digital TV research

January 2016

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Digital TV Research latest publication schedule

2016	
Digital TV Middle East & North Africa Forecasts	*January*
Digital TV Sub-Saharan Africa Forecasts	*January*
2015	
Global SVOD Forecasts	*November*
Global Pay TV Operator Forecasts	*October*
Eastern Europe Middle East & Africa Pay TV Operator Forecasts	*September*
Asia Pacific Pay TV Operator Forecasts	*September*
Western Europe Pay TV Operator Forecasts	*September*
Connected TV Forecasts	*August*
Americas OTT TV & Video Forecasts	*July*
Eastern Europe, Middle East & Africa OTT TV & Video Forecasts	*July*
Western Europe OTT TV & Video Forecasts	*July*
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Digital TV World Revenue Forecasts	*May*
Digital TV World Household Forecasts	*May*
Digital TV Western Europe Forecasts	*April*
Digital TV Eastern Europe Forecasts	*April*
Digital TV North America Forecasts	*March*
Digital TV Latin America Forecasts	*March*
Digital TV Asia Pacific Forecasts	*March*

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Pay DTT gains in Sub-Saharan Africa as satellite stutters

2015 was yet another momentous year for television in Sub-Saharan Africa. Most countries missed the ITU's analog switch-off deadline of June, but DTT, especially pay DTT, made huge gains. And there is much more to come, partly as Canal Plus unveils its TNT Afrique DTT platform in Francophone countries.

However, the number of pay satellite TV subscribers climbed by a relatively low 7.4% in 2015, according to a new report from Digital TV Research. This was partly due to greater platform choice created by DTT and partly due to economic woes in some countries.

Available in more than 50 countries, DStv had 2.24 million subscribers outside South Africa by September 2015; down from 2.56 million six months earlier and down from 2.36 million a year earlier. Digital TV Research estimates that this total fell to 2.16 million by end-2015, with 2016 also expected to be tough.

Simon Murray, author of the fifth edition of the **Digital TV Sub-Saharan Africa Forecasts** report, said: "DStv's problems stem mostly from its rights to exclusive premium content, especially sports. Currency devaluation in most Sub-Saharan countries hit DStv hard. Exclusive content rights for premium content such as English Premier League soccer are usually paid for in US dollars. DStv has been compelled to increase its local currency subscription fees to cover the shortfall due to devaluation. As a result, DStv appears more expensive to locals. To try and attract new subs, DStv has substantially reduced its decoder prices."

Despite these negative factors, there are plenty of reasons for cheer. Nearly two-thirds of TV homes (36.2 million) took digital signals by end-2015, up from 18.7% (7.9 million) in 2010. Complete digital transition was achieved in Gabon, Kenya, Malawi, Rwanda, Tanzania and Uganda by end-2015. This count will increase from six countries at end-2015 to 11 by end-2016. Digital TV penetration will reach 99.9% in 35 forecast countries by 2021 – or 74.7 million homes.

About two-thirds (50.95 million) of TV households will take DTT (pay and free-to-air combined) as their primary TV signal in 2021, up from only 1.4% (0.59 million) at end-2010. By 2021, 14.85 million – nearly a fifth of TV households - will be primary pay DTT and 36.10 million free-to-air DTT (or 48.3% of TV homes).

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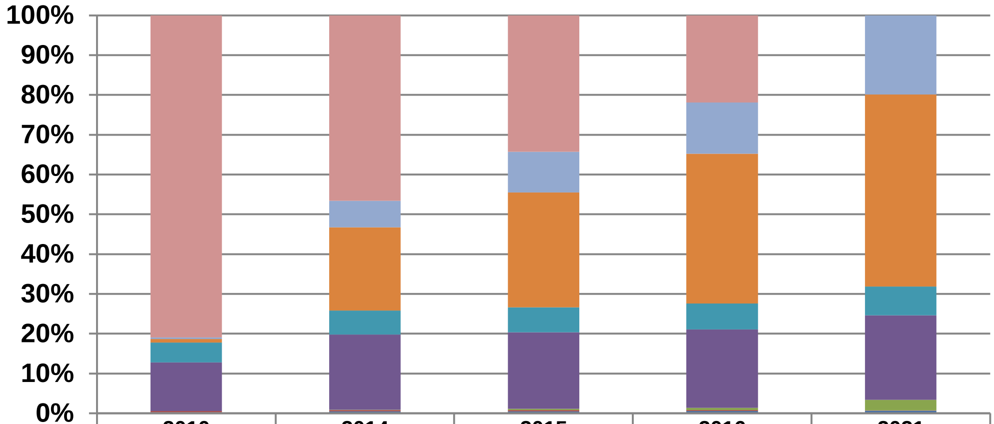
Split of TV households by platform (000)



