Audiovisual media services in Europe - 2022 edition

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January 2023

A publication of the European Audiovisual Observatory

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European Audiovisual Observatory

Introduction

Based on the analyses of May 2022 figures from the European Audiovisual Observatory's MAVISE database, this publication offers insights into the European audiovisual sector from two perspectives.

The first focuses on **the supply of audiovisual media 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 primarily serving non-domestic markets.

The second perspective looks **at the main players operating in Europe** with a specific focus on the top 50 and top 10 TV groups and those for on-demand services. Particular attention is paid to the weight of US players in the European audiovisual sector.

- For more information about the MAVISE database and the data used, please visit http://mavise.obs.coe.int/
- The data available in this report are based on the contributions of the audiovisual regulatory authorities of the following countries: the EU27, Albania, Armenia, Bosnia and Herzegovina, Georgia, Iceland, Liechtenstein, Montenegro, North Macedonia, the Republic of Moldova, Norway, Serbia, Switzerland, Türkiye, the United Kingdom and Ukraine.
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Scope and methodology

a) Audiovisual media services available in Europe

- Figures for AV services available in Europe are based on MAVISE data comprising a) all AV linear and on-linear 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 Europe but serving European markets (e.g. from the US etc.).
- References to VOD include on-demand services and video-sharing platforms.

b) Audiovisual media services serving domestic markets

- AV services where the country of establishment and operational scope of a service provider are identical.

c) Audiovisual media services primarily 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.

d) Terrestrial television services

- In case of multiple types of registrations for the exact same service, MAVISE always keeps the DTT registration information if available. This includes a) TV services with a DTT registration b) any other TV services on national DTT networks and c) TV services originating from an AVMSD country and registered there for cable/satellite services which are received in another AVMSD country where the service has a DTT license.

e) Type of player

- A pan-European player is a group which operates services in several markets with a diverse geographical scope.
- A regional player is a group which operates services within a limited geographical scope of countries.
- A national player is a group which operates most of its services in the domestic market.

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Executive summary – I. The big picture

- The European audiovisual media services sector has been mostly shaped by the development of its unique national media ecosystems. This diversity is reflected by an industry boasting a total of 12 275 audiovisual media services which are available in wider Europe (May 2022).

- Around three quarters of these are linear services (9 080 TV channels) and one quarter are non-linear services (3 195 VOD services including AVOD, catch-up TV and video-sharing platforms). A substantial part of on-demand services are SVOD (29%) and TVOD (15%) and 38% of TV channels in Europe are local TV services.

- The content of AV services in Europe reveals significant differences between linear and non-linear services. While TV programming is largely defined by thematic fragmentation, on-demand services have a clear focus on film and TV fiction content. The greater part of the TV offering caters to special interests in the form of thematic channels (76%) whilst around one quarter of TV channels provide generalist programming. In contrast, over a third of all on-demand services in Europe offer film and TV fiction programming (36%). At the same time more and more thematic streamers are taking a foothold in the market.

- With regards to ownership, the European TV market is divided into a public sector with mainly generalist programming available on DTT networks and a private sector which has expanded into thematic cable and satellite channels. Almost all on-demand services are privately owned (97%). Public service media have entered the market as well, mostly offering catch-up of their linear programming. One in five public on-demand services are pay services, for example the international version of the BBC iPlayer.

- TV and on-demand services targeting Europe from outside make up just 2%. Conversely, there are very few exports out of Europe. Typically, most audiovisual services in Europe serve domestic markets, meaning that the country of establishment and operational scope of a service provider are identical.

- Meanwhile, the European AV sector is characterised in part by a certain degree of pan-European supply movements. This market fluidity manifests itself in the fact that around 15% of all linear services available in Europe primarily serve non-domestic markets and 21% of pay-on-demand services.

- The programming content of non-domestic TV channels and on-demand services is almost entirely thematic. The main establishment hubs for non-domestic TV channels are the Netherlands, Spain and Luxembourg. For on-demand services they are Ireland, the UK and the Netherlands. Most non-domestic TV channels and almost all non-domestic on-demand services are in private ownership.

- Fewer in numbers but omnipresent, around 6% of all linear services available in Europe are pay or free pan-European satellite channels. Public service media are well represented among free pan-European TV channels. While most free satellite channels are news and generalist channels, pan-European satellite channels for pay tend to be services with adult and entertainment content.

- Overall, US groups play a prominent role in the European AV sector. Around one in five (19%) of all TV channels (excluding local TV) are US-owned and over one third (36%) of all SVOD and TVOD services in Europe belong to a US company.

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Executive summary – II. Main players

- Non-European players have taken a strong foothold in the European AV market. One in four of the top 50 TV groups and more than a third of the top 50 groups for on-demand services have a non-European parent company. The majority of the top 50 players, ranked by number of services, operate outside their domestic markets. This is the case for two thirds of the top 50 TV groups and four out of five of the top on-demand service groups in Europe.

- US players represent most non-European parent companies. One in five of the top 50 TV groups in Europe and one in four of the top 50 on-demand service groups has a US parent company.

- Among the top 10 AV groups operating in Europe, the weight of US players is even more pronounced. Half of the top 10 TV groups and eight out of the top 10 groups for on-demand services are of US origin. Their TV channel and on-demand service portfolios are many times bigger than those of their European competitors in the top 10 ranking.

- US players all operate fully on the pan-European level, serving numerous European markets. The Walt Disney Company, for example, has a virtual European omnipresence, operating in 45 European TV markets.

- With regards to their establishment hubs, pan-European players employ different strategies. Netflix, for example, uses a centralised strategy with a single country of establishment from where it targets the European markets. A core hubs strategy is used by the BBC, where typically a small number of countries serve as a basis to target various national markets. A decentralised strategy is applied by AT&T where a larger number of establishment hubs serve the European markets.

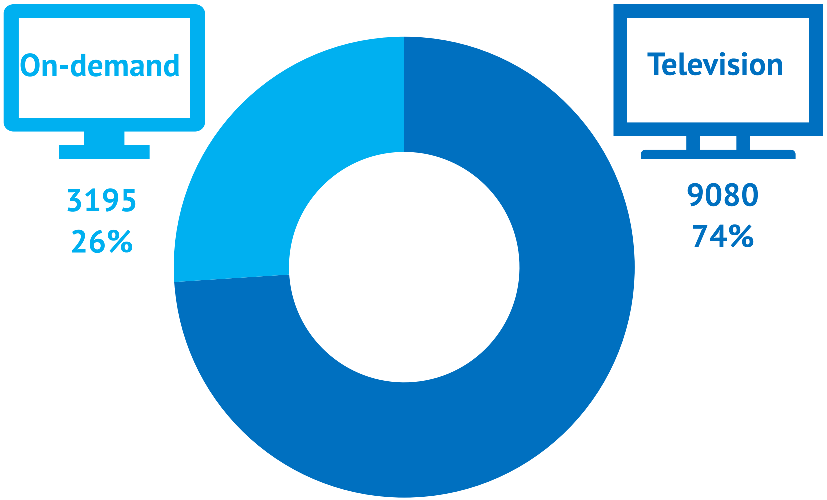
Part I. The big picture – AV services

The big picture – AV services

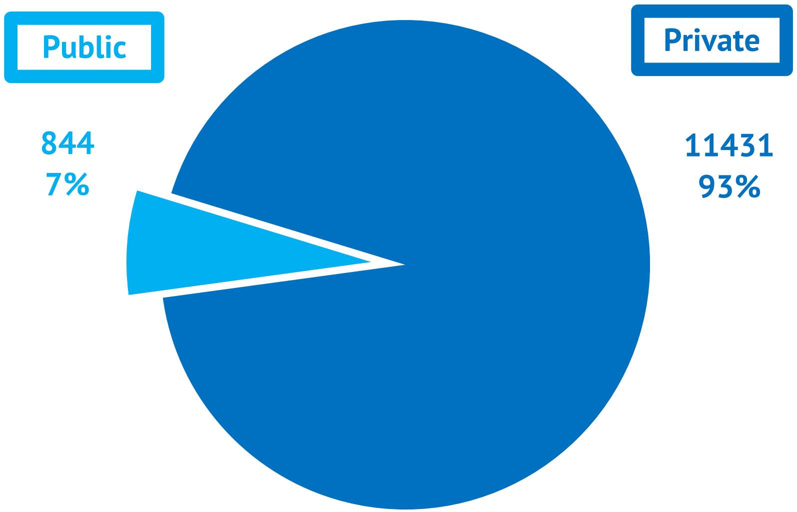
Overall, there are 12 275 audiovisual media services available in wider Europe (May 2022).

- One in four audiovisual media services in Europe is an on-demand service.
- Most AV services are in private hands and 7% are in public ownership.

Type of audiovisual media service available in Europe | May 2022 - In number of services and %



Ownership of audiovisual media service available in Europe | May 2022 - In number of services and %



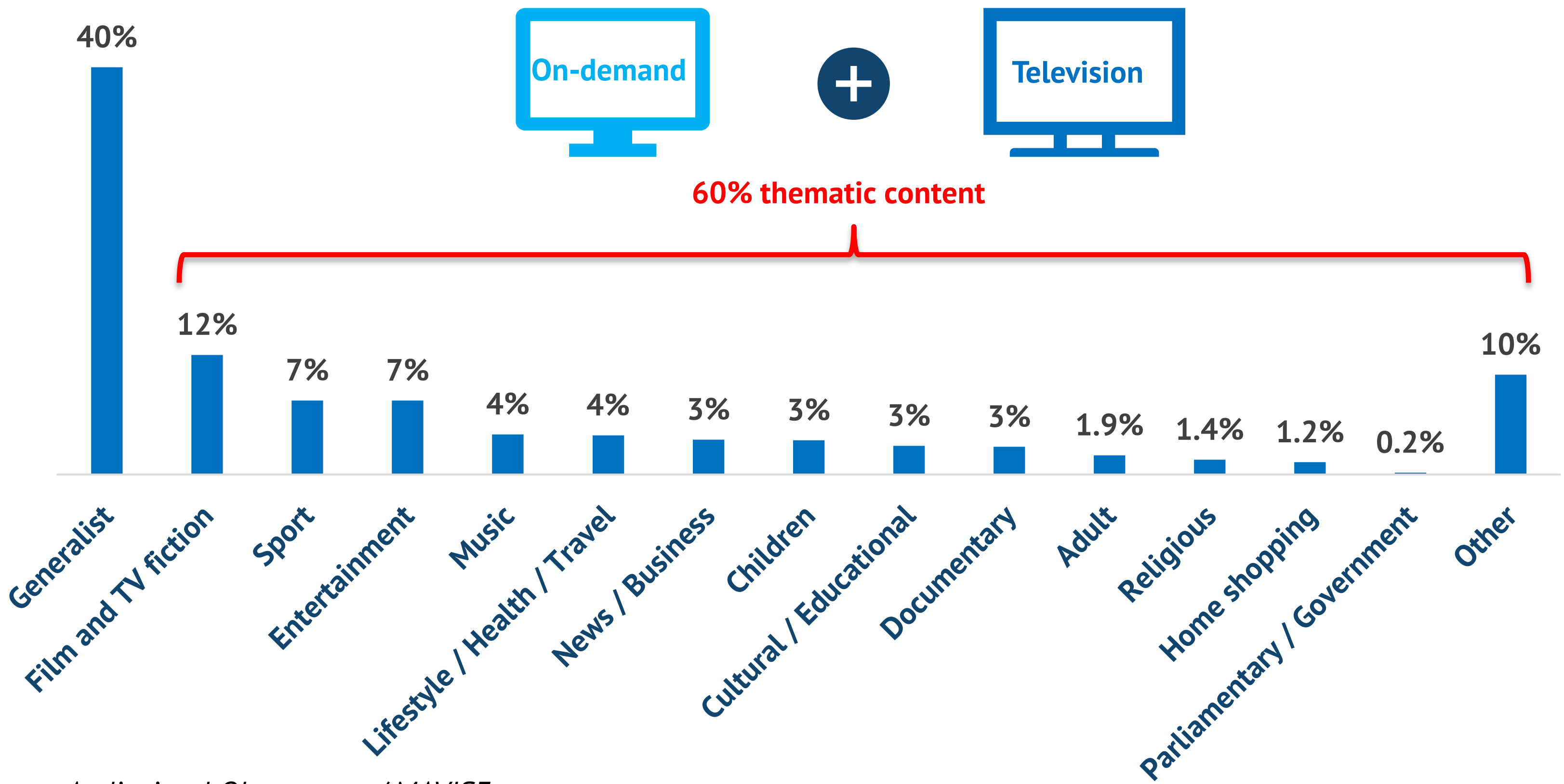
Source: European Audiovisual Observatory / MAVISE

The big picture – AV services content

More than half of AV service programming has a thematic focus.

- 60% of AV services in Europe offer thematic programming.
- Among the most popular programming types are film and TV fiction, sport and entertainment.

Programming of audiovisual media services available in Europe | May 2022 - In %



Source: European Audiovisual Observatory / MAVISE

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The big picture – TV channels

The big picture – TV channels in Europe

Most TV channels in Europe serve domestic markets (85%).

- **TV services targeting Europe from outside make up just 2%.**
- **Conversely, there are very few exports out of Europe (e.g. a small number of BBC Earth channels).**

9 080 TV channels in Europe

Inflows* 2%

Domestic TV 85%
Non-domestic TV 9%
Pan-European TV 6%

Outflows 0.1%**

Local TV 38%

* *Targeting Europe from outside.*
** *Exports outside Europe.*

Source: European Audiovisual Observatory / MAVISE / May 2022

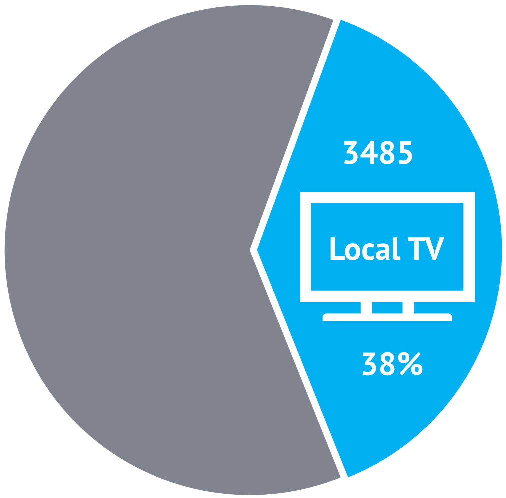
European Audiovisual Observatory

The big picture – Local TV channels

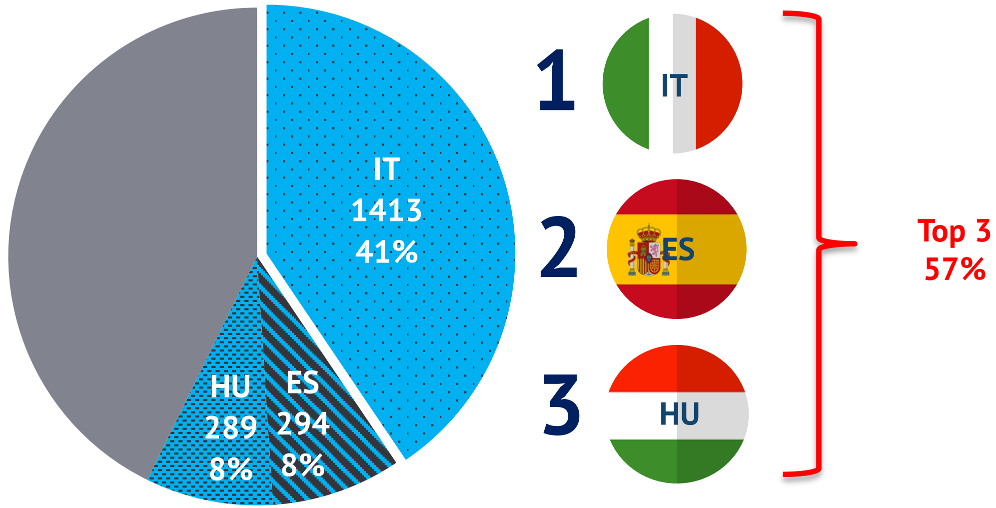
The European television sector is characterised by a significant share of local TV services.

