Audiovisual media services in Europe - 2024 data

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Introduction

An ever-growing number of media services, be it TV channels, on-demand or video-sharing platforms are accessible in Europe. Millions of European use them everyday to learn about the world, educate or entertain themselves. An ever-growing number of media services means an ever-more challenging work to size and understand the European audiovisual sector. This report, based on the MAVISE database, aims at mapping the supply of audiovisual services, their programming, coverage and ownership in Europe.

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 services, private and public services, US owned services and platforms, channels on DTT networks, and services targeting multiple markets.

The second perspective looks at the **Main Players** operating in Europe with a specific focus on the top 20 TV and VOD groups and their presence in the various European markets. 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.

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Scope and methodology

MAVISE database: This publication is based on the analysis of December 2024 figures from MAVISE. 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: Based on MAVISE data, this report covers 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 (AV) media services and video-sharing platforms (VSPs) available in Europe: Figures for audiovisual media services and video-sharing platforms available in Europe are based on MAVISE data comprising a) all linear and non-linear audiovisual services and b) video-sharing platforms included in the registries of the audiovisual regulatory authorities in the territories covered by the MAVISE database. Please note that the registration of VSPs is still ongoing. The figures also include other audiovisual services and VSPs relevant from a market perspective.

Audiovisual media services and VSPs targeting national markets: AV media services and VSPs 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 and VSPs targeting multi-national markets: AV media services and VSPs targeting at least one specific market outside their country of establishment covered by MAVISE.

Includes services and platforms established in one country and exclusively targeting another foreign market.

Scope and methodology

Pan-European services: Audiovisual media services and VSPs with no specific target, available at pan-European level.

On-demand audiovisual media services: On-demand services registered or established in a country are counted on service level, irrespective of the number of catalogues.

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 channels with a DTT registration and b) any other TV channel on national DTT networks.

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

Local and regional public television in the Netherlands: a) The number of services are represented by the number of service providers (i.e. 1 service = 1 service provider), b) it also includes service providers that are only active in the radio business.

Main players: Excludes audiovisual media services and VSPs for which service providers could not be identified. Local audiovisual services are equally excluded from rankings to focus on players with national services portfolios and widest reach.

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1. Number of services

- The European audiovisual services sector continues to grow. The number of audiovisual media services and video-sharing platforms available increased in Europe to 12 955, growing by 2% between Dec. 2023 and Dec. 2024. The number of on-demand services grew faster (4%) than the number of TV channels (1%). The growth of TV channels is partly driven by FAST channels whose registrations are expected to increase in the near future.

- TV channels still represent the majority of media services in number (74%), followed by VOD (25%) and VSPs (1%). 41% of TV is made up of local and regional channels which is one of the reason why TV is overrepresented.

- Most audiovisual content offers thematic programmes (55%), in slight increase compared to last year (54%) thanks to the growth of channels providing entertainment content. But while on demand services have a clear focus on film and TV fiction content, TV programming is more fragmented in terms of thematic. The greater part of the TV offering caters to special interests in the form of thematic channels (56%) whilst the other TV channels provide generalist programming. In contrast, only one quarter of video-on-demand services and video-sharing platforms (24%) in Europe offer entertainment, film and TV fiction programming. However, more and more thematic streamers are taking a foothold in the market.

2. Public vs private ownership

- Media services and VSPs are mostly privately owned: 91% of the total is owned by private companies. Compared to TV channels, VOD and VSP services are more likely to be privately owned (10% vs 4%).

- 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. But with 8% of cable, IPTV and satellite services, public groups offer quite a number of thematic channels. Almost all on-demand services and VSPs are privately owned (96%). However, public service media have entered the VOD market as well, gradually expanding their catch-up services into full-fledge VOD services. Publicly owned VOD services also provide thematic programming such as film archives, cultural and educational services, platforms for children and entertainment services. The top 50 groups is also more private in VOD with 96% of private companies compared to 89% of the top 50 in TV.

- The category of content is quite different between public TV channels and public VOD/VSPs. While specialised films and TV fiction public channels almost don't exist, they account for 14% of public VOD services. It seems that PSMs propose a more thematic offer for their online presence, adapted to on-demand consumption and audience fragmentation in the digital environment, while also monetizing their content libraries (i.e. box series).

3. Footprint

- TV and on-demand services targeting Europe from outside make up just 2%. Conversely, there are very few exports out of Europe. From all audiovisual services established and available in Europe, 77% of TV and 87% of VOD serve national 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 services available in Europe with a multi-national or pan-European coverage is a combined 23% for television and 13% for on-demand services.

- The programming content of multi-national[1] TV channels and on demand services is almost entirely thematic. The main establishment hubs for multi-national TV channels are the Netherlands, Spain, Sweden and the United Kingdom. Most multi-national TV channels are privately owned.

- Fewer in numbers but omnipresent, around 7% 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 (9%). While most free satellite channels are news, generalist and religious channels, pan-European satellite channels for pay tend to be services with adult, entertainment, music, lifestyle and sport content.

1 Audiovisual media services and VSPs targeting at least one specific market outside their country of establishment covered by MAVISE. Includes services and platforms established in one country and exclusively targeting another foreign market.

4. US groups in Europe

- Overall, US groups have a substantial influence on the European audiovisual sector, with significant portfolios and market presence compared to their European counterparts. One in four (25%) of all private TV channels (excluding local TV) are US-owned and almost one in ten (9%) of all on-demand services in Europe belong to a US company. US TV channel portfolios are significantly larger than European ones, with 70% of channels in the top 10 TV groups owned by five US companies. It is due to the dissemination of a higher number of localized versions per one specific network, as opposed to the European broadcaster portfolios.

