Audiovisual media services in Europe - 2023 edition

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European Audiovisual Observatory

COUNCIL OF EUROPE
CONSEIL DE L'EUROPE

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Introduction

Audiovisual media services are the gateway to bring film, entertainment, sports and news content to the homes of millions of Europeans. The audiovisual works accessible via television channels, on-demand services and video-sharing platforms are not only economic but cultural goods mirroring and shaping European societies.[1] Mapping the supply of audiovisual services, their programming, coverage and ownership is not only key to sizing and comprehending the European audiovisual sector. It is also crucial to understanding who is shaping the market and how.

This publication offers insights into the European audiovisual sector from two perspectives. The first provides **The big picture,** by focusing on the supply of television channels, on-demand services and video-sharing platforms available in and originating from the European markets. Specifically, this includes information on local TV, private and public TV, US-owned channels, channels on DTT networks, and services targeting other markets. With regards to non-linear audiovisual services special attention is paid to SVOD and TVOD, private and public as well as on-demand services targeting other 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, their main brands and operating markets. Further, the report includes three case studies shedding some light onto the different strategies of main players with regards to where they are based and which markets they serve.

[1] European Commission Cinema Communication https://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:C:2013:332:0001:0011:EN:PDF

Scope and methodology

MAVISE database: This publication is based on the analysis of December 2022 figures from the MAVISE database. MAVISE is a database on audiovisual media services, video sharing platforms and their jurisdiction in Europe. The MAVISE database, managed by the European Audiovisual Observatory, is supported by the CREATIVE EUROPE programme of the European Union. For more information, please visit http://mavise.obs.coe.int/

European MAVISE countries of availability: 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 (including microstates Andorra, Gibraltar, Greenland, Monaco, San Marino and Vatican City).

Audiovisual media services available in Europe: Figures for audiovisual media services available in Europe are based on MAVISE data comprising a) all AV linear and non-linear services and video-sharing platforms included in the registries of the audiovisual regulatory authorities in the territories covered by the MAVISE database and b) other AV services relevant from a market perspective.

Audiovisual media services serving domestic markets: AV services where the country of establishment and operational scope of a service provider are identical. In cases of several competent authorities, the first country of establishment is selected.

Audiovisual media services targeting non-domestic markets: AV services registered or established in a country while available only beyond its borders in another country covered by MAVISE.

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Scope and methodology

Pan-European services: Audiovisual media services registered or established in a country and targeting at pan-European level.

On-demand audiovisual media services: For multi-country SVOD and TVOD services, one catalogue is counted as one service.

Terrestrial television services: In case of multiple types of registrations for the exact same service, MAVISE always uses 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.

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 sometimes neighboring countries. A national player is a group which operates most of its services in the domestic market.

Parent company, country and region: Highest company in ownership tree of a service. The country of establishment of the parent company. The geographical region of the country of establishment of the parent company.

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- 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 12 664 audiovisual media services which are available in wider Europe (Dec. 2022).

- Around three quarters of these are linear services (9 349 TV channels) and one quarter are non-linear services (3 315 VOD services including AVOD, catch-up TV and video-sharing platforms). A substantial part of on-demand services are SVOD (28%) and TVOD (12%) and 43% of TV channels in Europe are regional and local TV services. Most European countries have TV channels serving local and regional audiences with mainly generalist programming.

- 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 (55%) whilst 45% of TV channels provide generalist programming. In contrast, three quarters of TVOD (73%) and almost half of all SVOD services (46%) in Europe offer film and TV fiction programming. 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, IPTV, 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.

Executive summary – I. The big picture

- 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 intra-European supply movements. The share of linear services available in Europe primarily serving non-domestic markets (9%) has dramatically decreased since Brexit. The figure is higher for on-demand services (18%).

- 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 Netherlands, the United Kingdom and Germany. Most non-domestic TV channels and almost all non-domestic on-demand services are in private ownership.

- Fewer in numbers but omnipresent, around 8% 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, generalist and religious channels, pan-European satellite channels for pay tend to be services with adult, entertainment and music content.

- Overall, US groups play a prominent role in the European AV sector. Around one in five (18%) of all private TV channels (excluding local TV) are US-owned and over one third of all SVOD (39%) and TVOD (33%) services in Europe belong to a US company. US-owned TV channels are almost exclusively thematic channels with a strong presence in documentary and children's programming. Around half of all children's TV channels in Europe are US-owned (48%) and so are 59% of entertainment subscription video-on-demand services.

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Executive summary – II. Main players

- Non-European players have taken a strong foothold in the European AV market. One in five 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 more than half of the top 50 TV groups and three out of four of the top on-demand service groups in Europe.

- Most non-European parent companies of AV services in Europe are US players. 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 44 European TV markets. Netflix and Amazon operate in 40 and 39 European on-demand markets respectively. US players have by far the largest scope of operating markets across Europe.

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

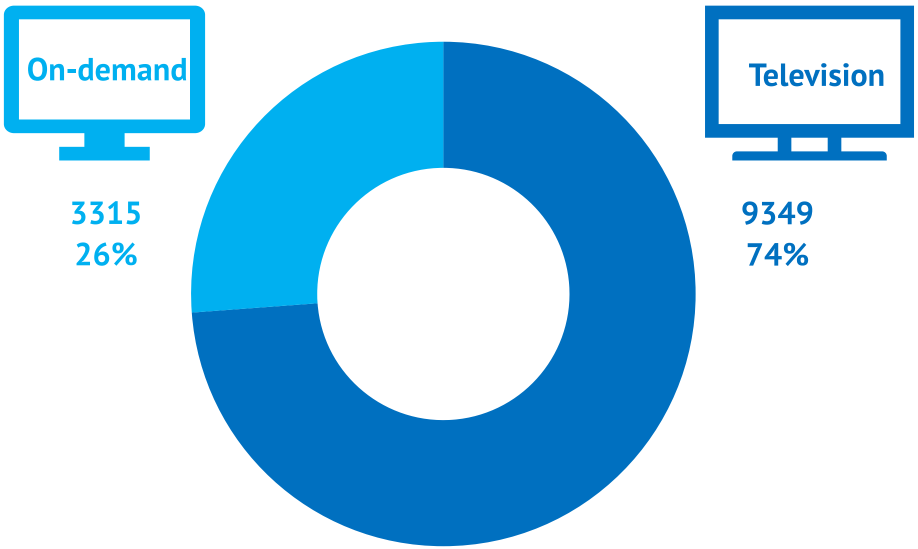
Part I. The big picture – AV services

The big picture – AV services

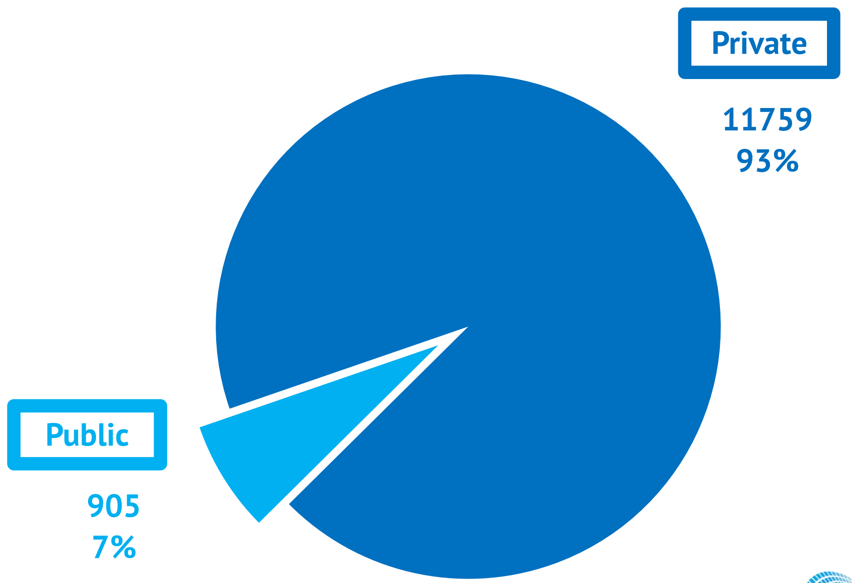
Overall, there are 12 664 audiovisual media services available in wider Europe (Dec. 2022).

- **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 services available in Europe | Dec. 2022 - In number of services and %



Ownership of audiovisual media services available in Europe | Dec. 2022 - In number of services and %



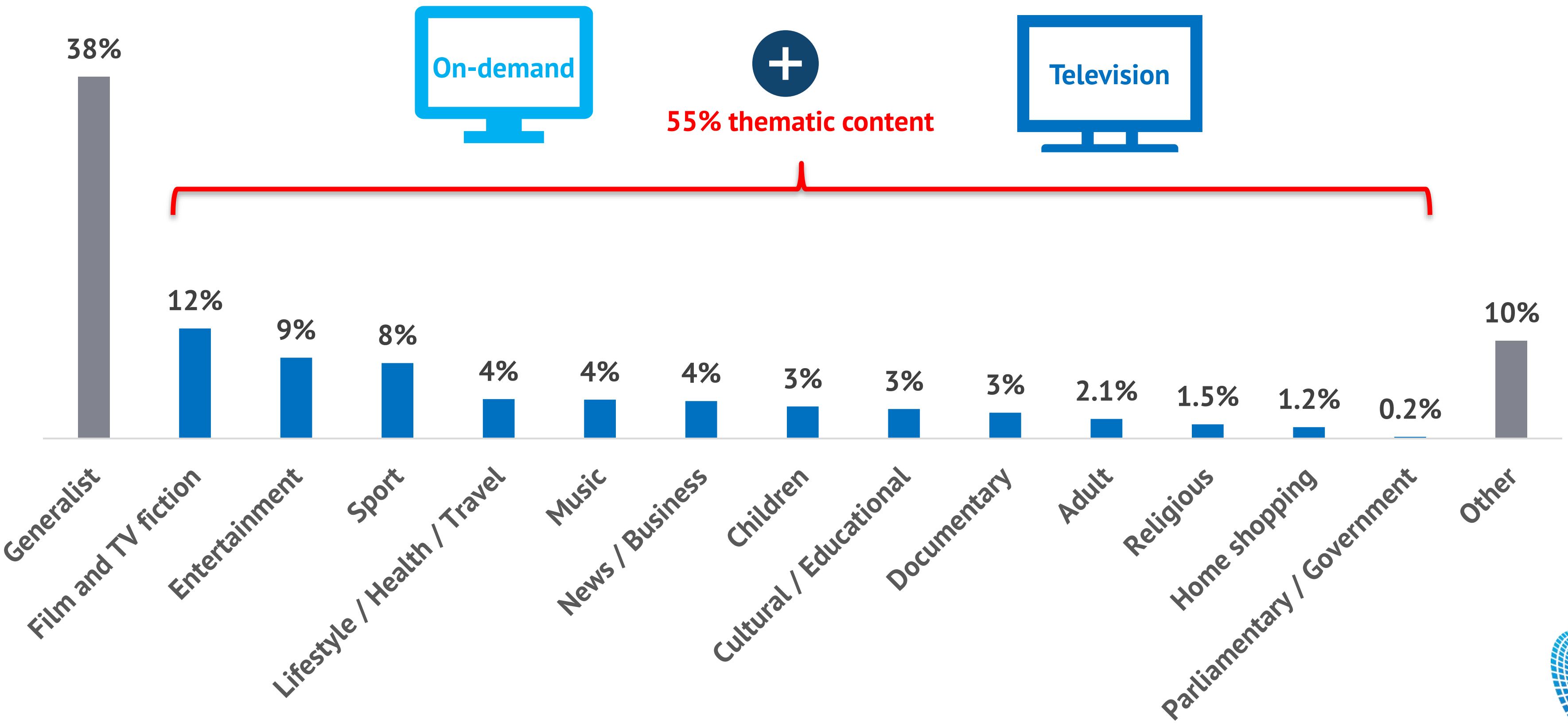
Source: European Audiovisual Observatory / MAVISE

The big picture – AV services content

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

- **At least 55% of AV services in Europe offer thematic programming.**
- **Among the most popular programming types are film and TV fiction, entertainment and sport.**

Percentage of audiovisual media services available in Europe offering the following categories of content | Dec. 2022



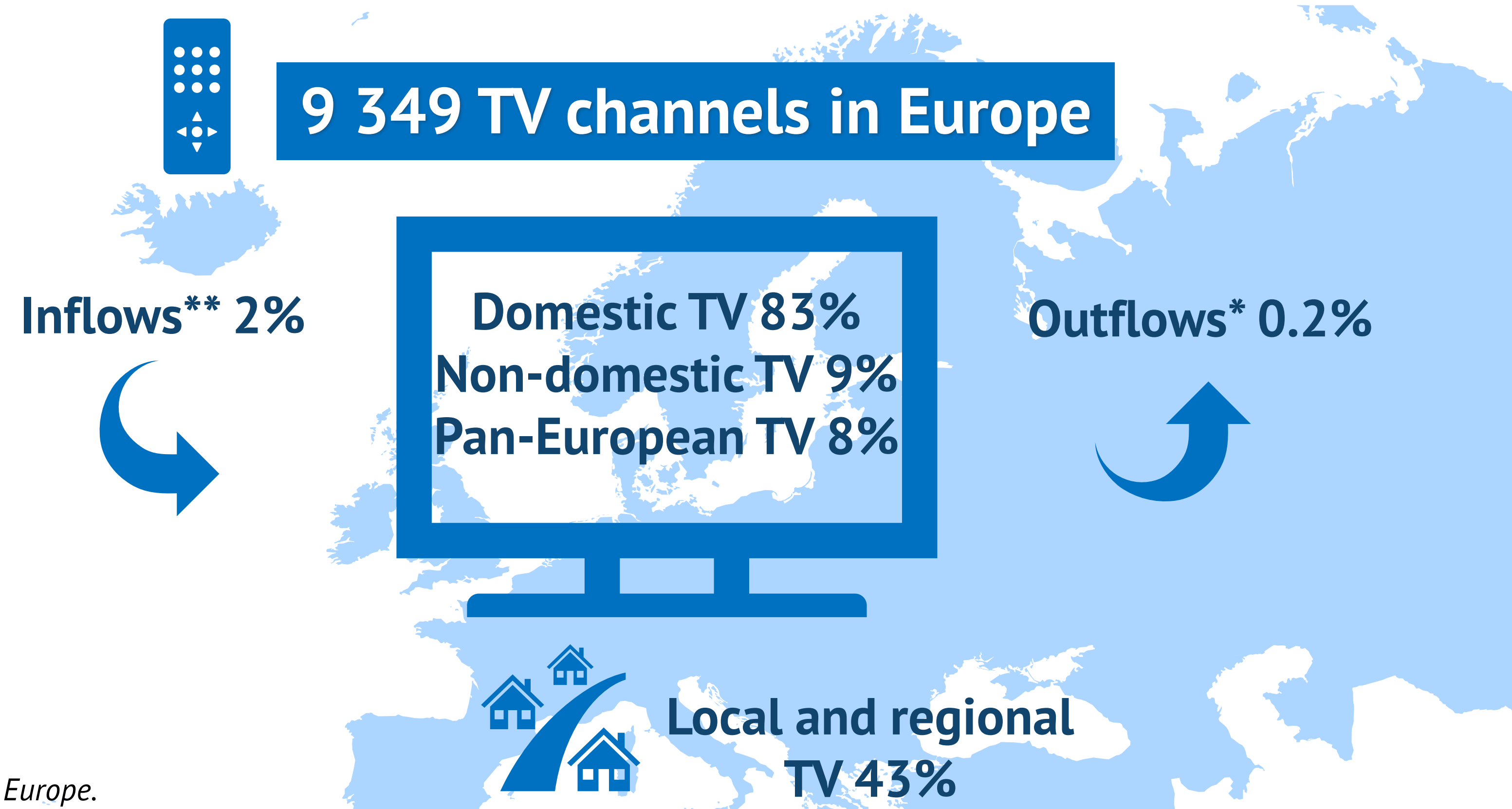
Source: European Audiovisual Observatory / MAVISE

The big picture – TV channels

The big picture – TV channels in Europe

Most TV channels in Europe serve domestic markets (83%).

- **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).**



* *Exports outside Europe.*

** *Targeting Europe from outside; mainly included in Pan-European channels.*

Source: European Audiovisual Observatory / MAVISE / Dec. 2022

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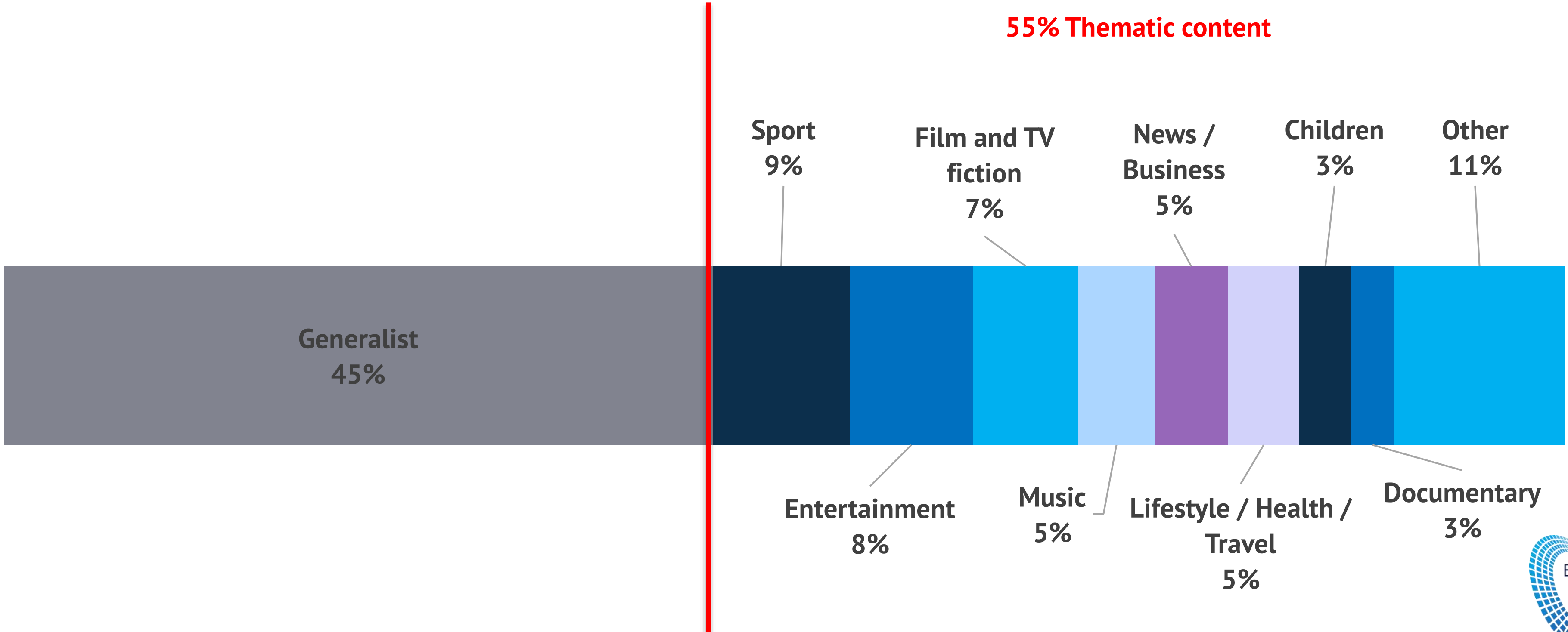
The big picture – TV channel content

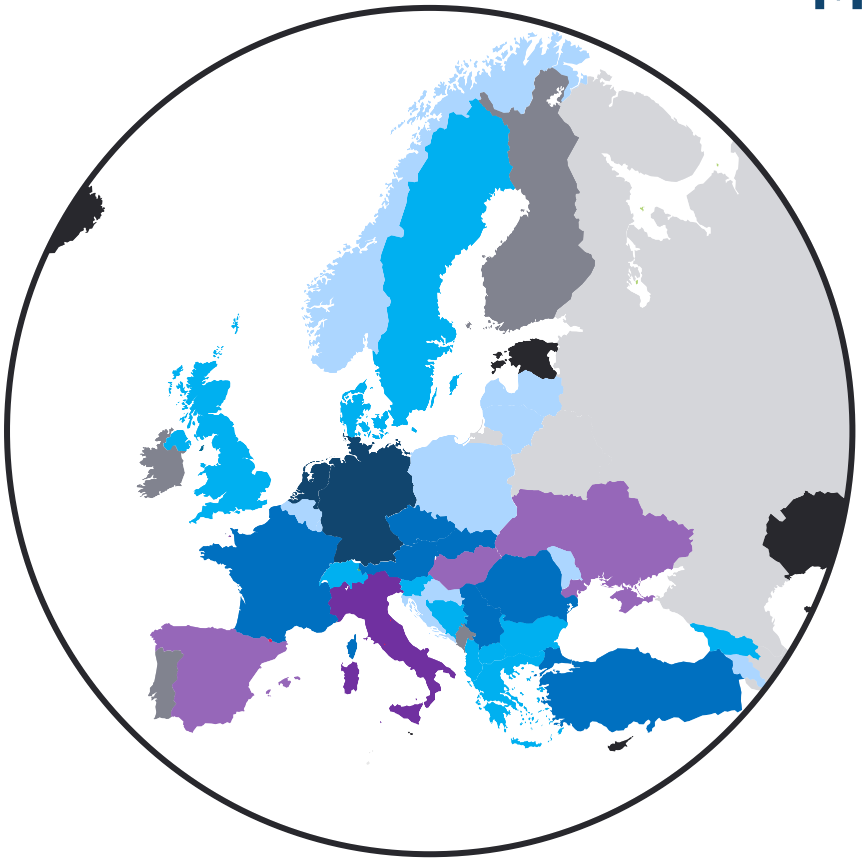
TV programming in Europe is largely defined by thematic fragmentation.