	2010	2014	2015	2016	2021
Analog terres	34,400	24,514	18,969	12,774	0
Pay DTT	163	3,512	5,639	7,514	14,850
FTA DTT	368	10,966	15,973	21,939	36,101
FTA sat	2,120	3,176	3,485	3,790	5,427
Pay sat	5,201	9,927	10,660	11,479	15,877
Pay IPTV	0	68	170	344	1,969
Analog cable	142	178	169	153	55
Digital cable	91	238	271	320	483

Source: Digital TV Research

DTT will challenge satellite as the top pay TV platform by 2021. In fact, satellite TV will only grow from 19.3% of TV households in 2015 to 21.2% by 2021, whereas pay DTT will rocket from 10.2% to 19.9% over the same period.

Of the 16.91 million pay TV subscribers at end-2015, 10.66 million were pay satellite TV and 5.64 million pay DTT. The pay total will more than double to 33.23 million by 2021, with satellite TV contributing 15.88 million and pay DTT another 14.85 million.

South Africa supplied 5.95 million of the 2015 regional pay TV subs; growing to 8.62 million by 2021. Nigeria will close in on South Africa; increasing from 3.63 million in 2015 to 7.52 million in 2021.

For more information on **the fifth edition of the Digital TV Sub-Saharan Africa Forecasts report**, *please contact: Simon Murray, simon@digitaltvresearch.com, Tel: +44 20 8248 5051*

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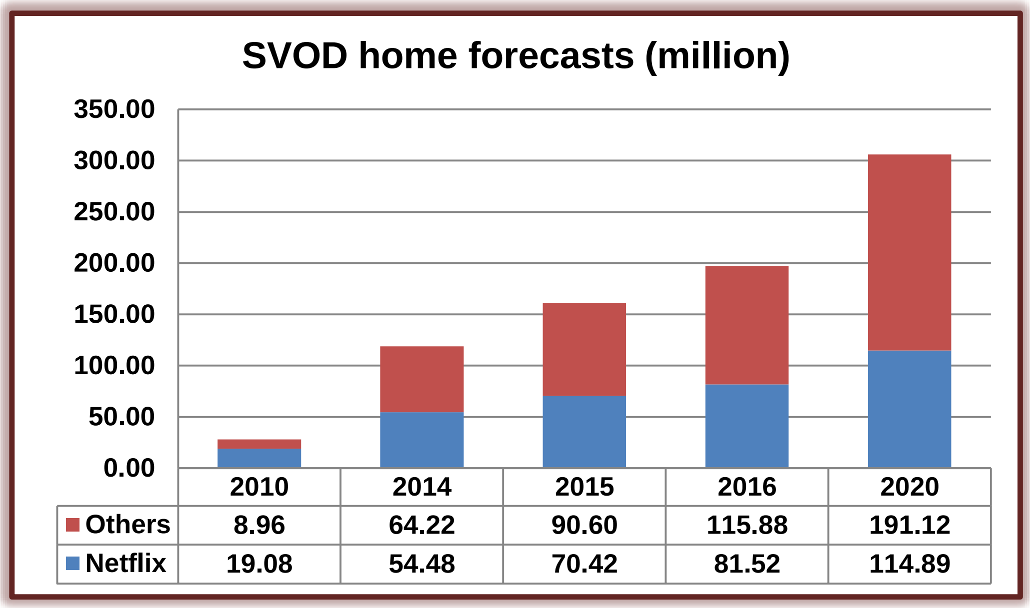
Netflix to reach 115 million subscribers

The number of SVOD [subscription video on demand] homes is forecast to reach 306 million across 200 countries by 2020, up massively from 28 million in 2010 and an expected 161 million by end-2015, according to a new report from Digital TV Research. The total will grow by 42 million in 2015 alone.