- Local TV makes up 38% of the overall number of TV channels in Europe.
- Three countries account for more than half of all local TV channels.
- Around 85% of the Italian AV market is local channels - the equivalent of 41% of all local channels in Europe.

Share of local TV channels available in Europe | May 2022 - In number of services and %



Breakdown of local TV by country | May 2022 - In number of services and %



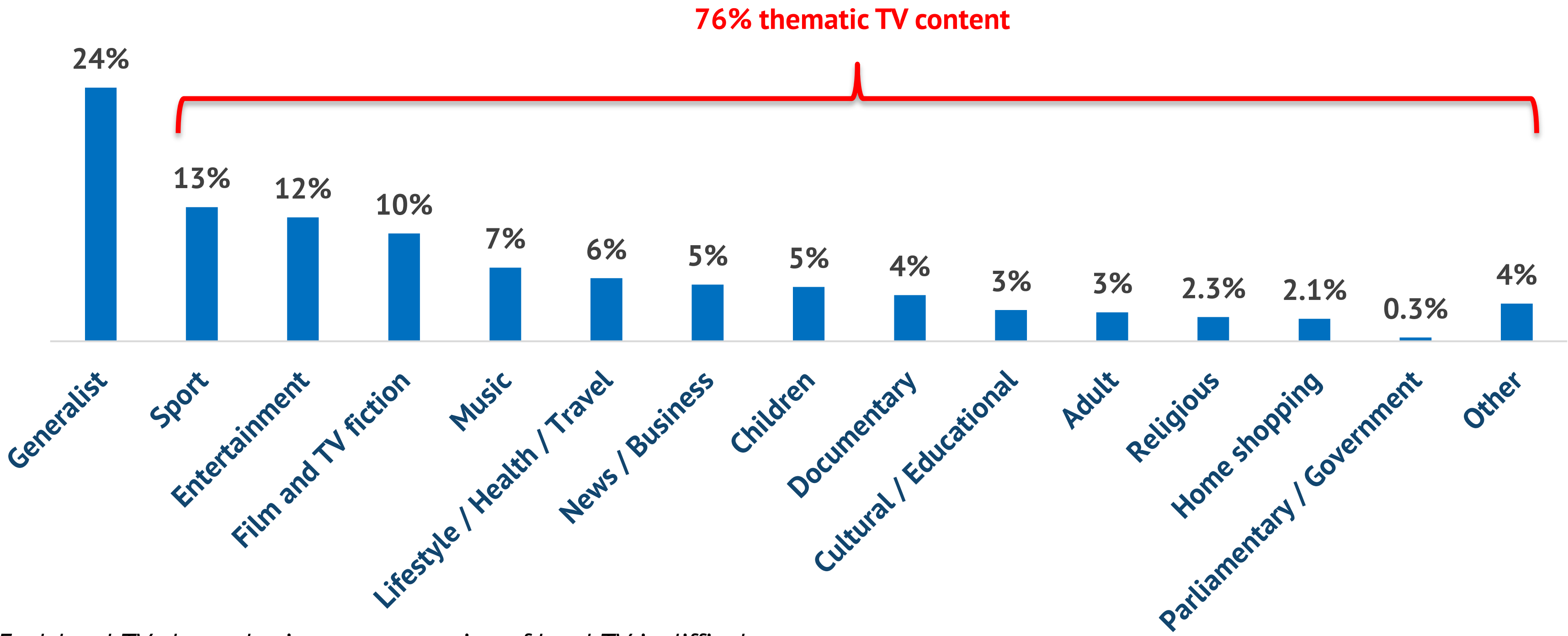
Flag icons © Copyright Showeet.com
Source: European Audiovisual Observatory / MAVISE

The big picture – TV channel content

TV programming in Europe is largely defined by thematic fragmentation.

- The greater part of the TV offering caters to special interest in the form of thematic channels.
- Thematic TV channels typically provide sport, entertainment, film and TV fiction content.

Programming of TV channels* available in Europe | May 2022 - In %



* *Excl. local TV channels since programming of local TV is difficult to assess.*

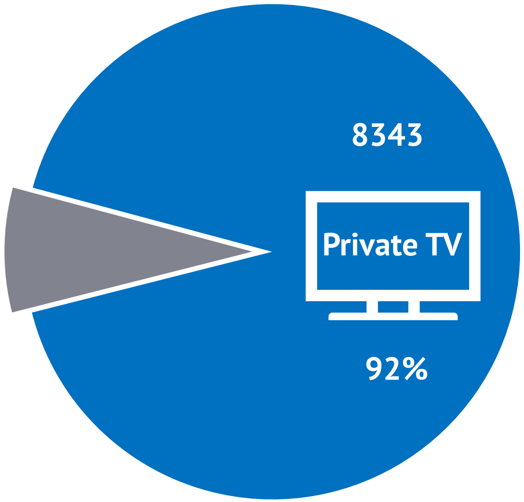
Source: European Audiovisual Observatory / MAVISE

The big picture – Private TV channels

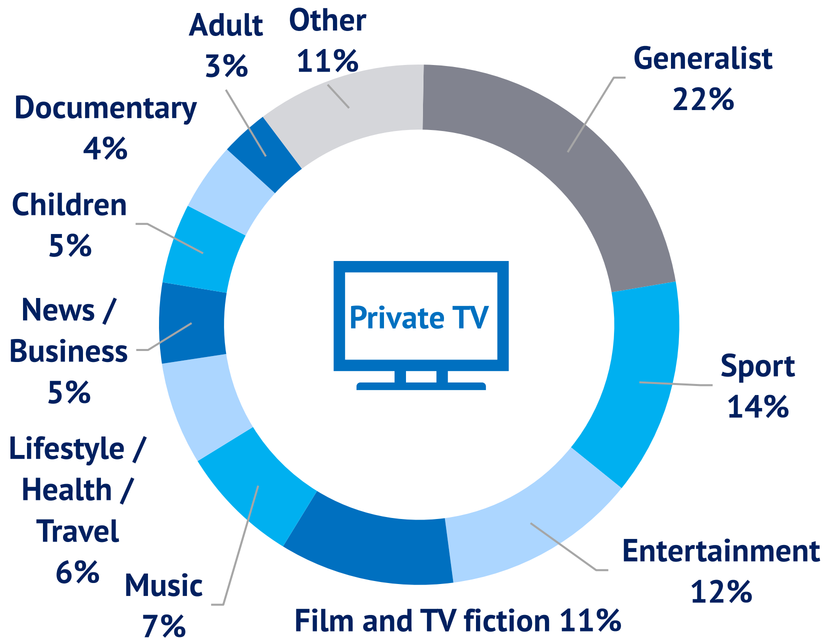
The great majority of TV channels in Europe are in private ownership.

- **Nine out of 10 TV channels in Europe are owned by private companies.**
- **Their programming focus is notably fragmented with over two thirds of private TV channels providing sports, entertainment, film and TV fiction, and other thematic content.**

Share of TV channels in private ownership | May 2022 - In number of services and %



Breakdown of private TV* by programming content | May 2022 - In number of services and %



** Excl. local TV channels since programming of local TV is difficult to assess.*

Source: European Audiovisual Observatory / MAVISE

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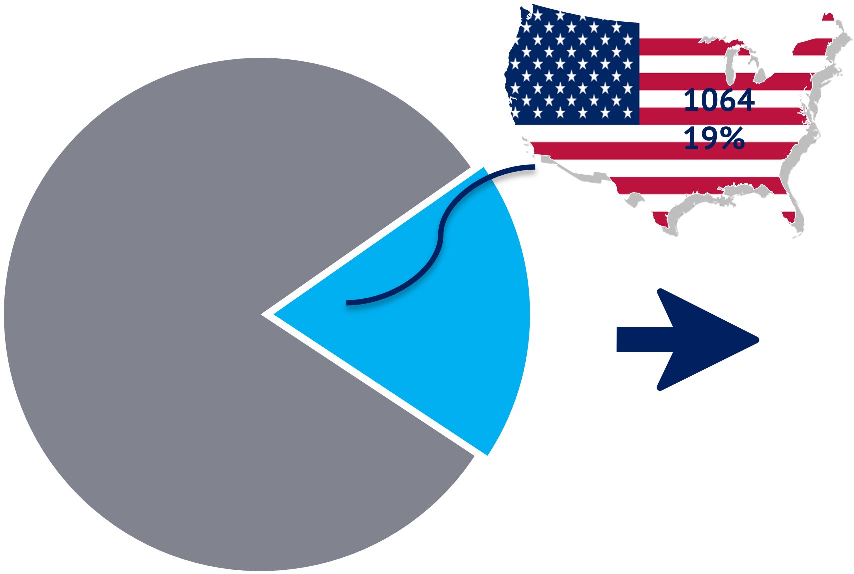
The big picture – US share among private TV channels

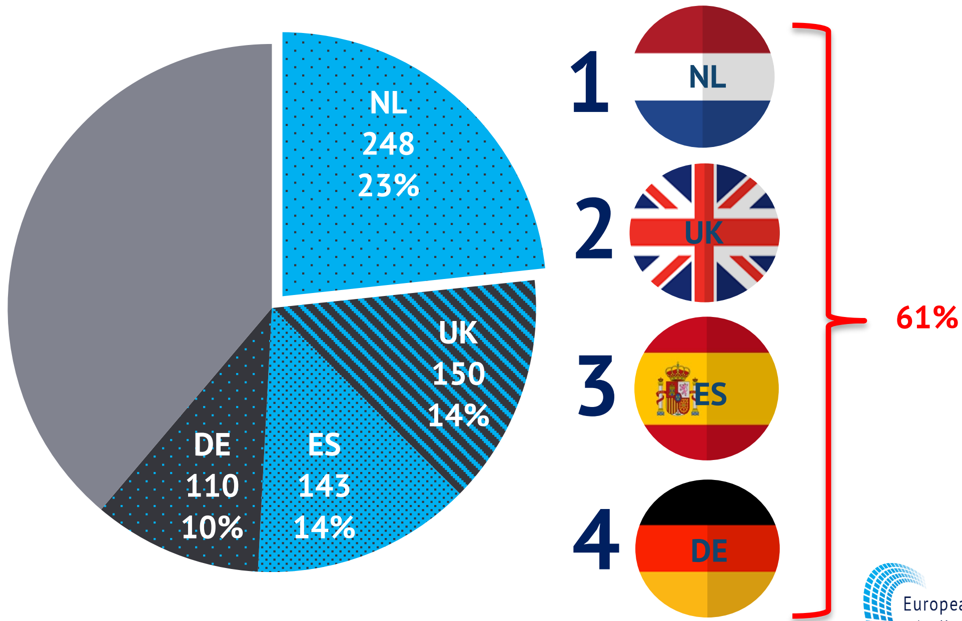
Around one in five private TV channels in Europe is US-owned.

- **19% of all private television services in Europe have a US parent company.**
- **Four countries account for 61% of all private US-owned TV channels.**

US share of TV channels* in private ownership | May 2022 - In number of services and %



Breakdown of US-owned private TV* by country of origin | May 2022 - In number of services and %



** Excl. local TV channels.*

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Source: European Audiovisual Observatory / MAVISE

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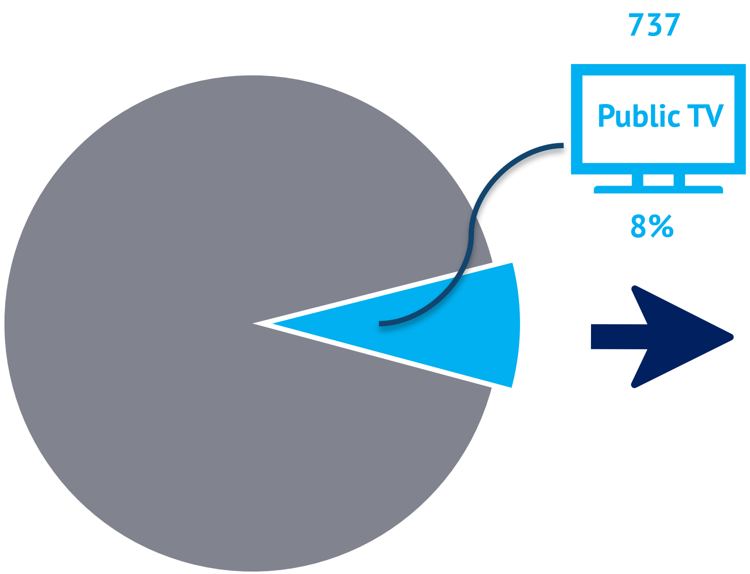
The big picture – Public TV channels

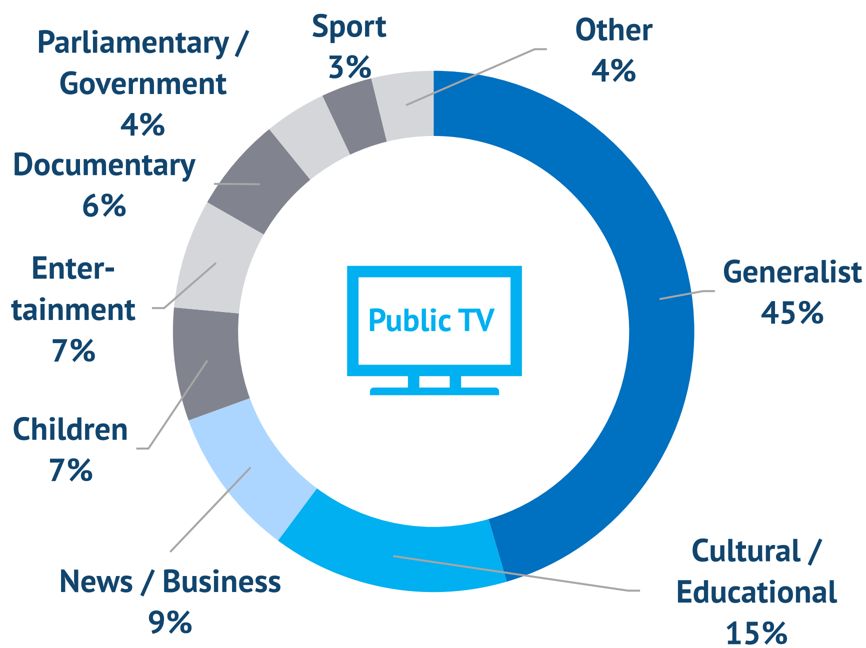
Around one in 10 TV channels in Europe is in public ownership.

- **Most public TV channels have a generalist or cultural and educational programming offering.**
- **This mirrors their public service remit to provide accessible programming for all members of society.**

Share of TV channels in public ownership | May 2022 - In number of services and %



Breakdown of public TV* by programming content | May 2022 - In number of services and %



** Excl. local TV channels since programming of local TV is difficult to assess.*

Source: European Audiovisual Observatory / MAVISE

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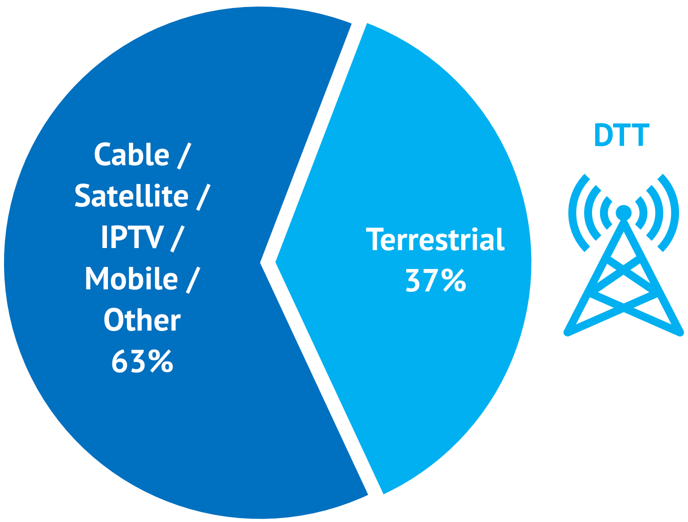
The big picture – TV networks

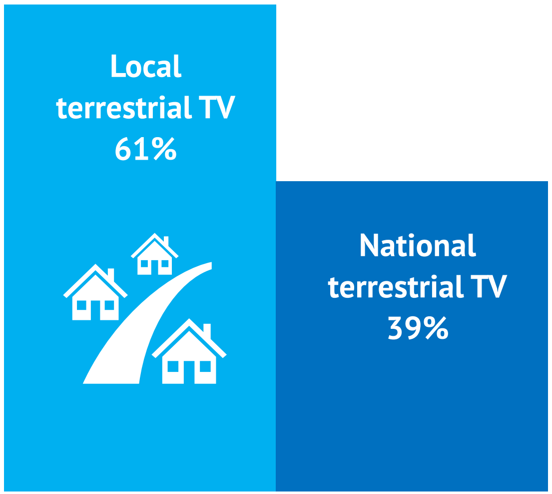
Around one in three TV channels in Europe is available on digital terrestrial networks.