- **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.**

Percentage of TV channels available in Europe offering the following categories of content | Dec. 2022



Source: European Audiovisual Observatory / MAVISE



Map of local and regional TV

The great majority of European countries have local or regional TV channels.

- > 600 : IT
- > 300 : ES, HU, UA
- > 200 : DE, NL
- > 100 : AT, CZ, FR, RO, RS, SK, TR
- 30-50 : AL, BA, BG, CH, DK, GE, GR, MK, SE, SI, UK
- 20-30 : AM, BE, HR, LT, LU, LV, MD, NO, PL
- >10 : FI, IE, LI, ME, PT
- None : EE, CY, IS, MT

Map of Europe and flag icons © Copyright Showeet.com
Source: European Audiovisual Observatory / MAVISE / Dec. 2022

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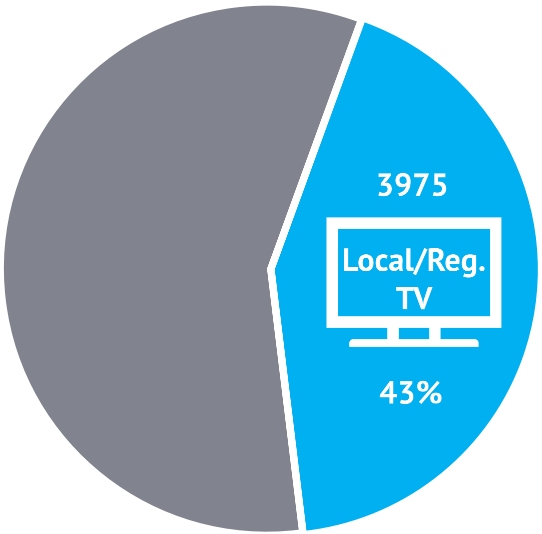
The big picture – Local and regional TV channels

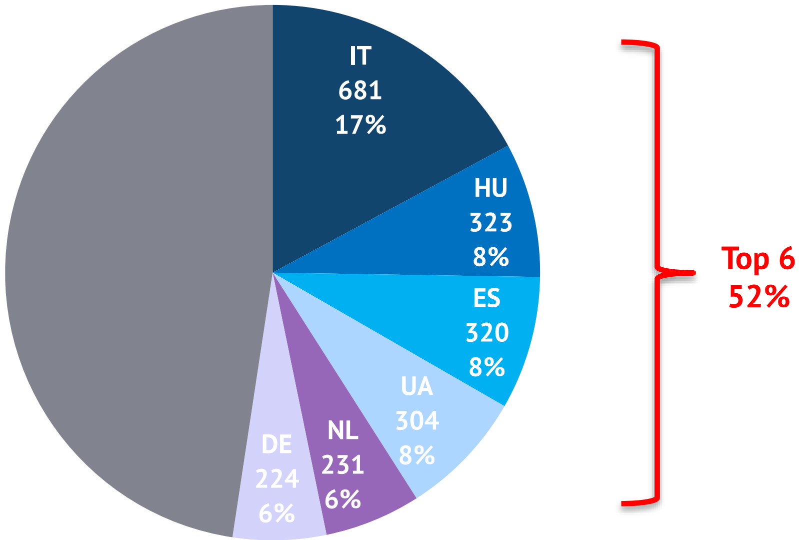
The European television sector is characterised by a significant share of local and regional TV services.

- **Local and regional TV makes up 43% of the overall number of TV channels in Europe.**
- **Six countries account for more than half of all local TV channels.**
- **Around 71% of the Italian AV market is local channels - the equivalent of 17% of all local channels in Europe.**

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



Breakdown of local and regional TV by country | Dec. 2022 - In number of services and %



Source: European Audiovisual Observatory / MAVISE

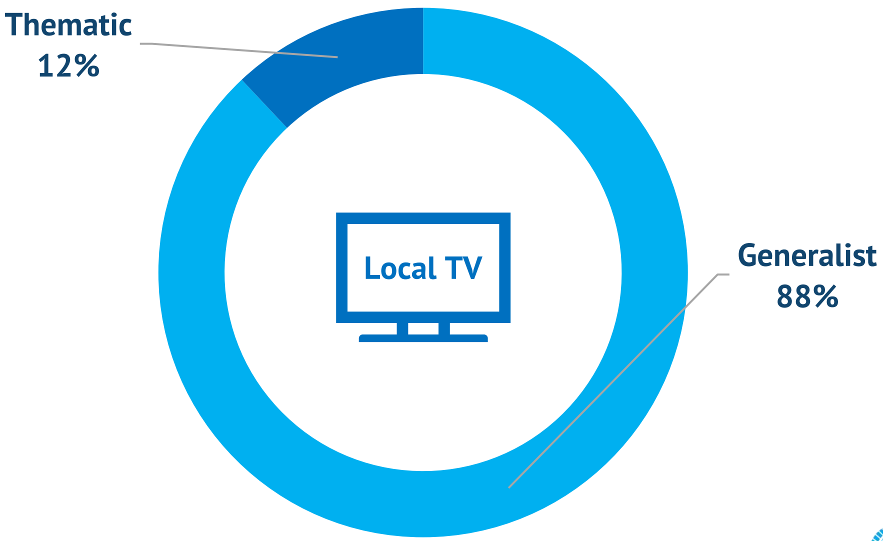
The big picture – Local and regional TV channels

The great majority of local and regional TV channels in Europe have generalist programming.

- **Nine out of ten local and regional TV channels provide generalist programming.**
- **Thematic programming on local and regional level is the exception since channels aim to appeal to the largest possible audience in their respective regions.**

Percentage of all TV channels offering the following categories of content | Dec. 2022

Percentage of local and regional TV channels offering the following categories of content | Dec. 2022



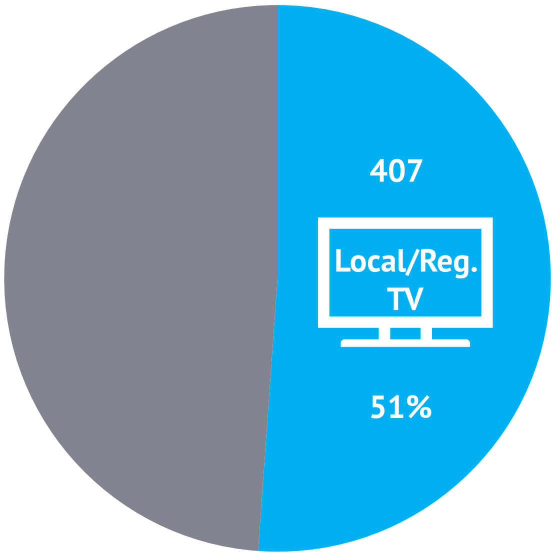
Source: European Audiovisual Observatory / MAVISE

The big picture – Public local and regional TV channels

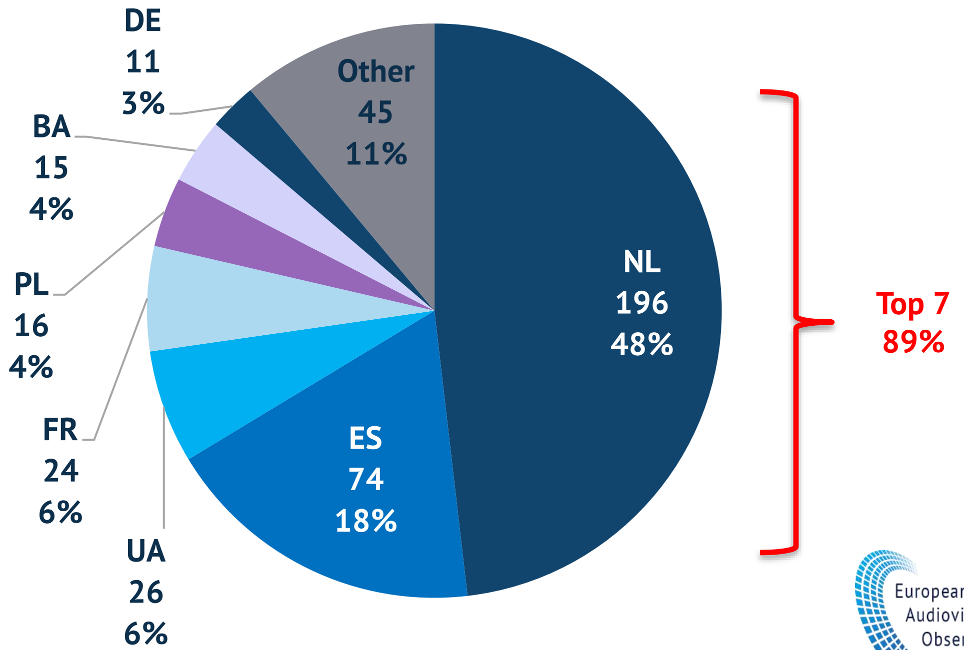
Half of all public service TV channels are local and regional services.

- **Public local and regional channels are most prominent in the Netherlands and Spain, accounting for two thirds of all public local and regional channels in Europe.**
- **Availability of public channels serving local and regional audiences differs widely across Europe, ranging from close to 200 in the Netherlands to fewer than 10 in 12 European countries.**

Share of local and regional channels among public TV | Dec. 2022 - In number of services and %



Breakdown of public local and regional TV by country | Dec. 2022 - In number of services and %



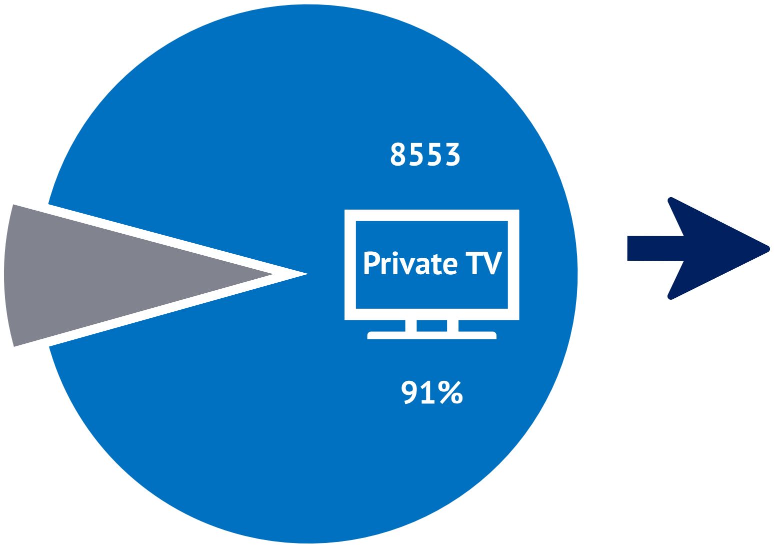
Source: European Audiovisual Observatory / MAVISE

The big picture – Private TV channels

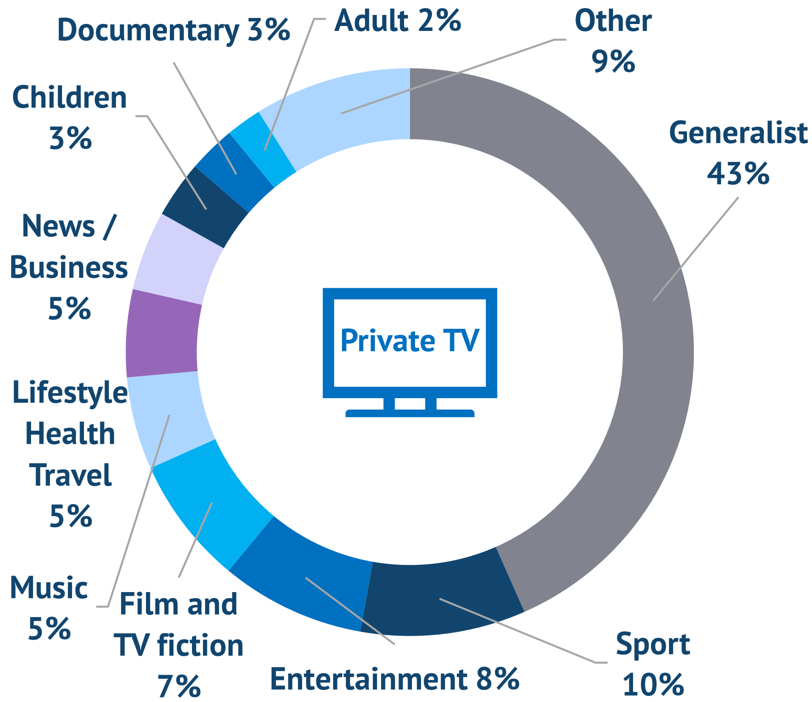
The great majority of TV channels in Europe are private.

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

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



Percentage of private TV channels offering the following categories of content | Dec. 2022



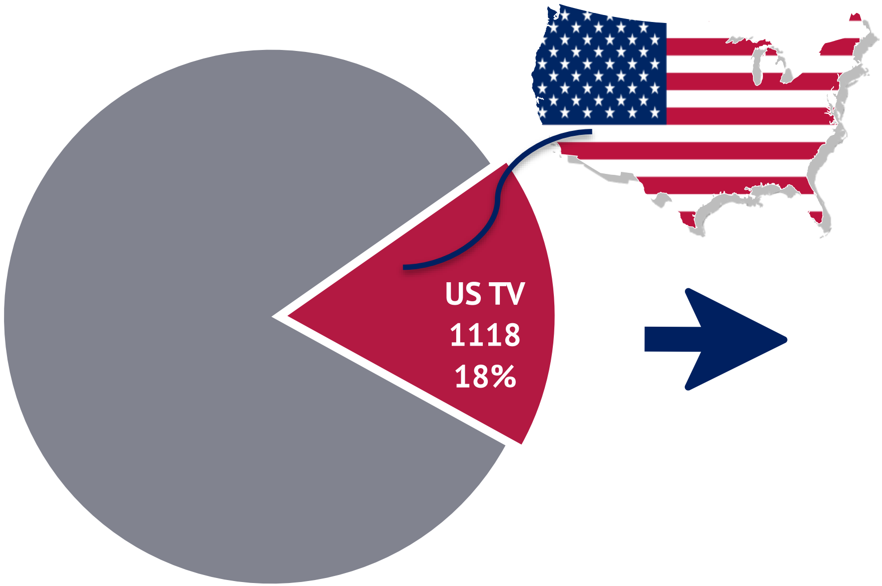
Source: European Audiovisual Observatory / MAVISE

The big picture – US share among private TV channels

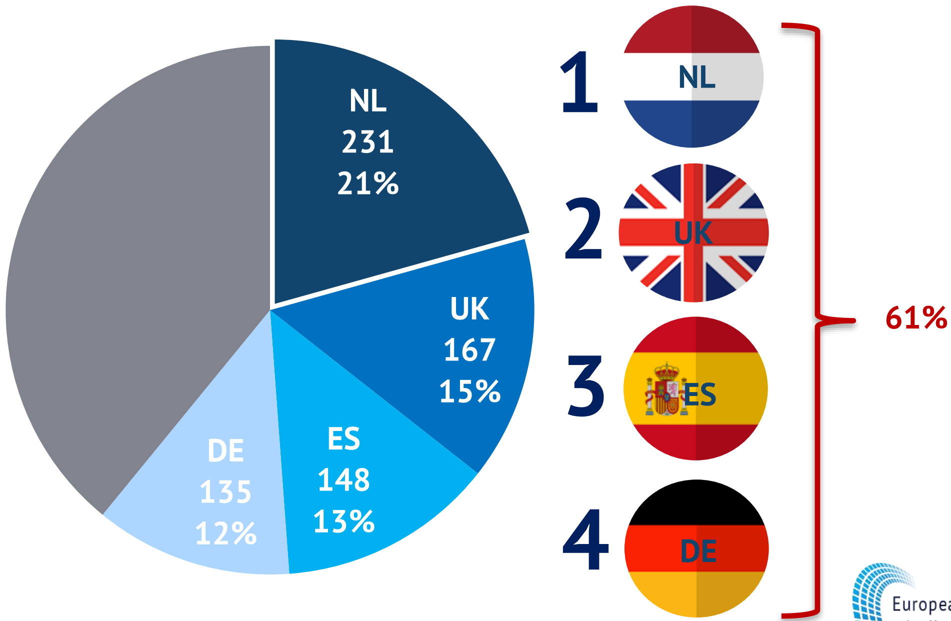
Around one in five private TV channels in Europe is US-owned.

- 61% of all private US-owned TV channels are based in four countries.
- Two thirds of US channels are based in the country where they offer their services. One third of US channels is active in several countries or operates on pan-European level.

