16,1*
	France 2	*Generalist public*	*9,0*	*6,8*
	France 3	*Generalist public*	*6,1*	*5,0*
Total audience			**83,3**	**78,3**

Country	Channels	Type	Daily audience share 2009/ %	Daily audience share 2013/%
DE- Germany (12)				
National channels (in sample)	ARD	Generalist public	12,7	12,1
	BF	Generalist public	?	?
	ZDF	Generalist public	12,5	12,8
	ARTE	Cultural public	0,7	0,9
	Kika	Children public	1,4	1,2
	Kabel 1	Generalist private	3,9	4,0
	Pro 7	Generalist private	6,6	5,7
	RTL	Generalist private	12,5	11,3
	RTL 2	Generalist private	3,9	4,2
	Sat,1	Generalist private	10,4	8,2
	Super RTL	Children private	2,5	1,9
	Tele5	Entertainment private	1,0	0,9
Total audience			**68,1**	**63,2**
DK - Denmark (6)				
National channels (in sample)	DR 1	Generalist public	21,9	20,3
	DR 2	Generalist public	4,5	4,6
	TV2	Generalist public	29,3	23,3
subtotal			***55,7***	***48,2***
Other national (not in sample)			*10,7*	*20,7*
Total national			**66,4**	**68,9**
Target channels (in sample)	TV 3	Entertainment private	5,0	4,8
	Kanal 4	Entertainment private	1,8	1,8
	Kanal 5	Entertainment private	2,9	3,7
Total audience			**76,1**	**79,2**
ES- Spain (7)				
National channels (in sample)	TVE 1	Generalist public	16,4	10,2
	La 2	Generalist public	3,8	2,4
	Antena 3	Generalist private	14,7	13,4
	Tele 5	Generalist private	15,1	13,5
	Canal+	Entertainment private		
	Cuatro	Generalist private	8,2	6,0
	La Sexta	Generalist private	6,8	6,0
Total audience			**65,0**	**51,5**
FI - Finland (4)				
National channels (in sample)	YLE 1	Generalist public	21,4	25
	YLE 2	Generalist public	18,3	12
	MTV3	Generalist private	22,6	19
	Nelonen	Entertainment private	9,9	9
Total audience			**72,2**	**65,5**

Country	Channels	Type	Daily audience share 2009/ %	Daily audience share 2013/%
FR - France (9)				
National channels (in sample)	France 2	Generalist public	16,7	14
	France 3	Generalist public	11,8	10
	France 5	Cultural public	3,1	3
	Arte	Cultural public	1,7	2
	M6	Generalist private	10,8	11
	TF1	Generalist private	26,1	23
	Canal+	Generalist private	3,1	3
	NT1	Generalist private	1,4	2
	France 4	Entertainment public	1,1	2
Total audience			**75,8**	**68,9**
GB – United Kingdom (18)				
National channels (in sample)	BBC1	Generalist public	20,9	21,0
	BBC2	Generalist public	7,5	5,8
	BBC3	Entertainment public	1,2	1,5
	BBC4	Cultural public	0,5	0,9
	CBBC	Children public		
	Cbeebies	Children public		1,3
	Channel 4	Generalist public	6,7	4,9
	E4	Entertainment private	1,1	1,3
	Film Four	Film private	0,8	1,3
	Five	Entertainment private	4,9	4,1
	ITV2	Entertainment private	1,9	2,2
	ITV3	Entertainment private	1,6	2,4
	ITV1 Network	Generalist private	17,8	15,3
	Comedy Central	Entertainment private		
	Sky One	Entertainment private	1,1	0,9
	Sky Two	Entertainment private		
	Pick TV/ Sky 3	Entertainment private	0,7	1,0
	Dave/ UK Gold	Entertainment private		21,0
Total audience			**66,7**	**63,9**
IE – Ireland (3)				
	RTE1	Generalist public	24,2	20
	RTE2	Generalist public	10,2	7
	TV3	Generalist private	11,9	11
subtotal			**46,3**	**37,9**
Other national (not in sample)			4,3	4,5
Total national			**50,6**	**42,4**
Neighbouring overspill channels	*BBC1*	*Generalist public*	*5,1*	*4,0*
	BBC2	*Generalist public*	*2,9*	*1,8*