- 37% of all TV channels in Europe are distributed on DTT networks.
- The importance of DTT networks for local TV is even more pronounced. A total of 61% of local TV channels are available on DTT networks, compared to 39% of national TV services.

Breakdown of all TV channels by network type | May 2022 - In %



Share of local and national TV on terrestrial networks | May 2022 - In %



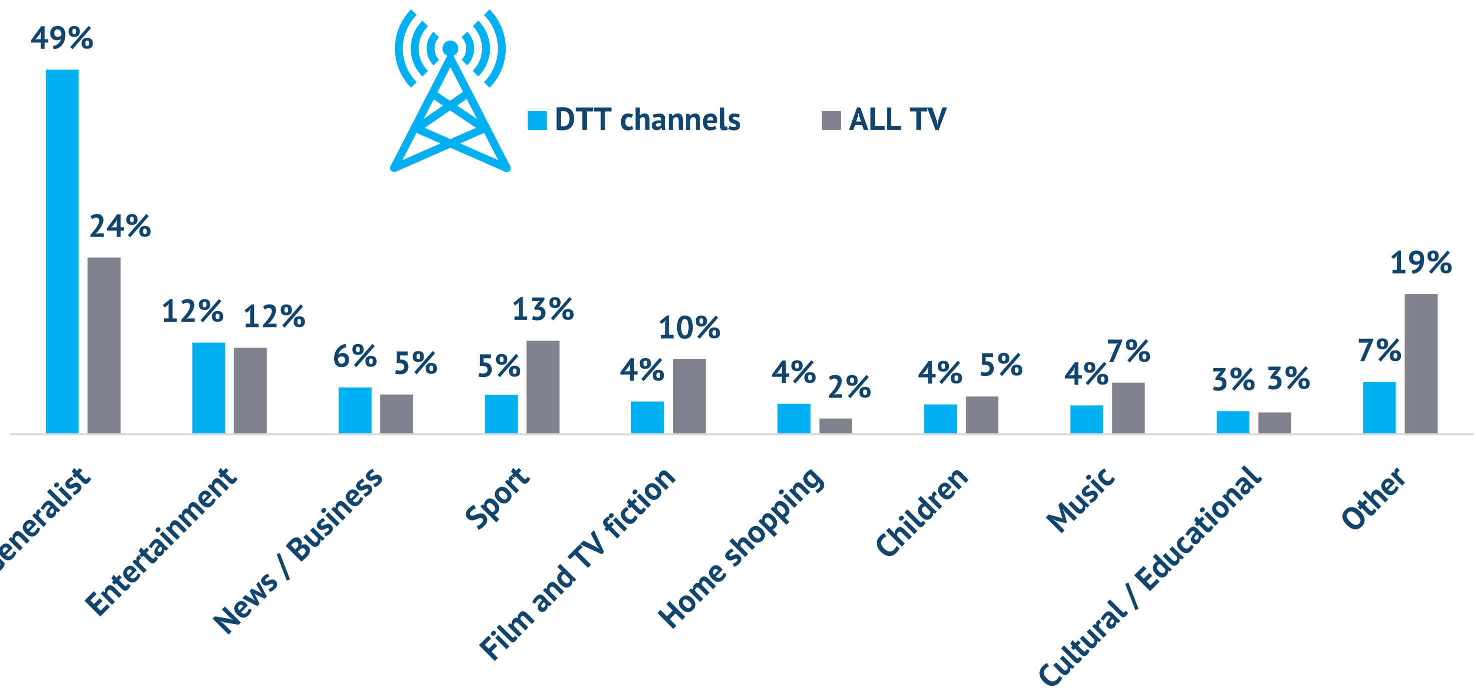
Source: European Audiovisual Observatory / MAVISE

The big picture – DTT channel programming

Around half of TV channels available on digital terrestrial networks have generalist programming.

- **Public service media are given priority regarding presence on DTT networks. Their TV services are mostly generalist channels with a broad programming offering.**
- **The programming content of TV channels available on all networks is more fragmented.**

Programming content of TV channels on DTT networks | May 2022 - In %



Source: European Audiovisual Observatory / MAVISE

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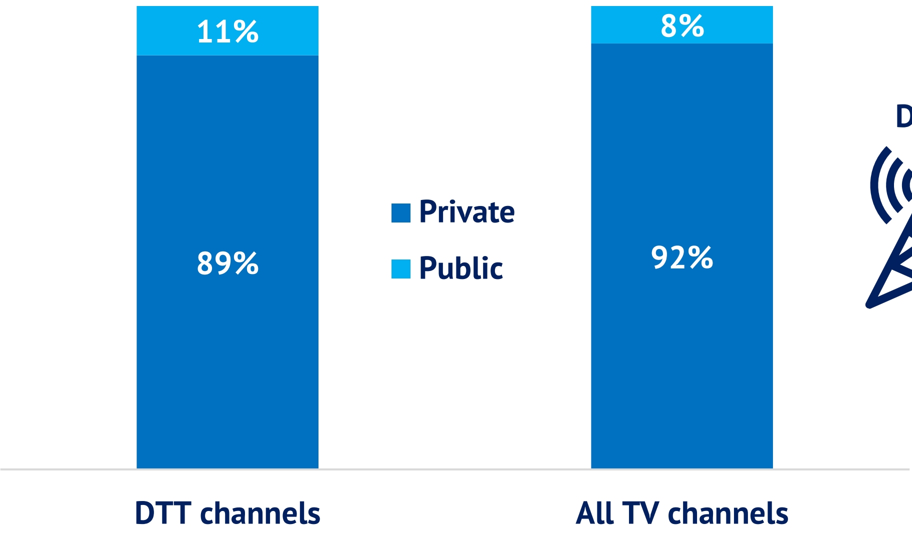
The big picture – DTT channel ownership

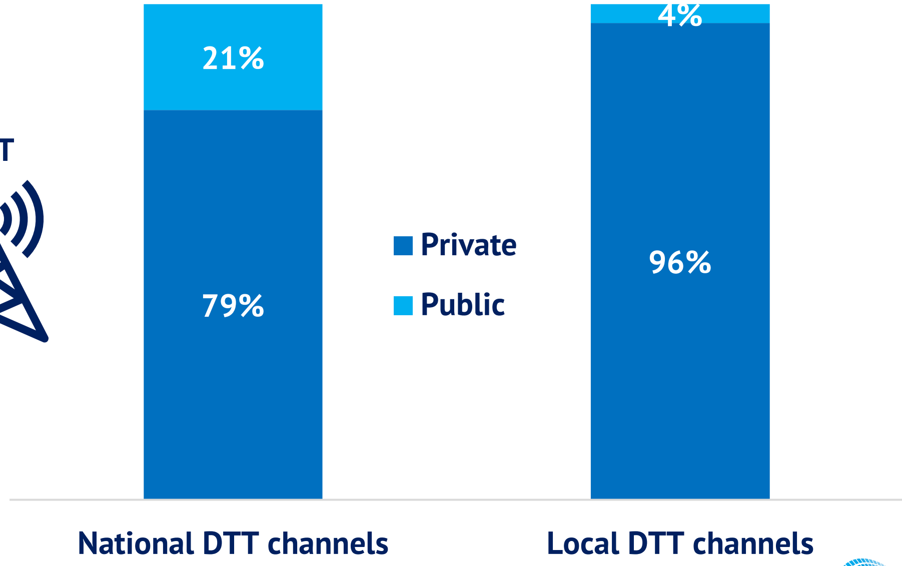
Around one in five national TV channels available on DTT networks is in public ownership.

- **The share of TV channels in public ownership distributed on DTT networks is slightly higher than among the overall number of TV channels available in Europe.**
- **There are more national public TV channels available on DTT networks than public local TV.**

Comparison of TV channels on DTT and all TV channels by ownership | May 2022 - In %



Comparison of national and local TV channels on DTT by ownership | May 2022 - In %



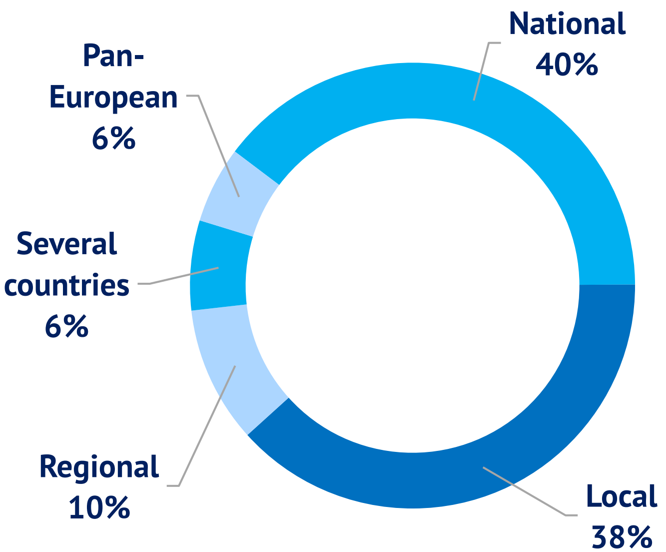
Source: European Audiovisual Observatory / MAVISE

The big picture – TV channel coverage

Around nine in 10 TV channels in Europe primarily serve domestic markets.

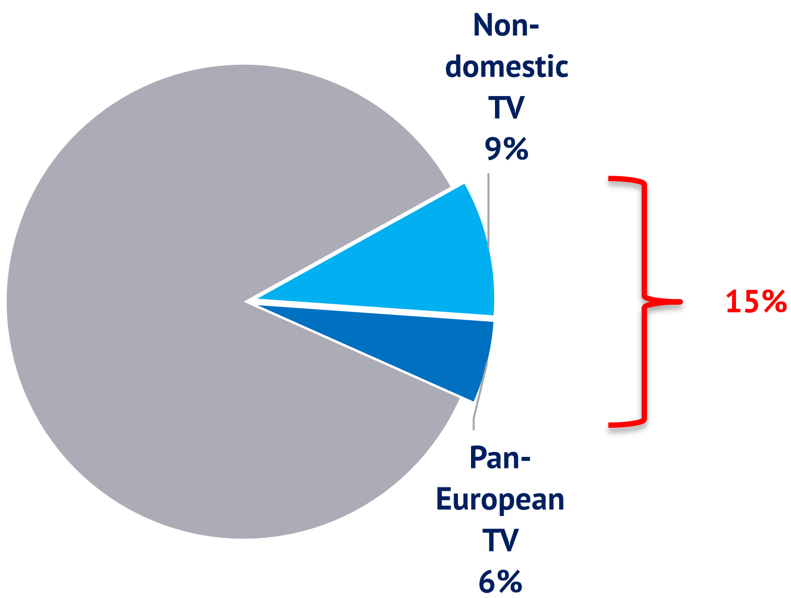
- **The biggest group of TV channels is those with a national and local coverage.**
- **Around 9% of all TV channels in Europe primarily serve non-domestic markets and another 6% are pan-European TV services.**

Breakdown of TV channels by coverage | May 2022 – In %



Coverage

Share of non-domestic* and pan-European TV channels | May 2022 - In %



** Non-domestic TV channels are those that principally serve a market other than their country of establishment.*
Some national TV channels serve a country different to their country of establishment. They are considered non-domestic TV channels.

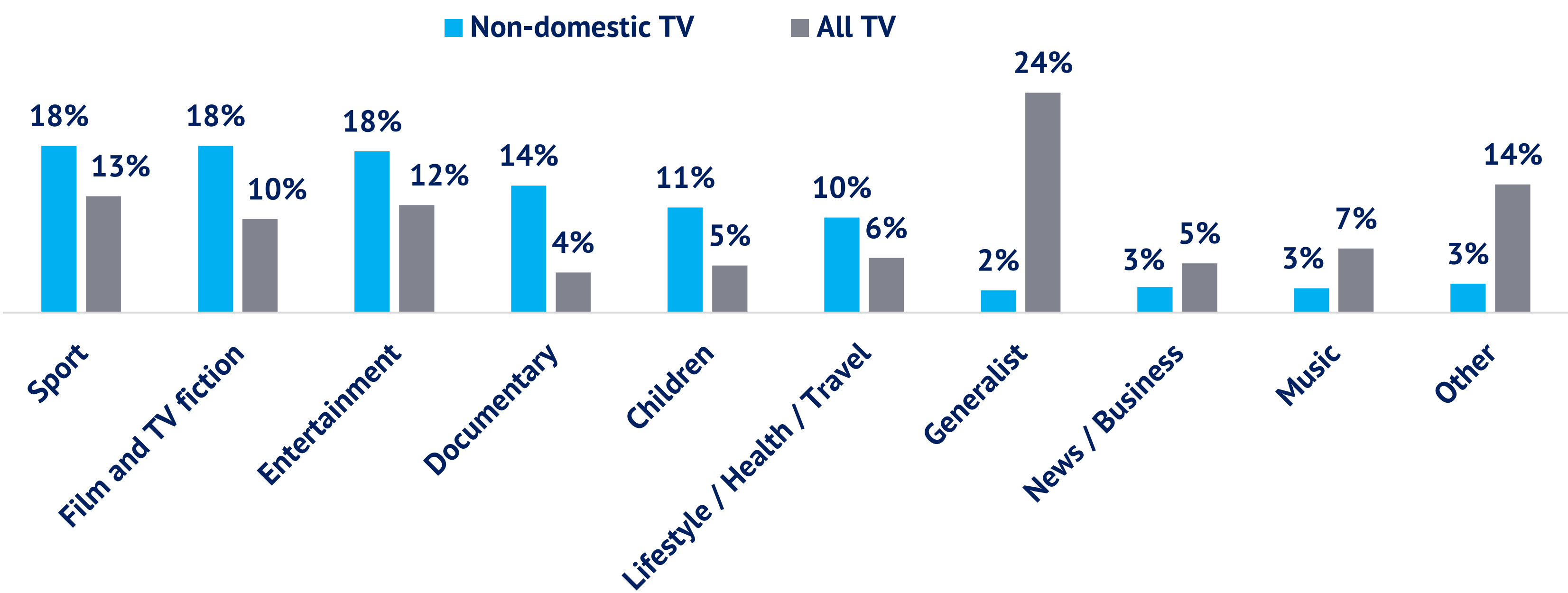
Source: European Audiovisual Observatory / MAVISE

The big picture – Non-domestic TV channel programming

The programming content of non-domestic TV channels is almost entirely thematic.

