



4 EU Audiovisual Markets

FACTS & FIGURES

FRANCESCA MEDOLAGO ALBANI – ANICA – 16TH SEPTEMBER 2014

Summary

- ▶ Sharing information about the 4 largest EU AV markets: France, Germany, Italy, UK
- ▶ A comparative overview focused on:
 - ▶ PSB economics & workforce
 - ▶ Advertising Market
 - ▶ Public support to film & AV industry
 - ▶ Film market (Theatrical – Gross Box Office)
 - ▶ Broadband penetration
- ▶ Various sources (intelligence activity)
- ▶ No free access to comparative data

PSB economics & workforce

											
	ITA	UK	FRA			GER				SPA	
Canone (mln)	€ 1.748	£ 3.656	€ 2.103	€ 569	€ 123	€ 409	€ 5.375	€ 1.731	€ 192	-	-
Sovvenzioni statali (mln)	€ 33	£ 270	€ 362	-	€ 272	-	€ 67	€ 6	-	€ 291	€ 1.110
Pubblicità	€ 745	-	€ 424	€ 41	€ 9	-	€ 134	€ 146	-	-	€ 5
Altri ricavi commerciali (mln)	€ 261	£ 1.176	€ 193	€ 23	€ 12	€ 12	€ 799	€ 174	€ 26	€ 11	€ 39
TOTALE RICAVI (mln)	€ 2.787	£ 5.102	€ 3.081	€ 633	€ 379*	€ 421	€ 6.375	€ 2.057	€ 303	€ 303	€ 1.154
Importo canone ordinario (anno 2013)	€ 113,5 (2013)	£ 145,5 (2013)	€ 131 (2013)			€ 215,8				-	
Stima tasso di evasione (2011/2012)	27%	5%	1%			5%				-	
Dipendenti (media o fine anno)	13.158	21.282	~ 9.000	~ 4.600	1.664	424	~ 21.700	~ 3.600	~ 690	1.517	6.517
			~ 15.500			~ 27.700					
Ascolti TV nazionali (intera giornata)	38,6%	31,9%	28,6%	-	-	2,0% (FR) 0,9% (DE)	12,1%	14,8%	-	-	16,%

+3,4% ▲

* Ritorno agli ascolti dei 6 canali in comune tra ZDF e ARD.

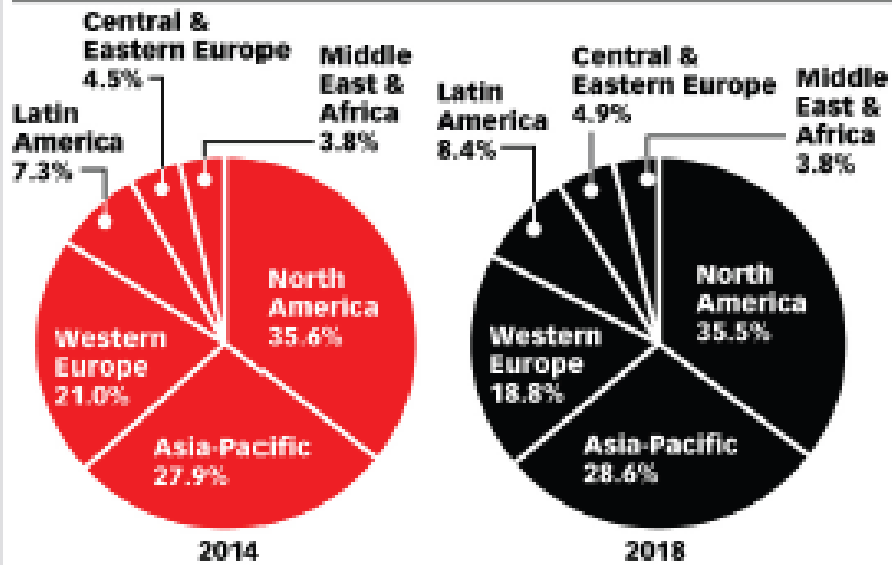
Advertising market (billion \$)

	2013	2014	%	2015	2016	2017	2018	%
Germany	26,93	27,33	24%	27,71	27,99	28,35	28,64	23%
UK	22,15	23,62	21%	24,71	25,75	26,72	27,62	22%
France	15,24	15,39	13%	15,56	15,70	15,88	16,04	13%
Italy	11,50	11,48	10%	11,69	11,95	12,22	12,46	10%
Others	36,21	36,77	32%	37,54	38,49	39,46	40,55	32%
Western Europe (Total)	112,03	114,59	100%	117,21	119,88	122,63	125,31	100%