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



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



** Incl. joint ventures with US participation; excl. local TV channels*

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Source: European Audiovisual Observatory / MAVISE

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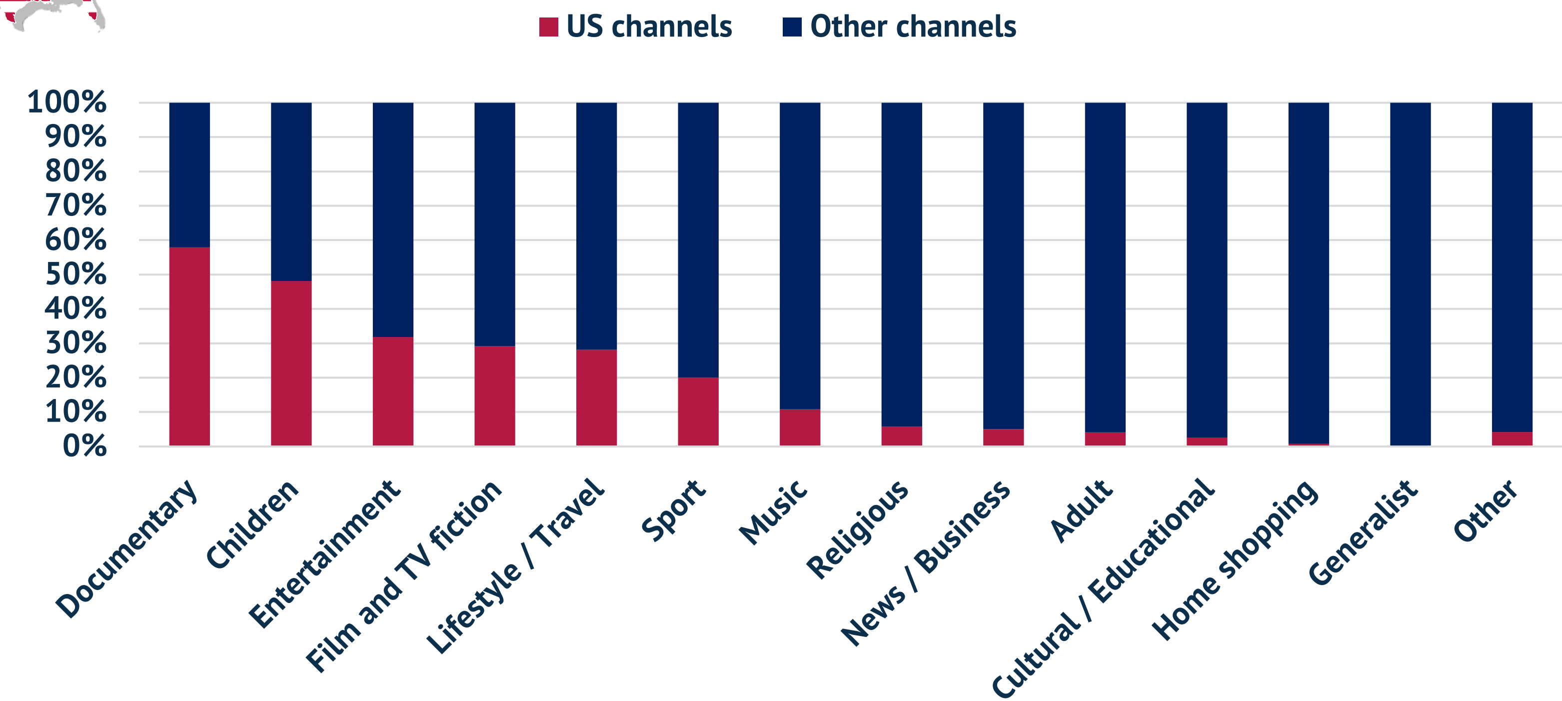
Around half of all children's TV channels in Europe are US-owned.

- **US TV channels are almost exclusively thematic channels.**
- **They are particularly strong in documentary, children, entertainment, film and TV fiction, lifestyle and sports programming.**

Share of US-owned TV channels per category of content | Dec. 2022 - In %

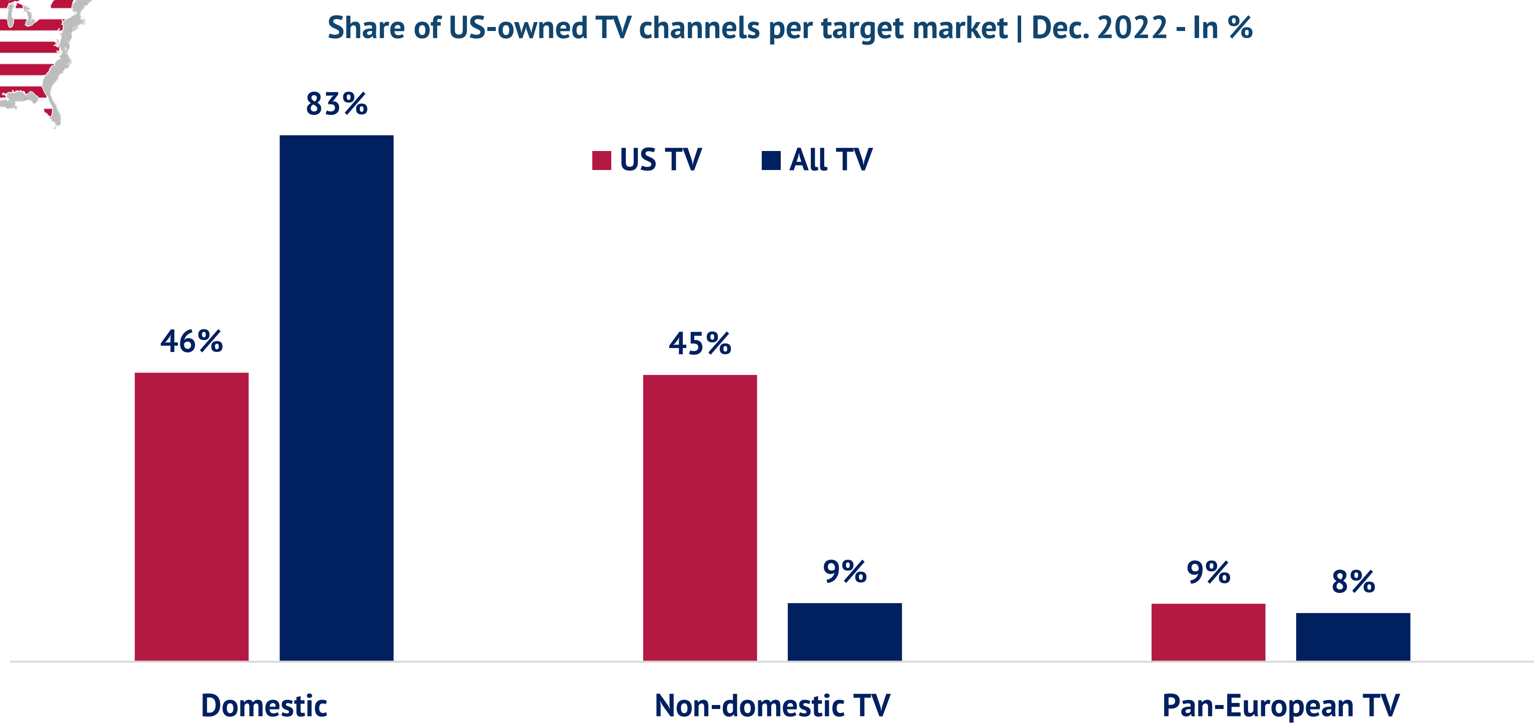


Source: European Audiovisual Observatory / MAVISE

The big picture – Markets targeted by US channels

US networks are overrepresented among non-domestic TV channels.

- **US channels serve markets to an equal degree as non-domestic services or from their country of establishment. US-owned TV services operating on pan-European level make up just 9%.**
- **US channels are mainly distributed via cable, satellite and IPTV. Availability on DTT networks is the exception (7%).**



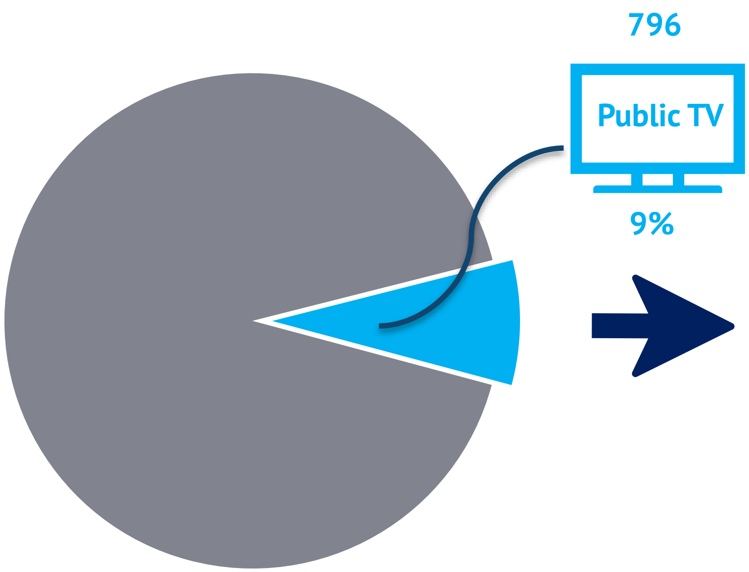
Source: European Audiovisual Observatory / MAVISE

The big picture – Public TV channels

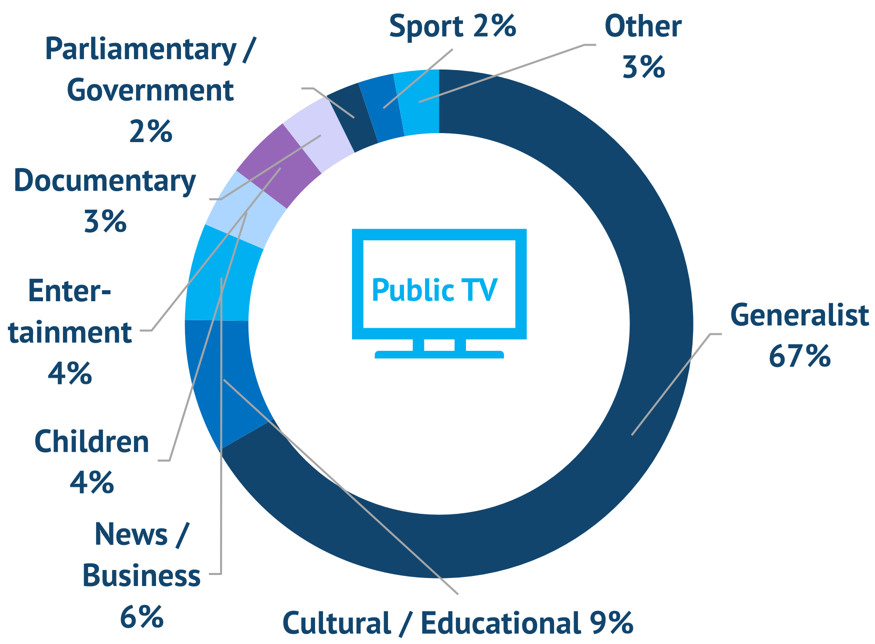
Around one in 10 TV channels in Europe is public.

- Three out of four 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 | Dec. 2022 - In number of services and %



Percentage of public TV channels offering the following categories of content | Dec. 2022



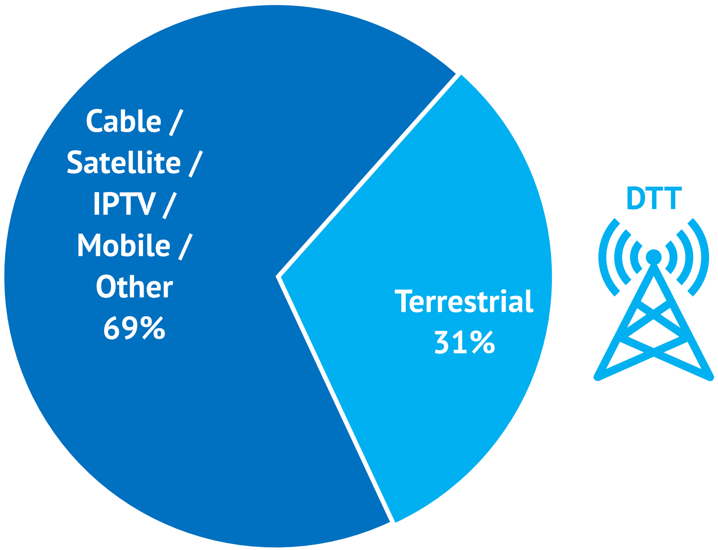
Source: European Audiovisual Observatory / MAVISE

The big picture – TV networks

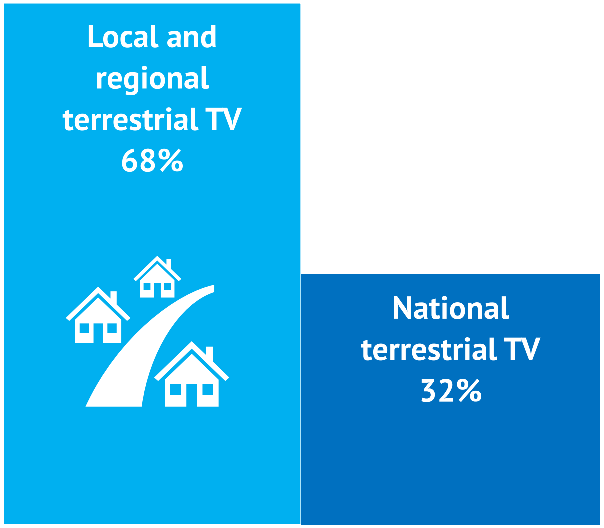
Around one in three TV channels in Europe is available on digital terrestrial networks.

➢ **31% 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 68% of local and regional TV channels are available on DTT networks, compared to 32% of national TV services.**

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



Share of local/regional and national TV on terrestrial networks | Dec. 2022 - In %



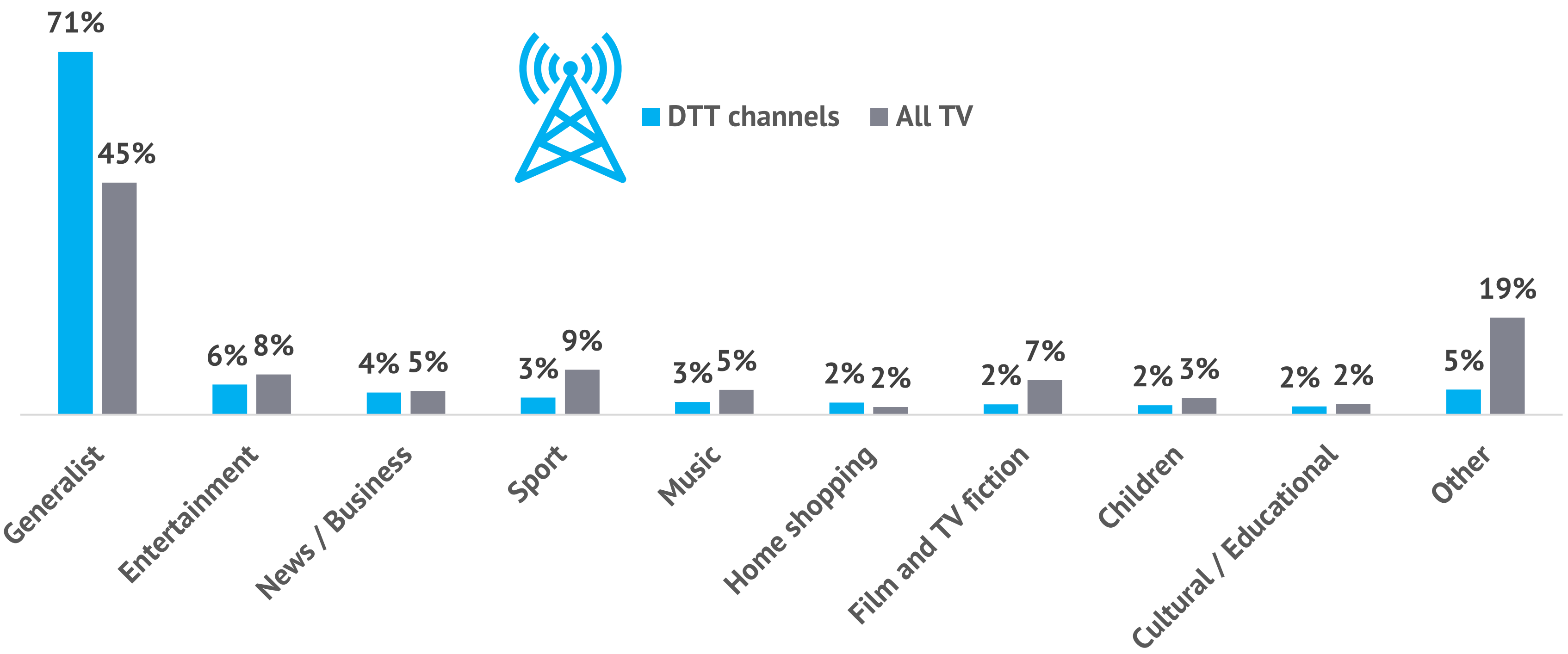
Source: European Audiovisual Observatory / MAVISE

The big picture – DTT channel programming

Three out of four 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 thematic.**

Percentage of TV channels on DTT networks offering the following categories of content | Dec. 2022



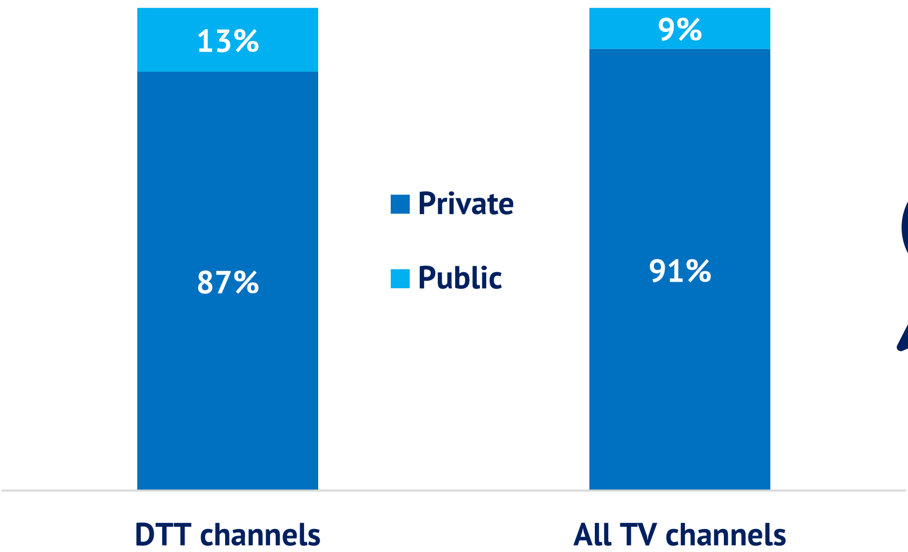
Source: European Audiovisual Observatory / MAVISE

The big picture – DTT channel ownership

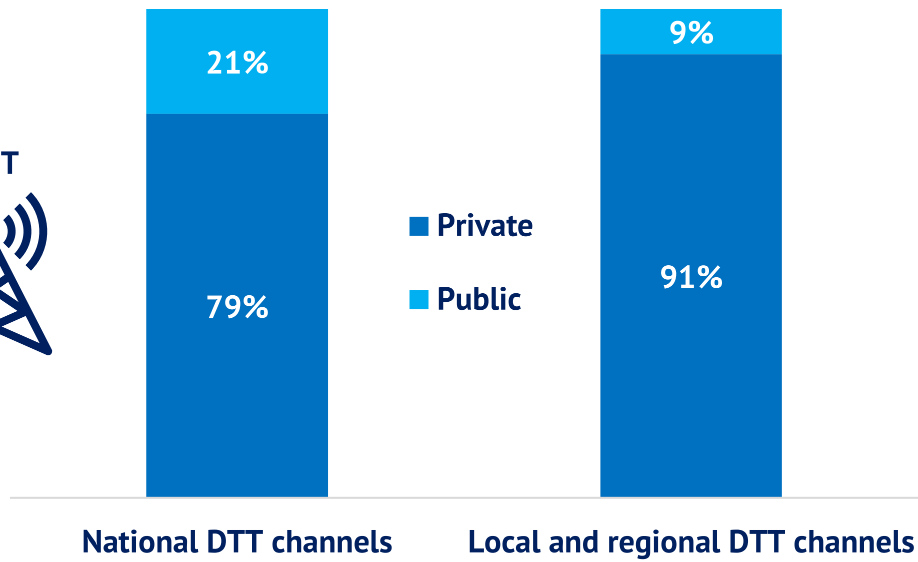
Around one in five TV channels available on DTT networks is in public ownership.