- A comparison of the top 50 TV and VOD players shows striking differences. European companies are better represented in VOD, with 80% of VOD services operated by the top 50 VOD groups, but only 51% of TV channels. It shows the diversity and volume of European VOD offerings with a variety of national players and niche topics, but it cannot offset the concentration created by the US market leaders.

Executive summary – II. Main players (by number of markets operated)

- Compared to 2023, the 20 biggest players in the media sector remain remarkably stable in terms of companies and market presence. Almost all of these companies were already in the top in the previous edition.

- US players all operate fully on the pan-European level, serving numerous European markets. Warner Bros. Discovery's brands such as Animal Planet, Cartoon Network, Discovery, Eurosport and MAX are virtually omnipresent with 45 European markets covered. Walt Disney, Amazon, Netflix, Comcast and Paramount all operate in 40 or more European markets. Overall, European players have lower market presences compared to Chinese, Japanese and US players.

- The top pan-European players are either multi-service players, like Comcast, active in both TV and VOD markets or single brand players, like Netflix or multi-service players, with a focus on on-demand markets. When branching out, top players build their on-demand presence in markets where they already have a TV presence.

- 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 French Vivendi, where typically a small number of countries serve as a basis to target various national markets with its brands Canal+ and Filmbox+. Warner Bros. Discovery, by contrast, applies a decentralised strategy where a larger number of establishment hubs serve the European markets to disseminate the Discovery, Eurosport and MAX brands.

- The most significant establishment for single-service streamers is Ireland. The country is used as an exclusive establishment hub by Chinese Huawei and US players Apple, Alphabet and Microsoft.

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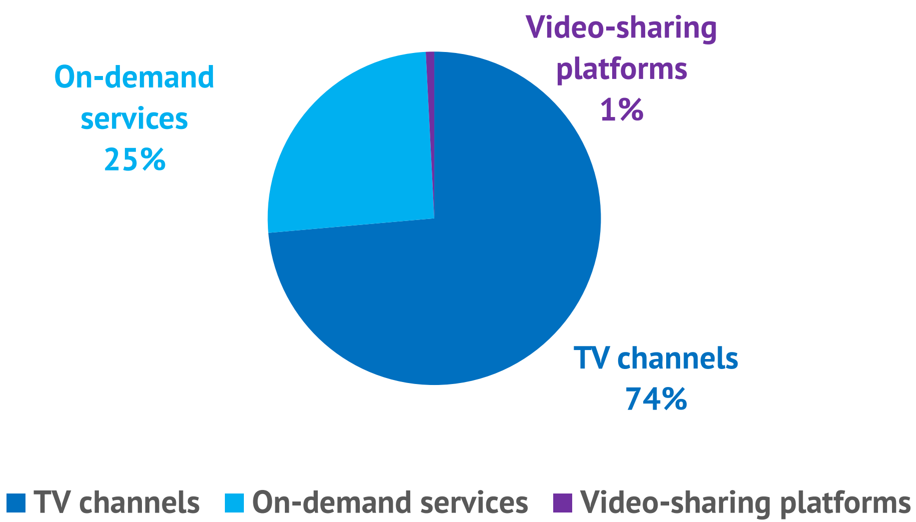
Part I. The big picture – AV media services and VSPs

The big picture – Audiovisual media services and VSPs

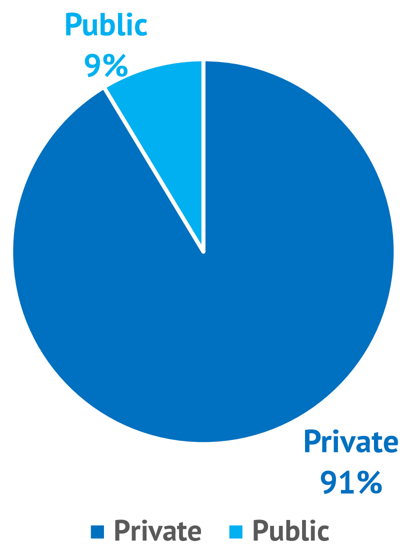
*Overall, there are 12 955 audiovisual media services and VSPs available in wider Europe (Dec. 2024).**

- **One in four services in Europe is an on-demand service or a video-sharing platform.**
- **Most audiovisual media services are privately owned, with 9% being publicly owned.**

Type of audiovisual media services and VSPs available in Europe | Dec. 2024 - In number of services and %



Ownership of audiovisual media services and VSPs available in Europe | Dec. 2024 - In number of services and %



