

Audiovisual media services in Europe

Supply figures and AVMSD jurisdiction claims - 2020

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June 2021

A publication of the European Audiovisual Observatory



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I. INTRODUCTION AND METHODOLOGY

I. INTRODUCTION AND METHODOLOGY

Based on the analyses of 2020 figures from the Observatory's MAVISE database, this publication offers insights from two perspectives.

The first focuses on **the supply of audiovisual media (AV) services in Europe**, presenting figures for television, on-demand services and video-sharing platforms available in and originating from the European market. It also includes information on AV services aimed at non-domestic markets.

The second perspective looks at which countries and which legislation cover these services, in other words **the jurisdiction claims made under the revised European Audiovisual Media Services Directive (AVMSD)**, including the criteria on which these claims are based.

- For more information about the MAVISE database and the data used, please visit <http://mavise.obs.coe.int/>
- The data available in MAVISE are based on the contributions of the audiovisual regulatory authorities of the 27 EU Member States as well as 14 other European countries and Morocco.
- MAVISE territories cover the EU27, Albania, Armenia, Bosnia and Herzegovina, Georgia, Iceland, Liechtenstein, Montenegro, North Macedonia, Norway, the Republic of Serbia, the Russian Federation, Switzerland, Turkey, the United Kingdom and Morocco
- References to Europe* include the 41 European territories covered by MAVISE and Morocco
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I. INTRODUCTION AND METHODOLOGY

II. SUPPLY FIGURES

a) Audiovisual media services available in Europe

- Figures for AV services available in Europe are based on MAVISE data comprising a) all AV services and video-sharing platforms included in the registries of the audiovisual regulatory authorities in the 42 countries covered by the MAVISE database and b) other AV services relevant from a market perspective, including those from outside serving European markets (e.g. from the US etc.).
- References to VOD include both on-demand services and video-sharing platforms.

b) Audiovisual media services originating from Europe

- Figures for AV services originating from Europe comprise those based in the territories covered by the MAVISE database, including the ones registered with the audiovisual regulatory authorities.

c) Audiovisual media services aimed at non-domestic markets

- AV services aimed at non-domestic markets are those that do not primarily serve the domestic market. Typical examples are the various linguistic versions of branded channels. Figures are based on AV services and video-sharing platforms originating from the MAVISE territories.

III. AVMSD JURISDICTION CLAIMS

- The AVMSD refers to the Audiovisual Media Services Directive (EU) 2018/1808.
- Data include claims over linear and non-linear AV services (TV and on-demand) and video-sharing platforms made under AVMSD jurisdiction in the 30 members of the European Economic Area (EEA).
- For more information on AVMSD jurisdiction criteria please see *The AVMSD Jurisdiction Criteria concerning Audiovisual Media Service Providers after the 2018 Reform*, Institute of European Media Law (EMR), Saarbrücken, December 2018, <https://emr-sb.de/study-avmsd-jurisdiction-criteria/>

II. SUPPLY FIGURES

a) Audiovisual media services available in Europe

II. SUPPLY FIGURES – Audiovisual media services available in Europe



How many audiovisual media services are available in Europe?

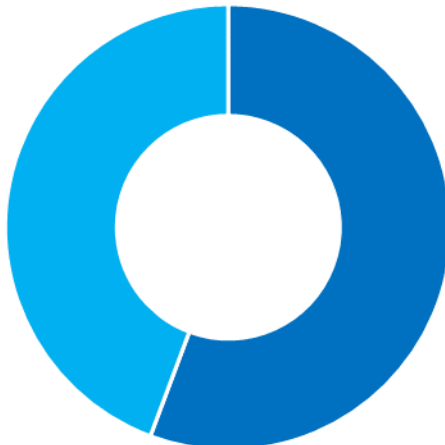


10 839 TV channels and 2 799 on-demand services totalling 13 638 audiovisual media services (end 2020)

Breakdown by type of audiovisual media service available in Europe* | 2020 - In number of services and %



Local TV
4803
44%



TV
6036
56%



Free on-demand
1620
58%



Pay on-demand
1179
42%

II. SUPPLY FIGURES – Audiovisual media services available in Europe

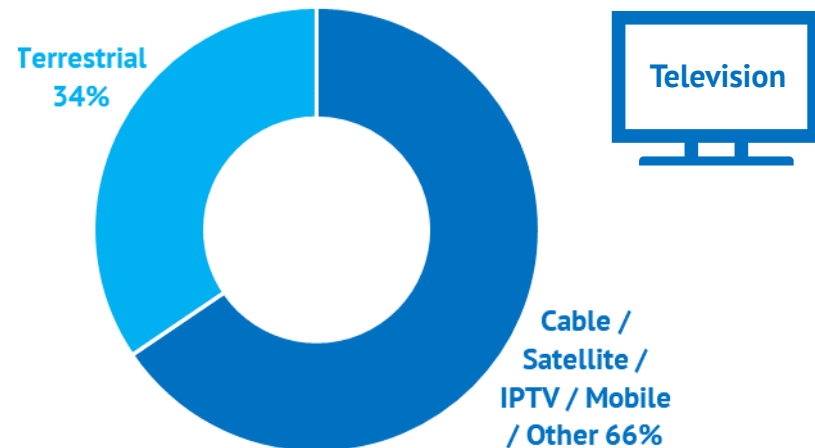


How can television channels available in Europe be accessed?



More than half of TV channels, including local TV, are freely available and one in three is accessible via terrestrial television (end 2020)

Breakdown of TV channels available in Europe* by type of access and transmission | 2020 - In %



II. SUPPLY FIGURES – Audiovisual media services available in Europe

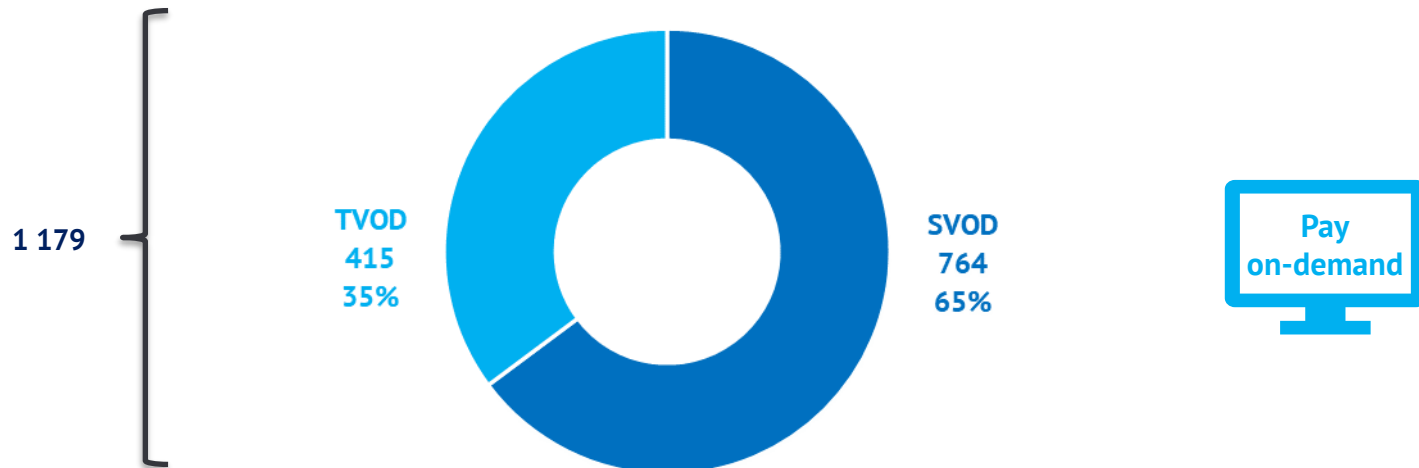


How many pay on-demand services available in Europe are subscription-based?



