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COMMISSION OF THE EUROPEAN COMMUNITIES

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COMMISSION STAFF WORKING DOCUMENT

Annex to the

Proposal for a

**DIRECTIVE OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL
AMENDING COUNCIL DIRECTIVE 89/552/EEC**

**on the coordination of certain provisions laid down by law, regulation or administrative
action in Member States concerning the pursuit of television broadcasting activities**

Impact Assessment – Draft Audiovisual Media Services Directive

STATISTICAL ANNEX

{COM(2005) 646 final}

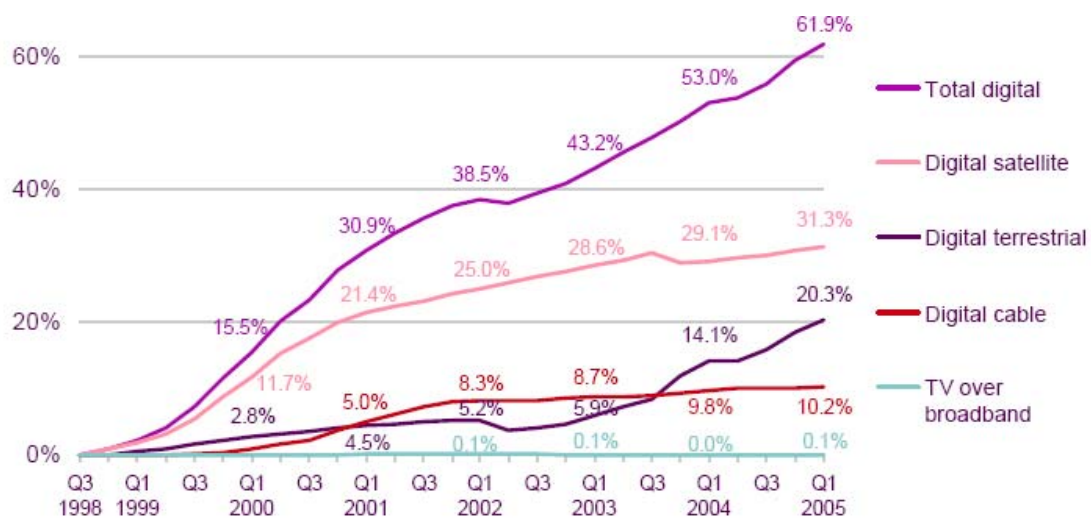
COMMISSION SERVICES WORKING PAPER

Impact Assessment – Draft Audiovisual Media Services Directive

STATISTICAL ANNEX

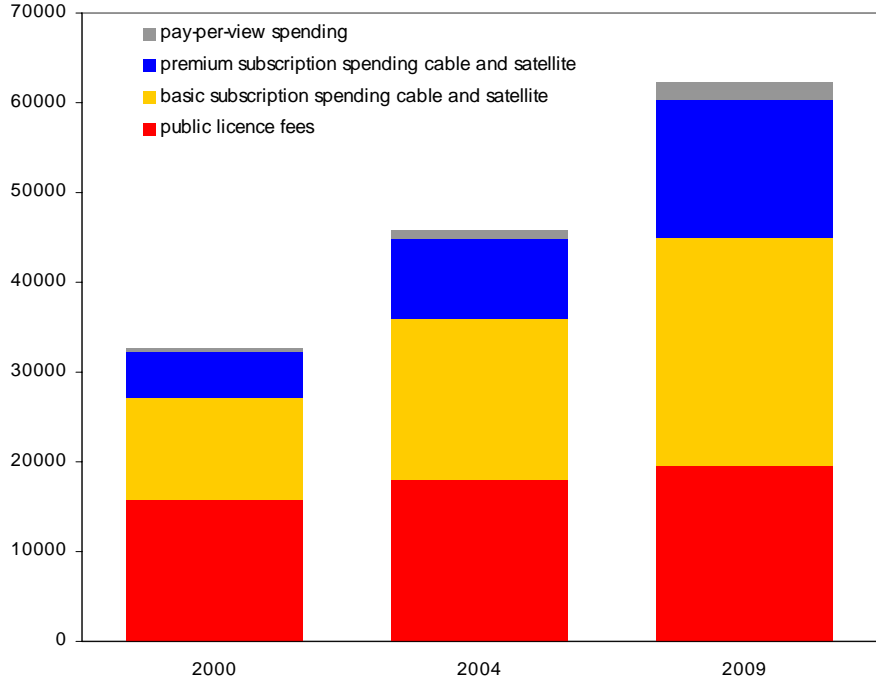
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FIGURE 1: UK DIGITAL TELEVISION PENETRATION BY HOUSEHOLD



