

KommAustria
Kommunikationsbehörde Austria

SURVEY OF REACH AND MARKET SHARES

2023



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2023 survey of reach and market shares

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2023 survey of reach and market shares¹

1. Introduction

To enable the enforcement of the provisions of the Audiovisual Media Services Act (AMD-G) as part of legal supervision, Art. 65 AMD-G requires a survey of the reach (market shares), coverage levels, and user and viewer figures.

Based on these provisions, market research was carried out in 2024 for the 2023 calendar year, just as had been the case for the 2020, 2021 and 2022 calendar years. As part of the survey, all providers were queried about reach (market shares), coverage levels and user and viewer numbers.

Survey method

A total of 456 providers were sent requests, including 157 television broadcasters, 163 providers of on-demand services, 72 radio broadcasters and 163 cable network operators. The survey considered all services that were listed in the KommAustria directory as of the survey date of 8 January 2024 and that were active during the 2023 calendar year. During the 2023 calendar year, twelve television channels, nine on-demand services and eleven radio stations began service, while also four cable networks become operational, all of which were additionally included in the basic group surveyed. During the same period, 16 television channels and 32 on-demand services discontinued service, as did two radio stations and one cable network.

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:

- 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 directly by the service providers. The figures may thus relate to varying reference values (such as coverage areas), depending on the service. The responses given by the service providers as a whole are therefore comparable only to a limited extent.

¹ As of 18 April 2024

Data validity

KommAustria cannot verify the validity of the raw data. In the areas of reach and market shares in particular, it is important to note that in practice the survey was not carried out Austria-wide 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, much greater case numbers in Austria-wide surveys would be needed, or else usage reports would have to be commissioned for each and every regional or local coverage area. Neither variant is economically viable for media services providers.

2. 2023 market report

The data queried pursuant to Art. 65 AMD-G can be grouped under three categories:

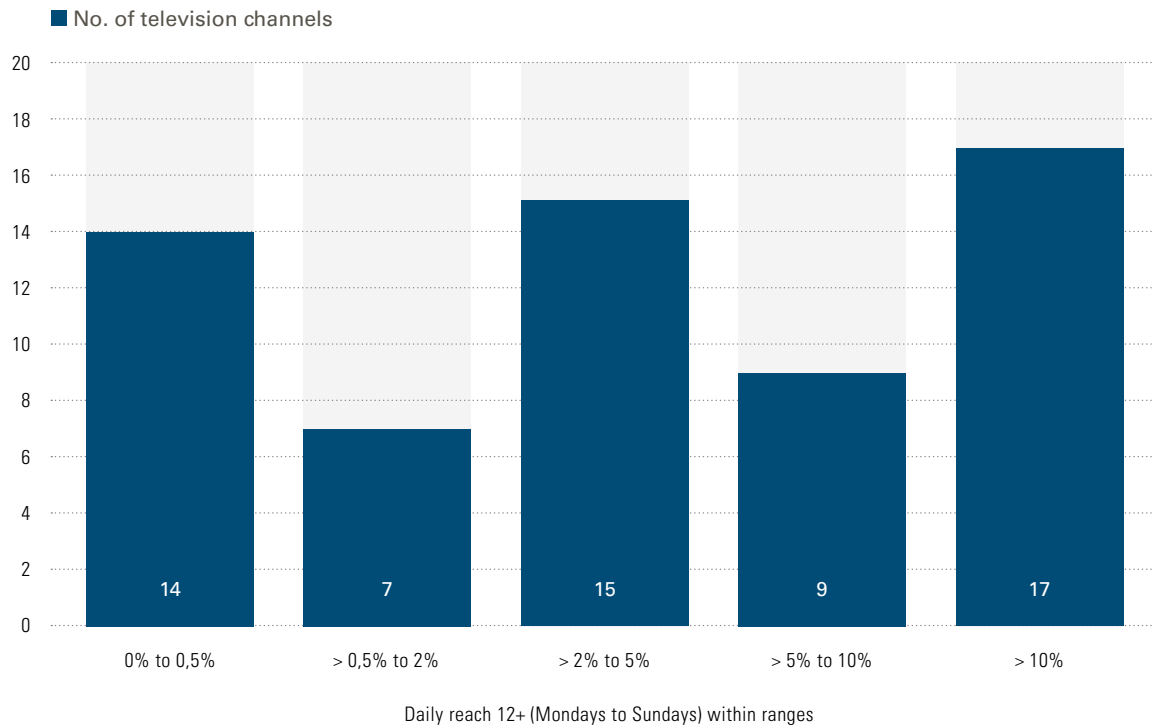
- Television channels
- On-demand services
- Cable networks

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 was queried in the 12+ target group for Mondays to Sundays. The diagrams included here display the reported information as a bar chart divided into ranges. The data encompass 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.