Advertising spending forecast

Total Media Ad Spending Share Worldwide, by Region, 2014 & 2018

% of total



Note: includes digital (desktop/laptop and mobile), directories, magazines, newspapers, outdoors, radio and TV; numbers may not add up to 100% due to rounding

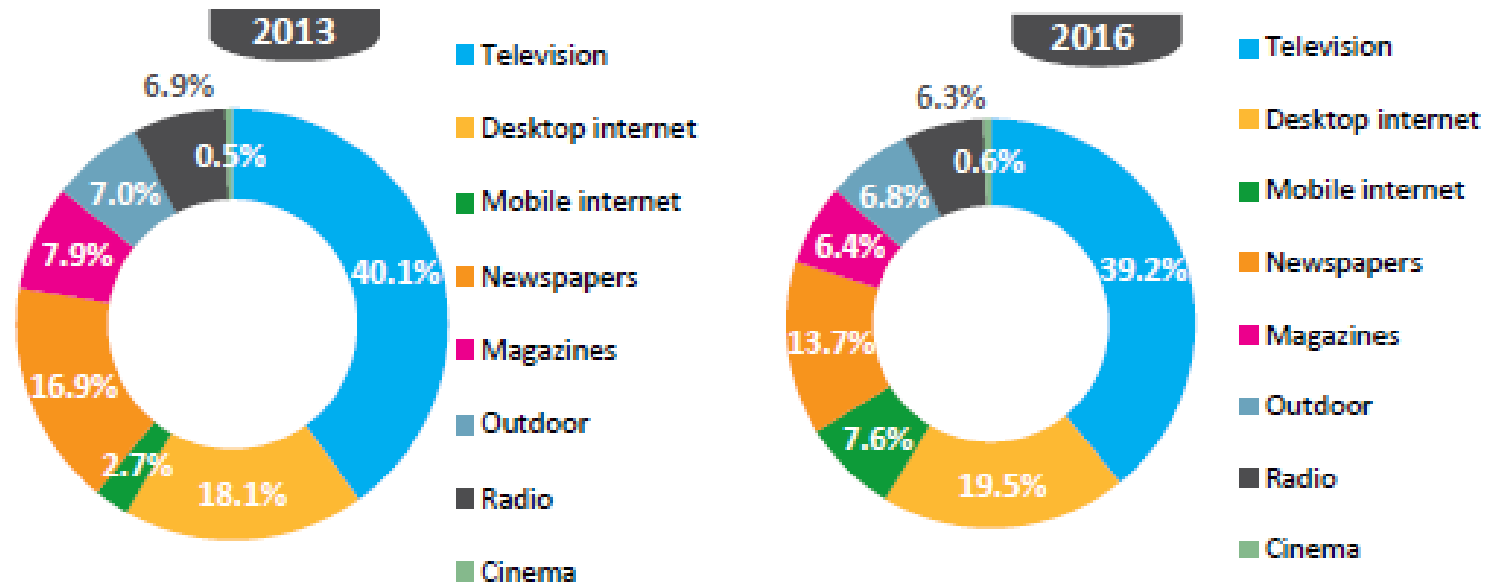
Source: eMarketer, Sep 2014

178439

www.eMarketer.com

Source: eMarketer, Sep 2014

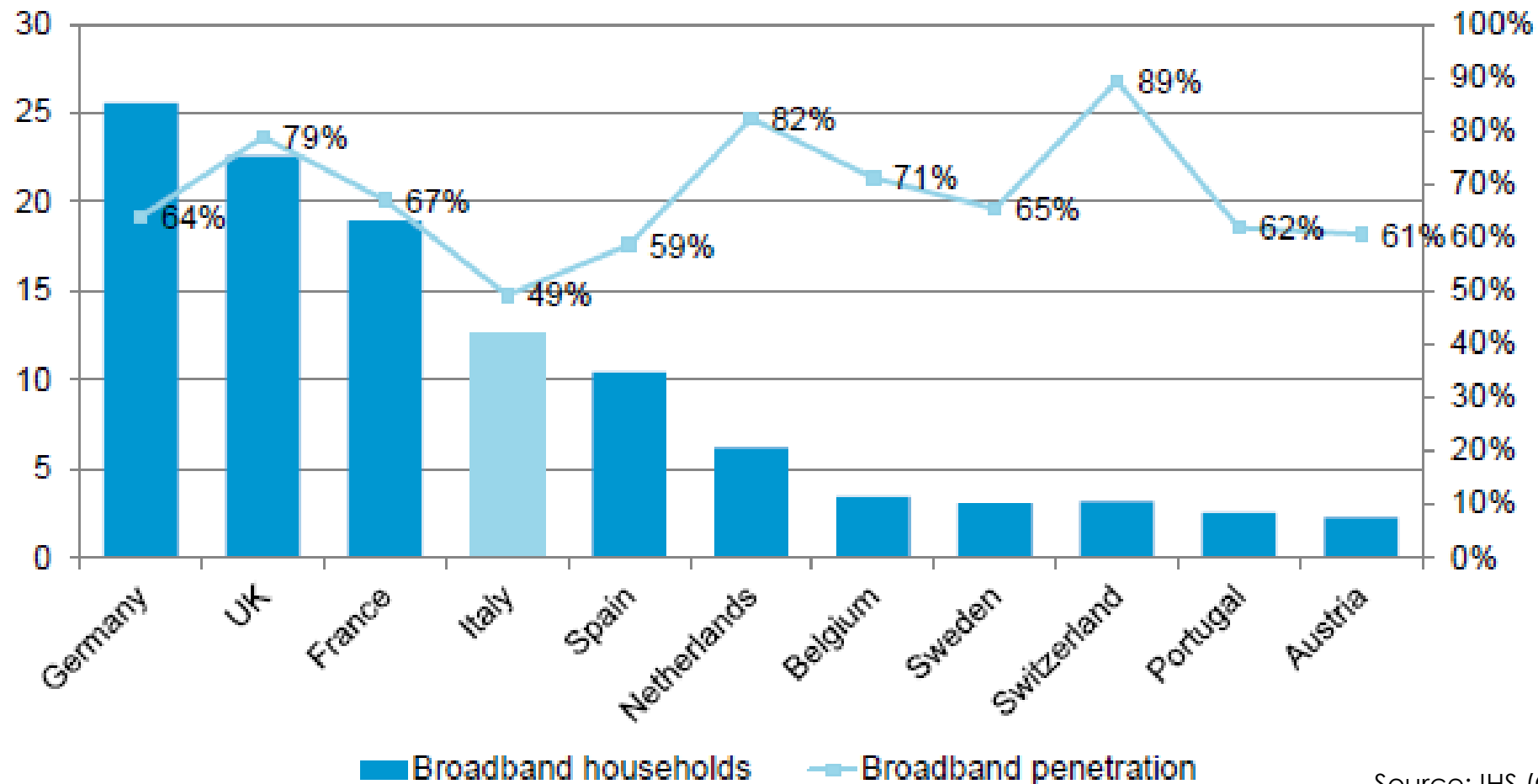
Share of global adspend by medium (%)



Source: Zenith Optimedia, Apr 2014

Broadband penetration in EU

2014: Broadband households in Western Europe



Public funding for Film & AV works

* Excluding investments by BBC, C4, MEDIA e UE, including Regional Agencies and other Public Bodies (FO, UKTI, OfCOM); Fiscal Year 2012/2013; Exchange rate £/€ 1,17

** Year 2011

Total amount (direct + indirect aids)	2013 (M€)	Source
France	784	CNC
UK*	383	BFI
Germany**	344	EAO
Italy	187	DGC/MiBACT

Theatrical market

Top 10 markets worldwide - 2013

	Gross Box Office (US\$ billion)
1 USA&Canada	10,90
2 China	3,54
3 Japan	1,99
4 UK	1,69
5 France	1,66
6 India	1,59
7 South Korea	1,42
8 Germany	1,36
9 Russian Federation	1,34
10 Australia	1,06

Top 10 markets worldwide - 2013

	Admissions (million)
1 India	2.697
2 USA&Canada	1.340
3 China	612
4 Mexico	248
5 South Korea	213
6 France	194
7 Russian Federation	177
8 UK	166
9 Japan	156
10 Brazil	150

Top 5 EU markets - 2013

		GBO (US\$ million)	ADM (million)
1	France	1.660	193,6
2	UK	1.690	165,5
3	Germany	1.360	129,7
4	Italy	858	105,7
5	Spain	669	78,2



THANK YOU!

▶ f.medolago@anica.it