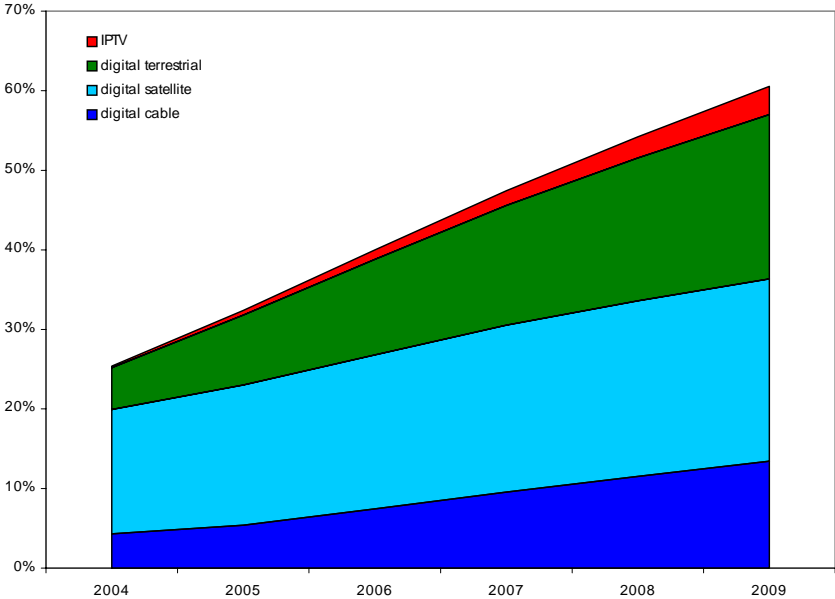
Source: Ofcom Digital Television Update

FIGURE 2: DEVELOPMENT OF TV REVENUES BY SOME CATEGORIES IN THE EU-15, 2000-2009 (US\$MILLION)



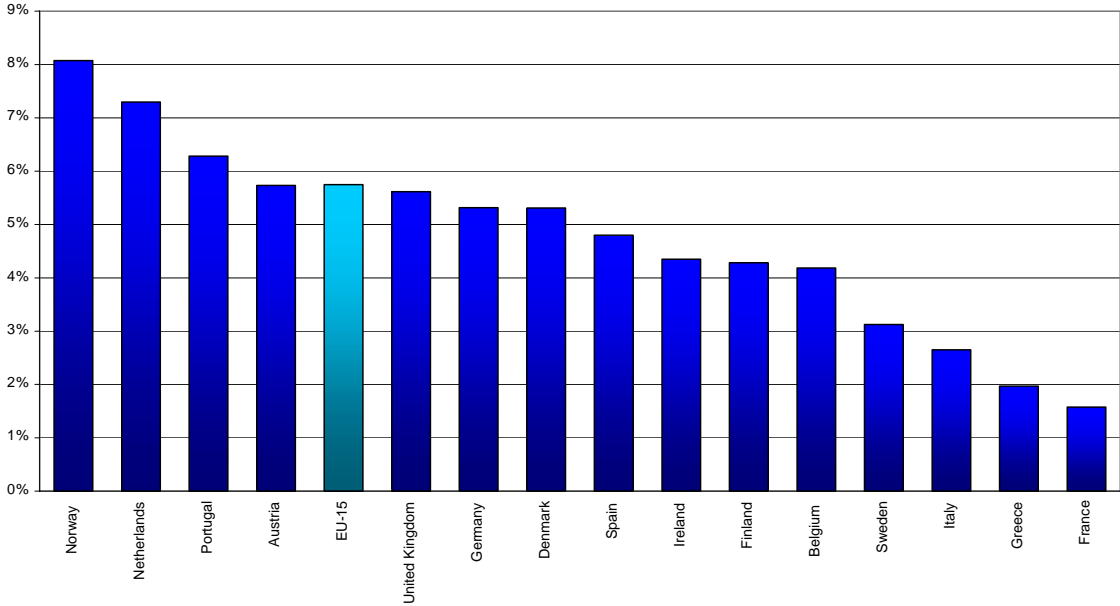
Source: PwC, Global entertainment and media outlook 2005-2009.

