



KommAustria
Kommunikationsbehörde Austria

SURVEY OF REACH AND MARKET SHARES 2021

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2021 survey of reach and market shares

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2021 survey of reach and market shares⁰¹

1. Introduction

Art. 65 of the Audiovisual Media Services Act (AMD-G) requires a survey of the reach (market shares), coverage levels and user and viewer figures, as necessary for enforcing the provisions of the AMD-G in the context of legal supervision.

Based on these provisions, market research was carried out in 2022 for the 2021 calendar year, just as had been the case the previous year for the 2020 calendar year. As part of the survey, all providers were queried about reach (market shares), coverage levels and user and viewer numbers.

Survey type:

A total of 451 providers were sent requests, including 155 television broadcasters, 159 providers of on-demand services, 70 radio broadcasters and 170 cable network operators. The survey considered all services that were listed in the KommAustria directory as of the survey date of 11 January 2022 and that were active during the 2021 calendar year.

The survey entailed the questions listed below.

Television channels:

- What was the average daily reach of the television channel as a percentage of the 12+ target group (Monday to Sunday) in the previous calendar year?
- What was the average market share of the television channel as a percentage of the 12+ target group (Monday to Sunday) in the previous calendar year?

On-demand services/non-linear audiovisual media services:

- How many users (subscribers or individual customers) did the on-demand service have on average in the previous calendar year?
- How frequently was the on-demand service requested in the previous calendar year?

The data presented in this document are based on the information supplied by the service providers themselves and may accordingly refer to varying reference values (such as coverage areas), depending on the service. The responses provided by the service providers as a whole are therefore comparable only to a limited extent.

Data accuracy:

KommAustria cannot verify the accuracy of the raw data. In the areas of reach and market shares in particular, it is important to note that the survey was not carried out Austria-wide in practice for media services with small regional or local coverage areas. This is because the case numbers (or respondents) in each small coverage area are too low to obtain any useful data. To achieve valid results that also include small coverage areas, the case numbers of Austria-wide surveys would have to be substantially increased, or else individual usage reports would have to be commissioned for all regional or local coverage areas. Neither variant is economically viable for media services providers.

⁰¹ (as of 25 March 2022)

2. 2021 market report

The data queried pursuant to Art. 65 AMD-G can be divided into three areas:

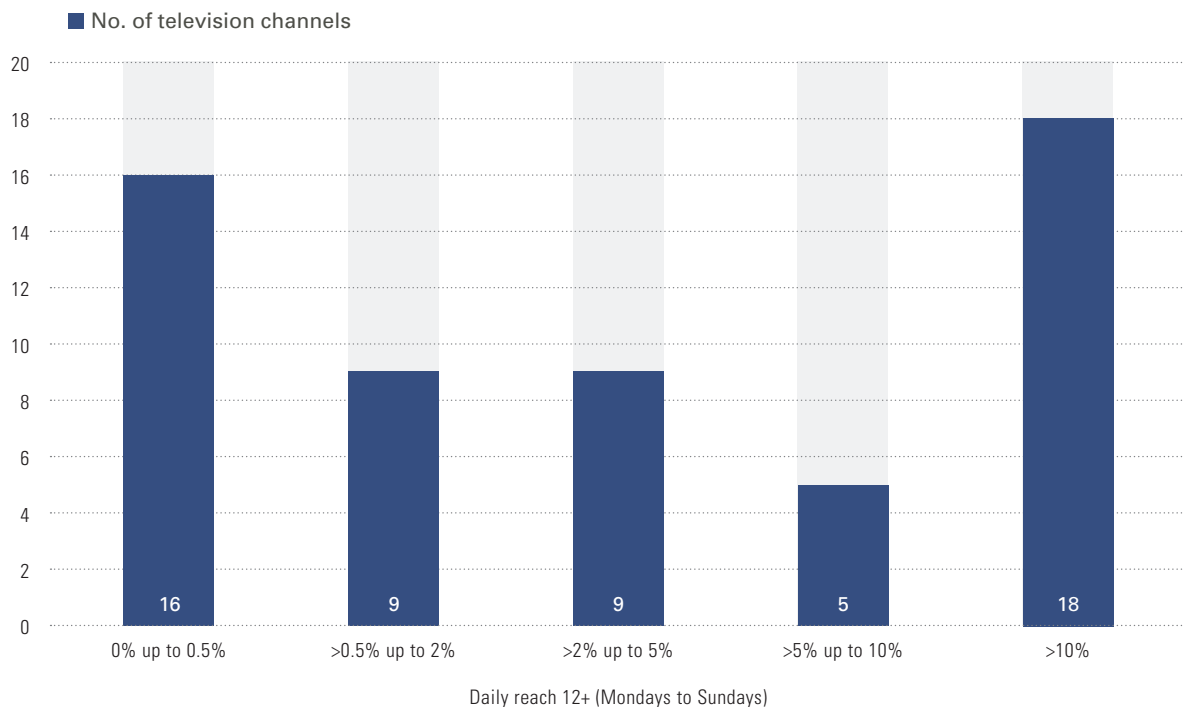
- Television channels
- On-demand services/non-linear audiovisual media services
- Cable networks

