European Commission
Directorate General Communication

OBSERVATOIRE EUROPÉEN DE L'AUDIOVISUEL
EUROPEAN AUDIOVISUAL OBSERVATORY
EUROPÄISCHE AUDIOVISUELLE INFORMATIONSSTELLE

Press Release

Strasbourg, 8 June 2011

DTT Update: as the 2012 deadline approaches…

- **As DTT roll-out progresses, the number of operators, platforms and channels continues to grow.**
- **In 2011, a further five EU countries will complete the transition from analogue to digital terrestrial transmissions, bringing the total to 16 EU (20 European).**
- **Just two EU countries (Bulgaria and Romania) have not yet launched DTT services, while the official launch of the Irish Saorview ('free' view)took place in May 2011**
- **There are now Pay DTT services in 14 EU countries (19 European).**
- **The number of channels available on all the DTT platforms now totals more than 1768 (including over 700 local channels).**
- **HD channels are available on DTT platforms in 13 EU countries.**
- **Public channels continue to play a very important role on the Free-to-Air platforms, and also as providers of HD services.**

Recent data from the MAVISE TV database, developed by the European Audiovisual Observatory for the DG Communication of the European Commission, shows the current status of the European television market. MAVISE contains data on the EU markets plus the candidates Croatia and Turkey.

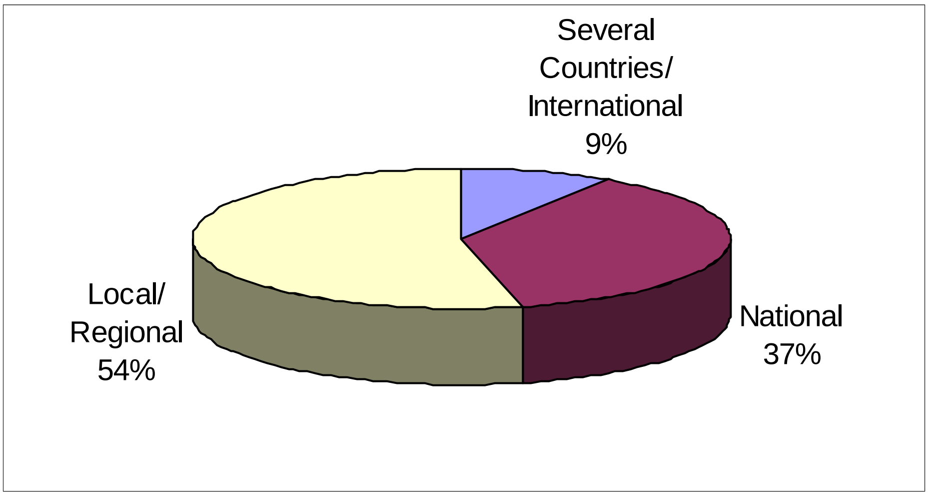
Switch-off

Analogue terrestrial switch-off has so far taken place in 15 European countries (Austria – in June 2011, Belgium, Croatia, Denmark, Estonia, Finland, Germany, Latvia, Luxembourg, Malta, the Netherlands, Norway, Slovenia, Spain, Sweden and Switzerland). This total should reach 20 by the end of 2011 (adding Cyprus, the Czech Republic, France, Malta and Iceland). By the end of 2011, 16 EU countries will have switched off analogue terrestrial signals.

Growth in DTT channels

The total number of channels on DTT networks is now almost 1,800 (compared to almost 1,500 in October 2010). The total includes a very large number of local channels although local/regional channels are only on the DTT platforms in 12 EU countries. There are very significant numbers of local channels in Italy, Spain and Denmark.

