Audiovisual media in Europe: Localised, targeting and language offers

MAVISE

A publication
of the European Audiovisual Observatory

European Audiovisual Observatory

COUNCIL OF EUROPE
CONSEIL DE L'EUROPE

Audiovisual media in Europe: Localised, targeting and language offers
European Audiovisual Observatory (Council of Europe), Strasbourg, 2018

Director of publication
Susanne Nikoltchev, Executive Director
Editorial supervision
Gilles Fontaine, Head of Department for Market Information
Editor
Agnes Schneeberger
European Audiovisual Observatory

Author
Agnes Schneeberger
European Audiovisual Observatory

Proofreading
Anthony A. Mills

Translations
Sonja Schmidt, Anne-Lise Weidmann

Press and Public Relations
Alison Hindhaugh, Alison.hindhaugh@coe.int
European Audiovisual Observatory

Publisher
European Audiovisual Observatory
76 Allée de la Robertsau, 67000 Strasbourg, France
Tel.: +33 (0)3 90 21 60 00
Fax. : +33 (0)3 90 21 60 19
info.obs@coe.int
http://www.obs.coe.int

Cover layout – ALTRAN, Neuilly-sur-Seine, France

Please quote this publication as
Schneeberger A., *Audiovisual media in Europe: Localised, targeting and language offers*, European Audiovisual Observatory, Strasbourg, 2018

Audiovisual media in Europe:

Localised, targeting and language offers

Agnes Schneeberger

European Audiovisual Observatory

COUNCIL OF EUROPE

CONSEIL DE L'EUROPE

Table of contents

Figures

Tables

Executive summary

The following report provides an overview of the European audiovisual media landscape by looking at the origin of linear and pay-on-demand audiovisual services and their circulation through three complementary angles. The first focuses on localised services, reflecting a trend whereby an increasing number of services are adapted to different national markets either as TV channels in different linguistic versions or pay-on-demand services with local-language user-interfaces to increase viewership and subscriber numbers. The second angle looks at the impact that services specifically targeting other countries have on national licensing regimes. Typically, these tend to be delivered by a number of recently-emerged hubs from which broadcasters and on-demand service providers circulate these services to the respective target countries. The third angle highlights the consumer perspective, concentrating on the various broadcasting languages of TV channels available to viewers in their home countries in a reflection of the language diversity in European markets.

Localised audiovisual media services established in Europe

- Adapting a TV channel brand and on-demand service to local customs has become an integral part of the business strategies of many broadcasters and pay-on-demand service providers to increase viewership and subscriber numbers. It flags up the importance of the various cultural and language ecosystems in Europe and how media service providers respond to this diversity (pages 18ff).

- At the end of 2017, one third of all audiovisual media services established in the EU28 existed as localised versions, representing a substantial weight in the overall audiovisual market. The share among pay-on-demand services was somewhat higher (35%) than among television channels (32%). Over half of localised audiovisual media services were concentrated in just three countries: the United Kingdom, the Czech Republic and France accounted for 61% of localised TV channels while 53% of localised pay-on-demand services were based in the United Kingdom, the Netherlands and Sweden (pages 18ff).

- The United Kingdom plays an even greater part in the provision of localised services than it does for the overall supply of audiovisual services established in the EU28. Nearly half of all localised TV channels and over one quarter of localised pay-on-demand services were established in the United Kingdom, compared to nearly one third of all TV channels and one fifth of pay-on-demand services (pages 21ff).

- Genre concentration was generally higher among localised services than among audiovisual media established in the EU28 as a whole. The most popular genres among localised TV channels were film and TV fiction/series (26%); documentary (16%); children (15%); sport (15); entertainment (10%) and lifestyle/leisure/health/travel (8%). Localised pay-on-demand services were dominated by the two genres film and TV fiction/series, and generalist, with a combined aggregated share of 94% (pages 28ff).

- Localised audiovisual media services were more likely to be owned by large US media corporations than the average media service established in the EU28. Two thirds of EU-based service providers of localised TV channels and localised pay-on-demand services belonged to a US parent company. The share among TV channels was somewhat higher (68%) than that among pay-on-demand services (64%). The ratio of shares was reversed when looking at all audiovisual services established in the EU: services with US ownership made up one third, compared to two thirds with a European parent group (pages 33ff).

- Seven of the top 10 US groups offering localised television channels established in the EU28 also provided a significant number of localised pay-on-demand services (⩾10). By comparison, only two of the top European companies did so: Swedish companies Albert Bonnier and Kinnevik. While US groups offering localised services tend to be large vertically integrated media corporations with a diversified portfolio, European groups are likely to be horizontally integrated corporations with a tendency to focus on a single part of the industry value chain (pages 34ff).

- The top US groups offering the largest bouquets of localised television channels established in the EU28 were Discovery (161), Twenty-First Century Fox (136), AMC Networks (109) and Viacom (101). The top US groups providing the highest number of localised pay-on-demand services established in the EU28 included three major technology companies, with Amazon coming first (33), followed by Apple (25) in second and Netflix (18) in fourth place. European competitors offering localised TV channels included Swedish-based Kinnevik (122) and Albert Bonnier (36), followed by Luxembourg-based United Media (27) and German Bertelsmann (22). European groups with more than five localised pay-on-demand services included Swedish Albert Bonnier (12), Cypriot Vaskiani Ventures (10), Swedish Kinnevik (8), Norwegian Telenor (6), Belgian Home Entertainment Services (6) and German Pantaflix (6). Examples of international EU-based groups offering localised pay-on-demand services were Japanese Rakuten with seven localised versions of WuakiTV and Dominican-based Filmaxi with five localised versions of its Banaxi service (pages 33ff).

- While Amazon Prime, iTunes Store, Netflix and HBO Go accounted for only 13% of pay-on-demand services established in the EU28, they represented 38% of services when localised versions were considered. Similarly, while the top TV brands of US groups Discovery, Twenty-First Century Fox, Viacom and AMC Networks accounted for just 5% of TV channels established in the EU28, they represented 15% among localised services. This translates into market dominance among EU-based audiovisual service providers (pages 38ff).

TV channels and on-demand services targeting other national markets

- There are a series of hubs in Europe from where audiovisual media services serve several countries. These hubs are home to numerous pan-European brand channels and pay-on-demand services mostly owned by large broadcasting and entertainment corporations, many of which are of American origin. Around one third of all television channels (31%) and pay-on-demand services (34%) established in the EU28 by 2017 were specifically targeting foreign markets (pages 45ff).

- The establishment of services targeting other markets has a significant effect on a number of national licensing regimes as they tend to be regionally concentrated and can notably expand the overall number of services based in a country. Over two thirds of linear and pay-on-demand media services established in the EU by 2017, and targeting foreign markets, were concentrated in just three countries: The cumulated numbers of pay-on-demand services based in the United Kingdom, the Netherlands and Ireland accounted for 67% of all services targeting foreign markets, while linear services in the United Kingdom, the Czech Republic and France together comprised 69% of all such services targeting foreign markets. The United Kingdom was by and large the biggest contributor to the overall pan-European supply of targeting audiovisual services in the EU28. In total, there were 1 167 TV channels primarily targeting other markets and 224 pay-on-demand services catering to specific national markets (pages 45ff).

- Localised versions of audiovisual services form an essential portion of the number of services targeting foreign markets. As many as 79% of pay-on-demand services and 73% of television channels targeting other countries are localised versions (pages 46ff).

- Three quarters of all television channels established in the EU and targeting foreign markets were in 2017 divided between five genres: film and TV fiction/series (24%); documentary (15%); sport (13%); children (13%); and entertainment (13%). The predominant genre of pay-on-demand services was film and TV fiction/series, with 86% of all services established in the EU belonging to this category, and generalist services at 8% (pages 49ff).

- A typical target country tended in 2017 to fall into one of the following two categories: a) clusters of audiovisual markets in regions marked by cultural proximities (Nordic, Baltic, Central European countries and countries that share a joint language with countries where targeted services are based); and b) larger national audiovisual markets (e.g. Poland, France, Germany) (pages 50ff).

- There were, in 2017, 21 European countries (18 EU countries, plus Norway, Turkey, and the Russian Federation) targeted by at least 20 different linear services, most of which were established in the EU28. The EU28 top target countries for pay-on-demand services were France, Denmark, Poland and Finland; plus Norway (n>10) as the top non-EU European country. There were generally more pay-on-demand services targeting European markets from non-EU-based establishment hubs than there were linear services. This is largely due to EU-wide licensing regimes that require a local broadcasting licence for TV channels while no such jurisdiction is in place for pay-on-demand services (pages 50ff).

Broadcasting languages in Europe

- A total of 61 different languages were being broadcast across the EU28 at the end of 2017. In 11 other European territories covered by the European Audiovisual Observatory the total number of TV broadcasting languages was 45. Combining both country groups, the number of broadcasting languages rose to 64 in total (pages 52ff).

- In the EU, people had access to TV channels in 19 different broadcasting languages on average. France was the most diverse market with 35 different broadcasting languages available in the country, including Arabic, Turkish and Mandarin Chinese as well as Hebrew, Tamil and Urdu. Other diverse EU markets in terms of broadcasting languages were Sweden (27), Germany (26), Poland (24), Slovenia (23), the United Kingdom (23), Denmark (22), and Estonia and Slovakia (20 each). In other European countries covered by the European Audiovisual Observatory, Switzerland (25), Norway (20), and Turkey (20) also offered a significant number of different TV broadcasting languages (pages 53ff).

- More than half of all TV channels in Iceland were broadcast in English - the highest share in Europe by territory, closely followed by Malta with 47% of services broadcast in English. The additional six European countries where more than one quarter of TV channels available were shown in English include Cyprus (30%), Portugal (26%), Norway (26%), Croatia (26%), Finland (25%) and Greece (25%) (pages 52ff).

- In 40% of EU Member States people could watch at least half of the TV channels on offer in their country's main official language. This included Ireland (86%), Italy (84%), the United Kingdom (84%), Austria (81%), Germany (75%), Spain (68%), Greece (62%), Poland (60%), Belgium (59%, for the French Community), Hungary (57%) and France (50%). Pay-on-demand offers were fewer in number and more localised than TV channel offers. In the EU28 at least 60% of pay-on-demand services available in each market were versions with a local language user-interface (with the exceptions of the Flemish (40%) and German-speaking (9%) Communities of Belgium (pages 56ff).

- The largest bouquets of TV channels available in the main official language of the country were available to people living in EU countries such as the United Kingdom (456), Germany (345) and France (329). Results for the other European markets covered by the European Audiovisual Observatory show that people living in Russia (522) and Turkey (346) also enjoyed broad offers of TV channels available in the main official language of the country. People living in France (83), the United Kingdom (65), Poland (46) and Germany (43) had access to the highest number of pay-on-demand services with user-interfaces in the main official languages of these countries (pages 59ff).

- In a number of EU28 countries the TV channel offers available in the main official language were significantly narrower than those in English and other broadcasting languages. This was the case in the Baltic States, Malta and Slovakia. In the Baltic States, only around one in 10 TV channels was available in Estonian (8%), Lithuanian (9%) and Latvian (14%). While English language channels represented approximately one quarter of TV channels available, Russian-language channels comprised 40% of the share of TV channels available in each of these countries. In Malta, the share of TV channels in Maltese (16%) was surpassed by the portion available in English (47%) and Italian (20%). And in Slovakia the 20% share of TV channels available in Slovak came in below the 21% in English and the 26% in Czech (pages 59ff).

Synthèse

Le présent rapport dresse un panorama du paysage européen des médias audiovisuels, en étudiant sous trois angles complémentaires l'origine et la circulation des services audiovisuels linéaires et payants à la demande. Il s'intéresse d'abord aux services localisés, témoignant de l'existence d'un nombre croissant de services adaptés aux différents marchés nationaux, que ce soit sous la forme de chaînes de télévision dans différentes versions linguistiques, ou sous la forme de services payants à la demande dotés d'une interface utilisateur en langue locale pour accroître leur audience et leur nombre d'abonnés. La deuxième approche examine les répercussions des services ciblant spécifiquement d'autres pays sur les régimes nationaux d'attribution des licences. Ces services sont généralement fournis à partir de pôles d'émergence récente concentrant un grand nombre d'acteurs, à partir desquels les radiodiffuseurs et les fournisseurs de services à la demande diffusent des services vers leurs pays cibles respectifs. Le troisième angle étudié adopte le point de vue des consommateurs et s'intéresse aux différentes langues de radiodiffusion des chaînes télévisées accessibles aux spectateurs dans leur pays de résidence, ainsi qu'à la diversité linguistique des marchés européens.

Services de médias audiovisuels localisés établis en Europe

- L'adaptation aux usages locaux de l'identité d'une chaîne de télévision ou d'un service à la demande fait désormais partie intégrante de la stratégie commerciale de nombreux radiodiffuseurs et fournisseurs de services payants à la demande, qui espèrent ainsi accroître leur public et leur nombre d'abonnés. Ce phénomène reflète l'importance des différents écosystèmes culturels et linguistiques en Europe et les solutions mises en œuvre par les fournisseurs de services de médias pour répondre à cette diversité (p. 18 et suivantes).

- Fin 2017, un tiers des services de médias audiovisuels établis dans l'UE28 disposaient de versions localisées représentant un poids non négligeable sur le marché de l'audiovisuel. Cette proportion était légèrement plus élevée parmi les services payants à la demande (35 %) que les chaînes de télévision (32 %). Plus de la moitié des services de médias localisés étaient concentrés dans trois pays : le Royaume-Uni, la République tchèque et la France rassemblaient 61 % de ces chaînes, tandis que 53 % des services payants à la demande étaient basés au Royaume-Uni, aux Pays-Bas et en Suède (p. 18 et suivantes).

- Le rôle joué par le Royaume-Uni était plus prononcé encore en matière de fourniture de services localisés qu'en ce qui concerne plus largement les services audiovisuels établis dans l'UE28. Près de la moitié des chaînes localisées et plus d'un quart des services payants à la demande localisés étaient établis au Royaume-Uni, contre près d'un tiers de l'ensemble des chaînes de télévision et un cinquième des services payants à la demande (p. 21 et suivantes).

- La concentration par genre était dans l'ensemble plus importante au sein des services localisés que dans l'ensemble des médias audiovisuels établis dans l'UE28. Parmi les chaînes de télévision localisées, les genres les plus représentés étaient les films et les fictions/séries télévisées (26 %), les documentaires (16 %), les programmes pour enfants (15 %), le sport (15 %), le divertissement (10 %) et les programmes tendances/loisirs/santé/voyages (8 %). Les services payants à la demande étaient quant à eux dominés par deux genres : d'une part les films et fictions/séries télévisées, d'autre part les programmes généralistes, deux catégories qui atteignaient une part cumulée de 94 % (p. 28 et suivantes).

- Les services de médias audiovisuels localisés appartenaient plus souvent à de grands groupes de médias américains que la moyenne des services de médias établis dans l'UE28. Deux tiers des fournisseurs de services de chaînes localisées et de services payants à la demande basés dans l'UE étaient la propriété d'une maison mère américaine. La proportion était légèrement plus importante parmi les chaînes de télévision (68 %) que parmi les services payants à la demande (64 %). Le ratio s'inversait lorsque l'on considérait l'ensemble des services audiovisuels établis dans l'UE : les services détenus par des sociétés américaines en représentaient un tiers, contre deux tiers pour les filiales de groupes européens (p. 33 et suivantes).

- Sur les dix premiers groupes américains fournisseurs de chaînes localisées établies dans l'UE28, sept proposaient également un nombre important (⩾ 10) de services payants à la demande localisés. En comparaison, seuls deux des plus grands groupes européens étaient dans le même cas : les suédois Albert Bonnier et Kinnevik. Si les entités américaines proposant des services localisés sont généralement de grands groupes à intégration verticale et aux activités diversifiées, les groupes européens sont, eux, plutôt intégrés horizontalement et tendent à se concentrer sur un seul maillon de la chaîne de valeur du secteur (p. 34 et suivantes).

- Les groupes américains établis dans l'UE28 proposant les bouquets de chaînes localisées les plus fournis étaient Discovery (161), Twenty-First Century Fox (136), AMC Networks (109) et Viacom (101). Parmi les grands groupes américains offrant le plus grand nombre de services payants à la demande localisés établis dans l'UE28 figuraient trois géants technologiques – dans l'ordre Amazon (33), à la première place, suivi par Apple à la deuxième (25) et par Netflix à la quatrième (18). Leurs concurrents européens proposant des chaînes localisées étaient notamment Kinnevik (122) et Albert Bonnier (36), tous deux basés en Suède, suivis par United Media (27), au Luxembourg, et par l'allemand Bertelsmann (22). Quant aux groupes européens proposant au moins cinq services payants à la demande localisés, il s'agissait du suédois Albert Bonnier (12), du chypriote Vaskiani Ventures (10), du suédois Kinnevik (8), du norvégien Telenor (6), du belge Home Entertainment Services (6) et de l'allemand Pantaflix (6). Parmi les groupes internationaux établis dans l'UE et offrant des services payants à la demande localisés, on trouvait par exemple le japonais Rakuten, avec sept versions localisées de WuakiTV, et Filmaxi, qui a son siège en Dominique et propose cinq versions localisées de son service Banaxi (p. 33 et suivantes).

- Si Amazon Prime, iTunes Store, Netflix et HBO Go ne fournissaient que 13 % des services payants à la demande établis dans l'UE28, leur part passait à 38 % des services compte étant tenu des versions localisées. De même, si les principales marques de télévision à péage des groupes américains Discovery, Twenty-First Century Fox, Viacom et AMC Networks représentaient seulement 5 % des chaînes établies dans l'UE28, elles concentraient 15 % des services localisés. Cela se traduisait par une domination sur le marché vis-à-vis des fournisseurs de services audiovisuels établis dans l'UE (p. 38 et suivantes).

Chaînes de télévision et services à la demande ciblant d'autres marchés nationaux

- Il existe en Europe une série de pôles (« hubs ») concentrant des services de médias audiovisuels qui desservent plusieurs pays. Ils regroupent un grand nombre de marques de chaînes paneuropéennes et de services payants à la demande, généralement détenus par de grands groupes de radiodiffusion et de divertissement pour beaucoup d'origine américaine. Un tiers environ des chaînes de télévision (31 %) et des services payants à la demande (34 %) établis dans l'UE28 en 2017 ciblaient spécifiquement des marchés étrangers (p. 45 et suivantes).

- L'implantation de services destinés à d'autres marchés a des répercussions non négligeables sur un certain nombre de régimes nationaux d'attribution des licences. Ils ont en effet tendance à être concentrés dans certaines régions, ce qui peut accroître significativement le nombre total de services établis dans un pays donné. Si l'on considère les services de médias linéaires et payants à la demande établis dans l'UE qui ciblaient des marchés étrangers en 2017, plus des deux tiers se répartissaient sur trois pays seulement : le cumul des services payants à la demande établis au Royaume-Uni, aux Pays-Bas et en Irlande représentait ainsi 67 % des services ciblant des marchés étrangers, tandis que les services linéaires de même type établis au Royaume-Uni, en République tchèque et en France atteignaient 69 % du total. Le Royaume-Uni était d'ailleurs de loin le premier contributeur aux services audiovisuels paneuropéens ciblant l'étranger au sein de l'UE28. On dénombrait en tout 1 167 chaînes de télévision desservant au premier chef d'autres marchés et 224 services payants à la demande destinés à des marchés nationaux spécifiques (p. 45 et suivantes).

- Les versions localisées de services audiovisuels constituaient une part importante des services ciblant les marchés étrangers. Pas moins de 79 % des services payants à la demande et 73 % des chaînes de télévision ciblant d'autres marchés étaient des versions localisées (p. 46 et suivantes).

- Les trois quarts des chaînes de télévision établies dans l'UE et desservant des marchés étrangers se répartissaient en 2017 entre cinq genres : films et fictions/séries télévisées (24 %), documentaires (15 %), sport (13 %), programmes pour enfants (13 %) et divertissement (13 %). Les films et les fictions/séries télévisées constituaient la catégorie prédominante parmi les services payants à la demande, puisqu'ils représentaient 86 % des services établis dans l'UE. Venaient ensuite les services généralistes, à hauteur de 8 % (p. 49 et suivantes).

