

# One Television Year in the World

*From analogue to digital*



## Worldwide TV unaffected by the crisis!

Jacques Braun,  
Eurodata TV Worldwide Vice President

18 mars 2010

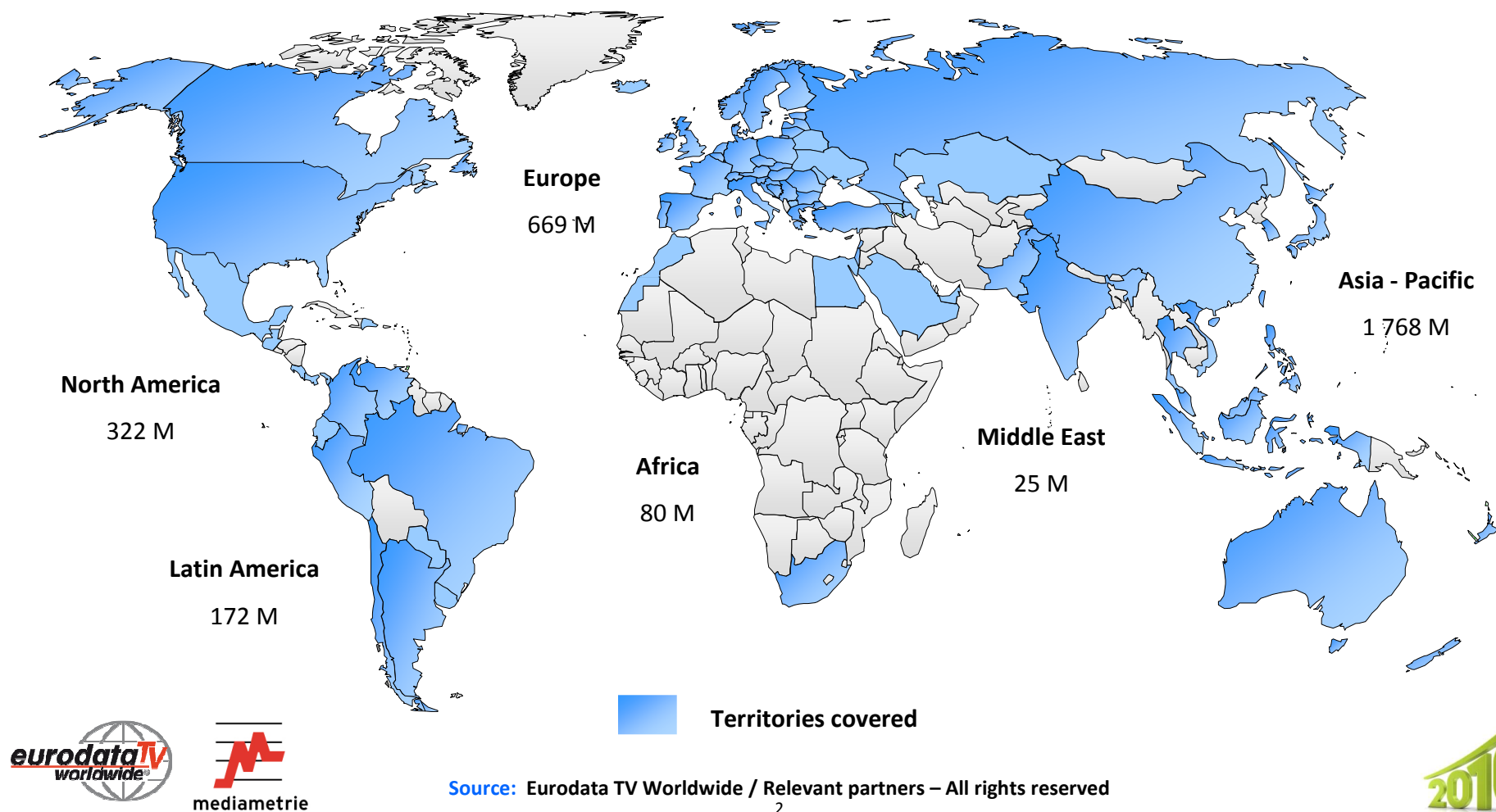
Program, channel and TV consumption analysis in 89 territories  
over 5 continents

Source: Eurodata TV Worldwide / Relevant partners – All rights reserved



# 3 Billion potential viewers

More than 2,000 channels



# A record of 89 territories !

## The new « entrances »

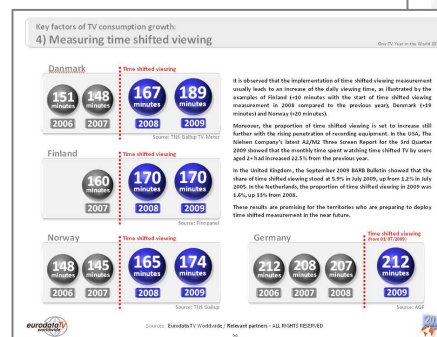
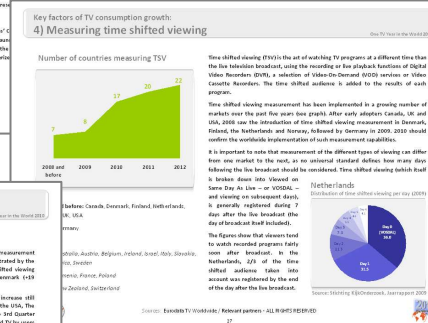
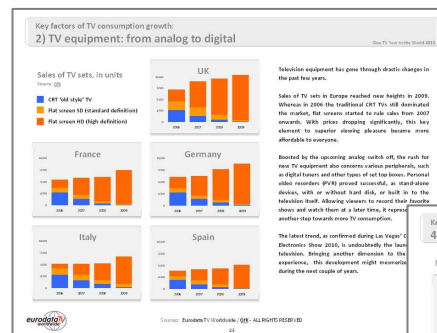