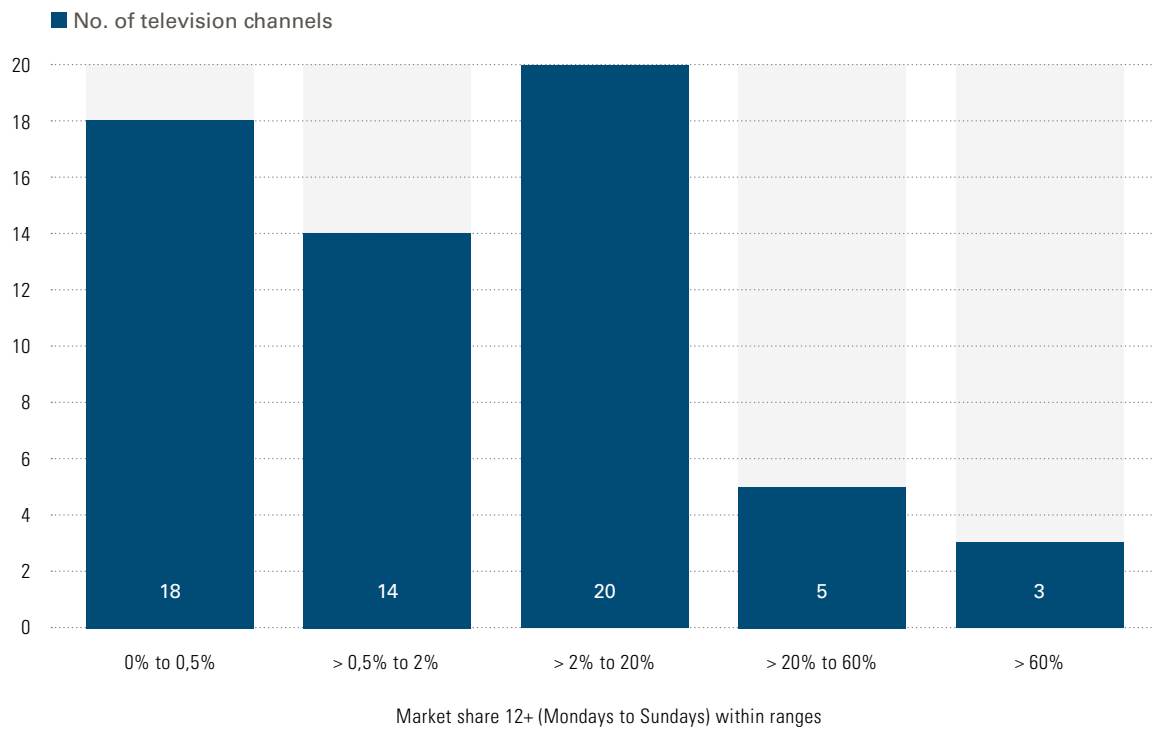
Figure 01: Number of television channels within specified daily reach ranges among viewers 12+ in 2023 (no data exist or are available for 191 providers)



Referring to the chart above, the numbers of television channels falling within specified ranges of daily reach among the 12+ target group (Monday to Sunday) in 2022 are as follows:

- 0% to 0.5%: 16
- Over 0.5% and up to 2%: 3
- Over 2% and up to 5%: 12
- Over 5% and up to 10%: 5
- Over 10%: 18
- No data existing/available 197

Figure 02: Number of television channels within specified market share ranges among viewers 12+ in 2023 (no data exist or are available for 193 providers)



