



**Comparative study on the impact of control measures on the television advertising markets.**

**REPORT : UNITED STATES**

United States

## INTRODUCTION

**This report** is aimed at comparing the legal data on the one hand and the economic data on the other hand related to the television advertising market in order to assess the impact of the applicable regulation on the sector's economy.

We have followed the regulatory structure of the Directive in order to:

1. remind the applicable rules in the United States and compare them with the regulatory standards foreseen by the Directive
2. confront those rules with the economic data issued from CARAT's reports (cf « *Quantitative impact of the regulation on TV advertising markets in EU Member States, EEA countries, the new Member States and a number of third countries* »)
3. draw a first list of conclusions on the impact of regulation on the television advertising market or raise some questions for future analysis.

The present study is based on 2003 data, as a reference year, compared with 2002.

As mentioned in the call for tender documentation (ref. 2003/S 107 - 095378 DG EAC 44/03) and Carat's proposal, the selection of countries covered by the study has been based on local specificities, in order to guarantee that the studied landscapes are representative.

The notion "Applicant countries" includes Czech Republic, Hungary, Poland, Romania and Turkey, since during the reference year of the study (2003) the first three countries, which are now Member States, were still candidate members. The reader should also take into account that the notion "European Union Countries" concerns data and analysis for 10 Member States, on the condition the necessary basic information is available.

In the report figures referring to "average data" were calculated taking into account the weight of every country (population) and the TV viewing time of their population (Weighted average).

For the calculation of the "average duration of the interruptions" (tables 4,5,7), the channels without advertising have been excluded (e.g.: UK, Sweden and Germany during prime time). These countries have been taken into consideration in the "average number of interruptions per hour" in tables 7A and 7B (all channels).

When data are not available, the following symbol "--" is indicated. When data are available but results are zero, the following symbol "0" is indicated.

There are no standard figures available on the number of interruptions by type of programme, except in *Canada, Japan, USA, Poland and Belgium* where a specific analyse has been conducted (see Tab 6, 8 and 9 in the concerned report of these 5 countries).

In this report and like the Economical Report, all figures are based on national networks. So, despite all our efforts, measurements of pay TV's are unavailable.

The reader should bear in mind that certain economic patterns of the national markets are not always the direct, or indirect, consequence of the regulation. Other parameters have an influence on the economic situation of the studied media, in particular the overall volume of advertising investments.

The methodological explanatory note provides for useful indications to fully understand the way audience and advertising investments have been measured.

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<b><u>GENERAL INFORMATION</u></b>
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## **1- The audiovisual landscape**

### Definitions

#### **Audience rating**

The « Rating » (%) is the portion of the audience which defines the average percentage of persons (adults universe) watching television during a defined period of time.

#### **Prime time**

Day part showing the highest individuals/households interest for TV watching ; this concept does not have a standard definition across the Member States, prime time slots are specific for each country and usually correspond to the end of the working hours till the end of the “social” evening.

#### **Adult population**

The adult definition is not a stable standard and may vary from one country to another. Usually the definition of “adult” corresponds to mature teenagers and older population. Often the legal definition of a “child” or “minor” does not correspond to the definitions in use in the advertising market.

#### **Adult population universe**

Number of individuals corresponding to the definition of “adult population” in a given country.

**Audience Rating, day parts and target definitions (period 2003)**

**Average Prime vs. All Day (index):** ratio obtained by the division of the “average rating – all day” by the “average rating - prime time”. Gives an indication of how more important is the audience during prime time compared with the rest of the day.

**Average Prime part :** proportion of the Prime time versus All Day, in terms of audience (expressed by the “rating” factor). This proportion is weighted by the prime time duration.

TAB 1	USA	European Union Countries (10)	Applicant countries (5)	Countries Outside EU (3)	All Countries Observed (18)
Adult population definition	18+	13/16+	15/18+	18/20+	13/20+
Adult population universe	211.400.000	277.802.353	96.837.599	320.470.074	695.110.026
Average Rating - All Day*	25,5%	14,0%	16,7%	23,4%	18,7%
Average Rating - Prime Time*	40,8%	37,4%	39,8%	40,6%	39,2%
Prime Time slots definitions	M-S 20:00-22:59 Su 19:00-22:59	18:55-23:00	18:30-23:00	19:00-23:00	19:00-23:00
Average Prime vs All Day (index)*	160	270	238	177	222
Average Prime part*	21%	34%	38%	26%	31%

\* Weighted averages (cf. introduction)

Source : Carat

## 2- Socio economic data (2003)

TAB 2	USA	European Union Countries (10)	Applicant countries (5)	Countries Outside EU (3)	All Countries Observed (18)
Total Adv. Investments All Media (000 €)	107.030.038	106.902.530	14.958.765	153.876.973	275.738.268
Total TV Invest. (000 €)	72.045.904	37.370.852	10.518.887	88.420.354	136.310.092
Part of TV Invest.*	67,3%	35,0%	70,3%	57,5%	49,4%
Share of Top 5 channels on. Total TV Invest.*	25,3%	84,4%	82,5%	31,6%	50,0%
Average Top 5 Channels Audience Share*	41,4%	60,5%	72,1%	50,8%	57,7%
Adults population universes	211.400.000	277.802.353	96.837.599	320.470.074	695.110.026
GDP (mo €)	9.727.723	8.668.867	601.106	14.296.881	23.566.853
Average Total Adv. Invest. All Media / GDP*	1,10%	1,23%	2,49%	1,08%	1,17%
Average Total TV Adv. Invest. / GDP*	0,74%	0,43%	1,75%	0,62%	0,58%
Average Adv. Invest. / inhab. (€ per year)	506,3	384,8	154,5	480,2	396,7
Average TV Adv. Invest. / inhab.* (€ per year)	340,8	134,5	108,6	275,9	196,1

\*Weighted averages (cf. introduction)  
source : Carat (Eurostat and local private sources)

### 3- Types of broadcast and Audience Shares

#### Audience Shares

Share (%) of each channel of total TV audience.

#### Channels

All channels which data are available.

