



**KommAustria**  
Kommunikationsbehörde Austria

*We stand for competition and media diversity*



# The Audiovisual Media Market in Austria

## Services, challenges and revenues

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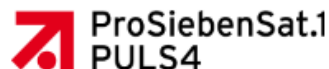
# Austrian TV market

## Nationwide private television since 2003

4 nationwide public channels



6 nationwide commercial channels



Regional (R9 marketing association)



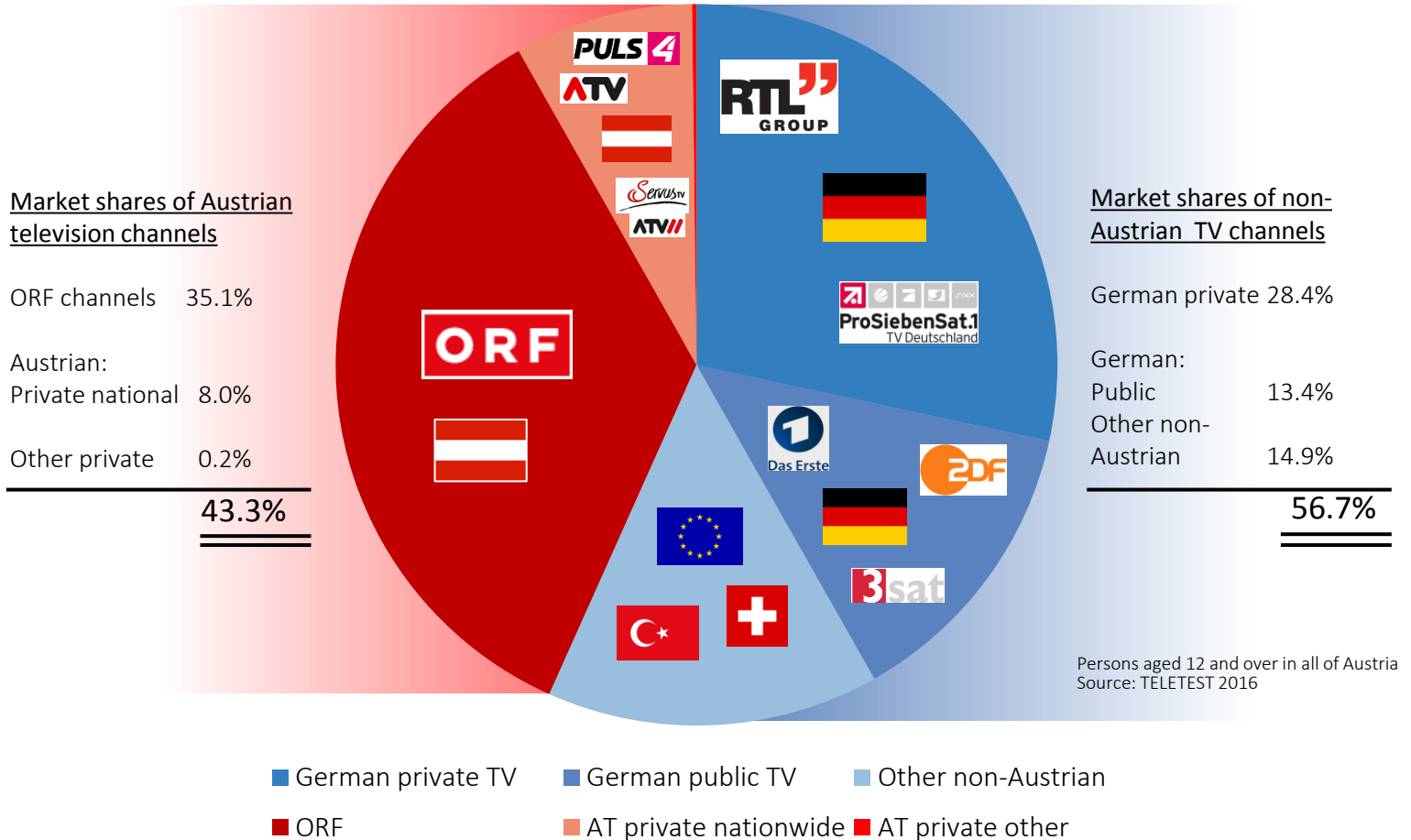
Plus:  
13 local broadcasters  
3 community  
broadcasters  
155 on-demand  
services