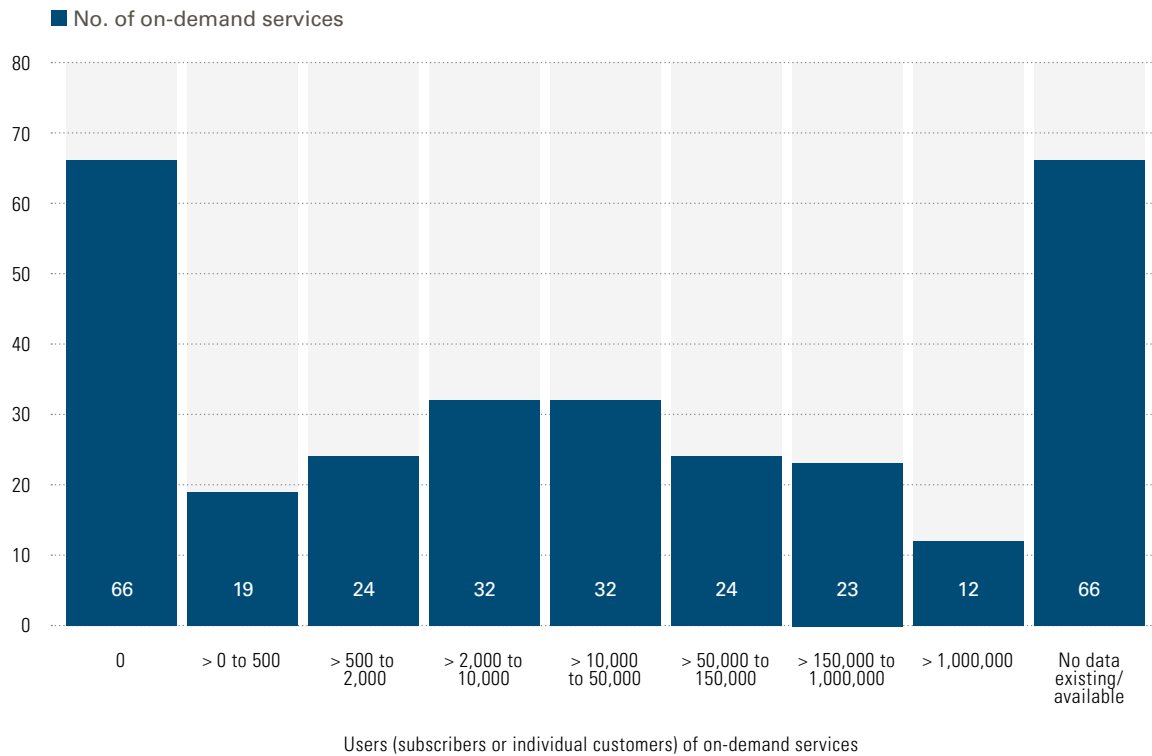
Referring to the chart above, the numbers of television channels falling within specified ranges of market share among the 12+ target group (Monday to Sunday) in 2022 are as follows:

- 0% to 0.5%: 19
- Over 0.5% and up to 2%: 11
- Over 2% and up to 20%: 14
- Over 20% and up to 60%: 4
- Over 60%: 6
- No data existing/available 197

2.2 On-demand services

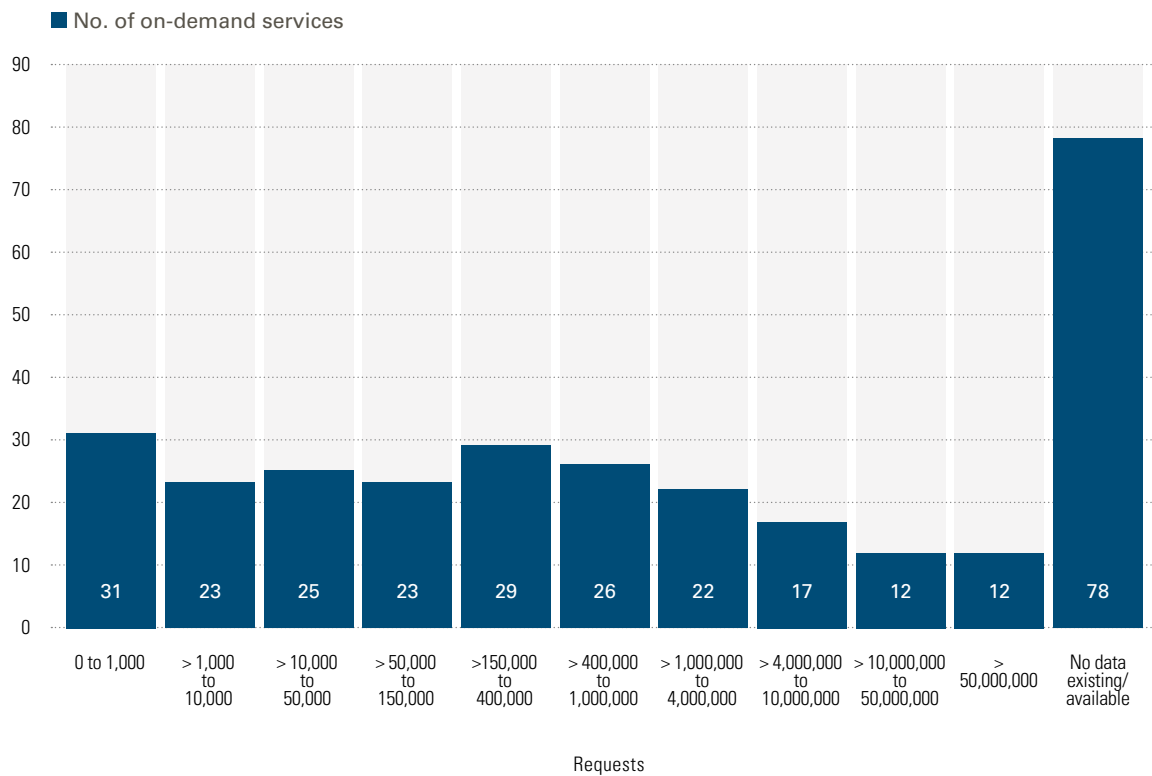
For the group of on-demand services, the questions related to the number of users (subscribers or individual customers) as well as to service requests. As above for television channels, the figures that are reported here are also divided into ranges and displayed as a bar chart.