Tab. 3A

Adults

USA	Name	Status	2003
<b>Average Rating Audience % TOTAL TV (1)</b>			<b>25,5%</b>
			<b>of which :</b>
<b>Channels with national coverage</b>	A&E Network	Pay TV (including adv. breaks)	1,6%
	ABC Family Channel	Pay TV (including adv. breaks)	0,6%
	<b>ABC Network</b>	Commercial channel free to air	9,0%
	American Movie Classic	Pay TV (including adv breaks)	-
	Animal Planet	Pay TV (including adv breaks)	-
	BET	Pay TV (including adv breaks)	-
	BRAVO	Pay TV (including adv breaks)	-
	Cable News Network	Pay TV (including adv. breaks)	1,7%
	<b>CBS Network</b>	Commercial channel free to air	11,1%
	CMT	Pay TV (including adv breaks)	-
	CNBC	Pay TV (including adv. breaks)	0,5%
	COMEDY CENTRAL	Pay TV (including adv breaks)	-
	COURT TV	Pay TV (including adv breaks)	-
	DISNEY CHANNEL	Pay TV (including adv breaks)	-
	E! Entertainment TV	Pay TV (including adv breaks)	-
	ESPN NEWS	Pay TV (including adv breaks)	-
	ESPN -Total Sports Network	Pay TV (including adv. breaks)	1,7%
	ESPN2	Pay TV (including adv. breaks)	0,6%
	FOOD NETWORK	Pay TV (including adv breaks)	-
	<b>FOX Network</b>	Commercial channel free to air	8,4%
	FOX NEWS CHANNEL	Pay TV (including adv breaks)	-
	FX	Pay TV (including adv breaks)	-
	GAME SHOW NETWORK	Pay TV (including adv breaks)	-
	GREAT AMERICA COUNTRY	Pay TV (including adv breaks)	-
	HALLMARK CHANNEL	Pay TV (including adv breaks)	-
	Headline News	Pay TV (including adv. breaks)	0,6%
	HOME AND GARDEN	Pay TV (including adv breaks)	-
	Lifetime Television	Pay TV (including adv. breaks)	2,5%
	MSNBC	Pay TV (including adv breaks)	-
	MTV: Music Television	Pay TV (including adv. breaks)	1,2%
	MTV2	Pay TV (including adv breaks)	-
	<b>NBC Network</b>	Commercial channel free to air	10,4%
	Nick-At-Nite	Pay TV (including adv. breaks)	1,7%
Nickelodeon	Pay TV (including adv. breaks)	1,7%	
<b>Paxson Communications</b>	Commercial channel free to air	1,1%	

Tab. 3B

Adults

USA	Name	Status	2003
<b>Average Rating Audience % TOTAL TV (1)</b>			<b>25,5%</b>
			<b>of which :</b>
	PBS	Public service	-
	SCI FI CHANNEL	Pay TV (including adv breaks)	-
	SOAPNET	Pay TV (including adv breaks)	-
	SPEED CHANNEL	Pay TV (including adv breaks)	-
	Spike TV	Pay TV (including adv. breaks)	1,0%
	TBS Network	Pay TV (including adv. breaks)	2,4%
	TBS SUPERSTATION	Pay TV (including adv breaks)	-
	The Cartoon Network	Pay TV (including adv. breaks)	1,2%
	The Discovery Channel	Pay TV (including adv. breaks)	1,0%
	THE GOLF CHANNEL	Pay TV (including adv breaks)	-
	THE HEALTH NETWORK	Pay TV (including adv breaks)	-
	The History Channel	Pay TV (including adv. breaks)	1,1%
	The Learning Channel	Pay TV (including adv. breaks)	1,6%
	THE TRAVEL CHANNEL	Pay TV (including adv breaks)	-
	The Weather Channel	Pay TV (including adv. breaks)	0,6%
	TNN	Pay TV (including adv breaks)	-
	TOON DISNEY	Pay TV (including adv breaks)	-
	Turner Network Television	Pay TV (including adv. breaks)	3,0%
	TV LAND	Pay TV (including adv breaks)	-
	<b>UPN Network</b>	Commercial channel free to air	2,5%
	USA Network	Pay TV (including adv. breaks)	2,3%
	Vh-1	Pay TV (including adv. breaks)	0,6%
	<b>WB Network</b>	Commercial channel free to air	2,7%
	WGN CABLE	Pay TV (including adv breaks)	-
<b>Local channels</b>	-		-
<b>Non domestic Channels</b>	-		-
<b>International Channels</b>	-		-
<b>Other channels</b>	CINEMAX	Pay TV (no advertising)	-
	DIRECTV	Pay TV (including adv. breaks)	-
	ECHOSTAR	Pay TV (including adv. breaks)	-
	HBO	Pay TV (no advertising)	-
	SHOWTIME	Pay TV (no advertising)	-
	THE MOVIE CHANNEL	Pay TV (no advertising)	-
	Others	-	25,5%
<b>Total</b>			<b>100,0%</b>

(1) Definitions : Please, refer to Tab. 1 of this report  
Highlighted channels are covered in the economic report.

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<b><u>COMPARISON BETWEEN THE LEGAL AND THE ECONOMIC DATA</u></b>
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**I. ADVERTISING IDENTIFICATION**  
(Article 10 Directive)

**1. Separation of advertising from the programmes by optical and/or acoustic means**  
(Art.10.1 of the Directive)

Identification of advertising and separation between advertising and programmes

US regulation requires that the distinction between programming and advertising is clear. It does not require the use of optical and/or acoustic means, nor does it regulate the interface between advertising and programming (ex. a screen in between), except that advertising during programmes targeted towards children must observe a 5 second gap or “*bumper*” between programme and advertising.

**Impact on commercial practices**

The majority of advertising and teleshopping spots are included in traditional blocks which are kept separate from the programme. The average duration of a block is short compared to the European average (141 seconds vs. 185 seconds) As will be explained in detail further in this report the frequency of these interruptions is higher in the US than in the EU member states.

There is a separation between programme and advertising but it is done less clearly (no use of a special “advertising” announcement screen or jingle in between programme and advertising) and the transfer from programme to advertising block is much quicker. TV advertising is therefore more intrusive for the viewer.

Split screen techniques are used only exceptionally by the key mainstream national channels (top 6) and their use is not measured. These techniques are mainly used by iDTV channels /pay TV channels- via a digital mode- and not by the mainstream national channels. (see p.24, tab.7)

**Average duration of advertising interruptions**  
**(seconds - all day)**

TAB 4A	Austria	Belgium N/S	France	Germany	Ireland	Italy	Netherlands	Spain	Sweden	United Kingdom	European Union Countries*
<b>Break durations (#sec) - Total</b>	246	129	165	199	-	188	185	136	143	236	<b>185</b>
<b>Break durations (#sec) of Public Channels</b>	173	90	140	126	-	157	221	129	0	0	<b>140</b>
<b>Break durations (#sec) of Private Channels</b>	257	146	202	201	-	197	180	147	143	236	<b>195</b>
<b>Break durations (#sec) of Pay TV(including advertising)</b>	-	83	107	-	-	-	-	101	-	-	-

\* weighted average (cf. introduction)

Note that Telepromotions are excluded of these figures and have an average duration of 88 seconds in Italy.

