Observatory

on South Mediterranean Television Markets

· *work-in-progress*

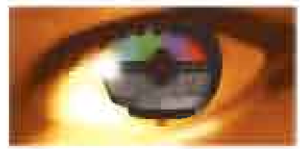
(provisional statistical data)

11th Permanent Conference

of Mediterranean Audiovisual Operators

Perpignan
May 1-3, 2004

Co.Pe.A.M.



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in collaboration with the Istituto italiano per l'Industria Culturale - IsICult - www.isicult.it

OBJECTIVES OF THE OBSERVATORY

OBJECTIVES OF THIS DOCUMENT

This report sets itself two objectives:

1. to give an **overview**, through a previously unpublished and up-to-date set of informations and analyses, of the situation concerning the 13 states that we have by convention defined as “South Mediterranean”, focusing in particular on the characteristics of the media markets and on television;

2. to highlight the necessity of a steady, permanent provision of analyses and monitoring of this area, with the aim of promoting the best possible reciprocal awareness to therefore stimulate cultural and commercial exchange: these are the founding reasons of the **Observatory on South Mediterranean Television Markets**, of which this report is intended simply as a preliminary exploration.

The Observatory on South Mediterranean Television Markets has been promoted by the Marketing Direction of Rai and assigned to the Istituto italiano per l’Industria Culturale (IsICult), which for Rai already carries out an Observatory on Public Service Broadcasting in Europe (an extract of the research findings is soon to be published by the British Screen Digest Ltd.).

THE STRUCTURE OF THE DOCUMENT

This document (aimed at a presentation at the Copeam Conference, May 1-3, 2004 in Perpignan), is structured in 3 parts, preceded by a methodological introduction and a general introduction:

- general scenario
- data relative to the 13 states + appendix on pan-Arab TV
- conclusions: the “work-in-progress” of the Observatory.

We remark on the experimental peculiarity of this informational and statistical data collection. We sincerely apologize for any uncorrect information and would be grateful for any kind of rectification or suggestion (info@isicult.it).

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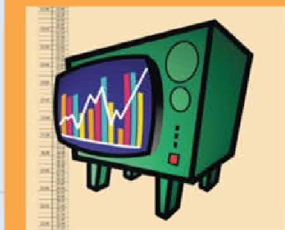

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A methodological introduction: overcome the "no data"

A discouraging lack of informations and reliable sources, an incredible repitition of the stock phrase "data not available" and, even more worrying, an unequivocal "**no data**": this is the conclusion reached by the analyst, the researcher or the statistician that wishes to study television in the 13 states that are here examined chiefly from the structural point of view (law, economy, technology…). A confirmation of this situation comes from a series of observations on various institutional or entrepreneurial fronts at an international level:

- the latest edition of the "Unesco Yearbook" dates back to 1999, thus one lacks an instrument that for decades had also proved valuable in analysing medium to longterm trends; most of the information logged on the Unesco Institute for Statistics database have not been updated since the year 2000;
- an accurate research report such as the recent "Arab Human Development Report 2003", carried out by the United Nations Development Programme (Undp), uses euphemisms such as "the second half of the 1990s" when referring to data on cinema-going;
- though all the 13 nations studied are associated with the European Broadcasting Union, the most recent edition of "Ebu Members' Company Profiles" (February 2004), edited by Strategic Information Service (Sis) of the Ebu, provides incomplete and fragmented data on public television on only 7 states (Algeria, Cyprus, Israel, Libya, Malta, Morocco, Turkey);
- research reports of institutes specialised at an international level, on the 13 states here studied, completely ignore the virtual totality of the states, at least at a level of essential quantitative data:
    - Zenith Optimedia, in the latest edition of its "Media Facts" (2003), dedicated to Africa and the Middle East, examines only 16 states and for these supplies data (updated to 2001) concerning only 2 among the 13 here studied (Israel and Lebanon);
    - the current edition of "World Advertising Trends" (2002), edited by the World Advertising Research Center reports estimates (revised to 2000) and examines only 11 states of the Arabian Peninsula, of which only 4 of those that here stand out (Egypt, Jordan, Lebanon, Syria), and a further 4 outside the Peninsula (Cyprus, Israel, Malta, Turkey)…
    - Television Business International, the most widely read yearbook amongst professionals in the broadcasting industry worldwide, in its current edition (2004) does not provide any assessment on the advertising investments in the 13 states here studied…

The reasons behind these veritable "black holes" of media knowledge are several: a certain "self-referencing" by some television networks (often still in a monopolistic market) that do not adopt suitable measures to promote detailed information on their own editorial and communication policies, beginning from objective limits (for example, many sites of numerous Tv networks are in Arab without any sections translated into either English or French); a substantial disinterest on the part of the majors and international multimedia groups (including the leading media centres of advertising agencies, that are often – throughout the rest of the world – real goldmines of information for the media expert), as regards these "markets" that appear to them to be difficult and minor in comparison.

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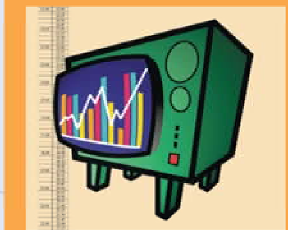

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A general introduction: transnational Arab culture

Bearing in mind that most of the 13 states that we are examining here can be considered to all effects as “Arab” (apart from of course Turkey, Cyprus, Israel and Malta), it is undoubtedly **the language** that acts as a bonding factor, also through television transmissions.