The **Global SVOD Forecasts** report estimates that nearly 145 million SVOD subscribers will be added between 2015 and 2020 (up by 90%). China will increase by 20 million subs, with the US bringing in an extra 22 million, Japan 9 million and India more than 7 million.



	2010	2014	2015	2016	2020
Others	8.96	64.22	90.60	115.88	191.12
Netflix	19.08	54.48	70.42	81.52	114.89

Source: Digital TV Research

Netflix is forecast to have almost 115 million paying subscribers by 2020, adding 44 million subs between 2015 and 2020. Netflix will have 50.4 million subs in the US by 2020 – up by 7 million on 2015.

Global SVOD revenues [for all operators in 200 countries] will reach $26,794 million in 2020; 10 times the $2,644 million recorded in 2010 and more than double the $12,375 million expected in 2015. Subscription revenues for Netflix will rocket from $1.8 billion in 2010 to $12.2 billion in 2020.

For more information on **the Global SVOD Forecasts report**, *please contact: Simon Murray, simon@digitaltvresearch.com, Tel: +44 20 8248 5051*

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Seven hurdles for Netflix to overcome before it can achieve a true global presence

At CES in January, Reed Hastings, CEO of Netflix, announced its launch in 130 more countries, bringing its total reach to more than 190 countries. This is a bold and courageous move to create a global SVOD platform. However, Netflix is aware that there is still plenty of work to do in order to create a worldwide business. These are the main obstacles that Netflix needs to address:

1. **China.** Nobody said that it was ever going to be easy. Netflix stated that it will only have a limited impact in China and anticipates a relatively long wait before entering the market. First, the company needs government approval [not at all easy for foreign media companies]. Next, it will also almost certainly needs to partner with a local player - partly to satisfy the government and partly due to the difficulties for foreign media companies operating alone in China. China already has several well-established local SVOD players.

2. **Local distribution deals.** Can Netflix operate solely as a global player or does it need local help? Netflix signed distribution deals with pay TV operators in several of its existing markets to aid subscription take-up, so this is expected to continue in its new markets.

3. **Local language.** As well as the 17 existing languages, Netflix has added Arabic, Chinese and Korean. Other major languages are certain to follow. Until then, how many Polish homes will subscribe to an English-language Netflix?

4. **Local content.** Hollywood TV and movie output certainly has worldwide appeal, but interest is also piqued by local content. Netflix will have to include local content in major markets to stimulate interest and also to ward off competitors.

5. **Pricing.** A Netflix subscription in India starts at INR500/month ($7.50). This is really expensive by local standards and compared to its competitors. Does Netflix need to introduce some flexibility here?

6. **Payment.** Outside North America, credit card ownership is not necessarily high. Netflix overcame this problem in Latin America by introducing prepaid cards.

7. **Broadband penetration.** Fixed broadband penetration is growing fast, but it is still very low in some major markets (such as India). Mobile broadband penetration is growing even faster. Mobile SVOD has already taken off in the Far East and is spreading across the rest of the region and into Africa and the Middle East. However, data charges can be high. Furthermore, the viewing experience on a mobile phone does not match that of a TV set (although there are ways to project content from mobiles to other devices with larger screens).

All businesses face challenges, and I am sure that Netflix is well aware of the seven listed above. Netflix should be congratulated on its ambitious expansion plans.