Sept. 2017



# Intense competition in Austria's TV market

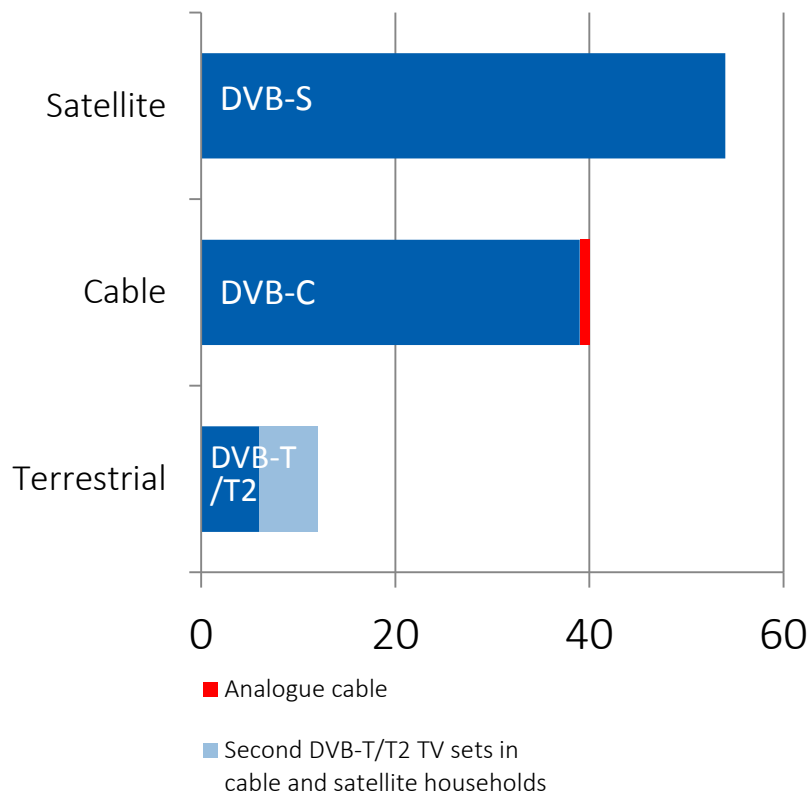
## Dominated by non-Austrian channels





# TV reception in Austrian households

## 99% digital



**54% satellite households**

Exclusively digital since 2012

**40% cable households**

Analogue shutdown 2016–2017

1% analogue in small cable networks  
(hotels, senior citizens' residences etc.)

**12% terrestrial households**

(6% only DVB-T/T2, 6% with second sets)

