

Traditional broadcasting – still relevant?

Media services in Poland



Prague, 9 June 2016

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Poland



- area – 312 600 km²
- population – 38,5 m
- EU member - 2004

Public service media

Telewizja Polska



Television



- 9 DTT channels:
TVP₁, TVP₂, TVP INFO, TVP 3, TVP Kultura, TVP Historia, TVP Rozrywka, TVP Polonia, TVP ABC;
- 3 satellite channels:
TVP Sport, TVP HD, TVP Seriele

Public service media

Radio



Polskie Radio



- 4 nation-wide channels:
JEDYNKA, DWÓJKA, TRÓJKA, CZWÓRKA
- 1 channel for the listeners abroad:
RADIO DLA ZAGRANICY
- 3 only-digital (DAB+) channels:
PR24, RADIO RYTM, RADIO DZIECIOM

17 regional companies + 8 city channels

Commercial broadcasters

Television

15 DTT

82 specialized satellite channels

240 cable channels

7 DTT regional



Radio

3 nation-wide stations

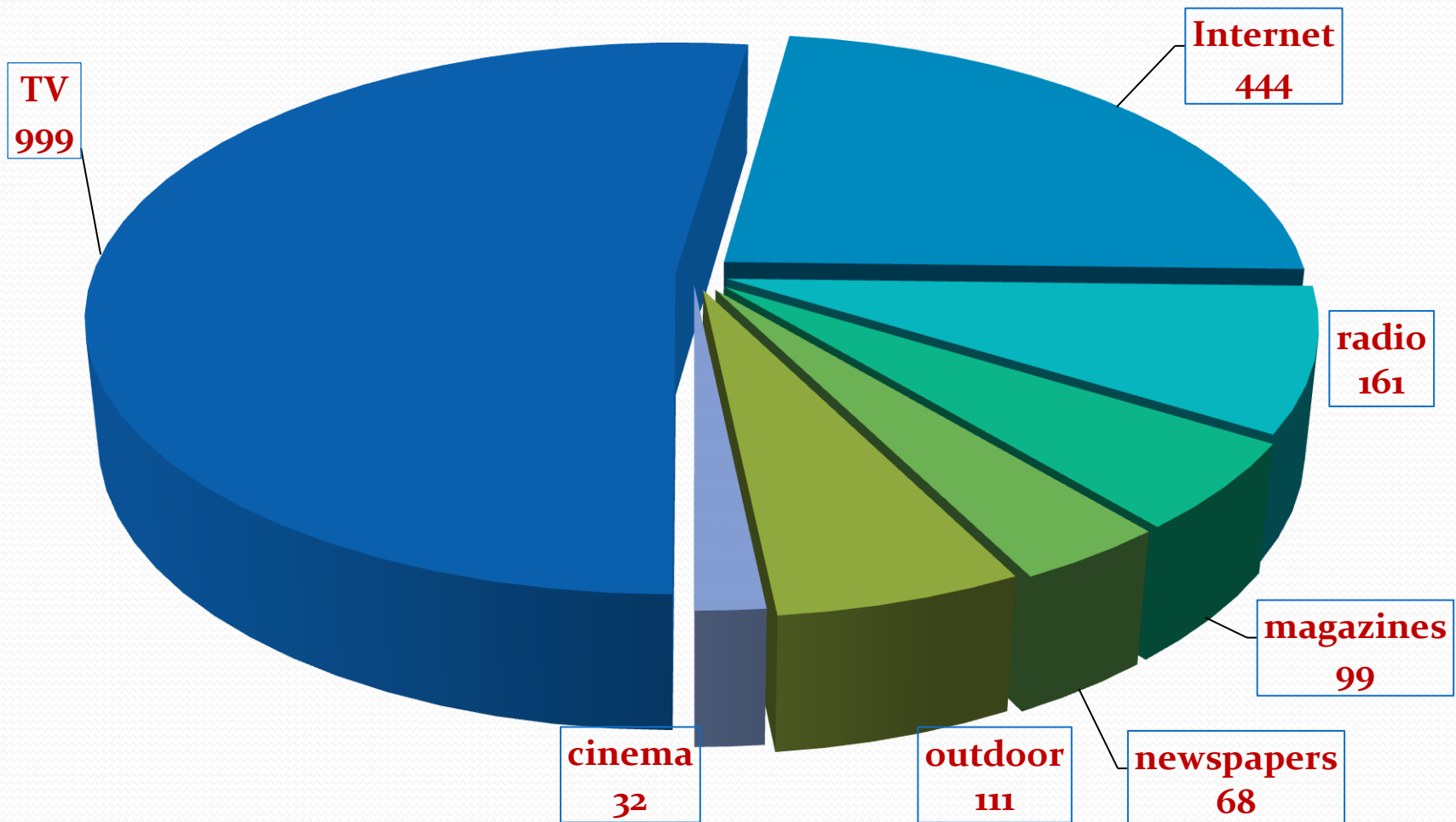
4 networks in big cities

231 local broadcasters

Media market in Poland

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value - advertising revenues (m EUR)



The biggest players on Polish TV market



Broadcasters' presence in new media

- **Internet platforms;**
- **VoD** offered by traditional broadcasters, cable and satellite operators – 73% of Internet users;
- **Offer for mobile TV** – 41% watch TV via tablet or smartfon,
- **Hybrid TV** (TVP SA, *Grupa ZPR Media*, *Stopklatka*).