- **Non-domestic TV channels focus on sport, film and TV fiction, and entertainment content.**
- **Present in non-domestic TV are US networks such as Warner Bros. Discovery, Paramount or Disney, and European networks like the United Group belonging to British BC Partners or RTL belonging to German Bertelsmann.**

Programming content of non-domestic TV channels | May 2022 - In %



Source: European Audiovisual Observatory / MAVISE

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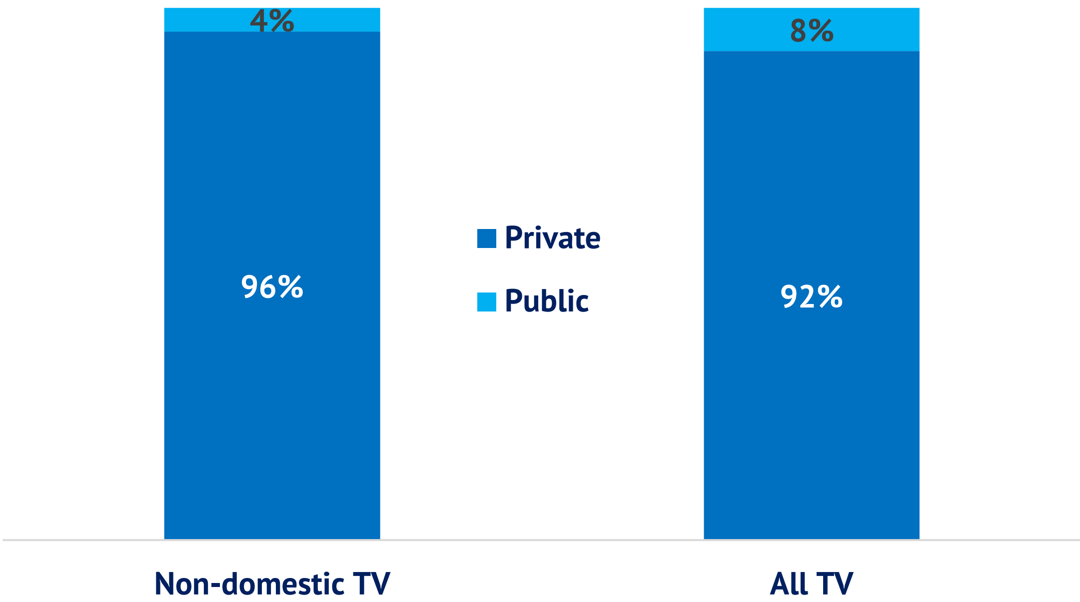
The big picture – Ownership of non-domestic TV channels

Non-domestic TV channels are predominantly in private ownership.

- **The share of TV services in public ownership is smaller among non-domestic TV channels.**
- **Apart from international news or some thematic channels, most public TV channels serve their respective domestic markets.**

Breakdown of non-domestic TV channels by ownership | May 2022 - In %



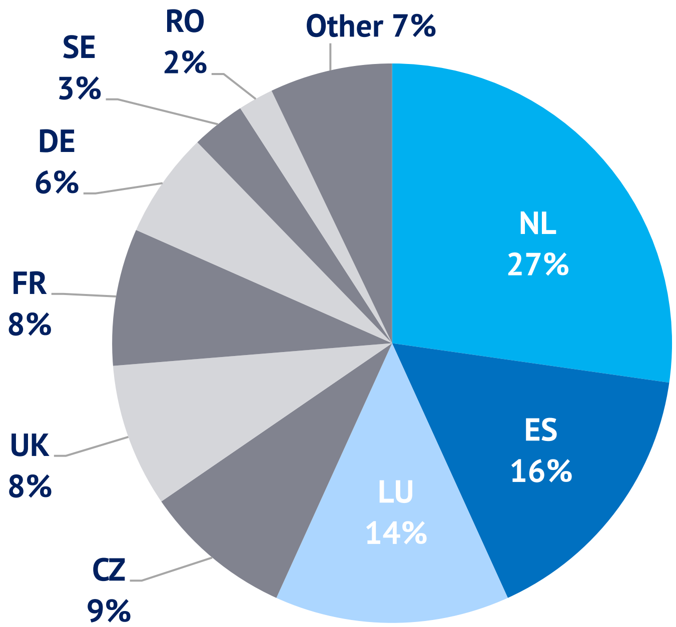
Source: European Audiovisual Observatory / MAVISE

The big picture – Non-domestic TV channel hubs

The main hubs for non-domestic TV channels are the Netherlands, Spain and Luxembourg.

- Nine countries account for 93% of TV channels mainly serving non-domestic markets.
- Luxembourg is a significant hub for European non-domestic TV channel networks.

Main hubs for non-domestic TV channels | May 2022 - In %



Examples of non-domestic TV networks based in top 3 hubs | May 2022

1. **NL** — US: Warner Bros. Discovery (WBD), Paramount Global, Disney
   EUR: BBC, Antenna Group, Vivendi
2. **ES** — US: Disney, Comcast, AMC Networks, Paramount
   JP: Sony Corporation
   EUR: Vivendi
3. **LU** — EUR: United Group (BC Partners), RTL (Bertelsmann), Mediawan, Vivendi
   US: Sky (Comcast)

Source: European Audiovisual Observatory / MAVISE

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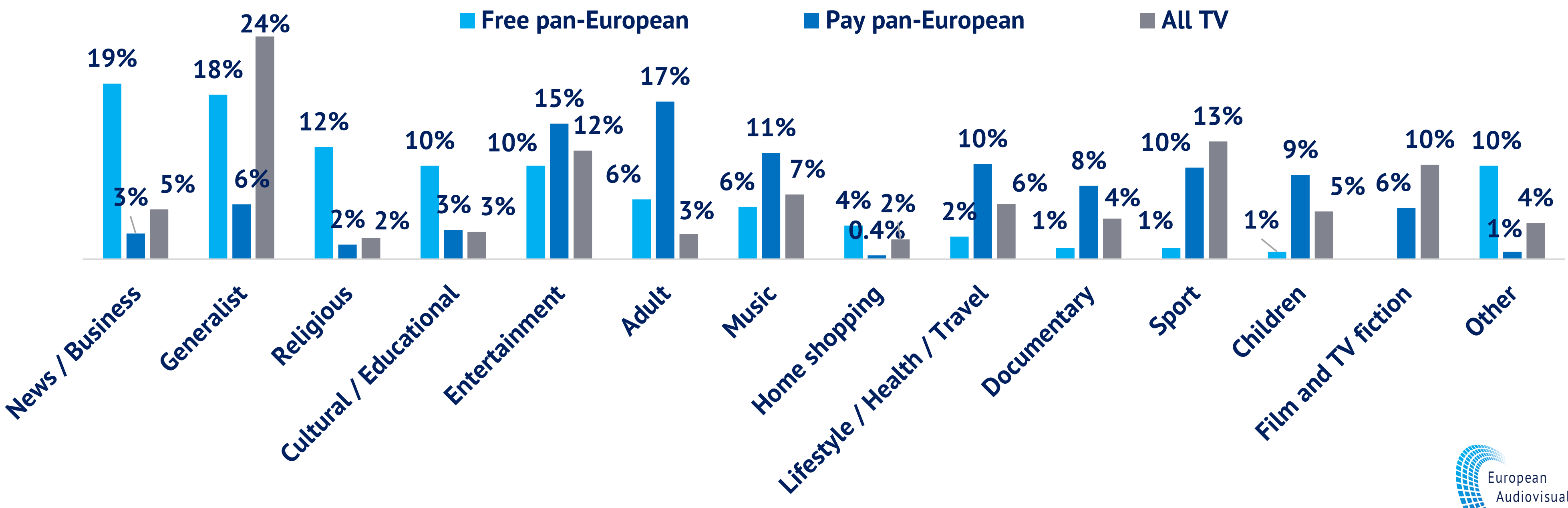
The big picture – Pay and free pan-European TV channel programming

The programming content of free and pay pan-European TV channels is dichotomous.

- **Free pan-European TV channels focus on news and generalist content.**
- **Pan-European pay TV channels concentrate on adult and entertainment programming.**

Programming content of free and pay pan-European TV channels | May 2022 - In %



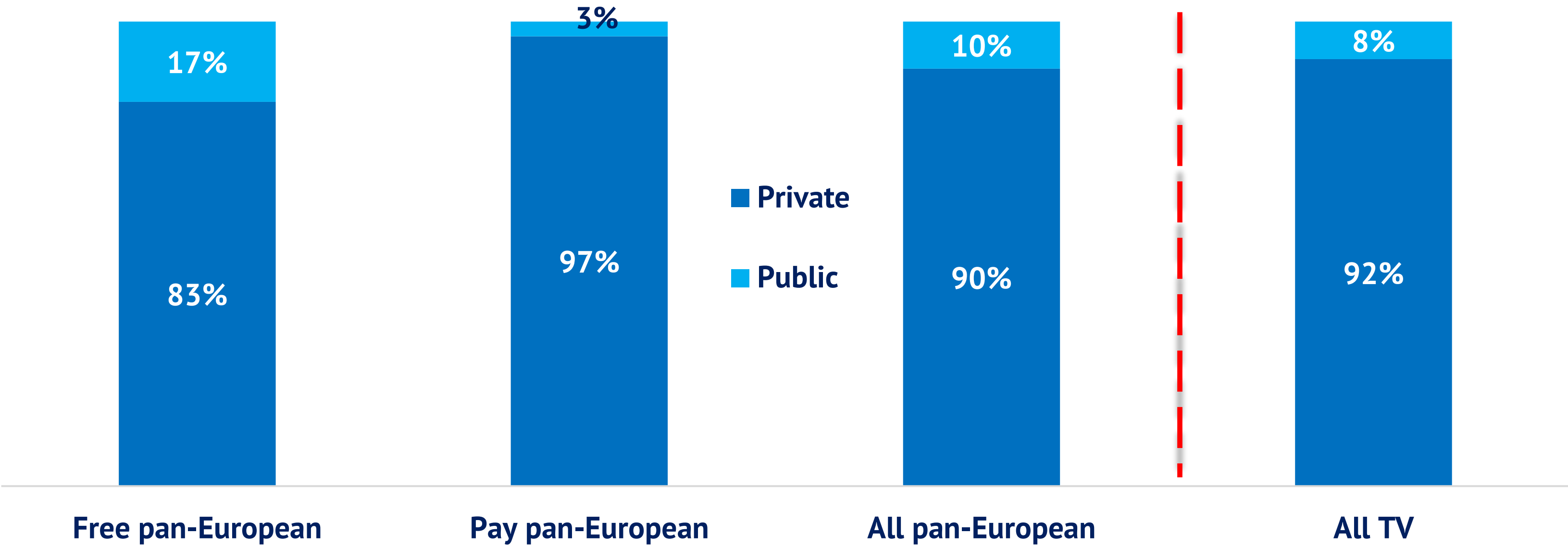
Source: European Audiovisual Observatory / MAVISE

The big picture – Ownership of pan-European TV channels

Public service media are well represented among free pan-European TV channels.

- Free pan-European public channels are focused on news, cultural-educational and generalist content.
- Most public TV channels available across Europe are from Spain, Russia and Germany.

Breakdown of pan-European TV channels by ownership | May 2022 - In %



Source: European Audiovisual Observatory / MAVISE

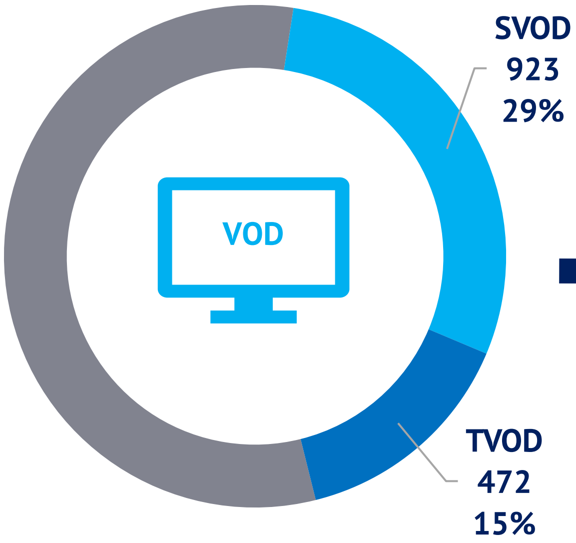
The big picture – On-demand services

The big picture – Types of on-demand services

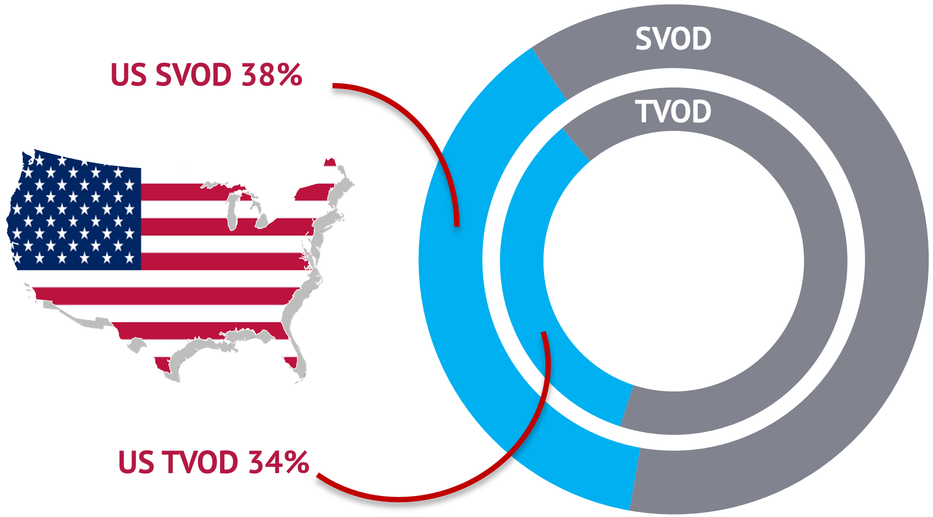
One in four audiovisual media services in Europe is an on-demand service.

- A substantial part of on-demand services comprises SVOD (29%) and TVOD (15%). Other non-linear services include AVOD, catch-up TV and video-sharing platforms.
- Over one third of SVOD and TVOD services available in Europe belong to US global streamers.