TAB 4B	Czech Republic	Hungary	Poland	Romania	Turkey	Canada E/F	Japan	USA	European Union Countries*
<b>Break durations (#sec) - Total</b>	132	167	120	83	315	-	105	141	<b>185</b>
<b>Break durations (#sec) of Public Channels</b>	72	105	100	71	143	-	-	-	<b>140</b>
<b>Break durations (#sec) of Private Channels</b>	150	238	128	85	338	-	105	141	<b>195</b>
<b>Break durations (#sec) of Pay TV(including advertising)</b>	-	153	51	-	-	-	-	-	-

\* weighted average (cf. introduction)

Note that Telepromotions are excluded of these figures and have an average duration of 88 seconds in Italy.

## 2. Isolated advertising and teleshopping spots

(Article 10.2 of the Directive)

Isolated spots are not prohibited in the US and there is no rule mentioning that this type of spot has to remain the exception.

### Impact on commercial practices

Isolated spots are rather exceptional and are not offered as such. If an isolated spot appears in a programme this is rather by coincidence because the block was not sold entirely or because the advertiser was prepared to pay for the entire block.

In the US 12% of advertising interruptions have a duration under 60 seconds. Taking into account the average duration of a spot is 24.6 seconds (tab.5, p28), only a relatively small percentage of blocks contain less than two spots. It is even clearer on the basis of prime time blocks: only 7% of them show an average length of 59 seconds and less.

### Proportion of advertising interruptions under 60 seconds (all day)

TAB 5A	Austria	Belgium N/S	France	Germany	Ireland	Italy	Netherlands	Spain	Sweden	United Kingdom	European Union Countries*
<b>Total</b>	-	27,4%	9,5%	13,5%	-	5,0%	7,5%	33,5%	20,6%	4,0%	12,8%
<b>Public Channels</b>	-	42,1%	9,7%	0,3%	-	7,0%	0,03%	29,6%	0,0%	0,0%	10,3%
<b>Private Channels</b>	-	20,9%	6,4%	13,9%	-	4,5%	8,7%	41,7%	20,6%	4,0%	13,3%
<b>Pay TV (including advertising)</b>	-	42,9%	25,3%	-	-	-	-	2,2%	-	-	-

\* weighted average (cf. introduction)

Note that Telepromotions are excluded of these figures (Italy : 3% in public channels and 9% in privates channels ).

TAB 5B	Czech Republic	Hungary	Poland	Romania	Turkey	Canada E/F	Japan	USA	European Union Countries*
<b>Total</b>	25,2%	19,2%	23,1%	47,4%	12,9%	-	2,0%	12,0%	12,8%
<b>Public Channels</b>	49,9%	22,4%	24,4%	56,2%	27,0%	-	-	-	10,3%
<b>Private Channels</b>	17,6%	7,3%	21,6%	46,0%	11,0%	-	2,0%	12,0%	13,3%
<b>Pay TV (including advertising)</b>	-	28,6%	59,8%	-	-	-	-	-	-

\* weighted average (cf. introduction)

Note that Telepromotions are excluded of these figures (Italy : 3% in public channels and 9% in privates channels ).

### **3. Subliminal advertising**

(Art. 10.3 Directive)

Subliminal advertising techniques are prohibited under US law.

### **4. Surreptitious advertising**

(Art.10.4 Directive)

Product placement in entertainment programming is permitted and is not regulated in the US. However, if the broadcaster receives financial support products/services of value, such as wardrobes, travel allowances, such must be disclosed.

### **Impact on commercial practices**

The use of product placement in TV -programmes is of a recent and growing importance in the US, especially from 2002-2003 ; the two key reasons following the specialists are (1) a reached quantitative saturation of the traditional advertising format (the 30-second commercial), and by this the diminishing qualitative efficiency of its marginal impact, (2) the fact that product placement is permitted by law and clearly attractive for the advertising industry.

Note that the use of product placement (PP) is common since years (from the 80ies) in the film production industry. The volume of PP activity on TV is partly highlighted by a new private monitor, produced by AC Nielsen US and only accessible under subscription (see more details in the economical report, from p41 : “special chapter : product placement”).

A split is to be made between PP during films broadcast and effective TV -programmes broadcast. We notice that concerning TV-programmes (p49), the importance of PP is progressively increasing. It is apparently concentrated on specific programme genres and PP types. We may consider there is a natural limit to the PP presence during the TV programmes as for advertising spots, even in the absence of a quantitative regulation.

We are convinced this saturation level is not reached in the US but the PP mode of operation is well mature. Note that the observed activity via the Nielsen tracking is limited to the key national channels, which is logical in the sense that iDTV's and Pay TV's are less concerned by such advertising formats and based on another business model not requiring such intrusive placements.

There are 3 product placements genres versus the revenue they may generate:

- (1) Accidental / unplanned presence of a product or a brand during a programme ; these occurrences are also registered by the Nielsen tracking because some advertisers are willing to valorise such product presence even if unplanned) ;
- (2) Trade-off of integration or placement in return for a supply of product ;
- (3) Financial compensation for placement or integration: in this case there is a cash payment comparable with the traditional advertising process. But no source does reference this flow as for TV-spots, so that only estimates can be produced.

The difficulty in evaluating the potential advertising revenue generated by PP firstly consists in the estimate of the planned placements share (see p55). On the other hand, there are no standard tariffs rates for PP-action, even though common sense formulas are applied (taking audience volumes into account).

In the economic report, a reliable scale of revenues has been estimated for 2004 and evaluating the proportion at 0.5% to 1% of the total advertising income for the concerned channels. This is a rather important volume considering TV advertising is at its maximum level in the US, and that the PP presence is relatively recent (out of films).

We underline that the PP opportunities are not frequent - the demand is lower than the offer – due to the fact they are limited to certain programmes. Finally, the marginal cost of a PP presence is more expensive “per second” when is it a short and punctual action, but more long-term contracts (annual partnership with series such as Friends or American Idol, e.g.) are less expensive per product mention in comparison with traditional spots.

There are different types of product placement used in the US (*See page 54 for further details on that subject*):

- Currently, the specialists precise that the model of a **free gift** of products/services to a broadcaster/producer **against the obligation to promote** the products/services in the programme is the most frequent way to get a PP.
- Showing of products/services in a programme against payment is less frequent so far, but of a growing share of importance (see our previous comments); in this category defining the product placement as a planned advertising mode, the “prop” is the most used format (30% of cases identified via the Nielsen tracking, see page 49), followed by “background mentions” and “foreground mentions” with respectively 23.8% and 22.2% of the cases.
- The delivery of free TV programmes produced (or subsidized) by an advertiser and obviously promoting its products/services is not frequent in the US, however there are some important exceptions (Disney, Pepsi, Coca-Cola, etc.).
- The accidental occurrences

**Virtual advertising** is rarely used by broadcasters (exceptionally during sports programmes) and is not measured. The technique is not successful, primarily because of the cost.(see tab7, p33-34)

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## II. INSERTION PRINCIPLES (Art. 11 of the Directive)

### Preliminary remarks

Figures in relation to the volume of advertising attributed to a type of programme (Film, Documentary, Series & Soaps, etc ...) include advertising inserted IN and BEFORE this type of programme. The term "insertion" is in conformity with article 11 of the Directive;

### 1. **Insertion of advertising and teleshopping spots between and during the programmes** (Art. 11. Directive)

There is no specific regulation regarding the insertion of advertising and teleshopping spots in and between programmes.