NEW

+ 33 million potential viewers  
In the Middle East

## New indicators :

- TV equipment
- Switch-off Barometer
- Time shifted viewing impact

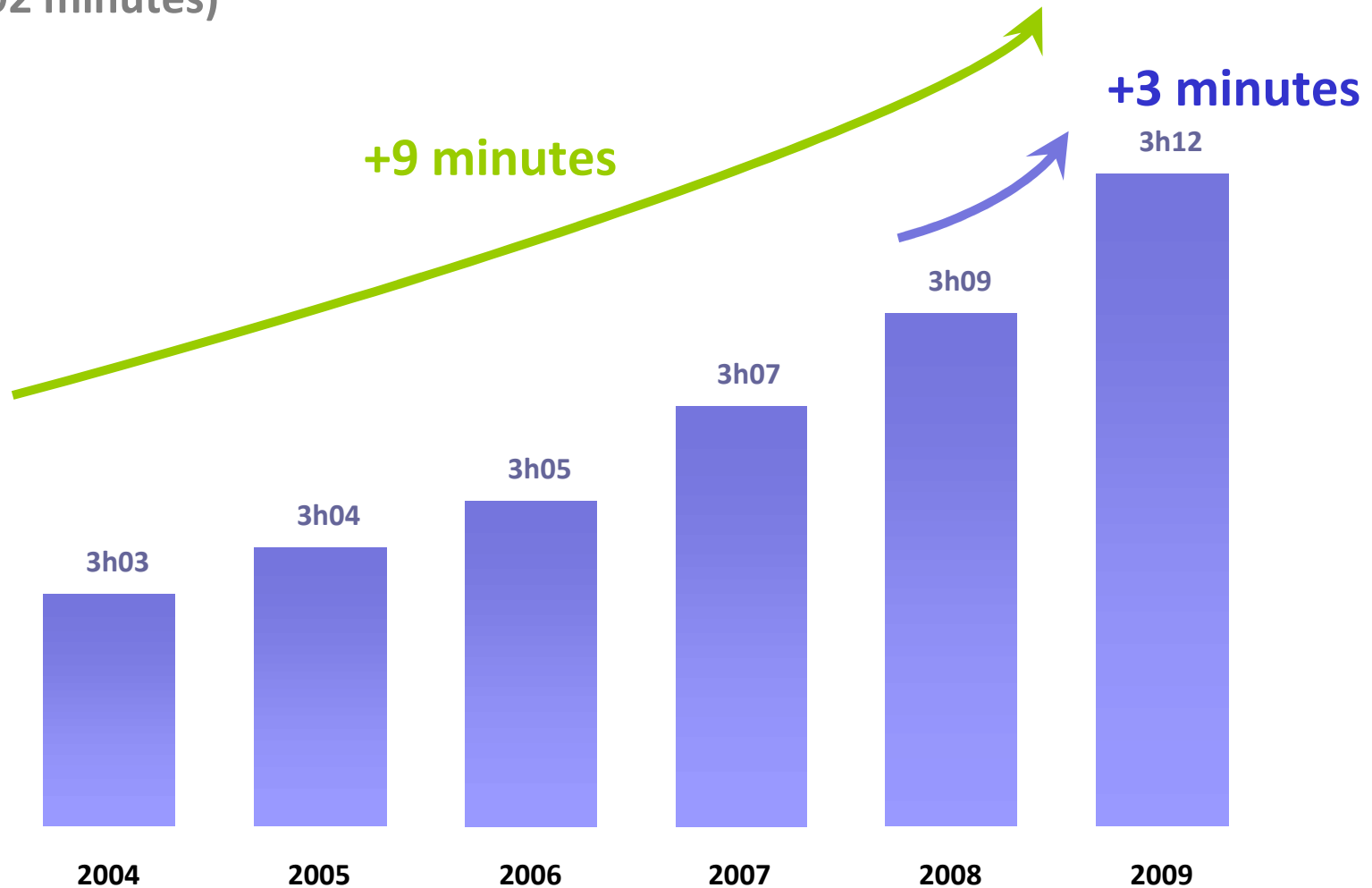


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# A record worldwide daily viewing time: 3h12

(192 minutes)



Average daily viewing time per individual, in hours, for target total individuals.  
Weighted averages based on the size of the total individual universes (76 territories in 2008).

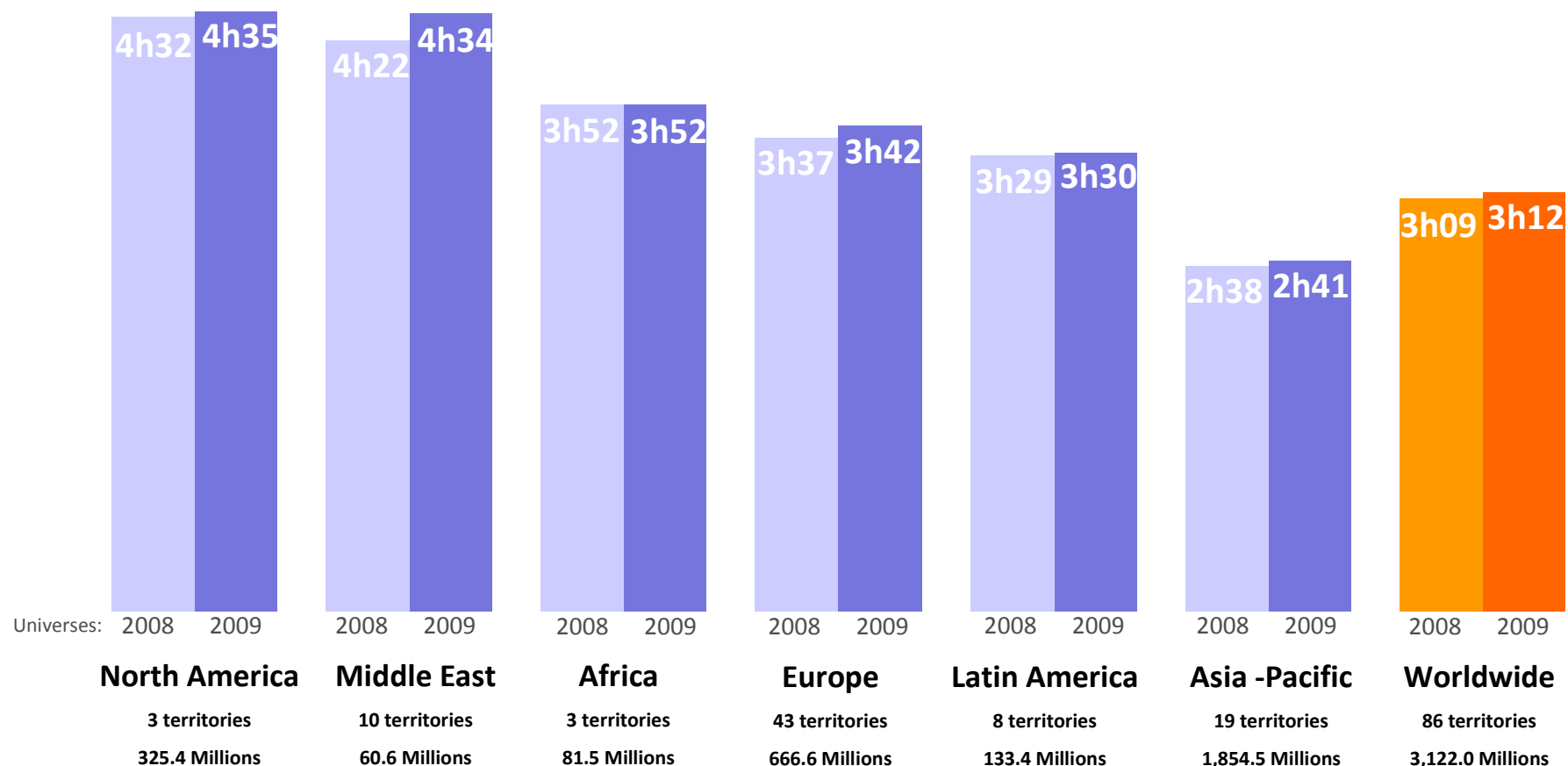


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# North America, leader since 1994

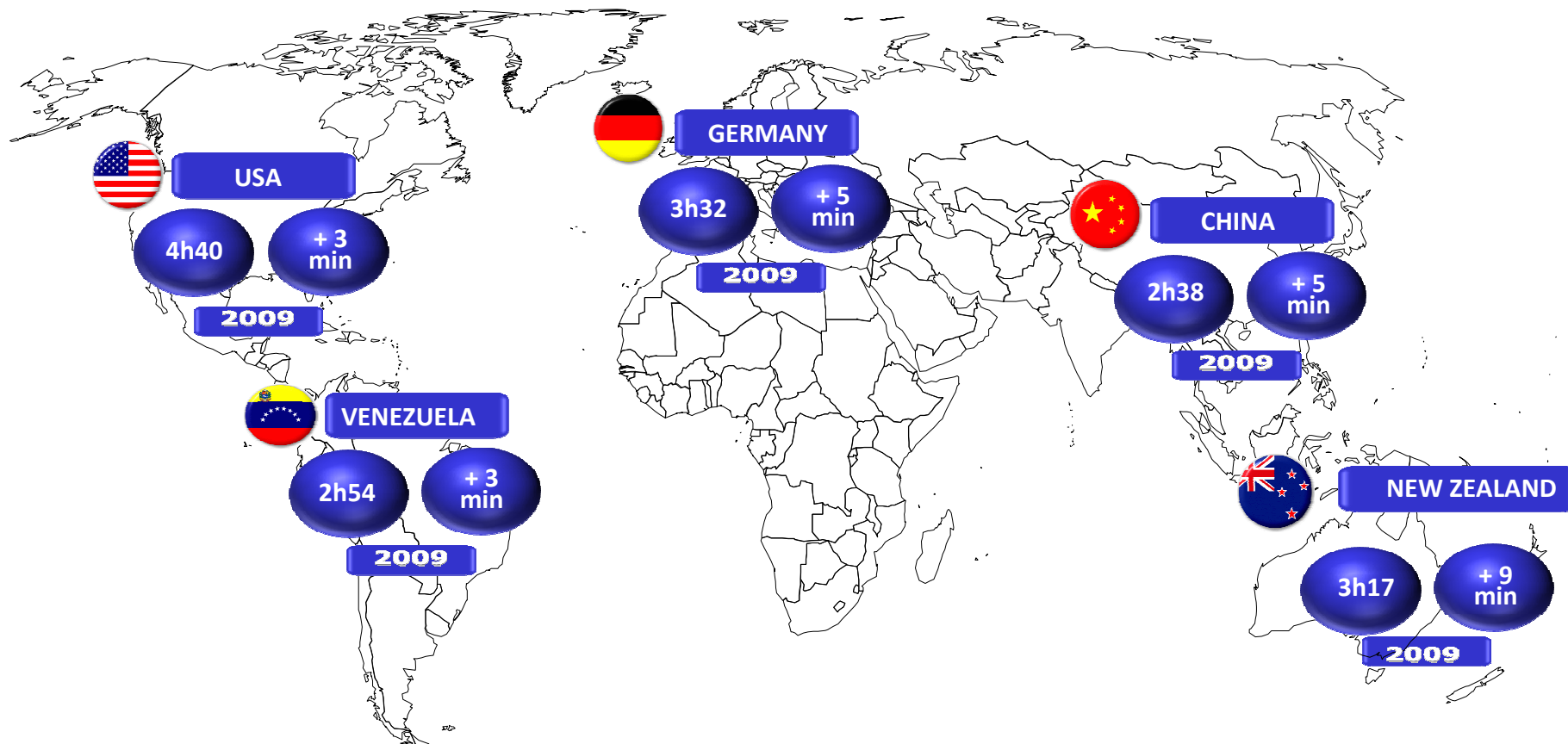
Average daily viewing time per individuals, in hours