DVB-T since 2006, DVB-T2 since 2013

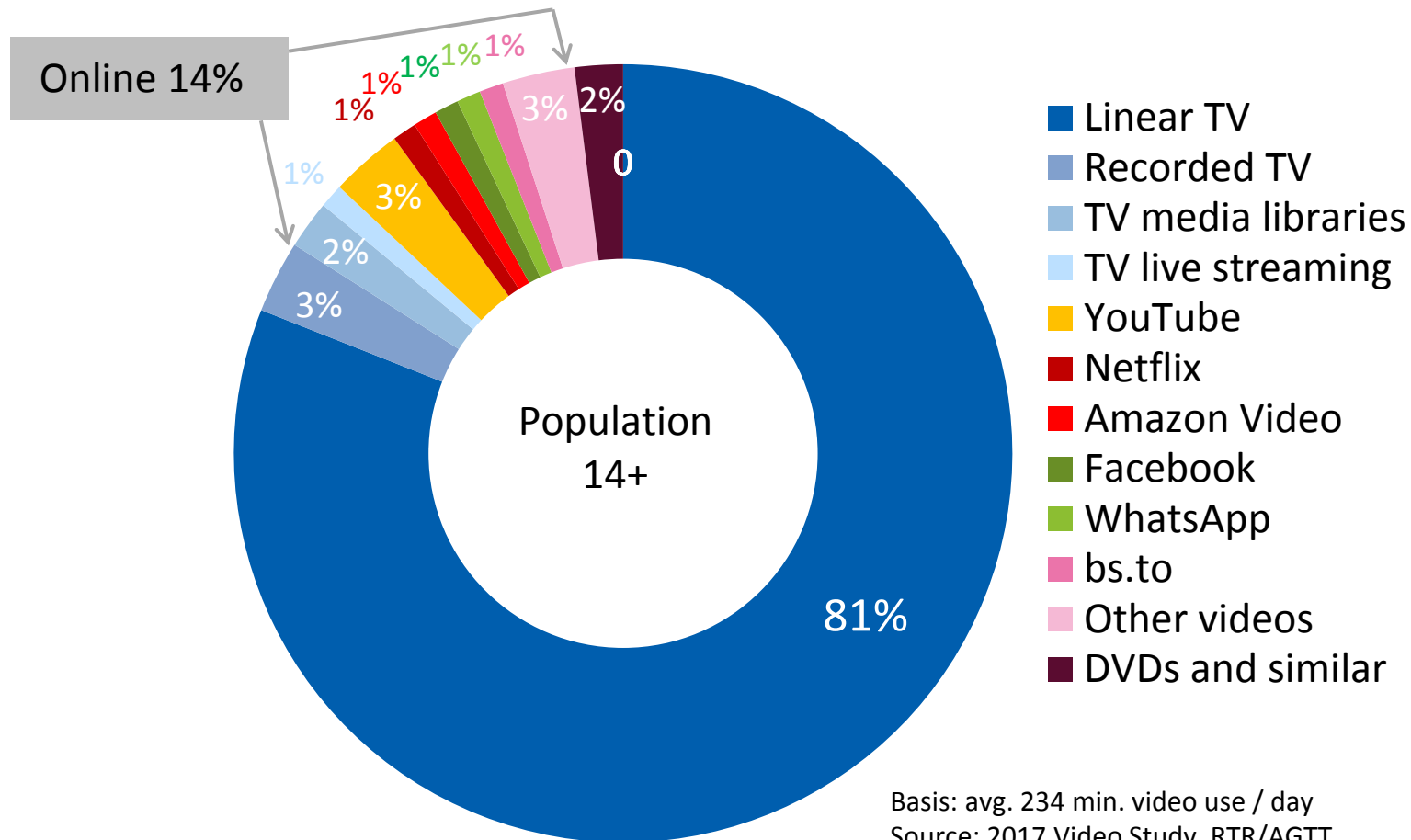
Migration to DVB-T2 by 24/10/2017

6 multiplexes, c. 40 TV channels