Figure 03: Number of users (subscribers or individual customers) of on-demand services in 2023 within specified ranges



Referring to the chart above, the numbers of users (subscribers or individual customers) in 2022 were as follows:

- 0: 45
- Over 0 and up to 500: 21
- Over 500 and up to 2,000: 28
- Over 2,000 and up to 10,000: 35
- Over 10,000 and up to 50,000: 33
- Over 50,000 and up to 150,000: 28
- Over 150,000 and up to 1 million: 21
- Over 1 million: 13
- No data existing/available 68

Figure 04: Number of service requests in 2023 within specified ranges


Referring to the chart above, the numbers of requests in 2022 were as follows:

- 0 to 1,000: 26
- Over 1,000 and up to 10,000: 28
- Over 10,000 and up to 50,000: 26
- Over 50,000 and up to 150,000: 28
- Over 150,000 and up to 400,000: 38
- Over 400,000 and up to 1 million: 28
- Over 1 million and up to 4 million: 26
- Over 4 million and up to 10 million: 9
- Over 10 million and up to 50 million: 13
- Over 50 million: 13
- No data existing/available 57

2.3 Radio stations

Daily reach and market shares were surveyed in the radio station category. The bar chart shows the daily reach and market shares as 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 2023 (no data available for 55 providers)