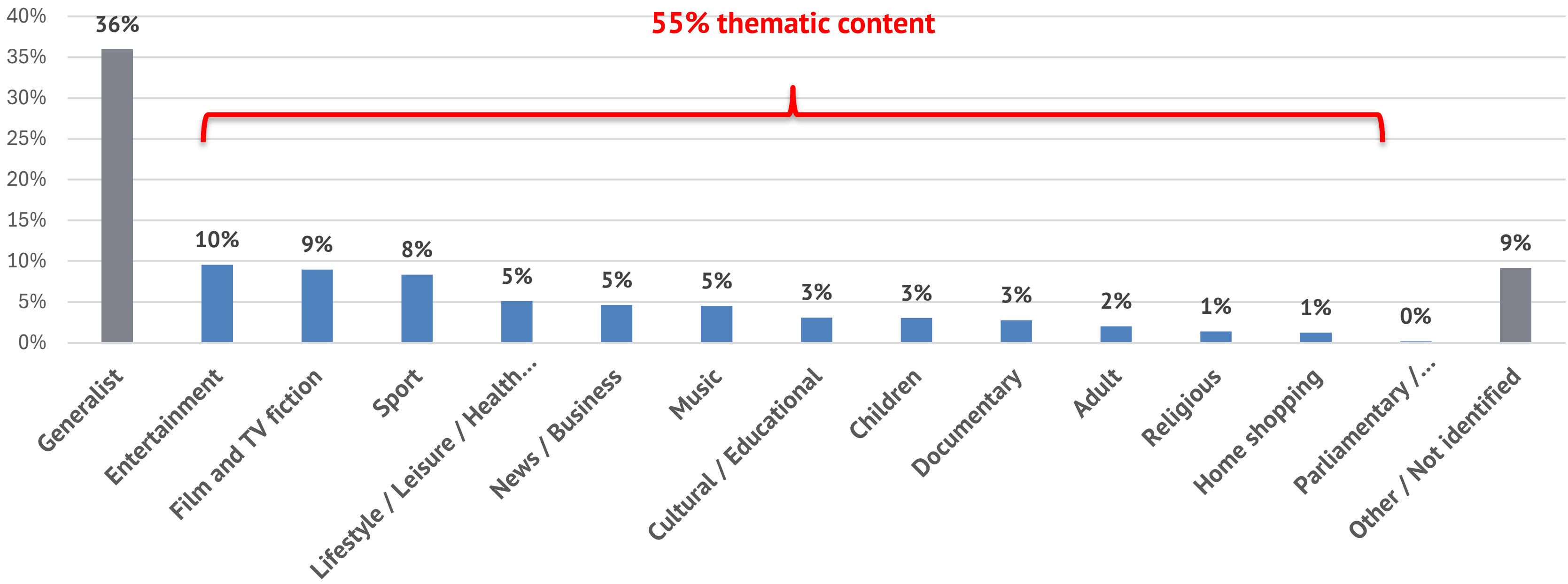
**For full list of definitions see scope and methodology section.*
Source: European Audiovisual Observatory / MAVISE

The big picture – Audiovisual media services and VSP content

More than half of audiovisual media services and VSPs have a thematic programming focus.

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

Percentage of audiovisual media services and VSPs available in Europe offering the following categories of content | Dec. 2024



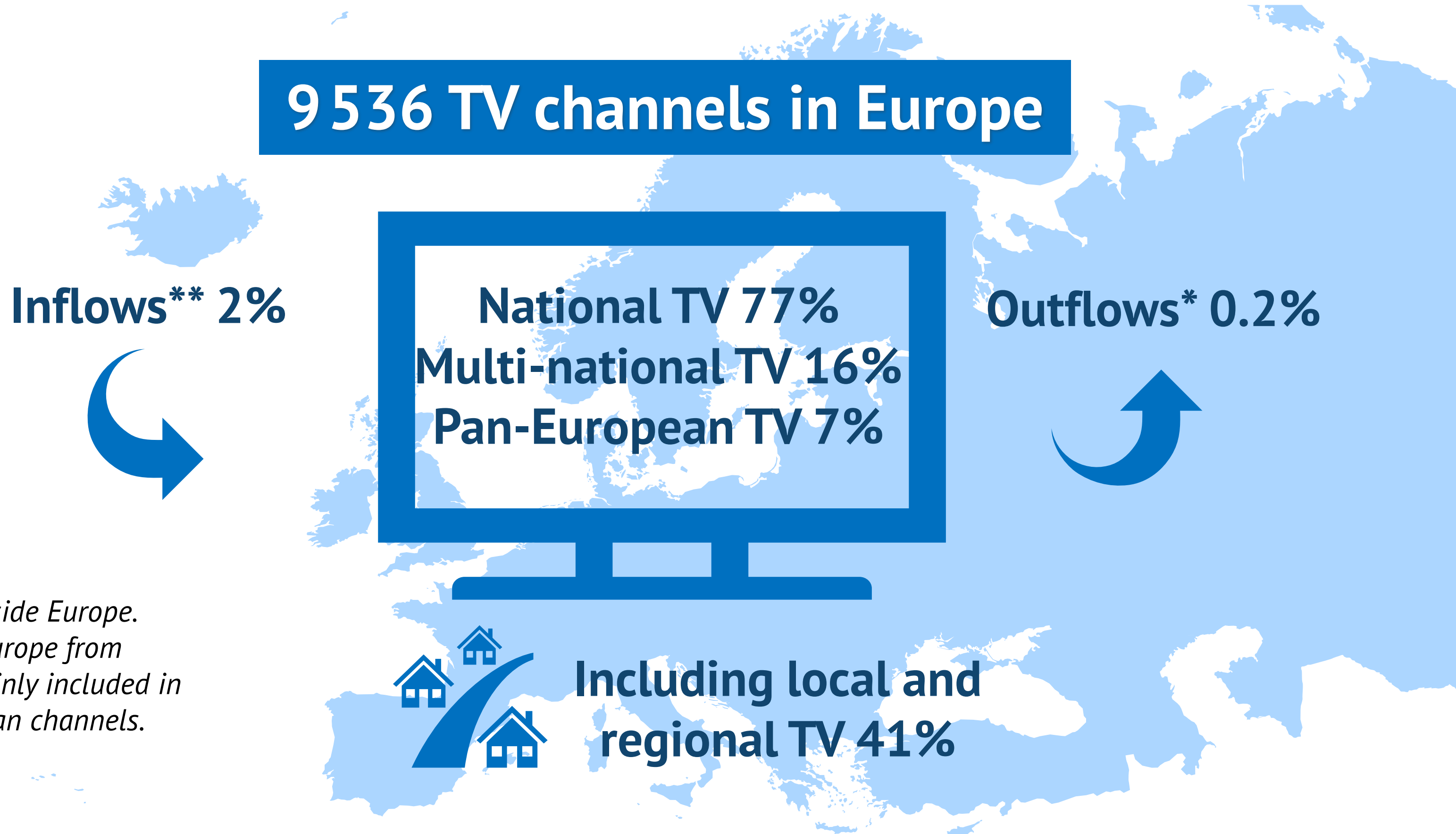
Source: European Audiovisual Observatory / MAVISE

