



2012, or the multiple TV experience

A Panorama of Worldwide TV Consumption

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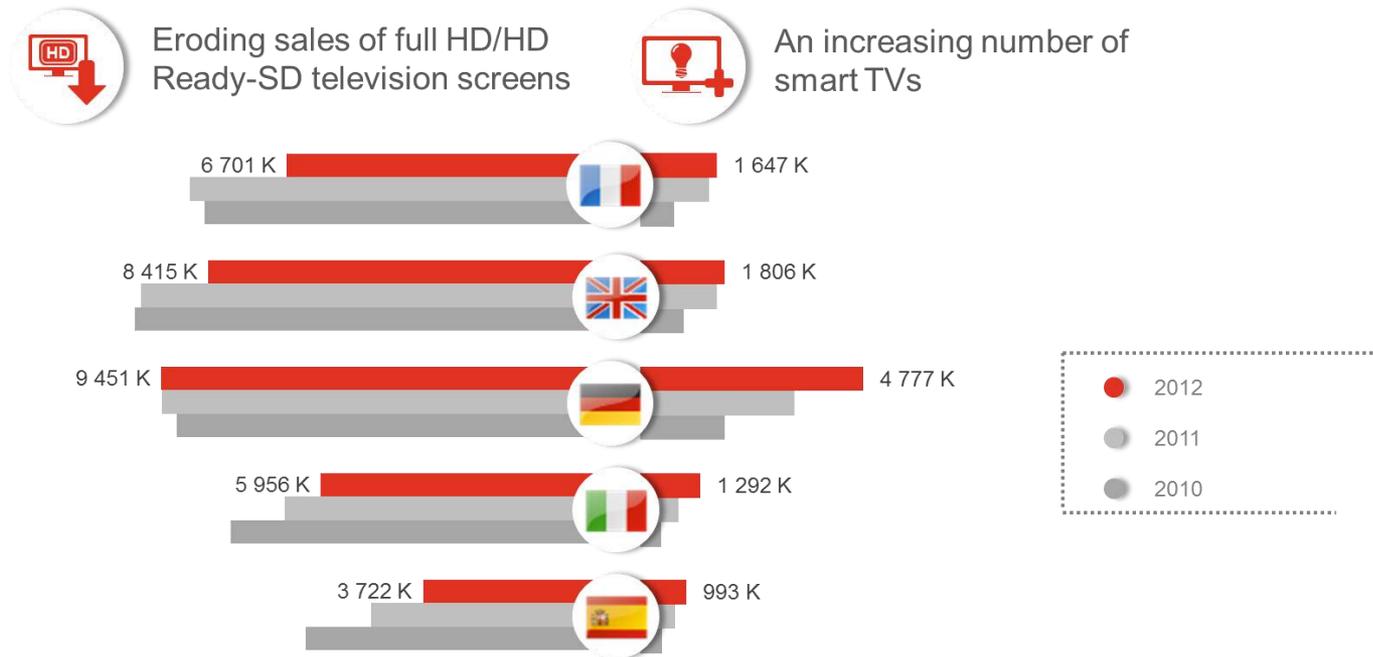
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Decrease in sales, but televisions grow smarter



Households around the world are increasingly becoming better equipped, owning TV sets and other technologies that encourage TV consumption.

Although the sales of traditional television sets are on the decline, households still consume television and are inclined towards the newest technological devices.



Source: Eurodata TV Worldwide / GfK – All rights reserved

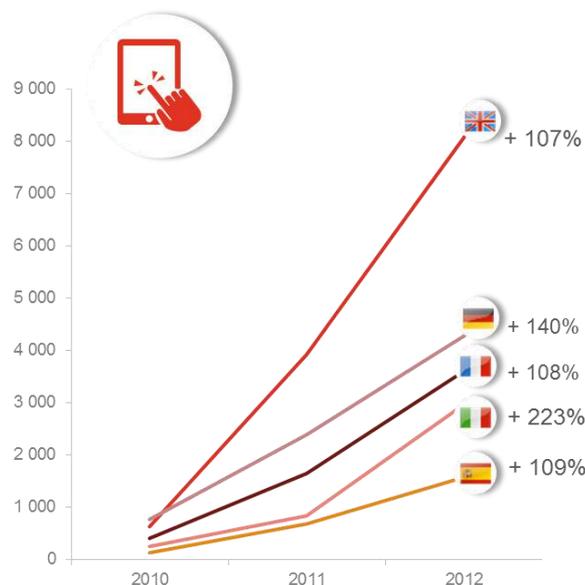
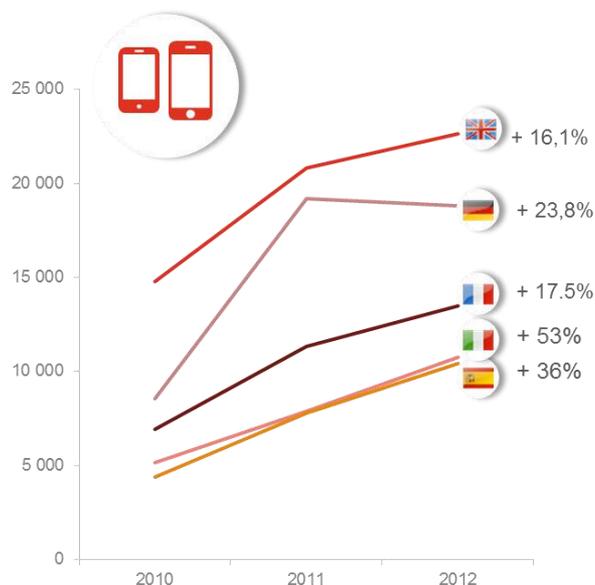
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The number of companion screens explodes over one year...