- Les pays cibles, en 2017, relevaient généralement de l'une des catégories suivantes : a) ensembles de marchés audiovisuels situés dans des régions présentant une proximité culturelle (pays nordiques ou baltes, pays d'Europe centrale et pays partageant une langue avec les pays dans lesquels les services étaient établis) ; b) marchés audiovisuels nationaux de grande ampleur (Pologne, France ou Allemagne, par exemple) (p. 50 et suivantes).

- En 2017, 21 pays européens étaient ciblés par plus de 20 services linéaires différents (18 pays de l'UE, ainsi que la Norvège, la Turquie et la Fédération de Russie), pour la plupart établis dans l'UE28. Au sein de cette dernière, les premiers pays cibles pour les services payants à la demande étaient la France, le Danemark, la Pologne et la Finlande ; s'y ajoutait la Norvège (n > 10). Globalement, les services payants à la demande ciblant des marchés européens à partir de pôles situés à l'extérieur de l'UE étaient plus nombreux que les services linéaires. Ceci est principalement dû aux régimes d'attribution des licences à l'échelon de l'UE qui imposent des licences de radiodiffusion locales pour les chaînes, tandis que les services payants à la demande ne sont pas soumis à la même obligation (p. 50 et suivantes).

Langues de radiodiffusion en Europe

- Fin 2017, la radiodiffusion dans l'UE28 se faisait au total dans 61 langues différentes. Dans les 11 autres territoires couverts par l'Observatoire européen de l'audiovisuel , on comptait 45 langues de télédiffusion. Si l'on combine les deux groupes de pays, ce nombre atteignait 64 en tout (p. 52 et suivantes).

- Au sein de l'UE, les spectateurs avaient en moyenne accès à des chaînes de télévision dans 19 langues différentes. La France était le marché qui présentait la plus grande diversité, avec 35 langues disponibles, parmi lesquelles l'arabe, le turc et le mandarin, mais aussi l'hébreu, le tamoul et l'ourdou. Les autres marchés de l'UE mettant à disposition une offre diversifiée de ce point de vue étaient la Suède (27 langues), l'Allemagne (26), la Pologne (24), la Slovénie (23), le Royaume-Uni (23), le Danemark (22), ainsi que l'Estonie et la Slovaquie (20 langues chacune). Parmi les autres pays étudiés par l'Observatoire européen de l'audiovisuel, la Suisse (25), la Norvège (20) et la Turquie (20) proposaient elles aussi un nombre significatif de langues de télédiffusion (p. 53 et suivantes).

- Plus de la moitié des chaînes télévisées islandaises diffusait en langue anglaise ; l'Islande était ainsi le pays d'Europe où cette proportion était la plus élevée, devant Malte où 47 % des services étaient en anglais. Dans six autres pays européens, un quart au moins des chaînes de télévision disponibles étaient proposées en anglais : Chypre (30 %), le Portugal (26 %), la Norvège (26 %), la Croatie (26 %), la Finlande (25 %) et la Grèce (25 %) (p. 52 et suivantes).

- Dans 40 % des Etats membres de l'UE, les spectateurs pouvaient regarder au moins la moitié des chaînes de télévision à disposition dans la langue officielle de leur pays. Tel était notamment le cas en Irlande (86 %), en Italie (84 %), au Royaume-Uni (84 %), en Autriche (81 %), en Allemagne (75 %), en Espagne (68 %), en Grèce (62 %), en Pologne (60 %), dans la Communauté française de Belgique (59 %), en Hongrie (57 %) et en France (50 %), territoires comptant au minimum 50 % de chaînes de télévision dans leur langue officielle. Les offres de services payants à la demande étaient moins nombreuses et plus localisées que les offres télévisées. Dans l'UE28, 60 % au moins des services payants à la demande disponibles dans chaque marché étaient des versions présentant une interface utilisateur dans la langue locale (à l'exception des Communautés flamande (40 %) et germanophone (9 %) de Belgique) (p. 56 et suivantes).

- Les résidents de pays de l'UE tels que le Royaume-Uni (456), l'Allemagne (345) et la France (329) bénéficiaient des bouquets de chaînes de télévision les plus fournis dans leur langue officielle. Les chiffres relevés pour les autres marchés européens étudiés par l'Observatoire européen de l'audiovisuel montraient que les habitants de la Russie (522) et de la Turquie (346) avaient également accès à une vaste offre de chaînes de télévision dans la langue de leur pays. C'est en France (83), au Royaume-Uni (65), en Pologne (46) et en Allemagne (43) que les spectateurs pouvaient accéder au plus grand nombre de services payants à la demande accompagnés d'une interface utilisateur dans la langue officielle du pays (p. 59 et suivants).

- Dans un certain nombre de pays de l'UE28, l'offre de chaînes de télévision dans la langue officielle locale est nettement inférieure au nombre de chaînes en anglais et dans d'autres langues. Tel est le cas dans les pays baltes, à Malte et en Slovaquie. Dans les pays baltes, seul un dixième des chaînes environ est disponible en estonien (8 %), en lituanien (9 %) et en letton (14 %). Si les diffuseurs anglophones constituent approximativement un quart des chaînes de télévision disponibles dans chacun de ces pays, leurs homologues russes en représentent plus de 40 %. A Malte, la part des chaînes de télévision en maltais (16 %) est largement inférieure à celle des chaînes en anglais (47 %) et en italien (20 %). Enfin, en Slovaquie, on comparera les 20 % de chaînes de télévision disponibles en slovaque aux 21 % de services en anglais et aux 26 % en tchèque (p. 59 et suivantes).

Zusammenfassung

Dieser Bericht enthält einen Überblick über die audiovisuelle Medienlandschaft in Europa. Er untersucht die Herkunft linearer audiovisueller Dienste und kostenpflichtiger Video-On-Demand-Dienste sowie ihre Verbreitung unter drei Blickwinkeln, die sich gegenseitig ergänzen. Der erste konzentriert sich auf lokalisierte Dienste. Darin spiegelt sich ein aktueller Trend: Immer mehr audiovisuelle Dienste werden auf unterschiedliche nationale Märkte abgestimmt, entweder als Fernsehsender in verschiedenen Sprachversionen oder als kostenpflichtige On-Demand-Dienste mit Nutzerschnittstellen in der Landessprache, um mehr Zuschauer und Abonnenten zu gewinnen. Der zweite Blickwinkel befasst sich mit der Frage, welche Auswirkungen Dienste, die speziell auf andere Länder ausgerichtet sind, auf die Lizenzsysteme in den einzelnen Ländern haben. Diese Dienste werden in der Regel von neu entstandenen Plattformen angeboten, von denen aus Rundfunksender und On-Demand-Anbieter diese Dienste in die Zielländer verbreiten. Der dritte Blickwinkel bezieht sich auf die Verbraucherperspektive und konzentriert sich auf die verschiedenen Sprachen von Fernsehsendern, die den Zuschauern in ihren Heimatländern zur Verfügung stehen. Darin spiegelt sich die sprachliche Vielfalt auf dem europäischen Markt wider.

In Europa ansässige lokalisierte audiovisuelle Mediendienste

- Die Anpassung von Fernsehsendern und Abrufdiensten an lokale Gewohnheiten ist inzwischen zu einem festen Bestandteil der Geschäftsstrategie vieler Rundfunksender und von Anbietern kostenpflichtiger Abrufdienste geworden, um die Zahl der Zuschauer und der Abonnenten zu erhöhen. Darin wird zum einen die Bedeutung der kulturellen und sprachlichen Ökosysteme in Europa deutlich, zum anderen zeigt diese Entwicklung, wie die Anbieter von Mediendiensten auf diese Vielfalt reagieren (Seiten 18ff).

- Ende 2017 handelte es sich bei rund einem Drittel aller in der EU28 ansässigen audiovisuellen Mediendienste um lokalisierte Ableger internationaler Anbieter mit einem erheblichen Gewicht auf dem audiovisuellen Markt. Bei den Abrufdiensten war dieser Anteil etwas höher (35%) als bei den Fernsehsendern (32%). Mehr als die Hälfte aller lokalisierten audiovisuellen Mediendienste konzentrierte sich auf drei Länder: das Vereinigte Königreich, die Tschechische Republik und Frankreich. Von diesen Ländern strahlten 61% der Fernsehsender ihre Programme aus, 53% der kostenpflichtigen Abrufdienste wurden vom Vereinigten Königreich, von den Niederlanden und von Schweden aus angeboten (Seiten 18ff).

- Bei den lokalisierten Ablegern spielt das Vereinigte Königreich sogar eine noch größere Rolle als bei den in der EU28 niedergelassenen audiovisuellen Diensten insgesamt. Nahezu die Hälfte aller lokalisierten Fernsehsender und mehr als ein Viertel aller lokalisierten kostenpflichtigen Abrufdienste hatten ihren Sitz im Vereinigten Königreich, im Vergleich zu fast einem Drittel aller Fernsehsender und einem Fünftel aller kostenpflichtigen Abrufdienste (Seiten 21ff).

- Die Genre-Konzentration ist bei lokalisierten Diensten in der Regel höher als bei den in der EU28 ansässigen audiovisuellen Mediendiensten. Die beliebtesten Genres unter den lokalisierten Fernsehsendern waren Kino- und Fernsehfilme/Serien (26%); Dokumentarfilme (16%); Kindersendungen (15%); Sport (15); Unterhaltung (10%) und Lifestyle/Freizeit/Gesundheit/Reisen (8%). Bei den lokalisierten kostenpflichtigen Abrufdiensten dominierten zwei Genres: Kino- und Fernsehfilme/Fernsehserien und allgemeine Programme mit einem aggregierten Anteil von 94% (Seiten 28ff).

- Lokalisierte audiovisuelle Mediendienste sind häufiger im Besitz von großen US-Medienkonzernen als normale in der EU28 ansässige Mediendienste. So gehörten zwei Drittel aller in der EU ansässigen Anbieter von lokalisierten Fernsehsendern und kostenpflichtigen Abrufdiensten zu einer US-Muttergesellschaft. Bei den Fernsehsendern ist dieser Anteil etwas höher (68%) als bei den kostenpflichtigen Abrufdiensten (64%). Ein umgekehrtes Verhältnis ergibt sich, wenn man die Gesamtheit der audiovisuellen Dienste betrachtet, die in der EU ansässig sind: Dienste, die zu einem US-Unternehmen gehören, machen ein Drittel aus - im Vergleich zu zwei Dritteln, die eine europäische Muttergesellschaft haben (Seiten 33ff).

- Sieben der Top-10-US-Gruppen, die lokalisierte Fernsehsender mit Sitz in der EU28 in ihrem Portfolio haben, bieten auch eine große Zahl lokalisierter kostenpflichtiger Abrufdienste an (⩾10). Bei europäischen Unternehmen war dies nur bei zwei der Fall: bei den schwedischen Medienkonzernen Albert Bonnier und Kinnevik. Amerikanische Konzerne, die lokalisierte Ableger anbieten, sind in der Regel vertikal integrierte Medienunternehmen mit einem diversifizierten Senderportfolio. Bei europäischen Gruppen handelt es sich dagegen eher um horizontal integrierte Unternehmen mit der Tendenz, sich auf einen einzelnen Teil der Wertekette der Branche zu konzentrieren (Seiten 34ff).

- Die Top-US-Gruppen mit dem größten Programmpaket lokalisierter Fernsehsender in der EU28 waren Discovery (161), Twenty-First Century Fox (136), AMC Networks (109) und Viacom (101). Zu den Top-US-Gruppen mit dem größten Angebot an lokalisierten kostenpflichtigen Abrufdiensten mit Sitz in der EU28 gehörten drei große Technologieunternehmen, an der Spitze Amazon (33), gefolgt von Apple (25) und Netflix (18) an 4. Stelle. Europäische Konkurrenten, die lokalisierte Fernsehsender in ihrem Senderportfolio haben, waren unter anderem die beiden schwedischen Medienkonzerne Kinnevik (122) und Albert Bonnier (36), gefolgt von der in Luxemburg ansässigen United Media (27) und dem deutschen Bertelsmann-Konzern (22). Europäische Gruppen mit mehr als fünf lokalisierten kostenpflichtigen Abrufdiensten sind die zypriotische Vaskiani Ventures (10), die schwedische Kinnevik (8), das norwegische Mobilfunkunternehmen Telenor (6), die belgische Home Entertainment Services (6) und die deutsche Video-on-Demand-Plattform Pantaflix (6). Beispiele internationaler in der EU ansässiger Gruppen von lokalisierten kostenpflichtigen Abrufdiensten waren die japanische Rakuten mit 7 lokalisierten Versionen von WuakiTV und die dominikanische Filmaxi mit 5 lokalisierten Versionen ihres Dienstes Banaxi (Seiten 33ff).

- Bei den kostenpflichtigen Abrufdiensten, die in der EU28 ihren Sitz haben, entfallen 13% auf Amazon Prime, iTunes Store, Netflix und HBO Go, bei den lokalisierten Versionen liegt der Anteil dagegen bei 38%. Ähnlich ist es bei den Top-Fernsehsendern der US-Gruppen Discovery, Twenty-First Century Fox, Viacom und AMC Networks: Auf sie entfallen lediglich 5% der Fernsehsender mit Sitz in der EU28, bei den lokalisierten Diensten sind es dagegen 15%. Darin spiegelt sich die Marktdominanz unter den in der EU-ansässigen Anbietern von audiovisuellen Diensten (Seiten 38ff).

Fernsehsender und Abrufdienste, die auf andere nationale Märkte abzielen

- Es gibt in Europa eine Reihe von Plattformen, die von audiovisuellen Mediendiensten für die Verbreitung ihrer Dienste in mehrere Länder genutzt werden. Diese Plattformen sind der Sitz zahlreicher gesamteuropäischer Fernsehsender und kostenpflichtiger Abrufdienste, die in der Regel im Besitz von großen Rundfunk- und Unterhaltungsunternehmen sind, viele davon US-amerikanische. Rund ein Drittel aller Fernsehsender (31%) und aller kostenpflichtigen Abrufdienste (34%) mit Sitz in der EU28 waren 2017 speziell auf ausländische Märkte ausgerichtet (Seiten 45ff).

- Die Tatsache, dass viele Dienste auf andere Märkte ausgerichtet sind, hat Auswirkungen auf eine Reihe von nationalen Lizenzsystemen, da diese regional konzentriert sind und die Gesamtzahl von Diensten, die in einem Land ansässig sind, erheblich ausweiten kann. Mehr als zwei Drittel der linearen Dienste und der kostenpflichtigen Abrufdienste, die 2017 in der EU ansässig und auf ausländische Märkte gerichtet waren, konzentrierte sich auf lediglich drei Länder: Die kumulierte Zahl kostenpflichtiger Abrufdienste mit Sitz im Vereinigten Königreich, den Niederlanden und Irland machte 67% aller Dienste aus, die auf ausländische Märkte ausgerichtet waren. Bei den linearen Diensten im Vereinigten Königreich, der Tschechischen Republik und Frankreich waren 69% aller Dienste auf ausländische Märkte gerichtet. Das Vereinigte Königreich ist bei weitem der größte Anbieter solcher Dienste in der EU28. Insgesamt gab es 1.167 Fernsehsender, deren Programme in erster Linie auf andere Märkte abzielen, und 224 kostenpflichtige Abrufdienste, die auf bestimmte nationale Märkte ausgerichtet sind (Seiten 45ff).

- Lokalisierte Versionen audiovisueller Dienste stellen einen wesentlichen Teil der Dienste dar, die auf ausländische Märkte gerichtet sind. So handelt es sich bei 79% der kostenpflichtigen Abrufdienste und bei 73% der Fernsehsender, die auf andere Länder abzielen, um lokalisierte Versionen (Seiten 46ff).

- Drei Viertel aller in der EU ansässigen Fernsehsender, die auf ausländische Märkte gerichtet sind, konzentrierten sich 2017 auf fünf Genres: Kino- und Fernsehfilme/Serien (24%); Dokumentarfilme (15%); Sport (13%); Kinderprogramme

(13%) und Unterhaltung (13%). Bei den kostenpflichtigen Abrufdiensten dominierten Kino- und Fernsehfilme/Serien mit 86% aller in der EU ansässigen Dienste, die zu dieser Kategorie gehören, und allgemeine Dienste mit 8% (Seiten 49ff).

- Ein typisches Zielland fiel 2017 in der Regel unter eine der beiden Kategorien: a) Cluster von audiovisuellen Märkten in kulturell nahestehenden Regionen (nordische Länder, baltische Länder, mitteleuropäische Länder und Länder, die dieselbe Sprache haben wie das Land, in dem die Dienste ihren Sitz haben); und b) große nationale audiovisuelle Märkte (z.B. Polen, Frankreich, Deutschland) (Seiten 50ff).

- 2017 gab es 21 europäische Länder, auf die mindestens 20 verschiedene lineare Dienste ausgerichtet waren (18 EU-Länder plus Norwegen, die Türkei und die Russische Föderation), die meisten mit Sitz in der EU28. Die Top-EU28-Zielländer waren Frankreich, Dänemark, Polen und Finnland plus Norwegen (n>10). In der Regel war die Zahl der kostenpflichtigen Abrufdienste, die von Nicht-EU-Plattformen auf europäische Märkte ausgerichtet waren, höher als die Zahl der linearen Dienste. Dies liegt in erster Linie an dem System der Sendelizenzen in der EU. Für Fernsehsender muss eine lokale Rundfunklizenz beantragt werden, bei den Abrufdiensten ist dies in der Regel nicht notwendig (Seiten 50ff).

Rundfunksprachen in Europa

- Ende 2017 wurde in der EU28 in 61 verschiedenen Sprachen gesendet. In den andern europäischen Ländern , die Mitglied der Europäischen Audiovisuellen Informationsstelle sind, lag die Gesamtzahl der Sprachen der in der EU ansässigen kostenpflichtigen Abrufdienste bei 45. Kombiniert man beide Ländergruppen, erhöht sich die Zahl der Sprachen auf 64 (Seiten 52ff).

- In der EU stehen den Zuschauern im Durchschnitt Fernsehsender in 19 Sprachen zur Verfügung. Frankreich ist der am stärksten diversifizierte Markt mit 35 verschiedenen Sprachen, darunter Arabisch, Türkisch und Chinesisch, aber auch Hebräisch, Tamilisch und Urdu. Andere EU-Märkte, in denen Fernsehsender in vielen Sprachen zugänglich sind, sind Schweden (27), Deutschland (26), Polen (24), Slowenien (23), das Vereinigte Königreich (23), Dänemark (22), Estland und die Slowakei (jeweils 20). Von den anderen europäischen Ländern, die Mitglied der Europäischen Audiovisuellen Informationsstelle sind, sind es vor allem die Schweiz (25), Norwegen (20) und die Türkei (20), deren Fernsehsender eine große Zahl unterschiedlicher Sprachen anbieten (Seiten 53ff).

- Mehr als die Hälfte aller Fernsehsender in Island senden in Englisch. Dies ist der höchste Anteil in Europa, gefolgt von Malta mit 47%. Weitere sechs Länder, in denen mehr als ein Viertel aller Fernsehkanäle in Englisch sendet, sind Zypern (30%), Portugal (26%), Norwegen (26%), Kroatien (26%), Finnland (25%) und Griechenland (25%) (Seiten 52ff).

- In 40% der EU-Mitgliedstaaten können die Menschen mindestens die Hälfte aller Fernsehsender in der Landessprache sehen. Dazu zählen Irland (86%), Italien (84%), das Vereinigte Königreich (84%), Österreich (81%), Deutschland (75%), Spanien (68%), Griechenland (62%), Polen (60%), die Französische Gemeinschaft Belgiens (59%), Ungarn (57%) und Frankreich (50%), wo der Anteil von Fernsehsendern in der Amtssprache des Landes bei 50% und höher liegt. Kostenpflichtige Abrufdienste sind weniger zahlreich und stärker lokalisiert als Fernsehkanäle. In der EU28 waren mindestens 60% der kostenpflichtigen Abrufdienste, die in den einzelnen Märkten zugänglich sind, Versionen mit einer Nutzerschnittstelle in der Landessprache (mit Ausnahme der Flämischen (40%) und der Deutschsprachigen Gemeinschaft Belgiens (9%) (Seiten 56ff).