# Use of video services

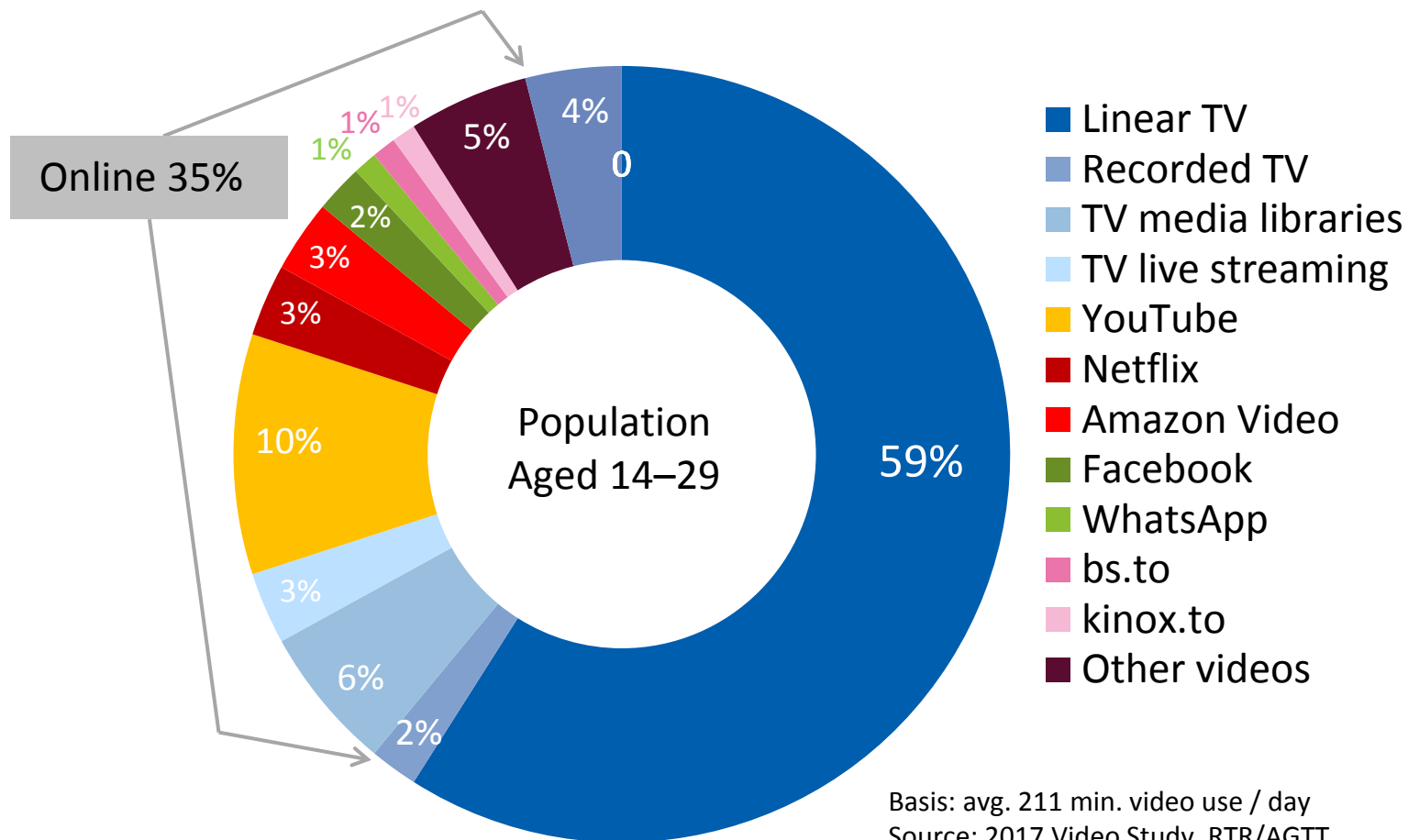
Average daily market share, persons 14 and over