To represent the broadcasting market in its entirety, selected data relating to radio broadcasting are also provided. This is based on information provided voluntarily by radio broadcasters.

2.1 Television channels

For television channels, the daily reach and the market share were queried in the 12+ target group for Mondays to Sundays. The diagrams provided display the reported information as a bar chart divided into ranges. The data include television channels with nationwide as well as local and regional coverage, while the specified reach and market shares refer to the particular television broadcaster's coverage area. As such, the data are comparable only to a limited extent.

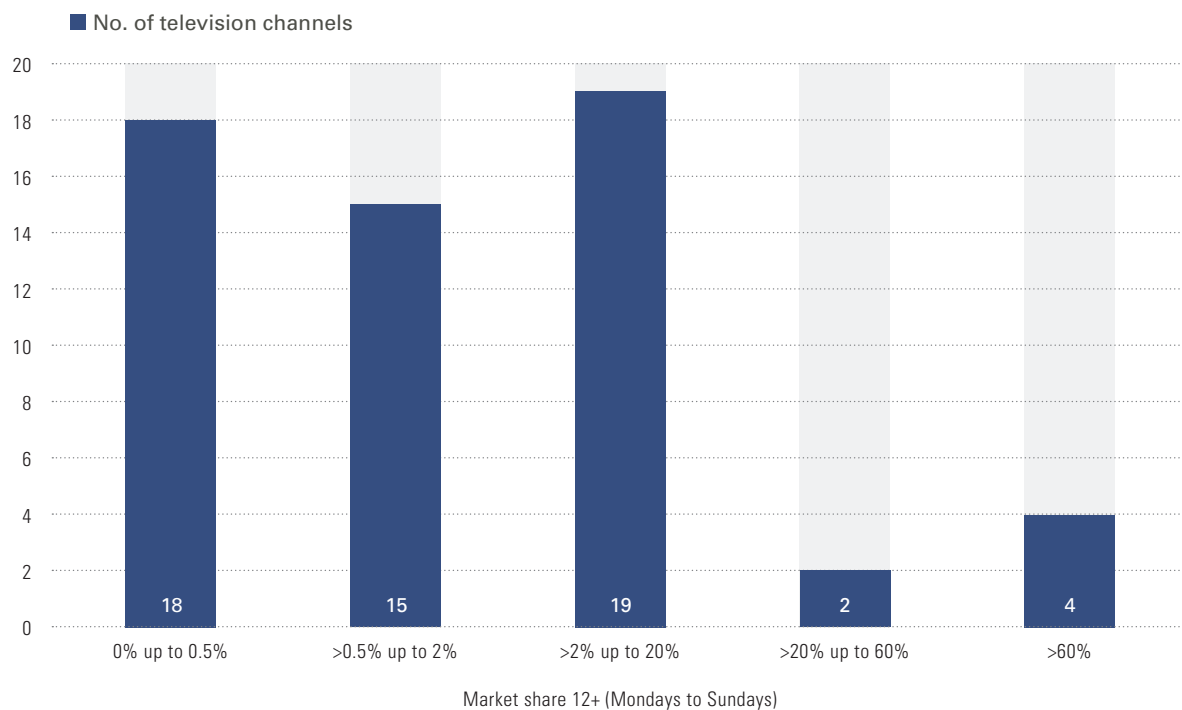
Figure 01: Number of television channels within specified daily reach ranges among viewers 12+ in 2021 (no data exist or are available for 194 providers)



Compared with the chart above, the number of television channels in relation to daily reach among the 12+ target group (Monday to Sunday) in 2020 is as follows:

- 0% to 0.5%: 26
- Over 0.5% and up to 2%: 12
- Over 2% and up to 5%: 6
- Over 5% and up to 10%: 1
- Over 10%: 20
- No information: 190

Figure 02: Number of television channels within specified market share ranges among viewers 12+ in 2021
 (no data exist or are available for 193 providers)