The big picture – TV channels

The big picture – TV channels in Europe

Most TV channels in Europe exclusively serve national markets (77%).

- 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.

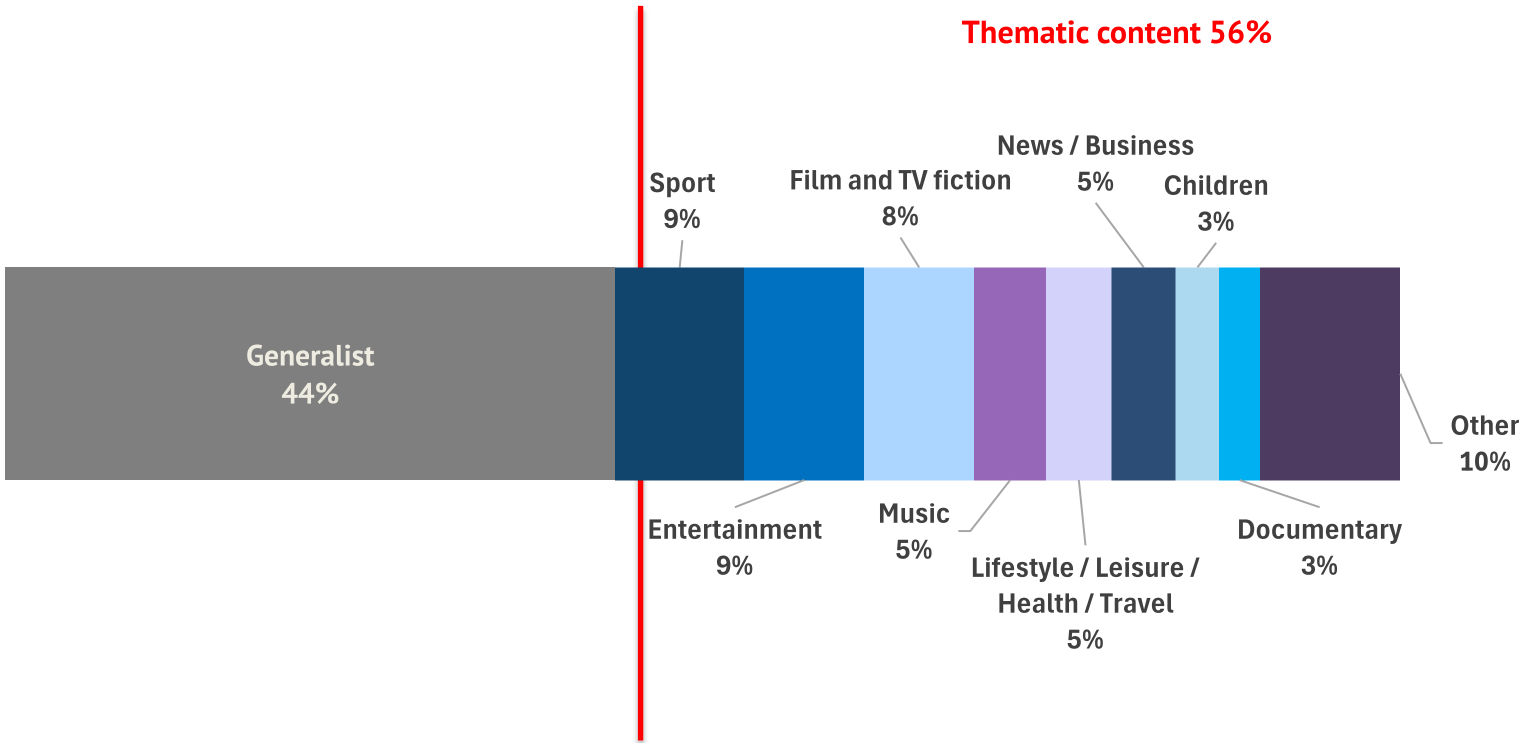
Source: European Audiovisual Observatory / MAVISE / Dec. 2024