The Arab language is spread even wider by satellite television, **across-the-border** by definition. Satellite technology for the last twenty years (the first, **Arabsat**, launched in 1985, was described as “the highest muezzin in the world” though **Mbc**, the first pan-Arab channel via satellite, dates back to 1991) has enabled Arab culture to establish its own transnationality and to consolidate the mosaic of various national cultures towards a “unity of vision”, through a reinforcing of the diffusion of a common Arab language.

Effectively, national “frontiers” that can serve to limit or regulate the circulation of audiovisual products within the Arab markets now no longer exist – save the occasional attempt to contain the spread of satellite broadcasting through, for example, the “dish ban”, and of some persisting attempt to curb by government (in the importation of products destined for use in movie theatres, for instance)

Transnationality has also often been personified by the “secondary channels” of almost all the Arab public networks, which also function often as vehicles for French or English-language programming.

During the 1990s, with the birth of three major across-the-border Arab and pan-European networks (all of Saudi origin: **Mbc** since 1991, **Art** since 1993 and **Orbit** since 1994), the entire Arab world became a veritable “target” in the classic sense.

The organisational model for television broadcasting of the states analyzed by the Observatory on South Mediterranean Television Markets is of the **governmental type**, with an active role (and at times constrictive, at least as regards free-trade dynamics) played by the Government in the control of airwaves, but technological advances (ever-decreasing costs in satellite tv) and the dynamics of the marketplace (the appeal of **250 million Arab-speaking people** that attracts businessmen within the world television community) are determining a continual and now unrestrainable dismantling of protective barriers.

From a different perspective, the existing barriers imposed by other states are also destined to vanish: the Usa tend not to export films to countries such as Iraq and Libya as a form of sanction, claiming – beyond political and idealogical reasons – a lack of suitably modern movie theatres. These “**no-go-zones**” are slowly disappearing (for example, in 2001, Syria saw the end of a two-year embargo), and in any case the great melting pot of television broadcasting, with over 1,000 satellite channels, and the convergence of the Internet with Tv (with hundreds of Web TV stations on the Net) it will soon no longer be possible to impose forms of restrictions on the free flow of audiovisual products between East and West or the northern and southern hemispheres.

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GENERAL SCENARIO

Examined as a whole, the 13 states add up to a population of a good 245 million people, but of only 47 million tv households, and this datum already highlights the generally low level of tv penetration: just 24 television sets per 100 inhabitants, against the 66 in the 15 European Union states, but with a variation that ranges from the negative record of Syria (7 sets for every 100 inhabitants) and Jordan (8.4), to the positive record of Malta (55.6) and Turkey (44.9).
However, although these 13 states, examined as a whole, are still very distant from the television economy that characterizes the 15 states of the European Union, it is interesting to note how the gap between the two regions – at least within this sector - is closing: analysing the situation over a medium to longterm period, the distances tend to shorten. One observes how, in 1980, the tv penetration of these states corresponded to around 7 per 100, compared to that of the Eu (9.7 million television sets against 133.3 million); by 1990, the ratio had increased to 17 per cent, and in the year 2000 it reached 26 per 100: 59 million television sets operative in the 13 South Mediterranean states, against the 232 million of the European Union.

An effective indicator of the economic strength of the media system is given by the so-called “spending per-capita”, or the theoretical value that derives from the relation between the total advertising investments and the population of a state. In the South Mediterranean states spending per-capita oscillates between the peak of Israel’s 118 dollars and the 0.4 dollars of Syria, with the midway 64 dollars of Lebanon (not by chance, one of the most varied in television) and the 10 dollars of Jordan… Turkey itself, “European” aspirant, shows an interesting level of advertising revenues (715 million euros) but spending per-capita is only 10 dollars a year, and in fact the total value of its investments is not far off that of Israel (746 million), but Turkey has 70 million inhabitants against the 6.3 million of Israel…

All the statistical indicators highlight, however, a correlation between national wealth, the level of diffusion of technologies and cultural consumption.

From a purely quantitative analysis, it can be observed that in the 13 states examined there are 50 national tv channels on the airwaves, of which half are public and half are of private ownership. The public monopolies – those that have resisted – are constantly under attack from across-the-border broadcasters, and the diffusion of the multi-channel at times reaches peaks that are superior to those of the more developed European countries (95 % in Algeria, 81 % in Israel, 50 % in Palestine).

The number of national but non-terrestrial television channels is considerable: **171 channels** (of which only 48 are public against 123 commercial), but concentrated in great part in only 3 states (78 in Turkey, 35 in Israel, 30 in Egypt). Turkey distinguishes itself for a flurry of local tv stations (230 in all), seeming to emulate the Italian and Spanish territories.

A note on the “new entrants”: in the summer of 2004, in Tunisia the monopoly on TV will also experience a seachange.

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<u>Below are 5 tables</u>, which provide a varied set of data, both quantitative and of a generalised socio-political nature, drawing on, as regards this second sphere, indications from impartial institutional subjects and qualified journalistic sources.

