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Programming and Broadcasting Activities in Turkey

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1. CLASSIFICATIONS

1.1. Activity Classification

Broadcasting enterprises are classified in accordance with the Statistical Classification of Economic Activities in the European Community, NACE Rev.2.

- ✚ 60 - Programming and broadcasting activities
 - 6010 - Radio broadcasting
 - 6020 - Television programming and broadcasting activities

1.2. Classification According to Coverage

- ✚ **National broadcasting:** It provides the media services transmitted via terrestrial networks accessible to at least seventy percent of the national population and to the residential areas determined by the Radio and Television Supreme Council.
- ✚ **Regional broadcasting:** It provides the broadcasting services transmitted to the minimum seventy percent of the total population of the provinces in a geographical region and to the provinces in a geographical region determined by the Radio and Television Supreme Council.
- ✚ **Local broadcasting:** It provides the broadcasting service that is transmitted via terrestrial network into the territories of one province at most.
- ✚ **Broadcasting via cable:** A broadcasting institution which is responsible for the contents and arranges radio and television broadcast or to subscribers against fee and/or any of radio and/or television broadcasts given depending on demand to be broadcasted to public via cable.
- ✚ **Broadcasting via satellite:** A broadcasting institution which is responsible for the contents and arranges radio and television broadcast or any of radio and/or television broadcasts given to subscribers against fee to be transmitted to directly public via satellite platform and satellite.

1.3. Product Classification

Programme types are categorized according to aim and contents as follows:

- ✚ News
- ✚ Sports
- ✚ Culture
- ✚ Religious
- ✚ Education
- ✚ Information, entertainment
- ✚ Dramatic
- ✚ Music

- ✚ Entertainment
- ✚ Promotion of other programmes
- ✚ Advertisements
- ✚ Reality show
- ✚ Other

2. MARKET CHARACTERISTICS

Turkey has a rich and a very dynamic broadcasting sector, aware of the opportunities and challenges that the new media landscape will bring both to public and private broadcasters in preparing themselves to the digital age.

Turkey has a long tradition of Public Broadcasting. With the enactment of the “Wireless Installation Law” in 1925 first radio broadcasts began in Turkey. With the several adoptions of Constitutional changes, renewal and developments were witnessed in this field until 1971. On March 1971, television broadcast began under the scrutiny of (TRT) Turkish Radio Television Corporation which became an impartial, autonomous public corporate body.

The monopoly of the Turkish Radio and Television Corporation (TRT) on broadcasts stipulated in the Constitution was broken after 1990 by many private radio and television channels.

Table 1: Broadcasting market with numbers

TV Households: 18 million

TV Broadcasting: 329 companies

Radio Broadcasting: 796 companies

Digital Satellite Platforms: 2 companies, 3.99 million subscribers

Cable: 2 companies, 1.23 million subscribers

IPTV: 1 company, 176 thousand subscribers

Sources: Turkish Statistical Institute (TurkStat) - 2011,
Information and Communications Technologies Authority (ICTA) – 2013

The Radio and Television Supreme Council (RTÜK) was founded in 1994, as a competent regulatory authority, autonomous and impartial public legal person which determines the regulations to which both public and private radio and TV stations and channels are required to abide by.

Digitalisation, which provides an increase in the number of communication services, also provides a more competitive medium, mostly in favour of private broadcasters.

Major consequences of the technological developments in recent years are not only the introduction of the new transmission modes, cable, satellite, IPTV but also the increase in the number of television and radio channels which as a result brought about a competitive environment to the sector.

Table 2: Number of Broadcasting Enterprises According to Coverage

	Number of enterprises
National broadcasting	47
Regional broadcasting	73
Local broadcasting	880
Satellite, cable or internet broadcasting	125

Source: Turkish Statistical Institute (TurkStat) - 2011

Today a high number of private companies offer radio and television broadcasting. None of the major private television channels transmits radio programmes at the same time there is almost a clear distinction between the two media. Pay TV has already been established. There are encrypted channels on digital satellite platforms providing specialised programmes and their method of financing is based on viewer subscription. On the other hand private channels obtain their revenue basically from advertisements, TRT, Turkey's Public Broadcaster, however has a system of mixed funding they receive a proportionate share of revenue from television "banderoles" (registration fee for TV receivers), advertisements and other public sources.

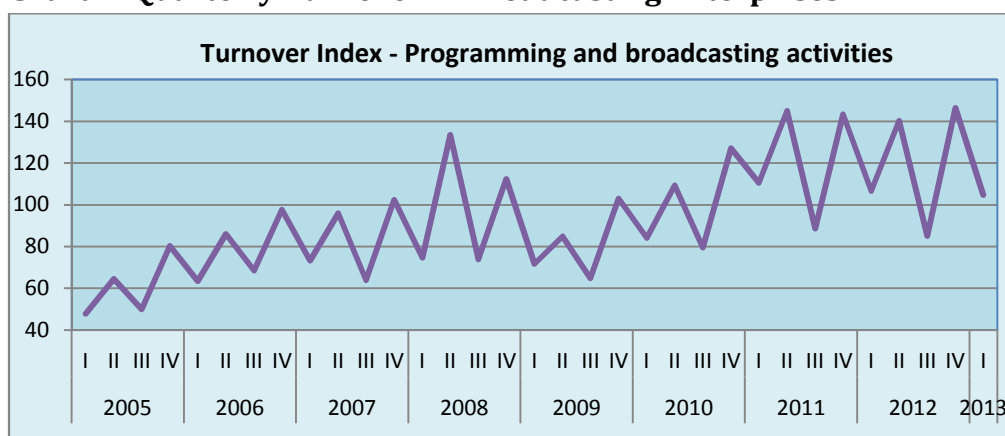
According to 2011 results, around 3.1 billion ₺ (~1.6 billion \$) is achieved annually in broadcasting sector.