# Use of video services

Average daily market share, persons aged 14–29





# Austrian radio market

## 80 stations – private radio since 1995

3 nationwide public stations



9 regional public stations



1 nationwide commercial station



53 regional and local commercial

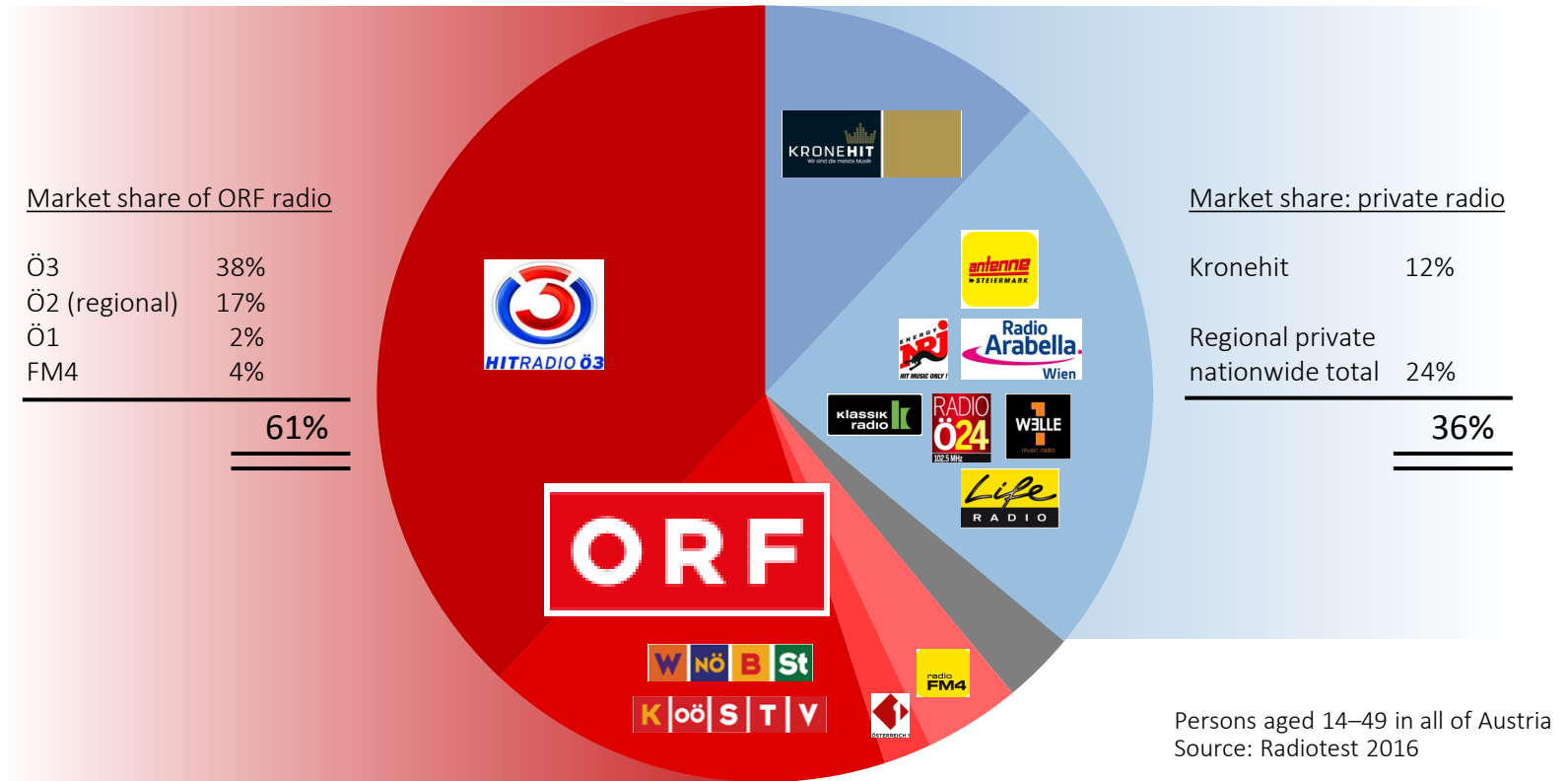






# Austria's dual radio market

## Dominated by ORF



■ Kronehit  
 ■ Private regional  
 ■ Non-Austrian  
 ■ FM4  
 ■ Ö1  
 ■ Ö2 (regional)  
 ■ Ö3



# Digital radio on the verge of regular service

## Major market players still holding back though



Trial service in Vienna

Since May 2015

14 stations (3 incumbents and 11 newcomers)  
ORF and the major regional radio stations not among them