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. 2024



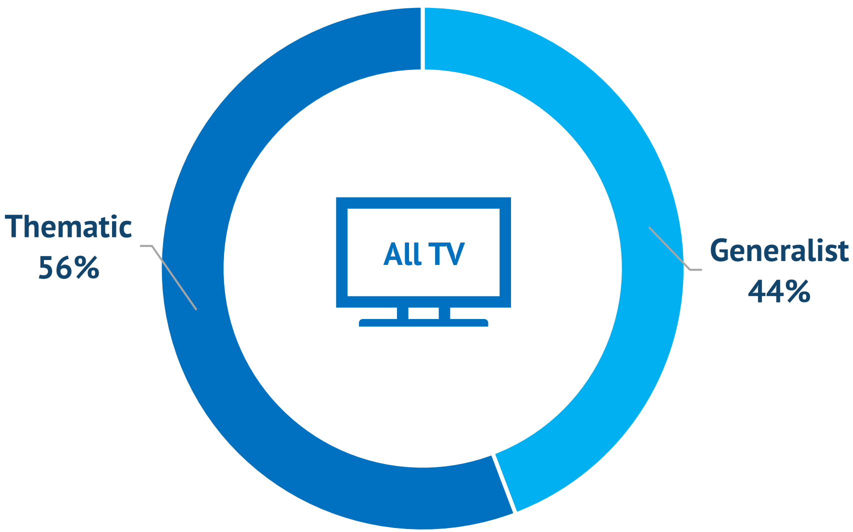
Source: European Audiovisual Observatory / MAVISE

The big picture – Local and regional TV channels

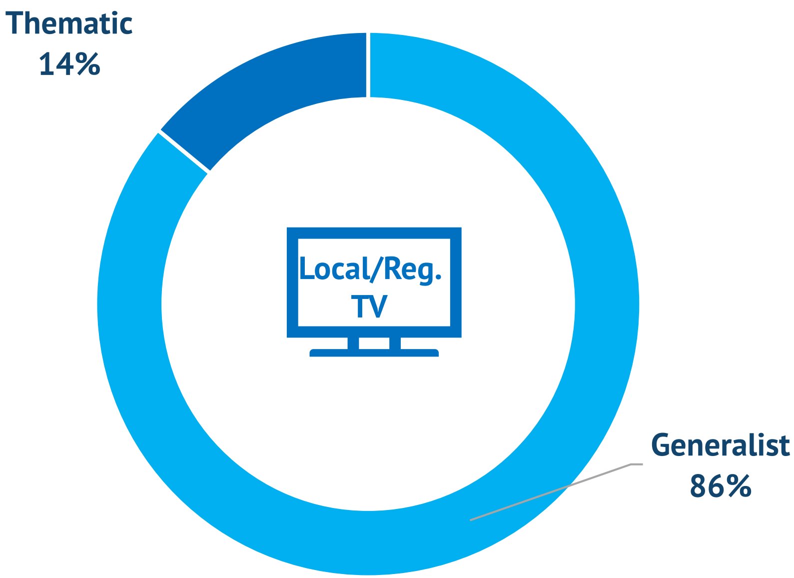
The great majority of local and regional TV channels in Europe has generalist programming.

- **Around nine out of 10 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. 2024



Percentage of local and regional TV channels offering the following categories of content | Dec. 2024



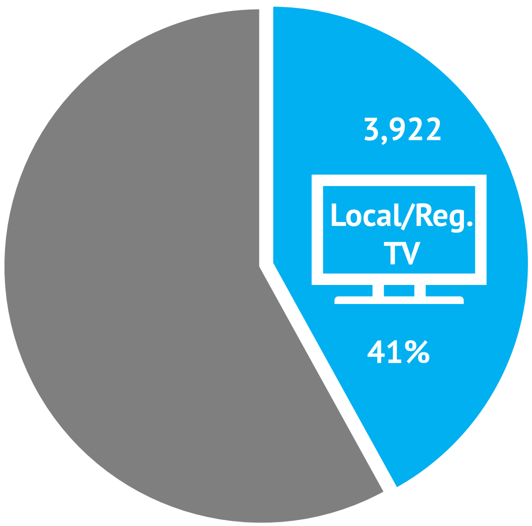
Source: European Audiovisual Observatory / MAVISE

The big picture – Local and regional TV channels

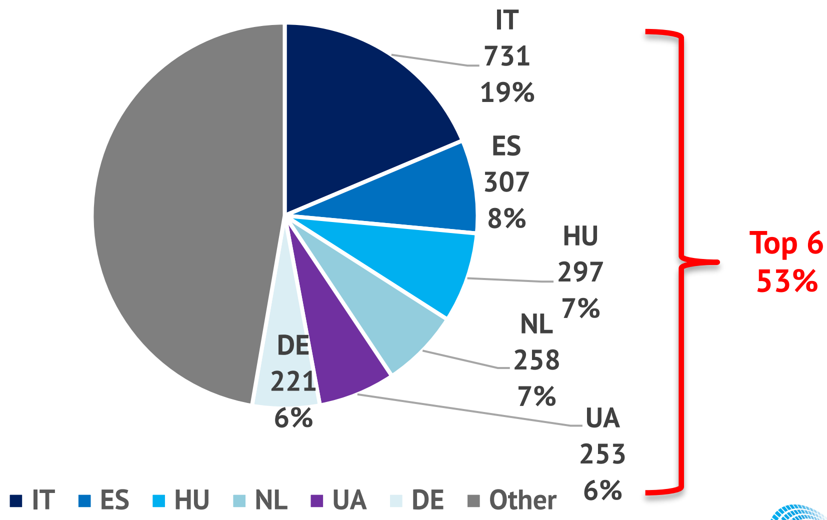
The European television sector is characterised by a significant share of local and regional TV services.

- Local and regional TV makes up 41% of the overall number of TV channels in Europe.
- Six countries account for more than half of all local TV channels.
- Around 70% of the Italian AV market is local channels - the equivalent of 19% of all local and regional channels in Europe.