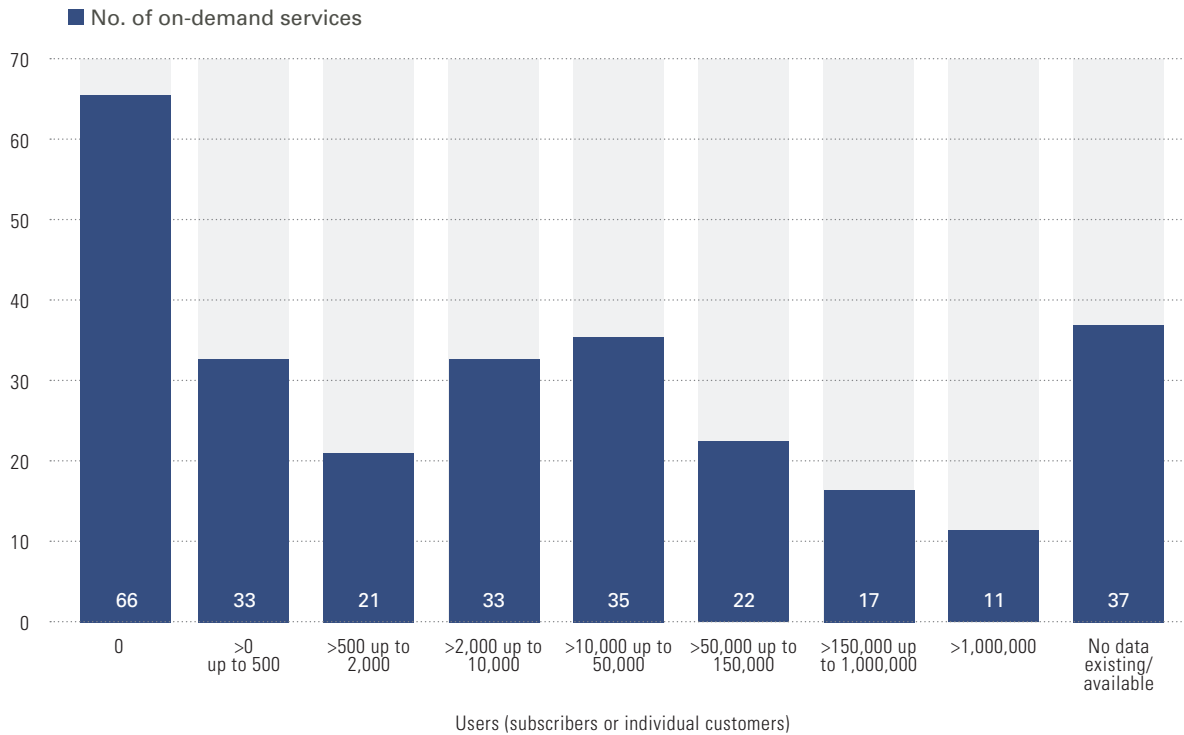
Compared with the chart above, the number of television channels in relation to market share among the 12+ target group (Monday to Sunday) in 2020 is as follows:

- 0% to 0.5%: 33
- Over 0.5% and up to 2%: 15
- Over 2% and up to 20%: 9
- Over 20% and up to 60%: 4
- Over 60%: 9
- No information: 185