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SOUTH MEDITERRANEAN TV BROADCASTERS EXAMINED AS A WHOLE

Key:
- The year referred to is 2002, unless otherwise indicated;
- The symbol ".."indicates that the datum is not available.




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TV RECEIVERS PER 100 INHABITANTS (13 South Mediterranean States)

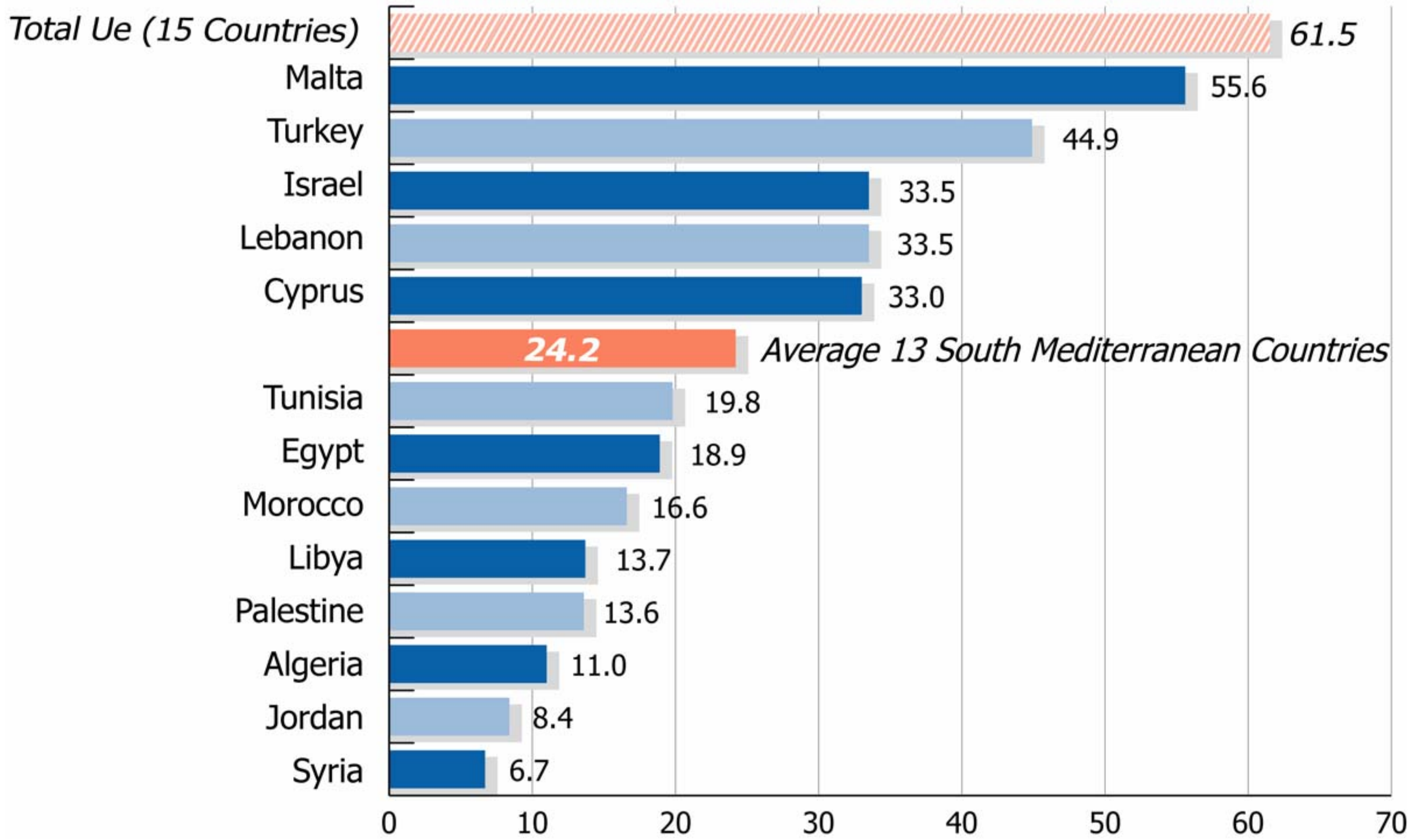

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Table 1 – TV in the South Mediterranean region: GENERAL TV SCENARIO *(States in alphabetical order)*