31 January – 12 June 2017: KommAustria invitation to tender

Set-up and operation of multiplex platforms

Nationwide and regional service

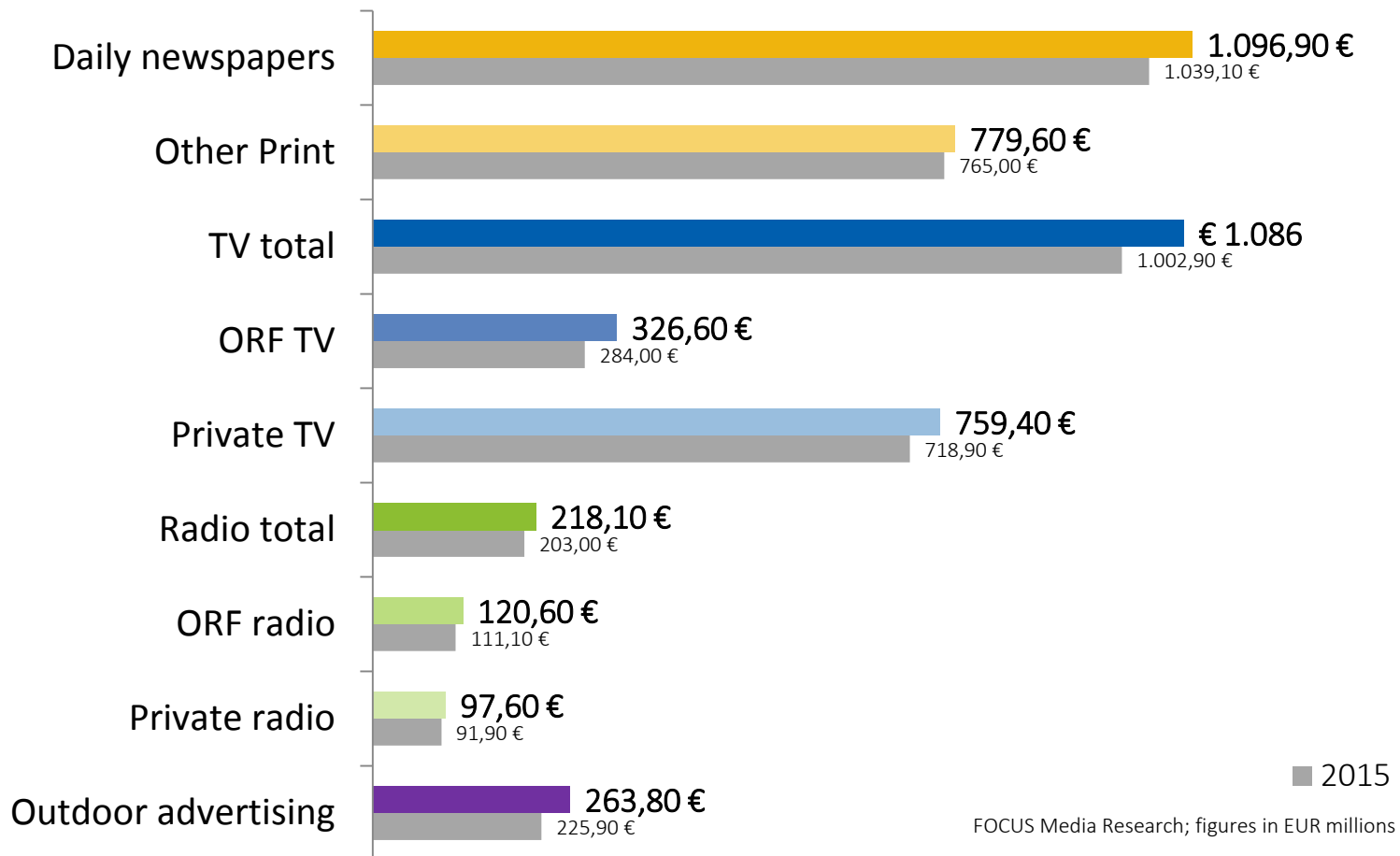
2 applications received

1 application offering nationwide coverage

1 application offering regional coverage in Vienna