Country	Channels	Type	Daily audience share 2009/ %	Daily audience share 2013/%
	UTV/ (ITV 1)	*Generalist private*	*4,4*	*2,8*
	Channel 4	*Generalist public*	*3,6*	*1,9*
	Sky One	*Entertainment private*	*2,9*	*1,8*
Total audience			**69,5**	**54,7**
IT- Italy (7)				
	Canale 5	Generalist private	20,7	15
	Italia 1	Generalist private	10,4	7
	RAI1	Generalist public	21,2	18
	RAI2	Generalist public	9,2	7
	RAI3	Generalist public	8,9	7
	Rete4	Generalist private	7,8	5
	La 7	Generalist private	3,0	4
Total audience			**81,2**	**62,2**
LU- Luxembourg (1)				
National channels (in sample)	RTL Télé Lëtzebuerg	Generalist private	10,7	10
Total national			**10,7**	**10**
Neighbouring overspill channels	TF1	Generalist private	8,9	8
	RTL	Generalist private	7,0	6
	Prosieben	Generalist private	7,0	8
	ZDF	Generalist public	5,3	6
	ARD	Generalist public	6,2	5
	M6	Generalist private	4,5	6
	Sat1	Generalist private	3,6	3
	France 2	Generalist public	3,8	4
	VOX	Entertainment private	2,9	2
Total audience			**59,9**	**59,0**
NL – Netherlands (8)				
National channels (in sample)	NPO1 (Ned1)	Generalist public	20,0	19
	NPO2 (Ned 2)	Generalist public	6,7	6
	NPO3 (Ned 4)	Generalist public	7,2	7
	Net5	Entertainment private	4,3	4
	SBS6	Generalist private	10,9	7
	Veronica	Entertainment private	3,2	3
subtotal			52,3	46
Other national (not in sample)			2,5	4
Total national			54,8	50
Target channels (in sample)	RTL4	Generalist private	13,6	15
	RTL5	Entertainment private	4,4	3
Total audience			**72,8**	**67,6**

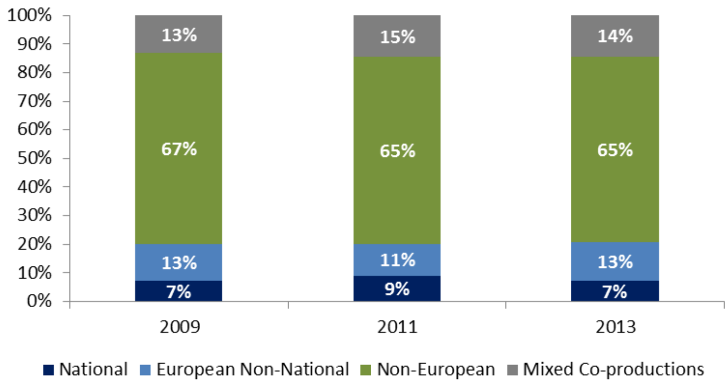
Country	Channels	Type	Daily audience share 2009/ %	Daily audience share 2013/%
PL – Poland (4)				
National channels (in sample)	TVP 1	Generalist public	20,9	13
	TVP 2	Generalist public	15,4	10
	Polsat	Generalist private	14,8	12
	TVN	Generalist private	15,9	13
Total audience			**67,0**	**48,3**
PT – Portugal (4)				
National channels (in sample)	RTP 1	Generalist public	24,0	13,1
	RTP 2	Generalist public	5,8	2
	SIC	Generalist private	23,4	21
	TVI	Generalist private	28,7	25
Total audience			**81,9**	**61,2**
SE – Sweden (5)				
National channels (in sample)	SVT 1	Generalist public	20,9	23
	SVT 2	Generalist public	7,5	7
	TV4	Generalist private	19,5	20
subtotal			47,9	50
Other national (not in sample)			12,9	14
Total national	Total Sweden		**60,8**	**64**
Target channels (in sample)	*TV3*	*Entertainment private*	*8,4*	*6*
	Kanal 5	*Generalist private*	*7,2*	*6*
Total audience			**76,4**	**76,2**
Total channels in ROVI sample	105	Of which 45 are public	Of which 60 are private	
Total channels used for European overview (2009-2013)	96	Of which 41 are public	Of which 55 are private	
Notes				
- Irish channel TV3 only measured from 2012 and dealt with on Irish country analysis only				
- Portuguese channels only measured from 2012 and dealt with on Portuguese country analysis only				
- Polish channels measured 2010-2013 and dealt with on Polish country analysis only				

OBS based on EurodataTV Worldwide for audiences

1.7. Focus on film channels 2009, 2011, 2013

This section provides a very brief overview of the proportions of European and non-European content on 14 film channels during the period 2009-2013 (the cultural channel ARTE has been included). The global picture outlined in the fig below shows that proportion of non-European films is actually higher overall on the specialised film, channels than on the broad list of 96 channels outlined in figure, page 6.