State (alphabetical order)	1980 N° television sets	1980 Population (millions)	1980 Tv sets X 100 inhabitants	1990 N° television sets	1990 Population (millions)	1990 Tv sets x 100 inhabitants	2000 N° television sets	2000 Population (millions)	2000 Tv sets x 100 inhabitants	2002 Tv households (millions)	2002 %
Algeria	975,000	18.7	5.2 %	1,840,000	24.9	7.4 %	3,333,000	30.3	11.0 %	4.5	*9.7*
Cyprus	85,000	0.6	13.9 %	215,000	0.7	31.6 %	262,000	0.8	33.0 %	0.2	*0.4*
Egypt	1,400,000	43.7	3.2 %	5,700,000	56.4	10.1 %	12,833,000	67.9	18.9 %	12.4	*26.6*
Israel	900,000	3.9	23.2 %	1,245,000	4.7	26.7 %	2,010,000	6.0	33.5 %	1.6	*3.4*
Jordan	172,000	2.9	5.9 %	315,000	4.6	6.8 %	412,000	4.9	8.4 %	0,7	*1,5*
Lebanon	750,000	2.7	28.1 %	880,000	2.6	34.4 %	1,172,000	3.5	33.5 %	0.8	*1.7*
Libya	186,000	3.0	6.1 %	435,000	4.4	9.9 %	726,000	5.3	13.7 %	0.8	*1.7*
Malta	202,000	0.3	62.3 %	255,000	0.4	72.0 %	220,000	0.4	55.6 %	0.1	*0.2*
Morocco	890,000	19.3	4.6 %	1,850,000	24.0	7.7 %	4,963,000	29.9	16.6 %	4.1	*8.8*
Palestine	-	-	-	-	-	-	427,000	3.1	13.6 %	0.4	*0.9*
Syria	385,000	8.7	4.4 %	740,000	12.3	6.0 %	1,085,000	16.2	6.7 %	2.8	*6.0*
Tunisia	300,000	6.4	4.7 %	625,000	8.1	7.7 %	1,881,000	9.5	19.8 %	1.8	*3.9*
Turkey	3,500,000	44.3	7.9 %	12,987.000	56.0	23.2 %	29,948,000	66.7	44.9 %	16.4	*35.2*
Total 13 States	**9,745,000**	**154.5**	**6.3 %**	**27,087,000**	**199.1**	**13.6 %**	**59,284,000**	**244.5**	**24.2 %**	**46.6**	*100 %*
Total Eu (15 States)	**133,295,000**	**355.3**	**37.5 %**	**161,506,00**	**365.2**	**44.2 %**	**231,899,000**	**377.0**	**61.5 %**	**158.4**	*340*

► Source: IslCult using various data (Unesco, Eao, Itu and others) for Rai – Direzione Marketing.

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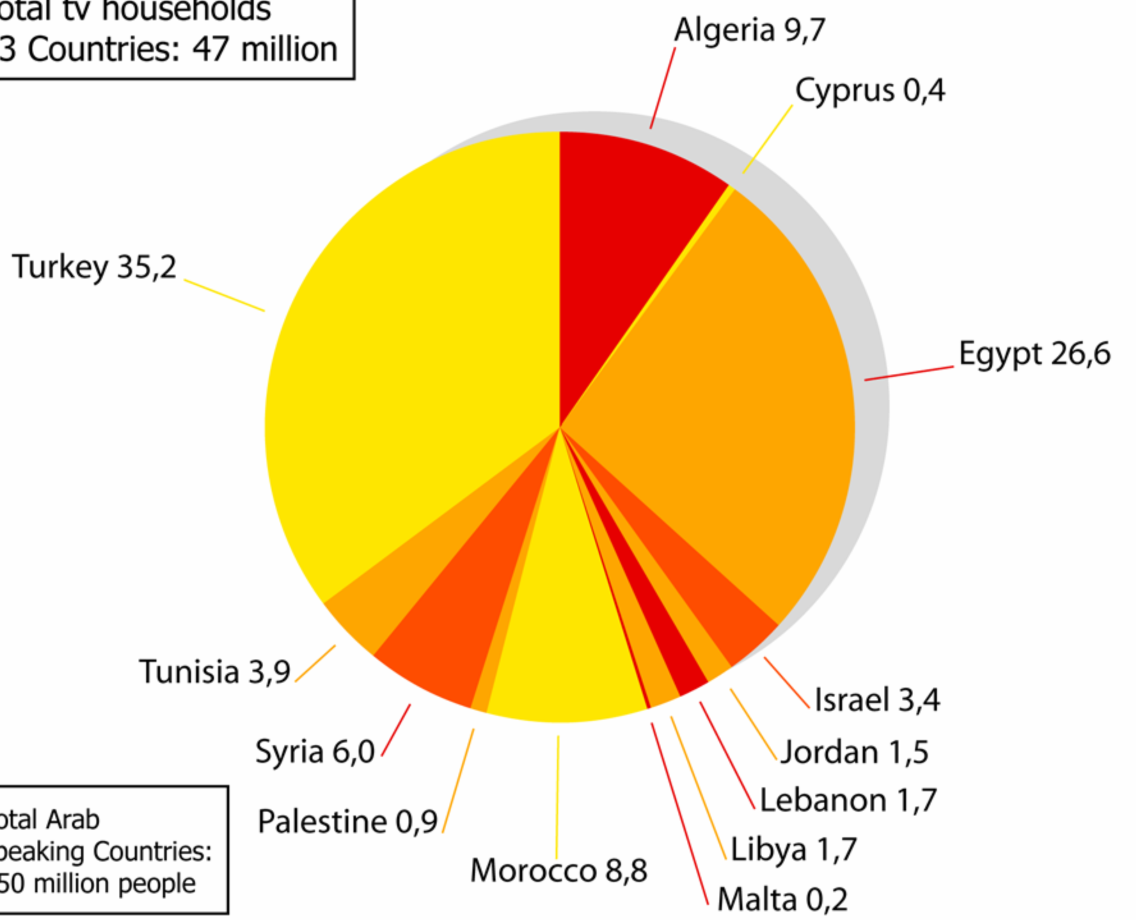
TV HOUSEHOLDS (%)