2.2 On-demand services/non-linear audiovisual media services

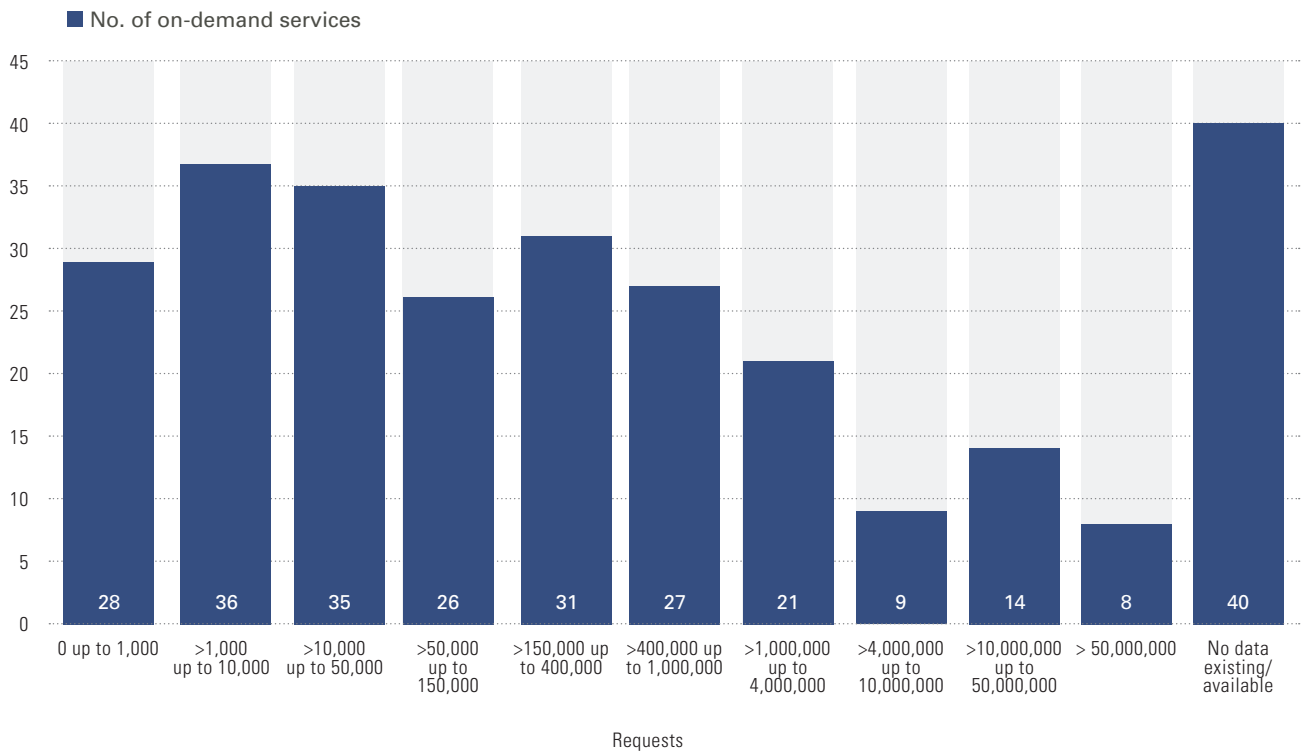
In the area of on-demand services/non-linear audiovisual media services, the questions focused on the number of users (subscribers or individual customers) and service requests. As above for television channels, the figures that are reported here are also divided into ranges and displayed as a bar chart.

Figure 03: Number of users (subscribers or individual customers) of on-demand services in 2021 within specified ranges



Compared with the chart above, the number of subscribers in 2020 is as follows:

- 0: 99
- Over 0 and up to 500: 28
- Over 500 and up to 2,000: 34
- Over 2,000 and up to 10,000: 38
- Over 10,000 and up to 50,000: 24
- Over 50,000 and up to 150,000: 21
- Over 150,000 and up to 1 million: 15
- Over 1 million: 4
- No information: 18

Figure 04: Number of service requests in 2021 within specified ranges

Compared with the chart above, the number of requests in 2020 is as follows:

- 0 to 1,000: 27
- Over 1,000 and up to 10,000: 28
- Over 10,000 and up to 50,000: 40
- Over 50,000 and up to 150,000: 34
- Over 150,000 and up to 400,000: 35
- Over 400,000 and up to 1 million: 33
- Over 1 million and up to 4 million: 27
- Over 4 million and up to 10 million: 9
- Over 10 million and up to 50 million: 15
- Over 50 million: 7
- No information: 26

2.3 Radio stations

Daily reach and market shares were queried in the radio station category; for the bar chart presented, the daily reach and market shares were specifically queried among the 10+ target group for Mondays to Sundays. Again, the information is presented here as a diagram in which the reported data are broken down into ranges. The data include radio stations with nationwide as well as local and regional coverage, while the specified reach and market share refer to the particular radio broadcaster's coverage area.

Figure 05: Number of radio stations within specified daily reach ranges among listeners 10+ in 2021
 (70 providers did not specify any information)