FIGURE 3: PENETRATION OF DIGITAL TELEVISION IN EUROPE, 2004-2009 (% OF TOTAL TV HOUSEHOLDS)



Source: Datamonitor.

FIGURE 4: COMPOUND AVERAGE GROWTH RATE OF TV SUBSCRIPTION SPENDING PER HOUSEHOLD IN THE EU-15, 2004-2009 (%)

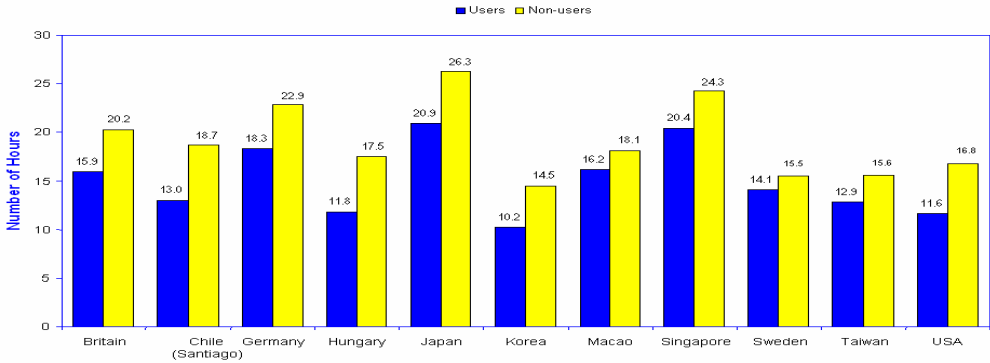


Source: PwC, Global entertainment and media outlook 2005-2009.

FIGURE 5: TV VIEWING BETWEEN BROADBAND USERS AND OTHERS 2003 IN 11 COUNTRIES

 **The World Internet Project**

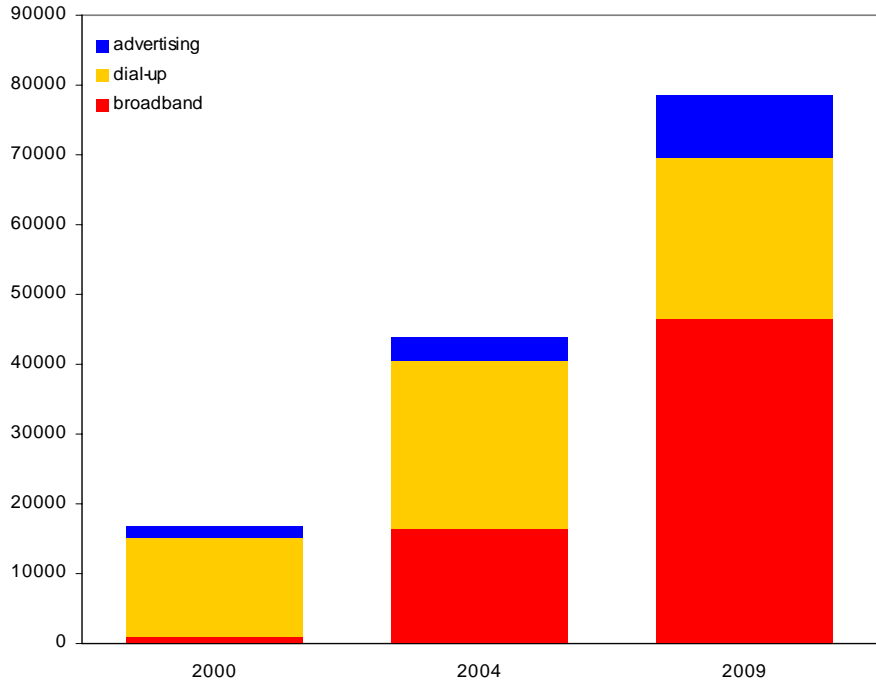
**Average Hours per Week Spent Watching Television:
Users vs. Non-Users**