(in alphabetical order)

Total tv households
13 Countries: 47 million



Total Arab speaking Countries: 250 million people

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Table 2 – Tv in the South Mediterranean region: SOCIO-ECONOMICAL SCENARIO *(in alphabetical order)*

State	Population (millions)	Gross domestic product - Gdp (millions Us $)	Gdp per-capita (Us $)	Illiteracy (% on total pop.)	Languages	
					Official Language	*Other Languages*
Algeria	31.266	187,922	6,090	32	Arab 83%	Berber-Tamazight 17%, French
Cyprus	0.796	16,120	21,190	3	Greek 85.1% Turkish 11.7%	
Egypt	70.507	229,442	3,568	44	Arab	French, English
Jordan	5.329	19,491	3,870	10	Arab	English (60%)
Israel	6.300	125,900	19,790	5	Hebrew	Russian, Arab
Lebanon	3.596	18,282	4,170	14	Arab	French, English, Armenian
Libya	5.445	40,000	7,396	19	Arab	English, Italian
Malta	0.393	5,199	13,160	8	Maltese + English	Italian
Morocco	30.072	104,976	3,600	50	Arab 65%	Berber-Tamazight 33% French
Palestine	3.433	2,850	861	..	Arab	Hebrew
Syria	17.381	54,385	3,280	25	Arab	Kurdish, Aramaic, Armenian Circassian
Tunisia	9.728	61,862	6,390	28	Arab	French
Turkey	70.318	409,700	6,094	14	Turkish	Arab, Armenian, Kurdish, Greek

Notes: year refers to: population in 2002, gross domestic product and per-capita in 2001 (Gdp calculated with the World Bank "equal purchasing power" method).
► Source: IsICult data from various (United Nations, for population; Wb and Imf for Gdp; Unesco, for illiteracy; and others) for Rai – Direzione Marketing.

Table 3 – Tv in the South Mediterranean Region: MEDIA CONSUMPTION SCENARIO (A)

(A) ADVERTISING, CINEMA, VIDEO, RADIO, MUSIC

State	Population (millions)	Tv households (millions)	Advertising			Cinema		Video	Radio	Music
			Advertising Spend (millions Us$)	Advertising Spend per-capita (Us$)	Tv advertising revenues (millions Us$)	Admissions (millions)	Produced films	Vcr (millions)	Radio x 100 inhab.	Music: cd + mc (millions)
Algeria	31,3	4,5	..	..	.	0,6	.	..	24,4	..
Cyprus	0,8	0,2	..	..	44,1	1,1	1	..	41,7	..
Egypt	70,5	12,4	505,8	7,2	177,0	16,0	24	1,1	33,9	11,5 + 0,1
Israel	6,3	1,6	746,0	118,4	248,0	9,2	10	1,3	52,6	0,1 + 3,5
Jordan	5,3	0,7	54,6	10,3	11,3	.	.	..	37,2	..
Lebanon	3,6	0,8	231,9	64,4	111,3	2,5	.	0,5	68,7	1,2 + 0,3
Libya	5,5	*0,8*	..	..	.	2,9	-	..	27,3	..
Malta	0,4	0,1	..	..	.	1,1	..	..	66,6	..
Morocco	30,1	4,1	114,8	3,8	92,3	14,3	3	..	24,7	..
Palestine	3,4	0,4	..	0	..	..	..	..	..	..
Syria	17,4	2,8	6,5	0,4	5,4	3,9	1	..	27,6	..
Tunisia	9,7	1,8	..	0	..	.	2	..	15,8	..
Turkey	70,3	16,4	715,0	10,2	347,0	26,0	17	1,9	57,3	23,4 + 4,5
Total 13 States	**254,6**	46,6	(2.374,6)	9,3	(1.036,4)	(77,6)	(58)	(4,8)	..	36,2 + 8,4

Notes: the year referred to is 2002, unless otherwise indicated: advertising investments: in 2003 (Cyprus, Israele, Jordan, Lebanon), in 2000 (Morocco), in 1999 (Syria, and Egypt for televisior only); cinema: in 2002 (Algeria and Morocco 1997, Libya 1999, Syria 1993); books published: in 1999 (Egypt, Lebanon, Malta and Palestine 1998, Jordan 1996, Libya 1994, Syria 1992);dailies anc publishing: in 2000; column total is indicated in brackets, when the result of the sum of the only data available.

► Source: IsICult using various data (United Nations, Ocse, Imf, Unesco, Mpa and others) for Rai – Direzione Marketing.