- Zu den EU-Ländern, in denen die Zuschauer von der größten Zahl an Senderpaketen in der ersten Amtssprache ihres Landes profitieren können, zählen das Vereinigte Königreich (456), Deutschland (345) und Frankreich (329). Ergebnisse aus den anderen europäischen Märkten zeigen, dass den Fernsehzuschauern in Russland (522) und der Türkei (346) ebenfalls ein großes Angebot an Fernsehkanälen in ihrer Muttersprache zur Verfügung steht. In Frankreich (83), im Vereinigten Königreich (65), in Polen (46) und Deutschland (43) haben die Menschen dagegen Zugang zu der größten Zahl von kostenpflichtigen Abrufdiensten mit Nutzerschnittstellen in der Amtssprache dieser Länder (Seiten 59ff).

- In einer Reihe von EU28-Ländern ist die Zahl der Fernsehsender, die in der Amtssprache des Landes senden, deutlich geringer als die Zahl der Sender, die ihre Programme in Englisch oder in einer anderen Sprache ausstrahlen. Dies ist der Fall in den baltischen Staaten, in Malta und in der Slowakei. In den baltischen Ländern sendet nur rund ein Zehntel der Fernsehsender in Estnisch (8%), Litauisch (9%) und Lettisch (14 %). Englischsprachige Sender stellten rund ein Viertel der verfügbaren Fernsehsender in diesen Ländern dar (20%), der Anteil russischsprachiger Sender lag sogar bei 40%. In Malta liegt die Zahl der Sender, die in maltesischer Sprache (16%) senden, weit unter der Zahl der englischsprachigen Sender (47%). Und in der Slowakei senden 20% der Fernsehsender in Slowakisch, verglichen mit 21% in Englisch und 26% in Tschechisch (Seiten 59ff).

1. Localised audiovisual media services in Europe

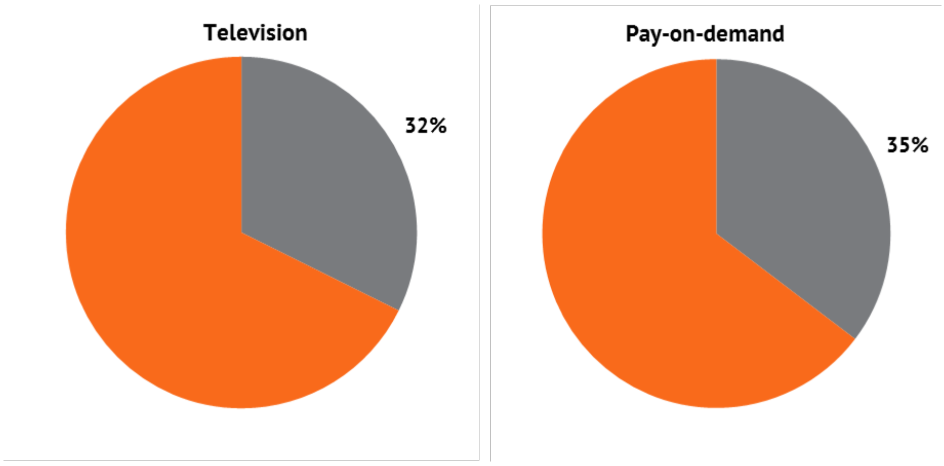
The following chapter looks at how operators of audiovisual media services adapt to the linguistic and cultural diversity in the various European markets by offering TV channels in different linguistic versions and pay-on-demand services with local-language user-interfaces. The first part evaluates the weight of localised TV channels and pay-on-demand services among audiovisual media services established in Europe. The second part provides an overview of the most popular genres of such services, their distribution and most common business models in comparison to the rest of the audiovisual media services established in Europe. The fourth and fifth parts map the ownership structures of localised services and the most widely circulated brands.

1.1. The weight of localised audiovisual media services

Pan-European trends: The significance of localised services

- Adapting a TV channel brand and on-demand service to local customs has become an integral part of the business strategies of many broadcasters and pay-on-demand service providers. It flags up the importance of the various cultural and language ecosystems in Europe and how media service providers respond to this diversity.
- At the end of 2017, one third of all audiovisual media services established in the EU28 existed as localised versions. The share among on-demand services was somewhat higher (35%) than among television channels (32%). In total numbers this meant that 1 232 of the 3 812 TV channels and 236 of the 668 pay-on-demand services based in the EU were localised versions. The share of localised versions among the countries covered by the European Audiovisual Observatory was more skewed towards pay-on-demand services (37%) than television channels (28%).

Figure 1. Localised audiovisual media services established in the EU28 (2017) – In % share

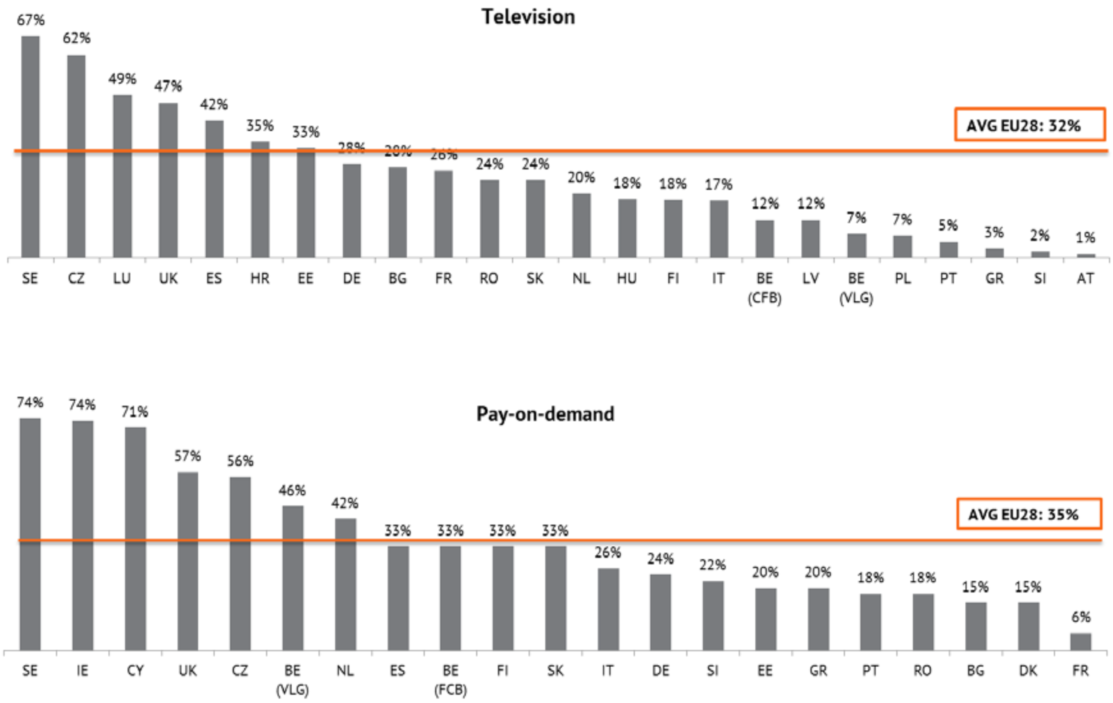


Source: European Audiovisual Observatory / MAVISE database

Pan-European trends: The weight of localised services in national markets

- In seven EU countries the share of localised TV channels was above the EU average of 32%, including Sweden, the Czech Republic, Luxembourg, the United Kingdom, Spain, Croatia and Estonia. The seven countries with an above-EU-average share of localised on-demand services (35%) included Sweden, Ireland, Cyprus, the United Kingdom, the Czech Republic, Belgium (the Flemish Community) and the Netherlands.

Figure 2. Localised audiovisual media services by country of establishment in the EU28 (2017) - In % share

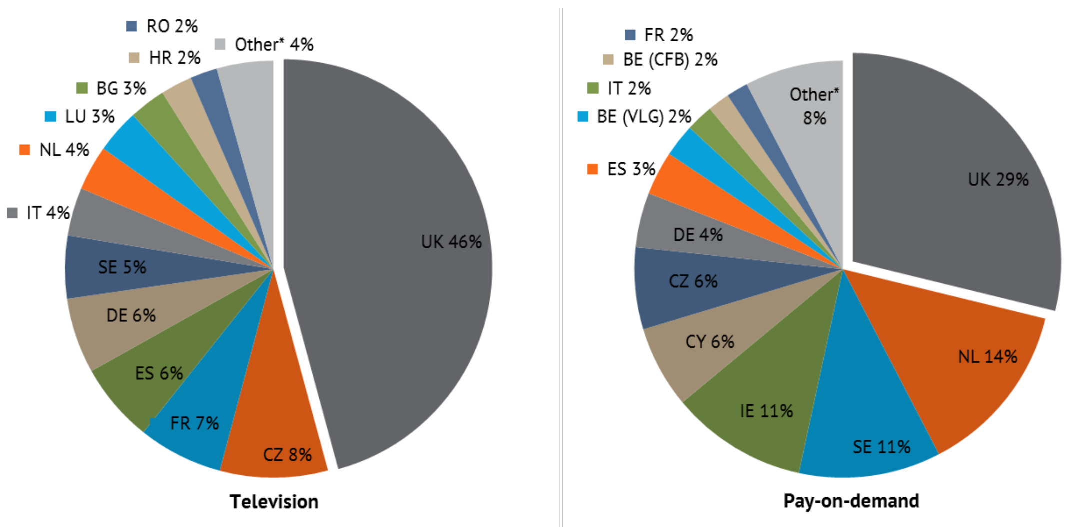


Source: European Audiovisual Observatory / MAVISE database

Pan-European trends: National contributions to supply of localised services

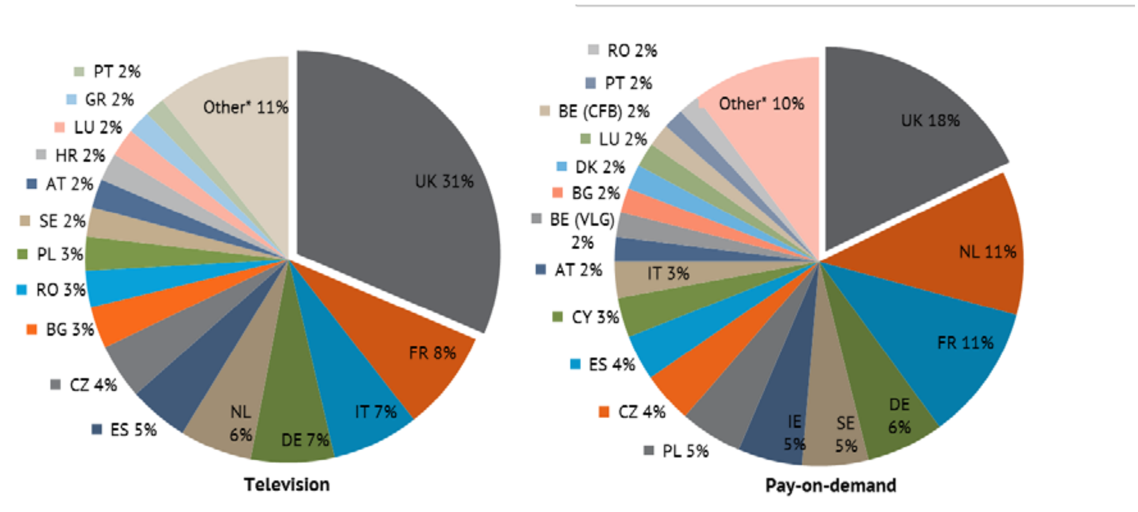
- The territorial establishment of audiovisual media services was more concentrated among pay-on-demand services than among TV channels. Nearly half of all TV channels and well over a third of pay-on-demand services established in the EU28 by 2017 were concentrated in three countries: The cumulated numbers of services based in the United Kingdom, France and Italy accounted for 46% of all TV channels, and 40% of all pay-on-demand services were established in the United Kingdom, the Netherlands and France. The top 10 countries accounted for around three quarters of all linear (77%) and pay-on-demand (72%) services, respectively.
- A similar picture emerges for audiovisual services with localised versions, where concentration levels were even higher. Over half of all audiovisual media services with localised versions were concentrated in three countries: The cumulated figures of services based in the United Kingdom, the Czech Republic and France accounted for 61% of TV channels with localised versions, and 53% of localised pay-on-demand services were based in the United Kingdom, the Netherlands and Sweden. The top 10 countries accounted for over 90% of all localised services.
- The United Kingdom was by and large the biggest contributor to the overall pan-European localised services supply in the EU28. Nearly half of all localised TV channels and over one quarter of localised pay-on-demand services were established in the United Kingdom. This was also the case for the overall number of audiovisual services established in the EU28. With close to one third of TV channels and nearly one fifth of pay-on-demand services, the United Kingdom was by far the biggest establishment hub of audiovisual services in the EU28. These figures demonstrate that the United Kingdom plays an even greater part in the provision of localised services than it does in the overall supply of audiovisual services established in the EU28.

Figure 3. Contribution to supply of localised audiovisual media services by country of establishment in the EU28 (2017) - In % share



Source: European Audiovisual Observatory / MAVISE database
Notes: Television Other includes: FI, SK, EE, PL 1% each; HU, PT, BE (VLG), BE (CFB), LV, GR, AT, SI (<1% each); Pay-on-demand Other* includes: FI, SK, SI, PT, RO, BG, DK 1% each; EE, GR (<1% each).*

Figure 4. **Contribution to supply of all audiovisual media services by country of establishment in the EU28 (2017) - In % share**



Source: European Audiovisual Observatory / MAVISE database
Notes: Television Other includes: FI, SI, BE (VLG), SK, CY, HU, MT, BE (CFB), LV, EE, DK, IE (1% each); LT, BE (DGB)(<1% each); Pay-on-demand Other* includes: HR, FI, SK, SI, HU, LT, EE, GR, LV, MT (1% each).*

Table 1. **Concentration of TV channels established in the EU28 (2017)**

Country	Total national	% share of EU total	Cumulative %
UK	1 197	31%	31%
FR	306	8%	39%
IT	264	7%	46%
DE	253	7%	53%
NL	219	6%	59%
ES	182	5%	64%
CZ	167	4%	68%
BG	127	3%	71%
RO	110	3%	74%
PL	103	3%	77%
SE	89	2%	79%
AT	87	2%	81%
HR	85	2%	84%
LU	85	2%	86%
GR	71	2%	88%
PT	61	2%	89%
FI	57	1%	91%
SI	54	1%	92%
BE (VLG)	42	1%	93%
SK	34	1%	94%
CY	30	1%	95%
HU	28	1%	96%
MT	28	1%	97%
BE (CFB)	26	1%	97%
LV	26	1%	98%

EE	24	1%	99%
DK	20	1%	99%
IE	20	1%	100%
LT	15	0%	100%
BE (DGB)	2	0%	100%
Total EU 28	**3 812**	**100%**	**100%**

Source: European Audiovisual Observatory / MAVISE database

Table 2. Concentration of pay-on-demand services established in the EU28 (2017)

Country	Total national	% share of EU total	Cumulative %
UK	119	18%	18%
NL	76	11%	29%
FR	72	11%	40%
DE	41	6%	46%
SE	35	5%	51%
IE	34	5%	56%
PL	33	5%	61%
CZ	27	4%	65%
ES	24	4%	69%
CY	21	3%	72%
IT	19	3%	75%
AT	13	2%	77%
BE (VLG)	13	2%	79%
BG	13	2%	81%
DK	13	2%	83%
LU	13	2%	85%
BE (CFB)	12	2%	87%
PT	11	2%	88%
RO	11	2%	90%
HR	9	1%	91%
FI	9	1%	93%
SK	9	1%	94%
SI	9	1%	95%
HU	8	1%	96%
LT	6	1%	97%
EE	5	1%	98%
GR	5	1%	99%
LV	4	1%	99%
MT	4	1%	100%
Total EU 28	**668**	**100%**	**100%**

Source: European Audiovisual Observatory / MAVISE database

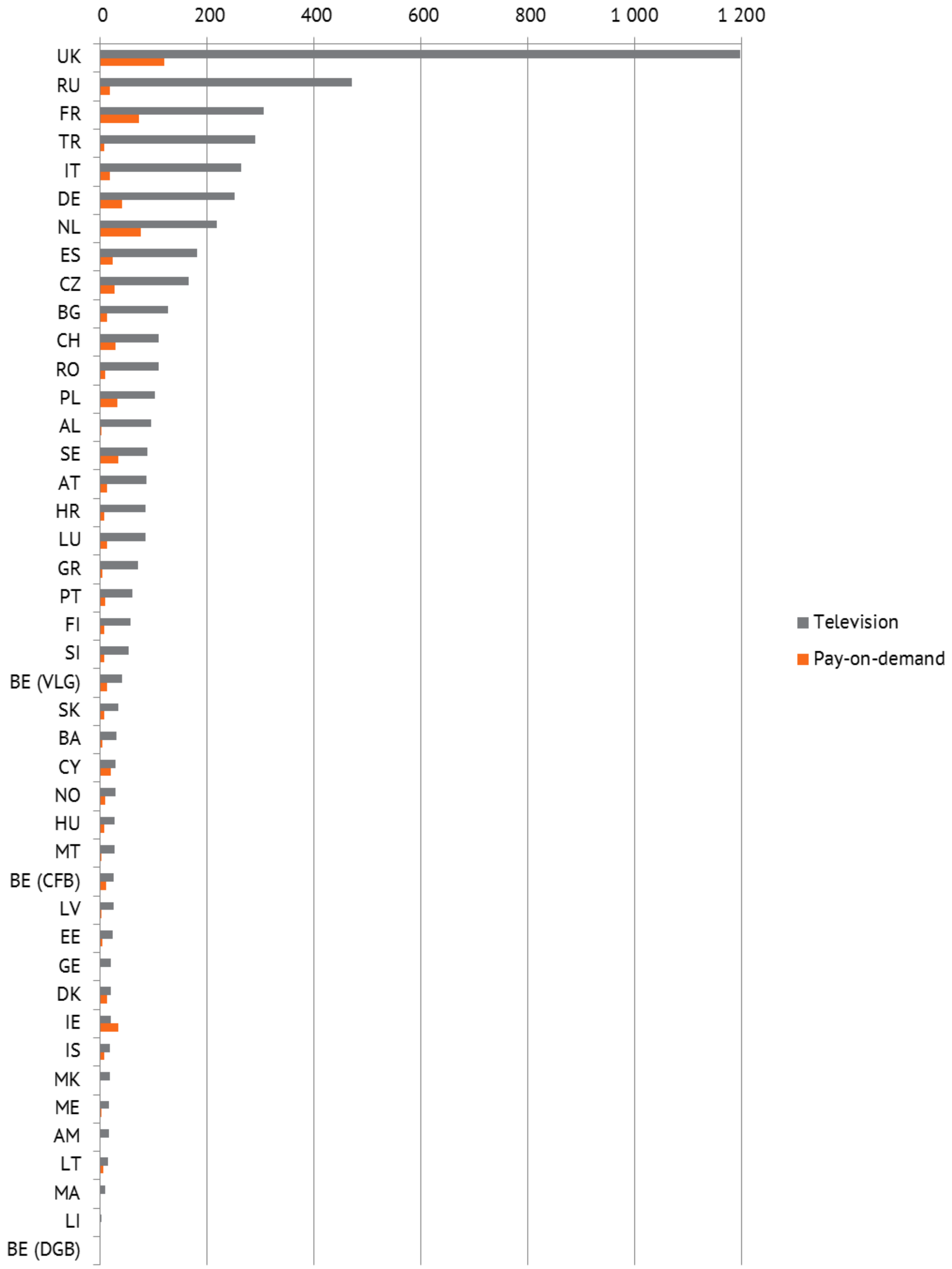
Pan-European trends: Vast supply of audiovisual media services in Europe

- At the end of 2017, the EU was home to a total of 3 812 television and 668 pay-on-demand services. Around 7% of television services were public service broadcasting channels and 36% of linear services in the EU28 were available in HD format. Pay-on-demand offers were predominantly private with just 3% of services provided by public service broadcasters. In the territories of the 40 European countries covered by the

European Audiovisual Observatory, plus Morocco, a total of 4 951 television and 848 pay-video-on-demand services had been established. Among these, around 8% of television channels and just 2% of pay-on-demand services were owned by public service broadcasting organisations.

