KommAustria
Kommunikationsbehörde Austria
We stand for competition and media diversity
The Audiovisual Media Market in Austria

Services, challenges and revenues

Michael Ogris
Chairperson
KommAustria – Austrian Communications Authority
Austrian TV market
Nationwide private television since 2003

4 nationwide public channels

ORF eins
ORF 2
ORF
ORF SPORT+

6 nationwide commercial channels

ProSiebenSat.1
PULS 4
Red Bull MEDIA HOUSE
Servus TV
ÖSTERREICH
go tv

Regional (R9 marketing association)

R9
W24
schau tv
LTO
schau tv
österreich

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

Sept. 2017

46th EPRA Meeting, Vienna, 11–13 October 2017
Intense competition in Austria’s TV market
Dominated by non-Austrian channels

Market shares of Austrian television channels

- ORF channels: 35.1%
- Austrian:
  - Private national: 8.0%
  - Other private: 0.2%

Market shares of non-Austrian TV channels

- German private: 28.4%
- German:
  - Public: 13.4%
  - Other non-Austrian: 14.9%

Persons aged 12 and over in all of Austria
Source: TELETEST 2016

46th EPRA Meeting, Vienna, 11–13 October 2017
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

Population 14+

- Linear TV: 81%
- Recorded TV: 3%
- TV media libraries: 2%
- TV live streaming: 1%
- YouTube: 1%
- Netflix: 1%
- Amazon Video: 1%
- Facebook: 1%
- WhatsApp: 1%
- bs.to: 1%
- Other videos: 2%
- DVDs and similar: 0%

Online 14%

Basis: avg. 234 min. video use / day
Source: 2017 Video Study, RTR/AGTT

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Use of video services
Average daily market share, persons aged 14–29

Online 35%

Population Aged 14–29

Basis: avg. 211 min. video use / day
Source: 2017 Video Study, RTR/AGTT

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Austrian radio market
80 stations – private radio since 1995

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<tr>
<th>Type</th>
<th>Number</th>
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<td>Nationwide public stations</td>
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<td>ORF</td>
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<td>KRONE HIT</td>
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<td>Regional and local commercial</td>
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Plus:
14 community radio stations

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Austria’s dual radio market
Dominated by ORF

Market share of ORF radio
- Ö3: 38%
- Ö2 (regional): 17%
- Ö1: 2%
- FM4: 4%

61%

Market share: private radio
- Kronehit: 12%
- Regional private nationwide total: 24%

36%

Persons aged 14–49 in all of Austria
Source: Radiotest 2016

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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

- Daily newspapers: EUR 1.096.90 million
- Other Print: EUR 779.60 million
- TV total: EUR 1.086 million
- ORF TV: EUR 326.60 million
- Private TV: EUR 759.40 million
- Radio total: EUR 218.10 million
- ORF radio: EUR 120.60 million
- Private radio: EUR 97.60 million
- Outdoor advertising: EUR 263.80 million

FOCUS Media Research; figures in EUR millions

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Gross advertising shares of conventional media in AT in 2016

Percentages of EUR 3.445 billion by category

- **TV total**: 31.5%
- **Radio total**: 6.3%
- **Print total**: 54.4%
- **Daily newspapers**: 22.0%
- **Other Print**: 22.6%
- **Private TV**: 9.5%
- **ORF TV**: 7.7%
- **Private radio**: 2.8%
- **ORF radio**: 3.5%
- **Outdoor advertising**: 31.8%

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Thank you for your attention!

Michael Ogris