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Digital TV Research publication schedule for 2016			
	Title	*Publication Date*	Price
1	Digital TV Sub-Saharan Africa Forecasts	*January*	£900/$1350/€1125
2	Digital TV Middle East & North Africa Forecasts	*January*	£900/$1350/€1125
3	Digital TV Asia Pacific Forecasts	*March*	£900/$1350/€1125
4	Digital TV Latin America Forecasts	*March*	£900/$1350/€1125
5	Digital TV North America Forecasts	*March*	£500/$750/€625
6	Digital TV Eastern Europe Forecasts	*April*	£900/$1350/€1125
7	Digital TV Western Europe Forecasts	*April*	£900/$1350/€1125
8	Digital TV World Household Forecasts	*April*	£1300/$1950/€1625
9	Digital TV World Revenue Forecasts	*May*	£1300/$1950/€1625
10	Digital TV World Databook	*May*	£800/$1200/€1000
11	Middle East & Africa OTT TV & Video Forecasts	*May*	£900/$1350/€1125
12	Asia Pacific OTT TV & Video Forecasts	*June*	£900/$1350/€1125
13	Latin America OTT TV & Video Forecasts	*June*	£900/$1350/€1125
14	North America OTT TV & Video Forecasts	*June*	£500/$750/€625
15	Eastern Europe OTT TV & Video Forecasts	*July*	£900/$1350/€1125
16	Western Europe OTT TV & Video Forecasts	*July*	£900/$1350/€1125
17	Global OTT TV & Video Forecasts	*July*	£1500/$2250/€1875
18	Asia Pacific Pay TV Operator Forecasts	*August*	£900/$1350/€1125
19	Middle East & Africa Pay TV Operator Forecasts	*August*	£900/$1350/€1125
20	Latin America Pay TV Operator Forecasts	*August*	£900/$1350/€1125
21	North America Pay TV Operator Forecasts	*September*	£500/$750/€625
22	Eastern Europe Pay TV Operator Forecasts	*September*	£900/$1350/€1125
23	Western Europe Pay TV Operator Forecasts	*September*	£900/$1350/€1125
24	Global Pay TV Operator Forecasts	*October*	£1500/$2250/€1875
25	Middle East & Africa SVOD Forecasts	*October*	£900/$1350/€1125
26	Asia Pacific SVOD Forecasts	*October*	£900/$1350/€1125
27	Latin America SVOD Forecasts	*November*	£900/$1350/€1125
28	North America SVOD Forecasts	*November*	£500/$750/€625
29	Eastern Europe SVOD Forecasts	*November*	£900/$1350/€1125
30	Western Europe SVOD Forecasts	*December*	£900/$1350/€1125
31	Global SVOD Forecasts	*December*	£1500/$2250/€1875

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UK Digital TV Data

Platform universe (000)						
	2010	**2011**	**2012**	**2013**	**2014**	**2015**
TV households	26,224	26,201	26,452	26,197	26,130	26,034
Digital satellite	11,012	11,509	11,462	11,429	10,997	11,137
Digital cable	3,997	3,822	4,029	4,137	4,037	3,933
Digital terrestrial	18,376	20,075	19,633	19,327	18,888	18,579
Total digital	24,574	25,711	26,452	26,197	26,130	26,034
Analog cable	25	0	0	0	0	0
Analog satellite	108	0	0	0	0	0
Analog terrestrial	1,557	490	0	0	0	0
Total analog	1,690	490	0	0	0	0
Source: BARB						

Sky UK & Ireland operational results (000)

	Dec-12	Dec-13	Dec-14	Sep-15
Retail	10,742	11,330	11,750	12,078
Wholesale	3,751	3,624	4,080	4,051
Total customers	**14,493**	**14,954**	**15,830**	**16,129**
Paid-for products	29,513	33,307	36,555	38,795
Monthly ARPU	£45	£46	£47	£47
Churn	10.4%	10.8%	9.2%	9.8%
Source: Sky				

