

Terrestrial broadcast network infrastructures in Europe: still solid in four countries

The cost of DTT ranges from €1.6 to €2.9 per household per month in major European countries

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Terrestrial broadcast network infrastructure operators in Europe have garnered revenues reaching approximately €2.2 billion for TV and radio transmission in 2020, a stable amount compared to previous years. The result excludes revenues from diversifications in OTT, telecommunications and IoT. Following Dataxis' latest research, revenues are expected to remain essentially flat up to 2026.

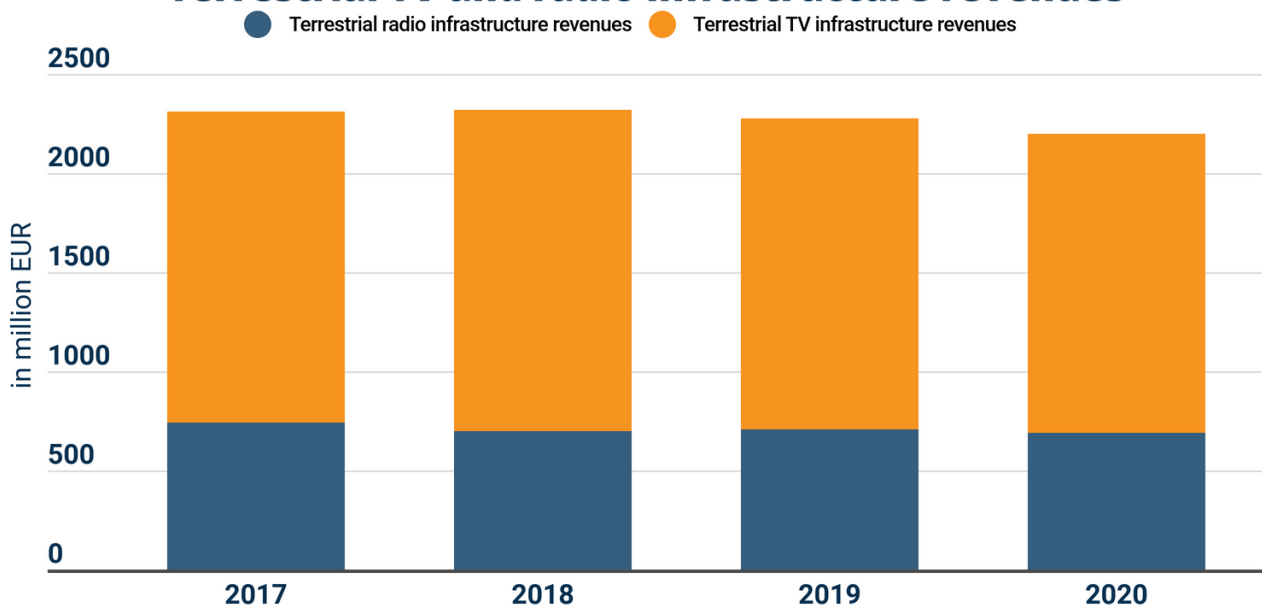
Terrestrial radio infrastructure

The FM and DAB transmission services paid by radio broadcasters to network infrastructure service providers amounted to €690 million in 2020, or 6% of the €11 billion revenues generated in total by the European radio industry in 2019, the last regular year for the sector. In 2020, the European radio industry revenues decreased by 8% to €10.2 billion due to the impact of the COVID-19 pandemic on radio advertising markets. This percentage varies depending on the country, and ranges from 11% in France to 8% in the UK for instance.

Terrestrial TV infrastructure

Digital terrestrial television (DTT) transmission revenues exceeded €1.5 billion in 2020. In Europe, DTT access is widespread in only four countries, which consequently represent two-third of the transmission market: the UK, France, Spain and Italy.

Terrestrial TV and radio infrastructure revenues



SOURCE: Dataxis ©

Perspective for DTT

At the end of 2020, the share of households relying solely on digital terrestrial TV for their main TV set reached 59.4% in Spain, 58.5% in Italy, 32.3% in the UK, and only 21.5% in France.

Besides, in this latter country the figure includes 1.4% of households receiving a pay DTT service via Canal+ offer, that is, less than 400.000 subscribers at the end of 2020. The share of DTT-only FTA households is therefore closer to 20% of TV households in France. The French TV broadcasters, essentially France Televisions, TF1, M6 and Canal+, spend around €125 million per year to terrestrial networks TDF and Towercast to reach a decreasing number of households, mostly located in rural areas and often retired. This cost currently represents €1.9 per month and per DTT-only FTA household in the country, while in the UK it reaches €2.4, in Italy €2.85 and in Spain €1.6. In these three last countries the size of the DTT offer is substantially larger than in France, as numerous local and regional TV channels are accessible for free on top of national broadcasters.

Dataxis just released a new module dedicated to infrastructures and covering terrestrial broadcast networks infrastructure revenues, independent tower companies revenues and satellite infrastructure (fixed and mobile satellite revenues, internet satellite subscribers and satellite platforms capacities).

Sa Eva **Nébié** | Head of research

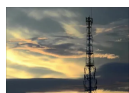
NEW RESEARCH MODULE

Infrastructure

Market intelligence services



Satellite infrastructure
Market intelligence services



Telecom infrastructure
Market intelligence services



Other market intelligence services