Two out of three pay on-demand services are SVOD (end 2020)

Breakdown of pay on-demand services available in Europe* by business model | 2020 – In number of services and %



II. SUPPLY FIGURES

b) Audiovisual media services originating from Europe

II. SUPPLY FIGURES – Audiovisual media services originating from Europe

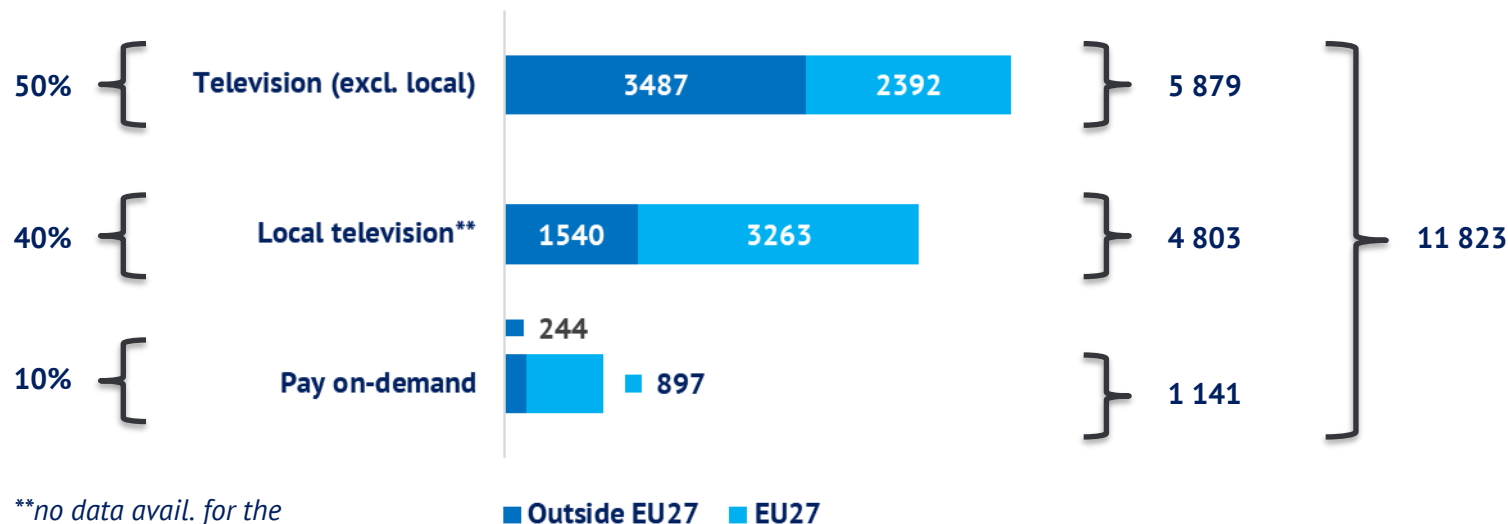


What is the number of audiovisual media services originating from Europe?



There are 5 879 TV channels, 4 803 local TV channels and 1 141 pay on-demand services coming from Europe (end 2020)

Breakdown of audiovisual media services originating from Europe* by type of service | 2020 - In number of services and %



**no data avail. for the Russian Federation

II. SUPPLY FIGURES – Audiovisual media services originating from Europe

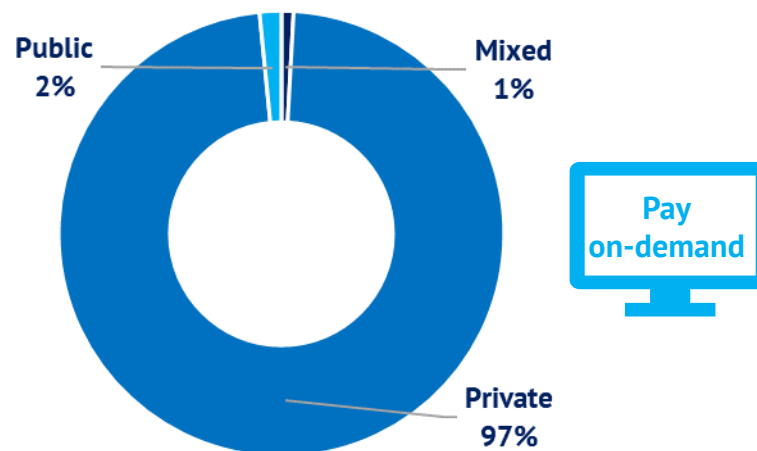
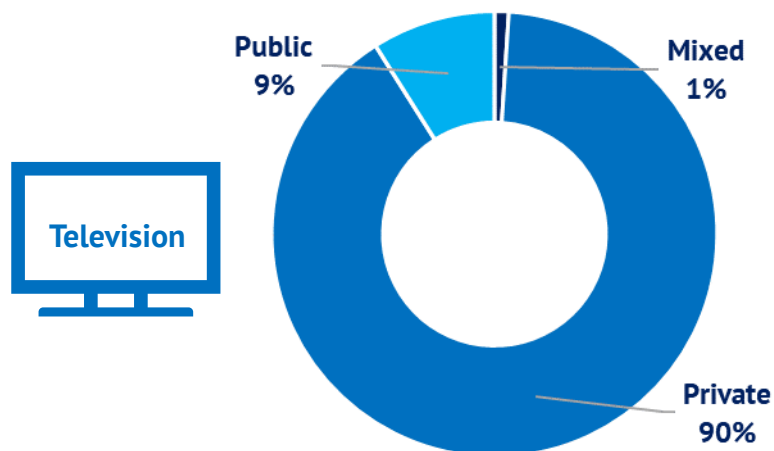


How many audiovisual media services in Europe are publicly owned?