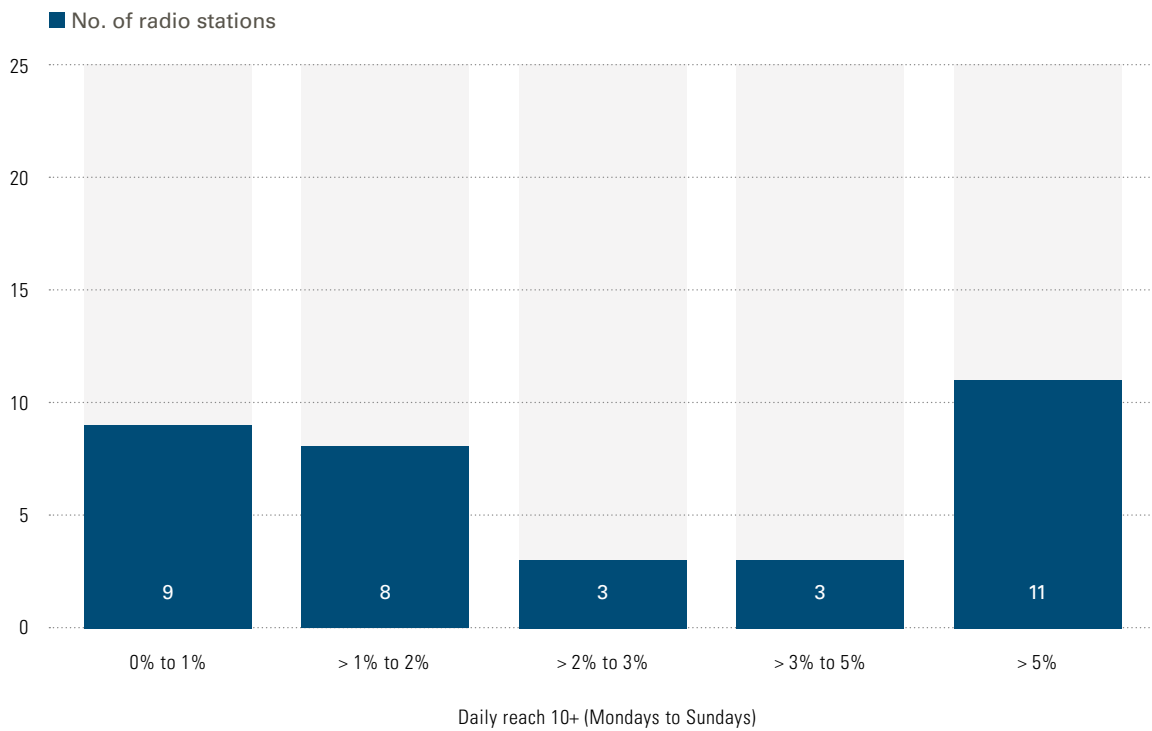
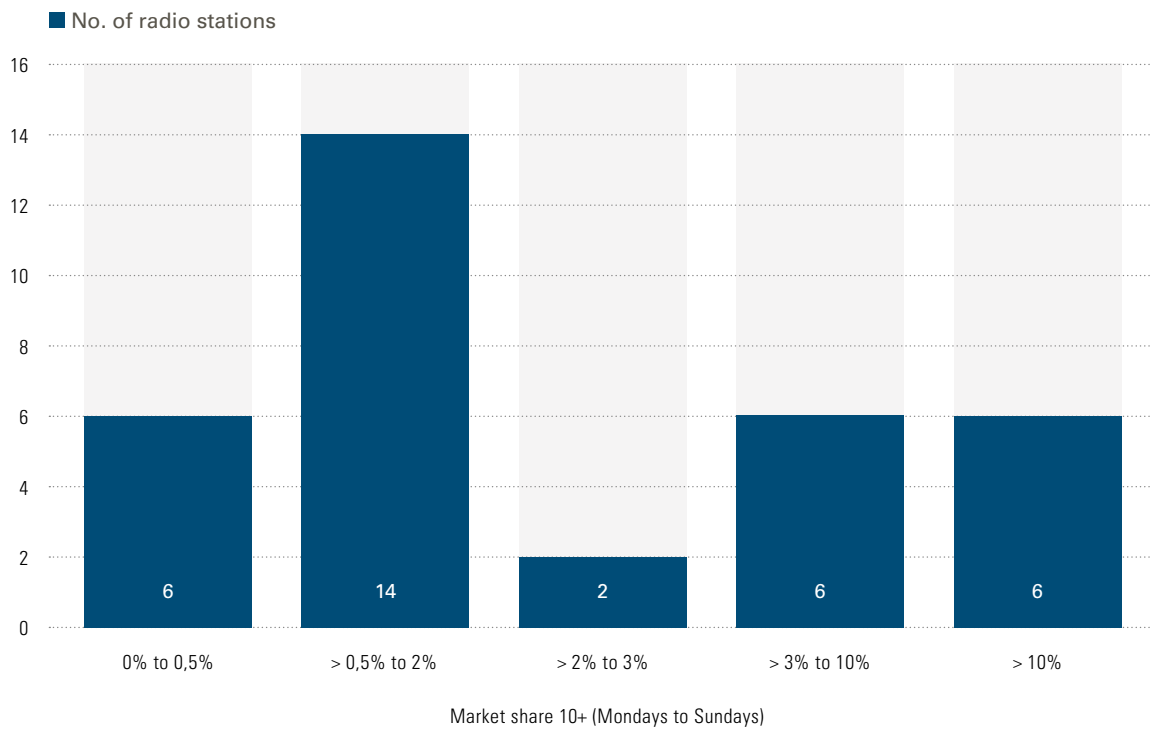