Virgin Media UK operating highlights

	2010	2011	2012	2013	2014	3Q15
TV subscribers (000)	3,779	3,763	3,796	3,750	3,760	3,726
DVR subscribers (000)	*1,280*					
TiVo subscribers (000)		*435*	*1,332*	*2,000*	*2,500*	*3,000*
Broadband subs (000)	4,011	4,103	4,272	4,376	4,537	4,626
Telephony subs (000)	4,162	4,133	4,179	4,136	4,217	4,254
Double-play subs (000)	1,103	1,070	20.5%	18.5%	17.6%	18.1%
Triple-play subs (000)	3,024	3,062	64.9%	65.7%	65.9%	65.5%
Quad-play subs (000)				16.3%	17.0%	17.2%
Cable RGUs (000)	11,952	11,999	12,247	12,262	12,514	12,606
Cable customers (000)	4,800	4,806	4,894	4,909	5,017	5,060
Cable products per customer	2.49	2.50	2.50	2.50	2.49	2.49
Monthly ARPU* (£)	£47.51	£47.85	£48.87	£48.21	£49.36	£49.77
***For final quarter of year. Across TV, broadband and telephony**						
Source: Virgin Media						

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UK Digital TV Data

BT TV installed base (000)

Dec-10	545
Dec-11	679
Dec-12	770
Dec-13	956
Dec-14	1,090
Sep-15	1,300

Source: BT

TalkTalk operating data (000)

	Broadband subs	**TV subs**
Dec-12	3,840	80
Dec-13	4,035	732
Dec-14	4,236	1,332
Sep-15	4,097	1,439

Source: TalkTalk

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Sweden digital TV data

Gross TV subscriptions by platform (000)

	2010	2011	2012	2013	2014	1H15
Cable	2,362	2,356	2,414	2,386	2,277	2,266
Of which digital	*993*	*1,029*	*1,000*	*913*	*751*	*727*
Of which analog	*1,369*	*1,327*	*1,414*	*1,475*	*1,526*	*1,539*
Pay DTT	636	607	594	578	565	547
Digital satellite	652	648	642	636	628	617
IPTV	460	540	652	742	867	910
Of which DSL	*269*	*280*	*284*	*277*	*271*	*255*
Of which fiber	*190*	*260*	*368*	*465*	*596*	*655*
SMATV	287	269	272	251	220	209
Net total	**4,397**	**4,421**	**4,574**	**4,594**	**4,558**	**4,548**
Gross total	**5,135**	**5,192**	**5,297**	**5,266**	**5,214**	**5,197**
Digital TV subs	2,741	2,824	2,888	2,869	2,811	2,801
Double-play TV/telephony	19	20	17	15	14	13
Double-play TV/broadband	66	86	103	125	171	158
Triple-play with TV	520	607	634	615	603	571
Quad-play	8	16	16	13	14	13
Source: PTS						

Share of pay TV subscribers by operator (%)

	2010	2011	2012	2013	2014	1H15
Com Hem	40.1	39.4	38.4	38.3	38.0	37.9
Telenor/CD	12.6	12.4	13.0	13.4	18.3	17.5
Telia Sonera	10.2	11.7	12.7	14.1	15.5	15.8
Boxer	14.5	13.7	13.0	12.6	12.5	12.0
Viasat	7.6	7.7	7.3	7.2	7.0	7.7
Tele 2	6.2	6.1	6.6	5.3	-	-
SMATV	6.5	6.1	6.0	5.5	4.9	4.6
Other	2.3	2.8	2.9	3.5	3.9	4.5
Source: PTS						

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Sweden digital TV data

Com Hem operational data (000)

	2010	2011	2012	2013	2014	Sep-15
Connected households	1,759	1,739	1,749	1,817	1,876	1,942
Digital TV subs	620	658	612	597	618	631
Of which Tivo				*38*	*164*	*213*
Broadband subs	537	551	543	558	612	648
Telephony subs	371	376	348	327	337	331
Customers	841	861	828	830	876	903
RGUs	1,528	1,585	1,502	1,482	1,566	1,610
Triple-play subs	273	292	264	236		
Double-play %			*17*	*20*		
Triple-play %			*32*	*28*		
Digital TV ARPU (SEK)	213	225	234	233		
Blended ARPU (SEK)	340	357	363	356	361	363