Source: Eurodata TV Worldwide / Relevant partners – All rights reserved



# No crisis for TV consumption !



Average daily viewing time per individual, in hours, for target total individuals.  
Weighted averages based on the size of the total individual universes.

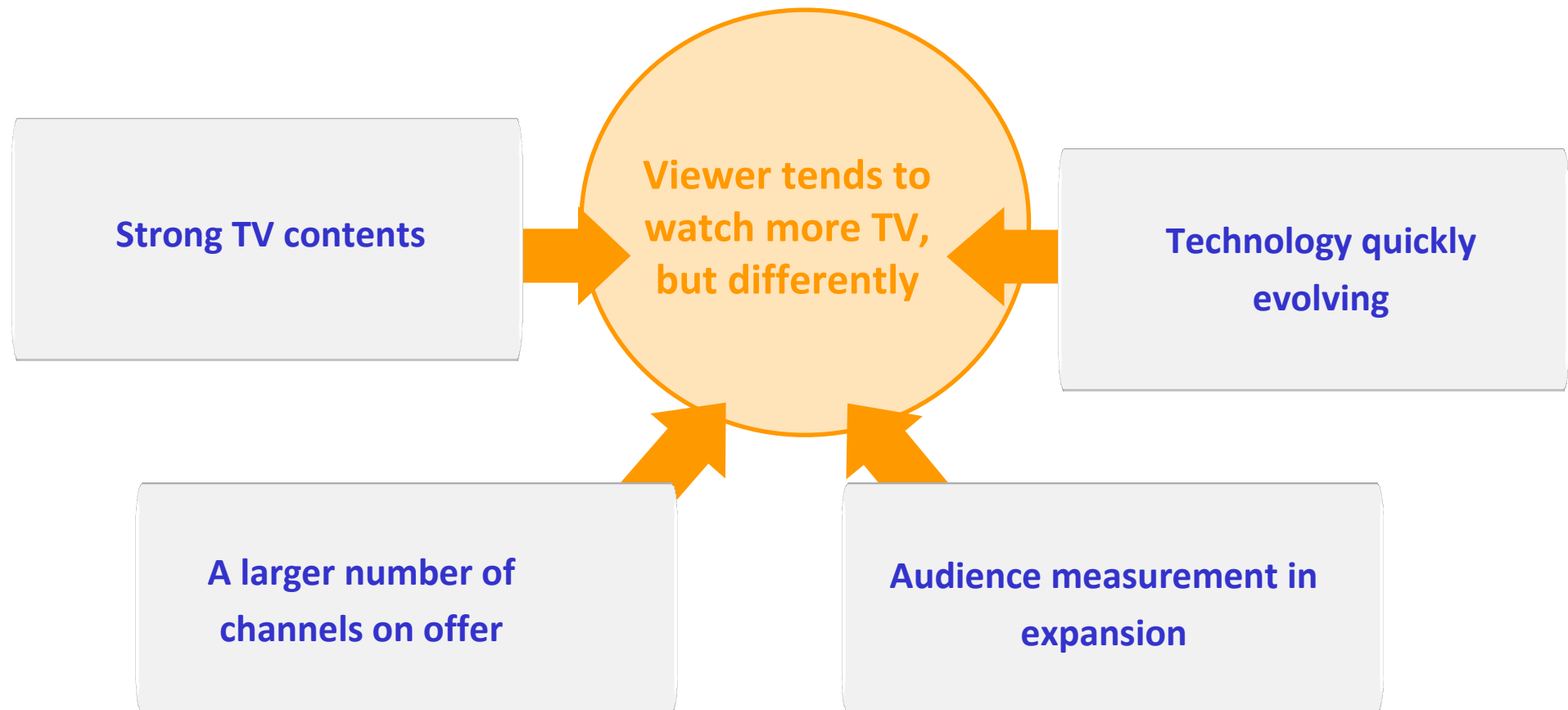


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# Technologies and contents...

## ...drivers of rising TV consumption



# From analogue to digital : nearly 40 countries up to 2015

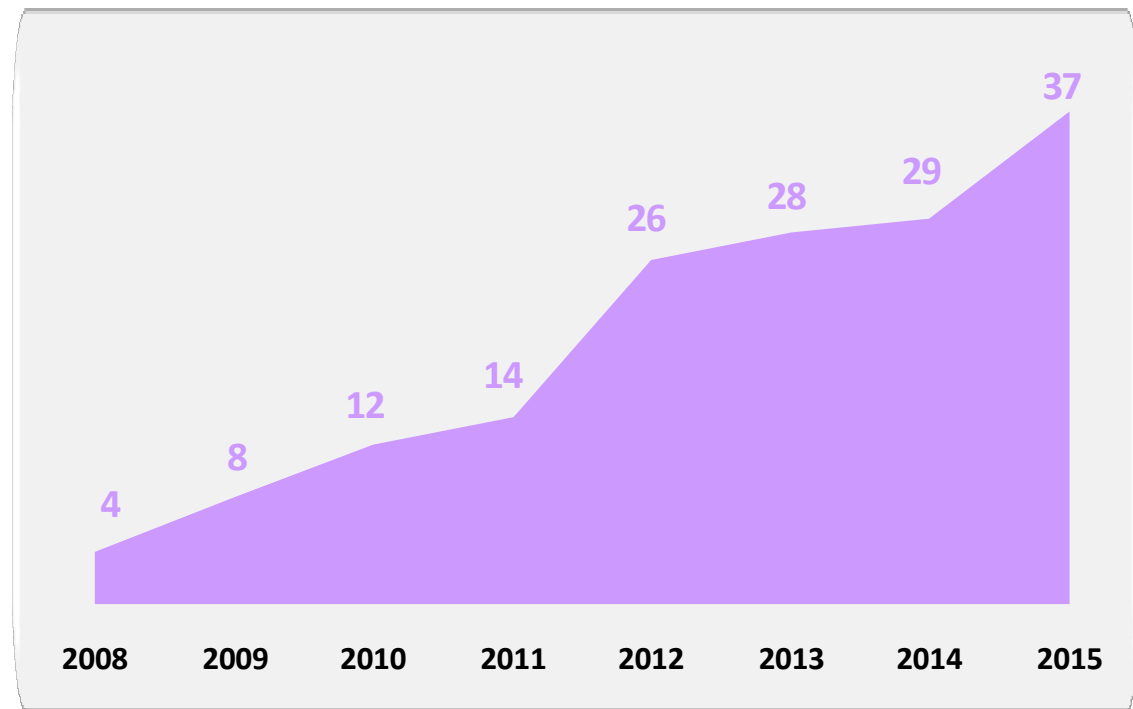
**2006 to 2008** : Austria, Netherlands, Finland, Sweden