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Table 3 – TV in the South Mediterranean region: MEDIA CONSUMPTION SCENARIO (B)

(B) PRESS, PUBLISHING, TELEPHONY, COMPUTERS, INTERNET

State	Population (millions)	Tv households (millions)	Press		Publishing	Telephony		Computers and Internet	
			Dailies (x 100 inhabs.)	Dailies: circulation (million copies)	Books published	Telephones (x 100 inhabs.) Fixed	Telephones (x 100 inhabs.) Cellular	PC (x 100 inhabs.)	Internet (x 100 inhabs.)
Algeria	31.3	4.5	2.7	1.1	133	6.0	0.3	0.7	0.2
Cyprus	0.8	0.2	11.1	1.0	931	64.2	45.6	28.0	22.1
Egypt	70.5	12.4	3.5	2.4	1,410	10.3	4.3	1.5	0.9
Israel	6.3	1.6	29.0	..	1,969	47.6	80.8	24.6	23.0
Jordan	5.3	0.7	7.7	0.3	511	12.7	16.7	3.3	4.0
Lebanon	3.6	0.8	10.7	0.3	289	19.5	21.2	5.6	8.6
Libya	5.5	*0.8*	1.5	0.1	26	10.9	0.9	..	0.4
Malta	0.4	0.1	..	..	237	53.0	35.4	23.0	25.3
Morocco	30.1	4.1	2.8	0.8	386	3.9	15.7	1.3	1.3
Palestine	3.4	0.4	..	..	2	..	..	..	1.8
Syria	17.4	2.8	2.0	0.3	598	10.9	1.2	1.6	0.4
Tunisia	9.7	1.8	1.9	0.2	1,260	17.5	0.6	2.4	4.1
Turkey	70.3	16.4	11.1	..	2,920	28.5	30.2	11.9	9.1
Total 13 States	**254.6**	46.6	..	6.5	10,672	..	..	..	..

Note: the year referred to is 2002, unless otherwise indicated: advertising investments: in 2003 (Cyprus, Israel, Jordan, Lebanon), in 2000 (Morocco), in 1999 (Syria, and Egypt for television only) cinema: in 2002 (Algeria and Morocco 1997, Libya 1999, Syria 1993); books published: in 1999 (Egypt, Lebanon, Malta and Palestine 1998, Jordan 1996, Libya 1994, Syria 1992); dailies anc publishing: in 2000; column total is indicated in brackets, when the result of the sum of the only data available.

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Table 4 – Tv in the South Mediterranean region: TV BROADCASTERS SCENARIO: MACRO-INDICATORS *(States)*

State	National *terrestrial* channels			National *cable-satellite* channels						*Regional + local channels*	Multichannel penetration (% on total Tv households)
	Total	Public	Private	Total	Public	Private	*of which: original TV channels*				
							Total	*Public*	*Private*		
Algeria	1	1	-	3	3	-	2	2	-	-	95.4
Cyprus	7	2	5	8	1	7	5	1	4	6	28.5
Egypt	4	4	-	30	23	7	21	14	7	6	7.2
Israel	3	1	2	35	4	31	32	2	30	-	81.2
Jordan	3	3	-	1	1	-	1	1	-	-	42.8
Lebanon	5	1	4	7	1	6	2	-	2	-	70.6
Libya	1	1	-	1	1	-	-	-	-	-	8.6
Malta	4	1	3	3	2	1	3	2	1	-	84.8
Morocco	2	2	-	2	2	-	-	-	-	-	29.7
Palestine	1	1	-	1	1	-	-	-	-	17	50.2
Syria	2	2	-	1	1	-	1	1	-	-	42.9
Tunisia	3	2	1	1	1	-	-	-	-	-	33.4
Turkey	14	5	9	78	7	71	65	2	63	229	32.3
Total 13 States	**50**	**26**	**24**	**171**	**48**	**123**	*132*	*25*	*107*	**258**	..

Note: the year referred to is 2002.
► Source: IsICult using various data (Tbi, Screen Digest, Ebu, Eutelsat, *et alii*) for RAI – Marketing Division.