In the meantime, sales of second screens are exploding throughout the world. According to GfK, more than 20 million smartphones were sold in the United Kingdom in 2012, a 53% rise compared to 2010.

In Germany, after a huge increase from 2010 to 2011, almost 19 million units were sold in 2012. In France, Italy and Spain, the sales regularly increased with a rise close to 100% from 2010 to 2012.

Still in 2012, the number of tablets sold in the United Kingdom was 13 times higher than in 2010 with more than 8 million units. In Germany and France this figure stands at about 4 million.



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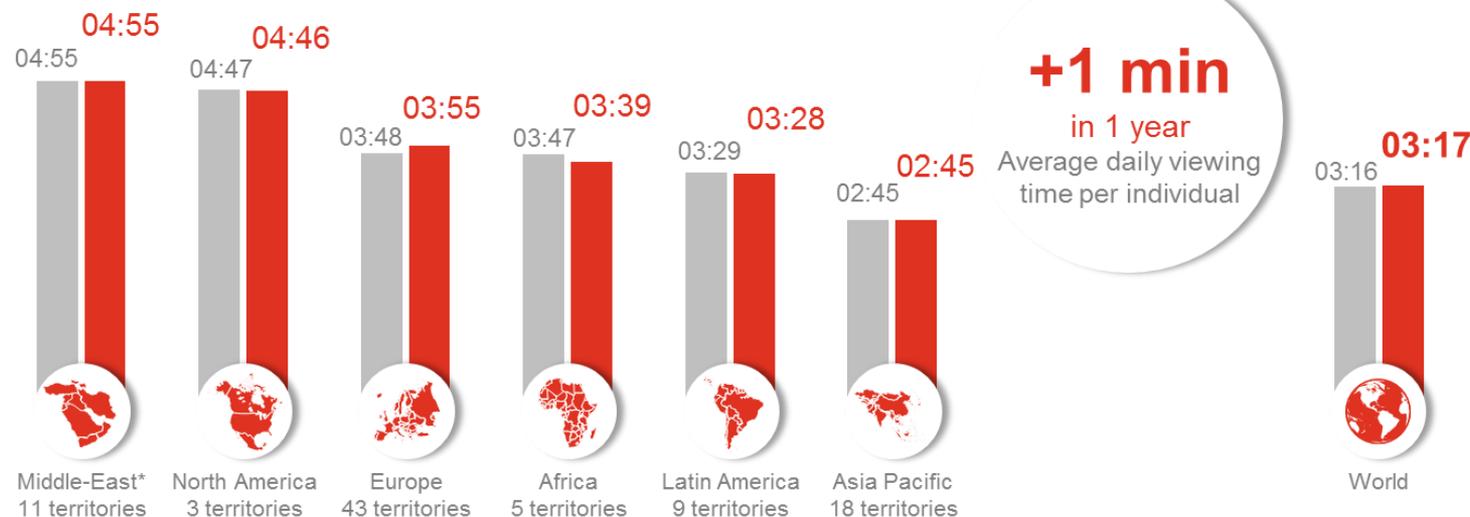
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... but television is still growing

In 2012, TV viewers around the world watched an average 3 hours 17 minutes of television a day, one minute more than in 2011.

Calculated on a 3.3 billion individuals universe and over 107 territories, this performance confirms the status of television as the number one pastime in the world.

World daily viewing time in 2012 : **3h17**

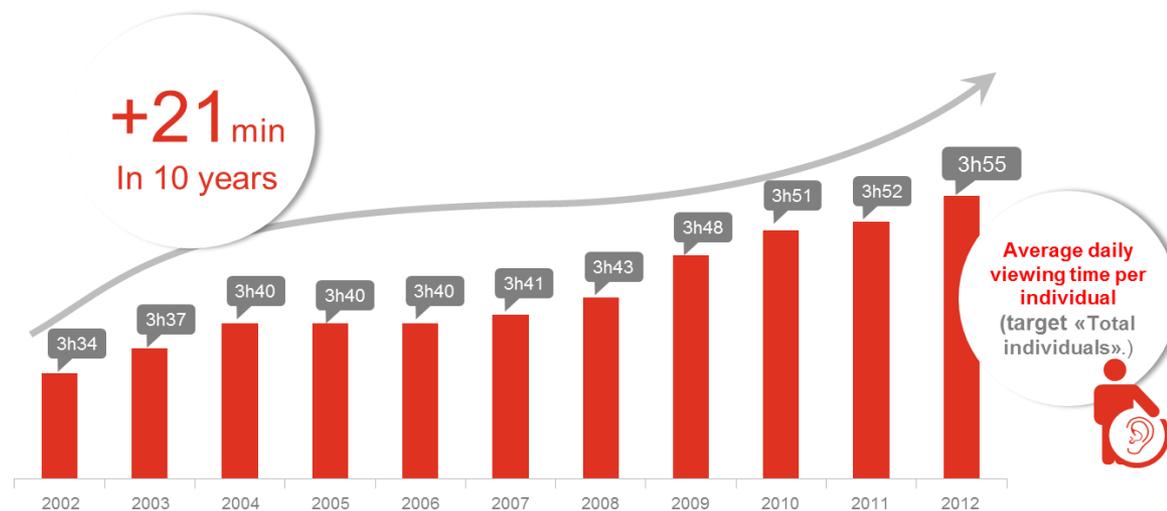


* In the Middle-East, only Lebanon, Israel and the United Arab Emirates have people meter systems.