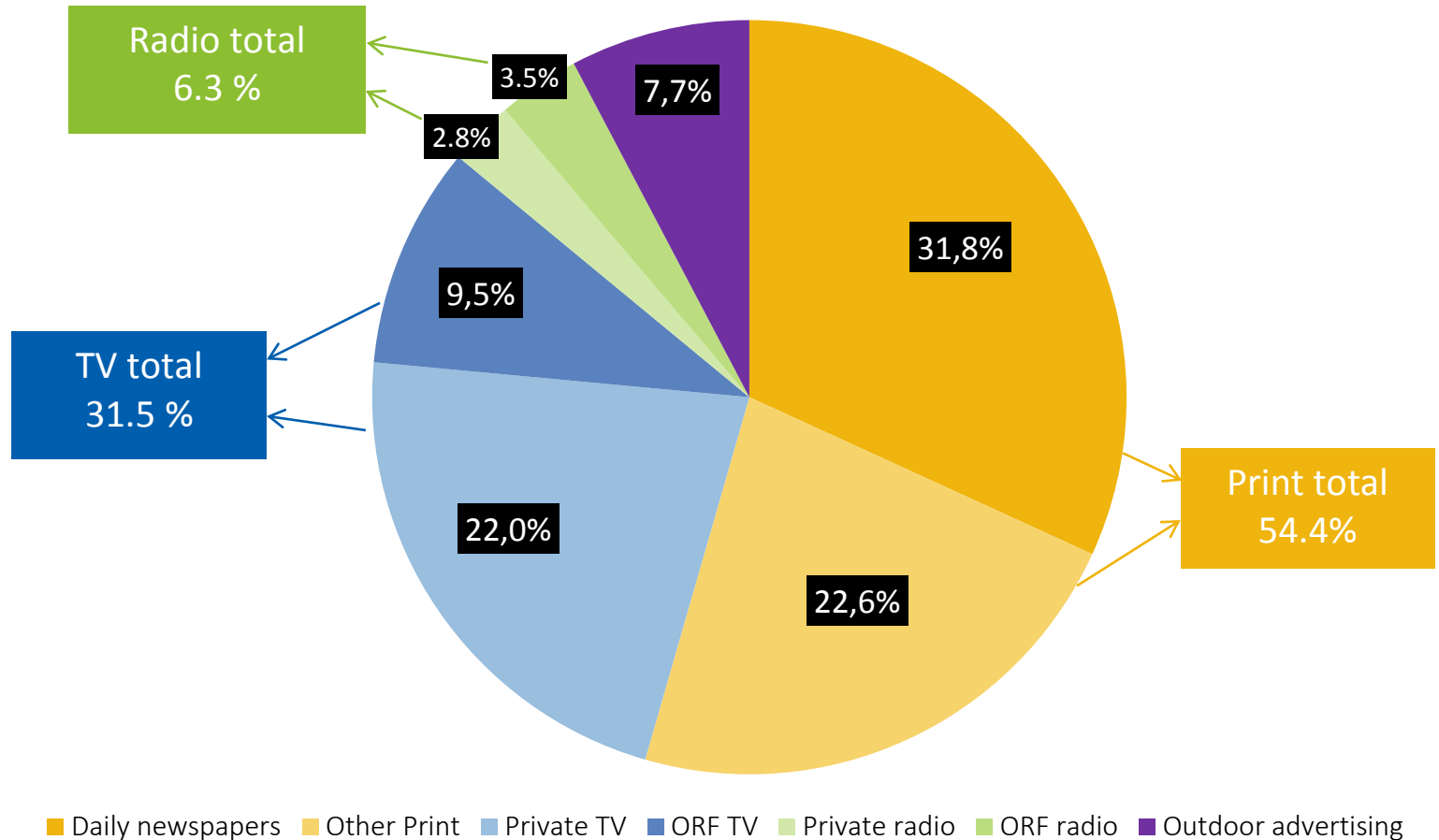


## Gross advertising income of conventional media in AT in 2016: EUR 3.445 billion





# Gross advertising shares of conventional media in AT in 2016 Percentages of EUR 3.445 billion by category





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Thank you for your attention!

Michael Ogris