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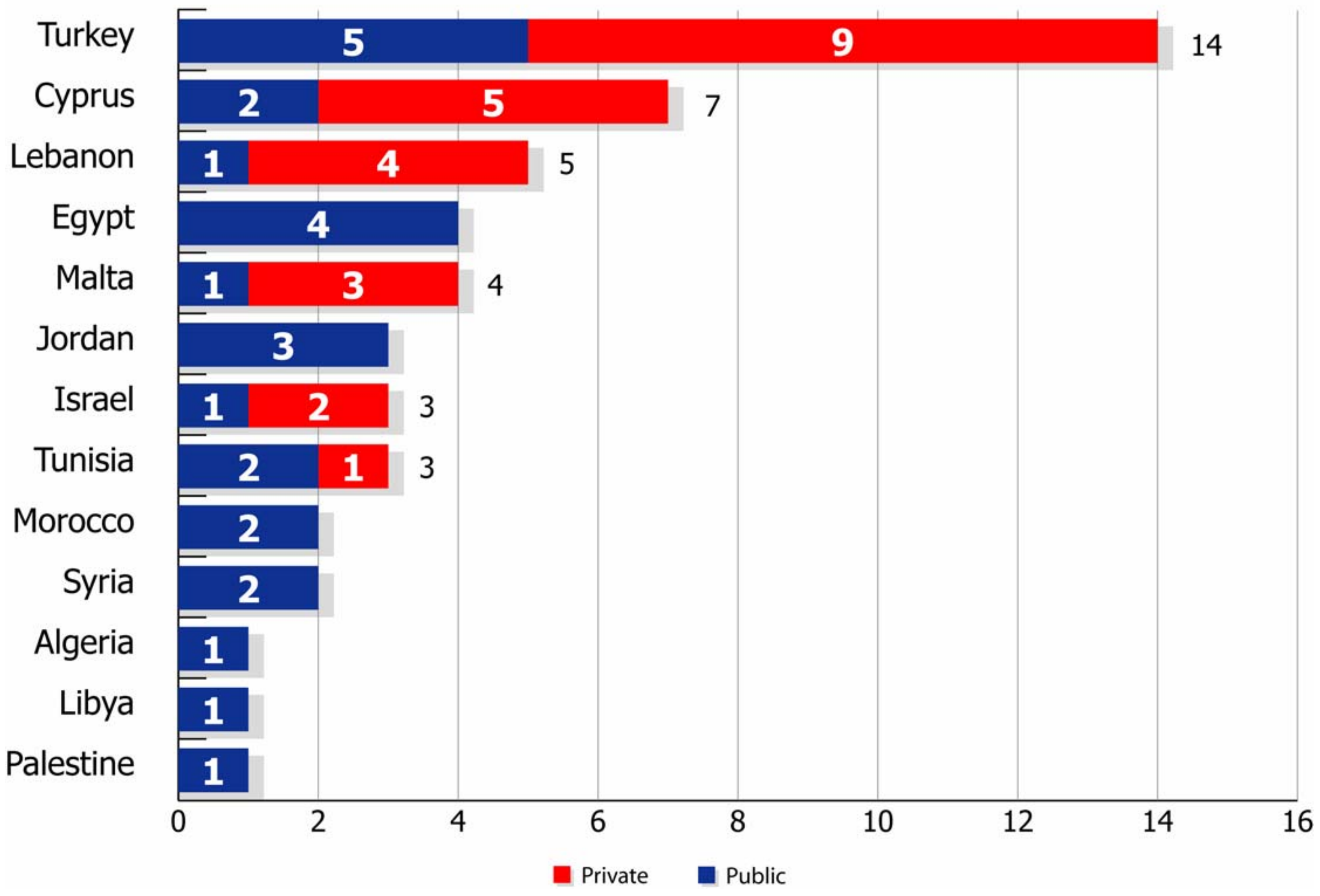
TUNISIA
TURKEY

GENERAL SCENARIO

Rai
Direzione Marketing Strategico




TERRESTRIAL CHANNELS (national coverage)



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GENERAL SCENARIO

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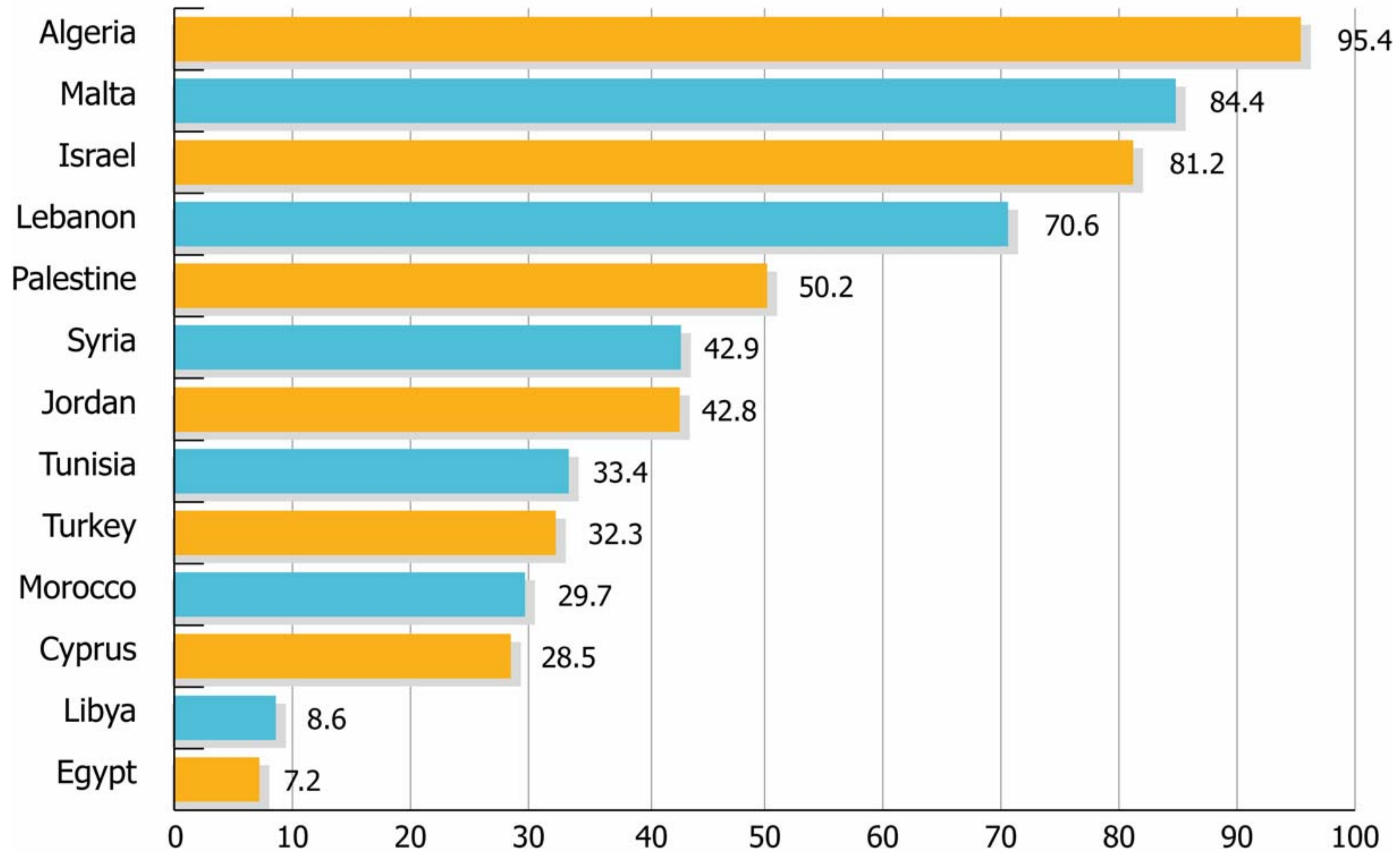
MULTI-CHANNEL PENETRATION