Growth becomes part of the times

Eurodata TV Mega Panel*

This growth has become part of the times, with a 21 minute increase in ten years on a constant 50 territory scope from 3h34 in 2002 to 3h55 in 2012, and is also confirmed in mature markets with significant increases reported in several European and Asian countries in 2012.



The averages are weighted according to the size of the universe «Total individuals».

* Mega Panel Eurodata TV (50 territories): Austria, North Belgium, South Belgium, Bosnia-Herzegovina, Bulgaria, Canada, Croatia, Cyprus, Czech Republic, Denmark, Finland, France, Germany, Greece, Hong Kong, Hungary, Indonesia, Ireland, Israel, Italy, Japan, South Korea, Lebanon, Malaysia, Mexico, Holland, New Zealand, Norway, Philippines, Poland, Portugal, Romania, Russia, Singapore, Slovakia, Slovenia, South Africa, Spain, Sweden, Switzerland (French, German, Italian) Taiwan, Thailand, Turkey, Ukraine, UK, US, Venezuela, Vietnam, (2010 & 2011 Singapore excluded)

While in France and Italy, the average daily viewing time respectively increased by 3 and 2 minutes, South Korea and Malaysia also registered a consequent growth in 2012. In South Korea, the average daily viewing time reached 3 hours and 21 minutes in 2012, a spectacular increase of 22 minutes compared to 2011, while Malaysia registered 3 hours and 35 minutes in 2012, up by 16 minutes, compared to the previous year.

These growths come to balance the decreasing average daily viewing time in other mature markets such as the United Kingdom and the United States that lost 1 minute between 2011 and 2012, and Germany that registered a 3 minutes decrease over the same period.

+7 minutes of daily viewing time in Europe

Europe drove this record as it was here that the strongest growth was registered, with 7 minutes more than in 2011, to reach 3 hours 55 minutes per day.

The countries that have been hardest hit by the financial crisis recorded the biggest increases. Romania is thus the European record holder with nearly 5 hours 30 mins per person per day, while viewing increased by five minutes a day in Greece (4 hours 33 mins), seven minutes in Spain (4 hours 6 mins) and two minutes in Italy (4 hours 14 mins).



Results based on consolidated audience data in Germany, France, United Kingdom and Italy (since May 2011 for Italy). Time-shifted consumption not measured in Spain. Results based on « Live » (including DVR Playback) in the USA.

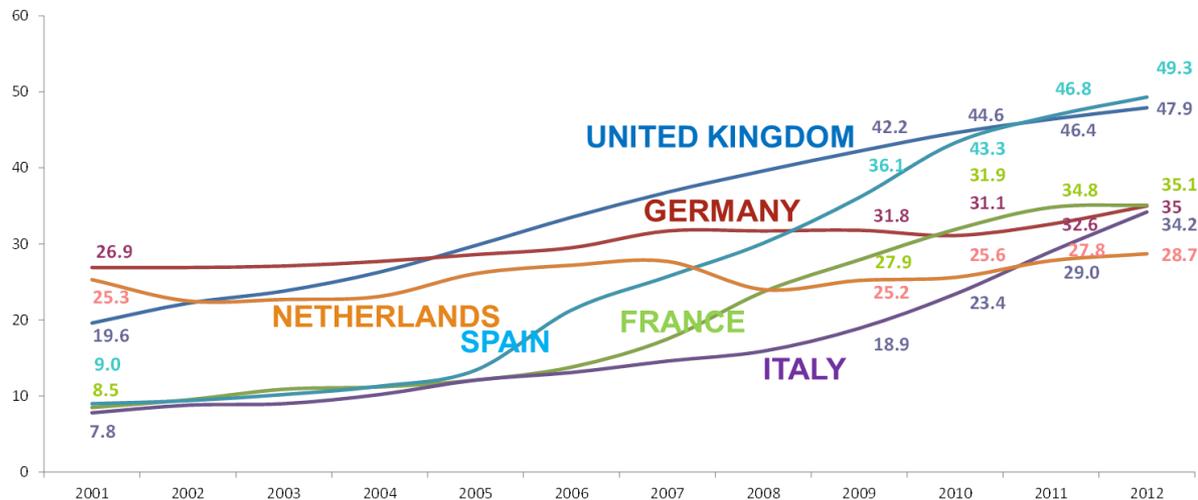
Markets increasingly fragmented

The expansion of the channel offer, reinforced by the analogue switch off, is an extra motivation for television consumption. In Spain, for example, the market share of such channels, excluding than the original analogue selection, has grown from 9% in 2001 to 49,3% in 2012.

The gain of 2,5 points audience share between 2011 and 2012 has allowed Spanish challenger channels to overall surpass that of their British counterparts in 2012, which registered 47,9% in 2012. This is nearly the same level as in the UK, where these channels already benefitted from a share of 20% in 2001.

Evolution of the audience share of the 'challengers'

(all except the historic channels*)



* Historic Leaders: **Germany** : ARD 3, ARD 1, ZDF, RTL, Sat1, Pro7 / **France** : TF1, France 2, France 3, M6, France 5/Arte, Canal+ / **Spain** : La1, La2, Tele5, Antena 3, FORTA / **Italy** : Rai Uno, Canale 5, Italia 1, Rai Due, Rai Tre, Rete 4, La Sette (La Sette replaced TMC on 24th June 2001) / **Netherlands** : Nederland 1, Nederland 2, Nederland 3, RTL4, RTL5, RTL7 (ex Yorin), SBS6, Net5, Veronica (ex V8) / **United Kingdom** (HD included where measured) : BBC1, ITV1, Channel 4, BBC2, Five.