In 2015 – 1,2 m TV sets with active hybrid platform of TVP SA;

- **Digital Radio DAB+** initiated by public radio PR SA covers half territory of Poland (but just 1,7% sets)

Behaviour of media consumers

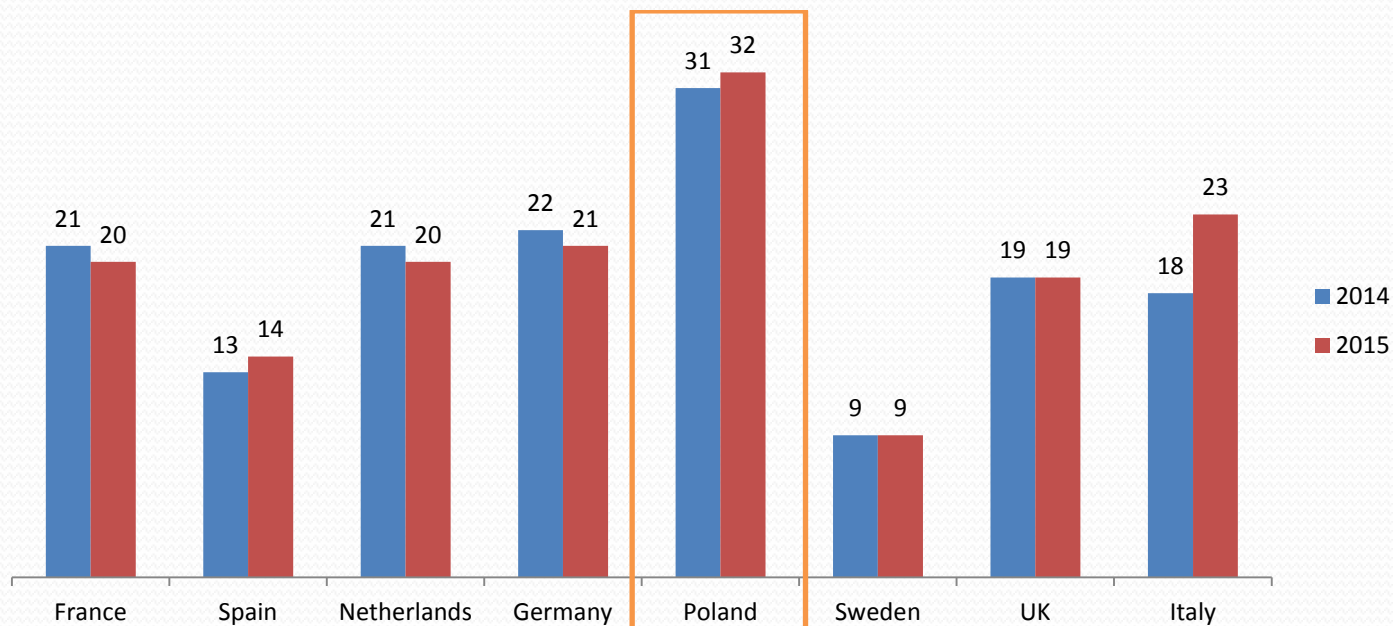
In Poland TV is still the most important medium:

- 96,7% households have TV sets - 56% households equipped in laptop/40% in desktop;
- average time of TV watching- 4 h 23 min.;
- consumption of traditional TV and radio increases with age;
- multiscreening concerns 70% of Internet users, BUT still they use traditional TV set and watch FTA TV (84% of Internet users);

Listening to the radio in Poland

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In Europe declining level of radio audience, BUT NOT in Poland where 75,5% listen to the radio regularly with average weekly time – 30 h, which exceeds European average of 1/3;



Source: Ofcom, *International Communications Market Report 2015*

Challenges for the regulator

- Convergence of the media market;
- Still different obligations for different media;
- Difficulties in identifying and monitoring online services;
- Protection of minors and other media consumers - still effective?
- a growing need for media education;
- public service media – need to support broadcasters with public remit BUT PSM have to redefine their strategies and should go deeper in new technologies;
- new AVMS directive responds to dynamic changes in the market BUT may paradoxically can pull away the audience from traditional media.

Traditional broadcasting – still relevant?

YES

383 mln Europeans from 48 countries still watch traditional TV - an increase of 15 min in 10 years!

Thank you



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