**2009** : Denmark, Germany, Norway, USA

## **Forecasts**

**2010 à 2012 (included)** : Canada, Czech Republic, Estonia, France, Hong Kong, Hungary, Ireland, Italy, Latvia, Lithuania, Morocco, New Zealand, Portugal, Slovakia, Slovenia, South Korea, Spain, Taiwan, United Kingdom

**2013 to 2015** : Belarus, Bulgaria, Dominican Republic, Israel, Malaysia, Philippines, Poland, Serbia, South Africa, Turkey



Analogue Switch-off evolution and forecasts (Number of countries)






# Sales of new TV equipment boomed!

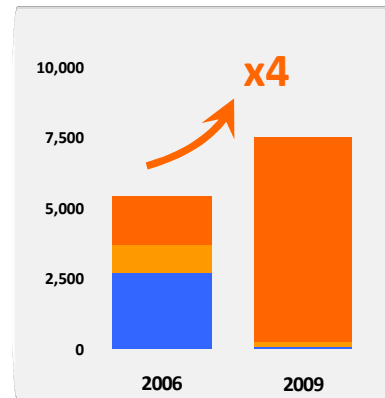
## Sales of TV sets

(in thousands of units)

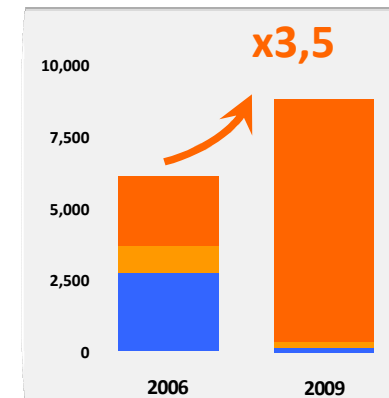
Source: GfK

-  CRT 'old style' TV
-  Flat screen SD (standard definition)
-  Flat screen HD (high definition)

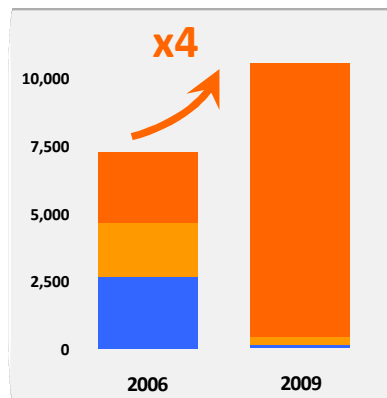
 France



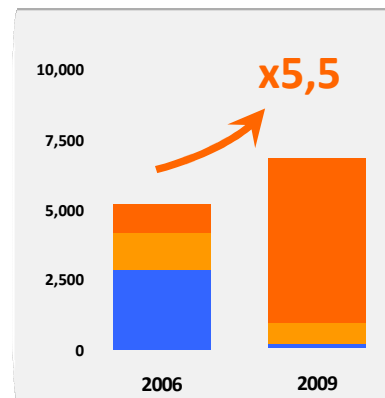
 Germany



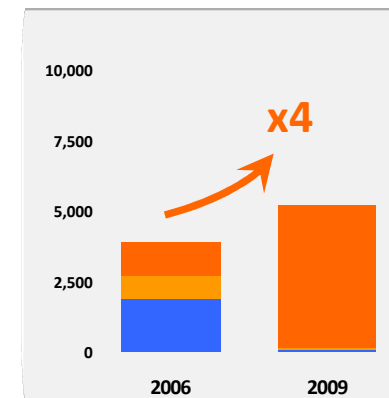
 United Kingdom



 Italy



 Spain



# Measuring Time Shifted Viewing: 22 countries by 2012 !

**2008 and before** : Canada, Denmark, Finland, Netherlands, Norway, United Kingdom, USA

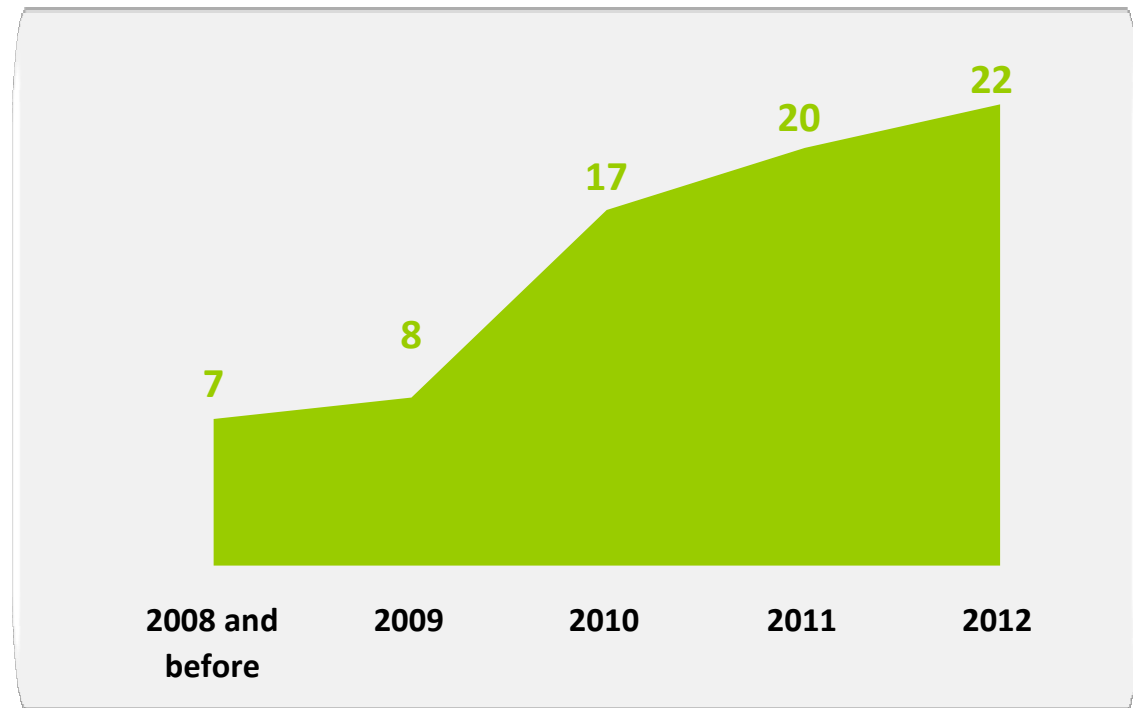
**2009** : Germany

*Forecasts:*

**2010** : Australia, Austria, Belgium, Ireland, Israel, Italy, Slovakia, South Africa, Sweden

**2011** : Armenia, France, Poland

**2012** : New Zealand, Switzerland



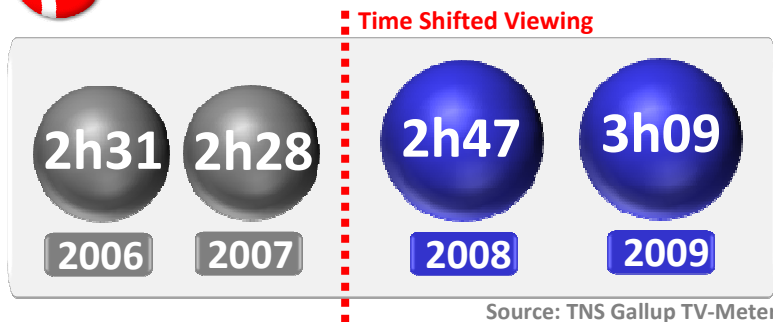
Number of countries measuring the Time Shifted Viewing

# Time shifted viewing makes all the difference!

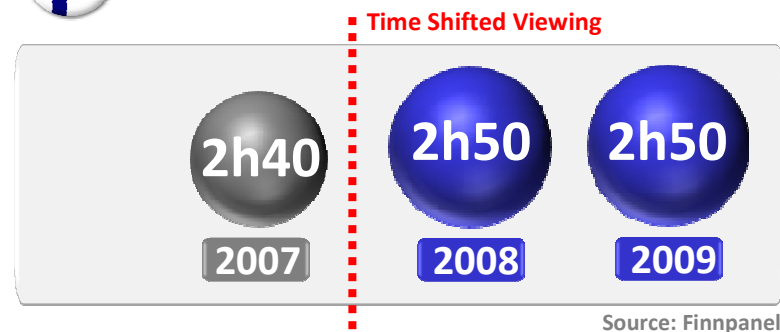
DVT evolution, after integrating Time Shifted Viewing in their measurement system.