Fig 1: Split of DTT channels in the EU by coverage

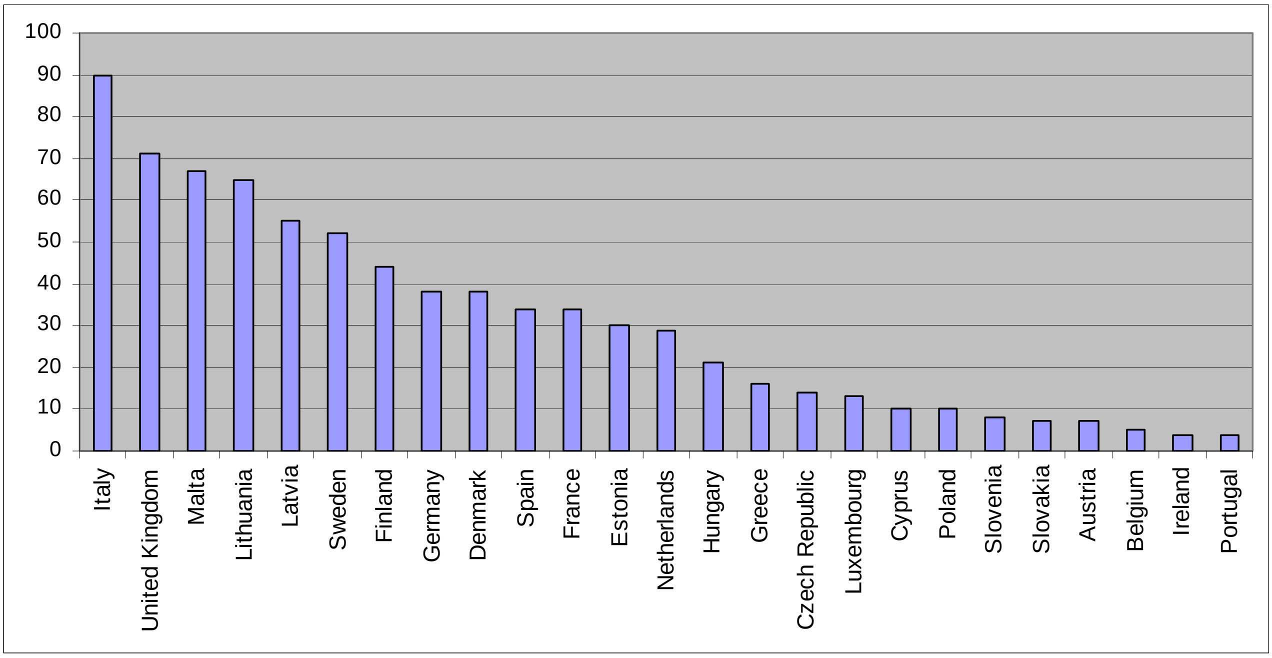


Source: MAVISE June 2011

The number of national and international channels available to DTT households (total on all packages) has increased to more than 820 in June 2011 (compared to 500 in April 2009). It should be noted that this includes many channels that are appearing on the DTT networks in more than one country, including many Pan-European channels.

In the EU, the number of channels available nationally varies widely between countries as below in fig 2. The maturity of the DTT market, the sharing of frequencies between channels and the availability of pay TV packages may influence this. For example, the most recent launches in Ireland and Portugal have the least number of channels. At the other end of the scale, Italy has a far higher number of national channels than all other EU countries.