There are also no Network Guidelines agreed by broadcasters and the standards are market driven.

More-over according to US anti trust law such an agreement amongst major broadcasters (limiting time standards, programme interruption standards and quantitative restrictions are prohibited since higher prices would result for TV advertising).

### Impact on commercial practices

The large majority of advertising blocks is placed inside programmes (81%). This corresponds logically to a better advertising impact of such intrusive position versus less aggressive presence of advertising between programmes. We **understand the amount of blocks per hour and the proportion of blocks inside** programmes support advertising efficiency (which are heavily used in the US, being not regulated), which is not the case for the blocks duration, identical with the European benchmarks : see our previous comments.

The average number of blocks is 5,5 per hour during "all day" and 5 per hour during "prime time", which is high compared to the European average. As already mentioned the duration of the breaks is shorter.

The detailed examination of 1 sample week in 2003 (top tv stations) showed an average of 4 breaks per hour of which approximately 3 inside programmes. However this average figure is not always illustrative of the American practice, for example sports programmes can contain up to 33 breaks ! (see tab.4b, p27 )

The average duration between two blocks inside a programme is 10 minutes.

The average duration between two breaks inside a programme, by category (see tab.4a, p20):

Sports:	9 minutes
Entertainment:	9 minutes
Series and Soaps:	10 minutes
News and current affairs:	10 minutes
Documentaries:	-
Children's programmes:	13 minutes
Films and TV films:	15 minutes

Duration between breaks inside a programme is much shorter in the USA than in European countries which have to observe, at least, the rules imposed by article 11.

Entertainment and sports show the shortest period between breaks inside programmes (average of 9 minutes only: tab4a, p20). Nevertheless, the average length between breaks for all programmes is 10 minutes so that we cannot pretend the density of breaks is dramatically high for these two genres.

Children's programmes contain less interruptions than other programmes and the duration between two blocks is somewhat longer. However, this is also the case for Films and TV films which are not regulated in a stricter way than other types of TV programmes (see tab4, p20-27).

Children's programmes represent 8% of total programming (tab11a, p58), on the measured channels but only carry 2,75% of total advertising. Entertainment for example represents 17% of total programming and carries 18,6% of total advertising.

Most advertising revenues are generated from Series & Soaps (22% in total programming and 37% in total advertising), Sports and Entertainment (see tab12, p62-64).

Top 3 of types of programmes broadcast are: Series & Soaps (22%), Entertainment (17%), Information (14%). Note however that advertising represents 17% of total programming (tab11, p58).

**Proportion of interruptions**  
**DURING the programmes/BETWEEN the programmes**

**TAB 6**

<b>COUNTRIES</b>	<b>DURING</b>	<b>BETWEEN</b>
Belgium North	54,4%	45,6%
Belgium South	28,1%	71,9%
Poland	31%*	69,0%
Canada Eng	83,5%	16,5%
Canada Fr	91,5%	8,5%
Japan	77,7%	22,3%
USA	81,0%	19,0%

**Observations** : Only available for these 5 countries

**Average number of interruptions per hour during and between the programmes**

The following average number of blocks per hour is calculated taking into account to the real number of hours broadcast, excepted during Prime Time. (Theoretical - Please, refer to Chapter II of the economical report of the concerned country).

Please, note that the data of table 7 and table 18 are calculated on a different panel of channels. For the net proportion of the advertising broadcast volume, please refer to table 18A.

<b><u>TAB 7A - All Channels</u></b>	Austria	Belgium N/S	France	Germany	Ireland	Italy	Netherlands	Spain	Sweden	United Kingdom	European Union Countries*
Duration of the interruptions All Day (#sec)	246	129	165	199	-	188	185	136	143	236	185
Number of interruptions per hour All Day	1,0	1,4	1,5	1,8	-	1,8	1,6	3,4	1,8	1,8	1,9
Duration of the interruptions Prime Time** (#sec)	-	183	174	212	-	205	225	132	163	261	198
Number of interruptions per hour Prime Time **	-	1,9	2,4	1,4	-	2,1	2,2	3,1	3,1	1,5	2,1

\* weighted average (cf. introduction)

\*\* Theoretical dayparts

<b><u>TAB 7B - All Channels</u></b>	Czech Republic	Hungary	Poland	Romania	Turkey	Canada E/F	Japan	USA	European Union Countries*
Duration of the interruptions All Day (#sec)	132	167	120	83	315	-	105	141	185
Number of interruptions per hour All Day	1,0	1,3	1,8	1,9	1,0	-	5,3	5,5	1,9
Duration of the interruptions Prime Time** (#sec)	162	174	129	98	378	-	125	147	198
Number of interruptions per hour Prime Time **	1,9	1,5	2,4	3,0	1,2	-	6,4	5	2,1

\* weighted average (cf. introduction)

\*\* Theoretical dayparts

<b><u>TAB 7C - Public channels</u></b>	Austria	Belgium N/S	France	Germany	Ireland	Italy	Netherlands	Spain	Sweden	United Kingdom	European Union Countries*
Duration of the interruptions All Day (#sec)	173	90	140	126	-	157	221	129	0	0	140
Number of interruptions per hour All Day	0,5	1,1	1,3	0,3	-	0,9	1,2	3,7	0	0	1,1
Duration of the interruptions Prime Time** (#sec)	-	133	157	0	-	168	278	127	0	0	159
Number of interruptions per hour Prime Time **	-	1,3	2,2	0	-	1,7	1,3	2,7	0	0	2,0

\* weighted average (cf. introduction)

\*\* Theoretical dayparts

<b>TAB 7D - Public channels</b>	Czech Republic	Hungary	Poland	Romania	Turkey	Canada E/F	Japan	USA	European Union Countries*
Duration of the interruptions All Day (#sec)	72	105	100	71	143	-	-	-	140
Number of interruptions per hour All Day	0,4	1,0	1,8	1,9	0,6	-	-	-	1,1
Duration of the interruptions Prime Time** (#sec)	93	101	132	91	193	-	-	-	159
Number of interruptions per hour Prime Time **	1,9	1,2	2,5	2,8	0,9	-	-	-	2,0

\* weighted average (cf. introduction)