HTV x Usenet - 7 extra questions (10-22-03)

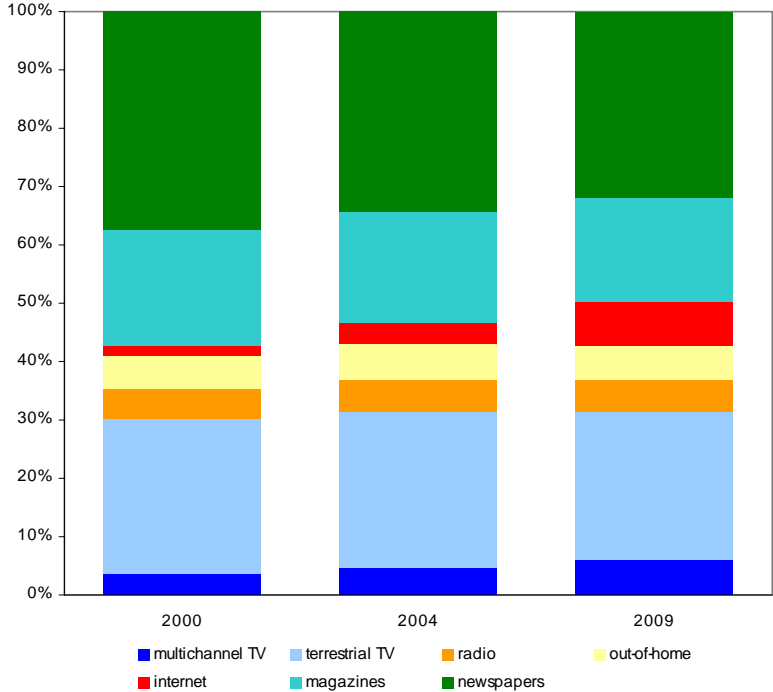
UCLA Center for Communication Policy

FIGURE 6: DEVELOPMENT OF INTERNET ACCESS TURNOVER BY CATEGORY IN THE EU-15, 2000-2009 (US\$MILLIONS)



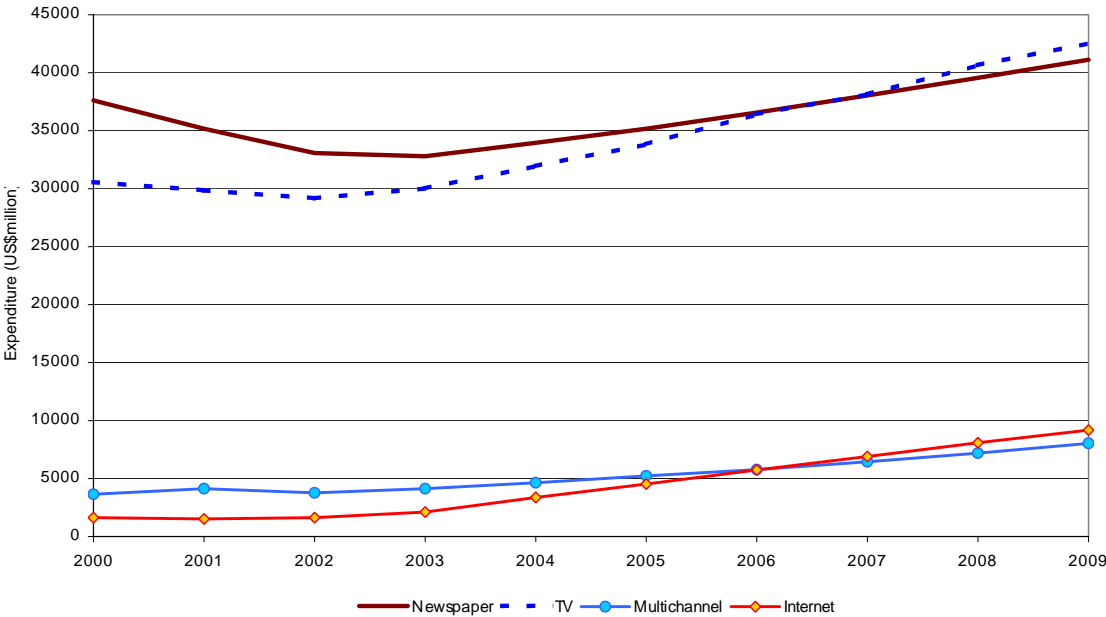
Source: PwC, Global entertainment and media outlook 2005-2009.