(% of total tv households)



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GENERAL SCENARIO

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Table 5 – Tv in the South Mediterranean region: TV BROADCASTERS SCENARIO: MACRO-INDICATORS *(Synthesis)*

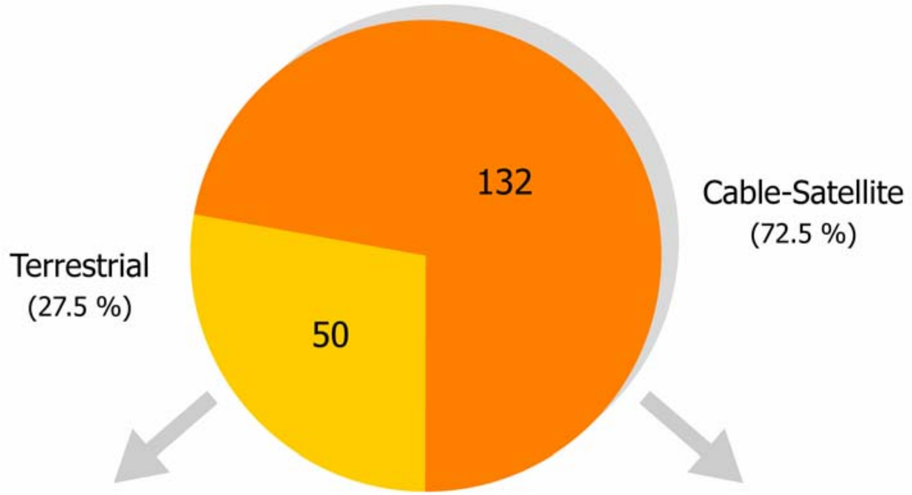
SOUTH MEDITERRANEAN TV BROADCASTERS EXAMINED AS A WHOLE

Television channels		Total	Public	Private	Quota % public	Quota % private
National *terrestrial*		50	26	24	52.0 %	48.0 %
National *cable-satellite*		171	48	123	28.1 %	71.9 %
- of which:	**channels** *original*	132	25	107	18.9 %	81.1 %
- of which:	**channels** *rebroadcast*	39	23	16	60.0 %	40.0 %
Regional **and** *local*		258	6	252	2.3 %	97.3 %

Note: the year referred to is 2002.
► Source: IsICult using various data (Tbi, Screen Digest, Ebu, and others) for Rai–Direzione Marketing.

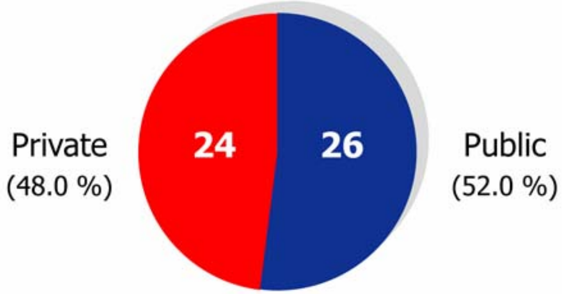
NATIONAL CHANNELS

(Terrestrial vs Cable-Satellite)



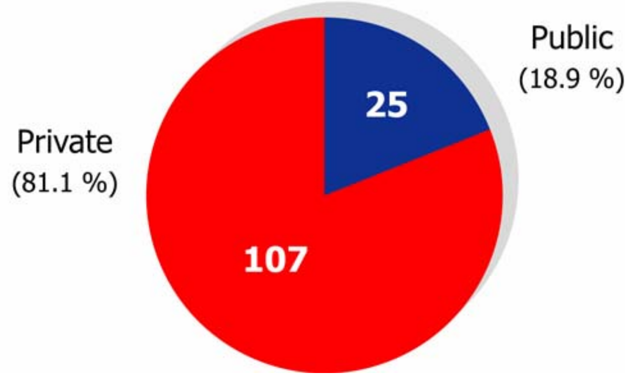
NATIONAL TERRESTRIAL CHANNELS

(Public vs Private)



NATIONAL CABLE-SATELLITE CHANNELS

(Public vs Private)



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