\*\* Theoretical dayparts

<b>TAB 7E - Private Channels</b>	Austria	Belgium N/S	France	Germany	Ireland	Italy	Netherlands	Spain	Sweden	United Kingdom	European Union Countries*
Duration of the interruptions All Day (#sec)	257	146	202	201	-	197	180	147	143	236	195
Number of interruptions per hour All Day	1,2	2,0	1,7	2,0	-	2,4	1,7	4,2	2,4	1,9	2,2
Duration of the interruptions Prime Time** (#sec)	-	207	207	212	-	224	218	145	163	261	210
Number of interruptions per hour Prime Time **	-	2,5	3,3	1,6	-	2,5	2,4	4,0	3,9	1,5	2,5

\* weighted average (cf. introduction)

\*\* Theoretical dayparts

<b>TAB 7F - Private Channels</b>	Czech Republic	Hungary	Poland	Romania	Turkey	Canada E/F	Japan	USA	European Union Countries*
Duration of the interruptions All Day (#sec)	150	238	128	85	338	-	105	141	195
Number of interruptions per hour All Day	1,6	1,8	2,0	1,8	1,1	-	5,3	5,5	2,2
Duration of the interruptions Prime Time** (#sec)	215	293	132	99	406	-	125	147	210
Number of interruptions per hour Prime Time **	1,9	1,7	2,6	3,0	1,3	-	6,4	4,7	2,5

\* weighted average (cf. introduction)

\*\* Theoretical dayparts

**Average duration between two interruptions (minutes)****TAB 8**

Belgium N/S	Poland	Canada Eng	Canada FR	Japan	USA
25'	28'	9'47"	12'5"	10'9"	10'

**Observations** : Only available for these 5 countries.

**Duration between interruptions during an audiovisual work (minutes)****TAB 9**

Belgium North	Belgium South	Poland	Canada Eng	Canada FR	Japan	USA
39'	57'	30'	15'	13'	15'	15'

**Observations** : Only available for these 5 countries.

**Proportion of broadcasting volume and advertising investment by type of programmes**

**Children's programmes - All Day 2003**

TAB 10A	Austria	Belgium N/S	France	Germany	Ireland	Italy	Netherlands	Spain	Sweden	United Kingdom	European Union Countries*
Proportion of broadcasting volume vs total broadcasting	10,3%	6,0%	9,3%	4,9%	-	6,8%	14,6%	-	3,0%	7,7%	7,5%
Part in the global advertising investment	-	2,0%	-	-	-	3,3%	3,8%	-	-	8,8%	-

TAB 10B	Czech Republic	Hungary	Poland	Romania	Turkey	Canada E/F	Japan	USA	European Union Countries*
Proportion of broadcasting volume vs total broadcasting	2,1%	9,0%	15,5%	7,0%	5,1%	-	3,2%	7,8%	7,5%
Part in the global advertising investment	0,1%	-	2,3%	0,7%	2,0%	-	-	2,7%	-

**Documentary - All Day 2003**

TAB 11A	Austria	Belgium N/S	France	Germany	Ireland	Italy	Netherlands	Spain	Sweden	United Kingdom	European Union Countries*
Proportion of broadcasting volume vs total broadcasting	0,6%	3,3%	11,6%	11,6%	-	4,6%	2,6%	-	12,8%	15,9%	9,8%
Part in the global advertising investment	-	0,6%	-	-	-	2,9%	1,6%	-	-	18,1%	-

TAB 11B	Czech Republic	Hungary	Poland	Romania	Turkey	Canada E/F	Japan	USA	European Union Countries*
Proportion of broadcasting volume vs total broadcasting	4,9%	1,4%	10,0%	8,7%	3,1%	-	3,6%	3,6%	9,8%
Part in the global advertising investment	0,9%	-	3,1%	1,4%	2,3%	-	-	4,4%	-

**Entertainment and Music - All Day 2003**

TAB 12A	Austria	Belgium N/S	France	Germany	Ireland	Italy	Netherlands	Spain	Sweden	United Kingdom	European Union Countries*
Proportion of broadcasting volume vs total broadcasting	5,5%	11,1%	15,1%	10,8%	-	13,2%	22,5%	-	32,2%	7,5%	12,5%
Part in the global advertising investment	-	14,7%	-	-	-	33,7%	30,3%	-	-	8,5%	-

TAB 12B	Czech Republic	Hungary	Poland	Romania	Turkey	Canada E/F	Japan	USA	European Union Countries*
Proportion of broadcasting volume vs total broadcasting	16,4%	13,3%	12,0%	32,0%	15,0%	-	20,6%	16,9%	12,5%
Part in the global advertising investment	21,8%	-	18,7%	26,9%	16,3%	-	-	18,7%	-

***Film, TV Films and Mini Series - All Day 2003***

TAB 13A	Austria	Belgium N/S	France	Germany	Ireland	Italy	Netherlands	Spain	Sweden	United Kingdom	European Union Countries*
Proportion of broadcasting volume vs total broadcasting	22,2%	17,7%	10,2%	11,9%	-	16,1%	4,3%	-	8,3%	13,0%	12,9%
Part in the global advertising investment	-	28,2%	-	-	-	17,4%	10,6%	-	-	14,9%	-

TAB 13B	Czech Republic	Hungary	Poland	Romania	Turkey	Canada E/F	Japan	USA	European Union Countries*
Proportion of broadcasting volume vs total broadcasting	18,8%	17,9%	17,9%	7,1%	14,0%	-	2,8%	3,7%	12,9%
Part in the global advertising investment	30,7%	-	20,8%	23,3%	14,1%	-	-	3,8%	-

***Information (News, Flash and Info Magazines) - All Day 2003***

TAB 14A	Austria	Belgium N/S	France	Germany	Ireland	Italy	Netherlands	Spain	Sweden	United Kingdom	European Union Countries*
Proportion of broadcasting volume vs total broadcasting	2,6%	12,4%	11,3%	6,8%	-	23,1%	9,4%	-	1,9%	13,4%	12,8%
Part in the global advertising investment	-	11,7%	-	-	-	18,3%	8,7%	-	-	15,2%	-

TAB 14B	Czech Republic	Hungary	Poland	Romania	Turkey	Canada E/F	Japan	USA	European Union Countries*
Proportion of broadcasting volume vs total broadcasting	10,7%	7,6%	5,9%	8,2%	22,3%	-	10,6%	14,4%	12,8%
Part in the global advertising investment	6,1%	-	24,7%	17,7%	13,1%	-	-	8,0%	-

***Political, Religious, Philosophical, Unions programmes - All Day 2003***

TAB 15A	Austria	Belgium N/S	France	Germany	Ireland	Italy	Netherlands	Spain	Sweden	United Kingdom	European Union Countries*
Proportion of broadcasting volume vs total broadcasting	2,0%	1,4%	0,8%	0,5%	-	2,4%	3,2%	-	0,0%	0,0%	1,1%
Part in the global advertising investment	-	0,1%	-	-	-	0,6%	0,7%	-	-	0,1%	-