One in ten television channels (excl. local) and 3% of pay on-demand services are publicly owned or have a mixed ownership (end 2020)

Breakdown of audiovisual media services originating from Europe* by statute | 2020 - In %



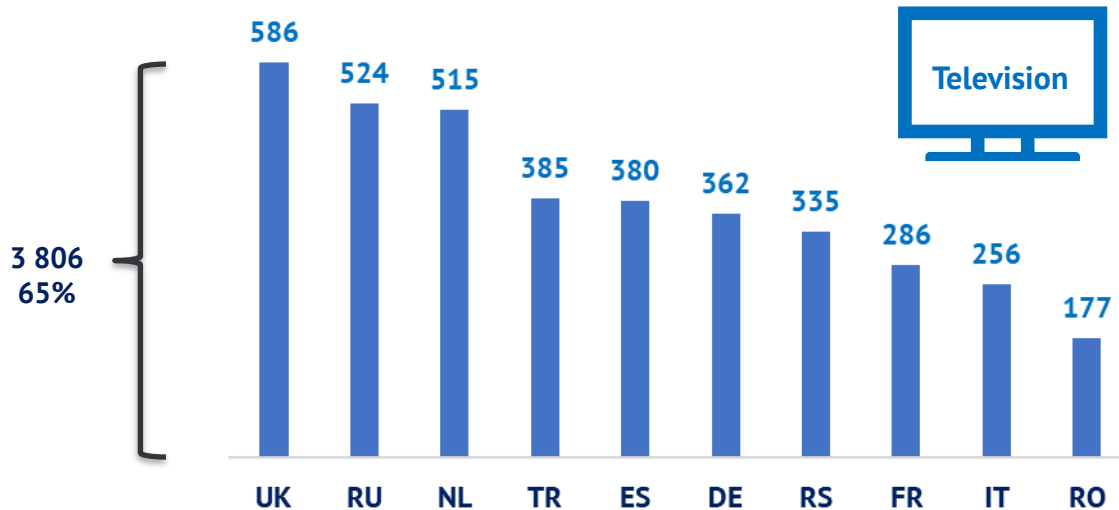
II. SUPPLY FIGURES – Audiovisual media services originating from Europe



Who are the leading suppliers of television channels (excl. local) in Europe?



Top 10 ranking of countries by supply of television channels in Europe* | 2020 - In numbers of services



II. SUPPLY FIGURES – Audiovisual media services originating from Europe



Apart from the top 10, how many countries provide at least 50 television channels?



17 European countries have between 50 and 165 TV channels (excl. local) coming from their territories (end 2020)

Countries with 50 to 165 television channels originating from their territories | 2020 - In numbers of services



II. SUPPLY FIGURES – Audiovisual media services originating from Europe

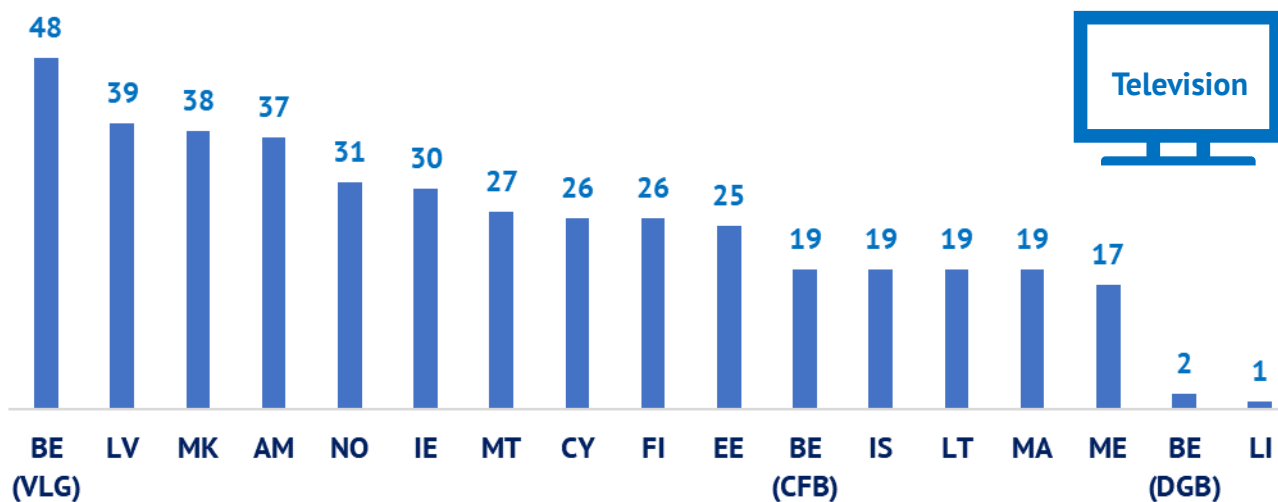


How many television channels are originating from the territories of the remaining countries?



The supply of TV channels (excl. local) in the 17 other countries ranges between one and 48 TV channels (end 2020)

Countries with 1 to 48 television channels originating from their territories | 2020 - In numbers of services



II. SUPPLY FIGURES – Audiovisual media services originating from Europe

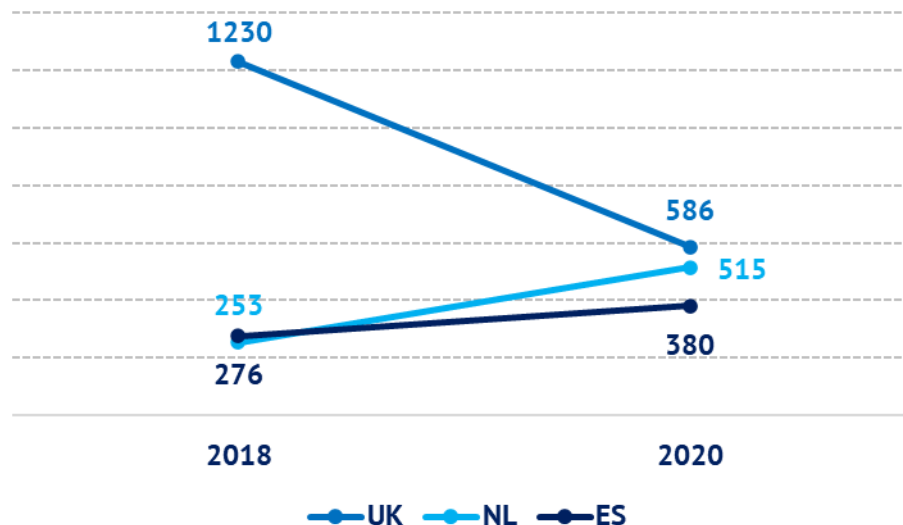


How much did the European share of television channels originating from the UK change after Brexit and what were the developments in the Netherlands and Spain (2018-2020)?



The number of UK-based TV channels dropped by -50%
TV channels originating from the Netherlands more than doubled (+104%)
TV channels coming from Spain increased by +38%
A third of TV channels leaving the UK migrated to the Netherlands (18%) and Spain (14%)

TV channels originating from the UK, NL and ES before and after Brexit | 2018-2020 - In number of services