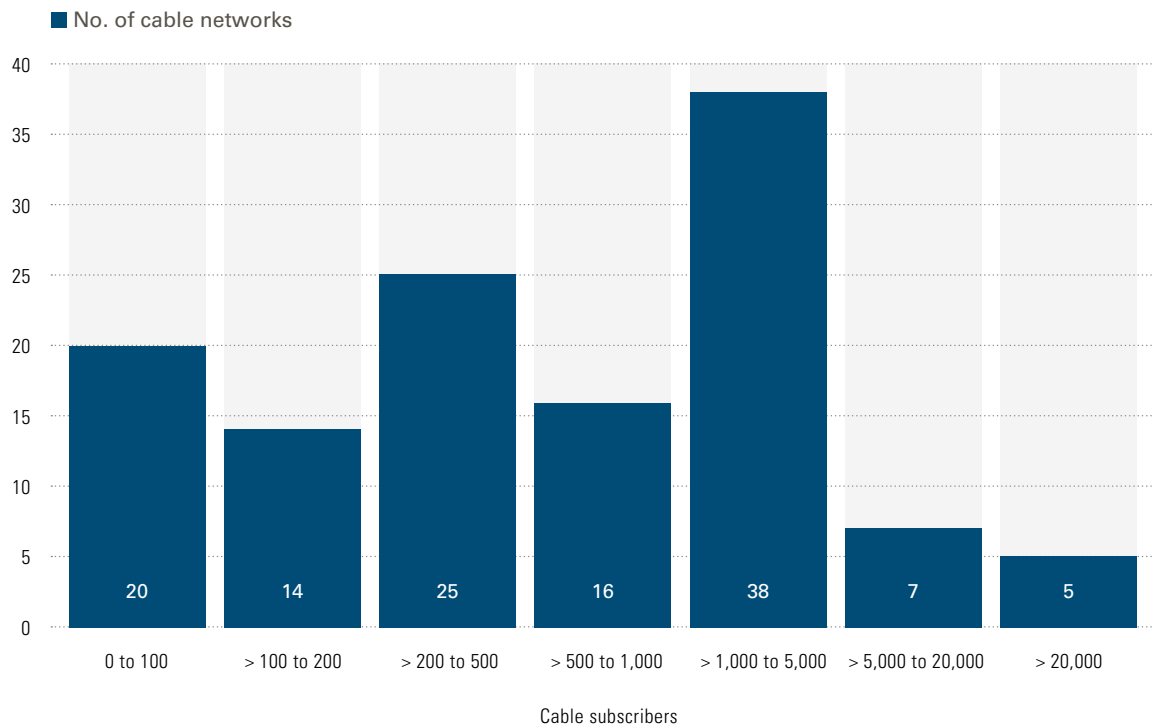
Figure 06: Number of radio stations within specified market share ranges among listeners 10+ in 2023 (no data available for 55 providers)



2.4 Cable networks

For cable networks, the number of subscriptions was queried. 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 2023



3. Selected detailed results

In addition, survey results were singled out from the various areas by way of example. These are presented here for 2023 as a whole. 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 2023

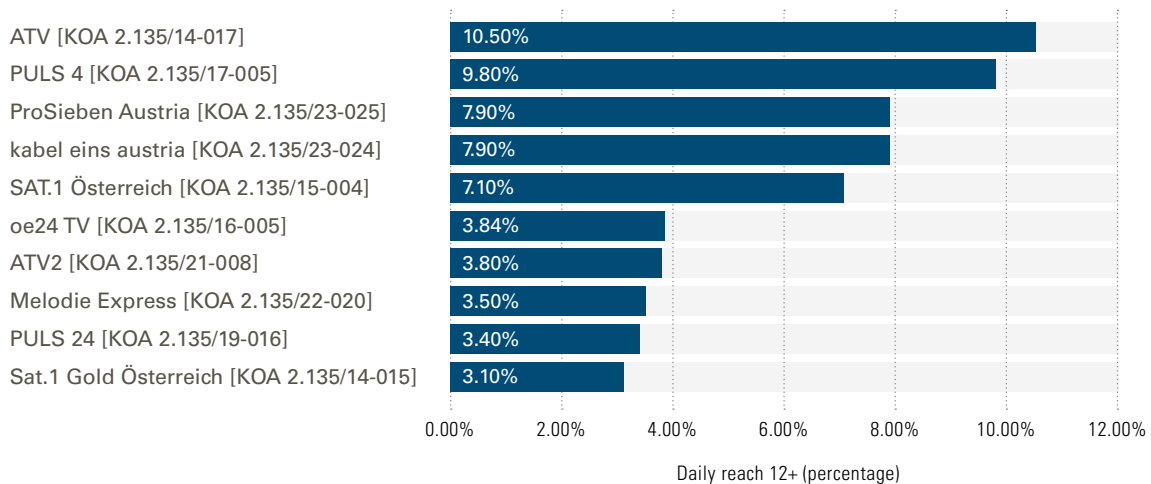


Figure 09: Top 10 on-demand services by number of users (subscribers or individual customers) in 2023