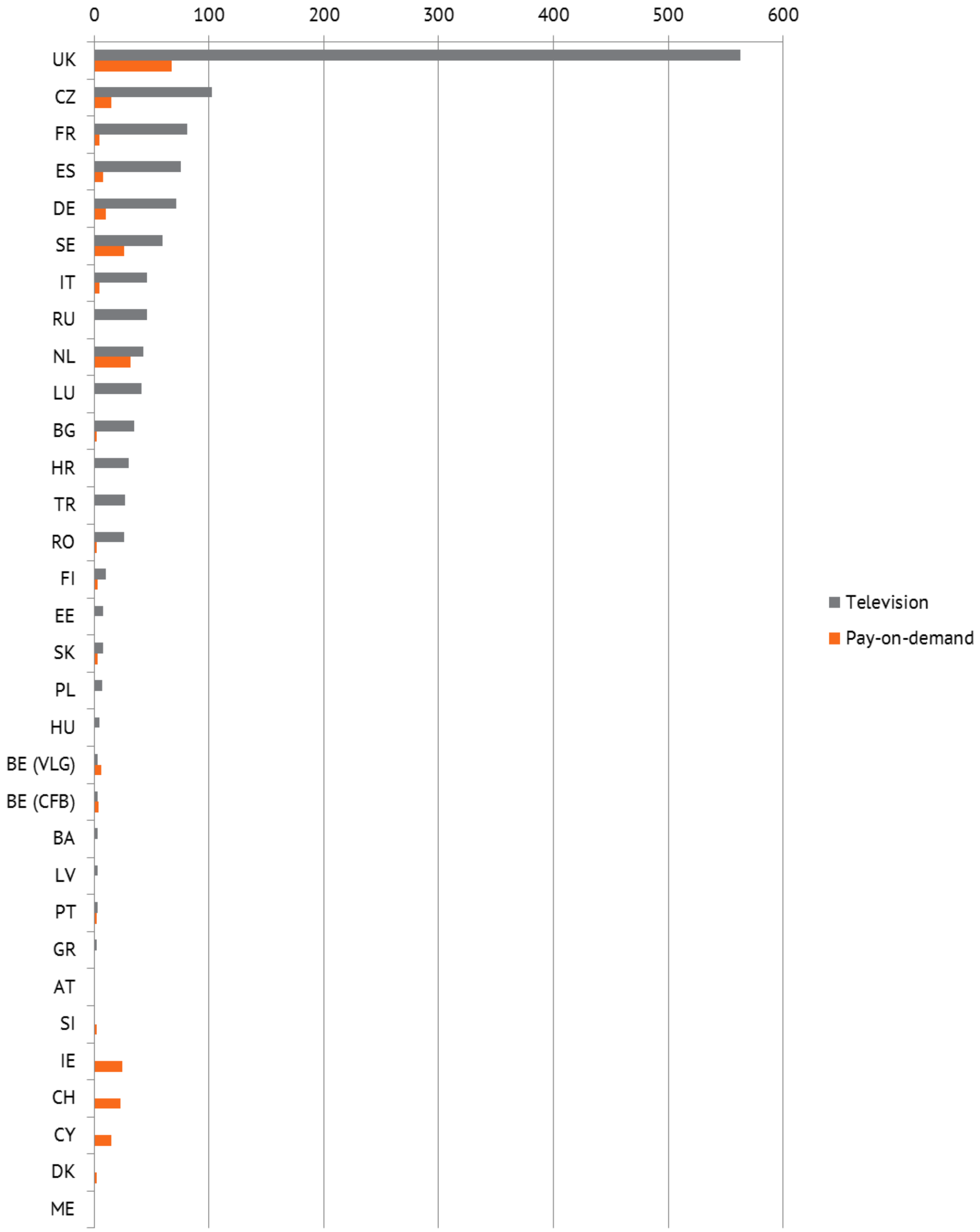
- Market size, varying economic conditions, cultural proximity to other countries and individual licensing regimes all play a part in explaining the sometimes significant differences between national television landscapes, particularly with regard to the total number of services based in a country. Differences in the figures ranged from 1 197 television channels and 121 pay-on-demand services established in the United Kingdom to 15 linear and six pay-on-demand services in Lithuania.
- The majority of localised versions of audiovisual media services were established in the EU28 with 94% of TV channels and 78% of pay-on-demand services . The total numbers of localised services for the 41 territories covered by the European Audiovisual Observatory was 1 360 TV channels and 303 pay-on-demand services. While eight countries had no localised pay-on-demand services established in their territories (Austria, Croatia, Hungary, Latvia, Luxembourg, Poland, the Russian Federation and Turkey) five other countries had localised pay-on-demand services but no localised TV channels established in their national markets (Cyprus, Denmark, Ireland, Montenegro and Switzerland).

Figure 5. Audiovisual media services by country of establishment in EUR 40 + Morocco (2017) – In number of services



Source: European Audiovisual Observatory / MAVISE database

Figure 6. Localised audiovisual media services by country of establishment in EUR 40 + Morocco (2017) – In number of services



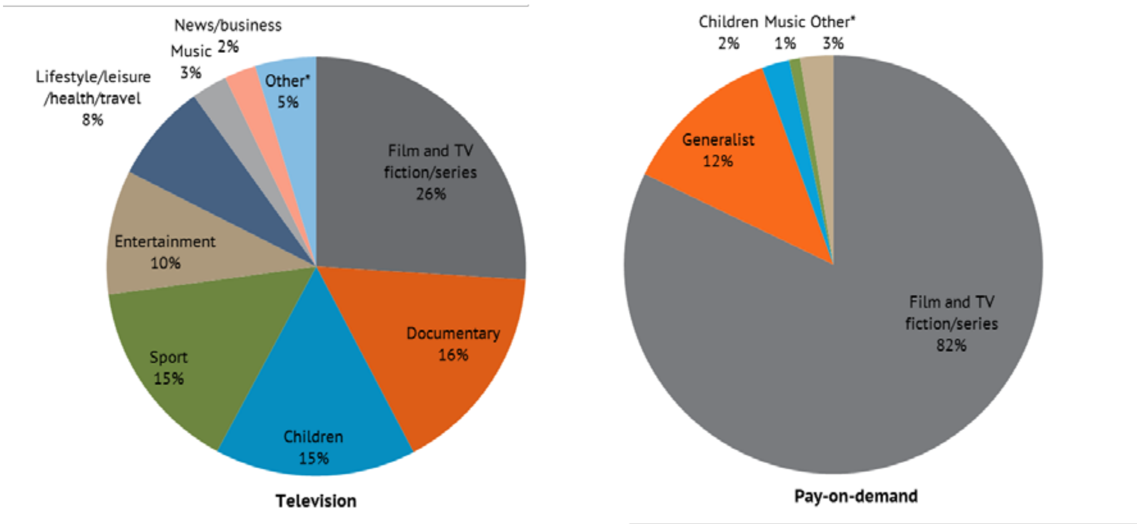
Source: European Audiovisual Observatory / MAVISE database

1.2. Genre analysis of audiovisual media services

Pan-European trends: Pay-on-demand services show high genre concentration

- The European television and pay-on-demand market is characterised by an array of thematic services catering to a variety of specialist interests and target audiences. Seven out of 10 TV channels established in the EU by 2017 belonged to one of the following genres: sport (15%); film and TV fiction/series (14%), entertainment; (9%); generalist (8%); children (8%); music (7%) and documentary channels (7%). The aggregated total of these top seven genres was the equivalent of 72% of all television channels established in the 28 EU Member States. The results were similar for the EUR 40 countries and Morocco.
- Over 80% of all pay-on-demand audiovisual services established in the EU by 2017 were divided between two genres. Unlike for linear services where genre distribution was more balanced, pay-on-demand genres were more concentrated, with the top four accounting for 92% of the total share: 65% film and TV fiction/series; 17% generalist; 7% adult and 3% children. Similar results were yielded for the EUR 40 countries and Morocco.
- When comparing these pan-European figures to localised TV services, results showed that six out of the top seven genres were identical: film and TV fiction/series (26%); documentary (16%); children (15%); sport (15); entertainment (10%) and lifestyle/leisure/health/travel (8%). While generalist channels featured more prominently among the overall number of linear services established in the EU28, the genre lifestyle/leisure/health/travel was more common among localised TV channels. The results were similar for the EUR 40 countries and Morocco.
- Figures for pay-on-demand services show that the top two genres of localised versions were identical to those of the general population of services established in the EU28. Genre concentration tended to be significantly higher among localised services, with the aggregated shares of film and TV fiction/series and generalist pay-on-demand services constituting 94%, while the figure for the entire population of services was 82%. Similar results were yielded for the EUR 40 countries and Morocco.

Figure 7. Breakdown by genre of localised audiovisual media services established in the EU28 (2017) – In % share



Source: European Audiovisual Observatory / MAVISE database

Notes: Television Other includes the genres: Home shopping (1%); Religious (1%); Cultural/educational (1%); Generalist (1%); Other/not identified and International linguistic and cultural (<1% each); Pay-on-demand Other* includes the genres: Other/not identified (3%); Entertainment; Adult; Lifestyle/leisure/health/travel; Sport; Documentary; Cultural/educational; News/business (<1% each).*

Figure 8. Breakdown by genre of all audiovisual media services established in the EU28 (2017) – In % share

Source: European Audiovisual Observatory / MAVISE database

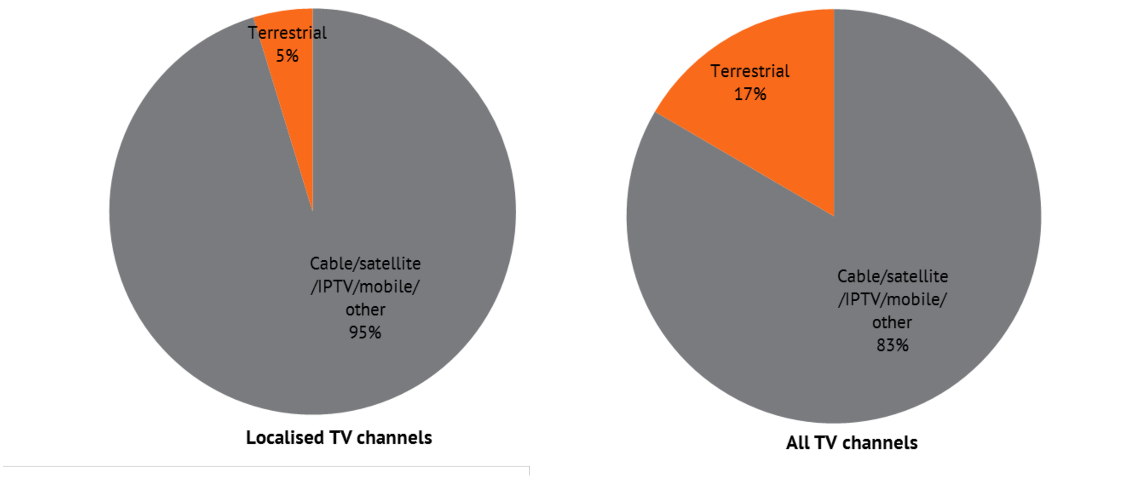
Notes: Television Other includes the genres: Other/not identified (3%); Religious (2%); International linguistic and cultural (2%); Cultural/educational (2%); Parliamentary/government/administration (<1%); Pay-on-demand Other* including the genres: Other/not identified (2%); Music (1%); Entertainment (1%); Lifestyle/leisure/health/travel (1%); Sport (1%); Documentary (1%); Cultural/educational and News/business (<1% each).*

1.3. Distribution and business models of audiovisual media services in Europe

Pan-European trends: Pay-TV and SVOD dominate business models

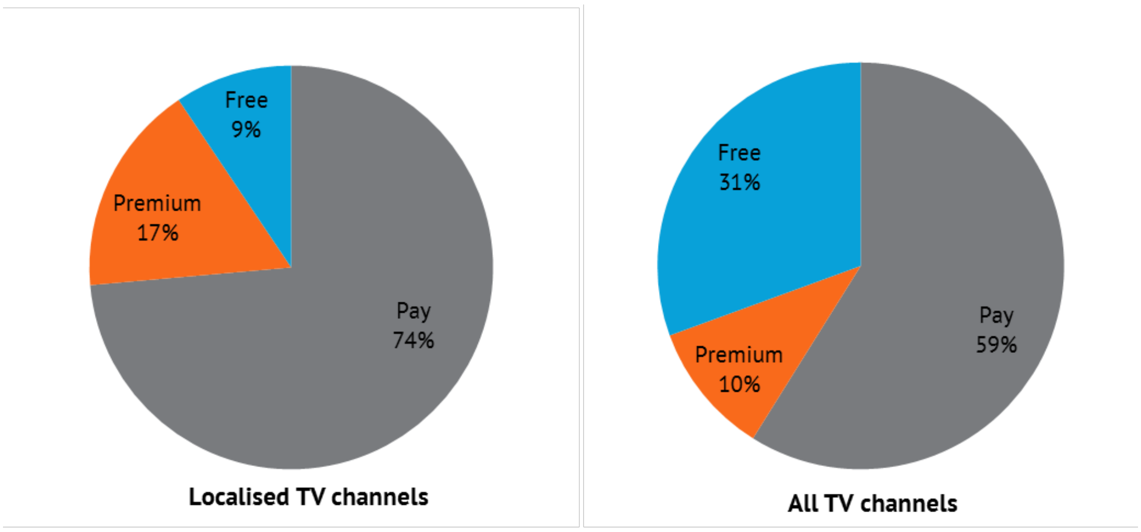
- Nearly one out of five television services established in the EU28 by 2017 was accessible via digital terrestrial television (17%), and the rest could be accessed via cable, satellite, or Internet protocol television (IPTV). The majority of television channels were pay and/or premium services while 31% were available free-to-air. Localised versions of TV channels were less likely to be accessible via digital terrestrial television (DTT) (5%) and only 9% were accessible free-to-air. The results were similar for the EUR 40 countries and Morocco.
- The vast majority (63%) of pay-on-demand audiovisual services based in the EU28 were accessible online only. A total of 15% offered managed access through a set-top box. And 8% offered managed access through a set-top box, complemented by over-the-top (OTT) applications. Online-only access was more pronounced among localised services (77%). The preferred business model for both the full array of pay-on-demand services and those with localised versions was subscription video-on-demand (60% and 64%, respectively). Similar results were yielded for the EUR 40 countries and Morocco.

Figure 9. Breakdown of TV channels established in the EU28 by kind of licence (2017) – In % share



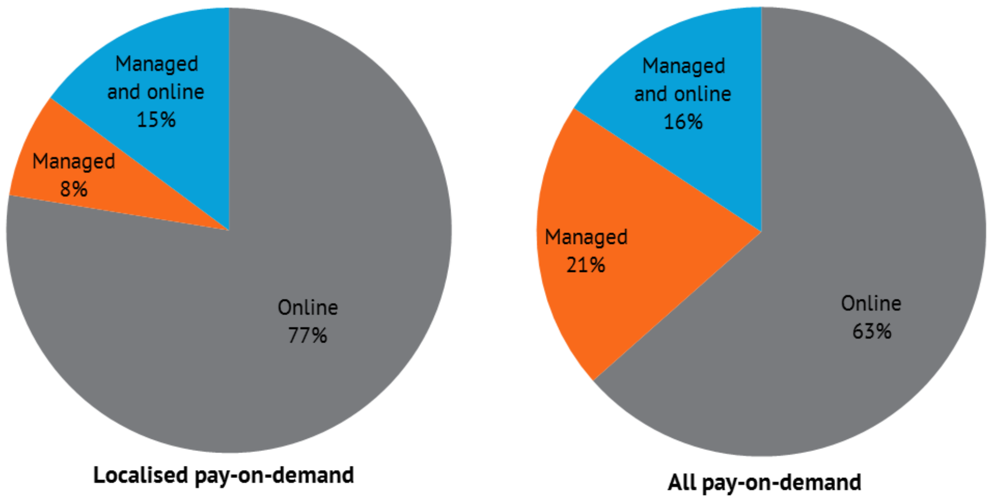
Source: European Audiovisual Observatory / MAVISE database

Figure 10. Breakdown of TV channels established in the EU28 by access (2017) – In % share



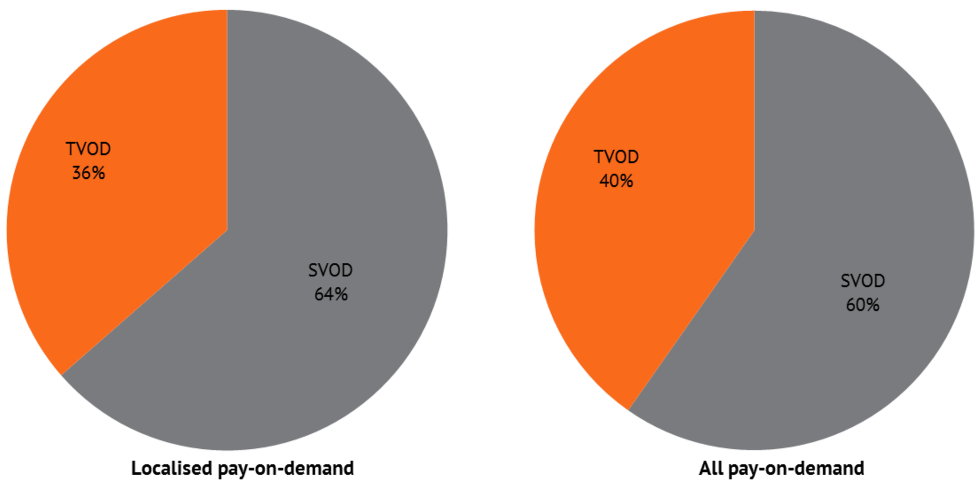
Source: European Audiovisual Observatory / MAVISE database

Figure 11. Breakdown of pay-on-demand audiovisual services established in the EU28 by distribution (2017) – In % share



Source: European Audiovisual Observatory / MAVISE database

Figure 12. Breakdown of pay-on-demand audiovisual services established in the EU28 by business model (2017) – In % share



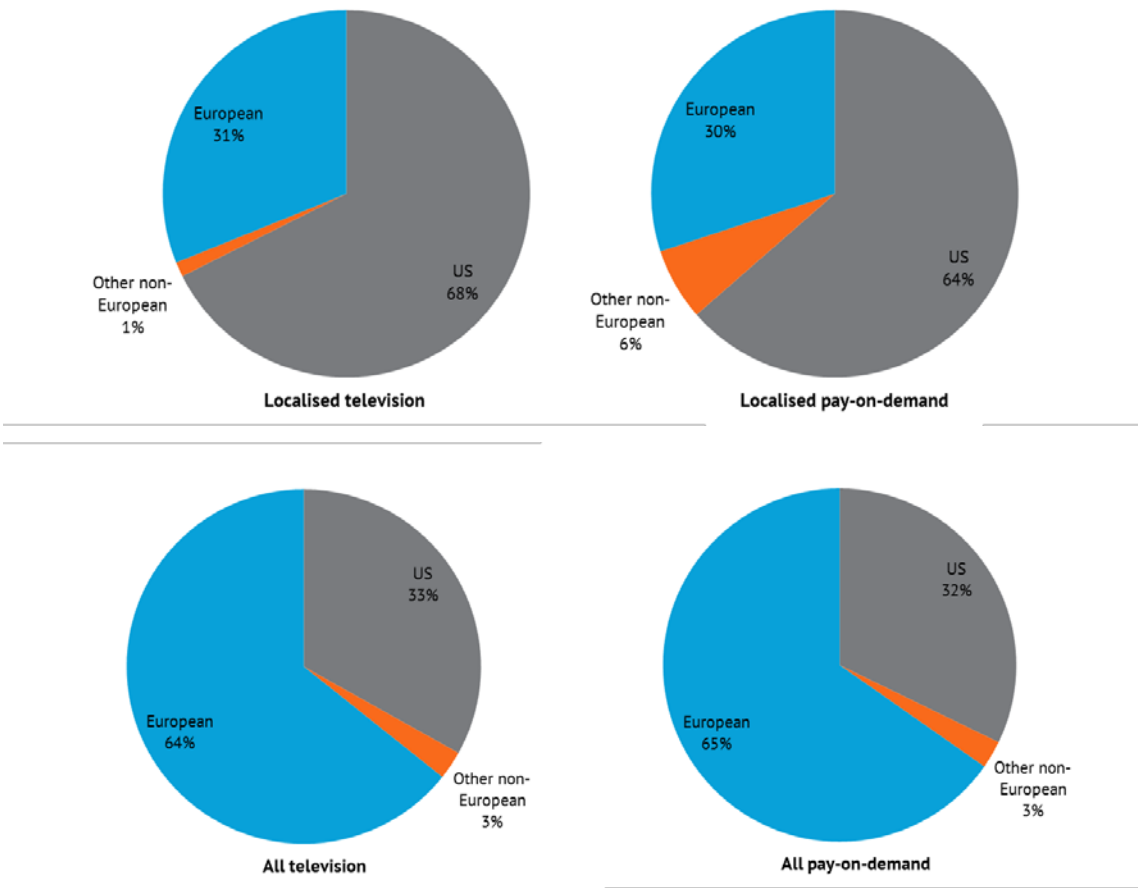
Source: European Audiovisual Observatory / MAVISE database