- **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 and regional TV.**

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



Comparison of national vs. local and regional TV channels on DTT by ownership | Dec. 2022 - In %



Source: European Audiovisual Observatory / MAVISE

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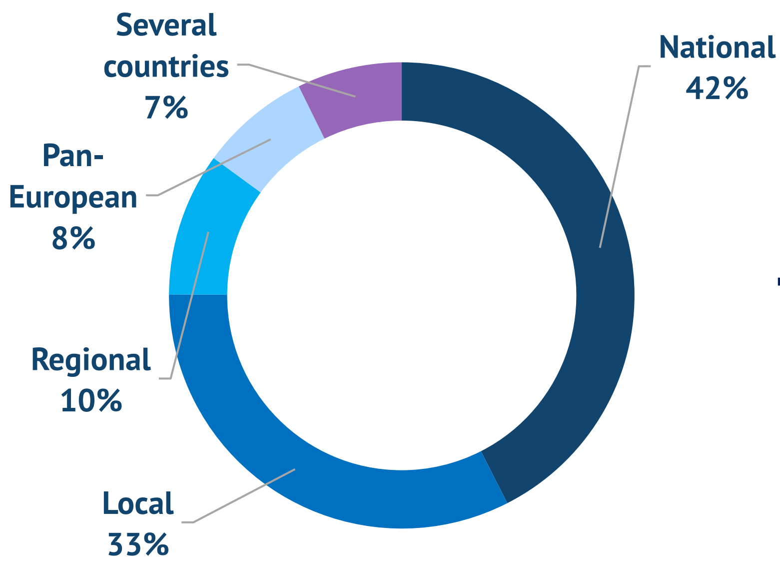
The big picture – TV channel coverage

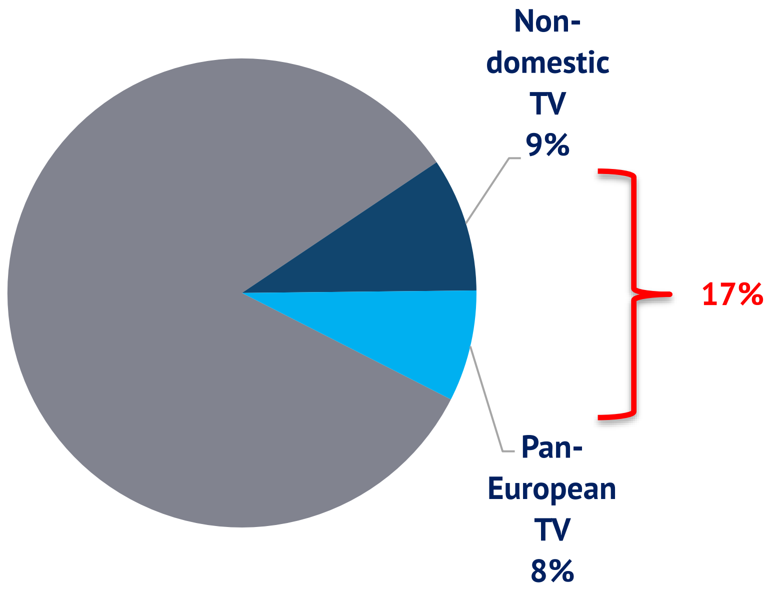
The majority (83%) of TV channels in Europe primarily serves domestic markets.

- **There are just as many TV channels with local and regional as those with national coverage.**
- **Around 9% of all TV channels in Europe only serve non-domestic markets and another 8% are pan-European TV services.**

Breakdown of TV channels by coverage | Dec. 2022 – In %



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



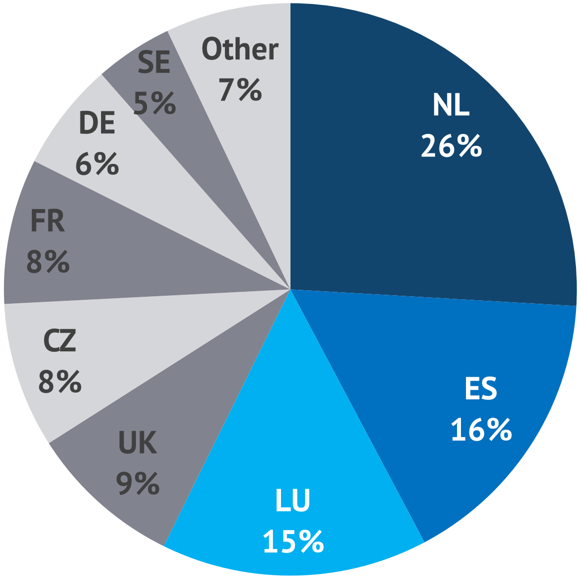
* *Non-domestic TV channels are those that serve a market other than their country of establishment.*
Source: European Audiovisual Observatory / MAVISE

The big picture – Non-domestic TV channel hubs

There are 864 TV channels in Europe targeting non-domestic markets only.

- **Three countries account for 57% of non-domestic TV channels. They include the Netherlands, Spain and Luxembourg.**
- **Luxembourg is a significant hub for European non-domestic TV channel networks.**

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



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

1 NL

US: Disney (Disney Channel), Paramount Global (Nick Junior, Nick Toons, Nickelodeon), Warner Bros. Discovery (Animal Planet, Discovery Channel, Travel Channel)
EUR: Antenna Group (AXN, Viasat), BBC (BBC Brit, BBC Earth)

2 ES

US: AMC Networks (AMC TV, CBS Reality), Comcast (E! Entertainment, Syfy), Disney (Disney Junior, FOX, NGC, Wild)
EUR: Vivendi (Filmbox)

3 LU

EUR: Bertelsmann (RTL), BC Partners (Sport Klub, Nova, Vavoom), Vivendi (Canal+)
US: Comcast (Sky)

Source: European Audiovisual Observatory / MAVISE

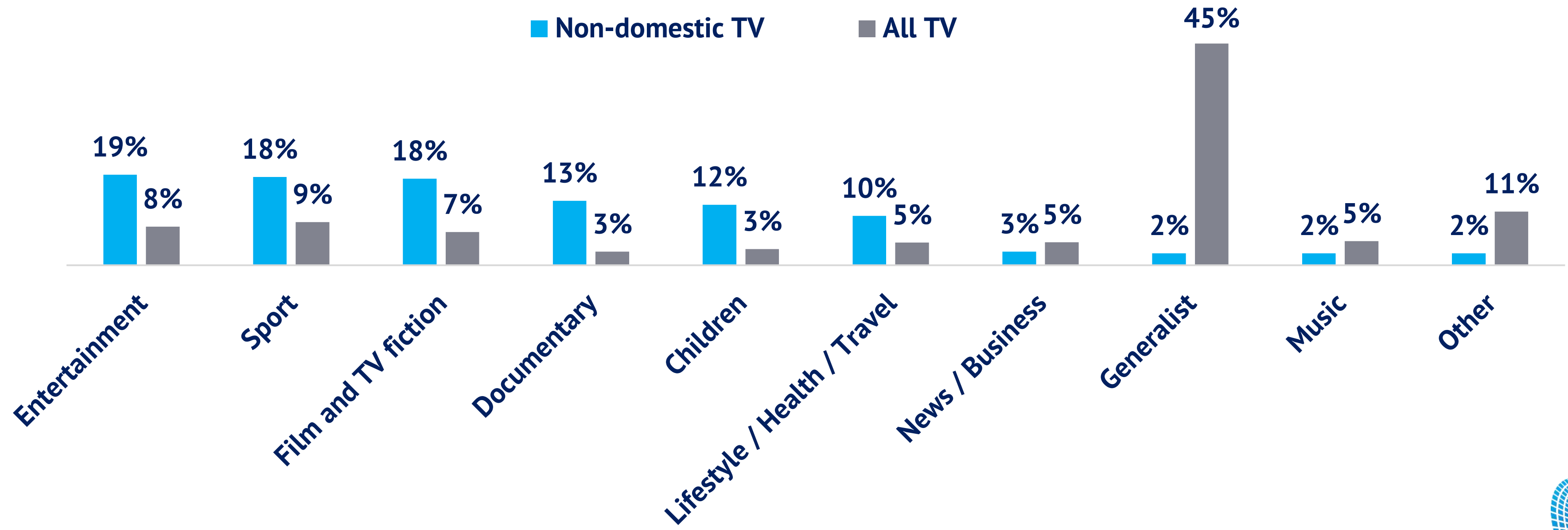
European Audiovisual Observatory

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 entertainment, sport, film and TV fiction content.**
- **Present in non-domestic TV are US networks such as Warner Bros. Discovery, Paramount or Disney, and European networks like the United Group (BC Partners, UK) or RTL (Bertelsmann, DE).**

Percentage of non-domestic TV channels offering the following categories of content | Dec. 2022

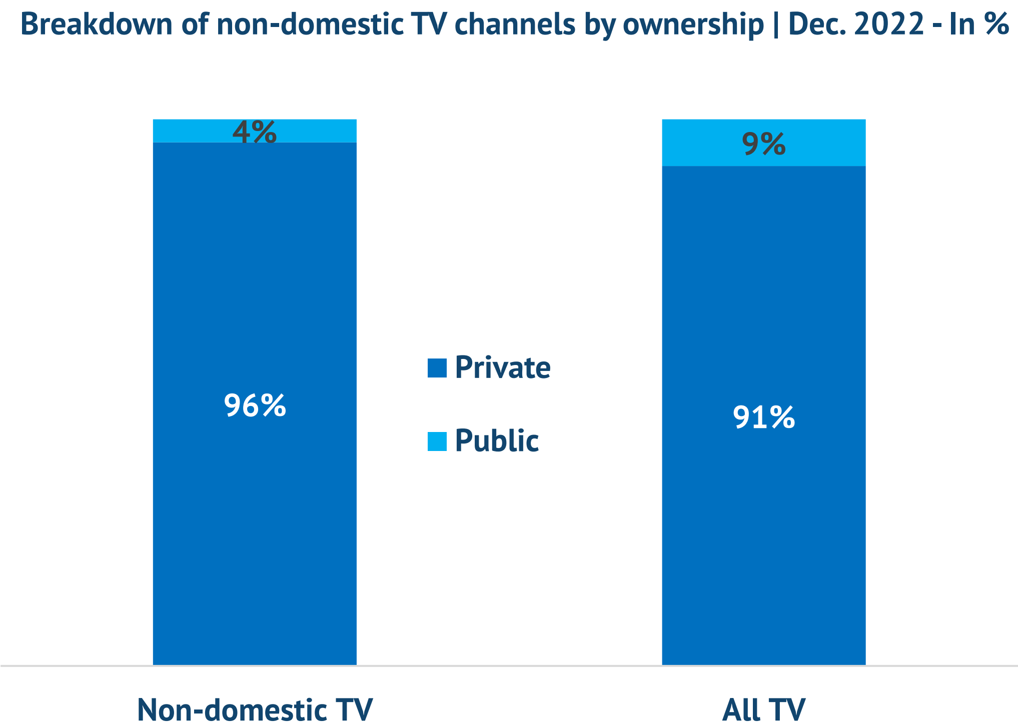


Source: European Audiovisual Observatory / MAVISE

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.**



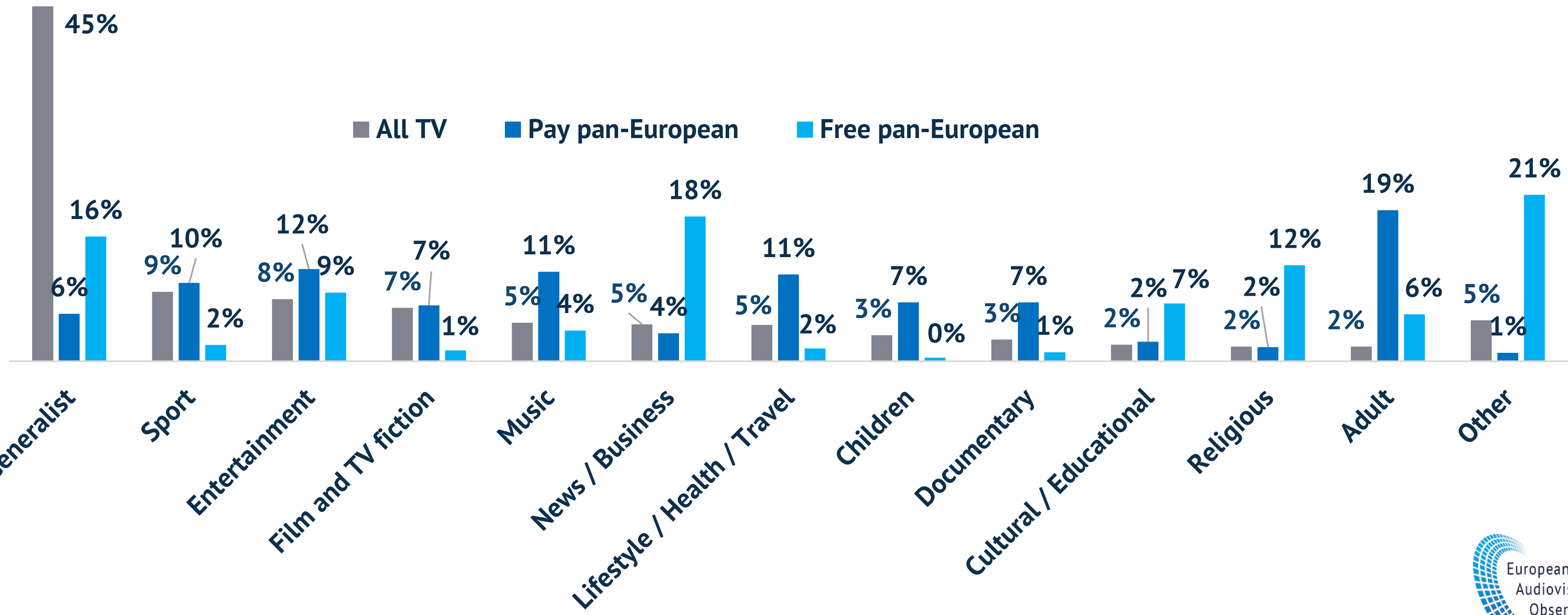
Source: European Audiovisual Observatory / MAVISE

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

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

- **61% of pan-European TV channels available in Europe are accessible for free.**
- **Free pan-European TV channels focus mainly on news, generalist and religious content.**
- **Pan-European pay TV channels concentrate on adult, entertainment, music, lifestyle and sport.**

Percentage of free and pay pan-European TV channels offering the following categories of content | Dec. 2022

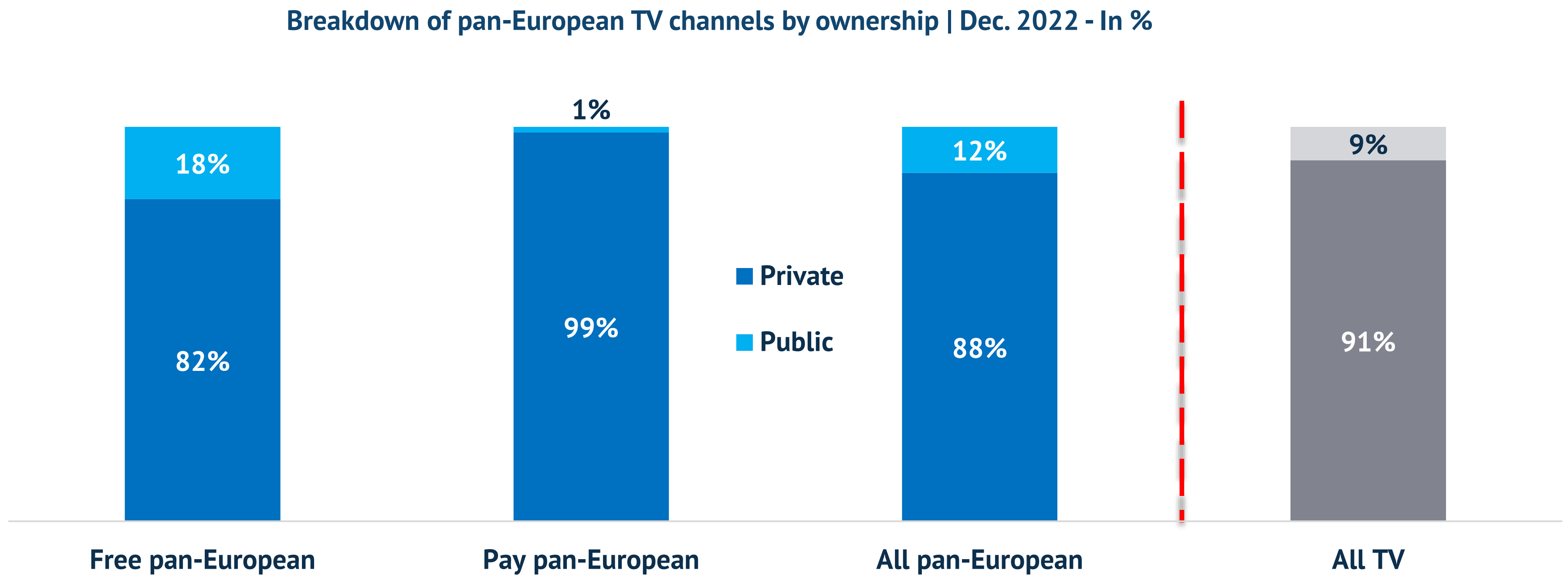


Source: European Audiovisual Observatory / MAVISE

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 generalist, news, and cultural-educational content.**
- **Most public TV channels available across Europe are from Russia, Spain, China and Germany.**



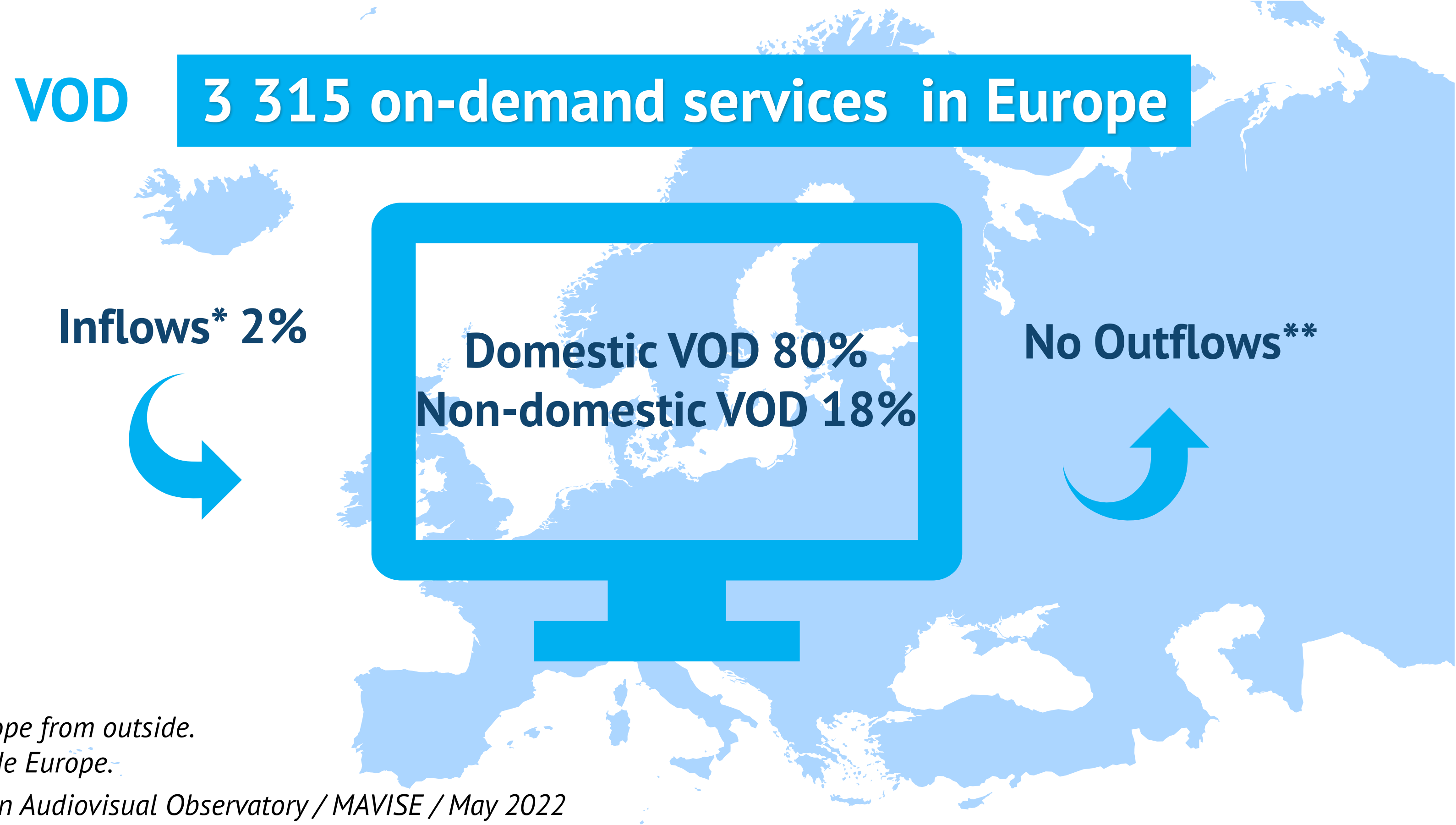
Source: European Audiovisual Observatory / MAVISE