Share of SVOD and TVOD available in Europe* | May 2022 - In number of services and %



Share of US global streamers among SVOD and TVOD | May 2022 - In %



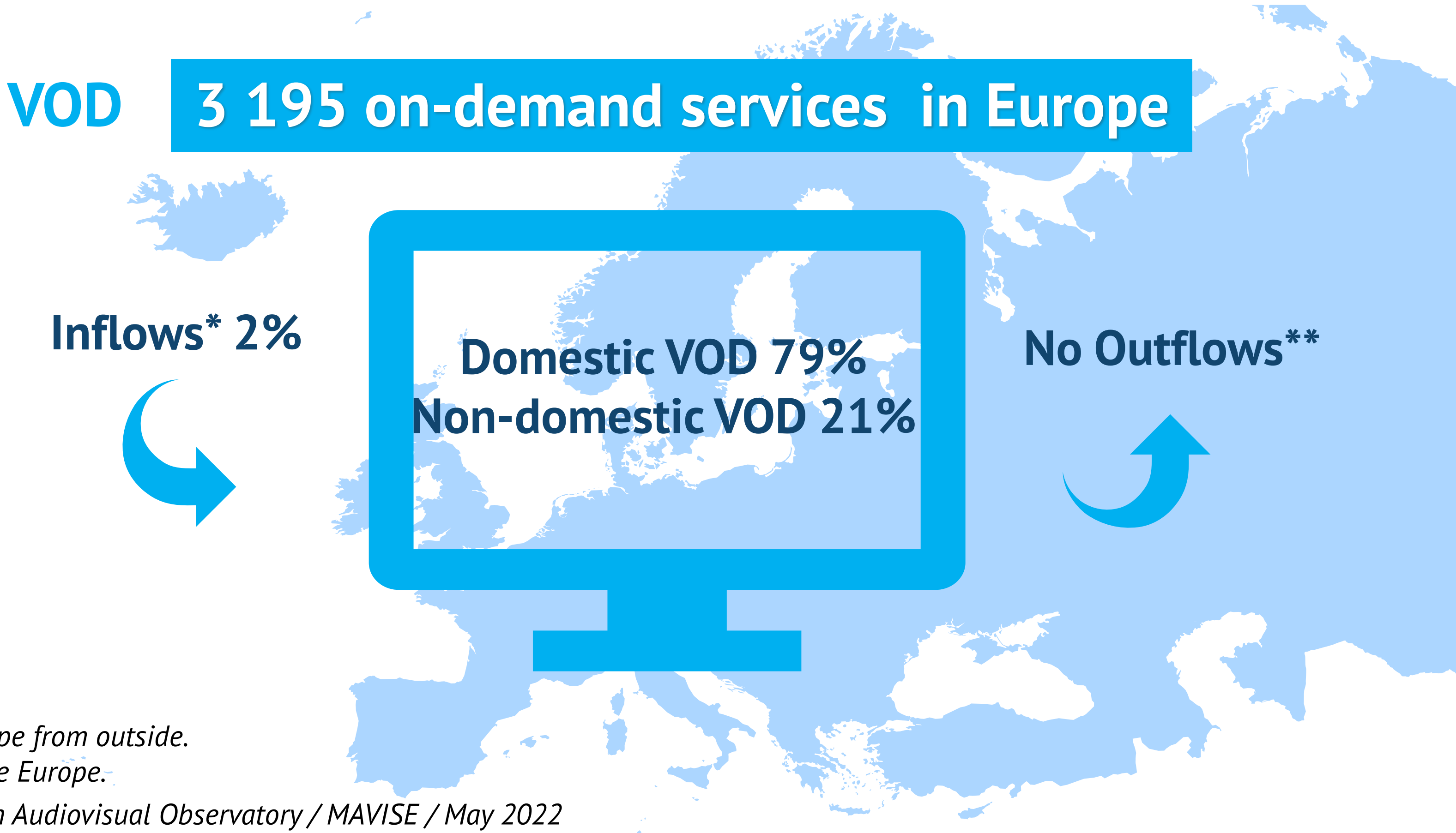
** SVOD stands for subscription video on-demand and TVOD for transactional video on demand.*
For multi-country SVOD and TVOD services, one catalogue is counted as one service.
Source: European Audiovisual Observatory / MAVISE

European Audiovisual Observatory

The big picture – On-demand services in Europe

Around one in five on-demand services in Europe serves non-domestic markets.

- **On-demand services targeting Europe from outside make up just 2%.**
- **Conversely, there are no VOD exports out of Europe.**



* *Targeting Europe from outside.*
** *Exports outside Europe.*

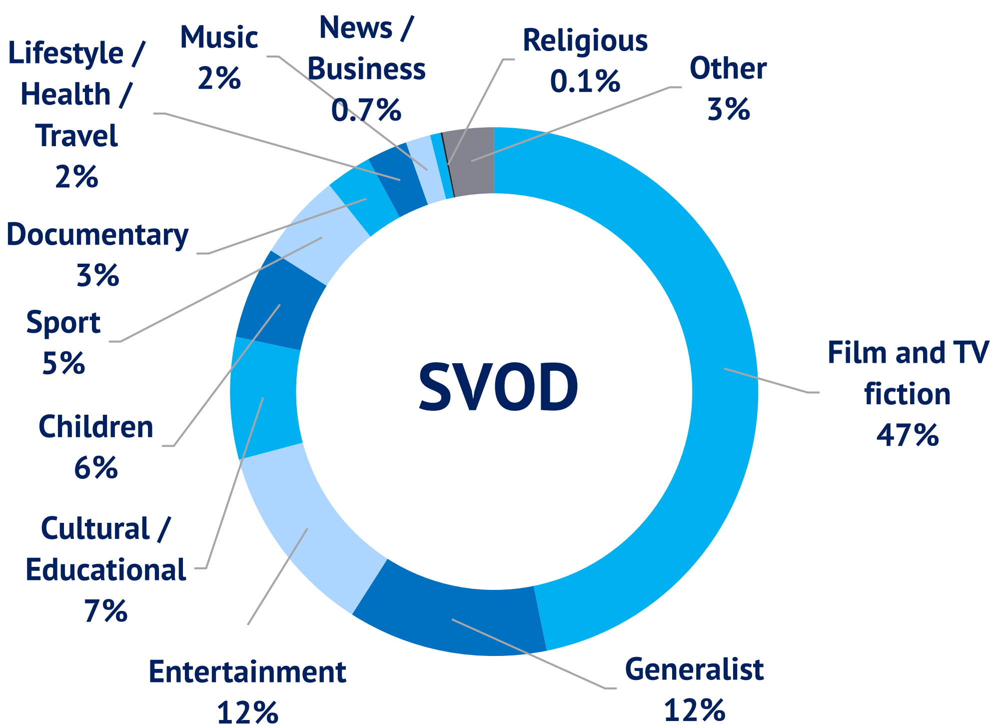
Source: European Audiovisual Observatory / MAVISE / May 2022

The big picture – SVOD programming

SVOD services in Europe still offer primarily film and TV fiction programming.

➢ **Increasingly, the programming content of SVOD services previously concentrated on film and TV fiction is becoming more diverse (e.g. children and reality TV).**

Programming content of SVOD services | May 2022 - In %



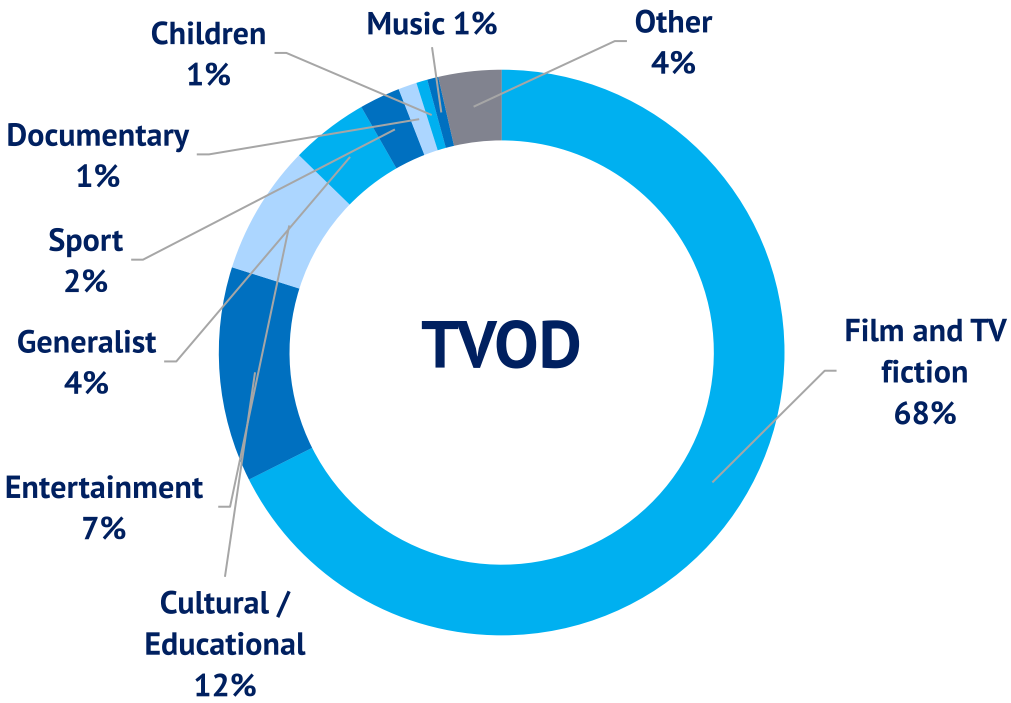
Source: European Audiovisual Observatory / MAVISE

The big picture – TVOD programming

TVOD offers the most cinema-like services with over two thirds of TVOD services providing film and TV fiction content.

- ➢ **The comparatively small TVOD offering for children suggests that the market has been captured by the big streaming services.**

Programming content of TVOD services | May 2022 - In %



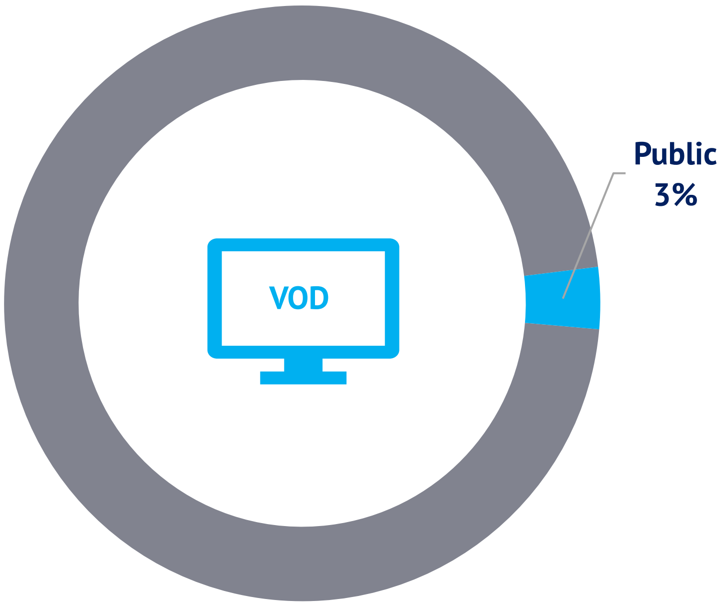
Source: European Audiovisual Observatory / MAVISE

The big picture – Ownership of on-demand services

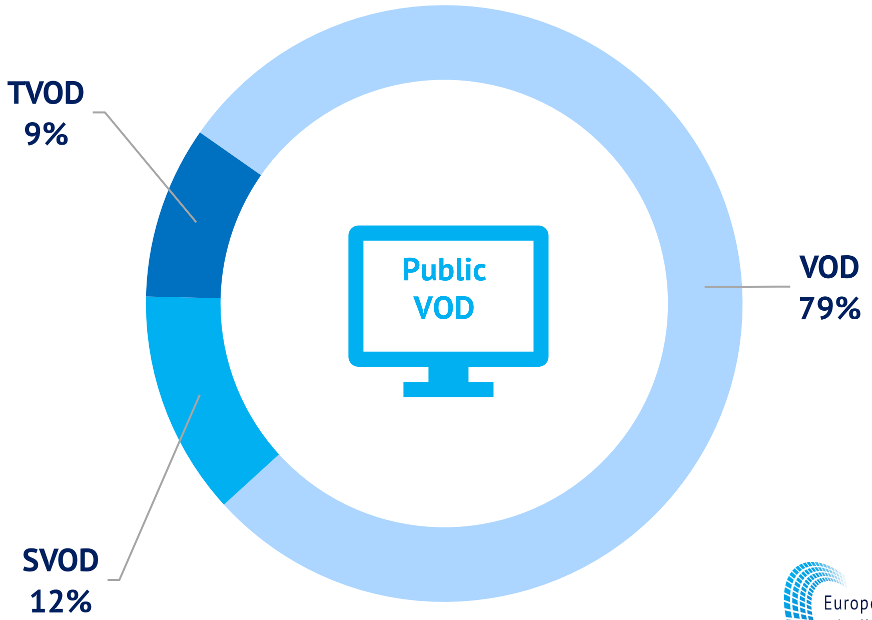
The overwhelming majority of on-demand services in Europe are in private ownership.

- PUBs have entered the VOD market as well (3%), offering mostly free catch-up.
- One in five public on-demand services is a paid TVOD or SVOD service. In some cases public services are monetised for non-national audiences (e.g. BBC iPlayer) or specific professional target groups (e.g. ARTE).

Breakdown of on-demand services by ownership | May 2022 - In %



Breakdown of non-linear public service media by type of service | May 2022 – In %



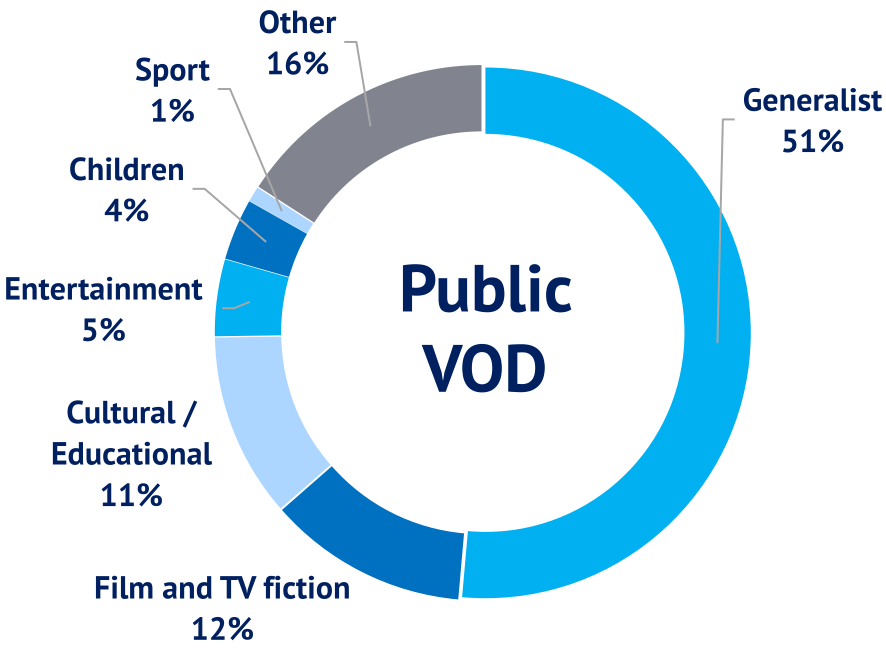
Source: European Audiovisual Observatory / MAVISE

The big picture – Programming of public on-demand services

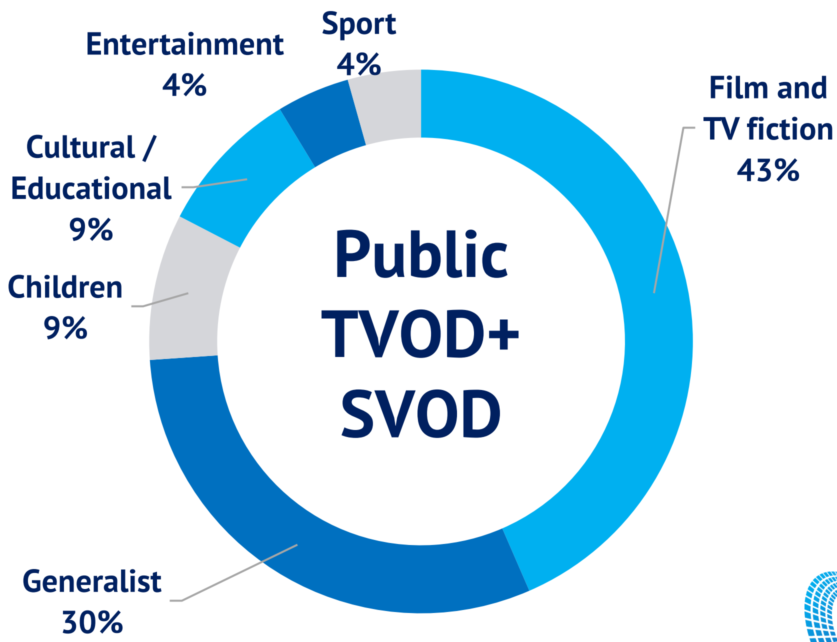
As with TV, most of the non-linear programming offerings of public broadcasters have a generalist focus.