FIGURE 7: ADVERTISING REVENUES IN THE EU-15 BY SEGMENT OF THE ENTERTAINMENT AND MEDIA MARKET, 2000-2009



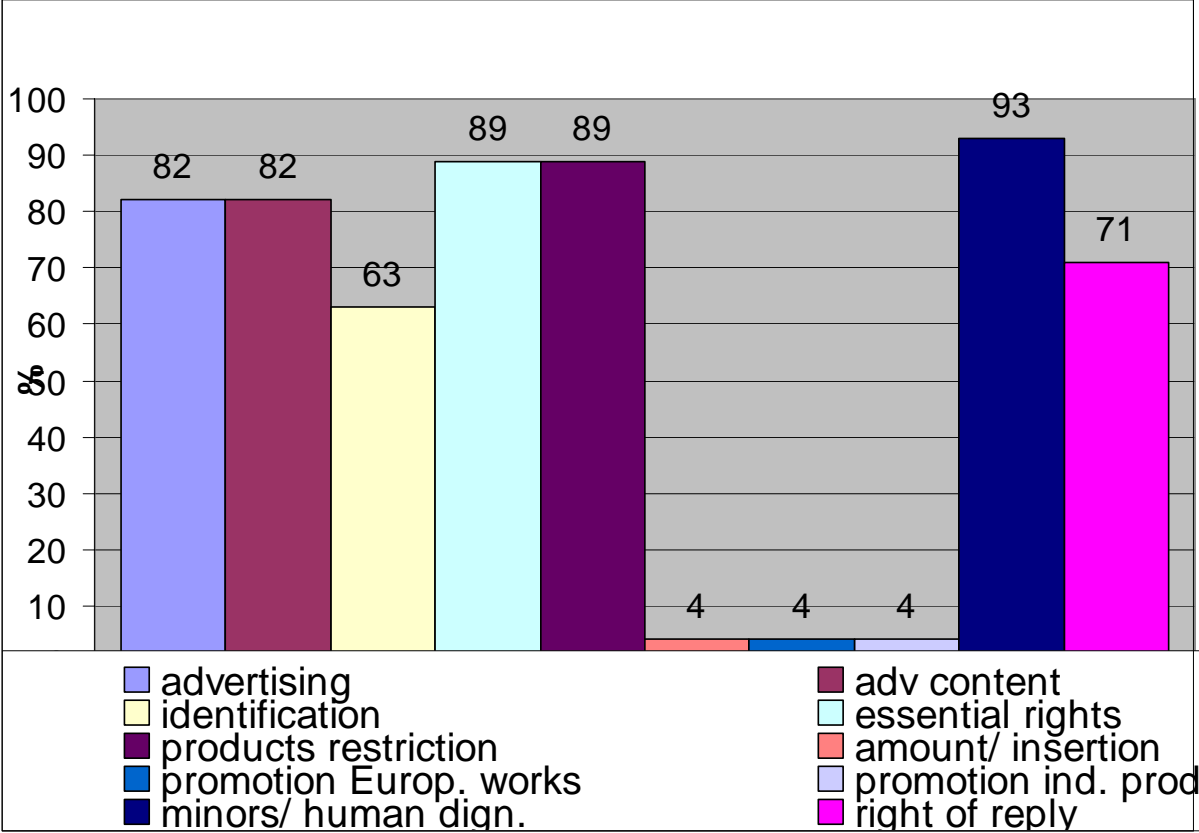
Source: PwC, Global entertainment and media outlook 2005-2009.