Source: Com Hem

Viasat Nordic pay TV operations (000)

	2010	2011	2012	2013	2014	3Q15
Denmark	*106*	*104*	*98*	*92*	*86*	*83*
Finland	*46*	*45*	*42*	*40*	*36*	*33*
Norway	*159*	*153*	*131*	*118*	*111*	*106*
Sweden	*352*	*336*	*321*	*309*	*293*	*281*
Premium satellite TV subs	663	638	592	559	526	503
of which ViasatPlus	*158*	*188*	*192*			
of which multiroom	*235*	*250*	*250*	*235*		
of which HD	*210*	*297*	*341*	*358*		
Basic satellite TV subs	43	38	46	40	33	19
Wholesale cable and IPTV subs	394	421	427	418	456	469
Annualized ARPU (SEK)	4,555	4,791	4,988	5,075	5,254	5,257

Source: Modern Times Group. Country by country estimates by Digital TV Research

Canal Digital subscribers by country (000)

	2011	2012	2013	2014	3Q15
Norway	499	489	481	468	460
Sweden	310	307	308	310	309
Finland	49	50	52	53	54
Denmark	108	98	88	81	77
Total	**965**	**945**	**929**	**912**	**900**
ARPU (NOK)		354	373	377	390

Source: Canal Digital

Sweden digital TV data

Teliasonera subscriber growth (000)	2010	2011	2012	2013	2014	3Q15
Sweden broadband	1,129	1,149	1,175	1,208	1,275	1,296
Sweden TV	450	515	580	641	697	713
Sweden TV ARPU SEK			156	159	161	170
Finland broadband	476	491	501	532	561	529
Finland TV	218	355	403	436	481	491
Finland TV ARPU €			8.7	8.9	8.8	8.9
Norway broadband	195	188	184	0	0	0
Norway TV	6	7	12	0	0	0
Denmark broadband	67	80	87	99	114	129
Denmark TV	5	10	14	18	20	26
Denmark TV ARPU DKK			322	345	392	357

Source: Teliasonera

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Revenues for the main European cable operators (€ million)						
Rank	Company	2010	2011	2012	2013	2014
1	Liberty Global Europe plc (1)	3,326.9	3,161.4	3,609.7	4,310.4	4,931.6
2	Numericable-SFR (2)	1,274.6	1,350.2	1,305.6	1,319.6	2,170.0
3	Kabel Deutschland (cons.) (3)	1,611.2	1,711.8	1,842.5	1,911.3	2,021.0
4	Grupo Corporativo ONO (4)	1,471.7	1,485.0	1,573.0	1,598.0	n.a.
5	Ziggo N.V. (5)	1,375.7	1,478.2	1,536.9	1,564.8	n.a.
6	NOS SGPS (6)	785.8	757.9	766.6	924.8	1,323.3
7	Elisa	1,174.9	1,366.3	1,380.3	1,311.0	1,317.1
8	Publifin (cons.) (7)	554.9	653.1	743.9	808.6	919.4
9	DNA Oy (cons.)	694.2	731.4	771.6	768.8	833.5
10	TDC	n.a.	n.a.	n.a.	554.9	568.0
11	RCS&RDS S.A.	456.6	518.6	520.0	509.7	566.7
12	Rostelecom	n.a.	n.a.	n.a.	282.0	287.4
13	Get AS (8)	209.9	232.9	275.1	266.8	287.1
14	Telia Stofa	146.7	150.9	180.0	189.9	238.2
15	Com Hem	n.a.	n.a.	n.a.	197.9	190.9
16	Blizoo Media	33.4	51.1	48.5	49.0	47.2
17	Dansk Kabel TV A/S	76.9	78.6	72.9	41.3	50.6

(1) The accounts of Liberty Global Europe plc are published in USD. The total revenues include operations in Chile.

(2) In June 2014, Numericable Group merged with SFR. In December 2014 Numericable-Fr acquired Virgin Mobile

(3) Kabel Deutschland was acquired by Vodafone with the deal approved in December 2013 and finalised on 29 January 2014.