1.4. Ownership structures

Pan-European trends: Localised media services tend to be US-owned

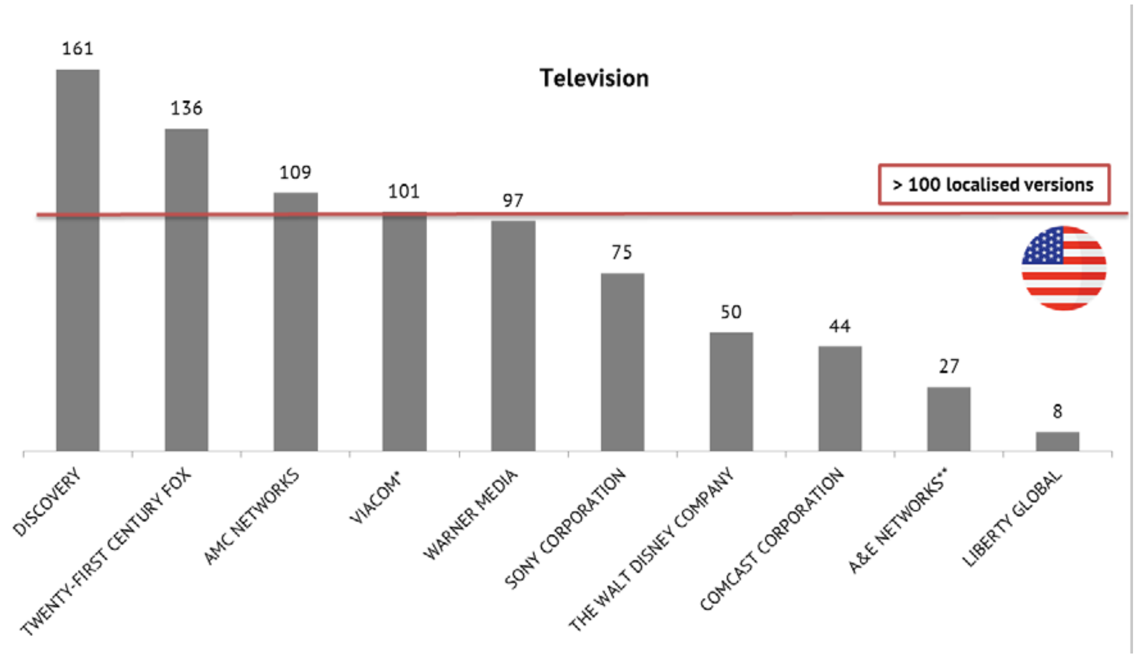
- Localised audiovisual media services were more likely to be US-owned than the average media service established in the EU. Two thirds of EU-based service providers of localised TV channels and pay-on-demand services belonged to a US parent company. The share among TV channels was somewhat higher (68%) than the one for pay-on-demand services (64%). The ratio of shares was reversed when looking at all audiovisual services established in the EU: services with US ownership make up one third, compared to two thirds with a European parent group.
- Among the top US groups offering the largest bouquets of localised television channels - with more than 100 services - established in the EU28 were Discovery (161), Twenty-First Century Fox (136), AMC Networks (109) and Viacom (101). Other US groups with significant numbers of localised TV channels included Warner Media (97), Sony Corporation (75), The Walt Disney Company (50), Comcast Corporation (44), A&E Networks and Liberty Global (8). The top US groups providing more than 10 localised pay-on-demand services established in the EU28 included three major technology companies, with Amazon coming first (33), followed by Apple (25) and Netflix (18) in fourth place. Other top US groups offering EU-based pay-on-demand services included Warner Media (23), Liberty Global (17), Sony Corporation (12), and Twenty-First Century Fox (10).
- The top European groups providing more than 10 localised television channels established in the EU28 were Swedish-based Kinnevik (122) and Albert Bonnier (36), followed by Luxembourg-based United Media (27), German Bertelsmann (22), Romanian RCS Management (13), German Da Vinci Media (11), Croatian Duplicato Media (10) and French Vivendi (10). Other companies with a significant number of localised TV channels were Slovak Mega Max Media (8) and Serbian Telekom Srbija (7). European groups with more than five localised pay-on-demand services included Swedish Albert Bonnier (12), Cypriot Vaskiani Ventures (10), Swedish Kinnevik (8), Norwegian Telenor (6), Belgian Home Entertainment Services (6) and German Pantaflix (6).
- Examples of international groups with a significant number of localised audiovisual services established in the EU28 included Egyptian Media Globe Networks with its 13 versions of Euronews. Other international groups providing pay-on-demand services included Japanese Rakuten with seven localised versions of WuakiTV and Dominican-based Filmaxi with five localised versions of its service Banaxi.
- Seven of the top 10 US groups offering localised television channels established in the EU28 also provided a significant number of localised pay-on-demand services (⩾10). By comparison, only two of the top European companies did so: Swedish companies Albert Bonnier and Kinnevik. While US groups offering localised services tended to be large vertically integrated media corporations with a diversified portfolio, European groups were likely to be horizontally integrated corporations with a tendency to focus on a single part of the industry value chain.

Figure 13. Breakdown of localised vs. all audiovisual media services established in the EU28 by origin of ownership (2017) - In % share



Source: European Audiovisual Observatory / MAVISE database

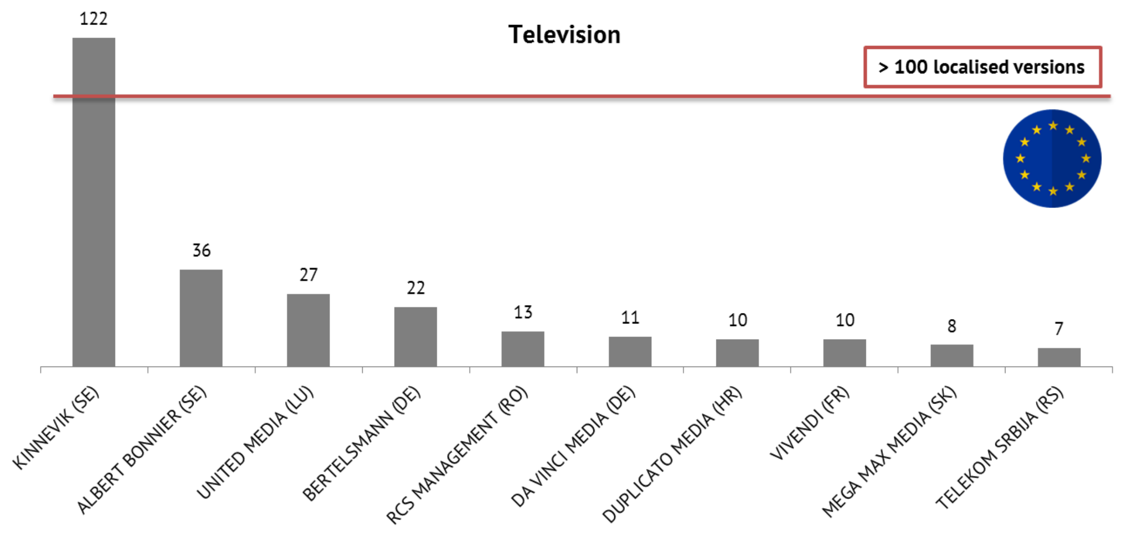
Figure 14. Top 10 US companies providing localised TV channels established in the EU28 (2017) – In number of services



Source: European Audiovisual Observatory / MAVISE database
*Notes: *Ultimate owner is Sumer M. Redstone National Amusements Trust.*

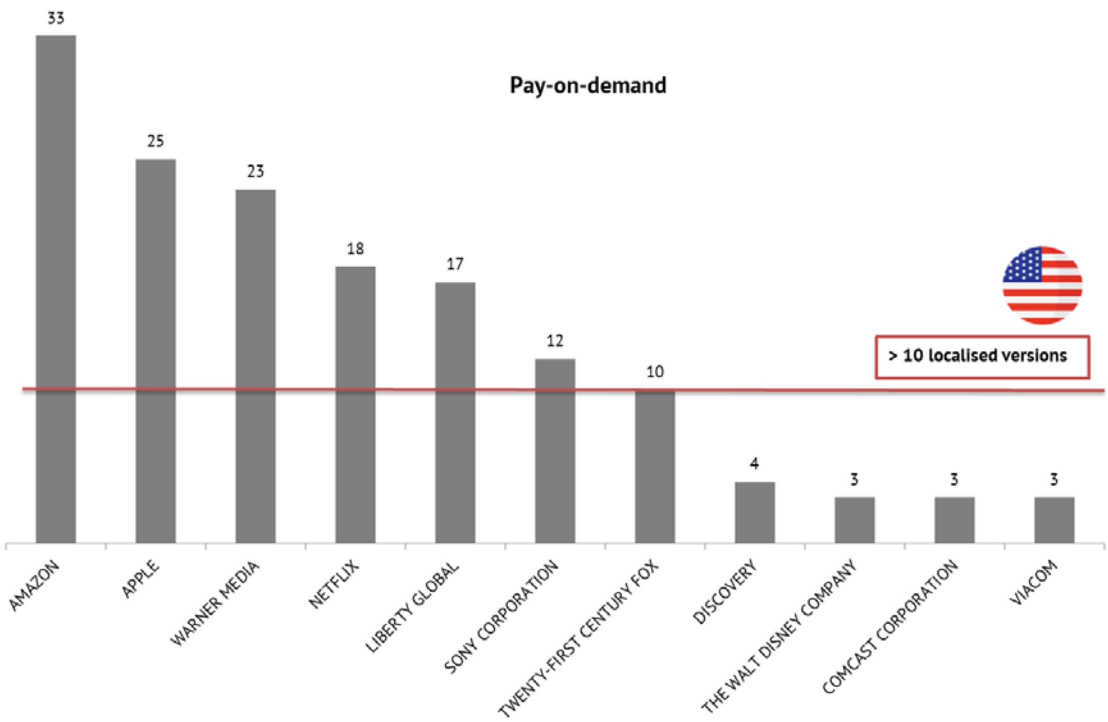
*** Joint venture btw. The Hearst Communications and Disney-ABC Television Group.*

Figure 15. Top 10 European companies providing localised TV channels established in the EU28 (2017) – In number of services



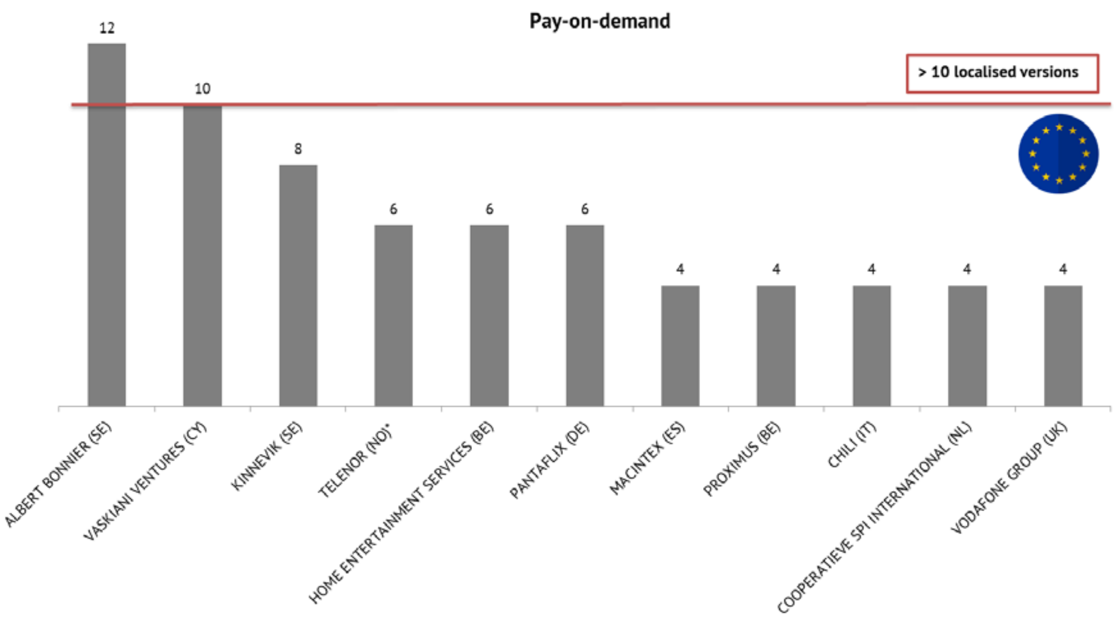
Source: European Audiovisual Observatory / MAVISE database

Figure 16. Main US companies providing localised pay-on-demand services established in the EU28 (2017) – In number of services



Source: European Audiovisual Observatory / MAVISE database

Figure 17. Main European companies providing localised pay-on-demand services established in the EU28 (2017) – In number of services



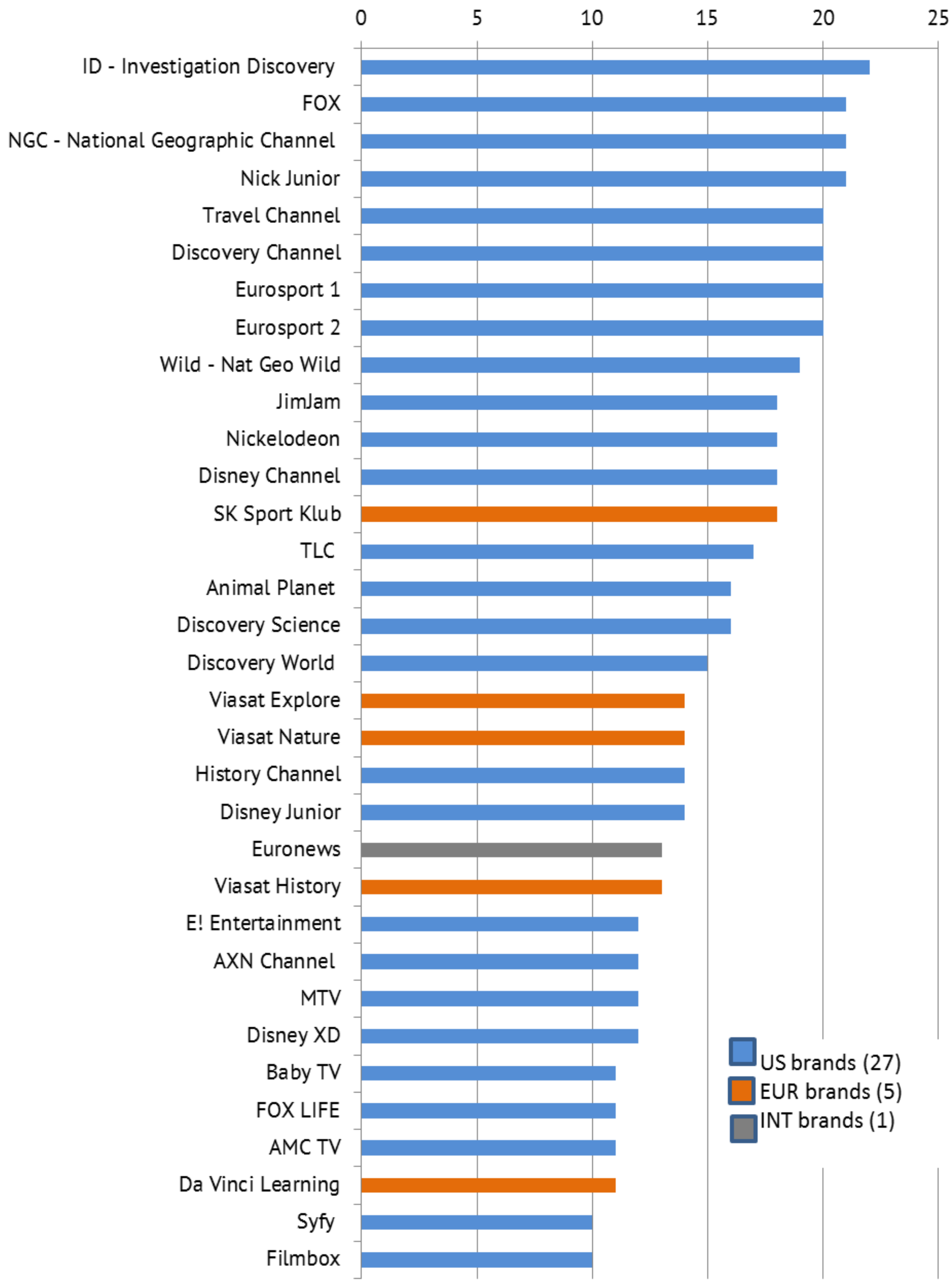
*Source: European Audiovisual Observatory / MAVISE database; Note: *Final shareholder is State of Norway*

1.5. Brands of localised TV channels and pay-on-demand services

Pan-European trends: Top audiovisual brands are US-centric

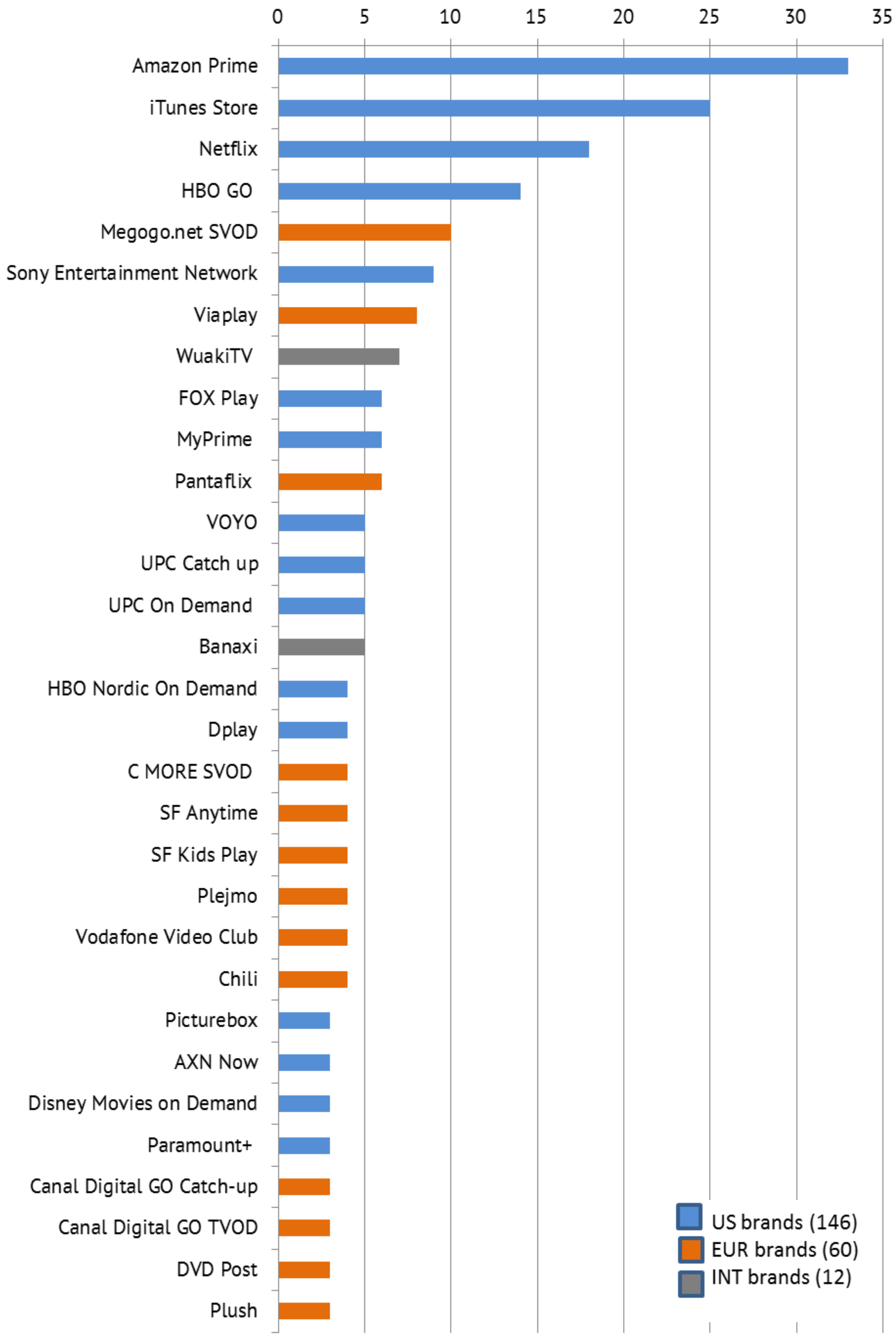
- While Amazon Prime, iTunes Store, Netflix and HBO Go accounted for only 13% of pay-on-demand services established in the EU28, they represented 38% of services when localised versions are considered. Similarly, while the top TV brands of US groups Discovery, Twenty-First Century Fox, Viacom and AMC Networks accounted for just 5% of TV channels established in the EU28, they represented 15% among localised services. This translates into market dominance among EU-based audiovisual service providers.
- The top TV channel brands available as localised versions were highly concentrated: eight of the top 10 TV channel brands were American, while 14% were European brands and 3% represented other international brands. The most widely circulated TV brand in terms of localised versions was Discovery's ID – Investigation Discovery (22), closely followed by Twenty-Frist Century Fox's Fox, NGC – National Geographic Channel and Viacom's Nick Junior (21 each), AMC Network's Travel Channel, and Discovery's Discovery Channel and Eurosport 1 + 2 (20 each).
- European TV channel brands featuring in the top list were Luxembourg-based United Media's SK Sport Klub (18), Swedish-based Kinnevik's Viasat Explore (14), Viasat Nature (14) and Viasat History (13), and German-based Da Vinci Media's Da Vinci Learning (11).
- The top pay-on-demand brands were less US-centric than their TV channel counterparts: while two-thirds were American brands, over a quarter were European brands and 6% were other international brands. The most widely circulated pay-on-demand brands in terms of localised versions were the ones offered by some of the leading US technology companies: Amazon Prime (33), iTunes Store (25) and Netflix (18), followed by Warner Media's HBO Go (14).
- The leading European pay-on-demand service was Cypriot Vaskiani Ventures' Megogo.net (10), followed by Swedish Kinnevik's Viaplay (8) and German Pantaflix (6) in fifth, seventh and 11th place, respectively. Significant international pay-on-demand services were WuakiTV (7) by Japanese Rakuten and Banaxi (5) by Dominican Filmaxi.