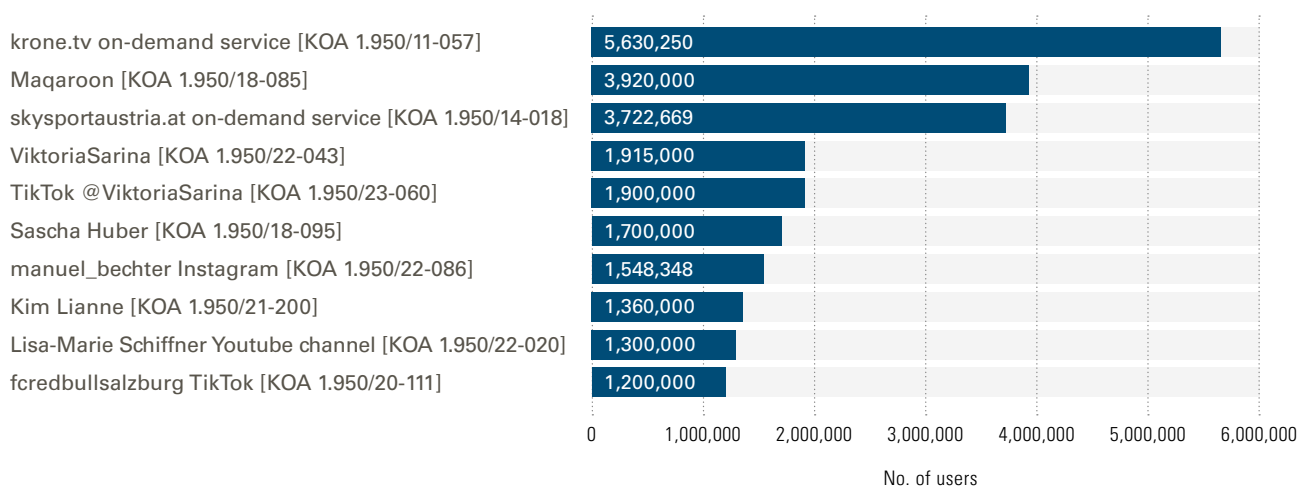


Figure 10: Top 10 on-demand services by service requests in 2023

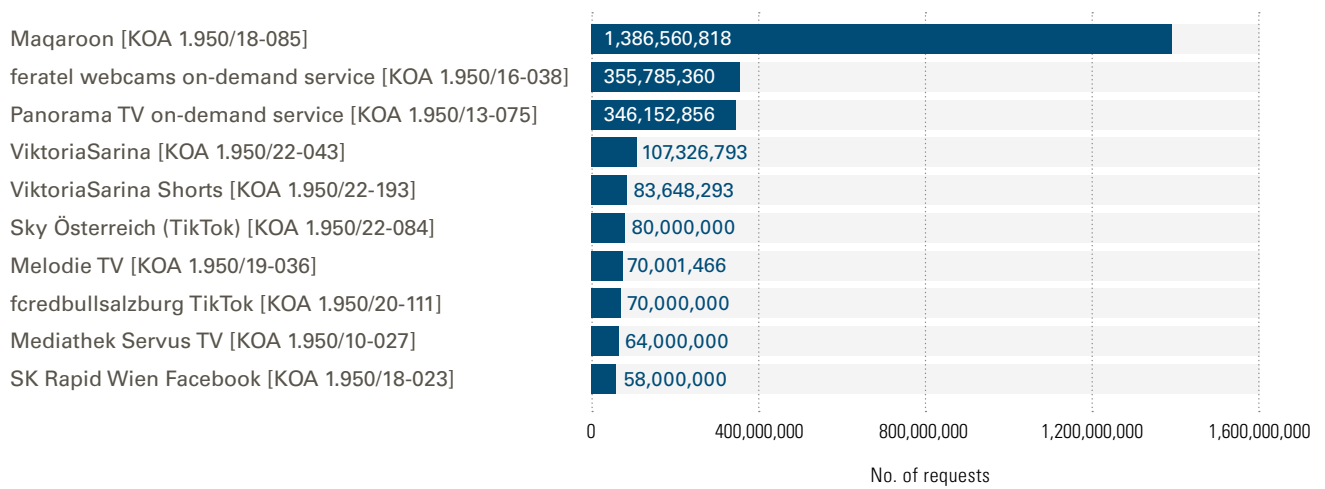


Figure 11: Percentage share of users (subscribers or individual customers) of the top 10 on-demand services compared with the share of users (subscribers or individual customers) of other on-demand services in 2023