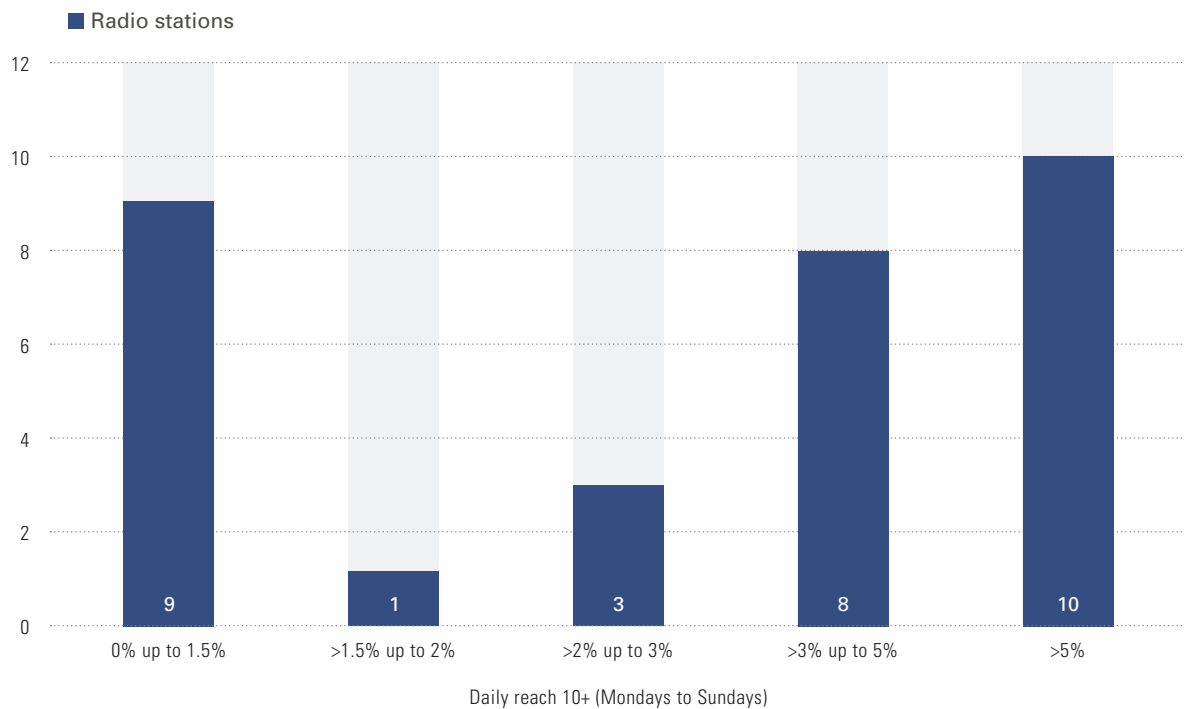
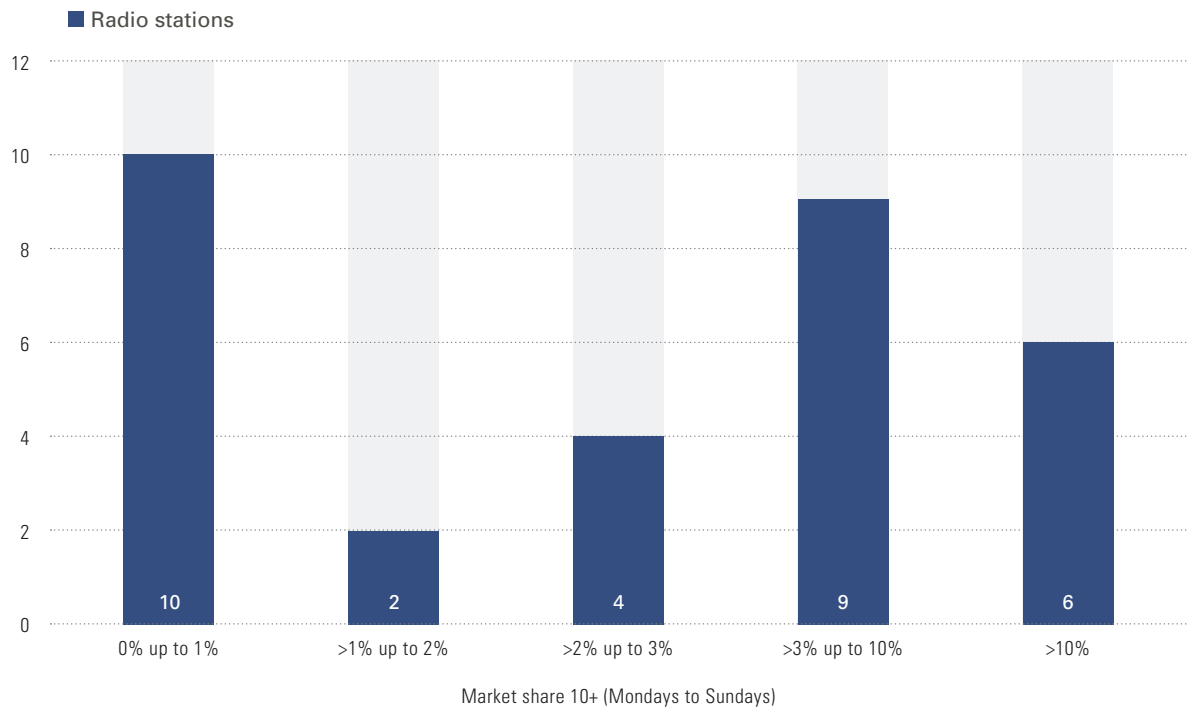