FIGURE 8: EUROPEAN ADVERTISING EXPENDITURE IN NEWSPAPERS, TELEVISION AND THE INTERNET, 2000-2009 (US\$ MILLION)



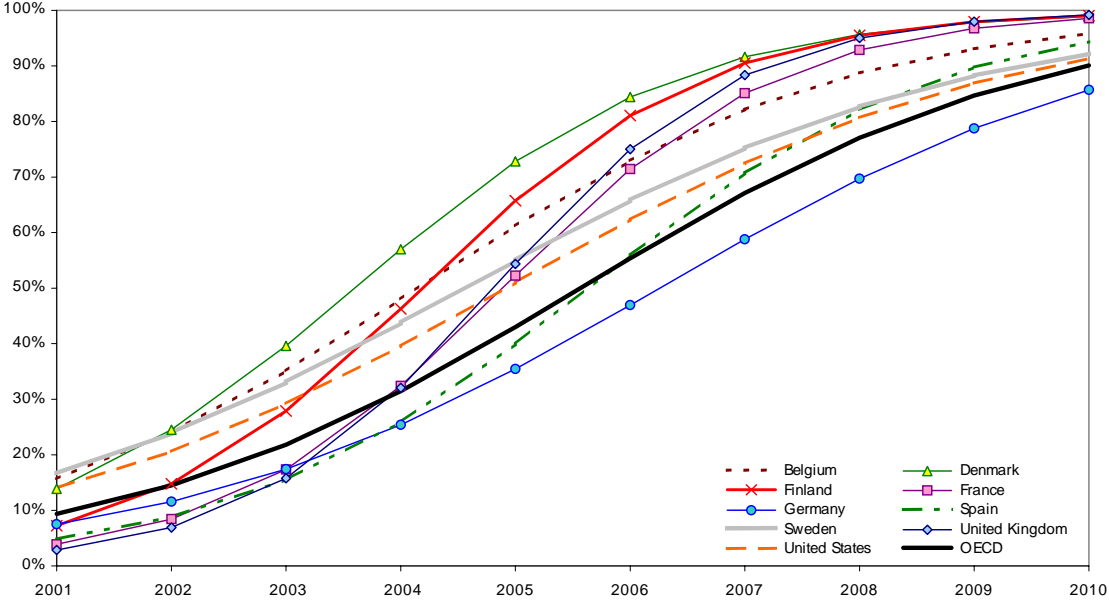
Source: Rand Europe

FIGURE 9: REGULATION OF NON-LINEAR SERVIVES (GENERAL OR SPECIFIC) IN % ANSWERS



Source: Commission services survey to the members of the ‘Television without Frontiers’ Directive’s Contact Committee

FIGURE 10 GROWTH OF BROADBAND PENETRATION TOWARDS SATURATION



Source: RAND Europe Projections based on 2005 OECD dataset.

FIGURE 11: SHARES IN TOTAL ADVERTISING

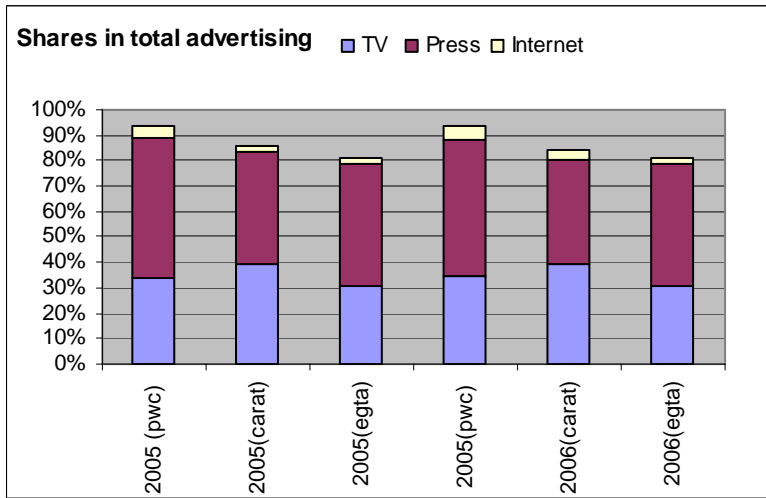
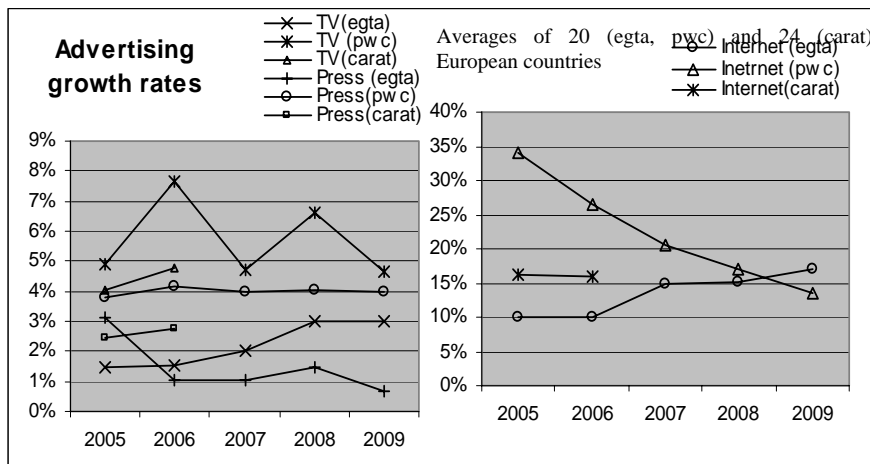