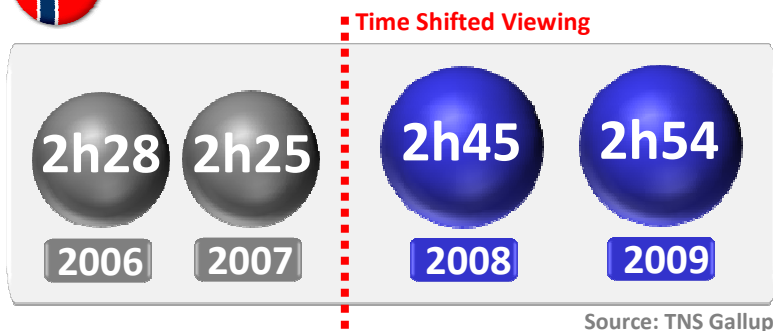
Denmark



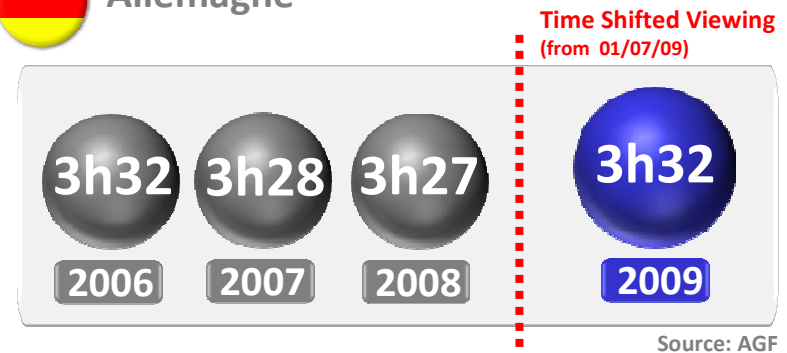
Finlande



Norvège



Allemagne



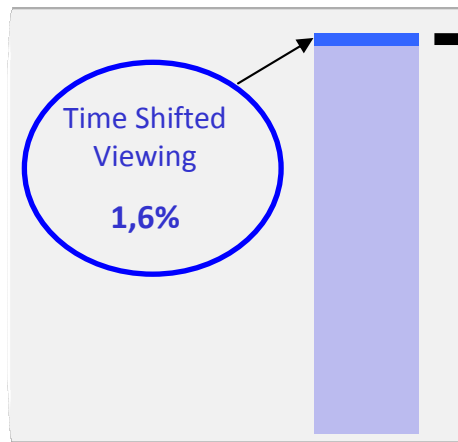
Source: Eurodata TV Worldwide / Relevant partners – All rights reserved



## 2/3 of TSV consumed within the next 48 hours

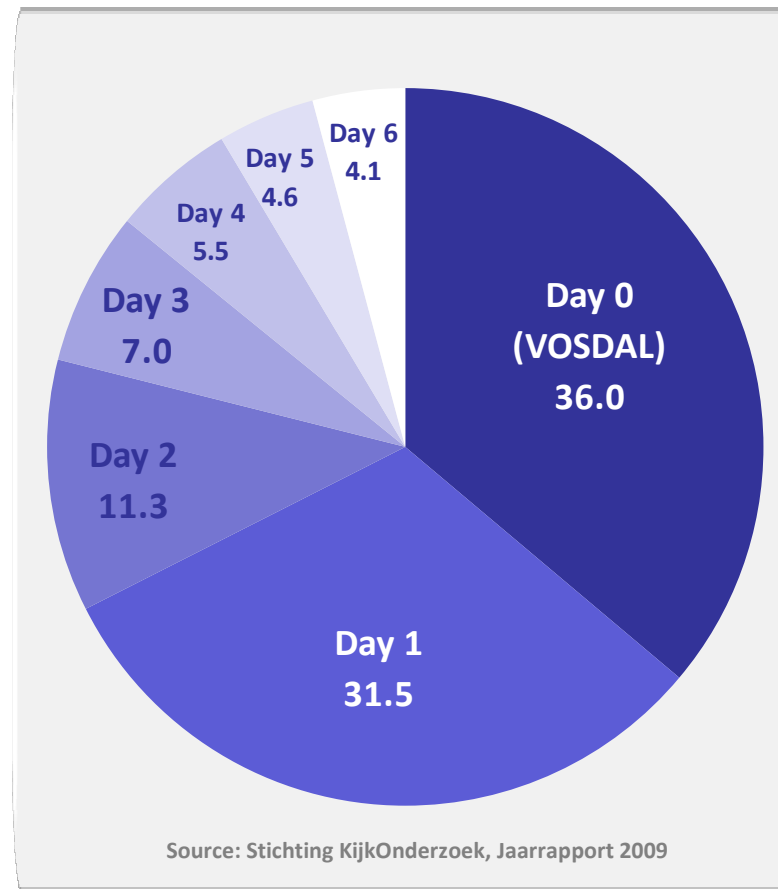
In the Netherlands, Time shifted viewing represent 1,6% of the TV consumption.

36% of the recorded programs are watched on the same day, and 31,5% the day after.