The situation is quite different in the Netherlands and Germany. As both countries already had extended channel offers via cable or satellite, German and Dutch people have been used to a wide range of TV channels.

In the Netherlands, analogue switch off took place in 2006 but it seems historical channels have been largely successful in resisting the growth of new challengers, even if a small increase in the latter's audience share occurred in both countries between 2011 and 2012.

Young adults keep an eye on television

Although traditional television still dominates television consumption within the young adult target audience, it is growing towards developing alternative content modes of consumption that directly affect the first screen average daily viewing time.

In Germany, the United States, and the United Kingdom, young adults spent less time in front of the traditional television set. However, Southern-European young adults asserted their appetite for first screen consumption with a daily viewing time increase of 7 minutes in Spain and 26 minutes in Greece from 2010 to 2012.

Average daily viewing time per individual (2010 – 2012)



Results based on consolidated audience data in Germany, France, United Kingdom and Italy (since May 2011 for Italy). Time-shifted consumption not measured in Spain. Results based on « Live » (including DVR Playback) in the USA.

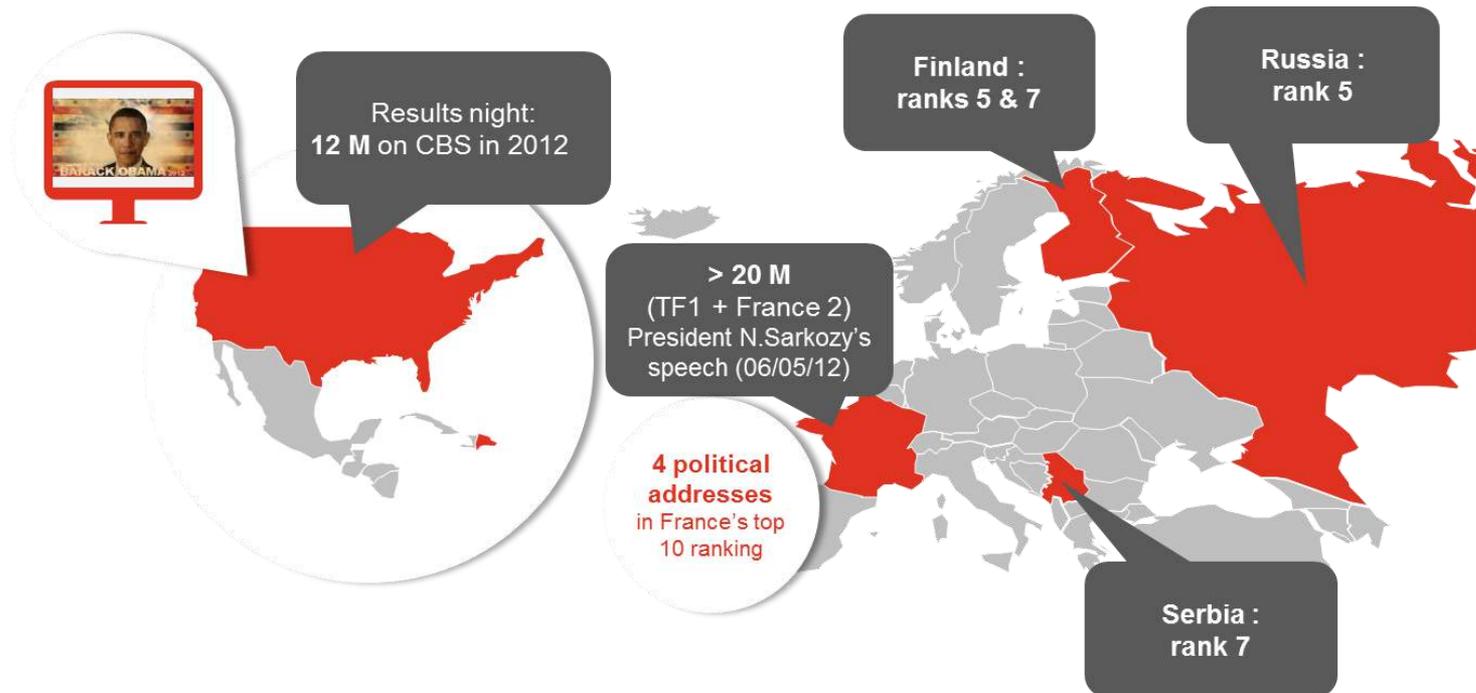
Source: Eurodata TV Worldwide / Relevant Partners – All rights reserved

Exceptional audiences for special events

Twice as many political broadcasts

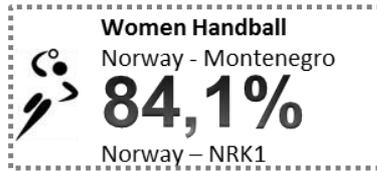
The year 2012 was uncontestedly marked by political events, supported by presidential elections, which occurred twice as frequently in the top rankings when compared to 2011.

The yearly programme rankings of France and Russia are most representative of the political wind that blew over television this past year.