FIGURE 12: ADVERTISING GROWTH RATES



Carat: Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Netherlands, Norway, Portugal, Spain, Sweden, Switzerland, UK, Estonia, Hungary; Latvia, Lithuania, Romania, Slovak Rep, Czech Rep, Poland

PWC: Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Netherlands, Norway, Portugal, Spain, Sweden, Switzerland, UK, Hungary; Romania, Czech Rep, Poland

Egta: 20 European countries

FIGURE 13 US ADVERTISING TURNOVER FOR PRODUCT PLACEMENT

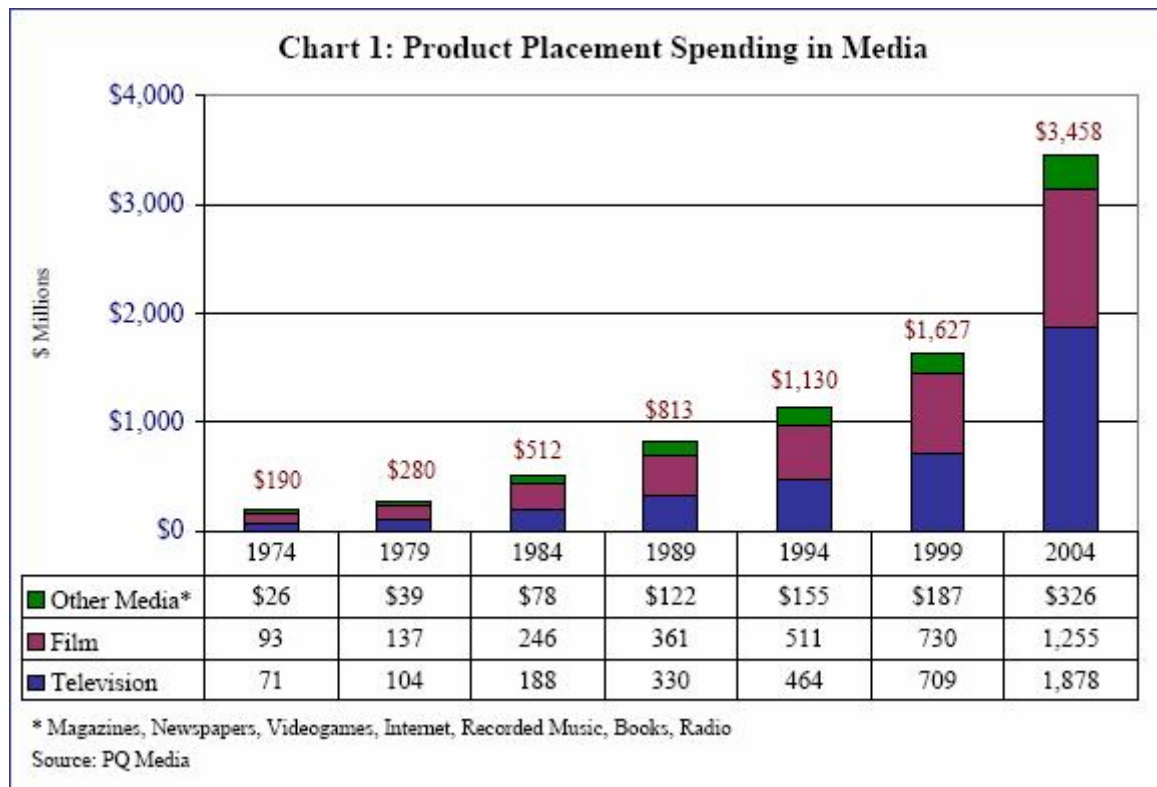


TABLE 1: DEVELOPMENT OF VOD/SVOD IN EUROPE, 2001-2009

	VOD/SVOD households (US\$ millions)	Annual spending household (US\$)	Aggregate per annual spending (US\$ million)
2001	0.3	20	6
2002	0.6	30	18
2003	2.0	40	80
2004	3.3	50	165
2005	6.4	60	384
2006	10.0	65	650
2007	13.9	70	973
2008	18.0	75	1350
2009	22.3	75	1673

Source: PwC, Global entertainment and media outlook 2005-2009.

TABLE 2: SHARE OF MULTICHANNEL ADVERTISING IN TOTAL TELEVISION ADVERTISING, 2000-2009 (%)

	2000	2004	2009
Austria	10%	19%	27%
Belgium	88%	87%	88%
Denmark	26%	34%	43%
Finland	2%	4%	11%
France	4%	5%	7%
Germany	6%	8%	10%
Greece	0%	1%	1%
Ireland	5%	11%	16%
Italy	1%	3%	10%
Netherlands	78%	76%	78%
Norway	34%	36%	40%
Portugal	5%	7%	11%
Spain	2%	7%	11%
Sweden	41%	46%	51%
United Kingdom	17%	20%	28%
EU-15	12%	15%	19%
Czech Republic	1%	2%	6%
Hungary	15%	17%	20%
Poland	4%	6%	9%
Romania	0%	3%	6%

Source: PwC, Global entertainment and media outlook 2005-2009.