(4) ONO was acquired by Vodafone in July 2014.

(5) In January 2014 Liberty Global has announced the takeover of Ziggo N.V. for approximately EUR 10 billions.

(6) After the merger with Optimus in 2013, Zon Multimedia was rebranded NOS SGPS in 2014. "Telco" revenues only.

(7) Formerly Tecteo Group.

Acquired by TDC in 2014.

Source: European Audiovisual Observatory

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The 50 leading European television groups by revenues (€ million)							
Rank	**Company**	**Country**	**2010**	**2011**	**2012**	**2013**	**2014**
1	Sky [(1)]	GB	7,581	8,073	8,780	9,144	13,119
2	ARD	DE	6,450	6,375	6,353	6,427	6,942
3	BBC (Group)	GB	5,820	5,861	6,292	5,965	5,961
4	RTL Group	LU	5,543	5,772	5,998	5,824	5,808
5	Groupe Canal Plus (Vivendi)	FR	4,712	4,857	5,013	5,311	5,456
6	Liberty Global [(2)]	US	3,327	3,161	3,610	4,310	4,932
7	Gruppo Mediaset	IT	4,293	4,250	3,721	3,415	3,414
8	ITV plc	GB	2,200	2,466	2,559	2,853	3,216
9	France Télévisions	FR	3,137	3,126	3,153	3,054	3,018
10	ProSiebenSat.1 Media SE [(3)]	DE	3,012	2,756	2,969	2,605	2,876
11	RAI	IT	2,821	2,825	2,625	2,562	2,595
12	ZDF	DE	2,058	2,057	2,033	2,066	2,254
13	TF1 Group	FR	2,827	2,438	2,695	2,086	2,096
14	Modern Times Group	SE	1,460	1,512	1,554	1,595	1,731
15	Ziggo N.V. [(4)]	NL	1,376	1,478	1,537	1,565	n.a.
16	Vodafone ONO SA	ES	1,472	1,485	1,573	1,598	1,449
17	Prisa [(5)]	ES	1,281	1,229	1,251	1,511	1,408
18	SSR SRG	CH	1,170	1,335	1,356	1,312	1,359
19	Numericable-SFR [(6)]	FR	1,275	1,350	1,306	1,320	n.a.
20	Elisa	FI	1,175	1,366	1,380	1,311	1,317
21	Kabel Deutschland [(7)]	DE	1,611	1,712	1,843	1,911	1,173
22	Channel 4	GB	1,094	1,124	1,106	1,084	1,165
23	ORF	AT	971	992	1,002	1,008	1,014
24	Publifin [(8)]	BE	555	653	744	809	919
25	RTVE	ES	1,149	1,155	928	856	859
26	NPO	NL	857	856	865	834	855
27	DNA Oy	FI	694	731	772	769	834
28	Atresmedia	ES	657	634	592	678	734
29	QVC Deutschland (est.)	DE	721	825	778	774	731
30	Cyfrowy Polsat [(9)]	PL	374	535	679	701	n.a.
31	NRK	NO	607	635	691	683	653
32	Home Shopping Europe (e.)	DE	439	470	551	550	600
33	Discovery Comms Euro	US	425	452	479	522	580
34	Danmarks Radio	DK	518	519	532	561	579
35	TDC [(10)]	DK	n.a.	n.a.	n.a.	555	568
36	RCS & RDS SA	RO	457	519	520	510	567
37	TRT	TR	632	567	649	621	564
38	QVC Ltd	GB	454	467	483	500	550
39	Central European Media Ent	BM	551	668	585	502	513
40	Sveriges Television AB	SE	436	462	505	505	505

January 2016

The 50 leading European television groups by revenues (€ million)							
Rank	**Company**	**Country**	**2010**	**2011**	**2012**	**2013**	**2014**
41	YLE	FI	420	433	456	469	476
42	VGTRK	RU	495	587	645	692	467
43	VRT	BE	452	420	446	449	454
44	TV4 AB	SE	324	398	450	486	451
45	Pervyi Kanal	RU	601	693	726	655	441
46	ARTE	FR	341	361	378	408	404
47	TV2 AS	NO	306	366	440	392	391
48	PTH Group	PL	629	443	387	374	381
49	Telewizja Polska S.A.	PL	453	384	349	362	366
50	TVN S.A.	PL	421	859	353	357	350

(1) Year ended June n+1. Takeover of Sky Italia and Sky Deutschland in 2014.