Share of local and regional TV channels available in Europe | Dec. 2024 - In number of services and %

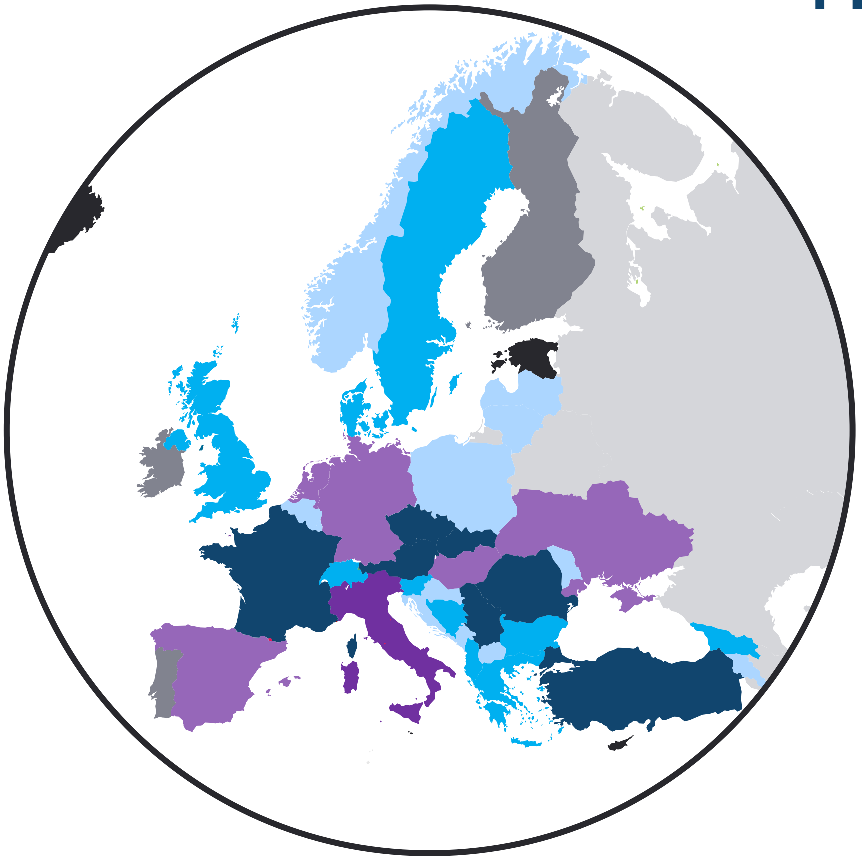


Breakdown of local and regional TV by country | Dec. 2024 - In number of services and %



Source: European Audiovisual Observatory / MAVISE

Map of local and regional TV



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

- > 700: IT
- > 200: ES, HU, NL, UA, DE
- > 100: CZ, TR, AT, RS, RO, SK, FR
- 30-99: GR, CH, GE, BA, GB, AL, DK, SI, SE, BG
- 10-29: AM, NO, MK, BE, LT, PL, HR, LV, LU, ME, MD
- >10: FI, IE, PT, LI
- None: EE, CY, IS, MT

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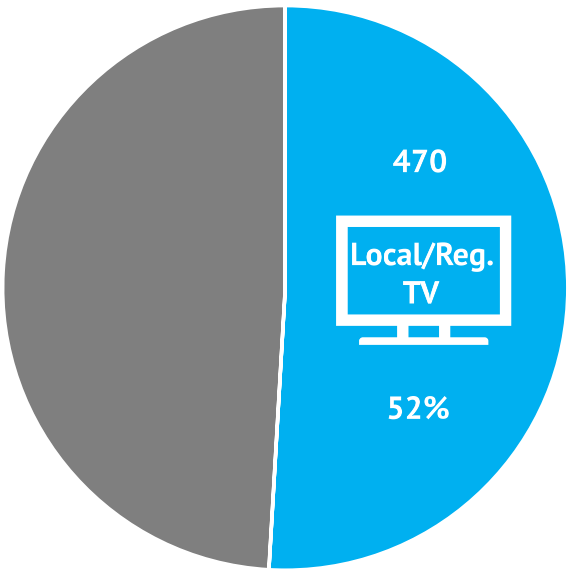
Map of Europe © Copyright Showeet.com
Source: European Audiovisual Observatory / MAVISE / Dec. 2024

The big picture – Public local and regional TV channels

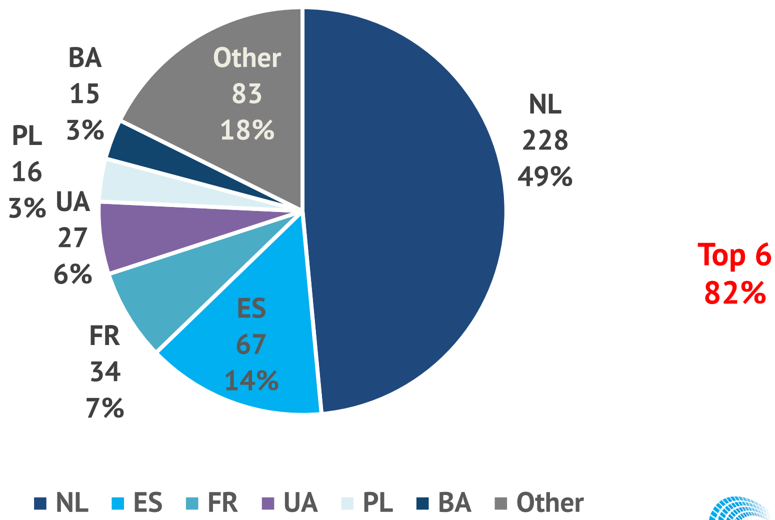
Half of all public service TV channels are local and regional services.