The big picture – On-demand services

The big picture – On-demand services in Europe

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

- **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

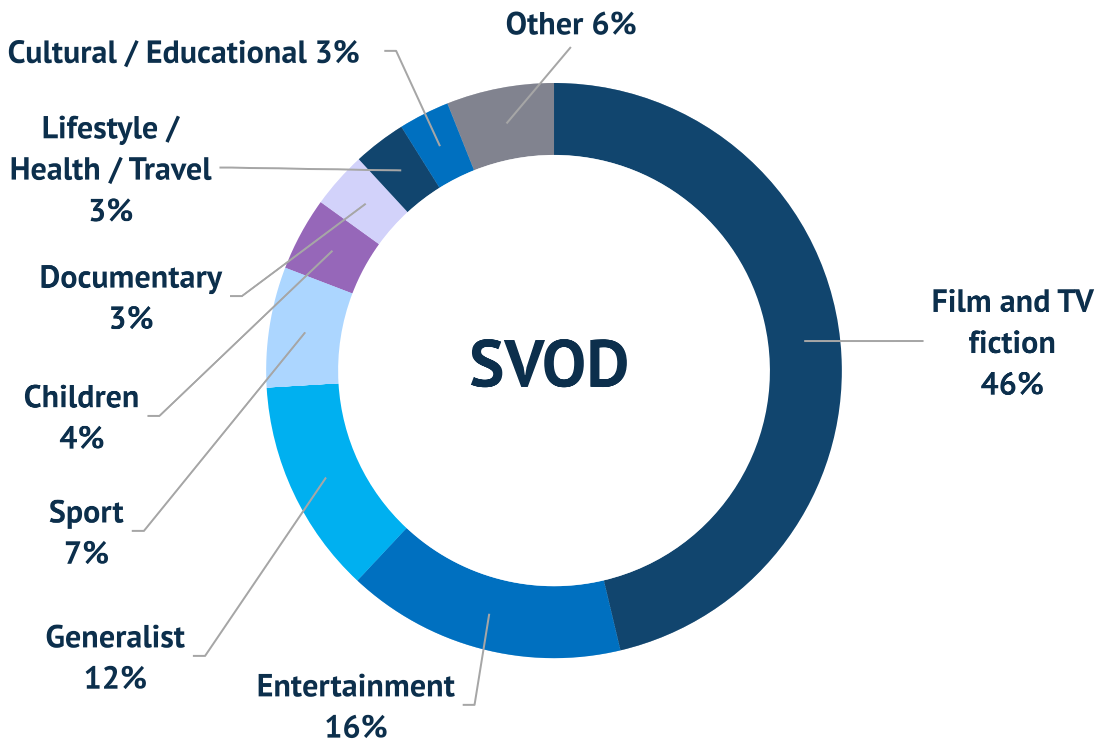
European Audiovisual Observatory

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).**

Percentage of SVOD services offering the following categories of content | Dec. 2022



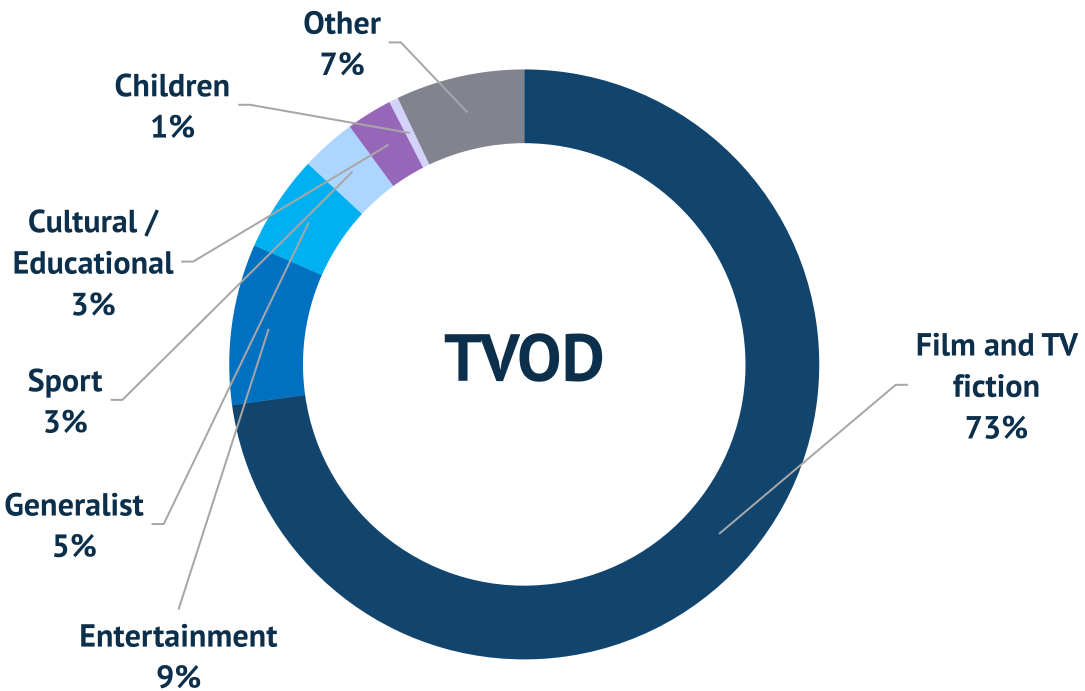
Source: European Audiovisual Observatory / MAVISE

The big picture – TVOD programming

TVOD offers the most cinema-like services with well 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.**

Percentage of TVOD services offering the following categories of content | Dec. 2022



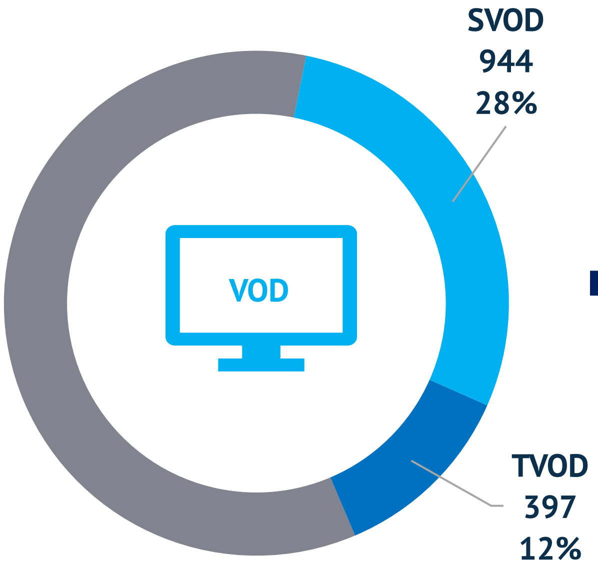
Source: European Audiovisual Observatory / MAVISE

The big picture – US-owned on-demand services

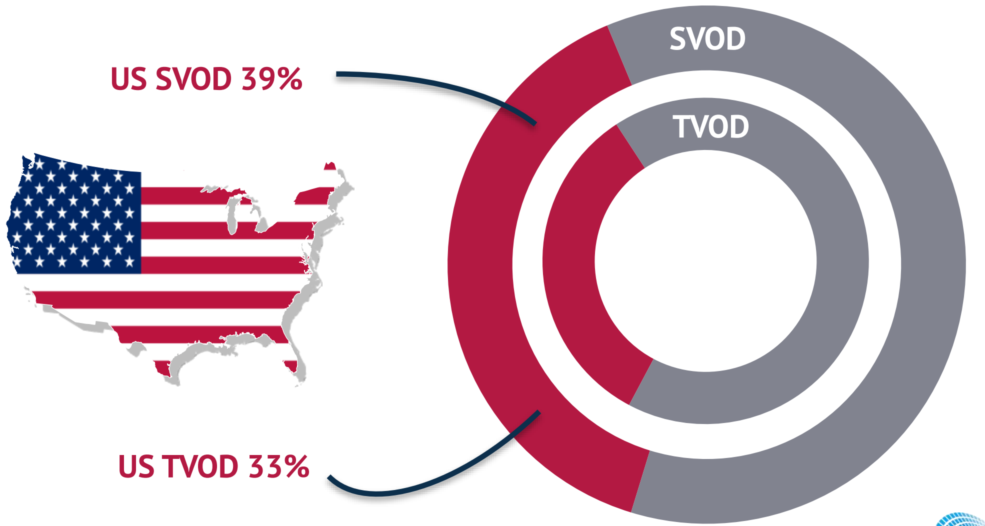
40% of all on-demand services in Europe are subscription or transactional video-on-demand.

- **A substantial part of on-demand services comprises SVOD (28%) and TVOD (12%). 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* | Dec. 2022
- In number of services and %



Share of US global streamers among SVOD and TVOD | Dec. 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

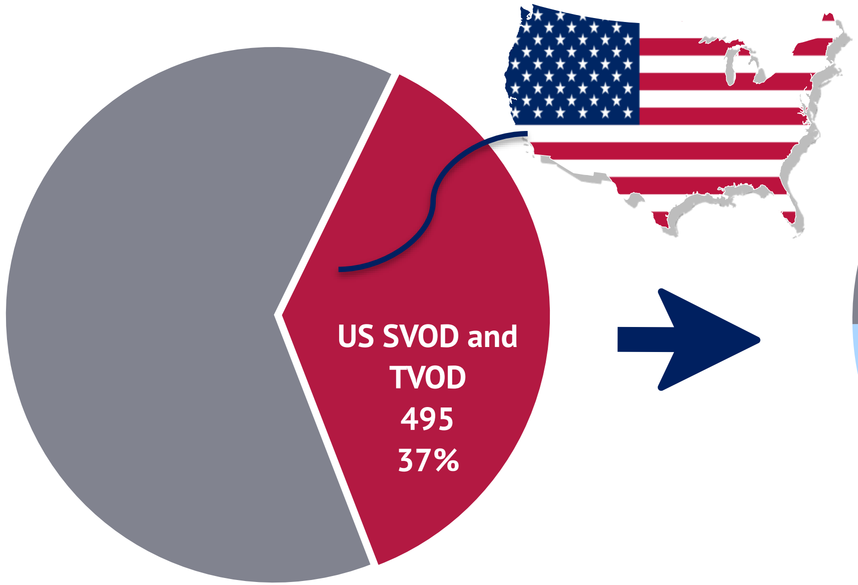
European Audiovisual Observatory

The big picture – US owned SVOD and TVOD services

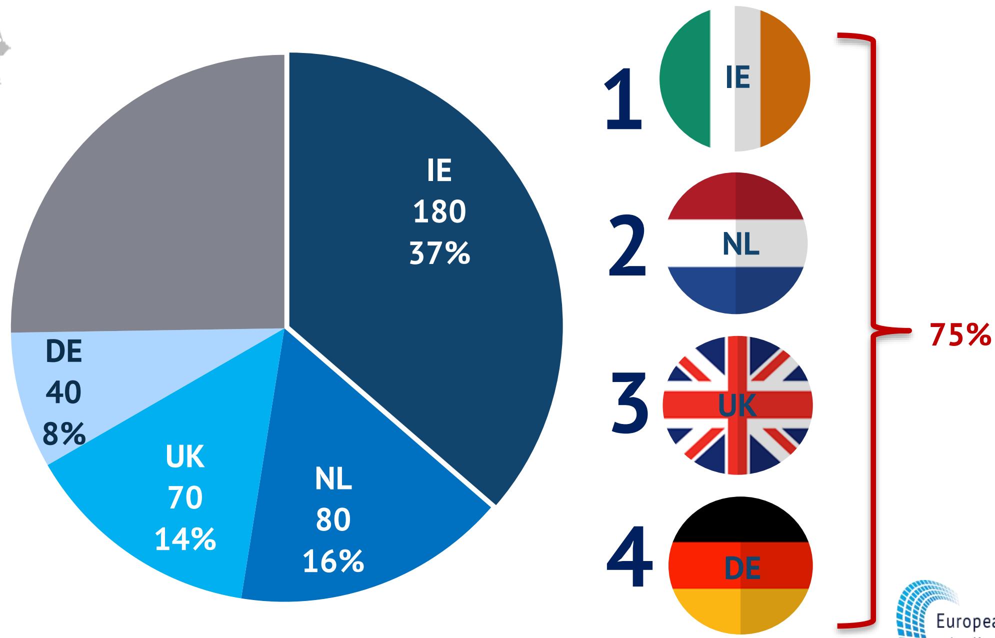
Around one in three SVOD and TVOD services in Europe is US-owned.

- Over one third of US-owned SVOD and TVOD services are based Ireland.
- Most US-owned SVOD and TVOD services serve European markets with country-specific catalogues.

US share of SVOD and TVOD among SVOD and TVOD | Dec. 2022 - In number of services and %



Breakdown of US-owned SVOD and TVOD by country of origin | Dec. 2022 - In number of services and %



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Source: European Audiovisual Observatory / MAVISE

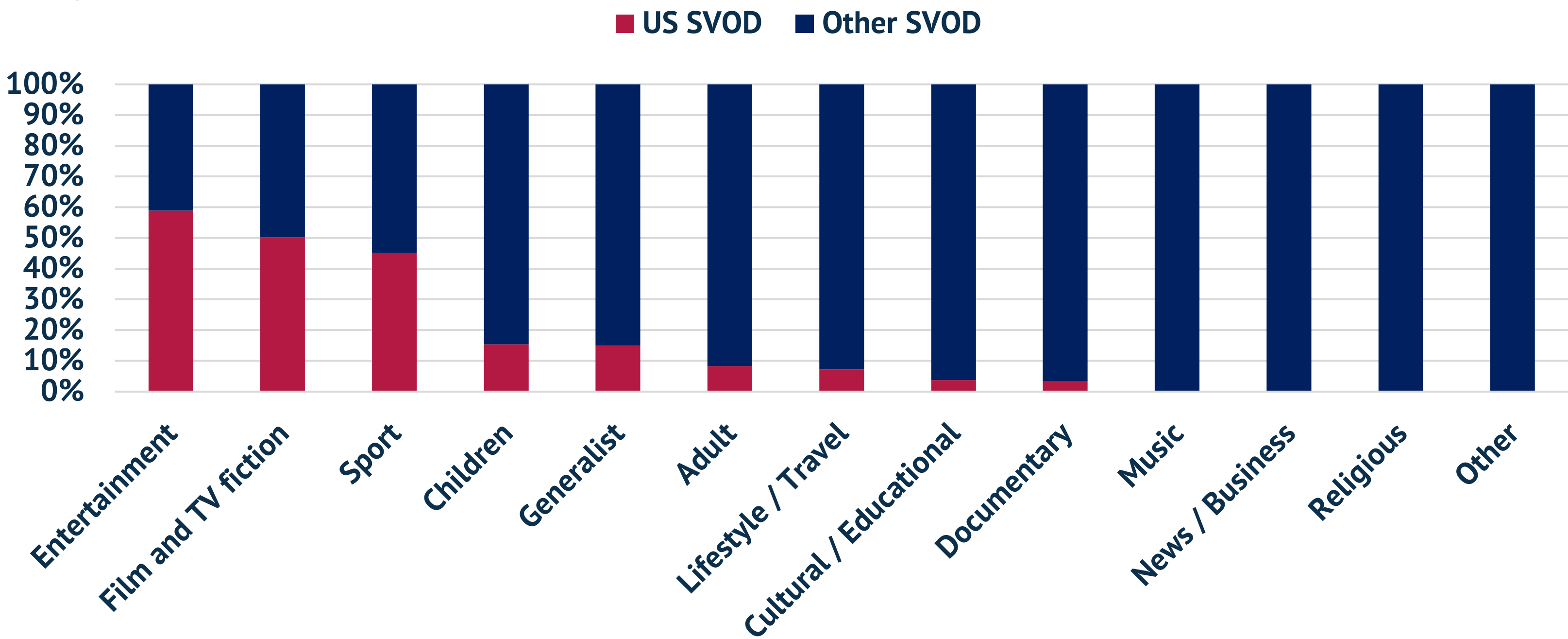
European Audiovisual Observatory

The big picture – Programming of US-owned SVOD services

Around 60% of entertainment subscription video-on-demand in Europe is US-owned.

- US subscription video-on-demand dominate entertainment as well as film and TV fiction programme offers. They are also very strong in sports programming.

Share of US-owned SVOD per category of content | Dec. 2022 - In %



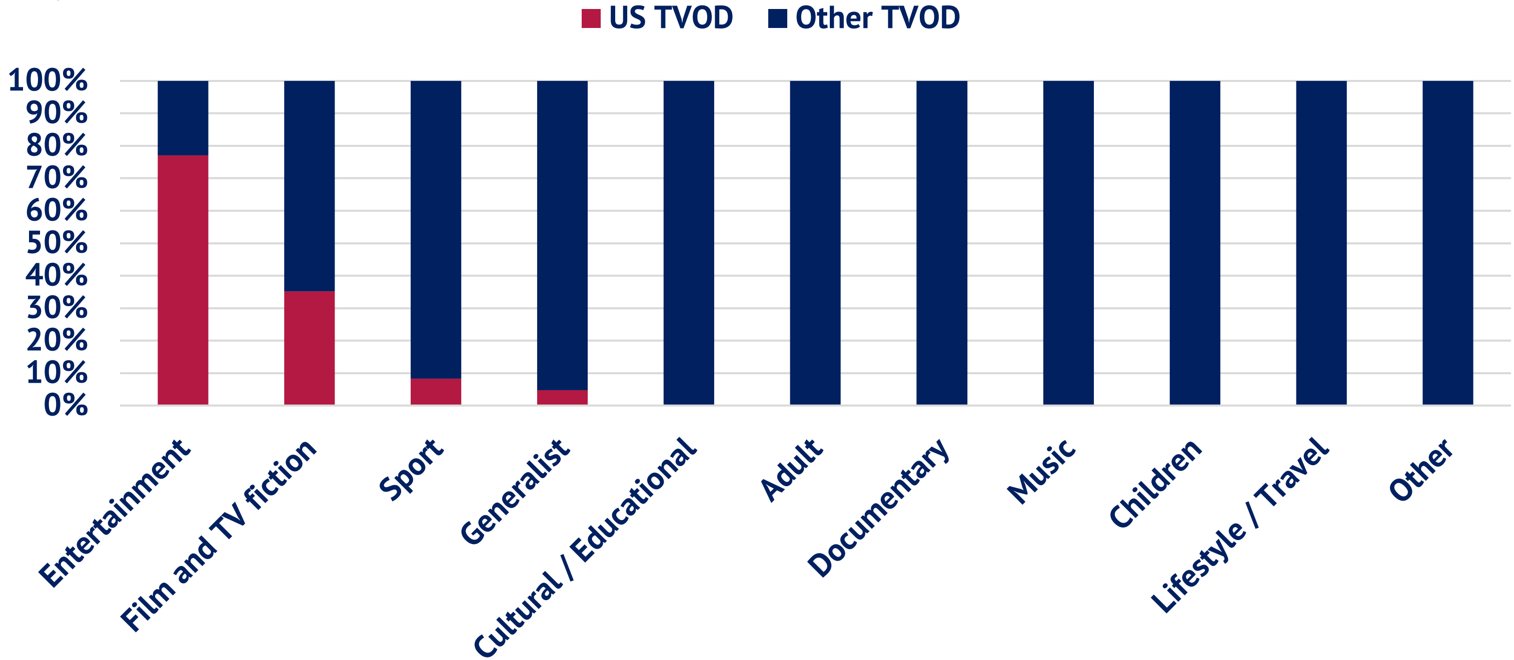
Source: European Audiovisual Observatory / MAVISE

European Audiovisual Observatory

Three out of four entertainment transactional video-on-demand services in Europe are US-owned.