Fig 2: National Channels on DTT networks in the EU

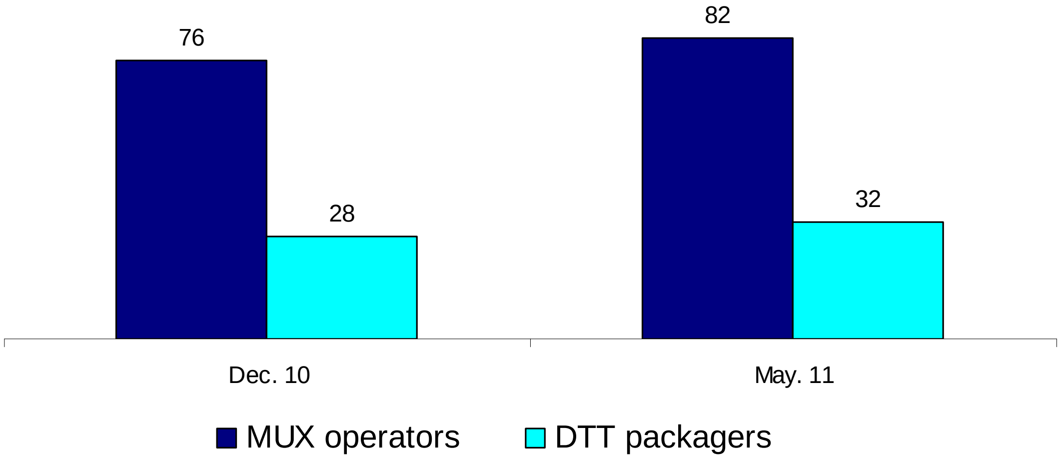


Source: MAVISE June 2011

Growth in the number of platforms and operators

As DTT roll-out continues, the number of operators also continues to grow. This reflects both the recent launches of DTT in several countries, and also the addition of new Pay DTT services, or regional/local multiplexes in others.

Fig 3: Growth of number of DTT operators 2011

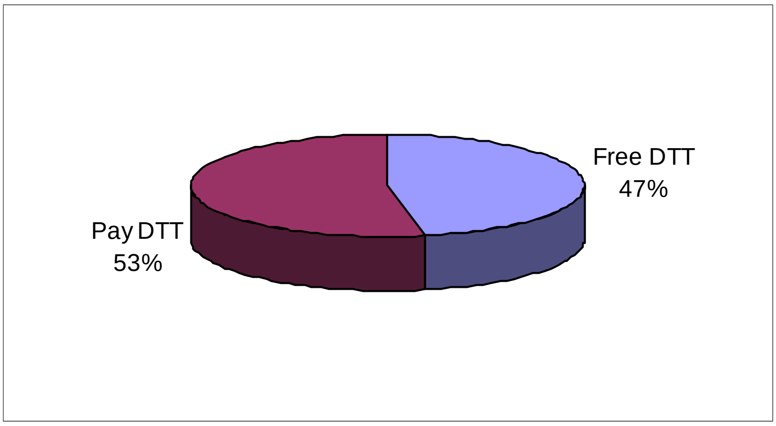


Source: MAVISE June 2011

Pay DTT services in June 2011

Pay DTT services are available in 14 EU countries, Germany (limited), the United Kingdom, Italy, Denmark, Estonia, Spain, Finland, Latvia, Lithuania, Malta, France, Hungary, the Netherlands, Sweden, and also in various non-EU European countries such as Iceland, Albania, Norway, the former Yugoslav Republic of Macedonia and Switzerland. There is a balance between the number of national channels available via Pay and FTA platforms. Local channels appear primarily on the FTA DTT platforms.