- **While half of the non-linear content offerings are generalist catch-up TV, public broadcasters also provide thematic programming such as film archives and cultural and educational online services.**
- **As is the case with private SVOD and TVOD services, public versions typically offer film and TV fiction programming.**

Programming content of public on-demand services | May 2022 - In %



Programming content of public TVOD and SVOD services | May 2022 - In %



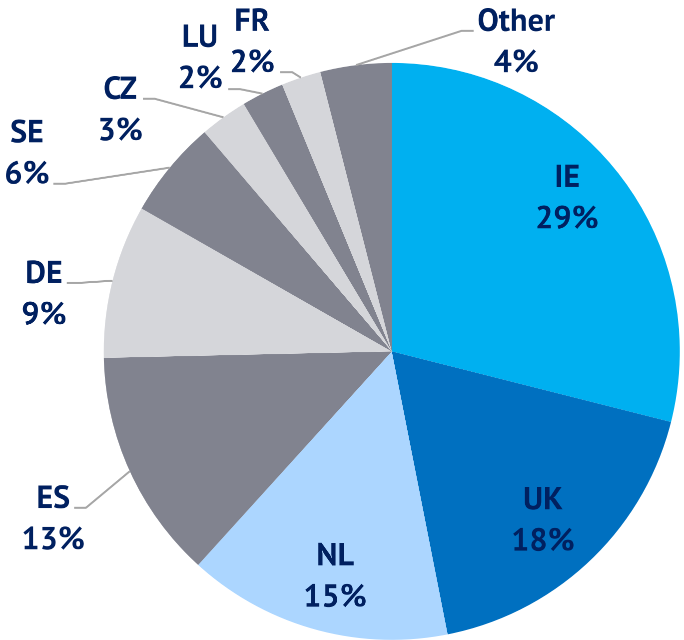
Source: European Audiovisual Observatory / MAVISE

The big picture – Hubs of non-domestic on-demand services

The main hubs for non-domestic on-demand services are Ireland, the UK and the Netherlands.

- **Nine countries account for 96% of on-demand services mainly serving non-domestic markets.**
- **Ireland, the UK and the Netherlands are the hubs for the most significant US global streaming players.**

Main hubs for non-domestic VOD services | May 2022 - In %



Examples of non-domestic VOD networks based in top 3 hubs | May 2022

1 

US: Alphabet (Google Play, YouTube), Apple (Apple TV, iTunes Store), Huawei (Huawei Video), Microsoft (MSN, Microsoft Store – Movies and TV)

2 

US: Warner Bos. Discovery (WBD), Comcast, Disney, Starz, AMC Networks, Paramount Global
EUR: Sandbox Edutainment, Vivendi, Viaplay, ITV, BBC

3 

US: Netflix, Disney, Warner Bros. Discovery (WBD), Liberty Global
EUR: Antenna Group

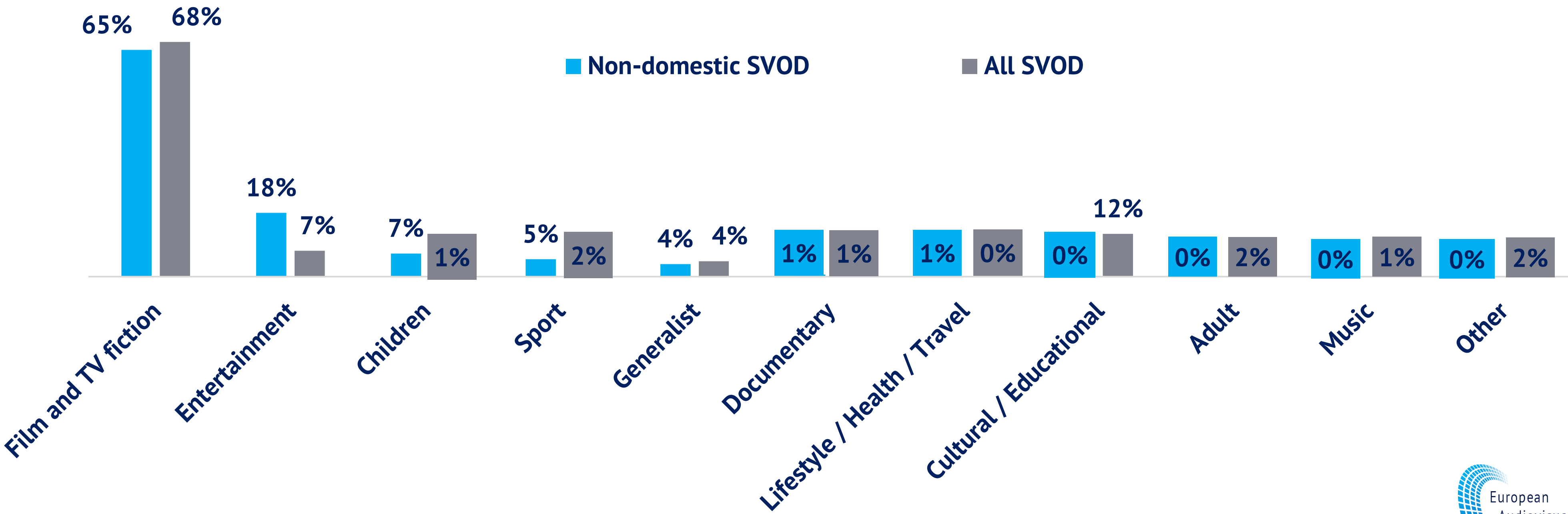
Flag icons © Copyright Showeet.com
Source: European Audiovisual Observatory / MAVISE

The big picture – Programming of non-domestic SVOD services

Non-domestic SVOD services focus heavily on film, TV fiction and entertainment content.

- **Compared to SVOD services in general, there are more non-domestic SVOD services dedicated to children. The majority of these are pan-European services operating in several countries.**
- **Cultural and educational SVOD services are exclusively targeted at domestic audiences.**

Programming content of of non-domestic SVOD services | May 2022 - In %

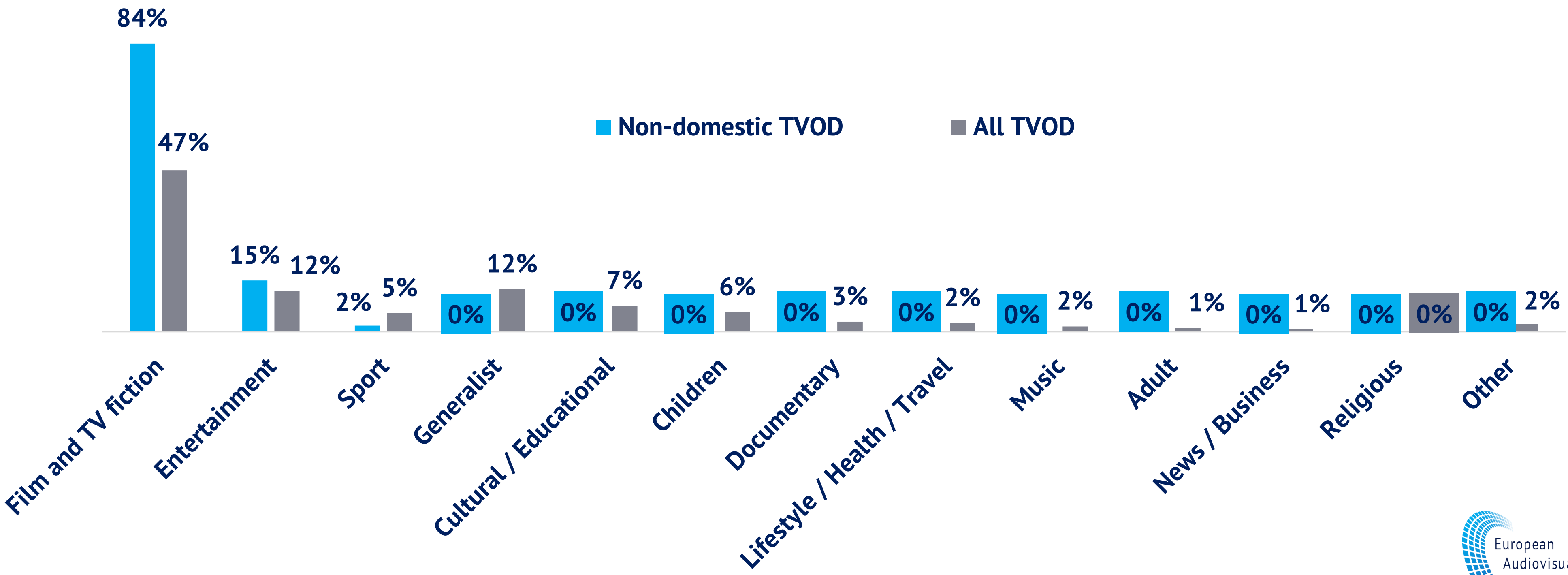


Source: European Audiovisual Observatory / MAVISE

Non-domestic TVOD services are purely concentrated on three types of programming content.

- ➢ **Non-domestic TVOD services exclusively offer film and TV fiction, entertainment and sports content.**
- ➢ **All other programming types are wholly targeted at domestic audiences.**

Programming content of of non-domestic TVOD services | May 2022 - In %



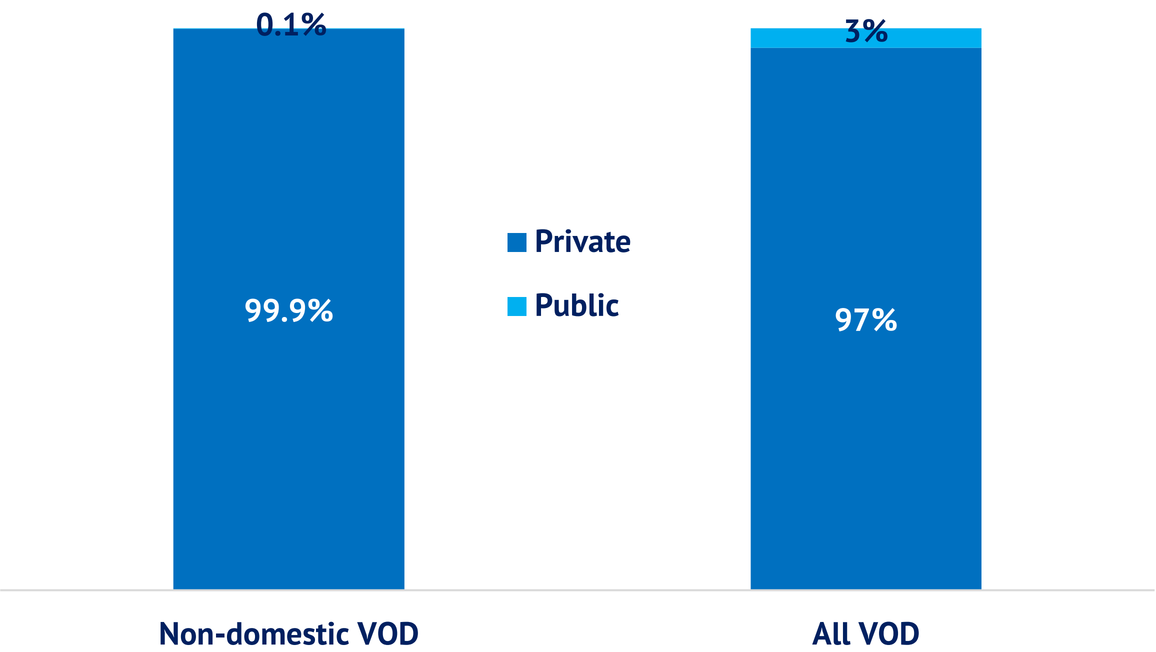
Source: European Audiovisual Observatory / MAVISE

The big picture – Ownership of non-domestic on-demand services

Non-domestic on-demand services are almost entirely in private ownership.

- The share of on-demand services in public ownership is even smaller among non-domestic ones.
- Apart from the BBC iPlayer, all other on-demand services which primarily focus on foreign markets belong to a private company.

Breakdown of non-domestic on-demand services by ownership | May 2022 - In %



Source: European Audiovisual Observatory / MAVISE

Part II. Main players

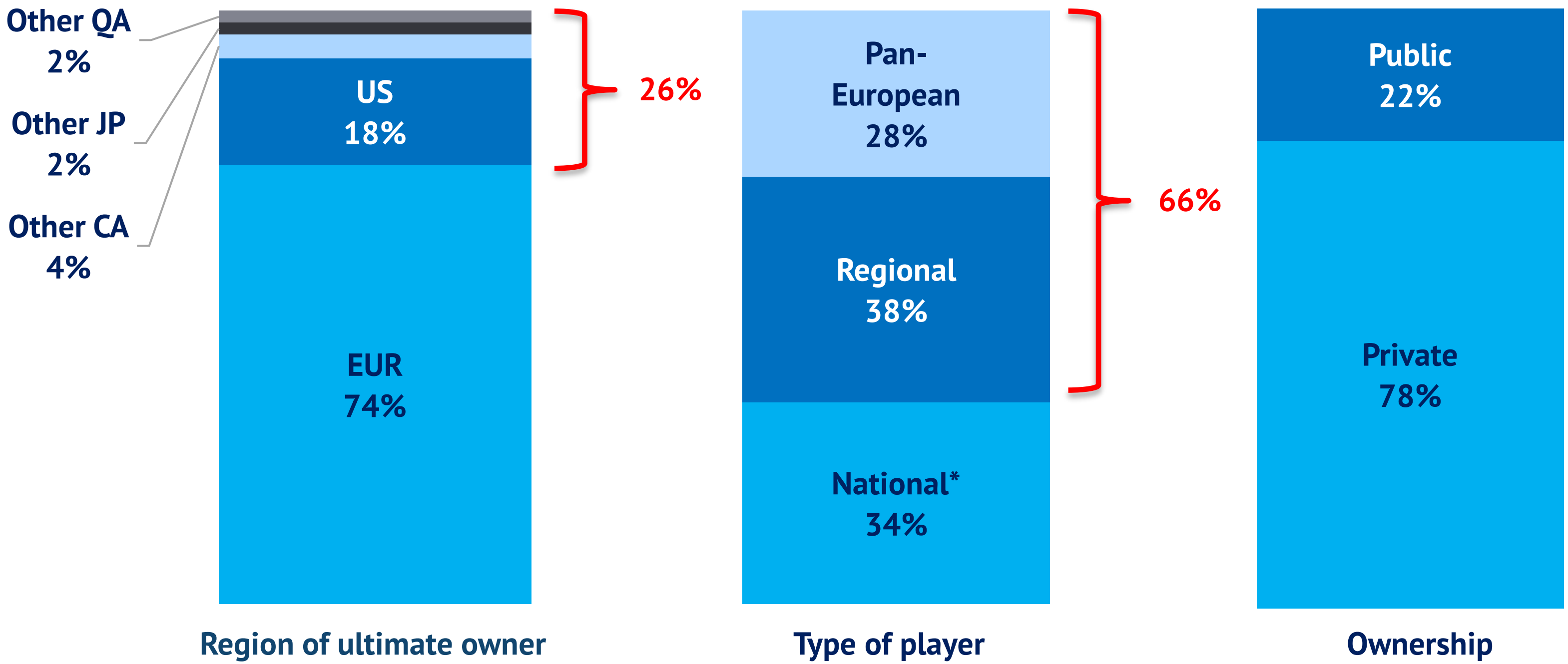
Main players – Top 50

Main players – The top 50 TV groups

One in four of the top TV groups in Europe by number of services has a non-European parent company.