### Netherlands

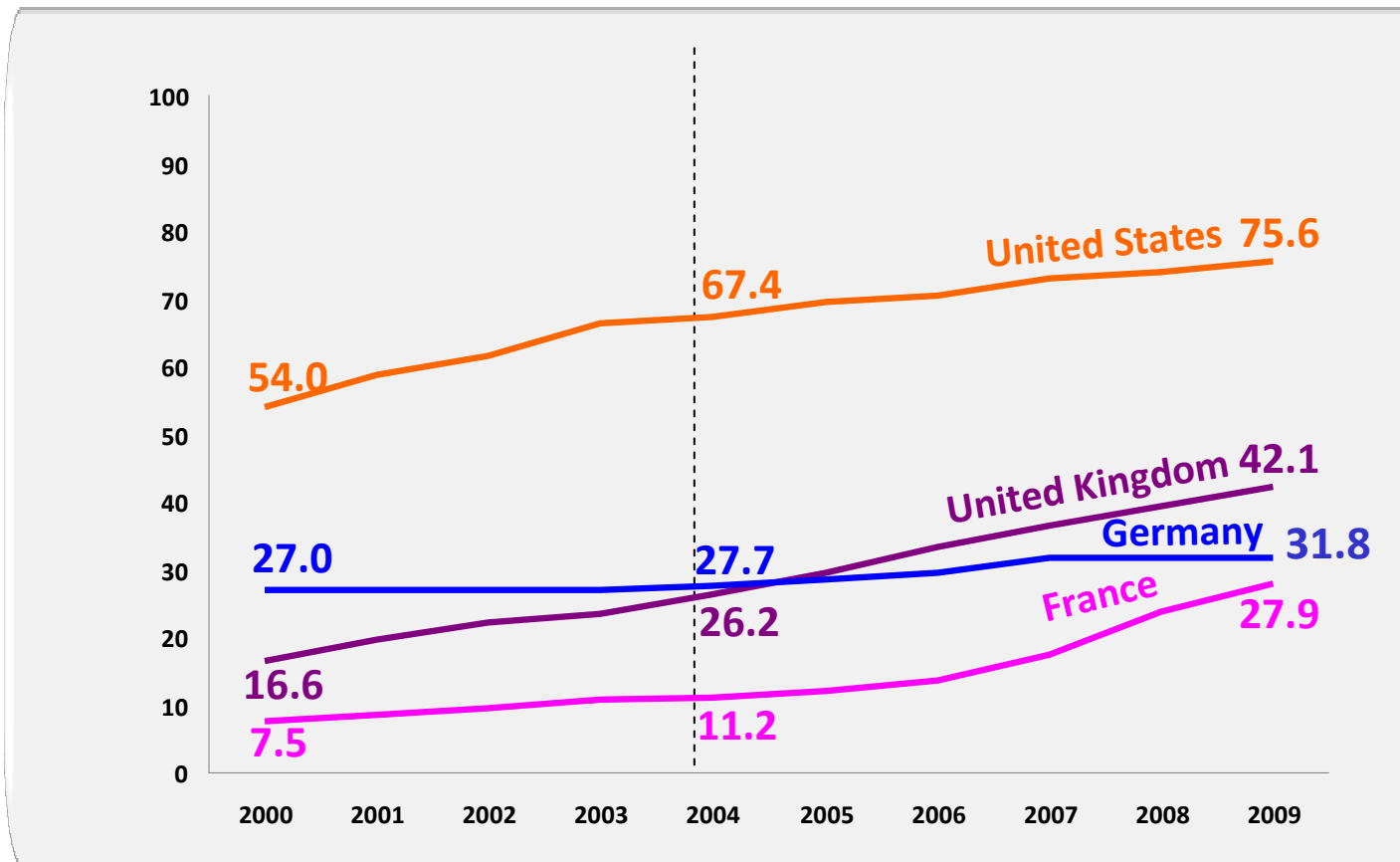
Distribution of time shifted viewing per day (2009)



# In the major countries, small channels are getting big...

## Evolution of the market shares of the « challengers »

(all channels except the historical leaders\*)

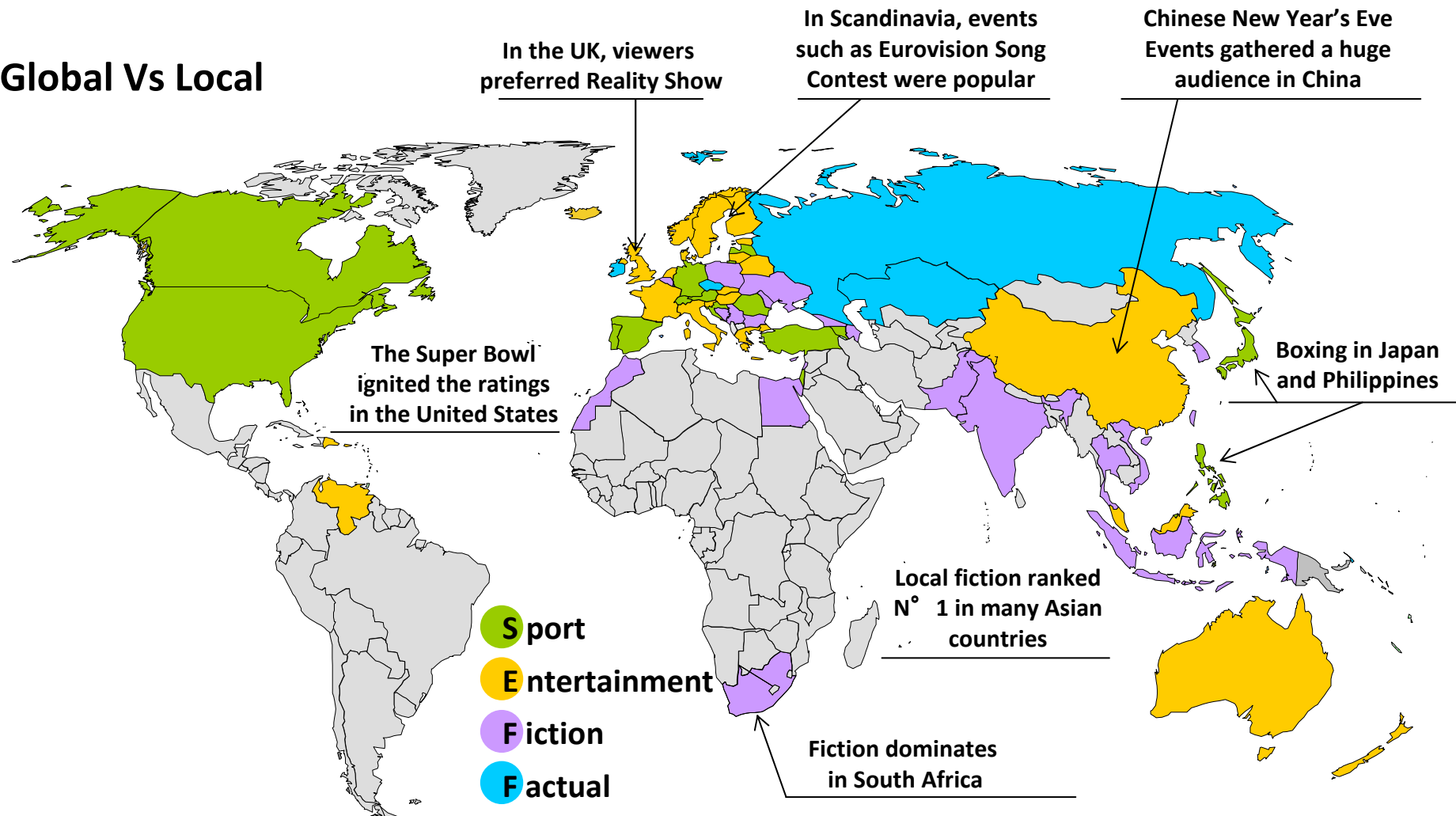


\*Historical Leaders: **USA:** CBS, ABC, NBC, FOX / **United Kingdom:** BBC1, ITV1, Channel 4, BBC2, Five / **Germany:** ARD 3, ARD 1, ZDF, RTL, Sat1, Pro7 / **France:** TF1, France 2, France 3, M6, France 5/Arte, Canal+