Figure 18. Top TV channel brands established in the EU28 (2017) – In number of localised services



Source: European Audiovisual Observatory / MAVISE database

Figure 19. Top pay-on-demand brands established in the EU28 (2017) – In number of localised services



Source: European Audiovisual Observatory / MAVISE database

Table 3. US TV channel brands established in the EU28 (2017) – Ranked by number of localised services

US PARENT COMPANY	TV CHANNEL BRAND NAMES	LOCALISED VERSIONS
DISCOVERY	Animal Planet, Discovery Channel, Discovery History, Discovery Science, Discovery Turbo, Discovery World, DMAX, Eurosport 1, Eurosport 2, Eurosportnews, ID - Investigation Discovery, TLC	161
TWENTY-FIRST CENTURY FOX	24 Kitchen, Baby TV, Fox, Fox Comedy, Fox Crime, Fox Life, Fox Movies, Fox Sports, Nat Geo People, NGC - National Geographic Channel, Wild - Nat Geo Wild, Sky 1, SKY 3D, Sky Atlantic, Sky Cinema, Sky Cinema Comedy, Sky Cinema Family, Sky Cinema Hits, Sky Sport 1, Sky Sport 2	136
AMC NETWORKS	A&E, AMC TV, Canal Hollywood, Canal Panda, CBS Reality, Extreme Sports Channel, Film Café, FLN - Fine Living Network, Food Network, Horror Channel, JimJam, Megamax, MGM, Minimax, Odisea, Spektrum TV, Sport 1(2), Sundance Channel, The Outdoor Channel, Travel Channel, TV Paprika	109
VIACOM*	Comedy Central, Comedy Central Extra, Comedy Central Family, MTV, Nick Junior, Nick Toons, Nickelodeon, Paramount Channel, VH1, VIVA	101
WARNER MEDIA	Adult Swim, Boing, Boomerang, Cartoon Network, Cartoonito, Cinemax, Cinemax 2, HBO, HBO 2, HBO 3, Nova TV, Ring TV, TCM Turner Classic Movies, TNT Turner Network Television	97
SONY CORPORATION	AXN Black, AXN Channel, AXN Spin, AXN White, Fightbox, Filmbox, Filmbox Extra, Filmbox Family, Filmbox Plus, Filmbox Premium, Pop!, Sony Entertainment Television, Sony Sci-Fi, Sony Turbo	75
THE WALT DISNEY COMPANY	Disney Channel, Disney Cinemagic, Disney Junior, Disney XD	50
COMCAST CORPORATION	13th Street, Diva, E! Entertainment, Movies 24, Syfy, Universal Channel	44
A&E NETWORKS**	A&E, Blaze, CI - Crime and Investigation, H2 - History Channel 2, History Channel, Lifetime	27
LIBERTY GLOBAL	QVC, UPC	8
AVG number of localised versions of top 10 US parent companies		**81**

Source: European Audiovisual Observatory / MAVISE database.
*Notes: * Sumer M. Redstone National Amusements Trust.*

*** Joint venture btw. The Hearst Communications and Disney-ABC Television Group.*

Table 4. European TV channel brands established in the EU28 (2017) – Ranked by number of localised services

EUROPEAN PARENT COMPANY	TV CHANNEL BRAND NAMES	LOCALISED VERSIONS
KINNEVIK (SE)	3+, CTC, Nova TV, Trace Sports Stars, Trace Urban, TV1000 Balkan, TV1000 East, TV1000 Premium, TV1000 Premium, Viasat Explore, Viasat Film Action, Viasat Film Comedy, Viasat Film Family, Viasat Film Hits, Viasat Film Premiere, Viasat Fotboll, Viasat Golf, Viasat History, Viasat Hockey, Viasat Motor, Viasat Nature, Viasat Series, Viasat Sport	122
ALBERT BONNIER (SE)	C MORE First, C MORE Fotboll, C MORE Golf, C MORE Hits, C MORE Hockey, C MORE Live, C MORE Series, C MORE SF, C MORE Sport, C MORE Stars	36
UNITED MEDIA (LU)	N1 TV, SK Golf, SK Sport Klub	27
BERTELSMANN (DE)	Auto Motor Sport TV, Film+, Film+2, RTL 2, RTL Crime, RTL Living, RTL Passion, RTL+	22
RCS MANAGEMENT (RO)	Digi Animal World, Digi Film, Digi Sport, Digi World	13
DA VINCI MEDIA (DE)	Da Vinci Learning	11
DUPLICATO MEDIA (HR)	Cinestar Action and Thriller, Cinestar Premiere, Cinestar TV	10
VIVENDI (FR)	Canal+, Canal+ Family, Canal+ Series, Canal+ Sport, TeleToon+	10
MEGA MAX MEDIA (SK)	Kidzone, Kidzone+	8
TELEKOM SRBIJA (RS)	Arena Sport	7
AVG number of localised versions of top 10 European parent companies		**27**

Source: European Audiovisual Observatory / MAVISE database

Table 5. Examples of international TV channel brands established in the EU28 (2017) – Ranked by number of localised services

INTERNATIONAL PARENT COMPANY	TV CHANNEL BRAND NAMES	LOCALISED VERSIONS
MEDIA GLOBE NETWORKS (EG)	Euronews	13
QATAR MEDIA CORPORATION (QA)	beIN Sport, Al Jazeera	3

Source: European Audiovisual Observatory / MAVISE database

Table 6. US pay-on-demand services brands established in the EU28 (2017) – Ranked by number of localised services

US PARENT COMPANY	PAY-ON-DEMAND BRAND NAMES	LOCALISED VERSIONS
AMAZON	Amazon Prime	33
APPLE	iTunes Store	25
WARNER MEDIA	HBO GO, HBO Nordic On Demand, VOYO	23
NETFLIX	Netflix	18
LIBERTY GLOBAL	MyPrime , UPC Catch up, UPC On Demand	17

SONY CORPORATION	AXN Now, Sony Entertainment Network	12
TWENTY-FIRST CENTURY FOX	FOX Play, Now TV Sky, Sky Go Extra	10
DISCOVERY	Dplay	4
THE WALT DISNEY COMPANY	Disney Movies on Demand	3
COMCAST CORPORATION	Picturebox	3
VIACOM*	Paramount+	3
AVG number of localised versions of top 11 US parent companies		**14**

Source: European Audiovisual Observatory / MAVISE database
*Note: * Ultimate owner is Sumer M. Redstone National Amusements Trust.*

Table 7. European pay-on-demand service brands established in the EU28 (2017) – Ranked by number of localised services

EUROPEAN PARENT COMPANY	PAY-ON-DEMAND BRAND NAMES	LOCALISED VERSIONS
ALBERT BONNIER (SE)	C MORE SVOD, SF Anytime, SF Kids Play	12
VASKIANI VENTURES (CY)	Megogo.net SVOD	10
KINNEVIK (SE)	Viaplay	8
TELENOR (NO)*	Canal Digital GO Catch-up, Canal Digital GO TVOD	6
HOME ENTERTAINMENT SERVICES (BE)	DVD Post, Plush	6
PANTAFLIX (DE)	Pantaflix	6
MACINTEX (ES)	Plejmo	4
PROXIMUS (BE)	Proximus Replay TV, Proximus TV Pass	4
CHILI (IT)	Chili	4
COOPERATIEVE SPI INTERNATIONAL (NL)	Filmbox Live, Filmbox on Demand	4
VODAFONE GROUP (UK)	Vodafone Video Club	4
AVG number of localised versions of top 11 European parent companies		**6**

Source: European Audiovisual Observatory / MAVISE database
*Note: *Ultimate owner is the State of Norway.*

Table 8. Examples of international pay-on-demand service brands established in the EU28 (2017) – Ranked by number of localised services

INTERNATIONAL PARENT COMPANY	PAY-ON-DEMAND BRAND NAMES	LOCALISED VERSIONS
RAKUTEN (JP)	WuakiTV	7
FILMAXI LIMITED (DM)	Banaxi	5

Source: European Audiovisual Observatory / MAVISE database

2. Audiovisual media services targeting other countries

The following chapter looks at the impact that audiovisual media services targeting other countries have on national licensing regimes. The first part maps the establishment hubs of broadcasters and service providers based in the EU28 specifically targeting other markets. The second part offers an overview of the most popular genres while the third part provides an analysis of the countries typically targeted by these services.

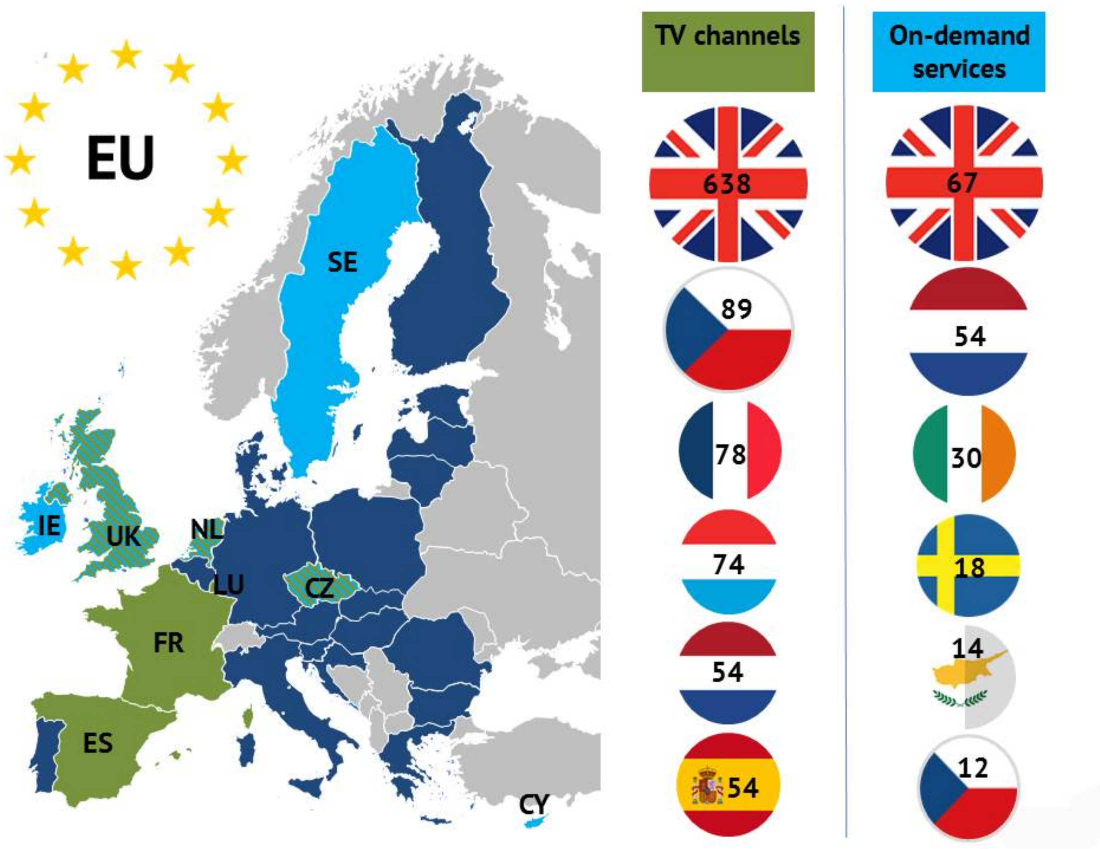
2.1. Establishment hubs

Pan-European trends: United Kingdom main hub for audiovisual services targeting other markets

- The figures in this chapter show a series of hubs in Europe from where audiovisual media services serve several countries. These hubs are home to numerous pan-European brand channels and pay-on-demand services predominantly owned by large broadcasting and entertainment corporations, many of which are of American origin. Around one third of all television channels (31%) and pay-on-demand services (34%) established in the EU28 by 2017 were specifically targeting foreign markets.
- The establishment of services targeting other markets has a significant effect on a number of national licensing regimes as they tend to be regionally concentrated and can notably expand the overall number of services based in a country. Over two thirds of linear and pay-on-demand media services established in the EU by 2017, and targeting foreign markets, were concentrated in just three countries: The cumulated numbers of pay-on-demand services based in the United Kingdom, the Netherlands and Ireland accounted for 67% of all services targeting foreign markets, while linear services in the United Kingdom, the Czech Republic and France comprised 69% of all such services targeting foreign markets. In total, there were 1 167 TV channels primarily targeting other markets.
- The United Kingdom, home to 638 television channels targeting foreign markets, was the most significant European hub for linear services targeting other countries. It was followed by other major TV hubs including: the Czech Republic (89); France (78); Luxembourg (74); the Netherlands (54); and Spain (54). More than half of the channels established in Luxembourg, the United Kingdom and the Czech Republic were targeting foreign markets. Other EU countries with a significant number of television channels under their national licensing regimes, and targeting foreign territories, included: Sweden (43); Bulgaria (25); Germany (25); and Romania (23). At the end of 2017, there were 224 pay-on-demand services catering for specific national markets that were different from their country of establishment.

- As with linear television, the United Kingdom was in 2017 by far the major hub for pay-on-demand audiovisual services targeting foreign markets. In addition, some smaller countries also accounted for a significant share of on-demand services targeting other EU countries. These included: the Netherlands (54); Ireland (30); Sweden (18); Cyprus (14); and the Czech Republic (12). In six countries, including Ireland, the Netherlands, Cyprus, Luxembourg, the United Kingdom and Sweden, more than half of pay-on-demand services established in each territory were targeting foreign markets.
- Localised versions of audiovisual services formed an essential portion of the number of services targeting foreign markets. As many as 79% of pay-on-demand services and 73% of television channels targeting other countries were localised versions.

Figure 20. Central hubs of audiovisual media services established in the EU28 primarily targeting other markets (2017) – In number of services



Source: European Audiovisual Observatory / MAVISE database
© Copyright Showeet.com

Table 9. Audiovisual media services established in the EU28 primarily targeting other markets by country (2017) – In number of services

	Television	Pay-on-demand
UK	638	67
CZ	89	12
FR	78	2
LU	74	8
NL	54	54
ES	54	6
SE	43	18
BG	25	--
DE	25	7
RO	23	--
HR	11	--
PT	10	--
GR	8	--
IT	7	4
CY	6	14
EE	6	--
IE	4	30
AT	3	--
FI	3	--
PL	3	--
LV	2	--
SK	1	--
BE (CFB)	--	2
Total EU 28	**1 167**	**224**

Source: European Audiovisual Observatory / MAVISE database

2.2. Content features

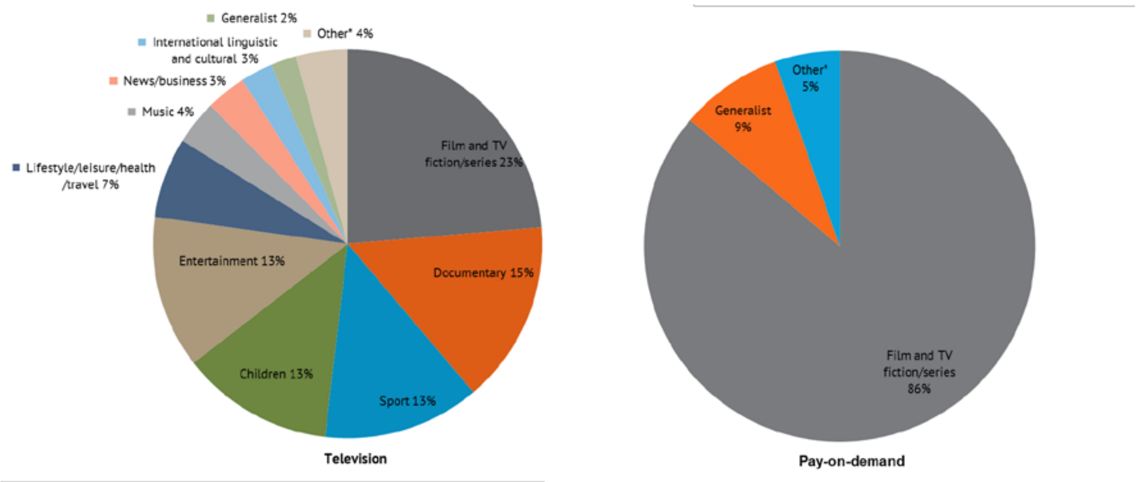
Pan-European trends: Highest genre concentration among localised and targeting audiovisual services

- Three quarters of all television channels established in the EU and targeting foreign markets were in 2017 divided between five genres: film and TV fiction/series (24%); documentary (15%); sport (13%); children (13%); and entertainment (13%). The predominant genre of pay-on-demand services was film and TV fiction/series with 86% of all services established in the EU belonging to this category, and generalist at 8%.
- When comparing the results of targeting services to the genre split of localised audiovisual pay-on-demand services one can observe almost identical results: localised and targeting pay-on-demand services tended to either belong to the genre film and TV fiction/series (over 80%) or were generalist services (12% and

9%, respectively). The genre split was less pronounced among the total number of pay-on-demand services established in the EU of which two thirds belonged to the genre film and TV fiction/series and 17% were generalist services.

- An analysis of EU-established television channels from these three perspectives reveals that localised and targeting channels showed the highest levels of genre concentration: more than two thirds of services belonging to these two categories were split between four genres, compared to just half for the overall number of TV channels.