- **Two thirds of the top 50 TV groups in Europe operate services outside their domestic markets. A total of 38% do so within a regional scope and 28% on a pan-European level.**
- **One in five of the top 50 TV groups is a public service broadcaster.**

Breakdown of top 50 TV groups by region of ultimate owner, type of player and ownership | May 2022 - In %



** A national player is a group that operates all or most of its services in the domestic market.*

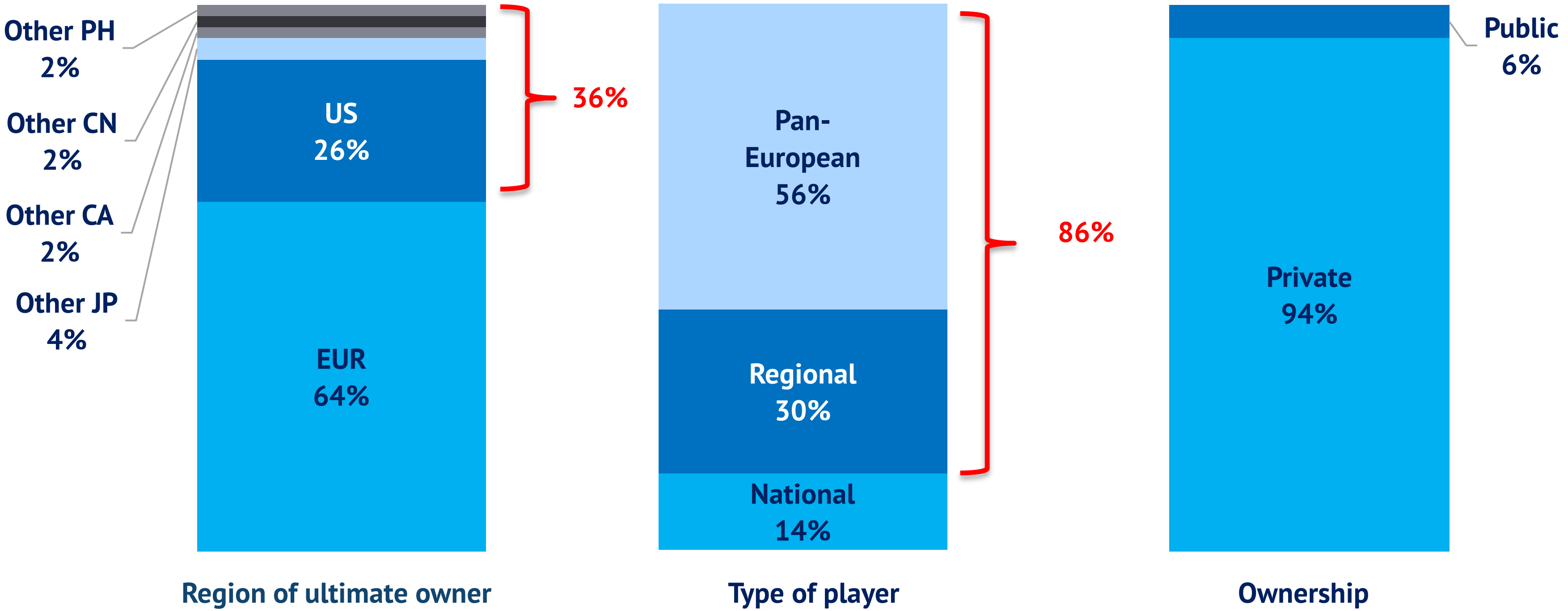
Source: European Audiovisual Observatory / MAVISE

Main players – The top 50 groups for on-demand services

More than one third of the main groups for on-demand services in Europe by number of services has a non-European parent company.

- **Four out of five of the top 50 on-demand service groups in Europe operate services outside their domestic markets. Private on-demand service groups represent the majority in the top 50 ranking.**

Breakdown of top 50 on-demand service groups by region of ultimate owner, type of player and ownership | May 2022 - In %



** A national player is a group that operates all or most of its services in the domestic market.*

Source: European Audiovisual Observatory / MAVISE

Main players – Top 10

Main players – Markets and main brands of top 10 TV groups

	European Group | Parent company	Owner-ship	No. TV	No. markets*	Main brands**
1	Warner Bros. Discovery (Europe) | AT&T (US)	Private	360	45	Animal Planet, Boomerang, Cartoon Network, Discovery, Eurosport, HBO
2	Paramount (Europe) | Paramount (US)	Private	203	41	Comedy Central, MTV, Nick Junior, Nickelodeon, Paramount, Pluto TV
3	Comcast (Europe) | Comcast (US)	Private	172	36	13th Street, CI, Diva, E! Entertainment, History, Sky
4	The Walt Disney Company (Europe) | The Walt Disney Company (US)	Private	130	45	24 Kitchen, Disney Channel, ESPN, Fox, National Geographic
5	Groupe Canal Plus (FR) | Vivendi (FR)	Private	113	27	Canal+, Ciné+, Filmbox
6	United Group (CZ) | BC Partners (UK)	Private	99	10	Diema Sport, N1 TV, Nova, SK Sport Klub
7	AMC Networks (Europe) | AMC Networks Inc (US)	Private	70	29	AMC TV, CBS, JimJam, Spektrum TV, Sundance TV, TV Paprika
8	BBC (UK) | Government of United Kingdom (UK)	Public	70	25	BBC Brit, BBC Earth, BBC Entertainment, BBC First, Cbeebies
9	Telekom Srbija (RS) | Government of Serbia (RS)	Public	62	6	Arena Sport, TV Prva, TV KCN
10	Pink Media Group (RS) | Pink Media Group (RS)	Private	59	6	Pink

* *Excl. non-EUR countries; incl. microstates; number of countries a group is present in at least once; no doubling.*
** *Main brands by group; not exhaustive.*

Source: European Audiovisual Observatory / MAVISE / May 2022

Main players – Markets and main brands of top 10 groups for on-demand services

	European Group | Parent company	Ownership	No. VOD	No. markets*	Main brands**
1	Warner Bros. Discovery (Europe) | AT&T (US)	Private	149	30	Discovery, Eurosport, HBO Max
2	Google (Europe) | Alphabet (US)	Private	99	38	Google Play, YouTube Premium
3	Rakuten Europe (ES) | Rakuten Inc (JP)	Private	76	40	Rakuten TV
4	The Walt Disney Company (Europe) | The Walt Disney Company (US)	Private	69	36	Disney+, Fox+, Nat Geo+
5	Groupe Canal Plus (FR) | Vivendi (FR)	Private	64	12	Canal+, Filmbox+
6	Apple (Europe) | Apple Inc (US)	Private	60	31	Apple TV+, iTunes Store
7	Comcast (Europe) | Comcast (US)	Private	54	15	Hayu, Peacock, Sky Go/Now
8	Amazon Prime Video (Europe) | Amazon Inc (US)	Private	46	39	Amazon Prime
9	AMC Networks (Europe) | AMC Networks Inc (US)	Private	46	22	Acorn TV, AMC, CBS, MGM, Minimax, Shudder
10	Paramount (Europe) | Paramount (US)	Private	41	16	Nickelodeon, Paramount+, Pluto TV

* *Excl. non-EUR countries; incl. microstates; number of countries a group is present in at least once; no doubling.*
** *Main brands by group; not exhaustive.*

Source: European Audiovisual Observatory / MAVISE / May 2022

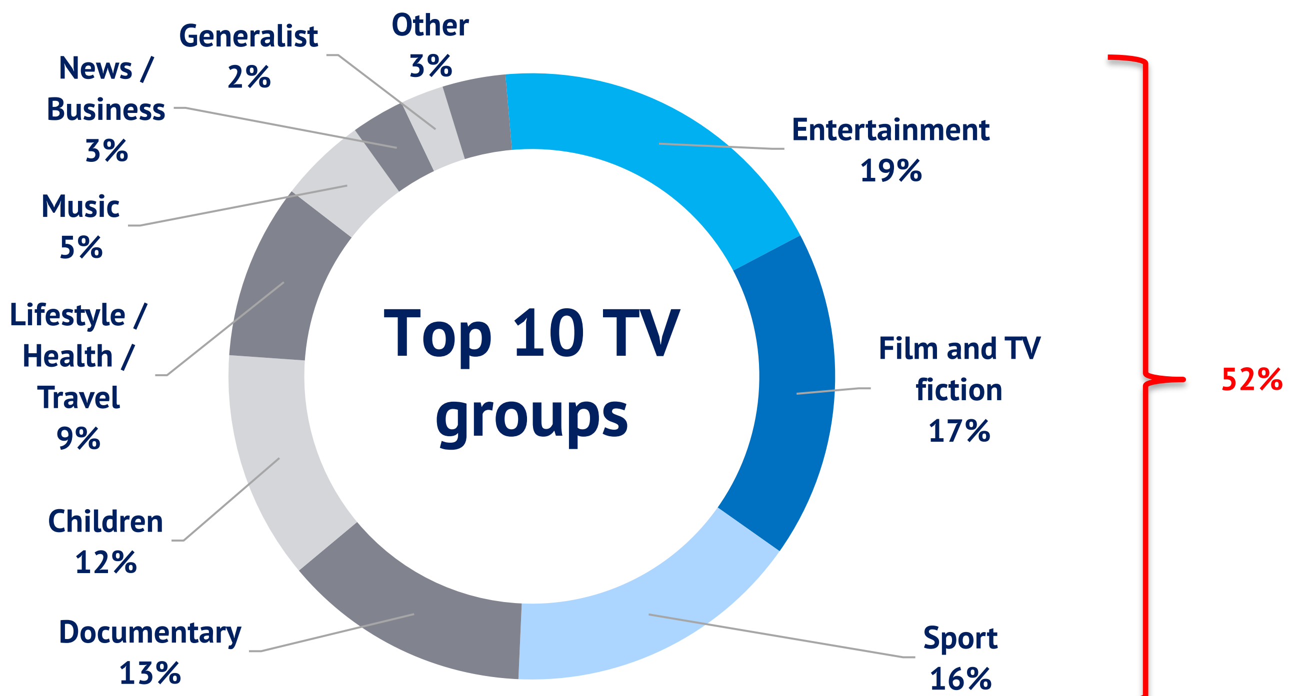
European Audiovisual Observatory

Main players – Programming content of top 10 TV groups

The top 10 TV groups in Europe represent 15% of the total TV channel offering in Europe.

- **Almost all the top 10 TV group brands comprise thematic channels catering to specialist interests. TV channels with generalist programming make up just 2%.**
- **More than half of the channel portfolio of the top 10 TV groups consists of entertainment, film and TV fiction, and sports programming.**

Programming content of top 10 TV groups in Europe | May 2022 - In %



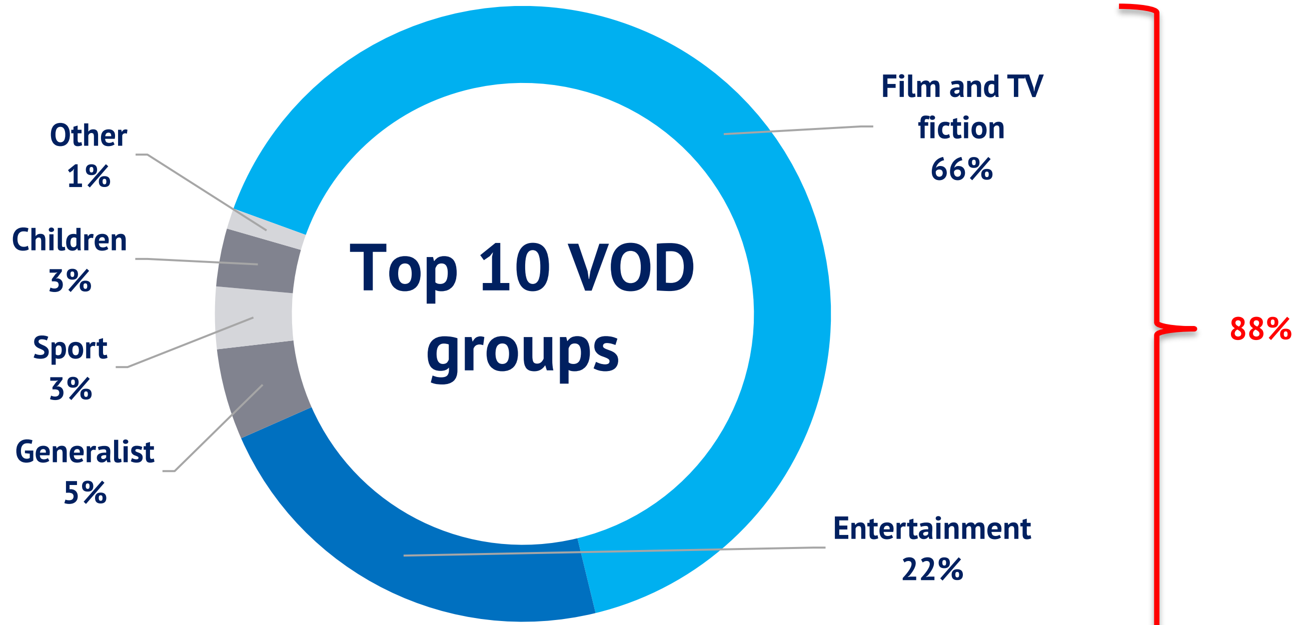
Source: European Audiovisual Observatory / MAVISE

Main players – Programming content of top 10 groups for on-demand services

The top 10 groups for on-demand in Europe represent 22% of the total service offering in Europe.

- **Almost all the top 10 VOD group brands comprise thematic TVOD and SVOD services catering to specialist interests. The share of services offering generalist programming is 5%.**
- **The overwhelming majority - around nine in 10 services of the top 10 VOD groups - offer film and TV fiction, and entertainment programming.**

Programming content of top 10 groups for on-demand services in Europe* | May 2022 - In %



** Includes TVOD and SVOD services only as programming of other VOD services is difficult to assess.*

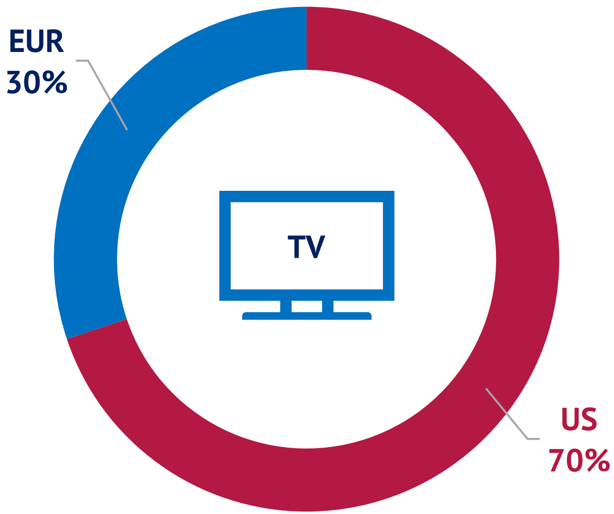
Source: European Audiovisual Observatory / MAVISE

Main players – US share among top 10 groups for TV and on-demand services

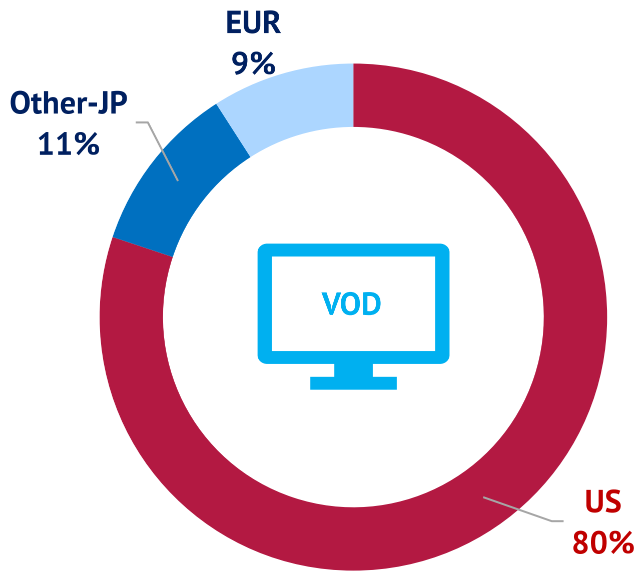
Half of the top 10 TV groups and eight out of the top 10 groups for on-demand services are US groups.