TAB 15B	Czech Republic	Hungary	Poland	Romania	Turkey	Canada E/F	Japan	USA	European Union Countries*
Proportion of broadcasting volume vs total broadcasting	0,3%	4,7%	2,3%	0,3%	3,6%	-	0,4%	0,0%	1,1%
Part in the global advertising investment	0,0%	-	0,9%	0,1%	2,2%	-	-	0,0%	-

***Series and Soap - All Day 2003***

TAB 16A	Austria	Belgium N/S	France	Germany	Ireland	Italy	Netherlands	Spain	Sweden	United Kingdom	European Union Countries*
Proportion of broadcasting volume vs total broadcasting	9,8%	18,7%	11,6%	11,5%	-	14,1%	8,0%	-	13,9%	5,1%	11,3%
Part in the global advertising investment	-	16,1%	-	-	-	15,4%	22,5%	-	-	5,8%	-

TAB 16B	Czech Republic	Hungary	Poland	Romania	Turkey	Canada E/F	Japan	USA	European Union Countries*
Proportion of broadcasting volume vs total broadcasting	20,6%	5,2%	13,5%	11,8%	11,6%	-	9,4%	22,4%	11,3%
Part in the global advertising investment	26,0%	-	25,9%	15,4%	23,9%	-	-	37,5%	-

***Sports - All Day 2003***

TAB 17A	Austria	Belgium N/S	France	Germany	Ireland	Italy	Netherlands	Spain	Sweden	United Kingdom	European Union Countries*
Proportion of broadcasting volume vs total broadcasting	1,9%	5,1%	3,1%	8,6%	-	3,5%	2,7%	-	8,4%	7,5%	5,6%
Part in the global advertising investment	-	2,3%	-	-	-	5,9%	7,1%	-	-	8,6%	-

TAB 17B	Czech Republic	Hungary	Poland	Romania	Turkey	Canada E/F	Japan	USA	European Union Countries*
Proportion of broadcasting volume vs total broadcasting	4,7%	11,3%	7,9%	3,3%	1,6%	-	5,9%	9,4%	5,6%
Part in the global advertising investment	5,7%	-	2,1%	3,9%	3,3%	-	-	22,5%	-

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### **III. QUANTITATIVE RESTRICTIONS** **(Art. 18 of the Directive)**

#### **1. Quantitative restrictions on advertising and teleshopping spots**

There are no quantitative restrictions in relation to advertising or other commercial information in the US.

The only restrictions concern children's programmes: a maximum of 10.5 minutes of commercial matter per hour during weekends and a maximum of 12 minutes per hour on weekdays.

#### **Impact on commercial practices**

Total minutes of advertising (including teleshopping spots) varies between 8,5 and 11,3 minutes in an hour and between 14 and 18,8% in an average day (see tab10, p38). In prime time these figures are equivalent (see slightly) lower (tab10, p40). In the US the volume of spot advertising seems to remain close to the legal maxima imposed by the Directive.

The volume of advertising during prime time is almost equivalent to all day figures, which is indirectly related to the fact that the advertising pressure out of prime time is high (much more than in European countries). There is an overall cluttering effect in prime time which is at its maximum. Even if there is no legal maximum imposed, broadcasters determine a maximum level taking into account: market standards such as demand, competition with other channels (advertising free pay TV), other media (such as the internet) and the concern not to irritate viewers. Moreover, the TV viewing habits are different: the audience curve in an average day is more flat, showing high audiences also during the day.

Tariffs have not been examined in this study but the economic model of tariffs is linked to the evolution and volume of audiences and the degree of competition between media, and is not necessarily influenced by the absence of regulation.

However, US case law found that agreements between major broadcasters concerning the restriction or control of available advertising space are forbidden because this would result in higher tariffs and is therefore contrary to US anti trust regulation.

One could therefore suppose that tariffs are also in relation with the quantity of available advertising space and that quantitative restrictions have an influence on tariffs in the sense that less available advertising space results in higher tariffs, such on condition demand is higher than available offer. Therefore this reasoning cannot be generalized and is probably only applicable to the major most popular channels and for certain time slots and programme categories.

Concerning the influence of absence of regulatory restrictions on total advertising revenues, we can presume that probably at a first stage the total revenues would grow in a significant way. However, there are several limits which would restrict this effect on the medium and long term.

First of all, above a certain degree of advertising pressure, the irritation of the viewers must be taken into account, because of the risk of audience loss or audience transfer to competitors such as advertising free pay channels (see for example the success of HBO in the US.) Logically, loss of audience results in lower demand from advertisers and in the end in lower tariffs.

On the other hand, the advertising industry is aware of the fact that the impact of a specific commercial (based on memorisation) is related to the advertising volume delivered to the viewer. Therefore the industry observes automatically a certain limit.

Both factors based on the level of advertising tolerance result in a self-regulation trend. It is not certain these maximum limits have been observed in the US: the excessive quantity of advertising on the mainstream channels may have caused a transfer of audiences and traditional advertising revenues to other types of broadcasters such as advertising free pay tv channels, iDTV and also towards other forms of advertising such as product placement.

In conclusion it can be said that the advertising volume in the total broadcasting time on the examined American channels is significantly higher than on European channels: 17,4% advertising, compared to 8% European average.

**Advertising time, Sponsoring time and Self-Promotion time proportions  
vs Total broadcasting time**

TAB18A	Austria	Belgium N/S	France	Germany (2)	Ireland	Italy	Netherlands	Spain (1)	Sweden	United Kingdom	European Union Countries*(2)
<b>Total Advertising time</b> (out of sponsoring and self-promotion)	7,2%	4,5%	6,6%	6,2%	11,5%	9,2%	8,6%	6,8%	9,4%	12,3%	8,0%
<b>Total Sponsoring time</b>	-	0,2%	0,6%	2,1%	-	0,8%	-	0,4%	1,1%	-	1,1%
<b>Self- promotion time</b>	0,1%	3,1%	2,9%	0,1%	-	0,1%	3,5%	-	0,8%	0,0%	1,0%

(1) In some countries, total sponsoring proportion is estimated and could contain house style's logos of advertising breaks.

(2) Germany : the percentage of sponsoring includes infomercials, humanitarian and public interest campaigns (broadcast free of charge or against important discount).