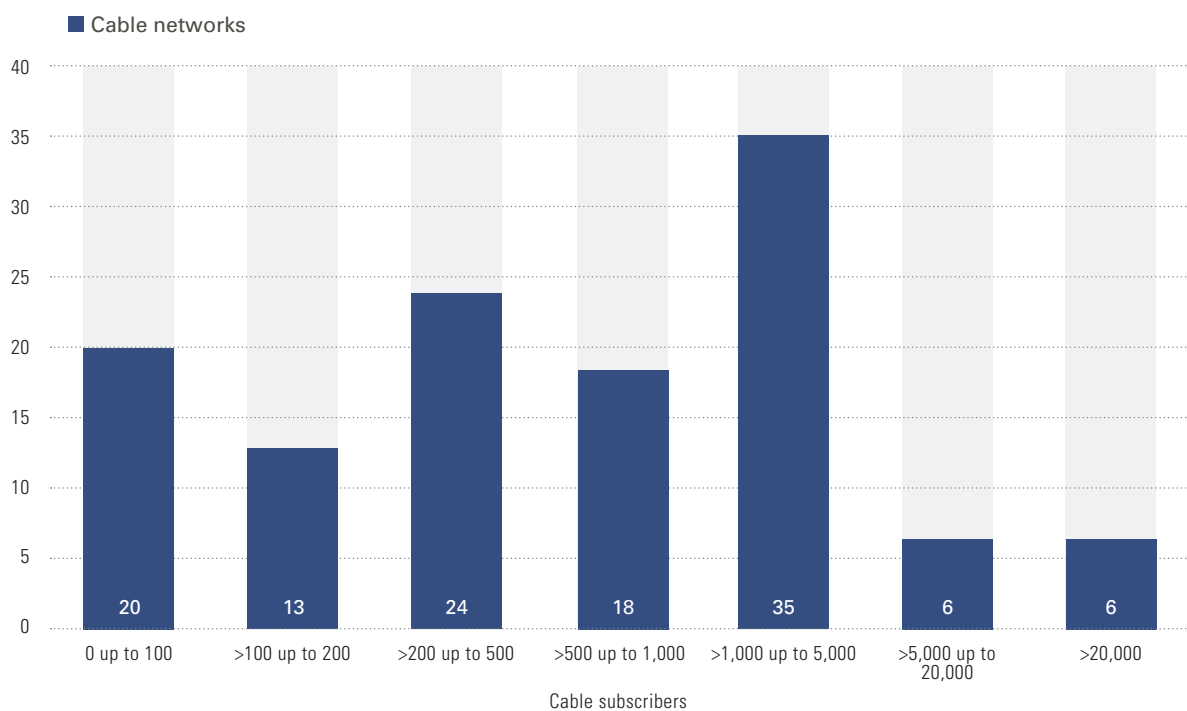
Figure 06: Number of radio stations within market share ranges among listeners 10+ in 2021
 (70 providers did not specify any information)



2.4 Cable networks

The number of subscriptions was queried for cable networks. Again, the relevant figures were divided into ranges, with the bar chart included below created on this basis.

Figure 07: Number of cable networks within subscription ranges in 2021



3. Selected detailed results

In addition, survey results were singled out from the various areas and used as examples which are presented for the whole of 2021. Note that the information presented here is based on the figures provided directly by the service providers.

Figure 08: Top 10 nationwide television channels by daily reach as a percentage of viewers 12+ in 2021