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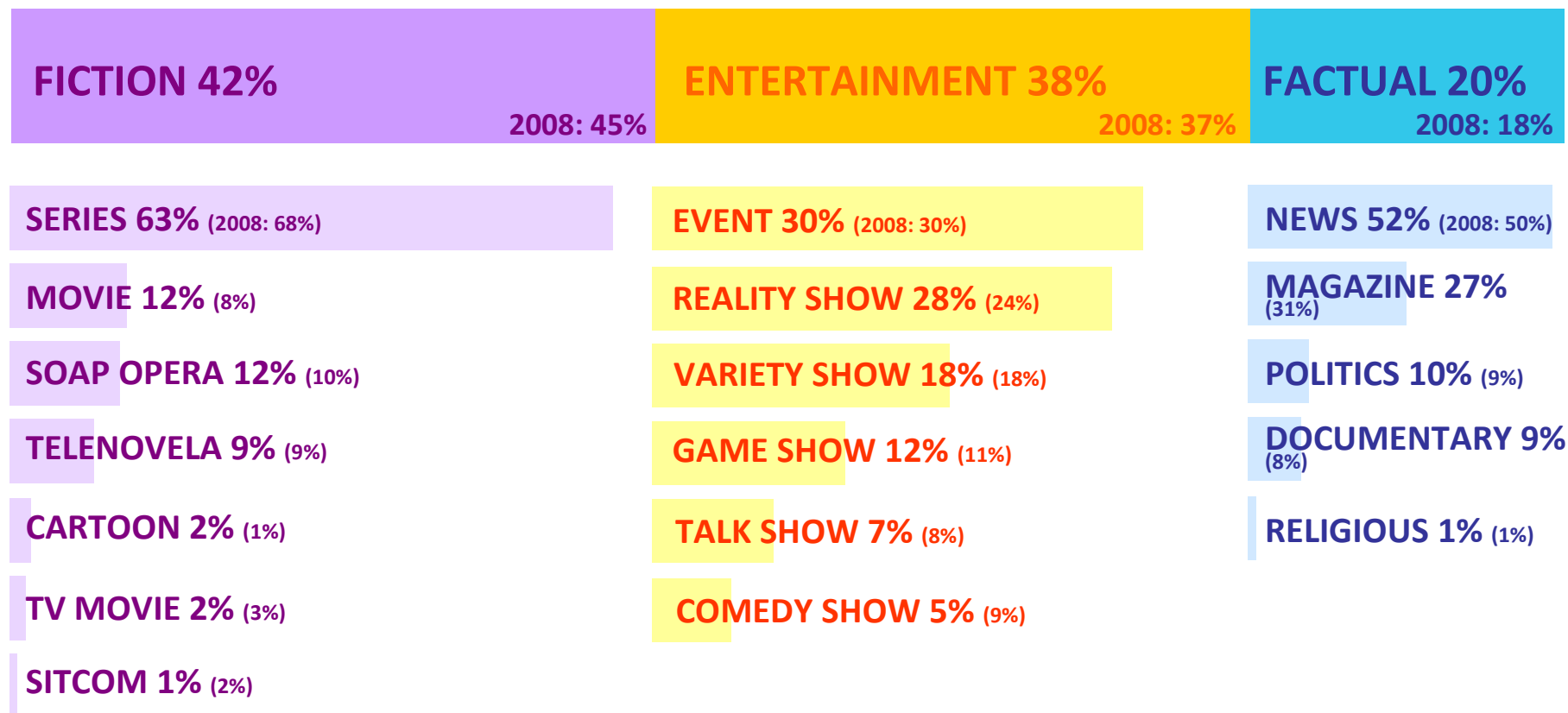
# TV content boosts TV consumption

## Global Vs Local



# Fiction is still leading the field... ...but has faltered in the crisis

Composition breakdown of top 10's by genre (excluding sport). 71 territories are included in the analysis.



# Across all genres, the big names hold their ground

Number of occurrences in 2009's top 10 rankers of 71 territories (based on best episode, excluding sport)\*

*The figure between parenthesis is the 2008 rank*

Reality Shows	Origin of the format	Number of countries
STRICTLY COME DANCING	UK	11 (12)
GOT TALENT	USA	10 (3)
IDOLS	UK	7 (6)
BIG BROTHER	Netherlands	5 (4)
THE X FACTOR	UK	5 (3)
STAR ACADEMY	Netherlands	4 (2)
SURVIVOR	Sweden	4 (4)
THE AMAZING RACE	USA	3 (-)
THE FARMER WANTS A WIFE	UK	3 (3)
THE FARM	Sweden	2 (2)

Game Shows	Origin of the format	Number of countries
DEAL OR NO DEAL	Netherlands	5 (2)
NOTHING BUT THE TRUTH	USA	4 (2)
WHO WANTS TO BE A MILLIONAIRE	UK	2 (4)

Event	Origin of the format	Number of countries
EUROVISION SONG CONTEST 2009 - FINAL	Europe	14 (12)

Series	Origin of the format	Number of countries
C.S.I. CRIME SCENE INVESTIGATION	USA	4 (4)
C.S.I. MIAMI	USA	4 (4)
HOUSE	USA	3 (2)
BINBIR GECE	Turkey	3 (2)

## International Audience Awards 2009

Winner Dr HOUSE with more than 81,8 millions viewers!



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# United Kingdom, generations TV

2009

## Top 10 programmes

Rank	Channel	Date	Start	Programme	Genre	Format	Origin	Audience	shr%
1	ITV1	Sa 30/05	21:31	BRITAIN'S GOT TALENT FINAL - RESULTS - (3rd in 2008)	Reality Show	UK	UK	18,294	68.1
2	ITV1	Su 13/12	19:29	THE X FACTOR - RESULTS - (2nd)	Reality Show	UK	UK	16,279	53.7
3	BBC1	Fr 25/12	21:01	THE ROYLE FAMILY - (9th)	Sitcom	-	UK	11,741	43.8
4	BBC1	Fr 25/12	20:00	EASTENDERS - (8th)	Soap Opera	-	UK	11,672	46.7
5	BBC1	Fr 25/12	17:59	DOCTOR WHO - (5th)	Series	-	UK	11,567	44.7
6	ITV1	Mo 02/02	19:33	CORONATION STREET - (4th)	Soap Opera	-	UK	11,456	41.0
7	ITV1	Su 22/03	18:55	DANCING ON ICE - (7th)	Reality Show	USA	UK	11,313	43.8
8	BBC1	Sa 19/12	20:41	STRICTLY COME DANCING - (6th)	Reality Show	UK	UK	11,292	43.4
9	ITV1	Sa 21/11	21:21	I'M A CELEBRITY - GET ME OUT OF HERE! - (10th)	Reality Show	UK	UK	10,861	41.7
10	ITV1	Su 13/12	21:34	I DREAMED A DREAM - THE SUSAN BOYLE STORY	Event	-	UK	10,794	39.1

2009

## Top 1 sport

BBC1	Mo 29/06	18:57	WIMBLEDON 2009 - MURRAY Vs WAWRINKA				Tennis	8552.9	37.7
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# United States, the reign of the idols

**2009**

## Top 10 programmes

Rank	Channel	Date	Start	Programme	Genre	Format	Origin	Audience	shr%
1	ABC	Su 22/02/09	20:30	ACADEMY AWARDS - (3rd in 2008)	Event	-	USA	36,310	28.9
2	FOX	Tu 13/01/09	20:00	AMERICAN IDOL (IDOLS) - (2nd)	Reality Show	UK	USA	30,424	23.5
3	ABC	Su 22/02/09	20:00	OSCAR'S RED CARPET 2009 - (9th)	Event	-	USA	24,357	19.9
4	CBS	Th 15/01/09	21:15	CSI - (6th)	Series	-	USA	24,246	19.3
5	NBC	Su 01/02/09	22:40	THE OFFICE - (>20)	Series	-	USA	22,905	21.3
6	ABC	Mo 09/03/09	20:00	DANCING WITH THE STARS - (10th)	Reality Show	USA	USA	22,829	18.5
7	NBC	Th 26/11/09	9:00	MACY'S THANKSGIVING DAY PARADE - (8th)	Event	-	USA	22,316	28.0
8	CBS	Tu 29/09/09	20:00	NCIS - (11th)	Series	-	USA	21,371	19.0
9	CBS	Tu 10/02/09	21:00	THE MENTALIST - (14th)	Series	-	USA	19,699	15.8
10	CBS	Su 08/02/09	20:00	GRAMMY AWARDS - (19th)	Event	-	USA	19,048	16.2