30% of the sponsoring time is equal to the standard definition of the sponsoring (billboards); therefore the estimate of the net volume of sponsorship in Germany would generate an EU average of 0,6%

\* weighted average (cf. introduction)

TAB18B	Czech Republic	Hungary	Poland	Romania	Turkey	Canada E/F	Japan	USA	European Union Countries*(2)
<b>Total Advertising time</b> (out of sponsoring and self-promotion)	3,6%	6,1%	6,0%	4,3%	6,3%	-	11,7%	17,4%	8,0%
<b>Total Sponsoring time</b>	0,2%	-	0,1%	0,4%	0,2%	-	5,0%	3,4%	1,1%
<b>Self- promotion time</b>	0,1%	9,2%	5,8%	5,0%	5,0%	-	0,0%	3,4%	1,0%

## 2. Quantitative restrictions on teleshopping programmes

There are no quantitative restrictions applicable in the US.

### Impact on commercial practices

This category of commercial programme represents very low importance (0,6% of total programming) compared to other programmes and commercial content (advertising represents 17%).(see tab1 1a, p58)

This is related to the existence of specific teleshopping channels but the low importance of teleshopping programmes is also related to the high penetration of e-commerce and shopping facilities on iDTV.

### Proportion of teleshopping programmes vs Total broadcasting

TAB 19 A	Austria	Belgium N/S	France	Germany	Ireland	Italy	Netherlands	Spain	Sweden	United Kingdom	European Union Countries*
% in total broadcasting time	3,9%	5,0%	1,1%	3,5%	-	0,8%	11,6%	1,3%	0,0%	0,0%	1,9%

\* weighted average (cf. introduction)

TAB 19 B	Czech Republic	Hungary	Poland	Romania	Turkey	Canada E/F	Japan	USA	European Union Countries*
% in total broadcasting time	6,2%	3,3%	2,2%	1,1%	1,3%	-	1,6%	0,6%	1,9%

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**IV. SPONSORSHIP**  
**(Art. 17 of the Directive)**

**Article 17.1(a)**

There is no general rule on editorial independence of the broadcaster.

**Article 17.1(b)**

US regulation provides that paid for material must be identified as such and must mention the sponsor. This rule also applies for programmes concerning political or controversial issues if the materials are provided without charge.

A specific rule for alcohol manufacturers applies: their name and location must be disclosed in all its sponsoring.

**Article 17.1(c)**

There is no similar rule under US law.

**Article 17.2**

US regulation prohibits advertising for tobacco products.

**Article 17.3**

Prescription drugs advertising is permitted under certain conditions.

**Article 17.4**

There is no prohibition on the sponsoring of news and current affairs programmes.

### Impact on commercial practices

Compared to other European countries, American channels contain a high percentage of sponsoring, certainly when taking into account the corrected EU average of 7,4%.

Sponsoring message formats (spots, trailers and “billboard” / short spots,) are identical or very similar to the formats used in European countries, whereas this is not regulated in the US and most European countries have detailed regulation on content, duration and insertion of the sponsor identification.

### Proportion of sponsorship broadcasting time and Part of investment relating to sponsorship vs Total advertising and Sponsoring

TAB 20	Austria	Belgium N/S	France	Germany (1)	Ireland	Italy	Netherlands	Spain	Sweden	United Kingdom	European Union Countries* (1)
% of sponsorship broadcasting time	-	3,6%	8,7%	25,2%	-	8,3%	-	3,8%	10,4%	-	12,6%
% of sponsorship investment vs Total	-	6,9%	12,2%	6,9%	-	11,7%	-	5,3%	-	-	9,0%

(1) Germany : in this percentage are also included infomercials and humanitarian and public interest campaigns broadcast free of charge or against important discount.

30% of the sponsoring time is equal to the standard definition of the sponsoring (billboards); therefore the estimate of the net volume of sponsorship in Germany would generate an EU average of 7,3%

\* weighted average (cf. introduction)

TAB 21	Czech Republic	Hungary	Poland	Romania	Turkey	Canada E/F	Japan	USA	European Union Countries*(1)
% of sponsorship broadcasting time	5,2%	-	1,4%	9,2%	3,0%	-	29,9%	16,0%	12,6%
% of sponsorship investment vs Total	1,9%	-	3,6%	3,8%	1,4%	-	7,6%	17,3%	9,0%

\* weighted average (cf. introduction)

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## **VI. NEW ADVERTISING TECHNIQUES**

There is no specific regulation on split screen advertising, interactive advertising and virtual advertising.

The general rules included in European TV advertising regulation which are often referred to, to prohibit the use of these new techniques do not exist either in the US (separation programme/advertising; rules on insertion during programmes; surreptitious advertising ...)

However, even if no specific TV advertising regulation exists, the use of techniques such as split screen or virtual advertising can only be done with the consent of the right holders of the programmes.

### **Impact on commercial practices**

It seems that these new techniques are rarely used and not successful in the US (see tab 7, p33-34).

<b>TAB 22A</b>	<b>Austria</b>	<b>Belgium N/S</b>	<b>France</b>	<b>Germany</b>	<b>Ireland</b>	<b>Italy</b>	<b>Netherlands</b>	<b>Spain</b>	<b>Sweden</b>	<b>UK</b>
<b>Used or not</b>	Y	N	N	Y	N	N	Y	Y	Y	Y
<b>Measured</b>	N	-	-	Y	-	-	N	*	N	N

*\* Measured as Advertising Spots*

<b>TAB 22B</b>	<b>Czech Rep.</b>	<b>Hungary</b>	<b>Poland</b>	<b>Romania</b>	<b>Turkey</b>	<b>Canada E/F</b>	<b>Japan</b>	<b>USA</b>
<b>Used or not</b>	Y	Y	N	N	Y	Y	N	N
<b>Measured</b>	*	N	-	-	Y	N	-	-

*\* Measured as Advertising Spots*

\*

\* \*

## **VI. GENERAL PRINCIPLES ON ADVERTISING AND TELESHOPPING CONTENT**

(Article 12 of the Directive)

There is generally little or no regulation on the content of advertising. In the US this subject is self-regulated by networks and individual stations. There are however rules prohibiting misleading advertising.

### **Impact on commercial practices**

It is not possible to measure the concrete economic impact of regulation or self-regulation in relation to the content of advertising. Nevertheless it can be presumed the economic impact of such self-regulation is positive and encourages consumer confidence in advertising.

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## **VII. SPECIFIC PRODUCTS AND TARGETS** **(Articles 13, 14, 15 and 16 of the Directive)**

### **Tobacco** (Article 13 Directive)

Federal law prohibits advertising for cigarettes and most other tobacco products (however: tobacco companies may still air advertising promoting the company itself or products unrelated to tobacco).

According to the Network Guidelines, advertising for cigars, pipe tobacco etc ...varies among the networks.

No Questions: revenues out of this category seems to be inexistent (no tobacco products advertised on tv).(see tab 13b, p73)

### **Medicines** (Article 14 Directive)

Non prescription medicines can be advertised and even prescription medicines can be advertised under certain conditions.