Fig 4: Division between FTA and PAY DTT National channels in the EU

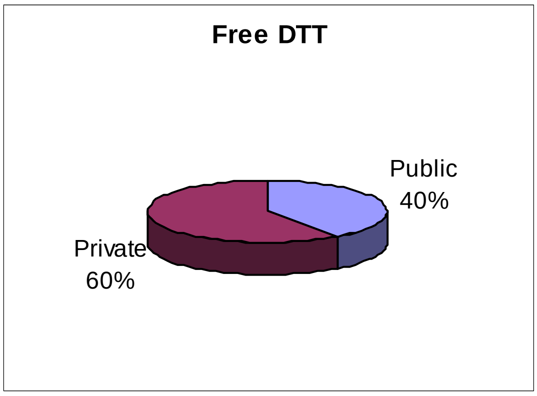


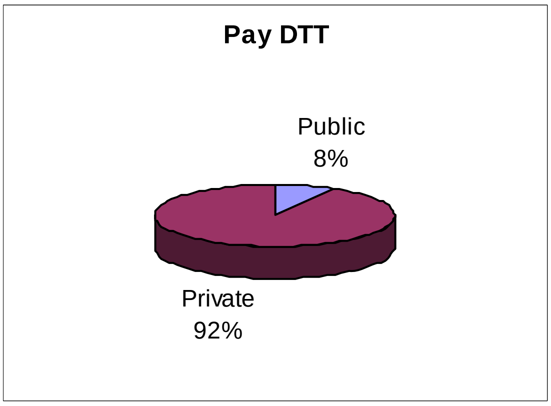
Source: MAVISE June 2011

Public and private

The public channels continue to play an important role on the FTA platforms (more than one third of these are public channels) but logically less so on the pay platforms (less than 10% are public).

Fig 5: Proportion of Public/ Private National DTT channels in the EU: Free and Pay platforms



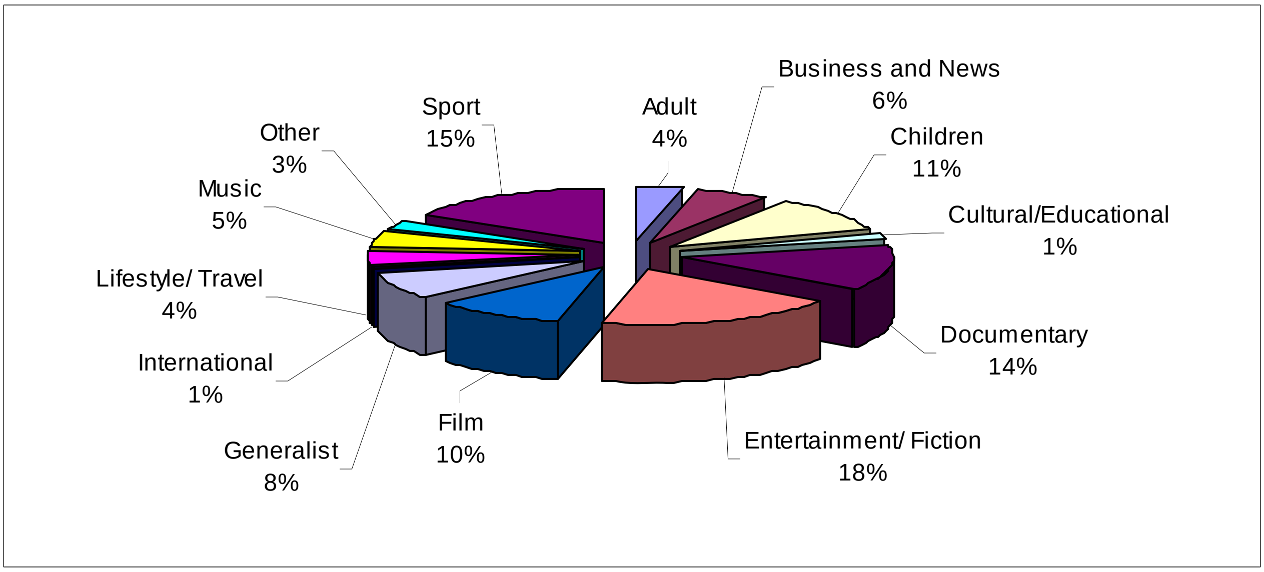


Source: MAVISE June 2011

Genre of TV channels

There is a strong distinction between the variety of genres on pay and FTA DTT platforms. This is also logical as the FTA platforms have a stronger presence of the national generalist channels, while the Pay platforms have a much higher number of, for example, film, sports and documentary channels