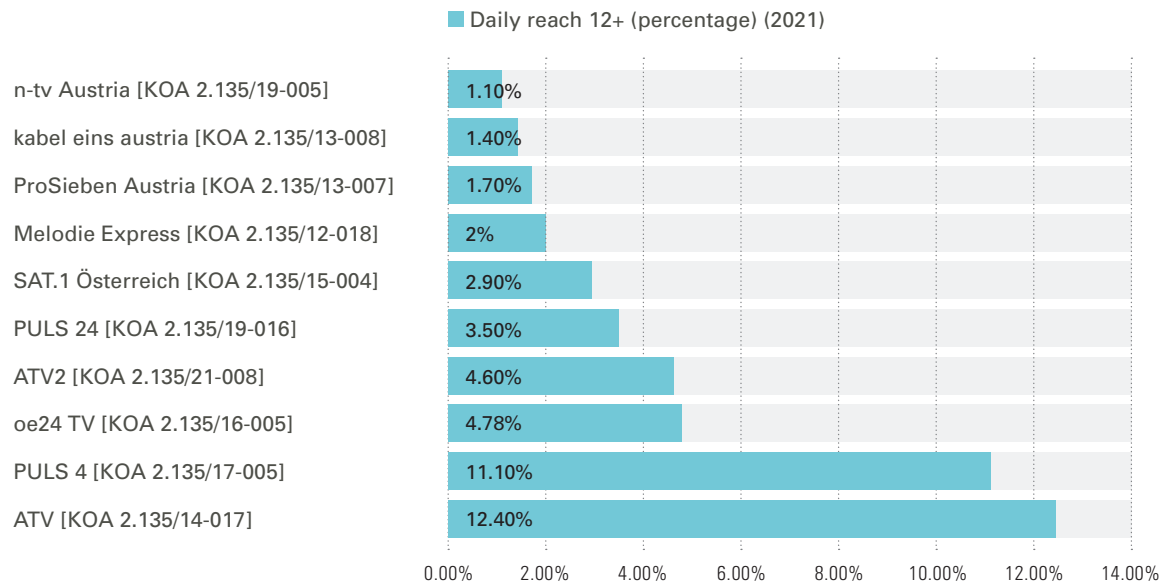


Figure 09: Top 10 on-demand services/non-linear audiovisual media services broken down by the number of users (subscribers or individual customers) in 2021

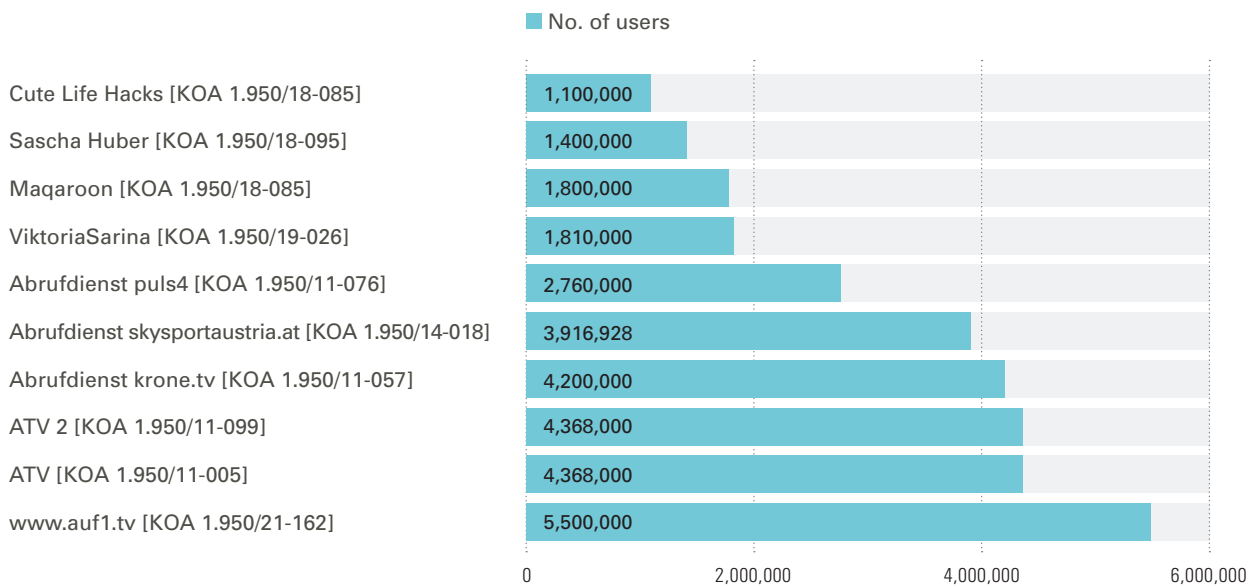


Figure 10: Top 10 on-demand services/non-linear audiovisual media services broken down by service requests in 2021