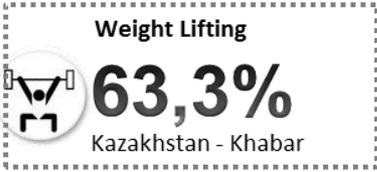


Whether global or local, sports competitions unite viewers

UEFA EURO 2012
POLAND-UKRAINE



London 2012
Olympic Games



This year, recurrent sports competitions and extreme performances set the tempo of the news and stimulated audiences throughout the world.

The UEFA European football championship positioned itself as the best performing sports broadcast in 27 territories around the world.

The opening and closing ceremonies of the London Olympic Games also broke audience records, finding a place among the top ranking programs in Europe, but also in Canada and the United States where 42.5 million viewers followed the launch of the Games on NBC.

Spectacular events set records



Felix Baumgartner / Red Bull Stratos Project



Two exceptional performances also attracted attention on a global level.

In October 2012 viewers from around the world followed live as Felix Baumgartner made his supersonic jump. The broadcast was the number one performing broadcast in Austria, the home country of the parachutist and his sponsor.



Megastunts : Highwire Niagara Falls



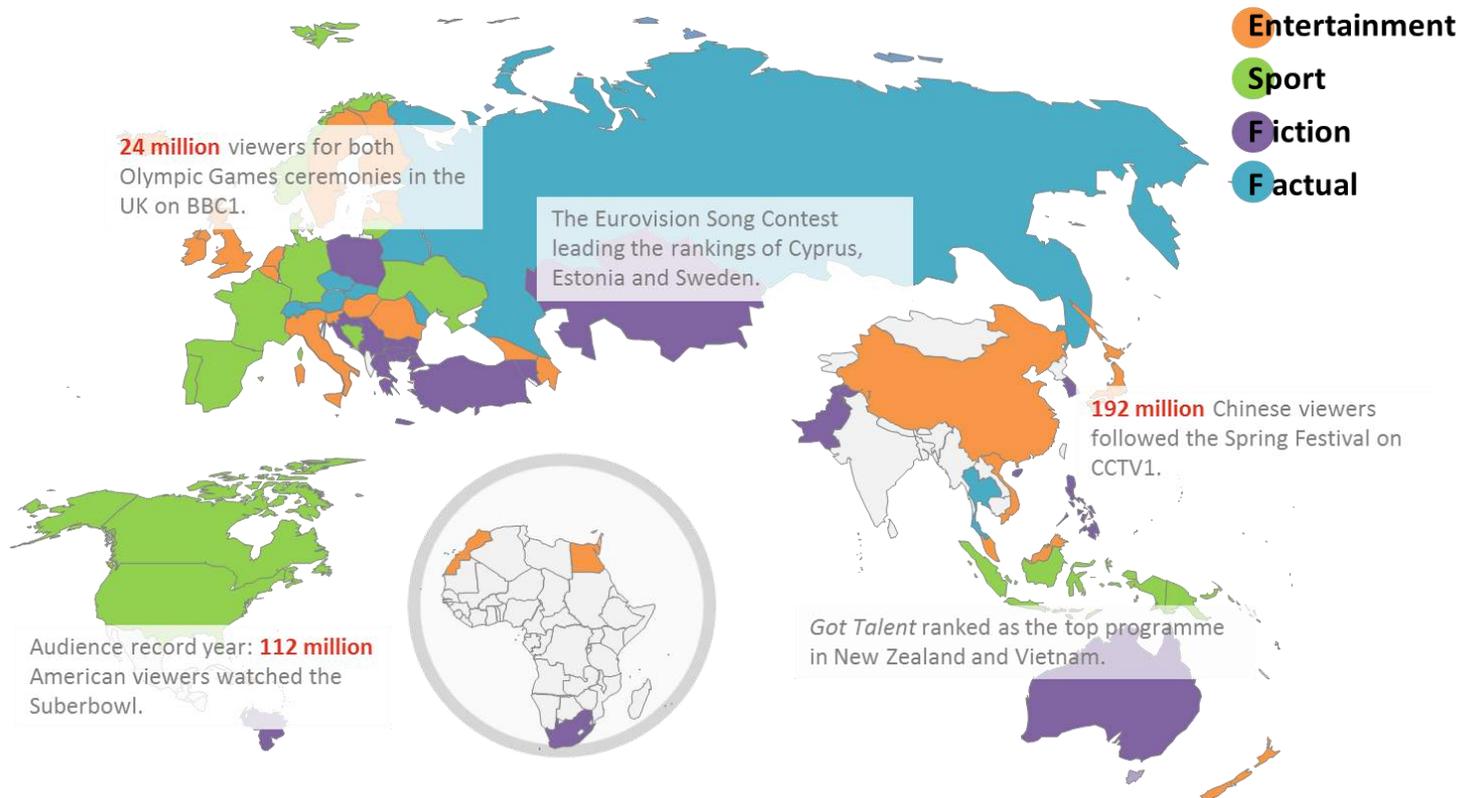
In Canada, 4 million viewers held their breath as the tightrope walker Nik Wallenda crossed the Niagara Falls. This was the sixth best audience of the year for CTV with a 34% audience share.

TV is the place to be for important moments

Top 2012 audiences by genre

Content are the uncontested drivers of TV consumption throughout the world. They are the primary motive to tune in to television or go online.

However, while internet consumption still remains largely individual, television is a collective media that gathers the largest audiences.