- **Despite an equal number of US-owned TV groups and those with a European parent company in the top 10, the size of US channel portfolios is double that of European ones.**
- **80% of on-demand services in the top 10 groups belong to US global streamers.**

US share among top 10 TV groups | May 2022 - In %



US share among top 10 groups for on-demand services | May 2022 - In %



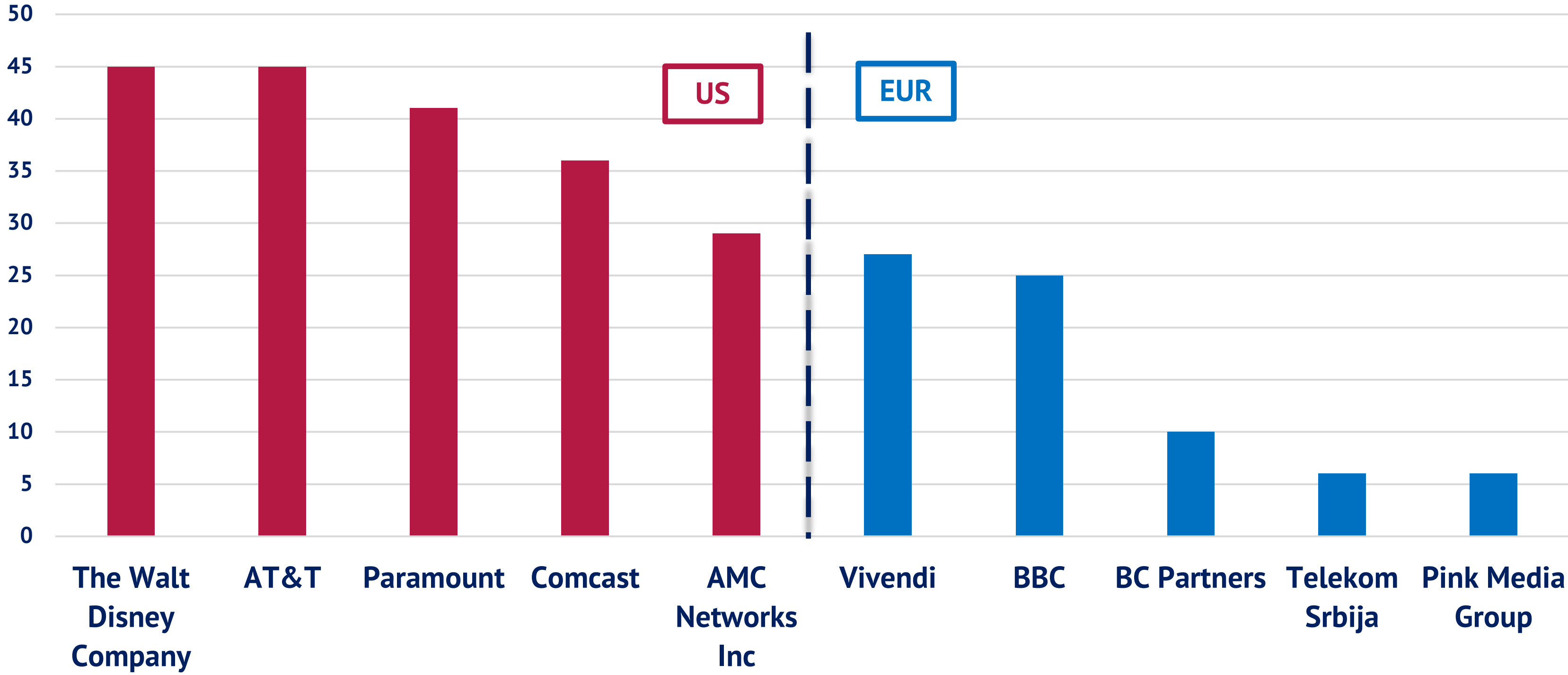
Source: European Audiovisual Observatory / MAVISE

Main players – Operating markets of top 10 TV groups

The Walt Disney Company is present in 45 European markets.

- **Seven out of the top 10 TV groups operate on a pan-European level and a further three operate on a regional level.**
- **While the US groups, Vivendi and the BBC, have a pan-European scope, BC partners, Telekom Srbija and Pink Media Group are regional players focusing on central and Eastern European countries.**

Operating markets of top 10 TV groups in Europe* | May 2022 - In number of countries



Source: European Audiovisual Observatory / MAVISE

Main players – European TV markets served by The Walt Disney Company

The Walt Disney Company (US)

The Walt Disney Company is present in 45 European countries

Disney's main TV brands are
24 Kitchen, Disney Channel, ESPN,
Fox, National Geographic

29 EEA countries
AT, BE, BG, CY, CZ, DE, DK, EE, ES,
FI, FR, GR, HR, HU, IE, IS, IT, LT, LU, LV,
MT, NL, NO, PL, PT, RO, SE, SI, SK

16 European countries*
AD, AL, AM, AZ, BA, BY, CH, GE, MC,
MD, ME, MK, RS, TR, UA, UK

** Incl. microstates.*

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Source: European Audiovisual Observatory / MAVISE / May 2022

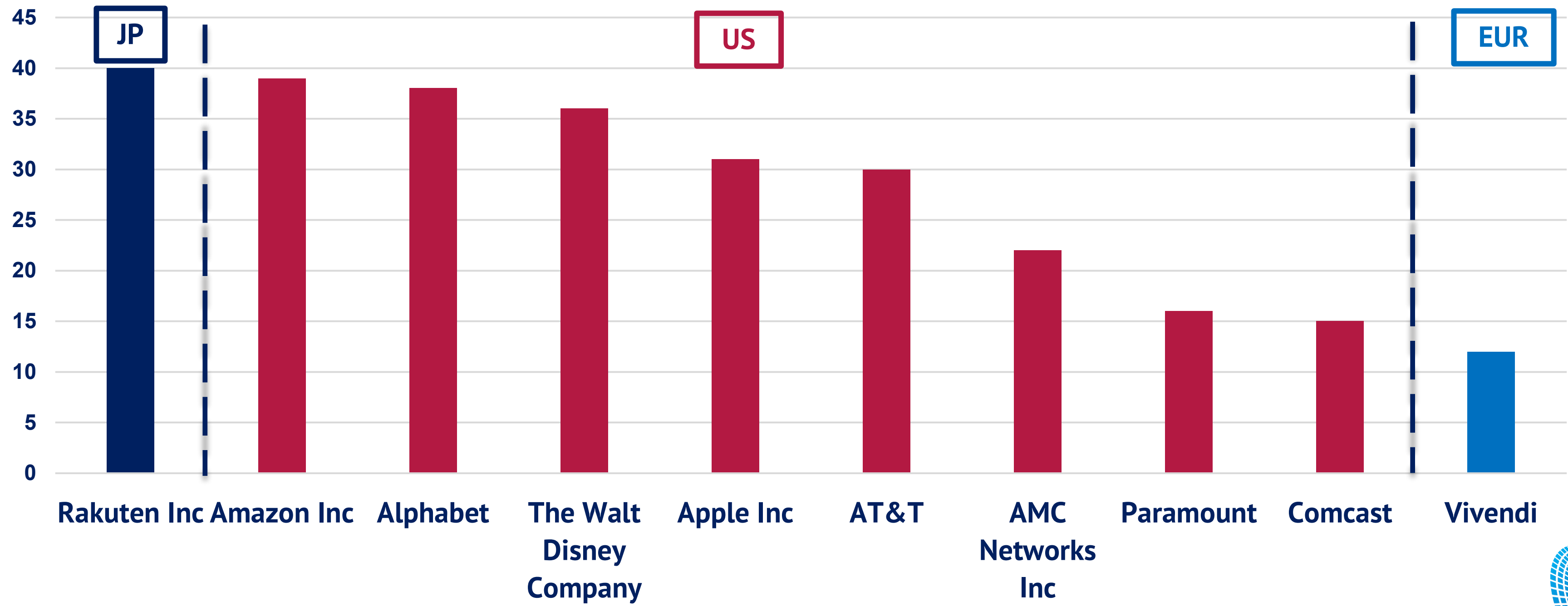
European Audiovisual Observatory

Main players – Operating markets of top 10 groups for on-demand services

Japanese Rakuten is present in 40 European markets.

- **All top 10 groups for on-demand services operate on a pan-European level.**
- **Rakuten together with the US groups has the largest scope of operating markets across Europe.**

Operating markets of top 10 groups for on-demand services in Europe | May 2022 - In number of countries



Source: European Audiovisual Observatory / MAVISE

Rakuten Inc (JP)

Rakuten TV is present in 40 European countries

30 EEA countries

AT, BE, BG, CY, CZ, DE, DK, EE, ES, FI, FR, GR, HR, HU, IE, IS, IT, LI, LT, LU, LV, MT, NL, NO, PL, PT, RO, SE, SI, SK

10 European countries*

AD, AL, BA, CH, MC, ME, MK, RS, SM, UK

** Incl. members of the Council of Europe and microstates.*

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Source: European Audiovisual Observatory / MAVISE / May 2022

European Audiovisual Observatory

Establishment of main players – Case studies

Main players – Countries of establishment of top 10 TV groups

	European Group | Parent company	Owner-ship	No. TV	Countries of establishment*	AVMSD jurisdiction*
1	Warner Bros. Discovery (Europe) | AT&T (US)	Private	360	CZ, DE, ES, FI, FR, IE, IT, NL, NO, PL, TR, UK (12)	CZ, DE, ES, FI, FR, IE, IT, LU, NL, NO, PL
2	Paramount (Europe) | Paramount (US)	Private	203	CH, CZ, DE, ES, FR, IT, NL, SE, TR, UK (10)	CZ, DE, ES, FR, IT, LU, NL, SE
3	Comcast (Europe) | Comcast (US)	Private	172	AT, CH, DE, ES, FR, IT, LU, UK (8)	AT, DE, ES, FR, IT, LU
4	The Walt Disney Company (Europe) | The Walt Disney Company (US)	Private	130	BG, DE, ES, FI, FR, IT, NL, TR, UK (9)	BG, DE, ES, FI, FR, IT, LU, NL
5	Groupe Canal Plus (FR) | Vivendi (FR)	Private	113	ES, FR, LU, NL, PL, TR, UK (7)	ES, FR, LU, NL, PL
6	United Group (CZ) | BC Partners (UK)	Private	99	BA, BG, GR, HR, LU, RS (6)	BG, GR, HR, LU
7	AMC Networks (Europe) | AMC Networks Inc (US)	Private	70	BA, CZ, DE, ES, PT, UK (6)	CZ, DE, ES, PT
8	BBC (UK) | Government of United Kingdom (UK)	Public	70	LU, NL, UK (3)	LU, NL
9	Telekom Srbija (RS) | Government of Serbia	Public	62	HR, LU, ME, RS (4)	HR, LU
10	Pink Media Group (RS) | Pink Media Group (RS)	Private	59	RS (1)	n.a.

**No doubles.*

Source: European Audiovisual Observatory / MAVISE

European Audiovisual Observatory

Main players – Countries of establishment of top 10 groups for on-demand services

	European Group | Parent company	Owner-ship	No. VOD	Countries of establishment*	AVMSD jurisdiction*
1	Warner Bros. Discovery (Europe) | AT&T (US)	Private	149	CZ, DE, FI, FR, NL, PL, SE, TR, UK (9)	CZ, DE, FR, NL, PL, SE
2	Google (Europe) | Alphabet (US)	Private	99	IE, US (2)	n.a.
3	Rakuten Europe (ES) | Rakuten Inc (JP)	Private	76	ES, US (2)	ES
4	The Walt Disney Company (Europe) | The Walt Disney Company (US)	Private	69	CH, ES, FI, FR, NL, TR, UK (7)	ES, FI, FR, NL
5	Groupe Canal Plus (FR) | Vivendi (FR)	Private	64	FR, IT, NL, PL, TR, UK (6)	FR, IT, NL, PL
6	Apple (Europe) | Apple Inc (US)	Private	60	IE, TR (2)	n.a.
7	Comcast (Europe) | Comcast (US)	Private	54	AT, DE, FR, IT, US, UK (6)	AT, DE, FR
8	Amazon Prime Video (Europe) | Amazon Inc (US)	Private	46	AL, AM, BA, CH, DE, GE, ME, MK, RS, TR, UK (11)	DE
9	AMC Networks (Europe) | AMC Networks Inc (US)	Private	46	CZ, ES, PT, US, UK (5)	CZ, ES, PT
10	Paramount (Europe) | Paramount (US)	Private	41	CH, DE, FR, HU, PL, SE, US, UK (8)	DE, FR, SE

** No doubles.*

Source: European Audiovisual Observatory / MAVISE

Main players – Case study #1 : Centralised strategy

Netflix (HQ in US)*

Netflix is based in a single European country, the Netherlands, and serves 40 European on-demand markets

1 country of establishment
The Netherlands

30 EEA markets
AT, BE, BG, CY, CZ, DE, DK, EE, ES, FI, FR, GR, HR, HU, IE, IS, IT, LI, LT, LU, LV MT, NL, NO, PL, PT, RO, SE, SI, SK

10 European markets
AL, AM, BA, CH, GE, ME, MK, RS, TR, UK

** Netflix ranks 11th in the top 50 groups for on-demand services.*

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Source: European Audiovisual Observatory / MAVISE / May 2022

European Audiovisual Observatory

BBC (HQ in UK)

The BBC is based in a limited number of countries, from where it serves 25 European TV markets

3 countries of establishment
The UK (HQ), Luxembourg, the Netherlands

17 EEA markets
BE, CY, CZ, DK, FI, GR, HR, HU, IE, MT
NL, NO, PL, RO, SE, SI, SK

8 European markets
AZ, BA, GE, ME, MK, RS, TR, UK

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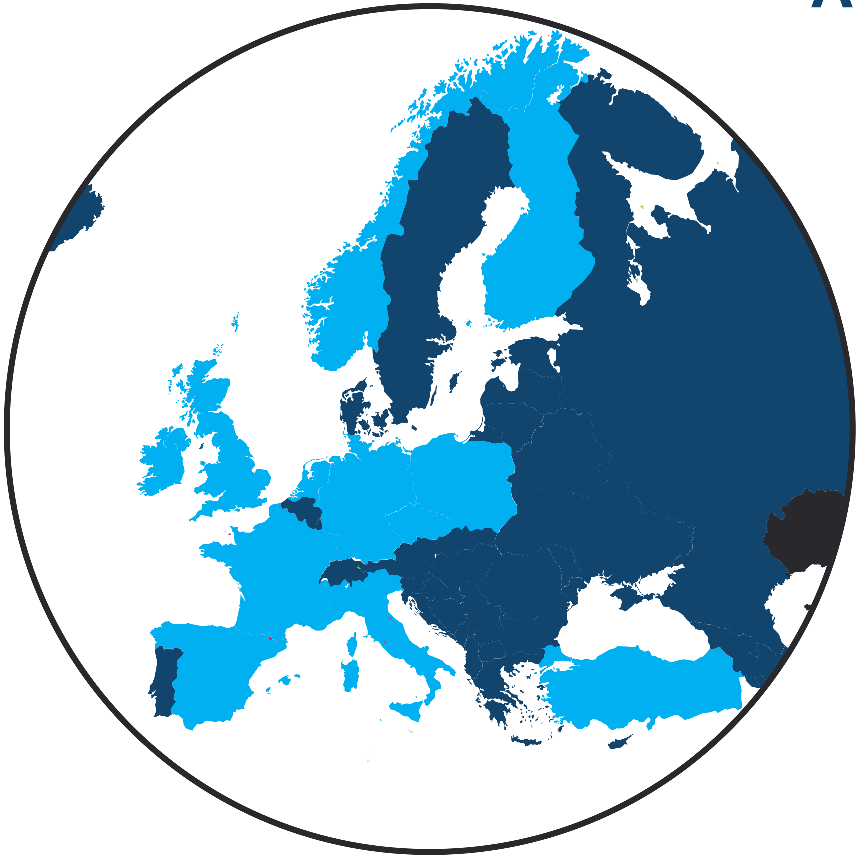
Source: European Audiovisual Observatory / MAVISE / May 2022



AT&T (HQ in US)

AT&T is based in several countries, from where it serves 45 European TV markets

12 countries of establishment
CZ, DE, ES, FI, FR, IE, IT, NL, NO, PL, TR, UK

28 EEA markets
AT, BE, BG, CY, CZ, DE, DK, EE, ES, FI, FR, GR, HR, HU, IE, IS, IT, LI, LT, LU, LV, NL, NO, PL, PT, RO, SE, SI, SK

17 European markets*
AL, AM, AZ, BA, BY, CH, GE, MC, MD, ME, MK, RS, RU, SM, TR, UA, UK

** Incl. microstates.*

Source: European Audiovisual Observatory / MAVISE / May 2022

European Audiovisual Observatory

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