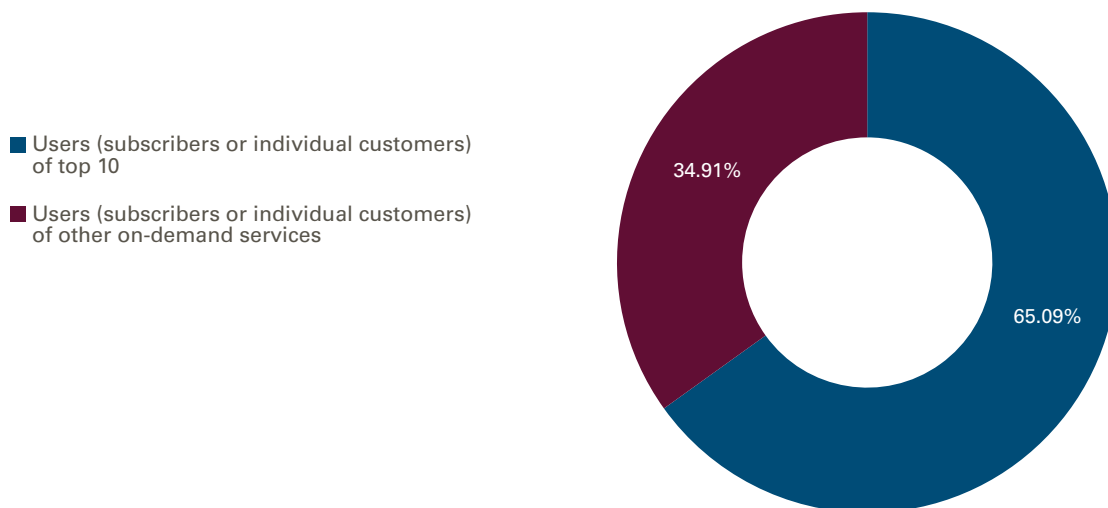
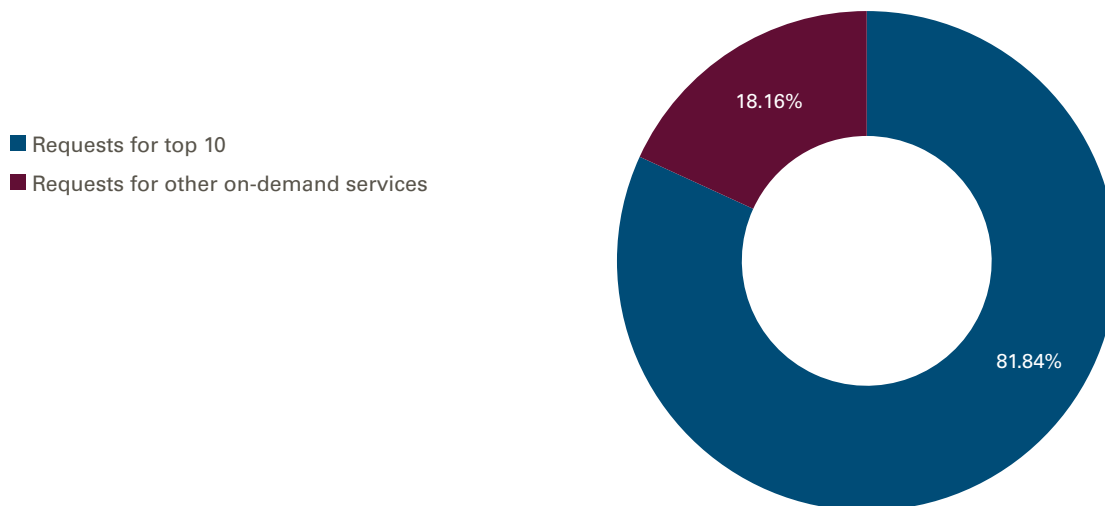


Figure 12: Percentage share of service requests to the top 10 on-demand services compared with requests to other on-demand services in 2023



4. Link to the overall survey results

All survey results for the categories of television and on-demand services are available (in German) on the RTR website at <https://www.rtr.at/Reichweiten-undMarktanteilerhebung2023>.

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 given directly by the service providers, while the data relating to reach and market shares in particular refer to the particular service provider's coverage area.

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(Rundfunk und Telekom Regulierungs-GmbH)
Mariahilfer Strasse 77-79, 1060 Vienna, Austria
t: +43 (0)1 58058-0; m: rtr@rtr.at
www.rtr.at

Responsible for content

Wolfgang Struber (Managing Director Media Division)
Austrian Regulatory Authority for Broadcasting and Telecommunications

Conceptual design and text

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cibus Kreativagentur

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Kommunikationsbehörde Austria (KommAustria)

Mariahilfer Strasse 77–79 | 1060 Vienna | Austria
t: +43 1 58058-0 | m: rtr@rtr.at | DVR-Nr.: 4009878
www.rtr.at