Brexit



II. SUPPLY FIGURES – Audiovisual media services originating from Europe



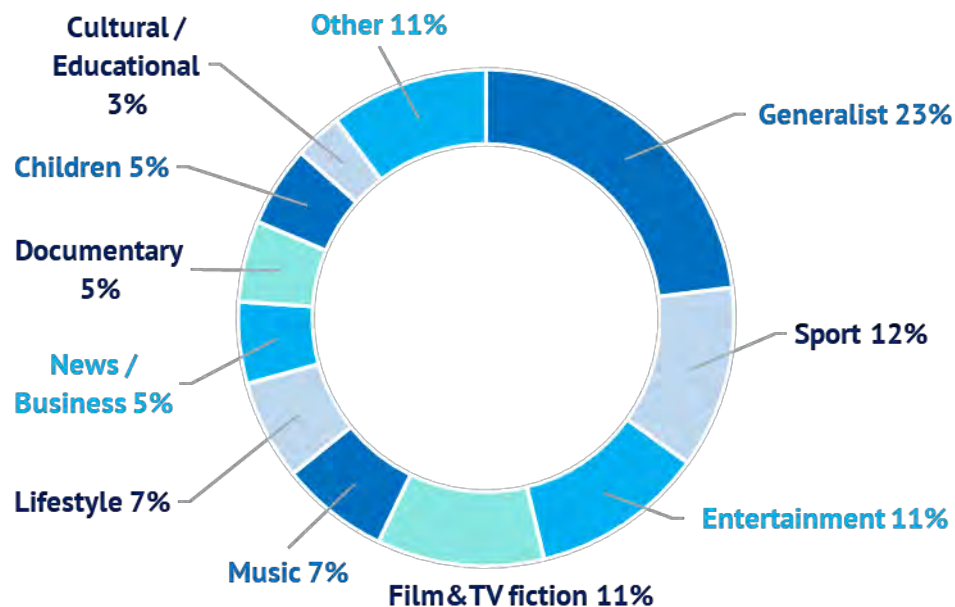
What are the most popular genres among television channels in Europe?



The top four genres for TV channels (excl. local) are Generalist, Sport, Entertainment and Film&TV fiction (end 2020)

} 57%

Breakdown of television channels originating from Europe* by genre | 2020 - In %



II. SUPPLY FIGURES – Audiovisual media services originating from Europe



What are the main countries supplying pay on-demand services in Europe?



Ireland

1



France

2



United Kingdom

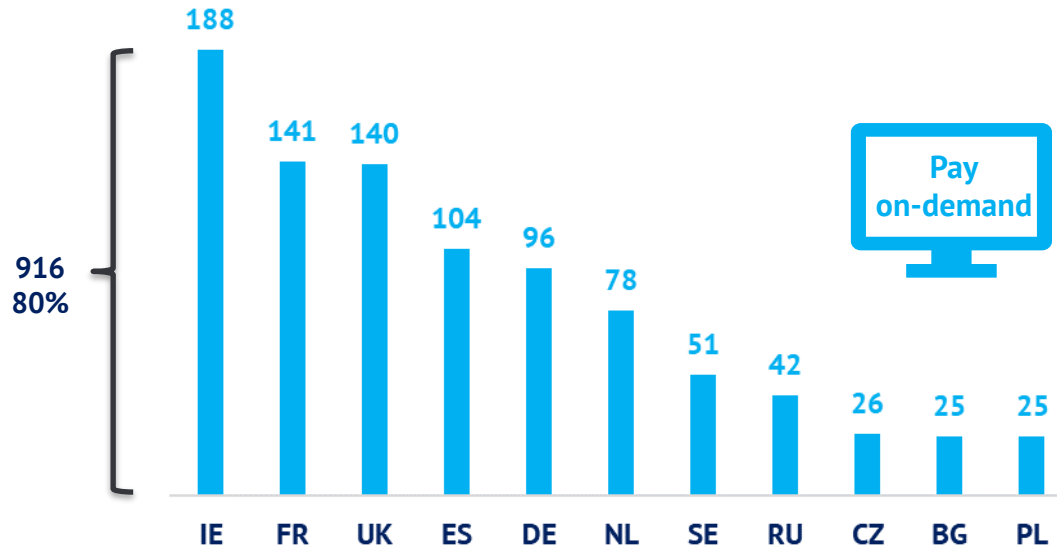
3



(end 2020)

41%

Ranking of 11 leading countries by supply of pay on-demand services in Europe* | 2020 - In numbers of services



SUPPLY – Pay on-demand originating from Europe

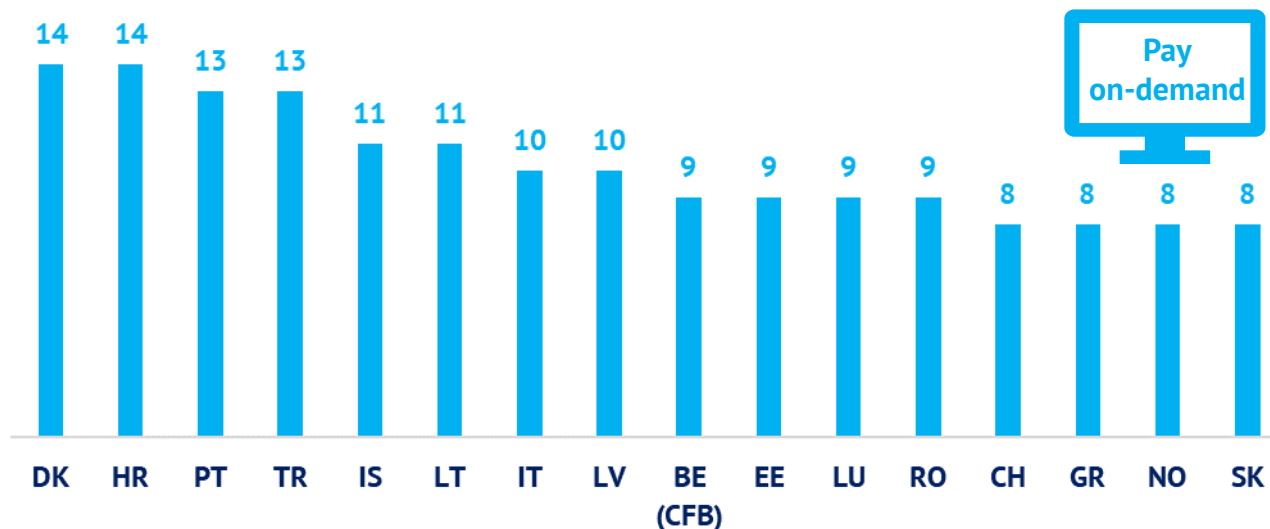


Other than the top 11, how many countries provide at least 8 pay on-demand services?



16 European countries have between eight and 14 pay on-demand services coming from their territories (end 2020)

Countries with 8 to 14 pay on-demand services originating from their territories | 2020 - In numbers of services



II. SUPPLY FIGURES – Audiovisual media services originating from Europe



How many pay on-demand services are originating from the territories of the remaining countries?