(2) Includes video revenues of cable systems.

(3) The conversion of ProSiebenSat.1 Media AG into a European Stock Corporation (Societas Europaea/SE) was concluded on 07/07/2015.

(4) Acquired by Liberty Global in 2014.

(5) The remaining shares of Canal+ Spain held by PRISA were sold to Telefonica in 2015.

(6) Merger between SFR and Numericable in 2014.

(7) Acquired by Vodafone in 2013.

(8) Formerly Tecteo.

(9) Details of TV revenus not disclosed anymore following the acquisition of Polkomtel.

(10) Includes video revenues of cable systems.

Source: European Audiovisual Observatory

digital TV research

TV advertising expenditure in the European Union (€ million)							
Country	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**	**14/13**
Austria	602.8	647.5	698.6	749.1	819.9	907.6	10.7%
Belgium	910.1	990.0	974.1	925.7	905.0	899.2	-0.6%
Bulgaria	239.6	240.0	260.3	297.2	351.1	369.7	5.3%
Croatia	118.8	107.6	105.9	96.2	93.8	96.4	2.8%
Cyprus	62.6	59.1	47.5	35.5	28.4	32.7	15.1%
Czech	357.1	358.9	376.3	367.9	328.7	322.6	-1.9%
Denmark	276.5	302.9	337.8	315.7	296.5	291.1	-1.8%
Estonia	7.1	21.1	22.9	22.3	24.1	25.0	3.7%
Finland	263.6	295.6	314.4	311.2	305.8	294.4	-3.7%
France	3,449.8	3,836.7	3,898.0	3,720.8	3,589.2	3,592.5	0.1%
Germany	4,003.6	4,349.1	4,379.1	4,441.5	4,537.6	4,718.1	4.0%
Greece	679.0	524.8	509.7	422.5	514.3	580.0	12.8%
Hungary	234.6	198.0	214.1	200.7	233.1	298.5	28.1%
Ireland	277.0	283.2	293.2	274.9	269.8	286.5	6.2%
Italy	4,358.9	4,774.7	4,624.3	3,917.5	3,526.8	3,510.1	-0.5%
Latvia	29.3	29.1	31.0	32.0	32.5	33.2	2.2%
Lithuania	41.8	44.2	46.8	47.5	47.1	46.0	-2.3%
Luxembourg	15.0	15.0	14.8	13.9	15.5	12.6	-19%
Malta	7.1	7.5	7.4	7.1	7.0	9.5	35.7%
Netherlands	791.5	875.4	914.8	864.5	836.0	864.4	3.4%
Poland	655.6	929.4	965.9	884.9	1,010.1	973.6	-3.6%
Portugal	1,301.4	1,405.1	1,382.0	1,265.8	1,462.1	1,701.2	16.4%
Romania	227.1	250.2	213.6	175.8	165.0	185.2	12.2%
Slovakia	495.5	510.9	604.0	695.8	780.8	826.1	5.8%
Slovenia	157.1	60.9	72.5	76.3	108.0	115.9	7.3%
Spain	2,377.8	2,471.9	2,237.2	1,815.3	1,703.4	1,890.4	11.0%
Sweden	502.2	598.2	693.8	748.1	755.8	697.1	-7.8%
UK	4,163.9	5,004.2	5,044.1	5,438.4	5,287.2	5,836.0	10.4%
EUR 28	**26,606.4**	**29,191.2**	**29,284.1**	**28,164.1**	**28,034.6**	**29,415.6**	**4.9%**

Source: Warc and IP Key Facts (for Luxembourg) / European Audiovisual Observatory

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