Figure 21. Breakdown by genre of EU-based audiovisual media services targeting other markets (2017) – In % share



Source: European Audiovisual Observatory / MAVISE database
Notes: Television Other includes the genres: Adult; Religious; Cultural/educational; Other/not identified (1% each); and Home shopping (<1%); Pay-on-demand other* includes the genres: Children; Other/not identified; Lifestyle/leisure/health/travel (1% each); and Adult, Documentary, Music, Sport (<1% each).*

2.3. Target countries

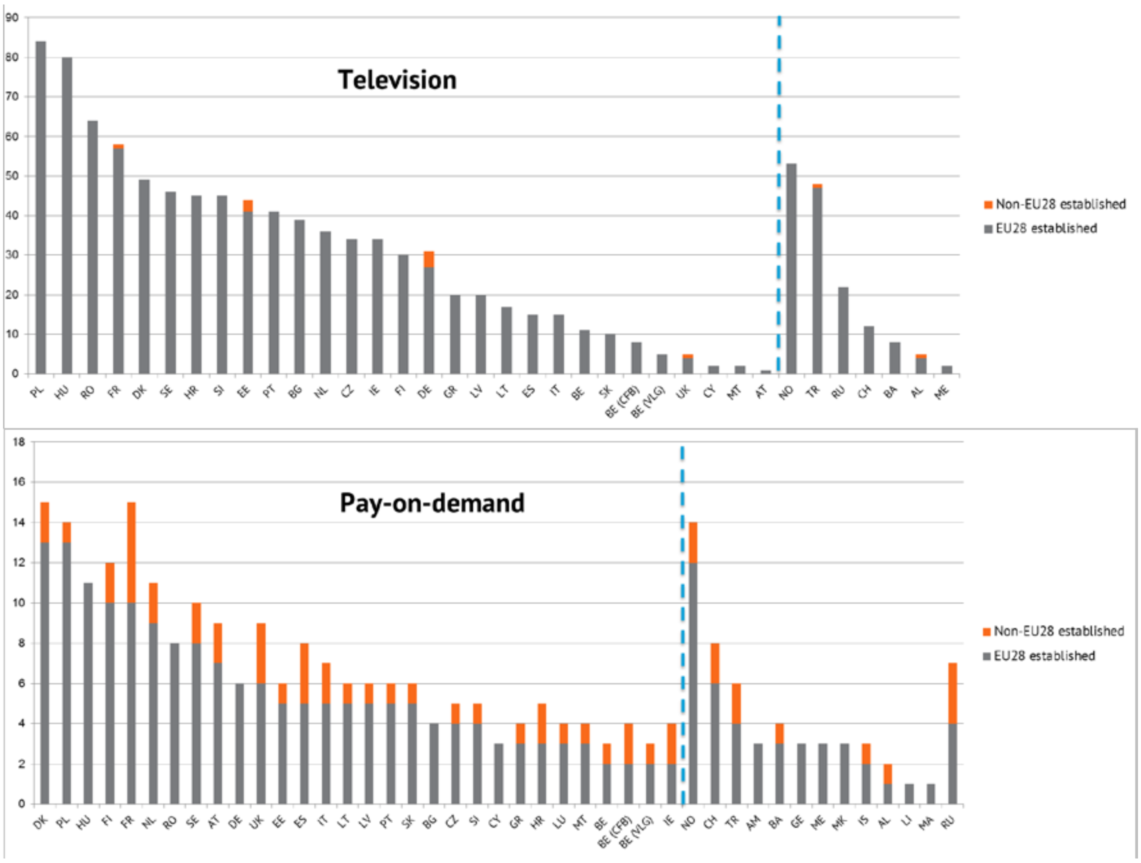
Pan-European trends: Pay-on-demand services more likely to target from outside EU than TV channels

- A typical target country tended in 2017 to fall into one of the following categories: a) clusters of audiovisual markets in regions with marked by cultural proximities (Nordic, Baltic, Central European countries and countries that share a joint language with countries where targeted services were based); and b) larger national audiovisual markets (e.g. Poland, France, Germany).
- There were, in 2017, 21 European countries targeted by at least 20 different linear services (18 EU countries, plus Norway, Turkey, and the Russian Federation), most of which were established in the EU28. Further, six European countries (five EU

countries, plus Norway) were targeted by at least 10 different pay-on-demand services. The EU28 countries with over 50 TV channels specifically targeting their territories were: Poland, Hungary, Romania, and France; plus Norway as the only non-EU country. The EU28 top target countries for pay-on-demand services were: France, Denmark, Poland and Finland; plus Norway (n>10). There were more pay-on-demand services targeting European markets from non-EU-based establishment hubs than was the case for linear services.

- Some countries were characterised by a slightly elevated number of foreign pay-on-demand services not based in the EU28, targeting their territories. The main reason for this is that the main language in these countries is spoken by large populations which are often served with dedicated localised services by providers. This is the case in France, the United Kingdom and the Russian Federation. Examples of international pay-on-demand services targeting France include Afrostream, Eurochannel, FilmStruck, Google Play, Microsoft Store – Movies & TV as well as MUBI France, all of which are based in the US. International pay-on-demand services targeting the United Kingdom include, for example, US-based services FilmStruck, Google Play and Microsoft Store – Movies & TV, as well as Swiss-based i-concerts. The Russian Federation was specifically targeted by US-based services Amazon Prime (Russia), iTunes Store (RU) and MUBI Russia.
- It should be noted that the main players for pay-on-demand services are based in the United Kingdom (Amazon Prime), the Netherlands (Netflix) and Ireland (iTunes Store) while Google Play continues to operate from the United States, as does Microsoft Store.

Figure 22. Origin of audiovisual media services targeting other markets (2017) – In absolute numbers by country



Source: European Audiovisual Observatory / MAVISE database

3. Broadcasting languages in Europe

The following chapter looks at audiovisual media in Europe from a consumer perspective by mapping the diversity of the European TV and on-demand services market in terms of language. The first part provides an overview of the broadcasting languages of TV channels available in each national market. The second part focuses on the weight of audiovisual media services available in the main official language of a country. The third and last part explores the different languages of national TV channel offers available to people living in the country.

3.1. Mapping broadcasting languages in Europe

Pan-European trends: France most diverse market

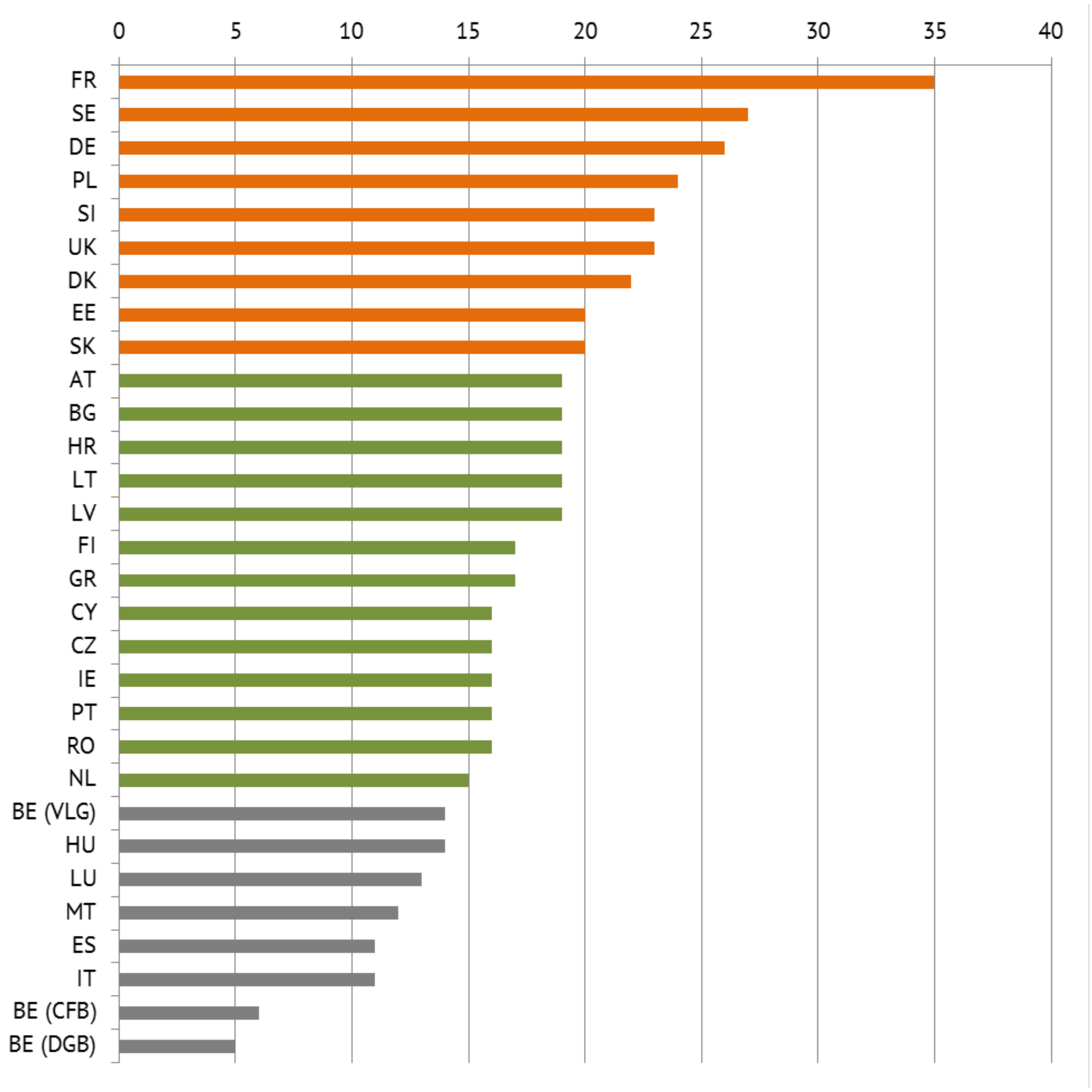
- A total of 61 different languages were being broadcast across the EU28 at the end of 2017. In 11 other European territories covered by the European Audiovisual Observatory the total number of TV broadcasting languages was 45. Combining both country groups, the number of broadcasting languages rises to 64 in total.
- In the EU people had access to TV channels in 19 different broadcasting languages on average. France was the most diverse market with 35 different broadcasting languages available in the country, including Arabic, Turkish and Mandarin Chinese as well as Hebrew, Tamil and Urdu. Italy and Spain were the most homogenous markets with 11 languages in each territory. The top eight countries where national TV offers comprised 20 or more broadcasting languages included Sweden (27), Germany (26), Poland (24), Slovenia (23), the United Kingdom (23), Denmark (22), and Estonia and Slovakia (20 each). In other European countries covered by the European Audiovisual Observatory, Switzerland (25), Norway (20), and Turkey (20) offered the highest number of TV broadcasting languages.
- More than half of all TV channels in Iceland were broadcast in English - the highest share in Europe by territory, closely followed by Malta with 47% of services broadcast in English. The additional six European countries where more than one quarter of TV channels available were shown in English include Cyprus (30%), Portugal (26%), Norway (26%), Croatia (26%), Finland (25%) and Greece (25%).
- When looking at other significant broadcasting languages, excluding English, results show that the share of Russian-language TV channels in Armenia (78%)

and Georgia (53%) was significantly greater than that of any other broadcasting language. In the EU, Russian was an important broadcasting language in the Baltic States Lithuania (44%), Latvia (42%) and Estonia (41%). Other EU countries where more than one fourth of TV channels available broadcast in a language other than the official one or English included Belgium [French-speaking Community (37%); German-speaking Community (48%); also a number of Dutch channels available], Luxembourg [German TV channels (39%)] and the Slovak Republic [Czech-language channel share (26%)].

Figure 23. TV broadcasting languages across Europe (2017) – In average numbers

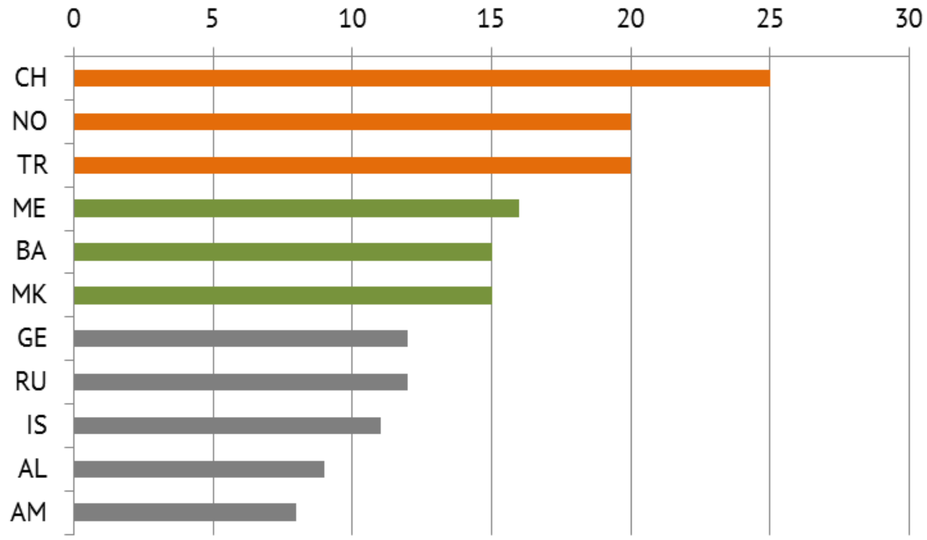
Source: European Audiovisual Observatory / MAVISE database

Figure 24. TV broadcasting languages available by country in the EU28 (2017) – In average numbers



Source: European Audiovisual Observatory / MAVISE database

Figure 25. TV broadcasting languages available by country in other European countries (2017) – In average numbers



Source: European Audiovisual Observatory / MAVISE database

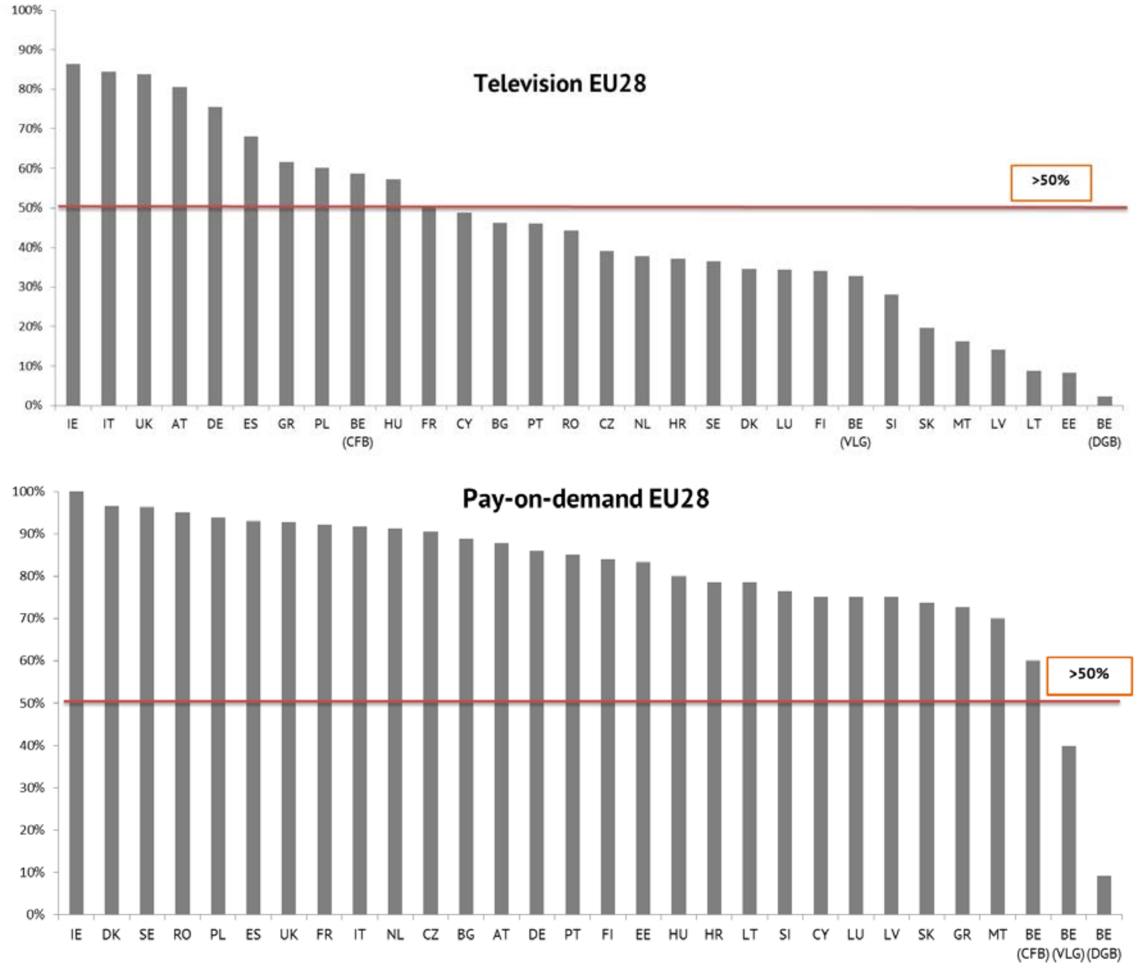
3.2. Share of services available in official languages

Pan-European trends: Pay-on-demand offers more localised than TV offers

- In 40% of EU Member States people could in 2017 watch at least half of the TV channels on offer in their country's main official language. This included Ireland (86%), Italy (84%), the United Kingdom (84%), Austria (81%), Germany (75%), Spain (68%), Greece (62%), Poland (60%), Belgium (French Community 59%), Hungary (57%) and France (50%). In Lithuania, Estonia and the German-speaking Community of Belgium, less than 10% of TV offers were available in Lithuanian (9%), Estonian (8%) and German (2%), respectively. In the other European countries covered by the European Audiovisual Observatory , results showed that people living in Russia, Turkey and Albania had access to more than 50% of television channels in their native languages Russian (87%), Turkish (77%) and Albanian (72%).
- Pay-on-demand offers were fewer in number and more localised than TV channel offers. In the EU28, at least 60% of pay-on-demand services available in each market were versions with a local language user-interface, with the exception of Belgium [Flemish-speaking Community (40%) and German-speaking Community (9%)]. In two out of five countries, over 90% of pay-on-demand services available were versions with a local language user-interface. This included Ireland (100%), Denmark (97%), Sweden (96%), Romania (95%), Poland (94%), Spain and the United Kingdom (93% each), France and Italy (92% each), the Netherlands (91%)

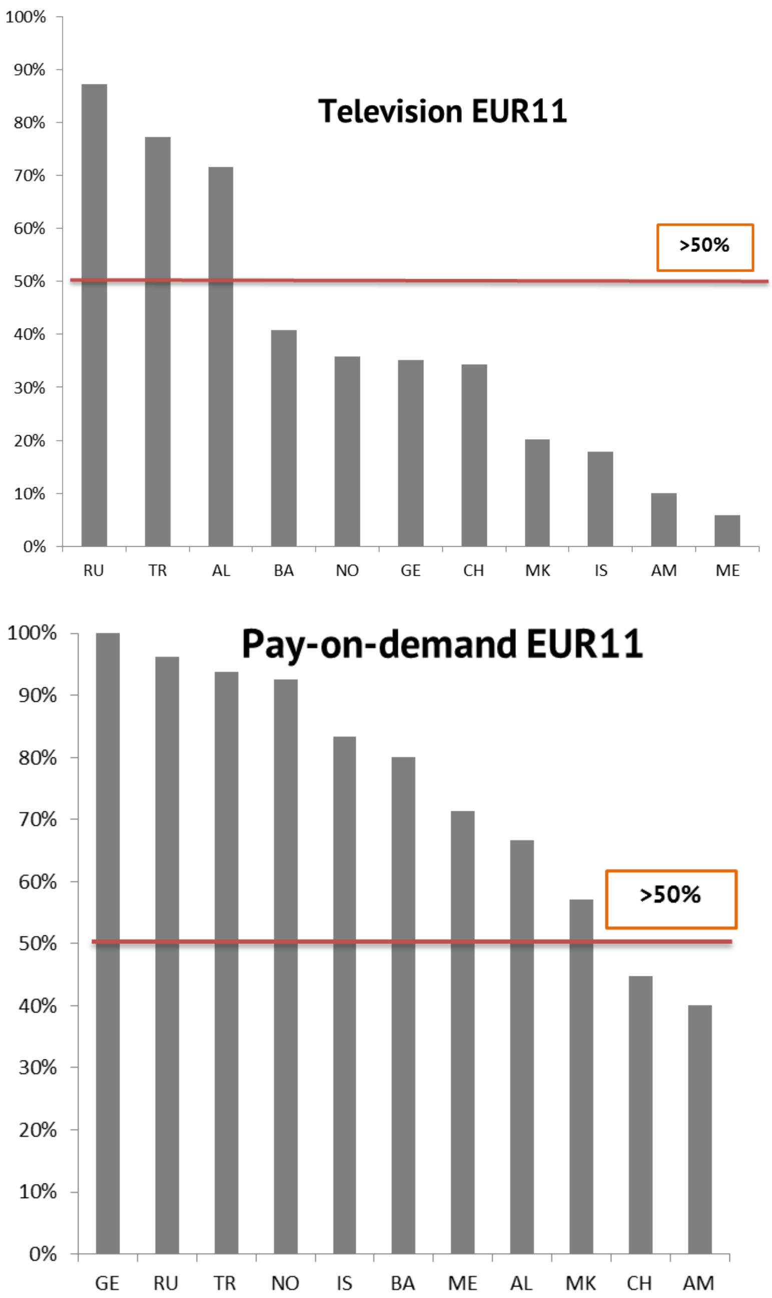
and the Czech Republic (90%). This trend was also reflected in the other European countries covered by the European Audiovisual Observatory, where over 50% of pay-on-demand services were available in nine additional national markets. Markets below the 50% threshold were Switzerland (45%) and Armenia (40%).