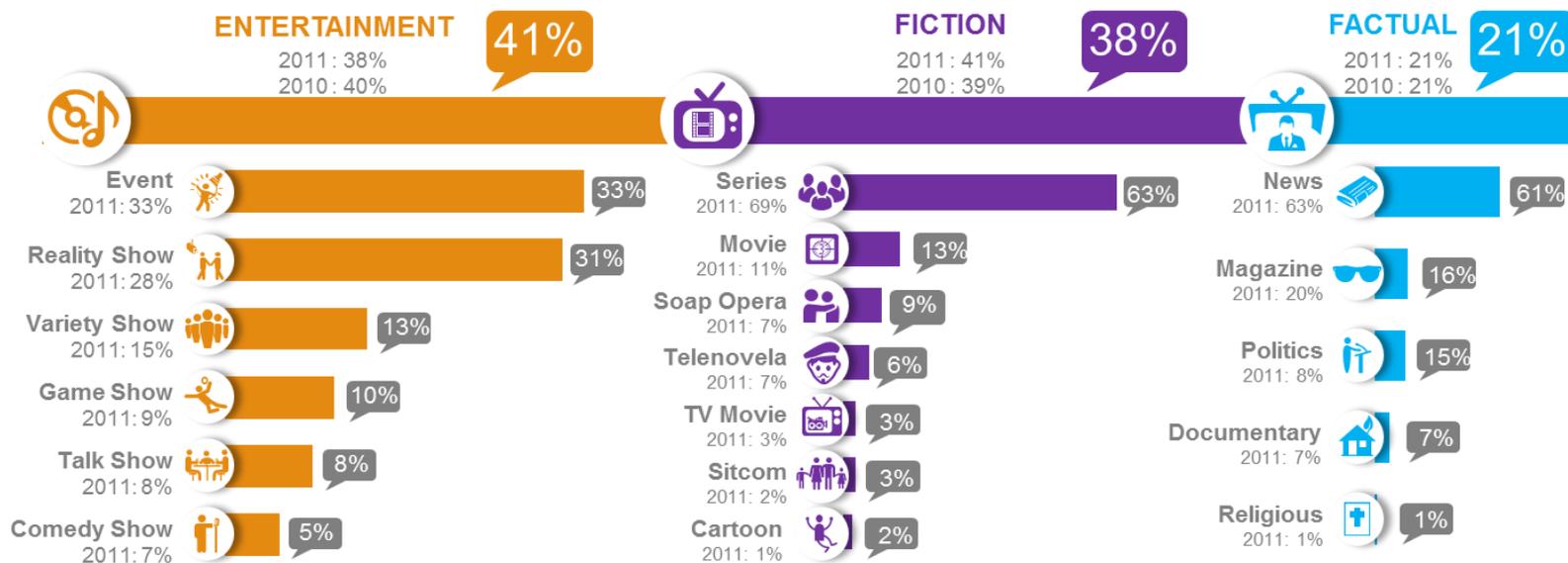


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Entertainment ahead again thanks to formats

Top 10 programmes in 2012 by genre (without sports)
(based on the number of occurrences in %) – 71 territories included in the analysis.



Adaptations of global brands into local formats still dominate the entertainment market, which leaves less space for fiction in the top rankings in the worldwide markets.

The reality television shows' great performances specifically allowed the entertainment genre to climb the international programme rankings, representing 41% of the most watched programmes versus 38% for fiction in 2012.

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

Rich content and dominant brands

Dominant entertainment brands and 'Feel Good TV'

The enthusiasm of viewers around the world for talent quests, especially concerning musical talent, shows no sign of waning. The most emblematic format of 2012 is without doubt *The Voice*, which experience a surge in popularity, appearing in the top rankings of 16 territories, against three in 2011.



Talpa Distribution



FremantleMedia

Likewise, the *Eurovision Song Contest* appears 23 times in the international rankings, against 18 last year. Other talent shows also perform well such as the formats *Got Talent* and the culinary contest *Masterchef*.



BBC Worldwide



Shine International

What about tomorrow's world brands ?



Simon Cowell



FremantleMedia



Endemol International

Series: the new explorers

Series-wise, Turkey continues its international expansion with series that are given a warm welcome in north Africa and Eastern Europe.

The Turkish soap *Fatmagül* recorded a market share of more than 60% in Bulgaria, while *Magnificent Century* is among the most popular series in Bulgaria, Croatia, Egypt, Russia, Slovakia and Ukraine.



Could India be next?

This appetite for oriental telenovelas could be fed by another territory: India. After South East Asia, the Indian influence now extends to the United Arab Emirates and Bosnia Herzegovina.

A pure Bollywood production, the soap *Uttaran* appears for the first time in the Bosnian top ranking, with more than 30% audience share.

The United Kingdom, second series exporter behind the United States

Europe is also taking on a new dimension in the international fiction market. The UK confirmed itself as the second greatest exporter of TV content behind the United States, notably thanks to its drama and police series.

For example, *Downton Abbey* has been sold in more than 100 countries, while the third season broke audience records for the channel PBS, attracting 8.2 million viewers for the final episode (overnight figures).

ITV Studios / NBC Universal Sales



+100 countries
8,2 million on PBS



N°1 Sweden, Netherlands...

10,6 million



BBC Worldwide



Europe also shines internationally

In an attempt to increase Europe's worldwide market penetration, local adaptations and international co-productions are also successfully being developed.

In Poland, the local adaptation of the Italian series *Don Matteo* ranked among the best programmes of 2012.

In Denmark, the Scandinavian co-production *Forbrydelsen*, adapted as *The Killing* in the United States, gathered close to 40% of the population and ranked as the second most watched programme of the year. Another illustration of the growing interest in thrillers from the frozen north: France and the UK are going to collaborate on an adaptation of a Nordic series *The Bridge* (*Le Tunnel*).