- **US transactional video-on-demand services dominate entertainment and are also very strong in film and TV fiction programming.**

Share of US-owned TVOD per category of content | Dec. 2022 - In %

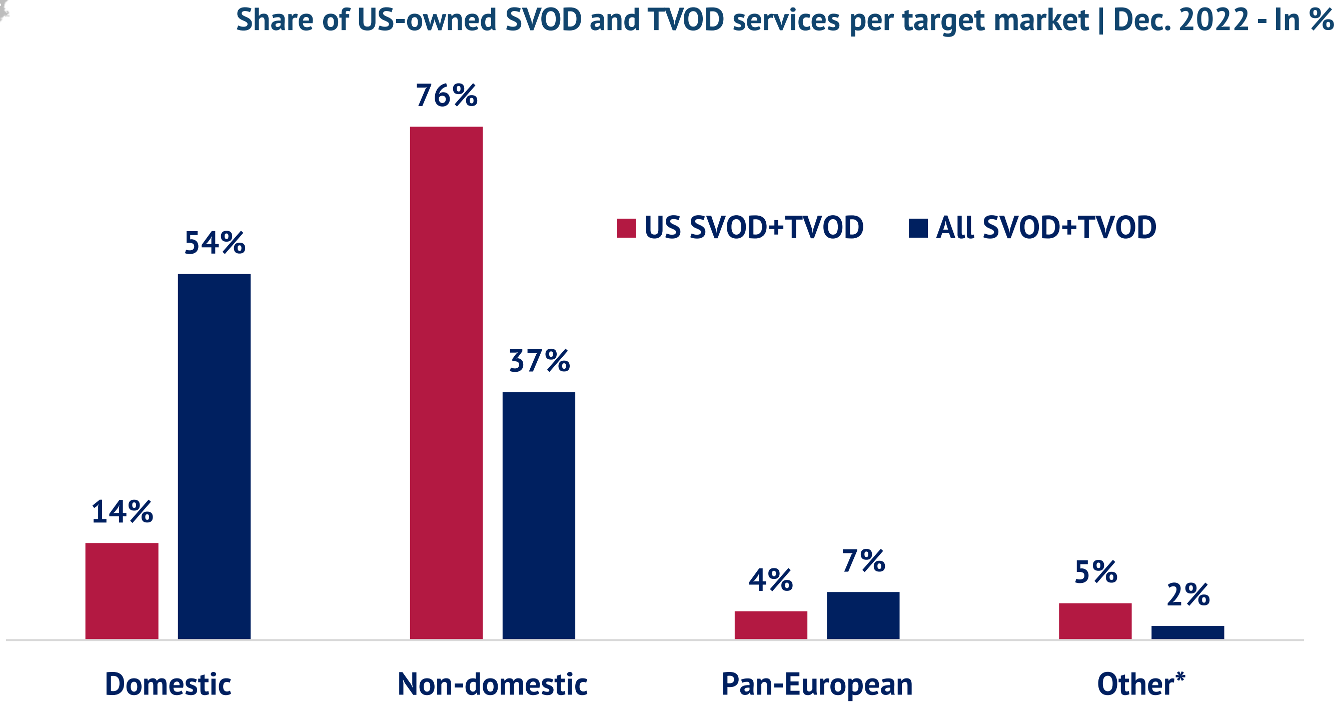


Source: European Audiovisual Observatory / MAVISE

The big picture – Markets targeted by US-owned on-demand services

US networks are overrepresented among non-domestic SVOD and TVOD services.

- **Many US SVOD and TVOD services target markets different to their country of establishment. Around one in ten US services operate as pure domestic services and just 4% as pan-European services.**



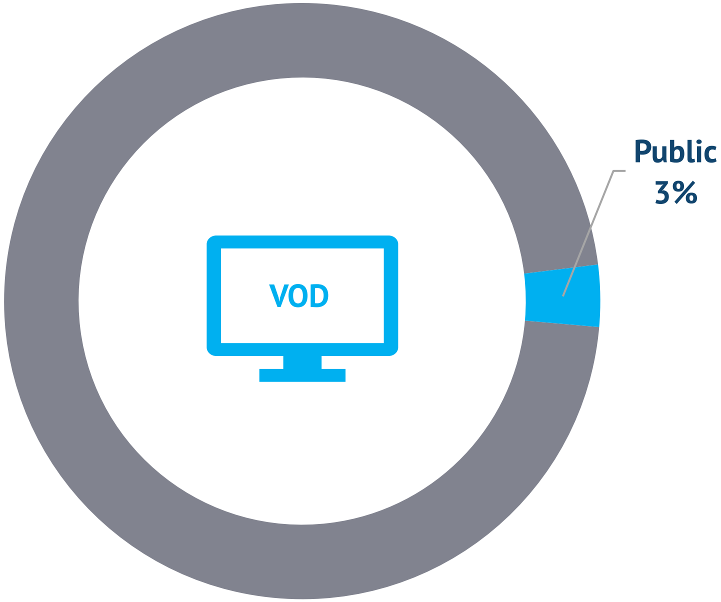
**Other includes services targeting European markets from outside of Europe.*
Source: European Audiovisual Observatory / MAVISE

The big picture – Ownership of on-demand services

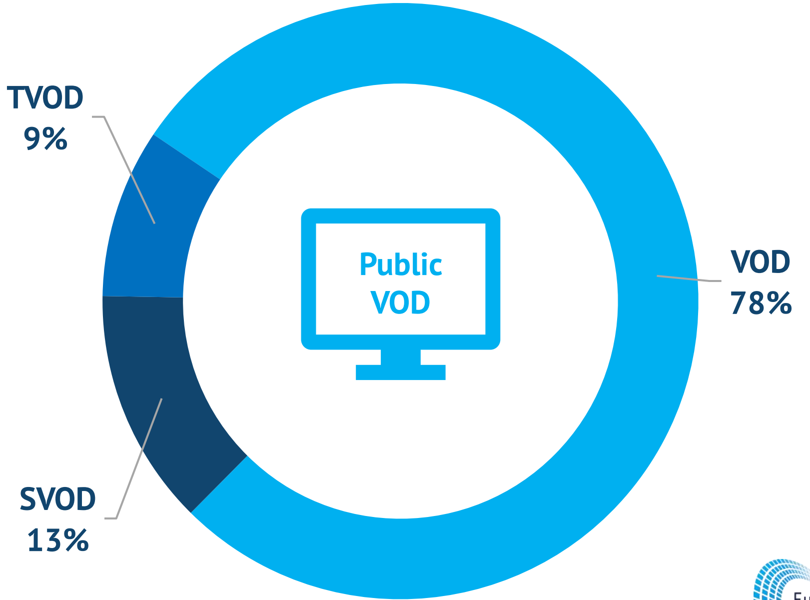
The overwhelming majority of on-demand services in Europe are in private ownership.

- **Publicly-owned players 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), specific professional target groups (e.g. Educ' ARTE) or national audiences (e.g. Polish TVP VOD, Dutch NPO Start Plus).**

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



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



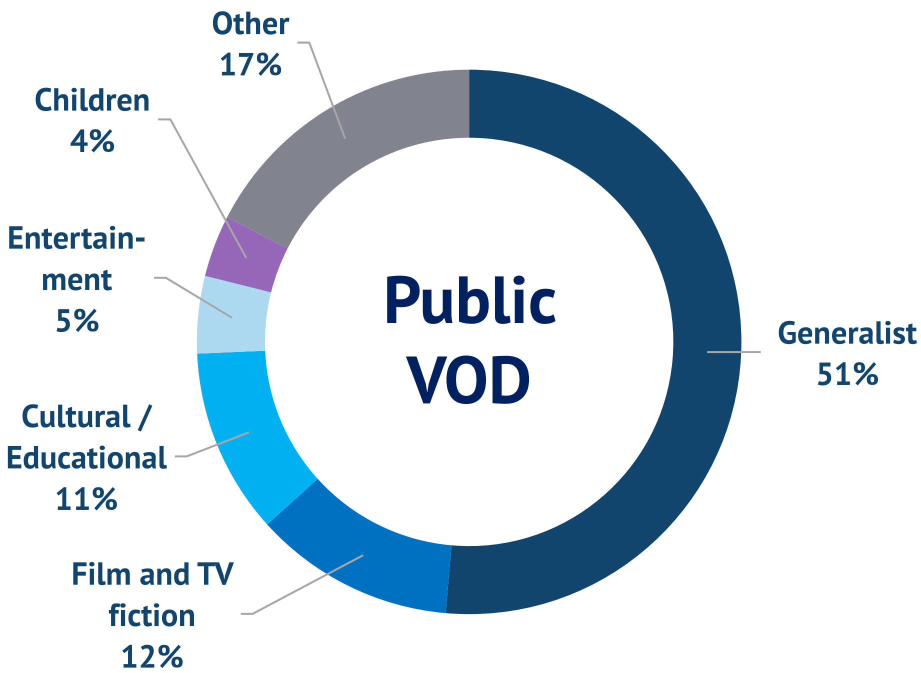
Source: European Audiovisual Observatory / MAVISE

The big picture – Programming of on-demand services in public ownership

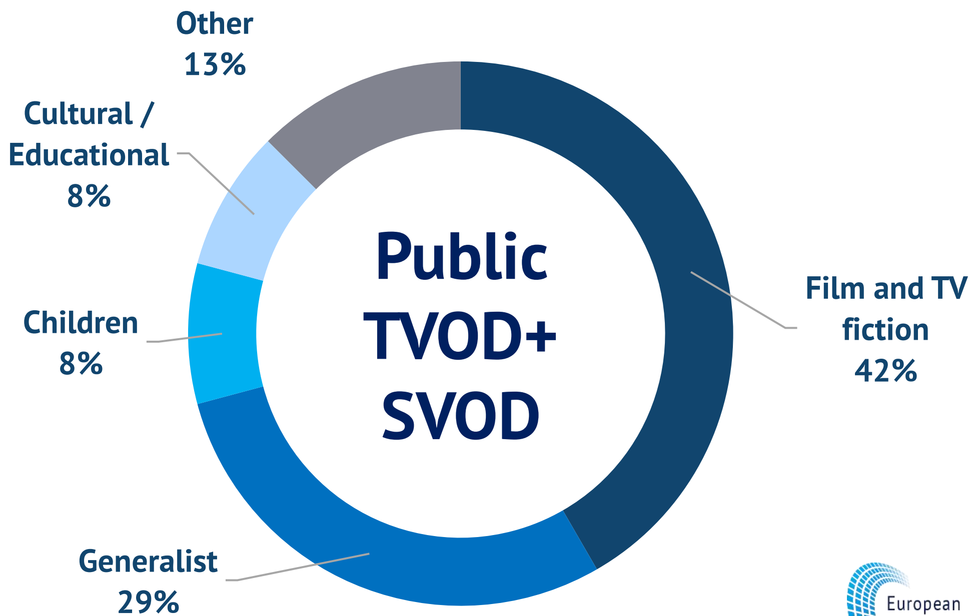
As with TV, most of the non-linear programming offerings of public services have a generalist focus.

- **While half of the non-linear content offerings are generalist catch-up TV, public services 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.**

Percentage of public on-demand services offering the following categories of content | Dec. 2022



Percentage of public TVOD and SVOD services offering the following categories of content | Dec. 2022



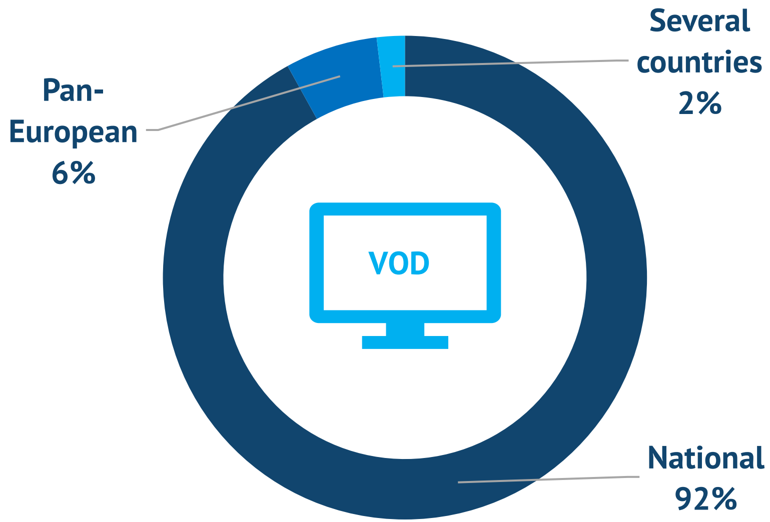
European Audiovisual Observatory

The big picture – Coverage of on-demand services

The majority of on-demand services in Europe operate in their domestic markets only.

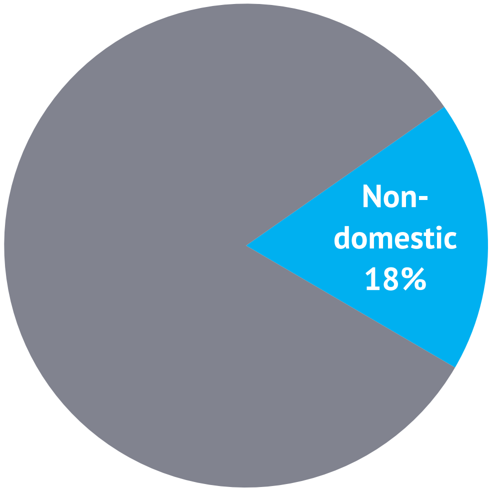
- **One in ten on-demand services (8%) operate in several markets or on pan-European level.**
- **18% of all on-demand services in Europe serve non-domestic markets.**

Breakdown of on-demand services by coverage | Dec. 2022 – In %



Coverage

Share of non-domestic* on-demand services | Dec. 2022 - In %



* *Non-domestic on-demand services are those that serve a market other than their country of establishment.*
Source: European Audiovisual Observatory / MAVISE

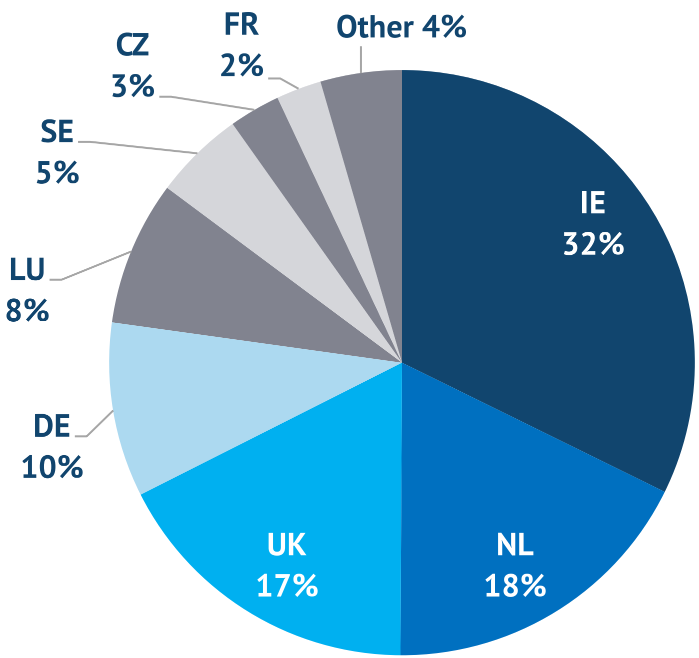
European Audiovisual Observatory

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

Around 600 on-demand services available in Europe operate in non-domestic markets only.

- **Three countries account for 77% of on-demand services serving non-domestic markets only. They include Ireland, the Netherlands, the UK and Germany who are also hubs for the most significant US global streaming players.**

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



Examples of non-domestic VOD networks based in top 4 hubs | Dec. 2022

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

2 NL — US: Disney (Disney+), Netflix, Liberty Global (Virgin, UPC), Warner Bros. Discovery (Discovery+)
EUR: Antenna Group (AXN+)

3 UK — US: Comcast (Hayu, Sky), DAZN, Paramount Global (Nickelodeon Play)
EUR: BBC (iPlayer), ITV (Britbox), Sandbox Edutainment (Hopster), Viasat, Vivendi (Filmbox)

4 DE — US: Amazon (Amazon Prime), Paramount Global (Pluto TV)
EUR: Splendid Median (Maxdome)

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Source: European Audiovisual Observatory / MAVISE

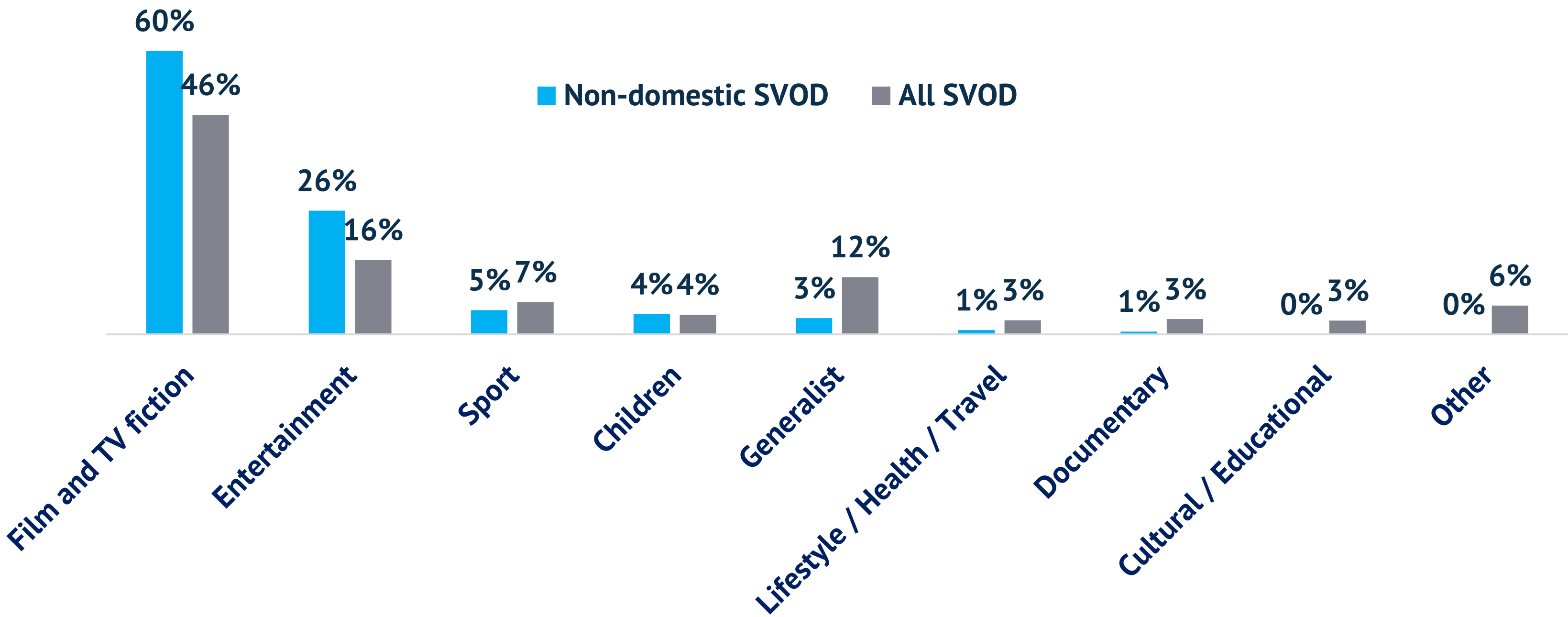
European Audiovisual Observatory

The big picture – Programming of non-domestic SVOD services

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

- Compared to SVOD in general, the programming of non-domestic SVOD is very concentrated with a small range of content types.
- Generalist SVOD services are mainly targeted at domestic audiences.