The supply of pay on-demand in the 15 other countries ranges between one to seven services (end 2020)

Countries with 1 to 7 pay on-demand services originating from their territories | 2020 - In numbers of services



II. SUPPLY FIGURES – Audiovisual media services originating from Europe



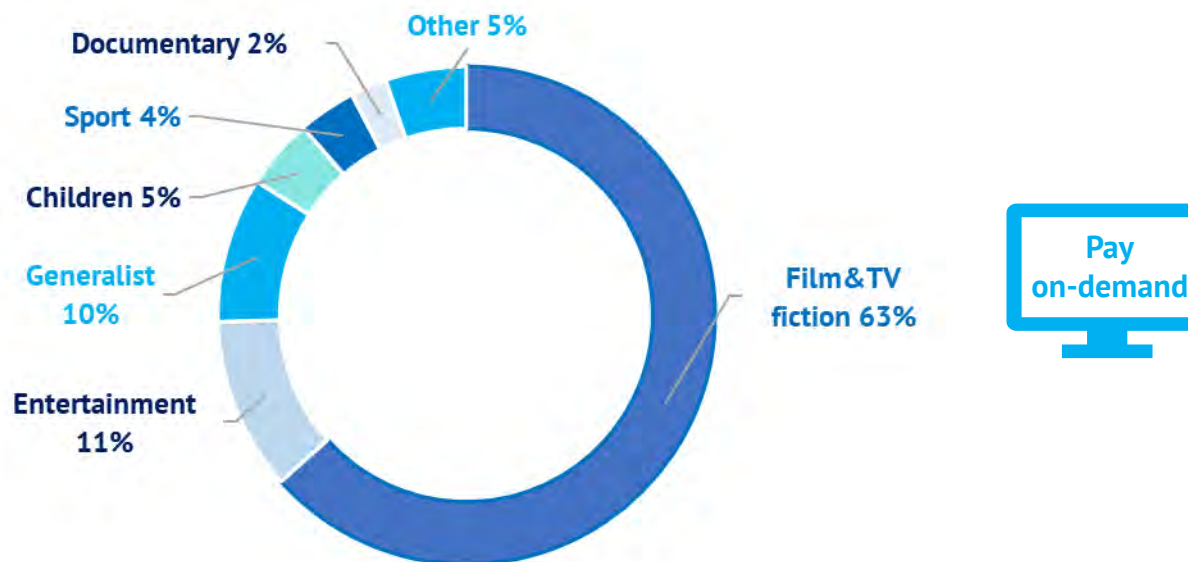
What are the top genres among pay on-demand services in Europe?



The top three genres for pay on-demand services are Film&TV fiction, Entertainment and Generalist (end 2020)

} 84%

Breakdown of pay on-demand services originating from Europe* by genre | 2020 - In %



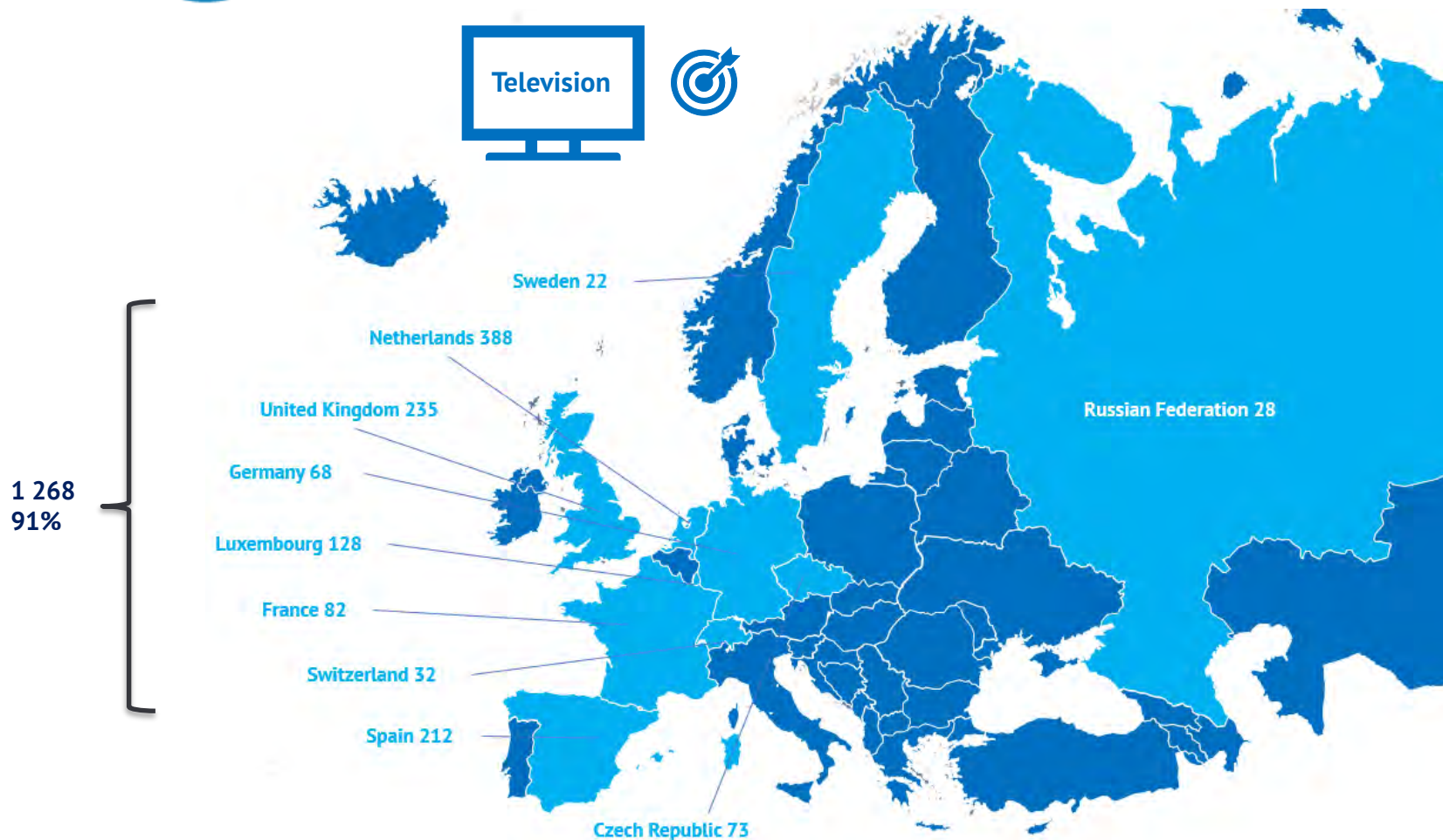
II. SUPPLY FIGURES

c) Audiovisual media services aimed at non-domestic markets

II. SUPPLY FIGURES – AV services aimed at non-domestic markets (end 2020)



What are the top 10 hubs for television channels aimed at non-domestic markets?



II. SUPPLY FIGURES – AV services aimed at non-domestic markets



What is the share of the three leading hubs among television channels aimed at non-domestic markets?