The Box Distribution



ZDF Enterprises



Zodiak Rights

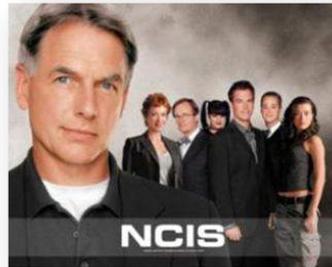
US series: the dark side of the Force

American series were less represented in international rankings in 2012 compared to 2011, their exportation is nonetheless keeping up well.

In 2012, cable network shows were particularly successful, such as *The Walking Dead* which surpassed its own audience record by attracting over 12 million viewers for its 3rd season premiere.

This illustrates a growing tendency for darker series than that of the big networks, a trend that will most certainly increase over 2013 with the rapid success of Netflix's *House of Cards* and *Hemlock Grove*.

The
procedurals,
pillars for
general series



The challengers
go darker



Social platforms and second screens redefine behaviours

Revolution of television habits with #socialTV, #2ndScreen and #multitasking



35,8% of tablet users have watched live of catch-up television programmes on a tablet within the last 12 months.

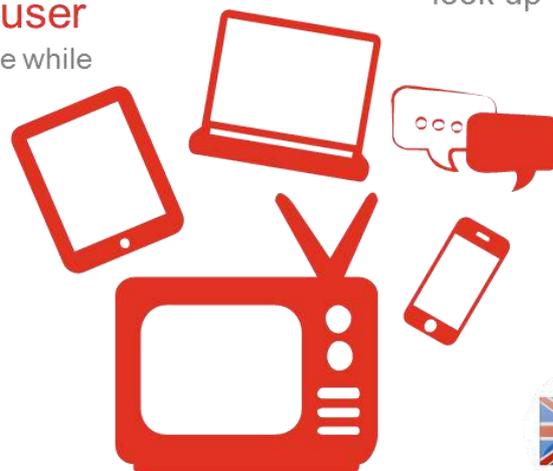


35% of tablet owners...
23% of smartphone owners...

#SocialTV : 1 on 4 web user

has already commented a TV programme while watching it.

look up for information on the programme they are currently watching via a #2ndScreen.



37% Brazilians



36% Chinese

watch television while surfing on a social network.

80% of smartphone owners...



81% of tablet owners...

73% of PC owners...

used these #2ndScreen in front of the television.

Sources:

France : Mediametrie – Global TV – Base : Total individuals 15+ (V10 : October-November 2012) : 51 113 004 individuals.
Mediametrie – Screen 360 - 2012)

UK : eDigitalResearch / IMRG (October 2012)

USA : Nielsen 2012 – The Social Media Report

Brazil & China : The rise of the digital multi-tasker, KPMG Digital Debate, KPMG International, 2013 | All figures are from YouGov plc unless otherwise stated. Metro China & Metro Brazil,

Increased average time spent watching online videos

In the context of the continuous rise in sales of smartphones and tactile tablets in 2012, viewers are now watching television differently, notably in the simultaneous use of a second screen. In the UK, 81% of tablet owners used this second screen while watching TV; a third of Brazilians and Chinese watch it while surfing on a social network; while in France one internet user in four has already commented on a programme they were watching.

Average time spent watching video players

Top 3 audience of TV channels

| Country | Average time per individual |
|-------------------------|-----------------------------|
| France | |
| TF1 / Wat | 01:39:01 |
| France Televisions | 00:41:42 |
| M6 | 01:08:45 |
| United Kingdom | |
| BBC | 02:22:36 |
| ITV.com | 01:24:42 |
| Channel 4 | 01:58:54 |
| United States | |
| ESPN Digital Network | 00:20:06 |
| Weather Channel Network | 00:07:54 |
| CNN Digital Network | 00:22:42 |

Top audience of Video portals



These evolving habits in television consumption subsequently positively impacts the time spent by web surfers on video portals.

In the United Kingdom, a spectacular increase of 3 hours and 15 minutes was registered in the monthly video viewing time over the past year, reaching 6 hours and 21 minutes per month.

Source : Mediametrie//NetRatings – Video Audience Measurement – December 2012 – All places of connection – Base : 2 years +
Source : Nielsen – Video Census – UK – January 2013 – All places of connection – Base : 2 years +
Source : Nielsen – Video Census – USA – January 2013 – All places of connection – Base : 2 years +