Percentage of non-domestic SVOD services offering the following categories of content | Dec. 2022



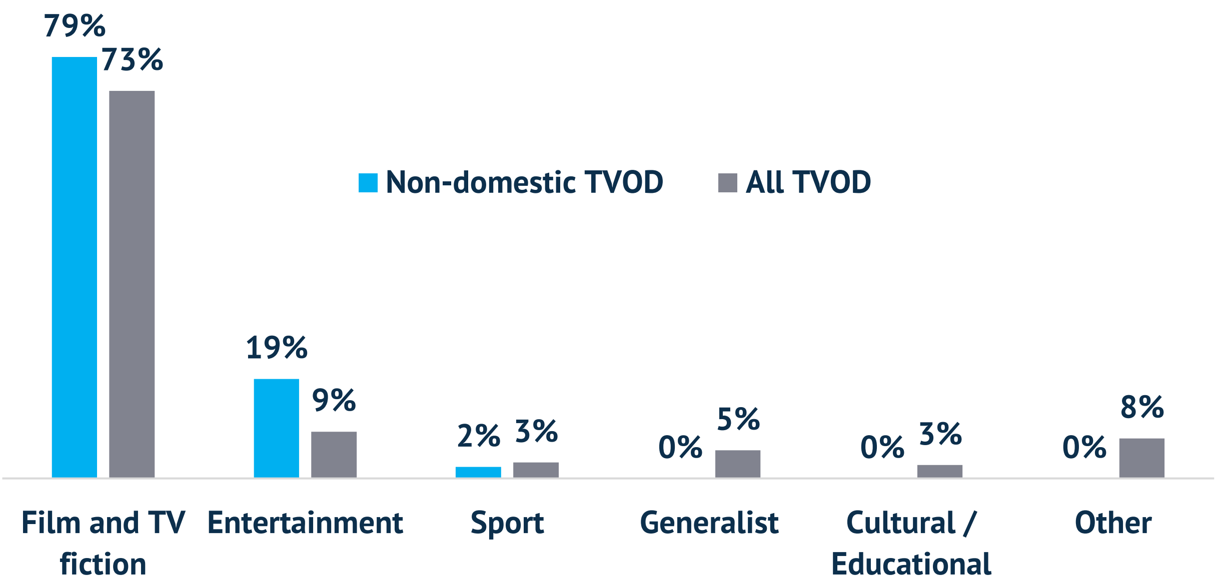
Source: European Audiovisual Observatory / MAVISE

The big picture – Programming of non-domestic TVOD services

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.**

Percentage of non-domestic TVOD services offering the following categories of content | Dec. 2022



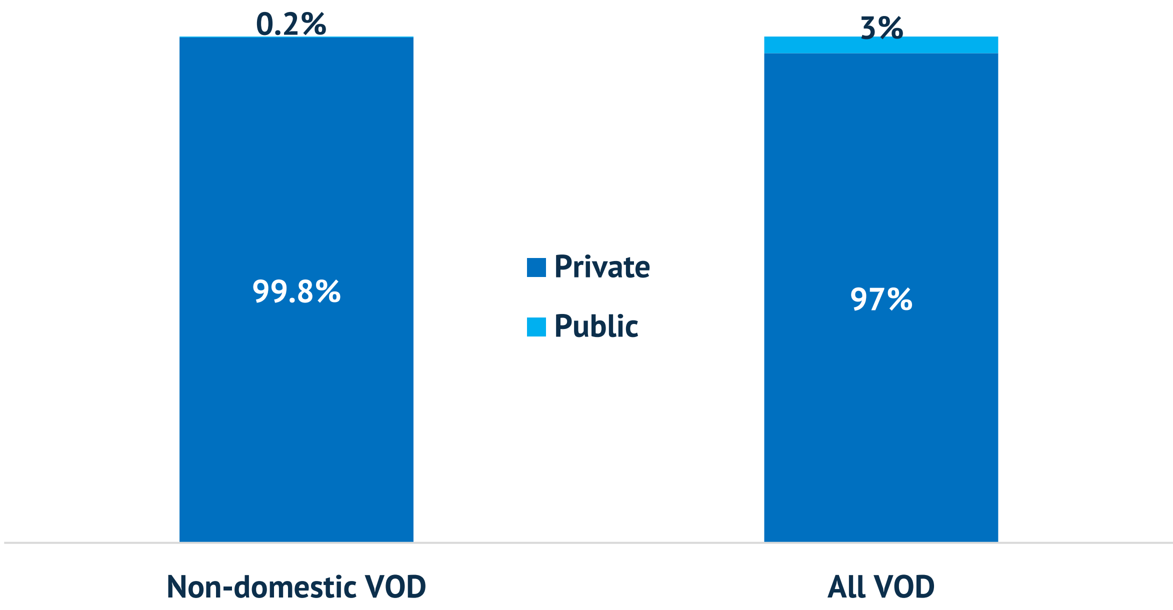
Source: European Audiovisual Observatory / MAVISE

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 focus on foreign markets belong to a private company.**

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



Source: European Audiovisual Observatory / MAVISE

Part II. Main players

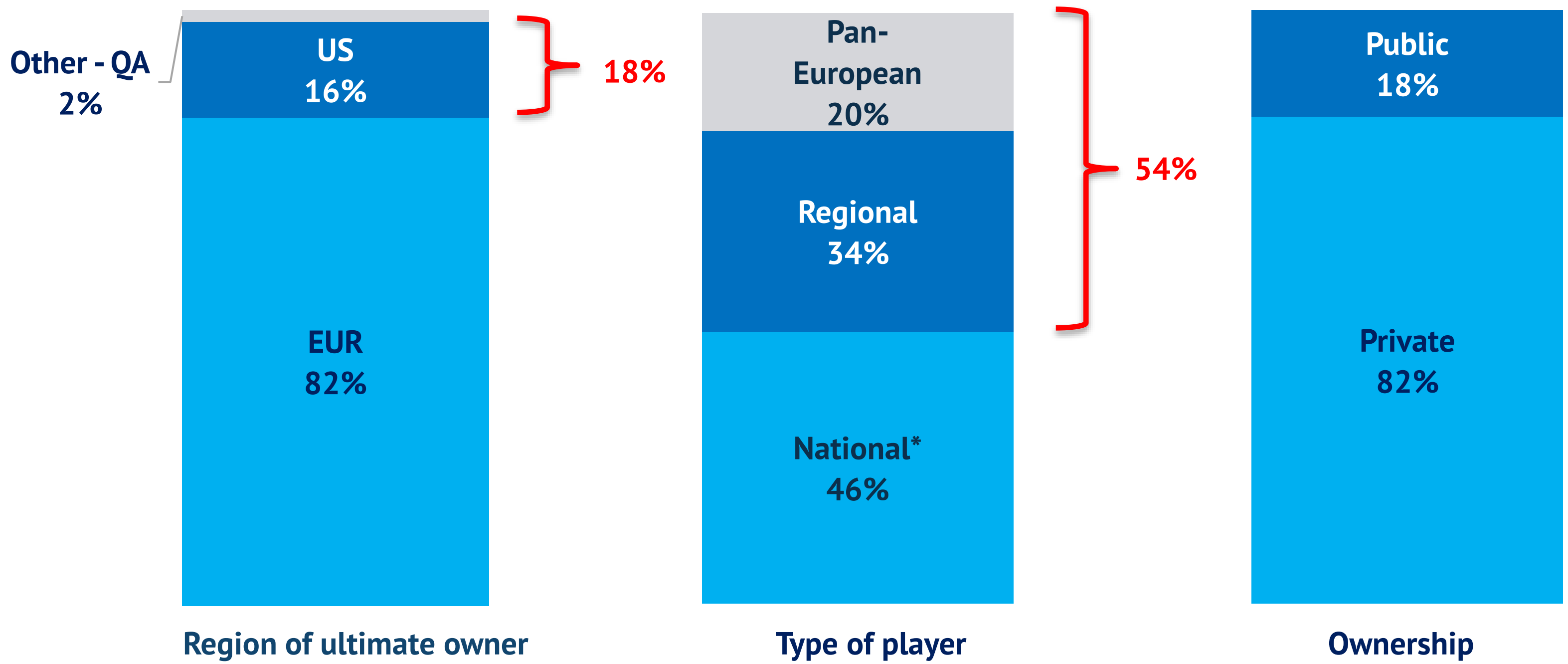
Main players – Top 50

Main players – The top 50 TV groups

Around one in five of the top TV groups in Europe has a non-European parent company.

- **Over half of the top 50 TV groups in Europe operate services outside their national markets. A total of 34% do so within a regional scope and 20% on a pan-European level.**
- **Around 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 | Dec. 2022 - In %



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

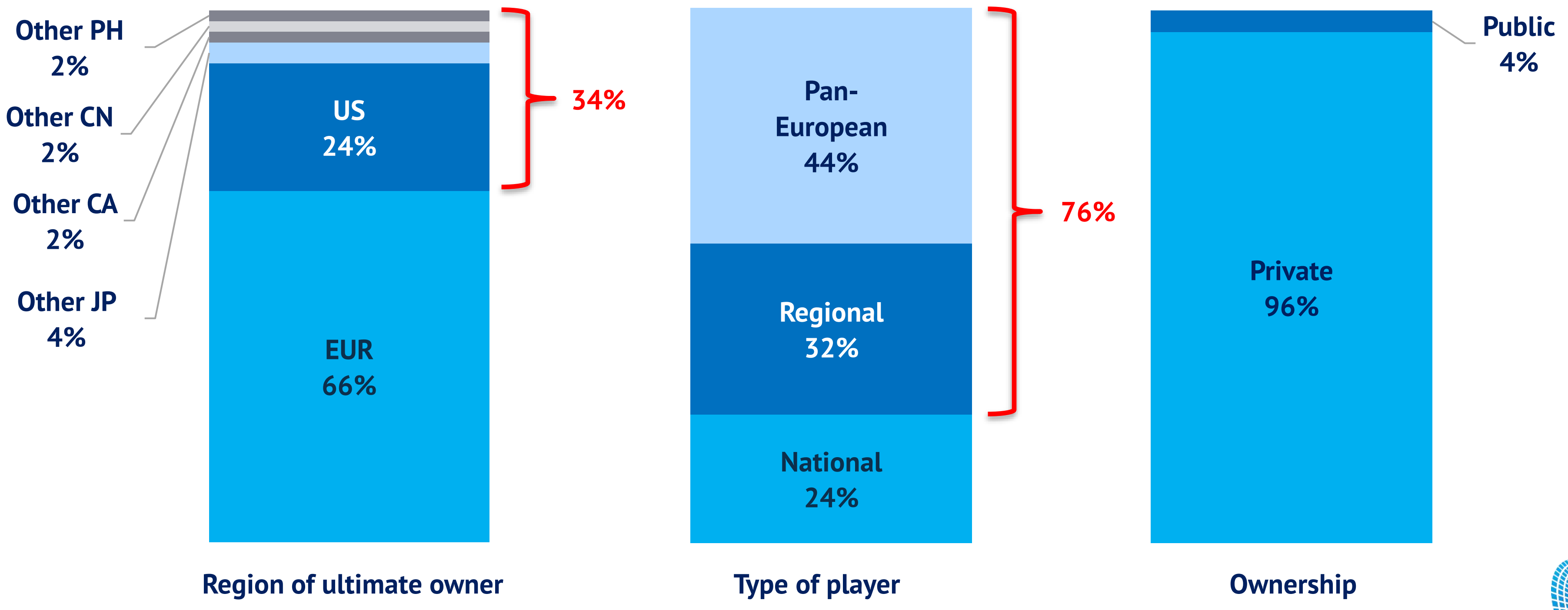
Source: European Audiovisual Observatory / MAVISE

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

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

➢ **Three out of four of the top 50 on-demand service groups in Europe operate services outside their national 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 | Dec. 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	363	46	Animal Planet, Boomerang, Cartoon Network, Discovery, Eurosport, ID, TLC
2	Paramount (Europe) | Paramount (US)	Private	229	41	Comedy Central, MTV, Nick Junior, Nickelodeon, Paramount, Pluto TV
3	Comcast (Europe) | Comcast (US)	Private	179	36	13th Street, E! Entertainment, Sky
4	The Walt Disney Company (Europe) | The Walt Disney Company (US)	Private	125	44	24 Kitchen, Disney Channel, ESPN, Fox, National Geographic
5	United Group (CZ) | BC Partners (UK)	Private	123	10	Diema Sport, N1 TV, Nova, SK Sport Klub
6	Groupe Canal Plus (FR) | Vivendi (FR)	Private	115	26	Canal+, Ciné+, Filmbox
7	AMC Networks (Europe) | AMC Networks Inc (US)	Private	72	29	AMC TV, JimJam, Spektrum TV, Sundance TV, TV Paprika
8	Telekom Srbija (RS) | Government of Serbia (RS)	Public	63	6	Arena Sport, Prva, TV KCN
9	BBC (UK) | Government of United Kingdom (UK)	Public	62	27	BBC Brit, BBC Earth, BBC First, Cbeebies
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.*

** *Examples of main brands by group; not exhaustive.*

Source: European Audiovisual Observatory / MAVISE / Dec. 2022

European Audiovisual Observatory

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	116	31	Discovery+, Eurosport, HBO Max
2	Comcast (Europe) | Comcast (US)	Private	107	37	Hayu, Sky Go/Now, Sky Kids
3	Google (Europe) | Alphabet (US)	Private	92	35	Google Play, YouTube Premium/ Kids
4	Groupe Canal Plus (FR) | Vivendi (FR)	Private	63	13	Canal+, Canal+ Kids, Filmbox+
5	Apple (Europe) | Apple Inc (US)	Private	60	31	Apple TV+, iTunes Store
6	The Walt Disney Company (Europe) | The Walt Disney Company (US)	Private	52	36	Disney+
7	Amazon Prime Video (Europe) | Amazon Inc (US)	Private	47	39	Amazon Prime
8	Netflix (Europe) | Netflix (US)	Private	44	40	Netflix
9	Paramount (Europe) | Paramount (US)	Private	42	28	Nickelodeon, Paramount+, Pluto TV
10	HLD Europe (LU) | Compagnie de développement et d'animation (FR)	Private	40	4	Humanity, Live Opéra Versailles

* *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 / Dec. 2022

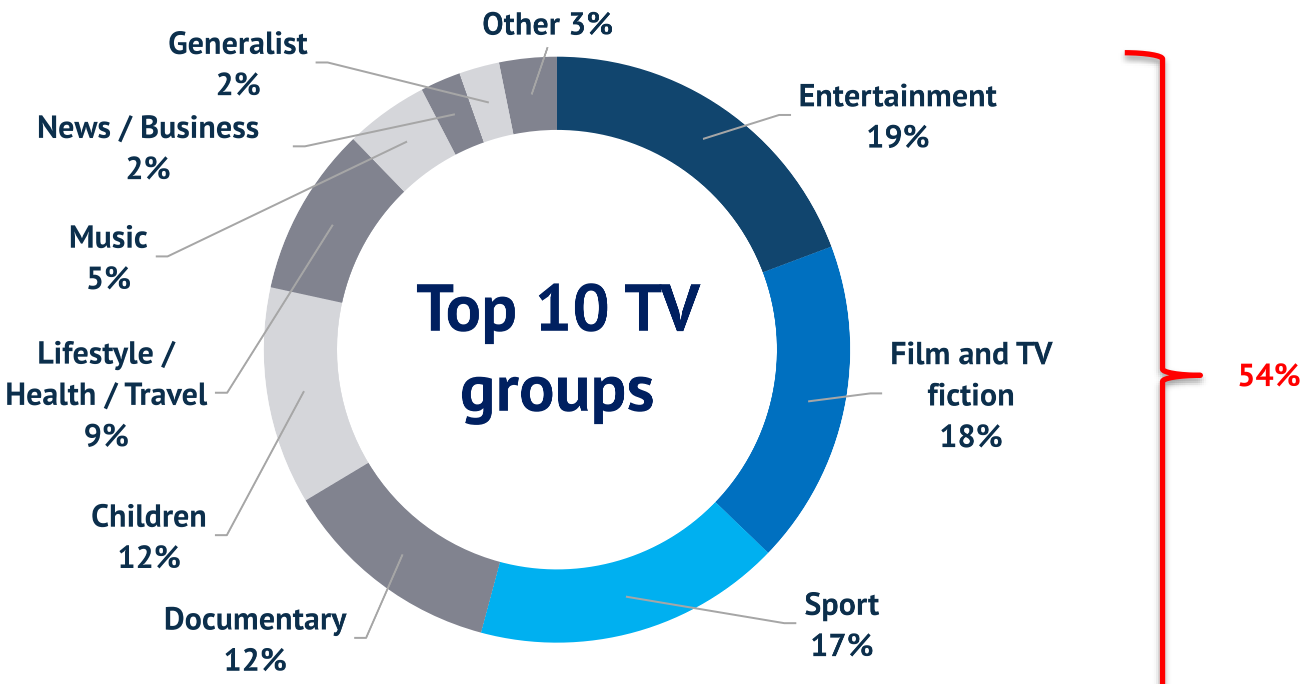
European Audiovisual Observatory

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.**

Percentage TV channels of top 10 TV groups in Europe offering the following categories of content | Dec. 2022



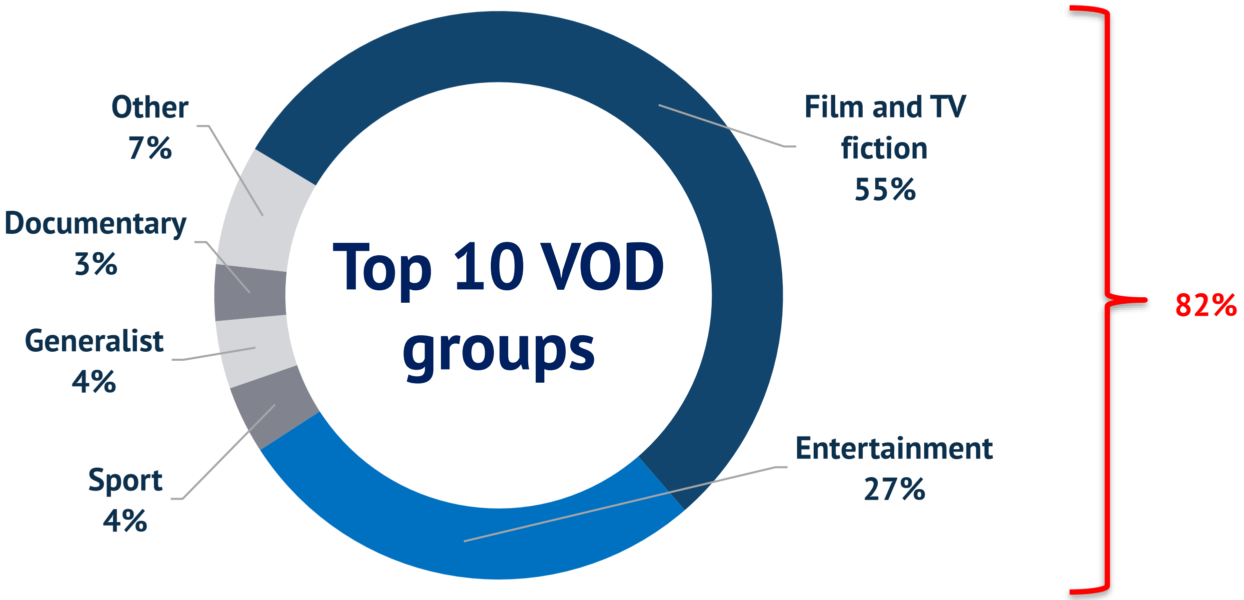
Source: European Audiovisual Observatory / MAVISE

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

The top 10 groups for on-demand in Europe represent 20% of the total service offering in Europe.