Fig 41: Origin of total films (feature, TV films, Shorts) on 15 film / cultural channels



A possible explanation for this may be that pay film channels show less European content. The tables illustrate the ownership of the channels and whether they are free or pay channels.

Table 2: Feature films on 14 film/cultural channels

Country / channels	Ownership	Access/ platform	Feature films on TV		
			European	Mixed co-productions	Non-European
Prime Action (BE)	Telenet/ Liberty Global	Pay/ cable	13,4%	11,0%	75,6%
Prime Star (BE)	Telenet/ Liberty Global	Pay/ cable	19,7%	14,5%	65,8%
ARTE (DE)	ARTE	Free DTT	**55,6%**	13,5%	30,9%
SKY Cinema (DE)	Sky Deutschland	Pay Sat	7,9%	14,8%	77,4%
SKY Action (DE)	Sky Deutschland	Pay Sat	8,1%	15,8%	76,1%
SKY Emotion (DE)	Sky Deutschland	Pay Sat	14,6%	15,1%	70,3%
ARTE (FR)	ARTE	Free DTT	**54,3%**	15,0%	30,8%
Ciné+ Classic(FR)	Canal+	Pay cab/sat/IPTV	**64,3%**	6,5%	29,2%
Ciné+ Premier (FR)	Canal+	Pay cab/sat/IPTV	**50,9%**	17,6%	31,5%
Film Four (GB)	Channel 4	Free DTT	**23,8%**	19,0%	57,2%
Sky Movies Action/Thriller (GB)	Sky Plc	Pay Sat	1,1%	13,0%	85,9%
Sky Movies Drama (GB)	Sky Plc	Pay Sat	6,2%	14,4%	79,5%
Sky Movies Family (GB)	Sky Plc	Pay Sat	2,8%	14,0%	83,2%
TCM (GB)	Turner Broadcasting		7,4%	7,4%	85,2%
Film 1 Premiere (NL)	Sony Pictures television	Pay cab/sat/IPTV	17,8%	15,4%	66,8%

OBS based on ROVI International data

In the case of feature films (table 2), free channels such as ARTE and Channels 4 (that both have a cultural focus) have a higher level of European content in general than the pay channels with around 55% of films on ARTE being European and 24% on Channel 4. The exception to this lies with the French pay channels of Canal+ which both have more than 50% European feature films in the genre group.

For TV films (table 3), the percentages are even higher regarding European content on a wide range of channels. This is in line with the findings for TV films on the basis of the 96 channels, as outlined in fig 6 on page 9. Several of the pay channels still have a very high level of non-European TV films.

Table 3: TV films on 14 film/cultural channels

Country / channels	Ownership	Access/ platform	TV films		
			European	Mixed co-productions	Non-European
Prime Action (BE)	Telenet/ Liberty Global	Pay/ cable	4,0%	33,0%	63,0%
Prime Star (BE)	Telenet/ Liberty Global	Pay/ cable	9,2%	29,7%	61,1%
ARTE (DE)	ARTE	Free DTT	**75,1%**	11,6%	13,3%
SKY Cinema (DE)	Sky Deutschland	Pay Sat			100,0%
SKY Action (DE)	Sky Deutschland	Pay Sat	**47,6%**		52,4%
SKY Emotion (DE)	Sky Deutschland	Pay Sat		24,9%	75,1%
ARTE (FR)	ARTE	Free DTT	**75,6%**	10,6%	13,7%
Ciné+ Classic(FR)	Canal+	Pay cab/sat/IPTV		68,7%	31,3%
Ciné+ Premier (FR)	Canal+	Pay cab/sat/IPTV	**100,0%**		
Film Four (GB)	Channel 4	Free DTT	**41,4%**	8,1%	50,5%
Sky Movies Action/Thriller (GB)	Sky Plc	Pay Sat		10,5%	89,5%
Sky Movies Drama (GB)	Sky Plc	Pay Sat		0,4%	99,6%
Sky Movies Family (GB)	Sky Plc	Pay Sat			100,0%
TCM (GB)	Turner Broadcasting		**26,7%**		73,3%
Film 1 Premiere (NL)	Sony Pictures television	Pay cab/sat/IPTV	8,0%	13,2%	78,8%

OBS based on ROVI International data