Netherlands

1



United Kingdom

2



Spain

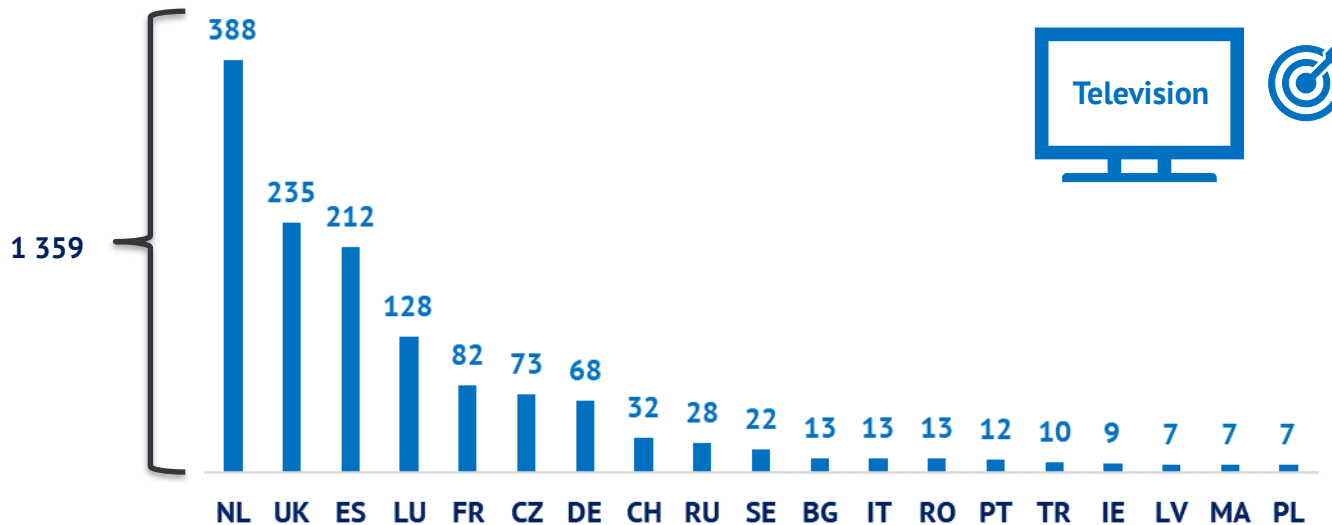
3



(end 2020)

60%

Countries with 8 to 388 TV services aimed at non-domestic markets | 2020 - In numbers of services



II. SUPPLY FIGURES – AV services aimed at non-domestic markets

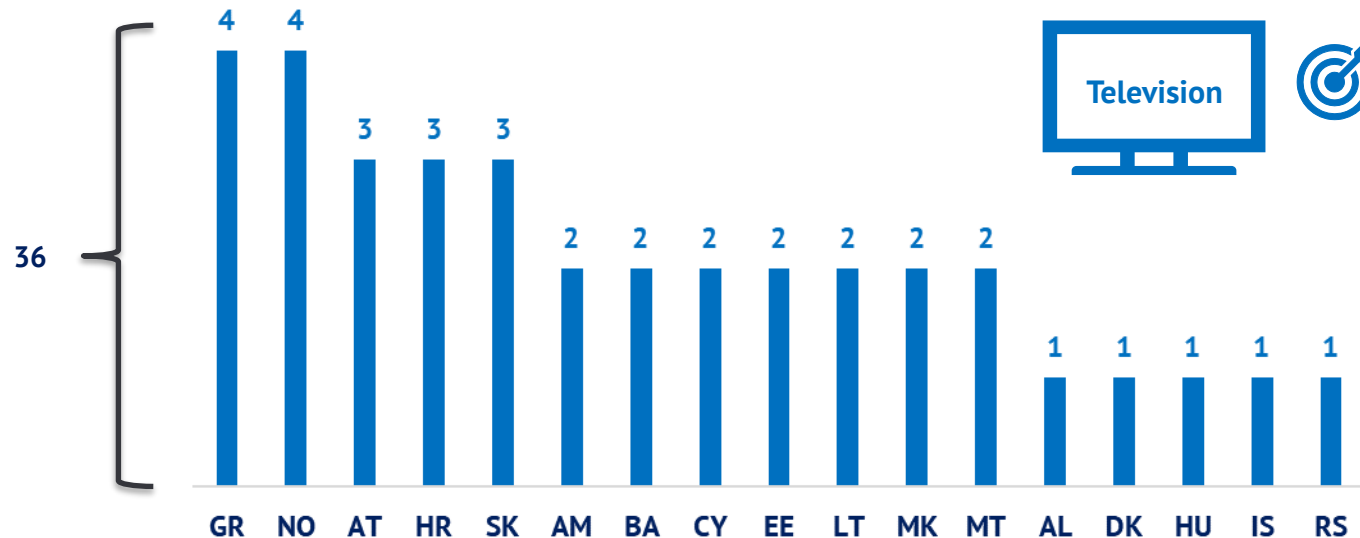


What is the European share of television channels and pay on-demand services aimed at non-domestic markets?



A quarter (24%) of all TV channels and more than half (53%) of all pay on-demand services coming from Europe are aimed at non-domestic markets (end 2020)

Countries with 1 to 4 TV services aimed at non-domestic markets | 2020 – In number of services



II. SUPPLY FIGURES – AV services aimed at non-domestic markets

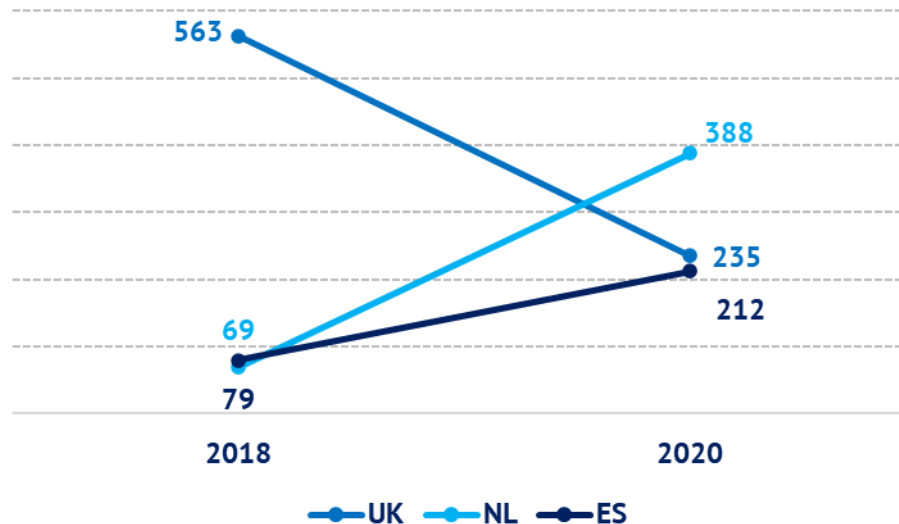


How much did the European share of television channels aimed at non-domestic markets originating from the UK change after Brexit and what was the development in the Netherlands and Spain (2018-2020)?



The number of UK-based TV channels more than halved (-58%)
TV channels from the Netherlands rose more than five times (+462%)
TV channels coming from Spain more than doubled (+168%)