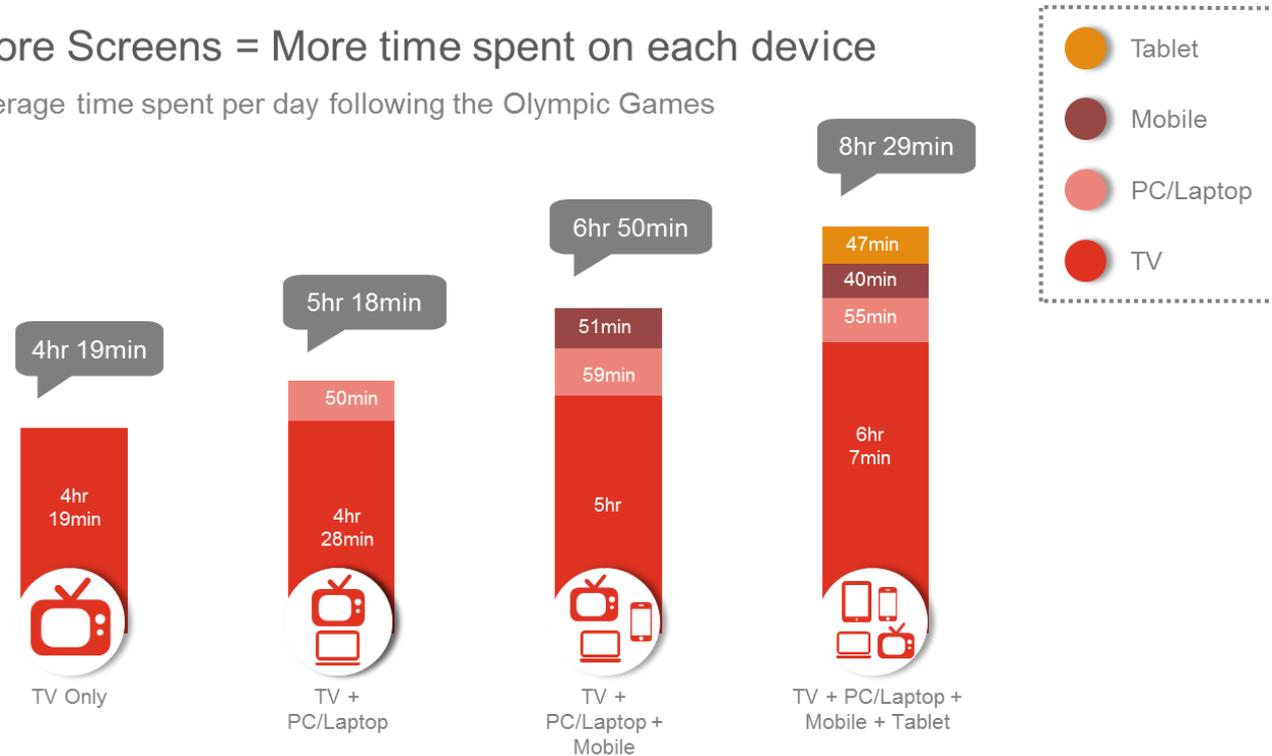
Olympics: consolidated audience among all devices twice the TV audience

Although viewers' appetite remained strong for the television broadcast of the London 2012 Olympic Games, their total content consumption significantly increases when considering all the digital devices.

A study presented by NBC Universal Research President Alan Wurtzel strongly emphasizes complementary viewing as it reveals that amongst American viewers, the average time spent per day following the two week event nearly doubled when combining the television set, computer, mobile and tablet viewing. The total average viewing time thus increased to reach a total of 8 hours 29 minutes compared to 4 hours 19 minutes for television alone.

More Screens = More time spent on each device

Average time spent per day following the Olympic Games



Source: comScore Single Source Multi-Platform Study. A18+. 7/27/12 – 8/12/12. Total Day. Screen Status Definitions: TV+PC Only = Followed the Olympics on TV and PC but not on Mobile or Tablet, TV+PC+Mobile = Followed the Olympics on TV, PC and Mobile but not on Tablet, TV+PC+Mobile+Tablet = Followed the Olympics on all 4 screens.

A richer and more social experience... ... for increasingly efficient TV

Supported by technological evolutions, television is undergoing an editorial mutation, and channels are attempting to push the TV experience beyond the broadcast.

Every day, under the hashtag #EuronewsVineOfTheDay, Euronews broadcasts the news of the day in a six second mini film on its Twitter feed.

The new Syfy series *Defiance* made its appearance on US screens, at the same time as the video game. Viewers are thus able to watch, play and interact with this new science fiction series.



Second screen & social networks: Creating content for the first screen ?

Tomorrow, the second screen could be a creator of content for the first screen. Today, several web applications allow you to mix viewers' favourite formats to create a unique show. An example is the Facebook application **Your Show** which turns the user's news feed into a personalised daily show.

In the beginning of 2012, interactive social media became a veritable part of the television experience with the creation of MTV MEDIA's third free national TV channel named **AVA**. In this project, viewers were integrated on all aspects, from content to design, to shape a collective and singular channel.

Traditional channels are also starting to produce exclusive web content. In the United Kingdom, Channel 4 launched the new TV channel **4Seven**, broadcasting programmes that have been most talked about in the media and social media spheres during seven days.



2012, or the multiple TV experience?



➤ A world record of the daily viewing time with 3h17 **(+1 min)**
Driven by a strong growth in Europe **(+7 min)**



➤ **Rich content, dominant brands, social devices and companion screens** are shaping television consumption in the world



➤ **Social, connected, synchronised** : television is reinventing itself while the digital is imposing its stamp and its rhythm

Created by Médiamétrie, **Eurodata TV Worldwide** distributes programming and audience information based on its partnership with national institutes operating people meter systems throughout the world. Today, Eurodata TV Worldwide's database includes more than 5,500 channels in 106 territories and provides an exhaustive amount of daily program information including: content, production, international distribution and the audience levels for target programs, with all data emanating directly from the relevant authorized institute based in each country around the world. This data provides a range of services which help in the decision-making process of international media professionals. For more information, please contact acallay@eurodatatv.com.

This analysis is based on the One TV Year in the World: 2013 Edition by Eurodata TV Worldwide. The survey reviews the consumption of television worldwide in 2012 and audience successes in 106 territories. This 20th edition brings overall results and key evolutions in the markets surveyed.



The Report features:

- > Annual daily viewing time per individual
- > Audience shares for all channels (total day & prime time)
- > Channel genre, status and their technical penetration
- > Audience measurement and TV distribution information
- > Ranking of the best watched TV shows

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