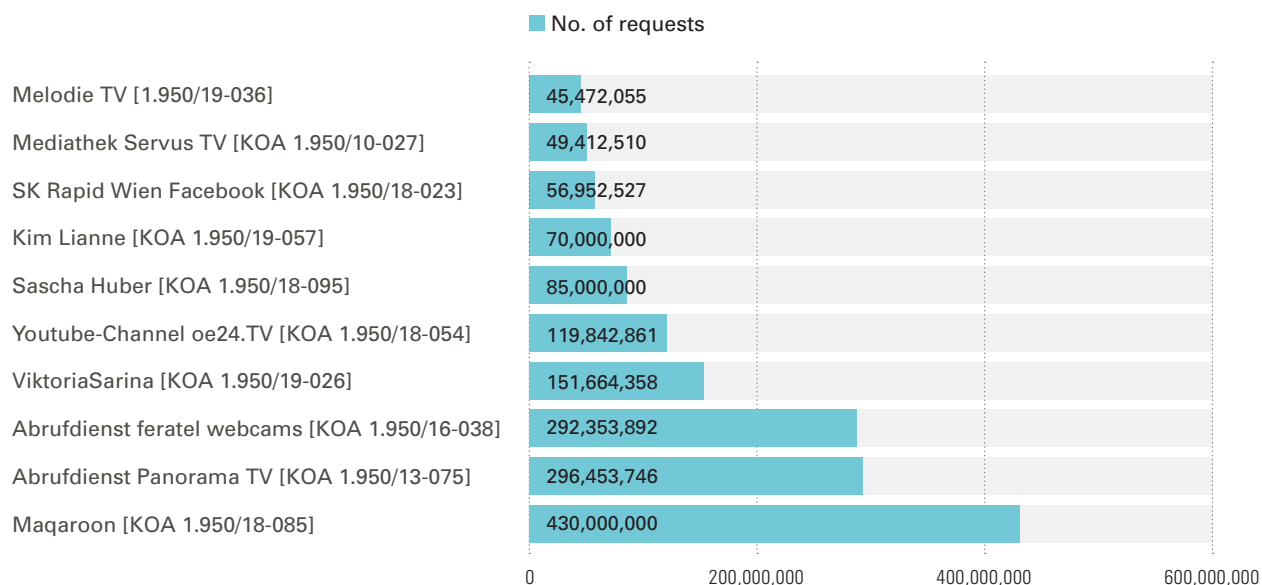


Figure 11: Ratio of number of users (subscribers or individual customers) of the top 10 on-demand services/non-linear audiovisual media services as a percentage of the number of users (subscribers or individual customers) of other on-demand services/non-linear audiovisual media services in 2021

■ Users (subscribers or individual customers) of top 10
 ■ Users (subscribers or individual customers) of other on-demand services

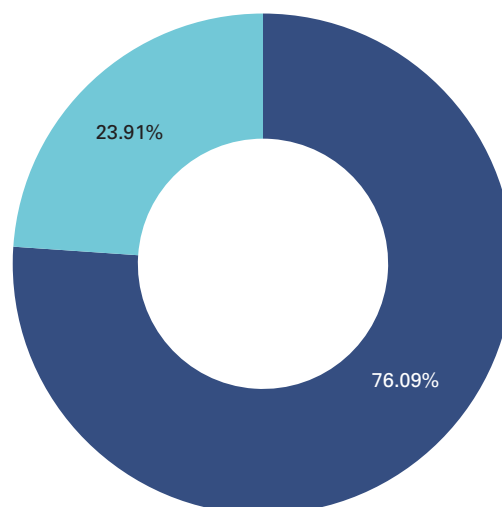
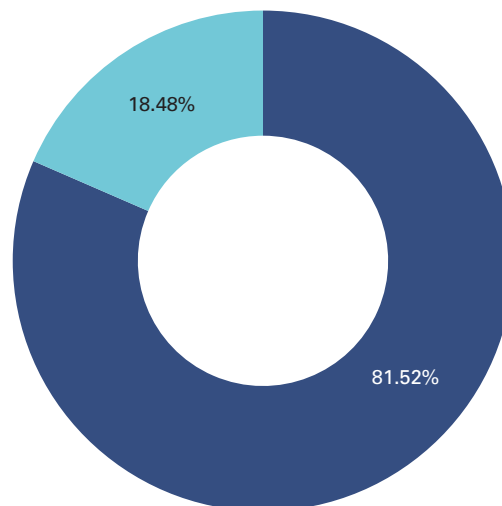


Figure 12: Ratio of service requests for the top 10 on-demand services/non-linear audiovisual media services as a percentage of requests for other on-demand services/non-linear audiovisual media services in 2021

■ Requests for top 10
 ■ Requests for other on-demand services



4. Link to the overall survey results

All survey results for the areas of television and on-demand services/non-linear audiovisual media services are available on the RTR website at <https://www.rtr.at/Reichweiten-undMarktanteilerhebung2021> (in German).

The following information is listed:

Television: provider, service, period (from/to), daily reach 12+ (in %), market share 12+ (in %)
On-demand services: provider, service, period (from/to), number of users (subscribers or individual customers), number of requests

It must again be noted that the figures presented are based on information directly provided by the service providers, while the data relating to reach and market shares in particular refer to the particular service provider's coverage area.

Publishing information

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