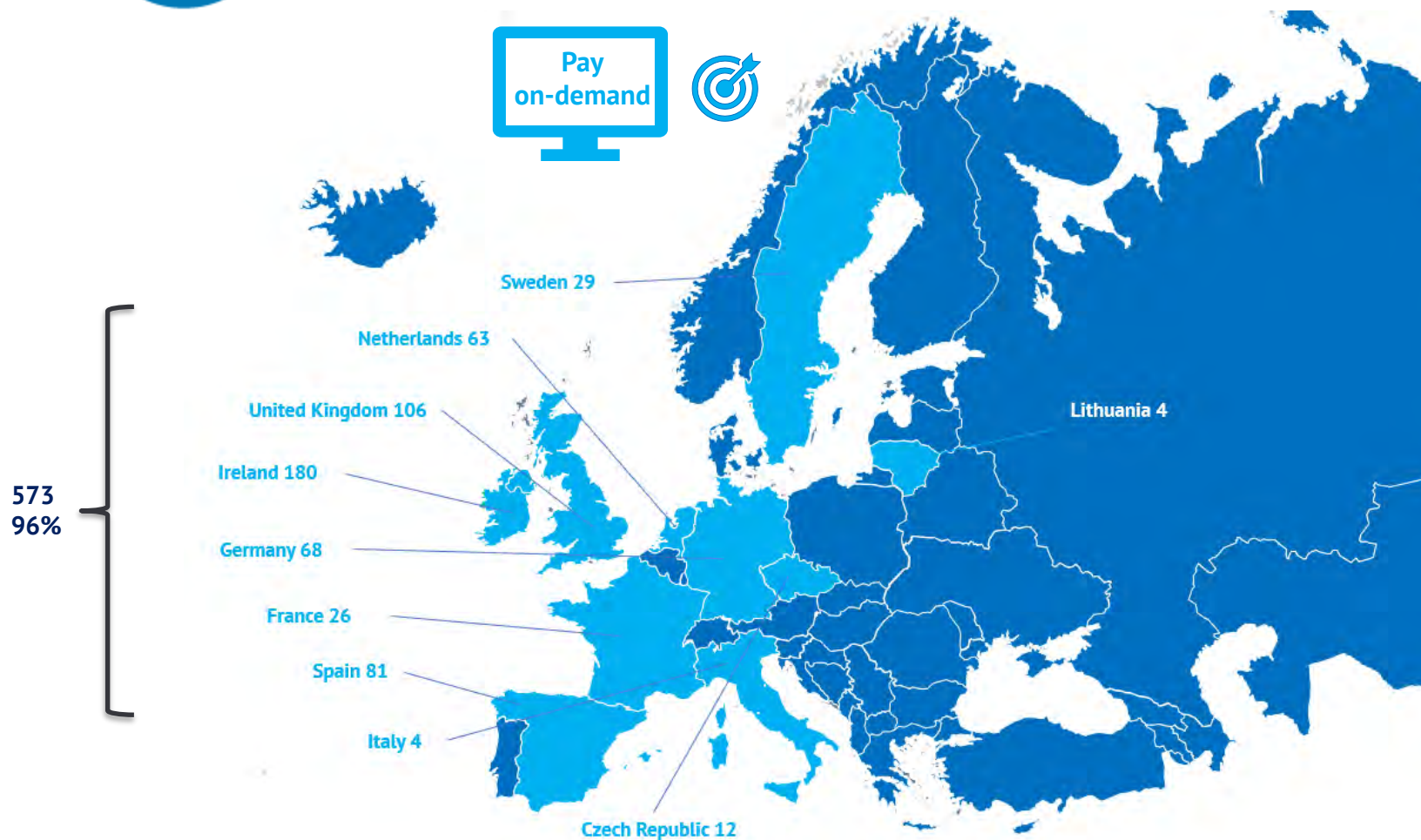
TV channels aimed at non-domestic markets before and after Brexit | 2018-2020 - In number of services



II. SUPPLY FIGURES – AV services aimed at non-domestic markets (end 2020)



What are the top 10 hubs for pay on-demand services aimed at non-domestic markets?



II. SUPPLY FIGURES – AV services aimed at non-domestic markets



What is the share of the three main hubs among pay on-demand services aimed at non-domestic markets?



Ireland

1



United Kingdom

2



Spain

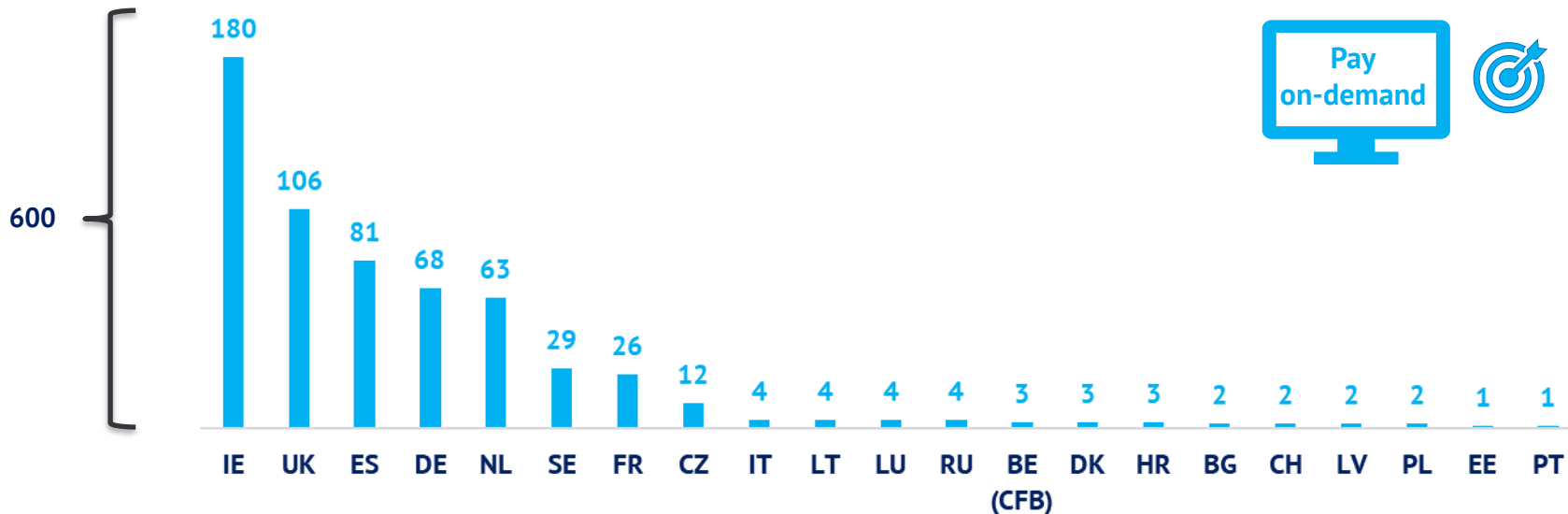
3



(end 2020)

61%

Countries with pay on-demand services aimed at non-domestic markets | 2020 – In number of services



III. AVMSD JURISDICTION CLAIMS

a) Audiovisual media services claimed under AVMSD jurisdiction

II. AVMSD JURISDICTION CLAIMS



What is covered by Articles 2 and 28a of the AVMSD?

Article 2 details the criteria to define jurisdiction over providers of audiovisual media services and Article 28a over providers of video-sharing platforms



Elements establishing jurisdiction according to Articles 2 and 28a AVMSD (EU) 2018/1808

	AVMSD jurisdiction criteria	Elements
TV and VOD inside EU	Article 2 (3) lit. a)	Head office and editorial decisions in one Member State
	Article 2 (3) lit. b)	Head office and editorial decisions in more than one Member State; location of the significant part of the workforce is decisive
	Article 2 (3) lit. c)	Involvement of a third country
TV and VOD outside EU	Article 2 (4) lit. a)	“satellite up-link” used on the territory of a Member State by non-EU provider
	Article 2 (4) lit. b)	“satellite capacity” appertaining to a Member State
VSP	Article 28a	Provisions applicable to video-sharing platform services

II. AVMSD JURISDICTION CLAIMS



What is the most common AVMSD criteria applicable for jurisdiction claims over providers of audiovisual media services and video-sharing platforms?