- **Public local and regional channels are most prominent in the Netherlands and Spain, accounting for almost two thirds of all public local and regional channels in Europe.**
- **The availability of public channels serving local and regional audiences differs widely across Europe, ranging from more than 200 in the Netherlands to fewer than ten in 14 European countries.**

Share of local and regional channels among public TV | Dec. 2024 - In number of services and %



Breakdown of public local and regional TV by country | Dec. 2024 - In number of services and %



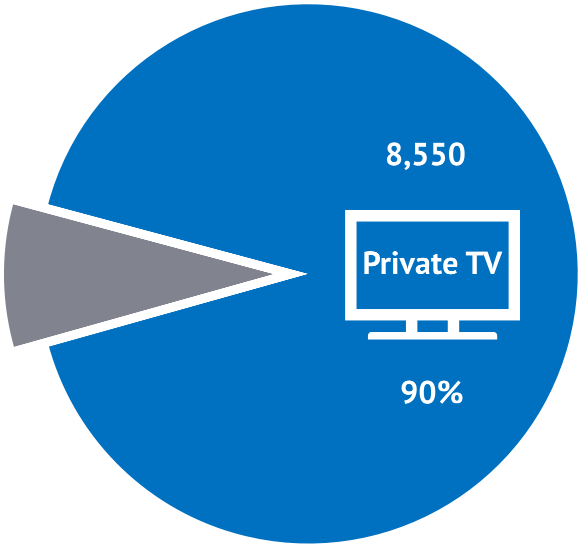
Source: European Audiovisual Observatory / MAVISE

The big picture – Private TV channels

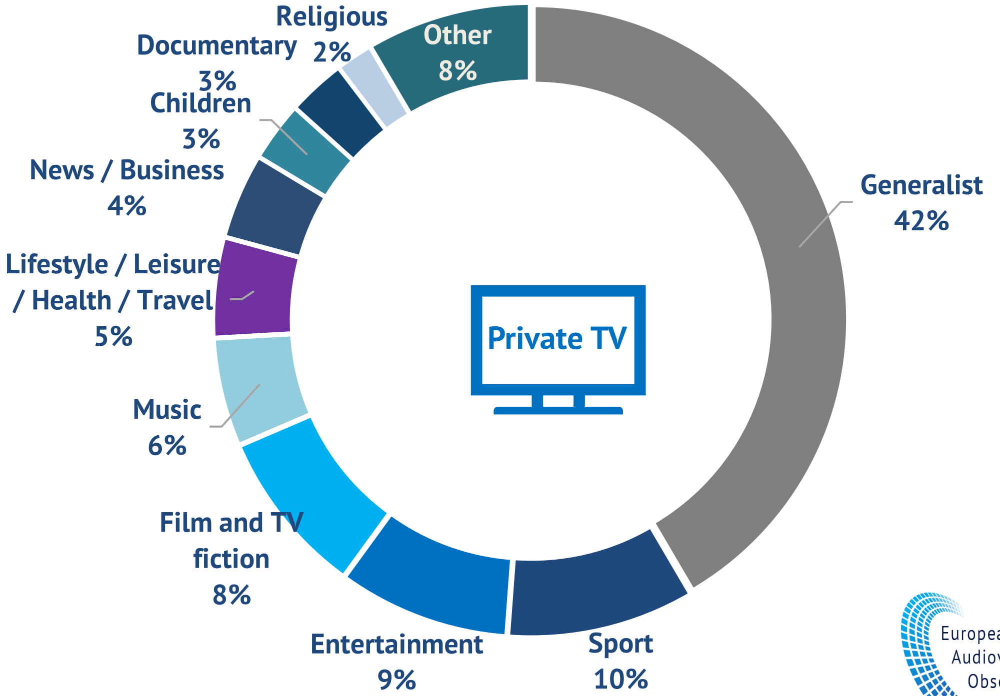
The great majority of TV channels in Europe are private.

- **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. 2024 - In number of services and %



Percentage of private TV channels offering the following categories of content | Dec. 2024



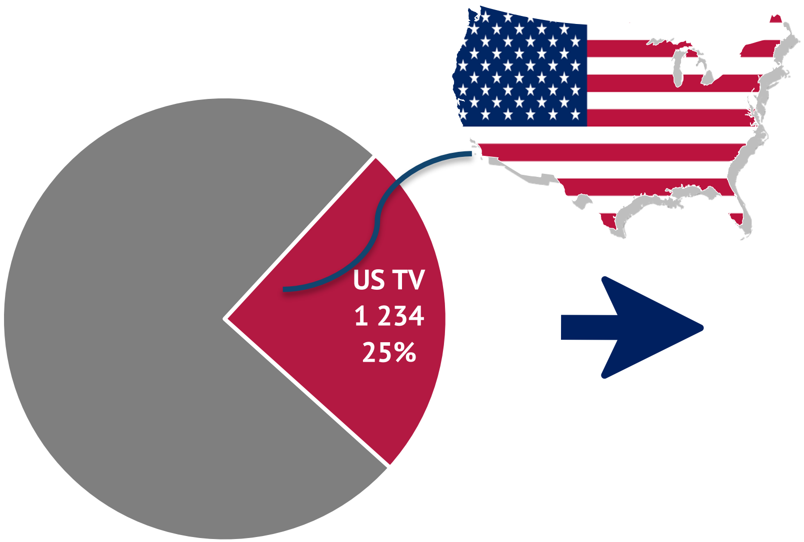
Source: European Audiovisual Observatory / MAVISE