**2009**

## Top 1 sport

NBC	Su 01/02/09	18:32	SUPER BOWL XLIII - ARIZONA Vs PITTSBURGH	US Football	98,732	66.6
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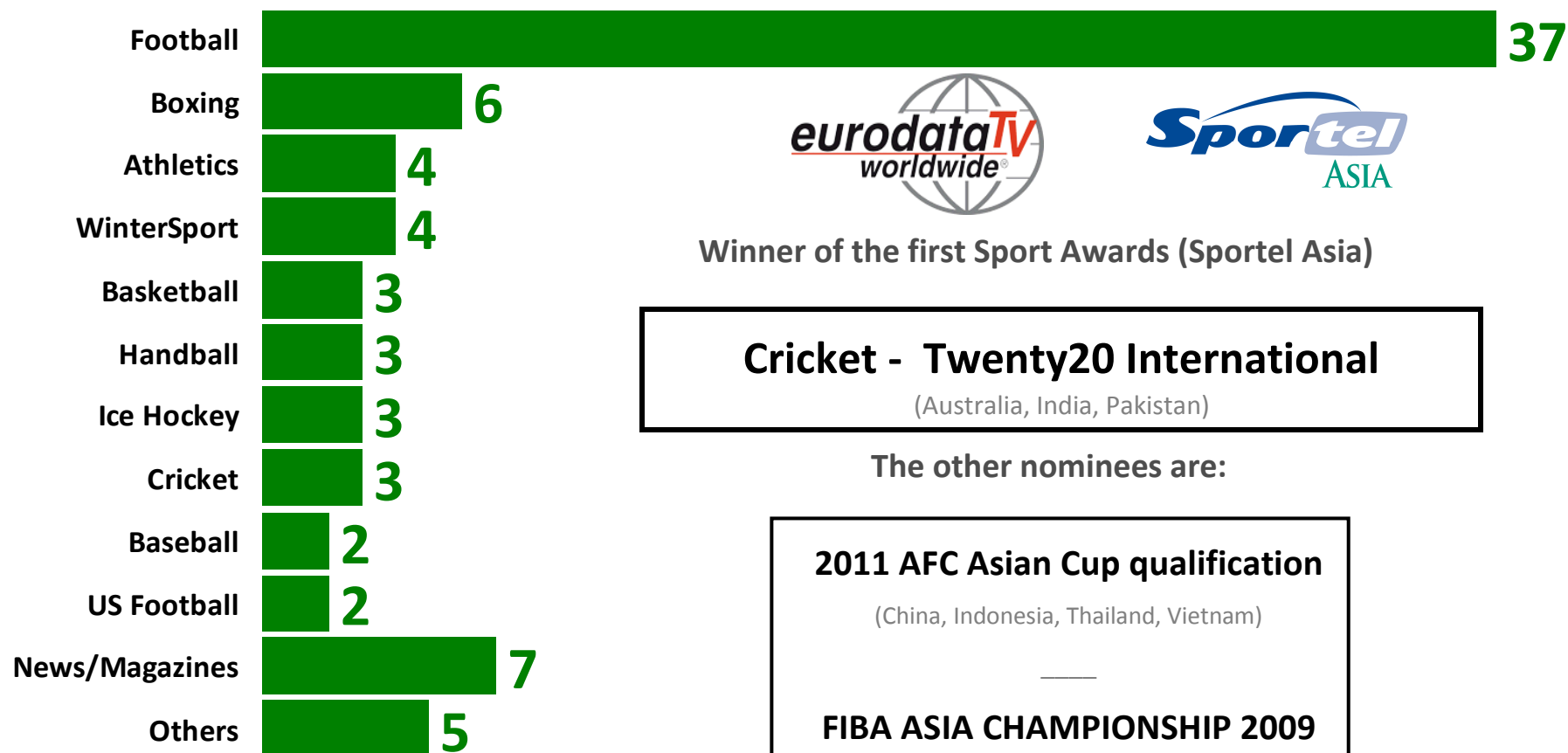
**And of course: Obama... Super Star !**

Sources: Eurodata TV Worldwide / Partenaires Audimétriques - Tous droits réservés



# Sport: The “king” football and the rest

Top 1 sport per genre, in 79 territories



Winner of the first Sport Awards (Sportel Asia)

**Cricket - Twenty20 International**

(Australia, India, Pakistan)

The other nominees are:

**2011 AFC Asian Cup qualification**

(China, Indonesia, Thailand, Vietnam)

**FIBA ASIA CHAMPIONSHIP 2009**

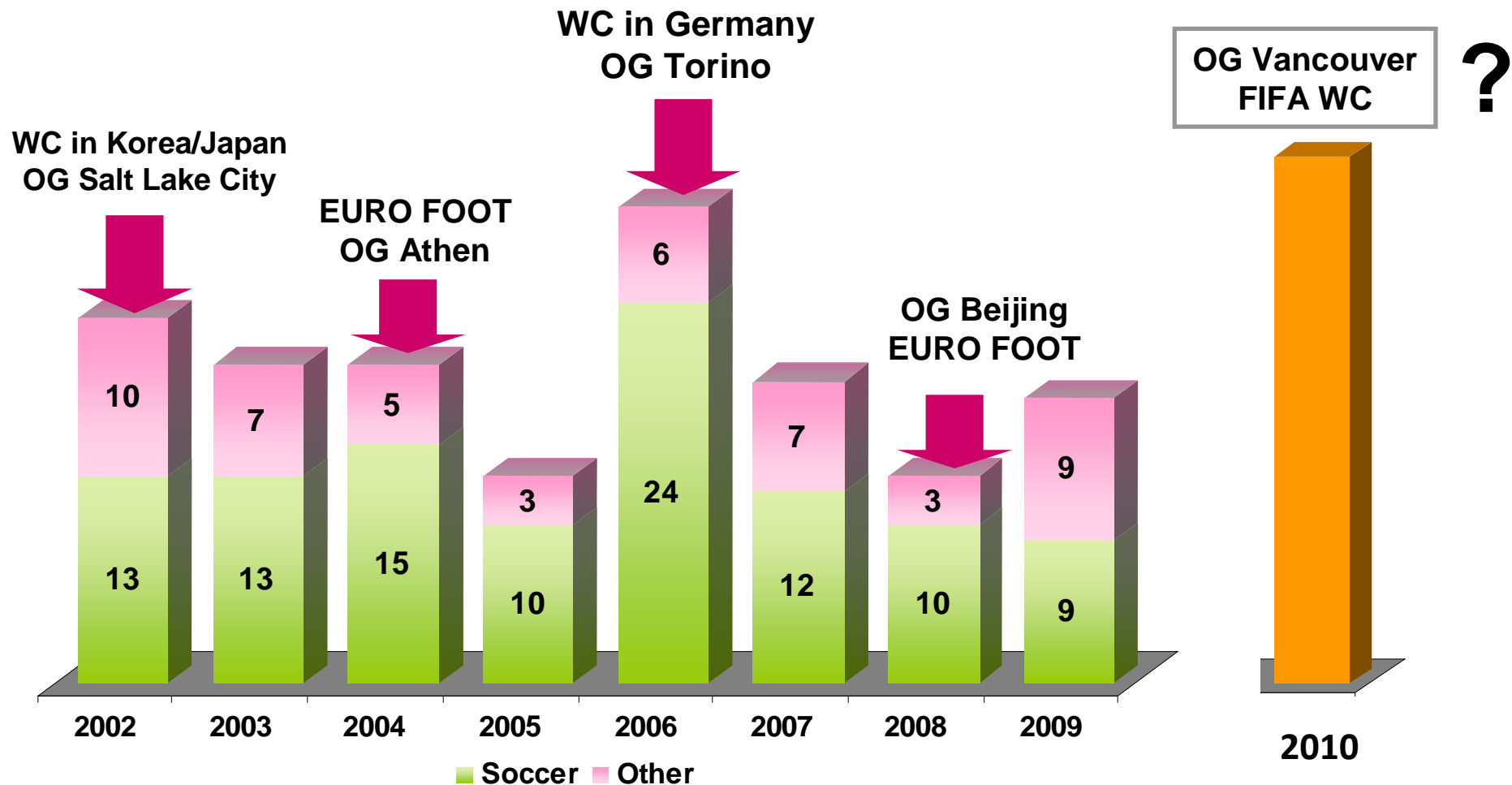
(China, Philippines, Taiwan)



Source: Eurodata TV Worldwide / Relevant partners – All rights reserved



# Past results may shed light on future trends



Number of territories where a Sport Event reached the best audience of the year in the countries analysed by EURODATA TV WORLDWIDE



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Coming next....

**NEW ON THE AIR**®

Press Conference before Mlp at  
Médiamétrie April 8th 2010



*festival*

DE TÉLÉVISION DE MONTE-CARLO

**5<sup>th</sup> International Audience Awards**

**Nominees in May**

**Winners on June 10th 2010**



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