

## **World Television Market**

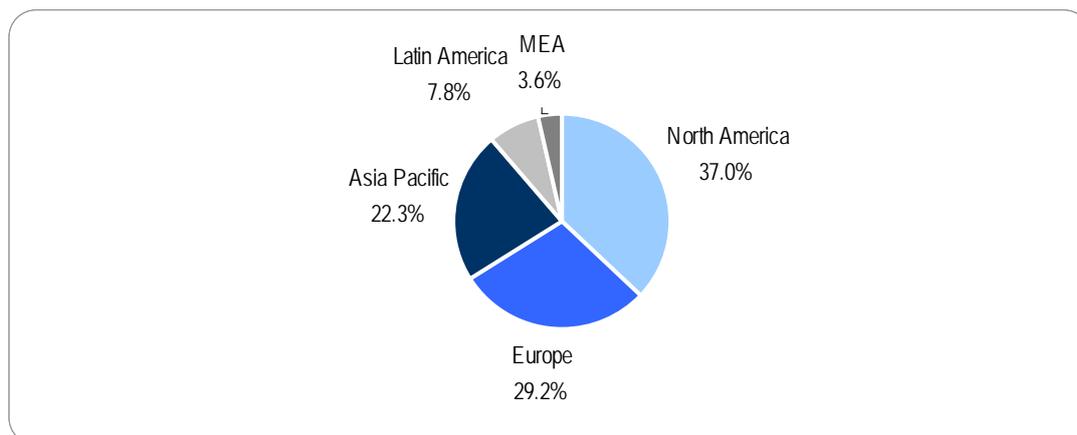
### **After stagnation in 2009, the world market rebounds in 2010 with sustained annual growth of 7.1%**

Montpellier, 12 January 2011 – **IDATE has just released the 21<sup>st</sup> edition of its biannual “World TV Markets” report. The TV industry is back on a growth path, with a global market of EUR 289.2 billion, which marks a 7.1% increase compared to 2009. This report analyses the overriding trends and changes taking place in the markets around the globe. It explores the driving forces behind the market’s growth and transformation, including an examination of the chief market trends, plus volume and value forecasts up to 2014 by geographical area and by country.**

“2010 has been a flourishing year overall for the audiovisual industry”, says Florence Le Borgne, Director of IDATE’s TV & Digital Content Business Unit. “Most of the mature markets are reporting encouraging growth rates, in particular thanks to increasingly higher advertising revenue. In the meantime, the pay-TV sector has consolidated its new status as the industry’s most important source of income, generating 48% of the sector’s revenue in 2010 versus 43% for advertising. These percentages should remain more or less stable in the coming years.”

#### **Change in Television Revenue**

##### **Distribution of worldwide TV revenue in 2010<sup>(e)</sup>**



<sup>(e)</sup> estimates

Source: IDATE

IDATE estimates that the worldwide television market in 2010 was worth 289.2 billion EUR, rising 7.1% compared to 2009. The industry is therefore back on a growth path after a year of relative stagnation – reporting growth of a mere 0.6% in 2009.

The United States remains the largest television market in the world with a turnover of 103 billion EUR in 2010, rising 4.5% in a year after posting a slight dip (-0.7%) in 2009. The North American region’s share of the global market declined to 37% in 2010 compared to 38% in 2009.

As the second largest regional market, Europe had a turnover of 84.4 billion EUR in 2010, a rise of 6.6% compared to 2009. The United Kingdom, Germany and France are the heavyweights in the region and together represent more than half (56%) of the region’s revenue. While the United Kingdom and France saw an increase of 6.2% and 5.3%, respectively, Germany is making slower progress (1.2%). The Europe share of the global market has stagnated at 29%.

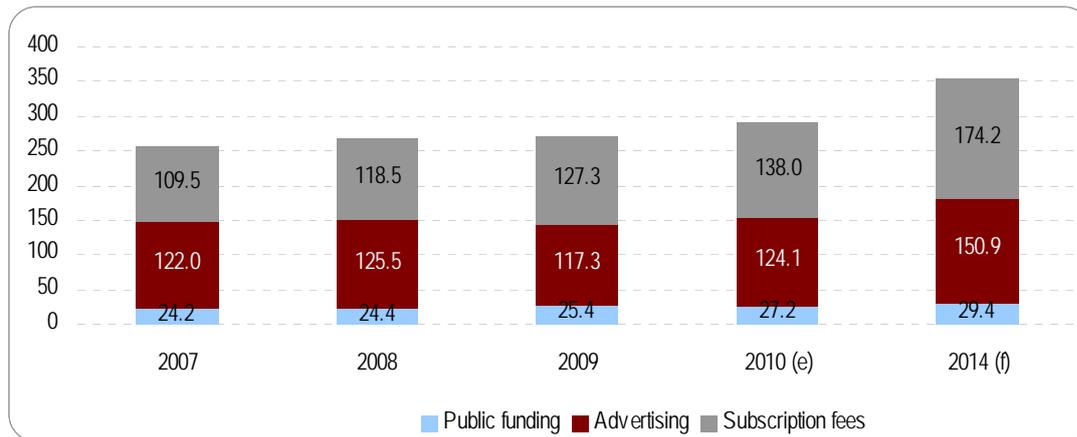
Asia/Pacific recorded a great growth in its TV market of 9.1% in 2010. Its share of the global market rose by 0.4 points to 22.3%. The heavyweights in the region, Japan, India and China, experienced varied results. Despite being a mature market, Japan was back on an upwards trajectory in 2010, with TV revenue increasing by 3.9%, while China was reporting a 12.2% increase, which is more than two

and a half times the 2009 growth rate, and India continued to enjoy a solid momentum, reporting 13.3% growth in 2010 compared to 15.4% the year before.

Latin America displayed a good level of growth in its TV market, with an increase of 12.8%. Its market share in the worldwide market is still small (7.8%), but it is growing every year (6.4% in 2007). Brazil is the largest market in Latin American TV and alone makes up 44% of the market.

The smallest regional market, Africa/Middle East displayed the greatest growth in its TV market, with an increase of 16.9% compared to 2009. Its share of the global market is increasing to 3.6% in 2010, compared to 3.3% in 2009.

**Change in worldwide TV revenue by type of financing, 2007-2014 (Billion EUR)**



(e) estimates – (f) forecasts

Source: IDATE

The global TV market's growth in 2009 is due chiefly to a rise in pay-TV revenue (+8.4%), with ad revenue rising at a lesser rate (+5.8%). Public financing did rise by 6.9% in 2010 but still accounts for less than 10% of the global television market's income.

Up until 2008, advertising was by far the primary means of funding for the industry, generating about 47% of the sector's revenue, compared to nearly 44% for paid television and 9.4% for public funding. The situation began to reverse in 2009 and, in 2010, paid television accounted for 48% compared to 43% for advertising. In the years to come, IDATE predicts this trend will become more pronounced and estimates that paid television should generate more than 49% of revenue of the worldwide television market by 2014.

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**About IDATE**

Founded in 1977, IDATE is one of Europe's foremost market analysis and consulting firms, whose mission is to provide assistance in strategic decision-making for its clients in the Telecom, Internet and Media industries, through the following two areas of activity: **Consulting & Research** (an independent consultancy and publication of a catalogue of market reports) and the **DigiWorld Programme** (a member-supported annual programme: DigiWorld Club, DigiWorld Summit, DigiWorld Yearbook Communications & Strategies...).

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