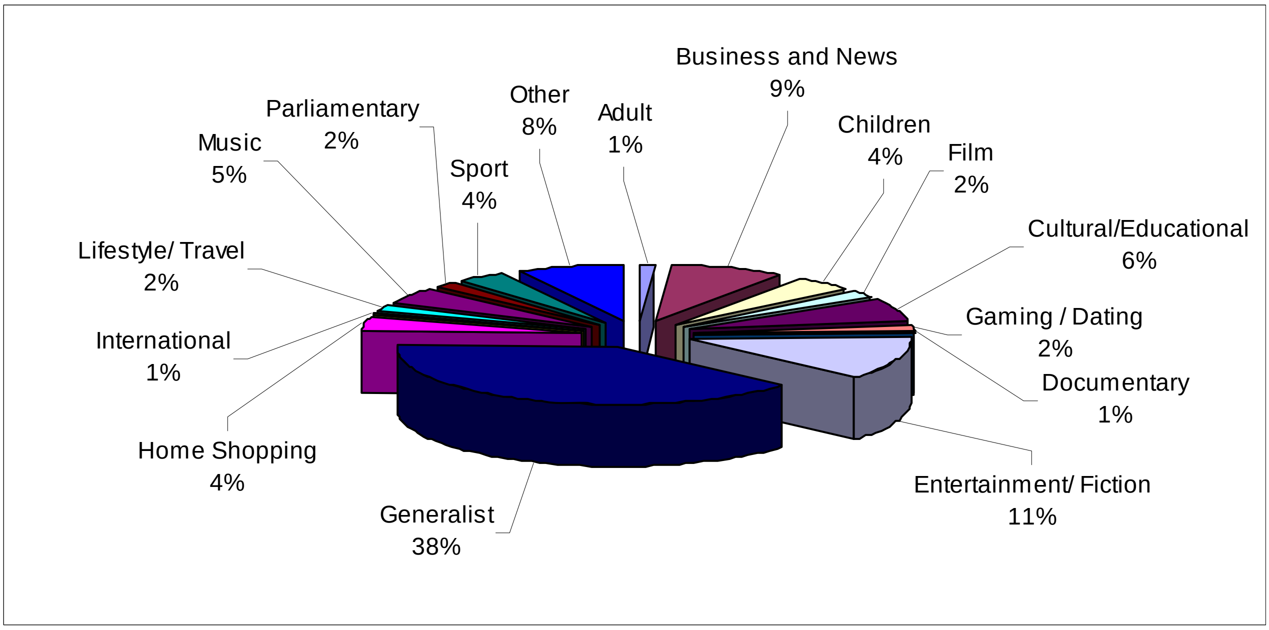
Fig 6: Genre of channels on Pay DTT networks in the EU (excluding local)



Source: MAVISE June 2011

Cultural and educational channels have a stronger presence on FTA platforms. Home Shopping channels are also more common on the free platforms.

Fig 7: Genre of channels on FTA DTT networks in the EU (excluding local)