Table 3: Turnover and Employment in Broadcasting Enterprises

	Number of enterprises	Employment	Turnover (₺)
Radio broadcasting	796	2 857	115 567 028
Television programming and broadcasting activities	329	15 876	2 965 616 087

Source: Turkish Statistical Institute (TurkStat) - 2011

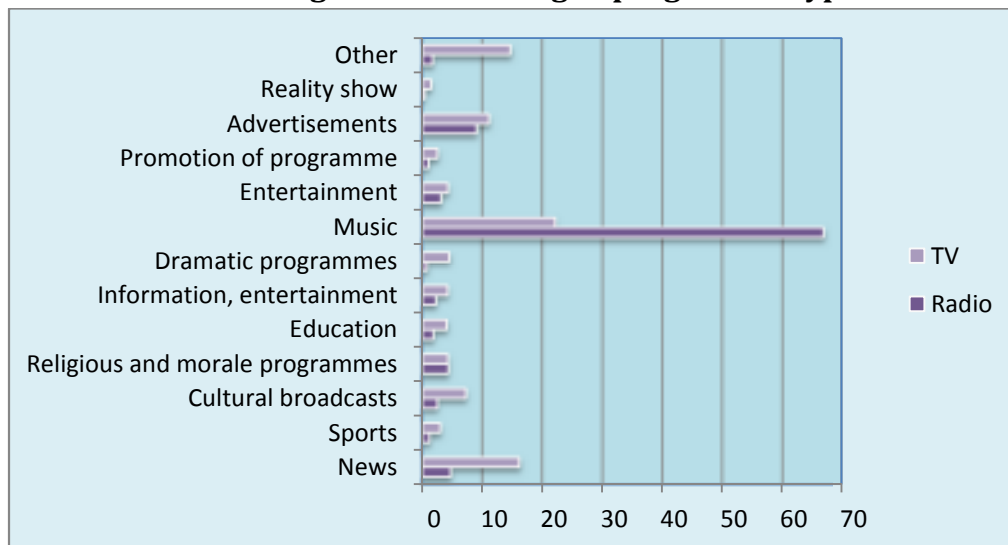
The quarterly distribution of this turnover is as follows.

Chart 1: Quarterly Turnover in Broadcasting Enterprises

Source: Turkish Statistical Institute (TurkStat) - 2013

The distribution of broadcasting times according to contents of the programmes is as follows.

Chart 2: Broadcasting times according to programme types



Source: Turkish Statistical Institute (TurkStat) - 2011

3. SURVEYS

3.1. Quarterly survey

Quarterly Trade and Services Survey is applied to enterprises of Broadcasting activity.

Sampling and full enumeration:

- + 50 or more employees → full enumeration
- + 5-49 employees → sample
- + 0-4 employees → sample

Threshold:

- + None

Data compiled in the survey:

- + Employment
 - Number of employees
 - Number of unpaid working proprietors (owners) and unpaid family workers
- + Hours worked in the reference period
- + Wages and salaries
 - Total of gross payments paid regularly every month to employees
 - Total of gross payments paid irregularly not every month to employees
 - Social security contribution of employer
 - Payment in lieu of notice and seniority allowance payments
- + Turnover

3.2. Annual Survey

The more detailed data is compiled with “Annual Radio and Television Institutions Survey”.

Sampling and full enumeration:

- ✚ Full enumeration

Threshold:

- ✚ None

Data compiled in the survey:

- ✚ Type of broadcasting
- ✚ Employment
 - Number of employees
 - Owners and partners
 - Unpaid family workers and apprentices
- ✚ Personnel costs
 - Total payments to employees
 - Social security costs
- ✚ Purchases of goods and services

- ✚ Broadcasting time
 - Type of programme
 - Source of programme production
- ✚ Gross investments
 - Gross investment in tangible goods
 - Gross investment in land
 - Gross investment in existing buildings and structures
 - Gross investment in machinery and equipment
 - Other gross investment in tangible goods
 - Gross investment in intangible goods
 - Computer software
 - Rights (concession, patent, license, brand etc.)
 - Other intangible assets
- ✚ Turnover
- ✚ Production value
- ✚ Value added at factor cost

4. DATA DISSEMINATION

4.1. Quarterly Results

The quarterly results are disseminated under “Trade and Services Indices” title.

http://www.turkstat.gov.tr/PreTablo.do?alt_id=1037

The following statistical tables are disseminated on the web site for the base year 2010:

- ✚ Trade and Services Seasonally and Calendar Adjusted Turnover Index and Percentage Changes
- ✚ Trade and Services Seasonally and Calendar Adjusted Employment Index and Percentage Changes
- ✚ Trade and Services Seasonally and Calendar Adjusted Hours Worked Index and Percentage Changes
- ✚ Trade and Services Seasonally and Calendar Adjusted Gross Wages-Salaries Index and Percentage Changes
- ✚ Trade and Services Indices

4.2. Annual Results

The quarterly results are disseminated under “Radio and Television Broadcasting Institution Statistics” title.

http://www.turkstat.gov.tr/PreTablo.do?alt_id=1038

- ✚ Basic Indicators on Local Units
- ✚ Employment and Personnel Cost by Economic Activity
- ✚ Some of Basic Indicators by Type of Broadcasting
- ✚ Characteristics of Employees by Economic Activity
- ✚ Basic Indicators by Economic Activity
- ✚ Gross Investment by Economic Activity
- ✚ Broadcasting Time by Type of Broadcasting and Type of Programmes
- ✚ Basic Indicators by Economic Activity and Size Classes