- Share of main official language among national TV and pay-on-demand offers in the EU28 (2017) - In average %



Source: European Audiovisual Observatory / MAVISE database

Figure 26. Share of main official language among national TV and pay-on-demand offers in other European countries (2017) - In average %



Source: European Audiovisual Observatory / MAVISE database
*Note: *No data available for Liechtenstein and Morocco.*

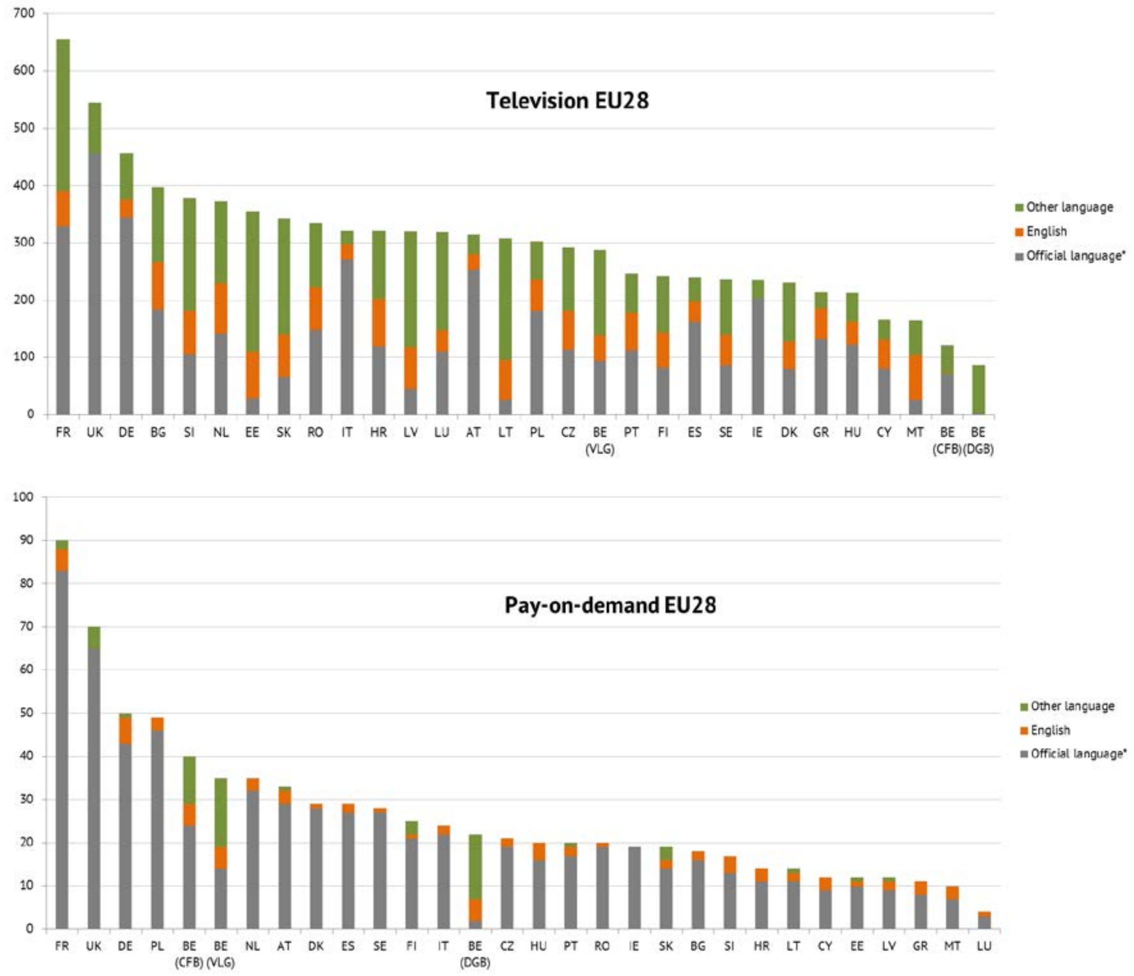
3.3. TV channel offers by language

Pan-European trends: United Kingdom, Germany and France enjoy broadest TV offer in native languages

- People living in EU countries such as the United Kingdom (456), Germany (345) and France (329) enjoyed the highest number of TV channels available in the main official language of the country. Other countries with a high number of TV channels available in the main official language included Italy (271), Austria (245) and Ireland (203). Results for the other European markets covered by the European Audiovisual Observatory showed that people living in the Russian Federation (522) and Turkey (346) also enjoyed broad offers of TV channels available in their native language.
- People living in France (83), the United Kingdom (65), Poland (46) and Germany (43) had access to the highest number of pay-on-demand services with user-interfaces in the official languages of these EU countries. Among the other European countries covered by the European Audiovisual Observatory, people living in the Russian Federation (25), Norway (25), Switzerland (21) and Turkey (15) enjoyed a significant selection of pay-on-demand services with user-interfaces in the official languages of their respective countries.
- In a number of EU countries the TV channel offers available in the official language were significantly narrower than those in English and other broadcasting languages. This was the case in the Baltic States, Malta and Slovakia. In the Baltic States only around one in 10 TV channels was available in Estonian (8%), Lithuanian (9%) and Latvian (14%). While English-language channels represented approximately one quarter of TV channels available, Russian-language channels took over 40% of the share of TV channels available in each of these countries. In Malta, the share of TV channels in Maltese (16%) was outnumbered by those available in English (47%) and Italian (20%). And in Slovakia, the 20% share of TV channels available in Slovak was surpassed by the 21% of services in English and 26% in Czech. Examples of countries where TV channels in the main official language were outnumbered by other language services can also be found among other European countries covered by the European Audiovisual Observatory, including Armenia, where four out of five TV channels were in Russian (79%) and Georgia, where over half of the TV channels were available in Russian. The dominant broadcasting language in Iceland was English, with over 50% of TV channels compared to 18% available in Icelandic. In Montenegro people could watch 6% of TV channels available in the country in Montenegrin, while 40% of TV channels were in Serbian and 15% in English.
- In contrast to TV services, pay-on-demand services in other languages than the official one are fewer. This is largely due to the nature of the business model of pay-on-demand services which tend to be either national or localised services offered by international companies which specifically cater to a particular market with a linguistically adapted user-interface. Examples of services in English mostly

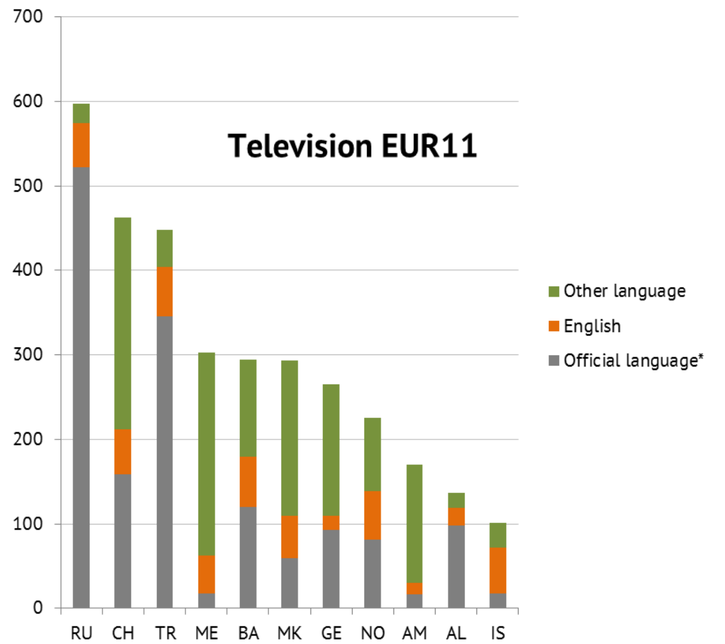
constitute international pay-on-demand services for which a localised version does not yet exist.

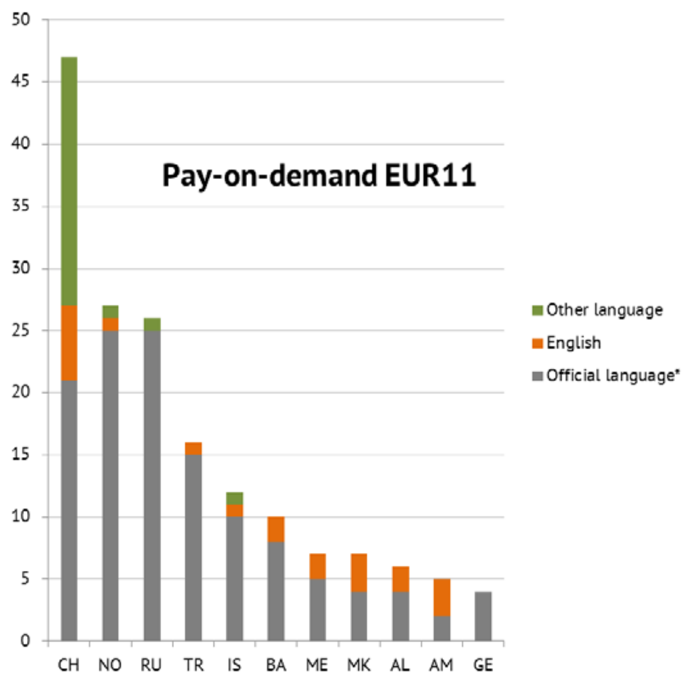
Figure 27. Audiovisual media services available by language in the EU28 (2017) – In average numbers



Source: European Audiovisual Observatory / MAVISE database
*Note: *Official language refers to main official language of a country.*

Figure 28. Audiovisual media services available by language in other European countries – In average numbers





Source: European Audiovisual Observatory / MAVISE database
*Note: *Official languages in Switzerland are German/French/Italian with German being referred to in figures; those in Bosnia-Herzegovina are Serbian/Bosnian/Croation with Serbian being referred to in figures.*

4. Annexes

4.1. Methodological overview for linear and on-demand audiovisual services

This section provides a methodological overview of how the data in this report was collected, measured and categorised. The scope of data includes 40 European countries covered by the European Audiovisual Observatory as well as Observatory member Morocco. The data reflects the situation in these national markets at the end of 2017.

All data concerning linear and on-demand audiovisual media services established or available in the countries quoted in this report originated from the European Audiovisual Observatory and its MAVISE database. MAVISE is a database on TV and on-demand audiovisual services and companies in Europe designed to ameliorate understanding of the audiovisual market and generate greater transparency.

4.1.1. Linear audiovisual media services

Definition of localised versions of TV channels

An audiovisual media service is considered multi-linguistic when at least two different language versions of the same channel exist. The programming must be identical but in another language.

The definition above excludes RTL (Switzerland) and RTL (Germany) as they have identical programming but in the same language. It also excludes MTV (version in Latvian) as the channel programming is based on a mix of English and Latvian, while MTV Italy is included (entire programming in Italian).

Sample

Regional and local audiovisual media services are generally excluded from the sample (included are pan-European/international, national, several countries and worldwide services).

The sample of TV channels includes all services established in the member countries covered by the European Audiovisual Observatory. Exceptions to this rule are TV channels established in other countries and which may provide services relevant to the European market. Examples of TV channels excluded from the sample are as follows:

Channel name	Genre	Country of establishment
CGTN - CCTV (Arabic)	International linguistic and cultural	China
CGTN - CCTV (French)	International linguistic and cultural	China
CGTN - CCTV (Spanish)	International linguistic and cultural	China
i24News (Arabic)	News/ Business	Israel
i24News (English)	News/ Business	Israel
i24News (French)	News/ Business	Israel
Al Jazeera (Arabic)	News/ Business	Qatar
Al Jazeera (Türk)	News/ Business	Qatar
BYU TV (21 linguistic versions)	Religious	United States

Ownership

US services refers to all US-American companies. The sample also includes cases of co-ownership where one joint company is of US origin.

Services established in the Russian Federation

In cases where the MAVISE database holds Russian-language versions of the same channel due to different existing licences, then only one (European-licensed) TV channel is considered as a default. Examples include Fox (Russian RKN) and Fox (Russian), the latter of which is licensed in Bulgaria. Other examples are FOX LIFE (Russian RKN) and FOX LIFE (Russian) which is licensed in Spain. Another example is JimJam Middle East (Russian RKN) and JimJam Middle East (Russian).

Services where the ownership situation was not clear were also excluded from the sample. Due to rules put in place in the Russian Federation that limit foreign ownership in media enterprises to a maximum of 20%, brands based in Europe and Russia could not unambiguously be reconciled. Some channels, for example, kept the brand but are managed by different companies. This concerns, for example, the TV channels AMC TV Central Europe (Bulgarian) and AMC TV (Russian RKN) which appear to be owned by different groups.

Target countries

Categories of TV channels excluded from the definition include those that have the broader geographic targets

- Services available worldwide
- Pan-European (pay satellite channels)
- Europe (free satellite channel)

Linear audiovisual media services established and available in a country

Television channels that are **established in a country** include those that hold a broadcasting licence from and/or are registered with a national regulatory authority. In addition, other channels are included in the data collection that may not hold a licence or registration but can be attributed to a specific national origin by means of company address, Internet domain name etc.

Television channels that are **available in a country** comprise those that are available on the major distribution platforms (e.g. cable, DTT, IPTV, satellite). These services were identified through the channel line-ups as advertised on the websites of platform operators.

TV channels targeting other countries

The indicators used in the MAVISE database to define whether a channel is specifically targeting another national market are as follows:

- Linguistic versions in the targeted country's main language(s) (e.g. sub-titling, dubbing);
- Content of the licence (e.g. explicit mentioning of the targeted country);
- Local programming;
- Local advertising;
- Local subscription.

The data collection sample specifically excludes the following types of television services:

- TV channels that are targeting their own country of establishment (i.e. those holding a licence and/or registration from the national media regulatory authority of the country);
- Pan-European pay/free satellite channels (that are designed to appeal to the largest audience possible, including certain diaspora channels such as Mediaset Italia, MED NUCE, TRT Turk);
- TV channels that are targeting countries other than the Observatory members and EU candidate countries.

Cautionary note on the use of figures for television channels

When using the figures for linear audiovisual services, the following should be taken into account:

- HD simulcasts of SD channels are no longer considered different channels. A channel available both in SD and HD is counted only once. Similarly, a time-shifted version of a TV channel is not counted as a separate channel;
- Each linguistic version of a TV channel is counted as a separate service (regardless of whether or not a license is specific as regards the language in which the channel broadcasts);

- The total number of TV channels available in the EU is not the sum of the services available in each EU country, as the same service may be available in multiple countries;
- For the same reason, the total number of services established outside of the EU is not the difference between the total number of services established in the EU and the number of services available in the EU.

4.1.2. Pay-on-demand audiovisual media services

Definition of pay-on-demand audiovisual media services

Localised versions of pay-on-demand services

Pay-on-demand audiovisual media services are considered localised when at least two different localised versions of the service exist. Localised in this context means that a local-language user-interface of the service's website is available.

It should be noted that the statistics presented in this report do not take into account the actual language of works provided on the various pay-on-demand platforms. This type of content analysis is beyond the scope of this study.

In view of the multitude of pay-on-demand services, the study focuses on the most relevant pay-on-demand services in terms of market power using the following selection criteria:

Table 10. Criteria for selection of pay- on-demand audiovisual services

Criteria	Definition
Revenues and market shares	The service is among the leaders in terms of revenues or market share.
Key players	The service is operated by a key audiovisual player (main broadcasters, main television distributors).
Pan-European reach	The service is active in several European countries.

Sample

The total sample of pay-on-demand services includes all those established in one of the member countries of the European Audiovisual Observatory, plus those that specifically target Observatory countries but are established outside their national territories. These mainly concern US players with significant market power and other services of relevance to the market (examples below).

Service name	Type	Country of establishment
Google Play (25 localised versions)	Transactional video-on-demand	United States
Microsoft Store – Movies & TV (10 localised versions)	Transactional video-on-demand	United States
MUBI (6 localised versions)	Subscription on-demand	United States

Only pay-on-demand services are included in the sample of this study. This includes SVOD, TVOD and those offers only accessible through managed networks / a subscription to a pay-TV operator.

Services that are generally excluded from the sample and MAVISE are Snapchat, Instagram and YouTube.

This study distinguishes between four main types of services that represent different business models. Please note that the various categories of services included in the data collection are, in most cases, not geolocalised and therefore accessible worldwide. In order to have meaningful figures we consider only the services with some relevance for the considered country (mainly based on the language).

Table 11. Typology of pay-on-demand audiovisual services by business model

Typology	Definition
Transactional on-demand service	A pay service renting or selling audiovisual works on a pay-per-view basis.
Subscription on-demand service	A service offering a catalogue of on-demand services for a subscription fee.
Other pay-on-demand	Offers only accessible through managed networks / a subscription to a pay-TV operator.

Catch-up (Replay) television services are no longer tracked as separate on-demand services but treated as a feature of a TV channel. Hence, only major ‘platforms’ operated by TV groups, television distributors or third-party websites that offer paid access to the programmes of several channels in catch-up mode are now included in the data collection.

Definition of pay-on-demand audiovisual media services targeting other countries

Figures include pay-on-demand services established in the country minus the ones targeting other national markets plus those services targeting a country from abroad. The sample of pay-on-demand services targeting the EU28 also includes US-based services that are specifically targeted at the national markets of the EU Member States. These include Google Play, Microsoft Store – Movies & TV as well as MUBI.

The totality of US-based services that specifically target European markets are included in the sample of services covering all countries covered by the European Audiovisual Observatory.

Pay-on-demand audiovisual media services established and available in a country and distribution types

On-demand audiovisual media services that are established in a country include those that a national regulatory authority may hold information about. In addition, other services are included that are clearly of a specific national origin according to company address, Internet domain name, editorial responsibility stated on the services webpages etc. In most cases, however, there is no centralised information available.

Please note that the figures for services available in a country refer to those pay-on-demand services that specifically target a national market (for details see previous paragraph).

The distribution of on-demand audiovisual media services can be broken down into the following technical distribution types:

- Managed distribution means that the service is available over a network managed by an operator (mainly IPTV or cable);
- Online distribution means that the service is available 'over the top – OTT', i.e. over the open Internet (e.g. Apple's iTunes, Netflix, Google Play, Megagogo.net);
- Managed and online means that the service is available both over managed networks and online OR that the service uses a combination of both solutions.

Limitations to the identification of pay-on-demand services

Please note that identifying pay-on-demand audiovisual media services involves a series of challenges:

- Whereas pay-on-demand audiovisual media services provided through 'managed networks' can be identified through an extensive review of the TV distributors' line-ups, services available over the open Internet are not necessarily heavily advertised;
- Assessing the difference between a stand-alone pay-on-demand audiovisual media service and a catalogue included in a third-party service is not always possible. Some producers may exploit a specific 'corner' in a larger pay-on-demand service, and IPTV or cable providers may host third-party on-demand services alongside their own services. Thus, the responsibility for managing the service and billing the consumer is not always clear;
- Several pay-on-demand audiovisual media services specifically target a country other than their country of establishment. Several criteria may apply when assessing whether an on-demand service is a cross-border service: language; offices in the targeted countries; marketing material of the on-demand service.

Cautionary note on the use of figures for pay-on-demand audiovisual services

When using the figures for pay-on-demand audiovisual services, the following should be taken into account:

- Each localised version of a service is counted as a different service;
- The total number of services available in the EU is not the sum of the services available in each EU country, as the same service may be available in multiple countries;
- For the same reason, the total number of services established outside of the EU is not the difference between the total number of services established in the EU and the number of services available in the EU.

A publication
of the European Audiovisual Observatory

European
Audiovisual
Observatory

COUNCIL OF EUROPE

CONSEIL DE L'EUROPE