- **The majority of the top 10 VOD group brands comprise thematic TVOD and SVOD services catering to specialist interests. The share of services offering generalist programming is 4%.**
- **The overwhelming majority - around four out of five services of the top 10 VOD groups - offer film and TV fiction, and entertainment programming.**

Percentage of VOD services of top 10 groups for on-demand services in Europe* offering the following categories of content | Dec. 2022



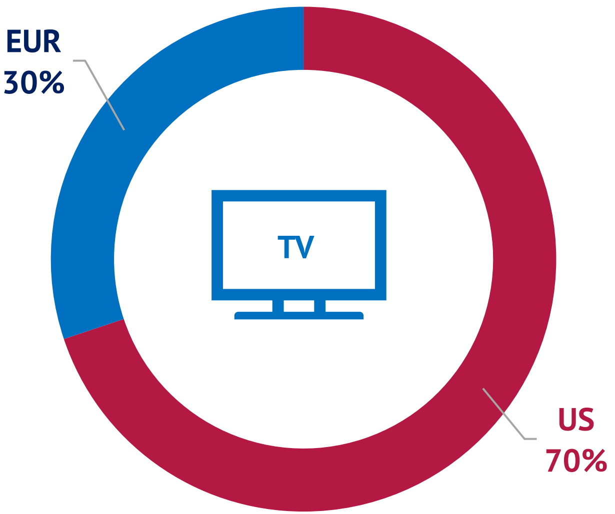
Includes TVOD and SVOD services only as programming of other VOD services is difficult to assess.
Source: European Audiovisual Observatory / MAVISE

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

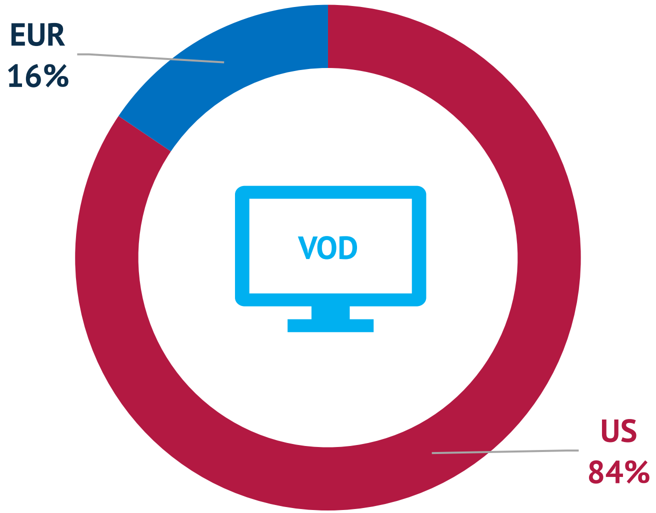
Service portfolios of US players outsize those of European competitors.

- **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.**
- **84% of on-demand services in the top 10 groups belong to eight US global streamers.**

US share among top 10 TV group TV channel portfolio | Dec. 2022 - In %



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



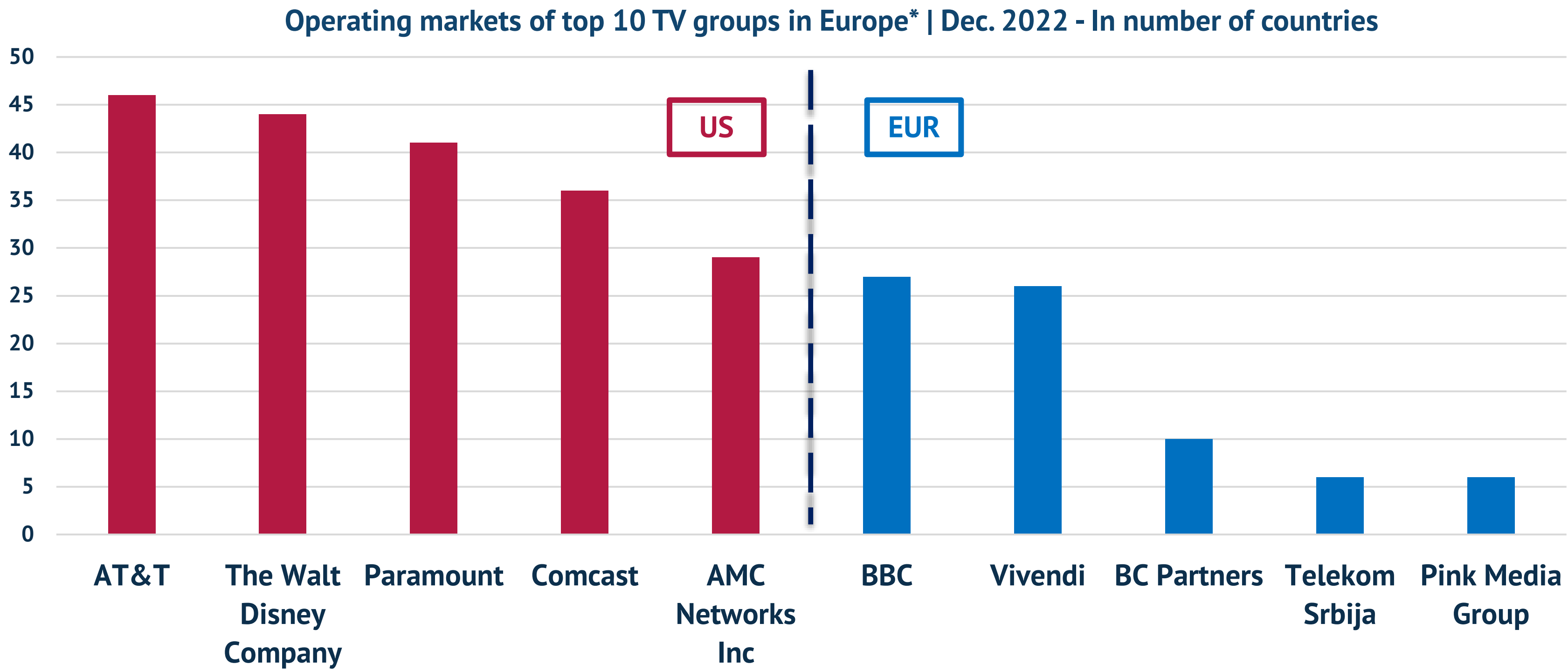
European Audiovisual Observatory

Source: European Audiovisual Observatory / MAVISE

Main players – Operating markets of top 10 TV groups

The Walt Disney Company is present in 44 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.**



Source: European Audiovisual Observatory / MAVISE

The Walt Disney Company (US)

The Walt Disney Company is present in 44 European TV markets

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

28 EEA countries

AT, BE, BG, CY, CZ, DE, DK, EE, ES, FI, FR, GR, HR, HU, IE, IS, 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.*

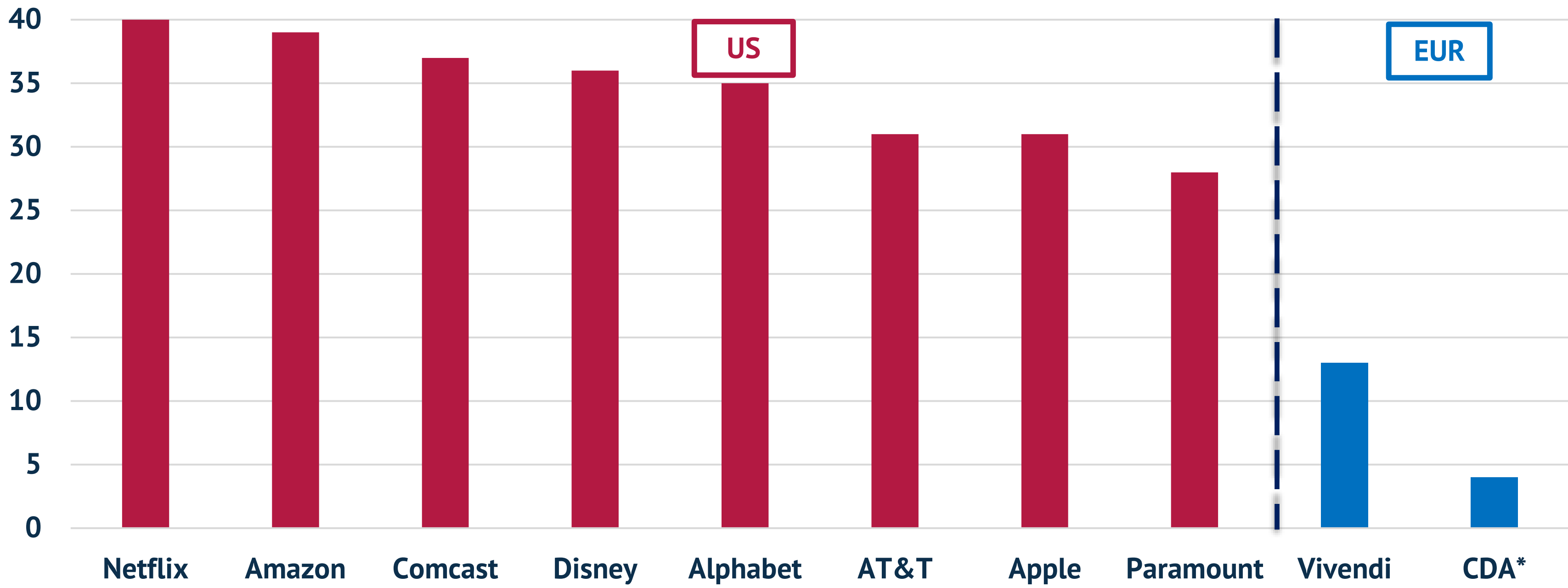
Map of Europe © Copyright Showeet.com
Source: European Audiovisual Observatory / MAVISE / Dec. 2022

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

Netflix is present in 40 European on-demand markets.

- Nine out of the 10 groups for on-demand services operate on a pan-European level.
- Netflix together with other US groups has the largest scope of operating markets across Europe.

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



*Compagnie de développement et d'animation
Source: European Audiovisual Observatory / MAVISE

Amazon Inc (US)

Amazon Prime is present in 39 European on-demand markets

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

10 European countries*

AL, AM, BA, CH, ME, MK, RS, TR, UK

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

Map of Europe © Copyright Showeet.com

Source: European Audiovisual Observatory / MAVISE / Dec. 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*
1	Warner Bros. Discovery (Europe) | AT&T (US)	Private	363	CZ, DE, ES, FI, FR, IE, IT, NL, NO, PL, TR, UK (12)
2	Paramount (Europe) | Paramount (US)	Private	229	CH, CZ, DE, ES, FR, IT, NL, SE, TR, UK (10)
3	Comcast (Europe) | Comcast (US)	Private	179	AT, CH, DE, ES, FR, IT, LU, UK (8)
4	The Walt Disney Company (Europe) | The Walt Disney Company (US)	Private	125	BG, DE, ES, FI, FR, NL, TR, UK (8)
5	United Group (CZ) | BC Partners (UK)	Private	123	BA, BG, GR, HR, LU, ME, RS (7)
6	Groupe Canal Plus (FR) | Vivendi (FR)	Private	115	ES, FR, LU, NL, PL, TR, UK (7)
7	AMC Networks (Europe) | AMC Networks Inc (US)	Private	72	BA, CZ, DE, ES, UK (5)
8	BBC (UK) | Government of United Kingdom (UK)	Public	70	LU, NL, UK (3)
9	Telekom Srbija (RS) | Government of Serbia	Public	62	HR, LU, ME, RS (4)
10	Pink Media Group (RS) | Pink Media Group (RS)	Private	59	RS (1)

**No doubles; excludes joint ventures.*

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*
1	Warner Bros. Discovery (Europe) | AT&T (US)	Private	116	CZ, FR, NL, PL, SE, TR, UK (7)
2	Comcast (Europe) | Comcast (US)	Private	107	DE, IT, LU, UK (4)
3	Google (Europe) | Alphabet (US)	Private	92	IE, TR (2)
4	Groupe Canal Plus (FR) | Vivendi (FR)	Private	63	AT, FR, NL, PL, TR, UK (6)
5	Apple (Europe) | Apple Inc (US)	Private	60	IE, TR (2)
6	The Walt Disney Company (Europe) | The Walt Disney Company (US)	Private	52	CH, ES, NL, TR, UK (5)
7	Amazon Prime Video (Europe) | Amazon Inc (US)	Private	47	AL, AM, BA, CH, DE, GE, ME, MK, RS, TR, UK (11)
8	Netflix (Europe) | Netflix (US)	Private	44	NL, TR (2)
9	Paramount (Europe) | Paramount (US)	Private	42	IT, NL, PL, UK (4)
10	HLD Europe (LU) | Compagnie de développement et d'animation (FR)	Private	40	DE, FR (2)

** No doubles; excludes joint ventures .*

Source: European Audiovisual Observatory / MAVISE

European Audiovisual Observatory

Netflix (HQ in US)

Netflix is based in one main 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

European Audiovisual Observatory

**Different to the rest of the operating markets, Netflix has a domestic establishment in Türkiye.*

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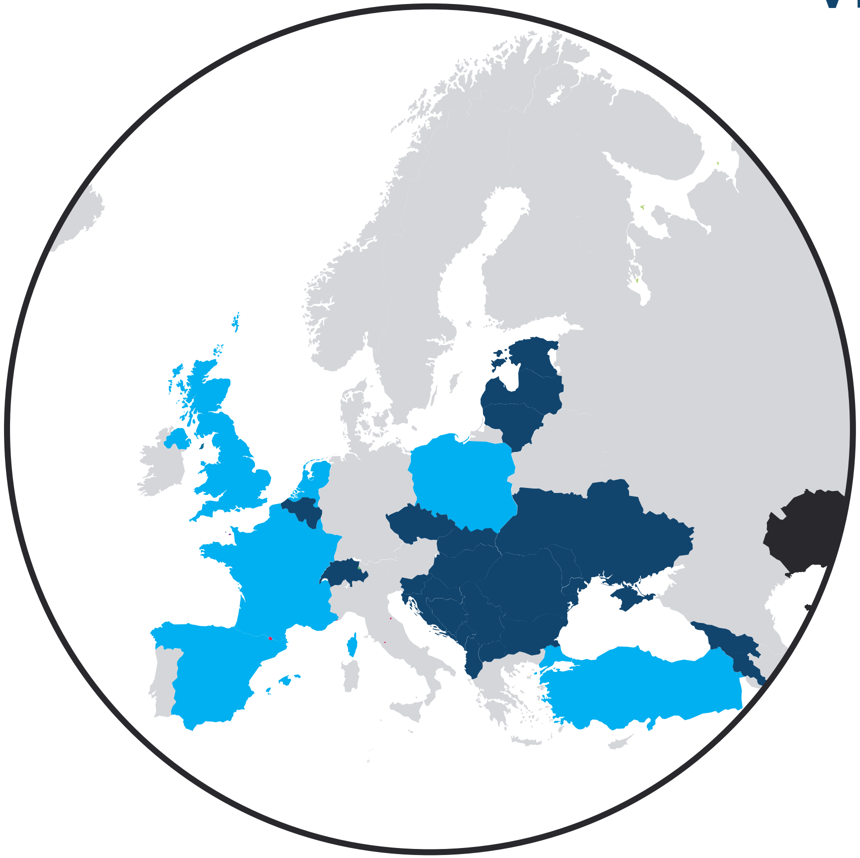

Vivendi (HQ in FR)

Vivendi is based in a limited number of countries, from where it serves 26 European TV markets

7 countries of establishment
ES, FR, LU, NL, PL, TR, UK

14 EEA markets
BE, BG, CZ, EE, FR, HR, HU, LT, LV, NL, PL, RO, SI, SK

12 European markets
AL, AM, BA, CH, GE, MD, ME, MK, RS, TR, UA

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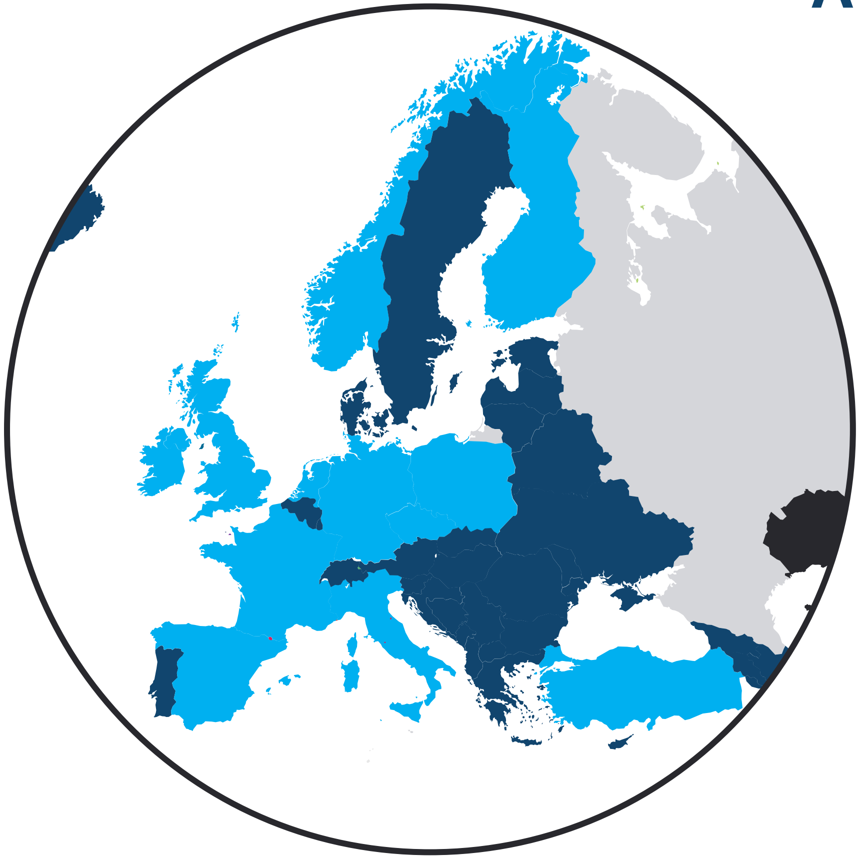

AT&T (HQ in US)

AT&T is based in several countries, from where it serves 46 European TV markets

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

29 EEA markets
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

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

* *Incl. microstates.*

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