The highest number of jurisdiction claims were made under AVMSD Article 2 (3) lit. a) with a total of 8 755 claims (end 2020)

Breakdown of jurisdiction claims by AVMSD jurisdiction criteria in the EEA30 | 2020 - In number of jurisdiction claims

AVMSD jurisdiction criteria	Number of claims
Article 2 (3) lit. a)	8 755
Article 2 (3) lit. b)	2
Article 2 (3) lit. c)	15
Article 2 (4) lit. a)	16
Article 2 (4) lit. b)	155
Article 28a (1-7)	3
Total	8 946



II. AVMSD JURISDICTION CLAIMS

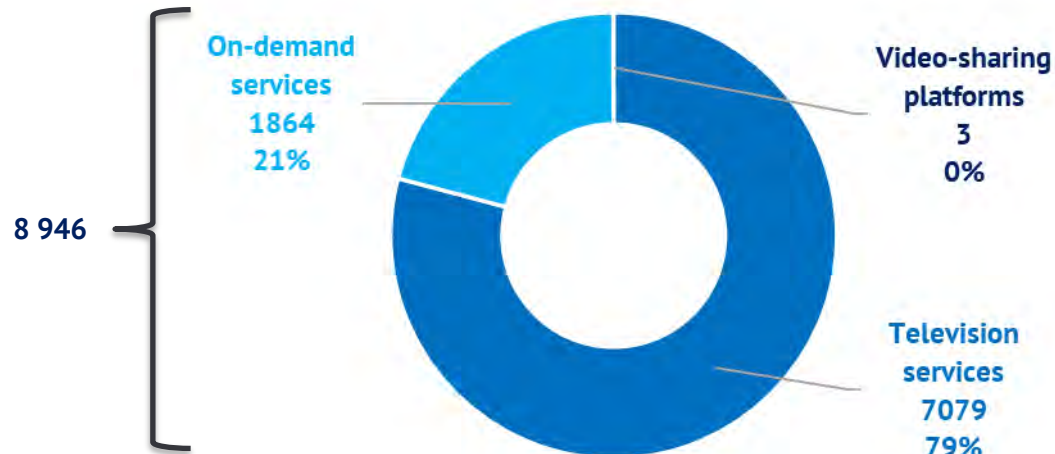


How many providers of audiovisual media services and video-sharing platforms under AVMSD jurisdiction are claimed by members of the EEA?



Claims for 7 079 television services, 1 864 on-demand services and three video-sharing platforms are made under AVMSD jurisdiction by the EEA members (end 2020)

Breakdown of AVMSD jurisdiction claims by type of service in the EEA30 | 2020 - In number of jurisdiction claims



II. AVMSD JURISDICTION CLAIMS



What are the countries with the highest number of AVMSD jurisdiction claims?



Italy

1



Netherlands

2



Spain

3

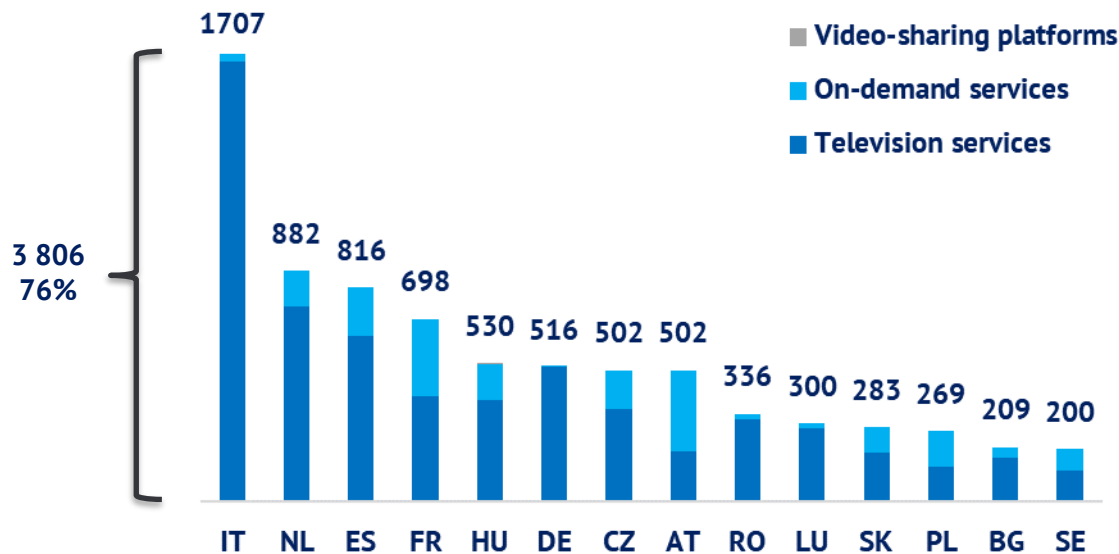


(end 2020)



38%

EEA members claiming at least 200 providers under AVMSD jurisdiction | 2020 – In number of jurisdiction claims



II. AVMSD JURISDICTION CLAIMS

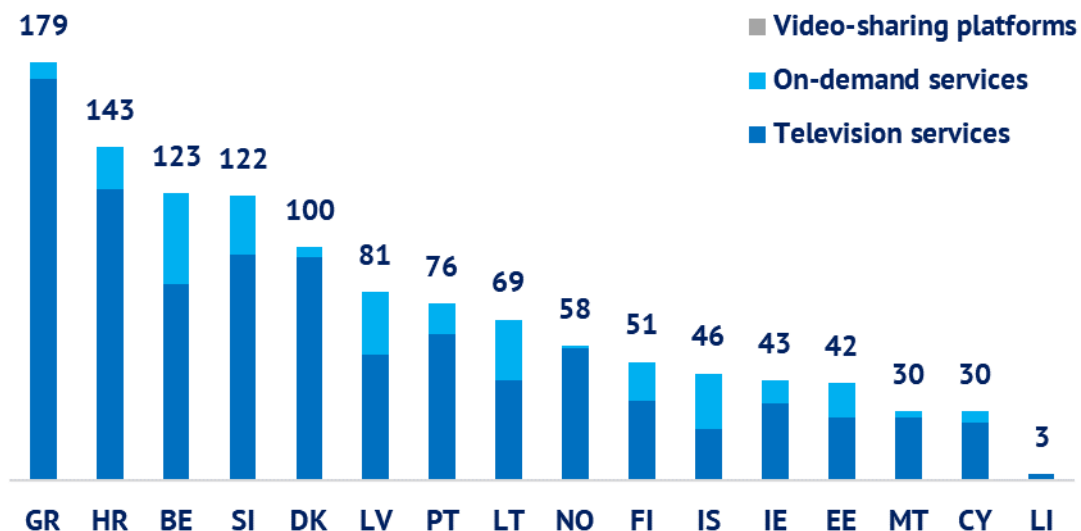


How many providers of audiovisual media services and video-sharing platforms are claimed under AVMSD jurisdiction by the other EEA members?



The number of providers claimed under AVMSD jurisdiction in the remaining EEA members ranges between three and 179 (end 2020)

EEA members claiming up to 179 providers under AVMSD jurisdiction | 2020 – In number of jurisdiction claims



More information:

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