TABLE 3: DEVELOPMENT OF THE SPORTS TV RIGHTS MARKET, 2000-2009 (US\$MILLION)

2000	5,008
2001	5,475
2002	6,346
2003	5,609
2004	5,714
2005	6,335
2006	7,328
2007	6,831
2008	7,577
2009	7,452

TABLE 4: FREE DTH HOUSEHOLDS AS A PERCENTAGE OF TOTAL TV HOUSEHOLDS 2004 (%)

Austria	46.7
Belgium	6.2
Denmark	13.4
Finland	7.2
France	5.1
Germany	26.2
Greece	6.5
Ireland	5.5
Italy	5.3
Luxembourg	19.3
Netherlands	5.4
Norway	0.2
Portugal	0.7
Spain	2.9
Sweden	12.2
Switzerland	23.4
UK	1.2

Source: Screen Digest (November 2004)

TABLE 5: COMPOUND AVERAGE ANNUAL GROWTH RATES OF ADVERTISING REVENUES IN EUROPE, 2005-2009 (%)

Television	6.4
Internet	22.2
Magazines	4.6
Newspapers	4.2
Radio	5.6
Out-of-home	5.6

Source: PwC, Global entertainment and media outlook 2005-2009.

TABLE 6: TV AUDIENCE MARKET SHARE OF FOREIGN CHANNELS IN % (2004)

Country	Foreign public channels	Foreign channels targeting the	Other foreign channels (est.)	Total foreign channels (est.)
AT	10.5	6.3	16.5	33.3
BE (CFR)	14.5	~	32.3	46.8
BE	5.3	~	13.9	19.2
CY	3.7	~	49.6	53.3
CZ	~	~	ca 6	ca 6
DE	~	0.9	~	0.9
DK	1.4	15.4	5.1	21.9
EE	15.6	~	~	15.6
ES	~	~	ca 2	ca 2
FI	~	~	ca 5	ca 5
FR	~	~	ca 1	ca 1
GB	~	~	0.2	0.2
GR	~	~	~	0.0
HU	~	0.6	2.7	3.3
IE	16.0	~	29.2	45.2
IT	~	~	ca 1	ca 1
LT	3.6	~	15.7	19.3
LU	25.6	~	60.0	85.6
LV	9.6	~	24.5	34.1
NL	4.6	29.9	ca 10	ca 40
PL	~	5.1	11.3	16.4
PT	~	~	~	~
SE	0.7	25.2	2.5	28.4
SI	~	~	25.9	25.9
SK	~	~	26.9	26.9

Source: OBS

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