### **Alcohol** (Article 15 Directive)

There is no regulation on beer or wine advertising but both categories are self-regulated (encouraging responsible drinking and avoiding to target minors); equally there is no specific regulation for distilled alcoholic beverages but there is self-regulation which includes a self-imposed ban on TV advertising.

Advertising directed at **minors** is regulated on many levels and is more restrictive than the Directive TV Without Frontiers. CARU drafted a self-regulatory program and provides guidelines for advertisers and advertising agencies

Network guidelines contain special rules in relation to advertising directed at children age 12 and under.

Regulation on TV advertising contains a quantitative restriction in relation to children's programmes for an audience under 12 years old (maximum 10.5 minutes per hour during weekends and 12 minutes per hour on weekdays). Also a 5 second gap must be observed between programme and advertising.

### **Impact on commercial practices**

Non prescription medicines is an important category (almost same level as Cosmetics and personal hygiene on third place; 1. Children's products, 2. Food). It seems that prescription drug advertising is excluded from the figures so in reality medicines represent an even more important category.(see tab13c and 13d, p.74-75)

Alcohol advertising seems to be of little importance. TV advertising for alcohol is of rather low importance. Beer is advertised but spirits for example are not advertised on TV (see tab13c, p74).

In comparison to other programmes children's programmes seem less interrupted and less frequent interrupted.(see tab 4 , p 20-27 )

Children's programmes clearly attract less advertising revenues than other types of programmes such as Entertainment or Series and Soaps.(see tab12d, p62)

Since products dedicated to children are the most important category (together with food: see tab13a and 13b, p 72-73)), It seems that products dedicated to children are advertised to a large extent around and in other types of programmes such as Series & soaps and Entertainment. Probably because these types of programmes attract an important minor audience when scheduled at certain hours. The economical impact of legal advertising restrictions in relation to children's programmes has to be toned down because it seems possible to reach an important children's audience through certain programme types which are not qualified in legal terms as "children's programmes".

It has to be reminded that the figures in the economic report do not include some important advertisers, such as telecom, cars and financial services.

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## VIII. GENERAL OBSERVATIONS

TV is by far the most popular medium for advertising (67,3% of total gross media investments) but is seems that regulation, or in the case of the USA rather the absence of regulation, is only one of more factors likely to influence the Tv advertising volume and revenues.

Advertisers trying to reach a large audience choose the most popular mass media. In the US it seems that TV is still the most ideal medium to reach a large part of the target group. On this moment TV seems to be still in a good competition position towards other media such as print media, radio or the Internet.

<b>TAB 24A</b>	Austria	Belgium N/S	France	Germany	Ireland	Italy	Netherlands	Spain	Sweden	United Kingdom	European Union Countries
Total Media Investments (000 €)	2.160.947	2.137.479	15.900.000	17.157.223	537.000	25.600.000	4.044.066	12.079.033	1.611.067	11.986.590	106.902.530
Total TV Invest. (000 €)	463.085	945.281	6.070.563	7.443.792	207.716	9.140.000	2.066.192	6.773.889	382.283	5.237.400	37.370.852
Average part of TV Invest.*	21,4%	44,2%	38,2%	43,4%	38,7%	35,7%	51,1%	56,1%	23,7%	43,7%	35,0%
Average part of Top 5 TV vs Total TV Invest.*	85,8%	94,7% N 97,0% S	91,9%	78,8%	98,9%	74,4%	70,1%	82,6%	100,0%	81,3%	84,4%
Average Top 5 Audience Share*	62,4%	65,6% N 43,4% S	85,3%	40,2%	56,7%	79,4%	52,1%	79,5%	46,4%	35,2%	60,5%
Adults population universes	6.505.800	8.256.000	45.660.000	63.036.553	3.010.000	49.540.000	13.308.000	34.588.000	7.235.000	46.663.000	277.802.353
GDP (mo €)	226.142	267.480	1.557.245	2.128.200	134.786	1.300.926	454.276	743.046	267.297	1.589.468	8.668.867
Average Total Media Invest. / GDP*	0,96%	0,80%	1,02%	0,81%	0,40%	1,97%	0,89%	1,63%	0,60%	0,75%	1,23%
Average Total TV Invest. / GDP*	0,20%	0,35%	0,39%	0,35%	0,15%	0,70%	0,45%	0,91%	0,14%	0,33%	0,43%
Average Adv. Invest. / inhab.	332,2	258,9	348,2	272,2	178,4	516,8	303,9	349,2	222,7	256,5	384,8
Average TV Adv. Invest. / inhab.* (€ per year)	71,2	114,5	133,0	118,1	69,0	184,5	155,3	195,8	52,8	114,7	134,5

<b>TAB 24B</b>	Czech Republic	Hungary	Poland	Romania	Turkey	Canada E/F	Japan	USA	Applicant countries	Countries Outside EU	All countries Observed
Total Media Investments (000 €)	1.056.282	1.460.785	2.416.794	1.358.000	8.666.904	4.273.026	42.573.909	107.030.038	14.958.765	153.876.973	275.738.288
Total TV Invest. (000 €)	508.937	956.867	1.437.035	1.143.817	6.472.230	1.783.930	14.590.520	72.045.904	10.518.887	88.420.354	136.310.092
Average part of TV Invest.*	48,2%	65,5%	59,5%	84,2%	74,7%	41,7%	34,3%	67,3%	70,3%	57,5%	49,4%
Average part of Top 5 TV vs Total TV Invest.*	99,8%	100,0%	94,6%	92,8%	73,9%	79,0%	56,8%	25,3%	82,5%	31,6%	50,0%
Average Top 5 Audience Share*	93,6%	80,5%	79,5%	69,7%	59,2%	40,8% English	77,5%	41,4%	72,1%	50,8%	57,7%
Adults population universes	8.453.632	7.799.734	30.514.000	16.222.000	33.848.233	24.268.903	84.801.171	211.400.000	96.837.599	320.470.074	695.110.026
GDP (mo €)	80.097	73.213	185.176	50.352	212.268	768.969	3.800.189	9.727.723	601.106	14.296.881	23.566.853
Average Total Media Invest. / GDP*	1,32%	2,00%	1,31%	2,70%	4,08%	0,56%	1,12%	1,10%	2,49%	1,08%	1,17%
Average Total TV Invest. / GDP*	0,64%	1,31%	0,78%	2,27%	3,05%	0,23%	0,38%	0,74%	1,75%	0,62%	0,58%
Average Adv. Invest. / inhab.	125,0	187,3	79,2	83,7	256,1	176,1	502,0	506,3	154,5	480,2	396,7
Average TV Adv. Invest. / inhab.* (€ per year)	60,2	122,7	47,1	70,5	191,2	73,5	172,1	340,8	108,6	275,9	196,1

\* weighted average (cf. introduction)

\* \*  
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Brussels, June 2005.