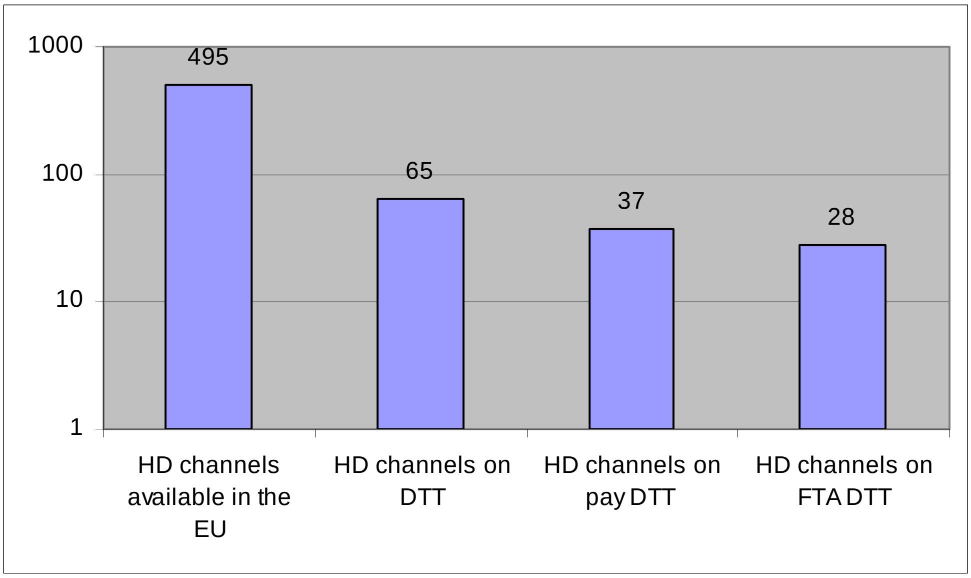


Source: MAVISE June 2011

HD channels

HD channels are available on DTT platforms in 13 EU countries (as compared to 8 in October 2010): Czech Republic, Denmark, Finland, France, Greece, Hungary, Italy, Latvia, Lithuania, Luxembourg, Spain, Sweden, the United Kingdom and also in Norway. HD channels are available on both FTA and Pay platforms in most of these countries (except Latvia and Lithuania where HD is on Pay DTT only). On the FTA platforms, the channels are the simulcast or HD versions of the major national public and private generalist channels. On the pay TV platforms the HD channels are niche channels, film channels and pan-European documentary channels. 3D DTT tests are being carried out in several EU countries (Italy, the Netherlands, Spain, Sweden, the United Kingdom etc.). 3DVoD is already available in Italy.

Fig 8: HD Channels in the EU and on DTT platforms



Source: MAVISE June 2011

MAVISE is a free online database unique in its kind, developed by the European Audiovisual Observatory for the DG Communication of the European Commission. It provides a full overview of all EU television markets plus Croatia and Turkey. There are now a total of 7,536 channels (plus 958 non-European channels) available in the 29 countries. **MAVISE** contains detailed information on over 5,800 TV companies, as well as the line-ups of approximately 500 DTT, cable, satellite, IPTV or DVB-H packagers.

MAVISE offers a wide range of sophisticated search possibilities of TV channels according to criteria such as genre, geographical coverage, language, specific target audience.

The **MAVISE** database is available at http://mavise.obs.coe.int

Methodological note

In a constantly changing television landscape we realise that no figure can be absolute. However, the research and resulting data provided by the European Audiovisual Observatory can be regarded as a fairly reliable overview of the European television market. MAVISE and the data it contains are constantly being up-dated to follow as closely as possible the developments of this extremely complex market. Furthermore, please note that different linguistic versions of a TV channel are considered as separate channels.

The identification of existing TV channels is done by comparing data provided by various sources such as the lists of licences issued by regulatory authorities, the line-ups of satellites (as provided by Lyngsat website), the line-ups of cable, IPTV, DTT and DVB-H operators (as published on their websites), the Observatory's network of correspondents and the trade press.

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The Directorate-General Communication of the European Commission

The mission of the Directorate-General for Communication is to:

- ***provide the citizens of the 27 countries of the European Union with information on EU policies and the direct implications on their daily lives by using all appropriate means, such as the web portal Europa.eu, EuTube and the Europe Direct network and contact centre;***
- ***promote increased media coverage of European Affairs - in full editorial independence – by providing financial support to the Euronews TV channel and to media networks such as the Presseurop.eu portal and the Euranet radio network. Furthermore, the European Commission provides broadcasters with sound and images, both live and from the archives, as well as a calendar of EU events at http://ec.europa.eu/avservices/.***

The European Commission supports media pluralism and editorial independence.

The European Audiovisual Observatory

Set up in December 1992, the European Audiovisual Observatory's mission is to gather and distribute information on the audiovisual industry in Europe. The Observatory is a European public service body comprised of 37 member states and the European Union, represented by the European Commission. It operates within the legal framework of the Council of Europe and works alongside a number of partner and professional organisations from within the industry and with a network of correspondents. In addition to contributions to conferences, other major activities are the publication of a Yearbook, newsletters and reports, the compilation and management of databases and the provision of information through the Observatory's Internet site (http://www.obs.coe.int).

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