The big picture – US share among private TV channels

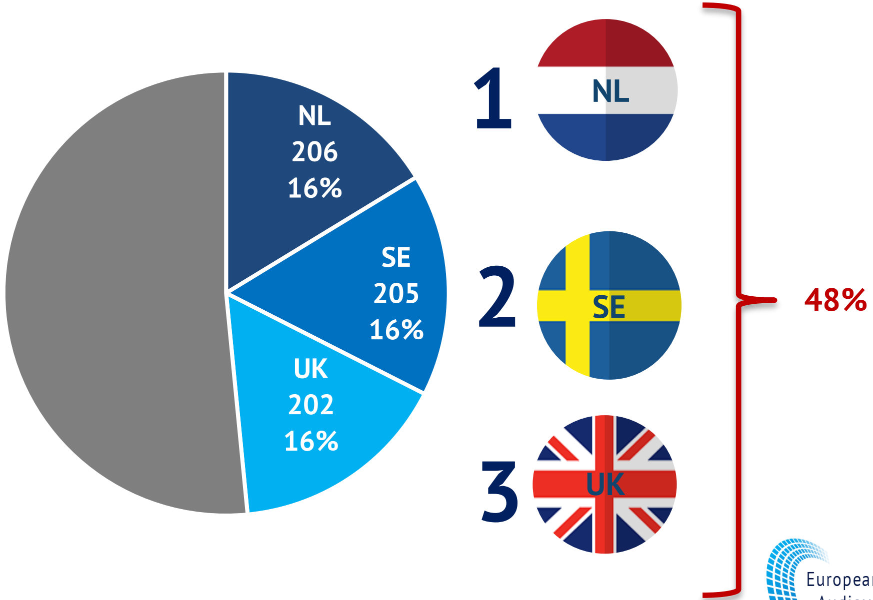
Around one in four private TV channels in Europe is US-owned.

- **Around half of all private US-owned TV channels are based in three 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. 2024 - In number of services and %



Breakdown of US-owned private TV by country of origin | Dec. 2024 - In number of services and %



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

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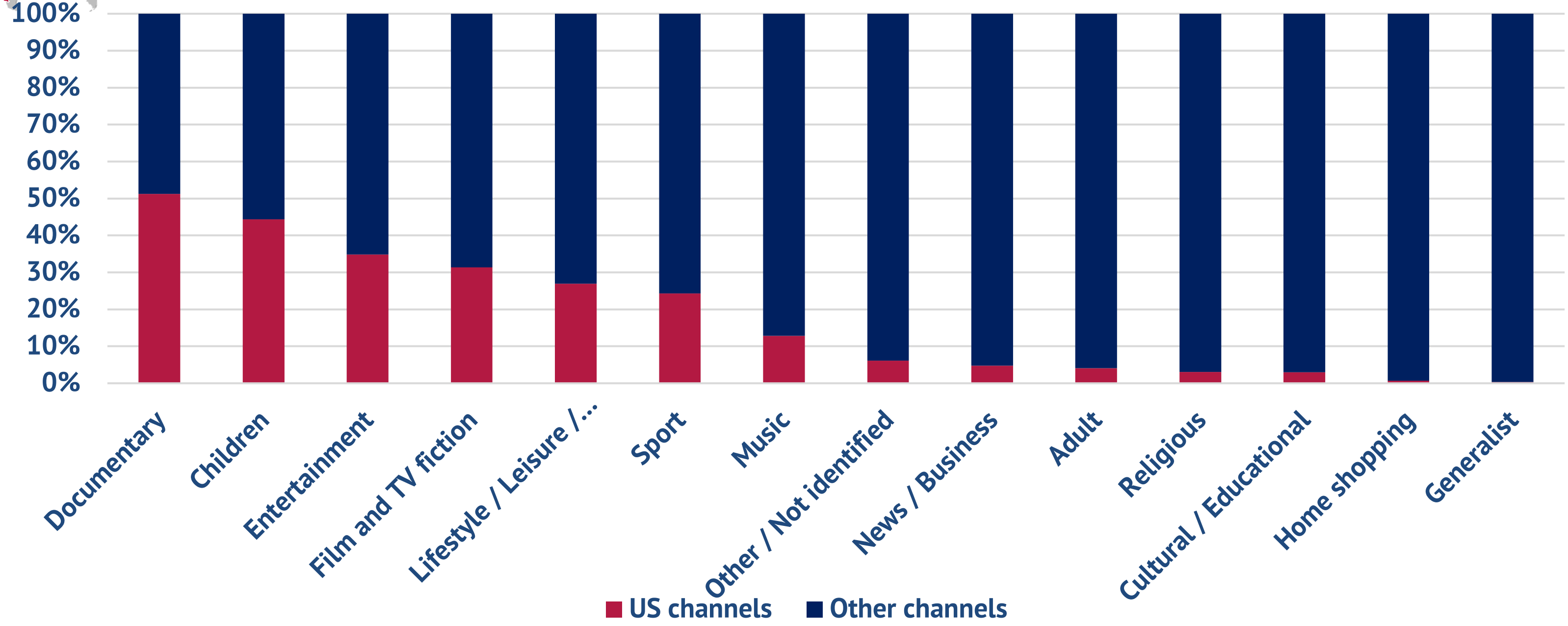
Source: European Audiovisual Observatory / MAVISE

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. 2024 - In %



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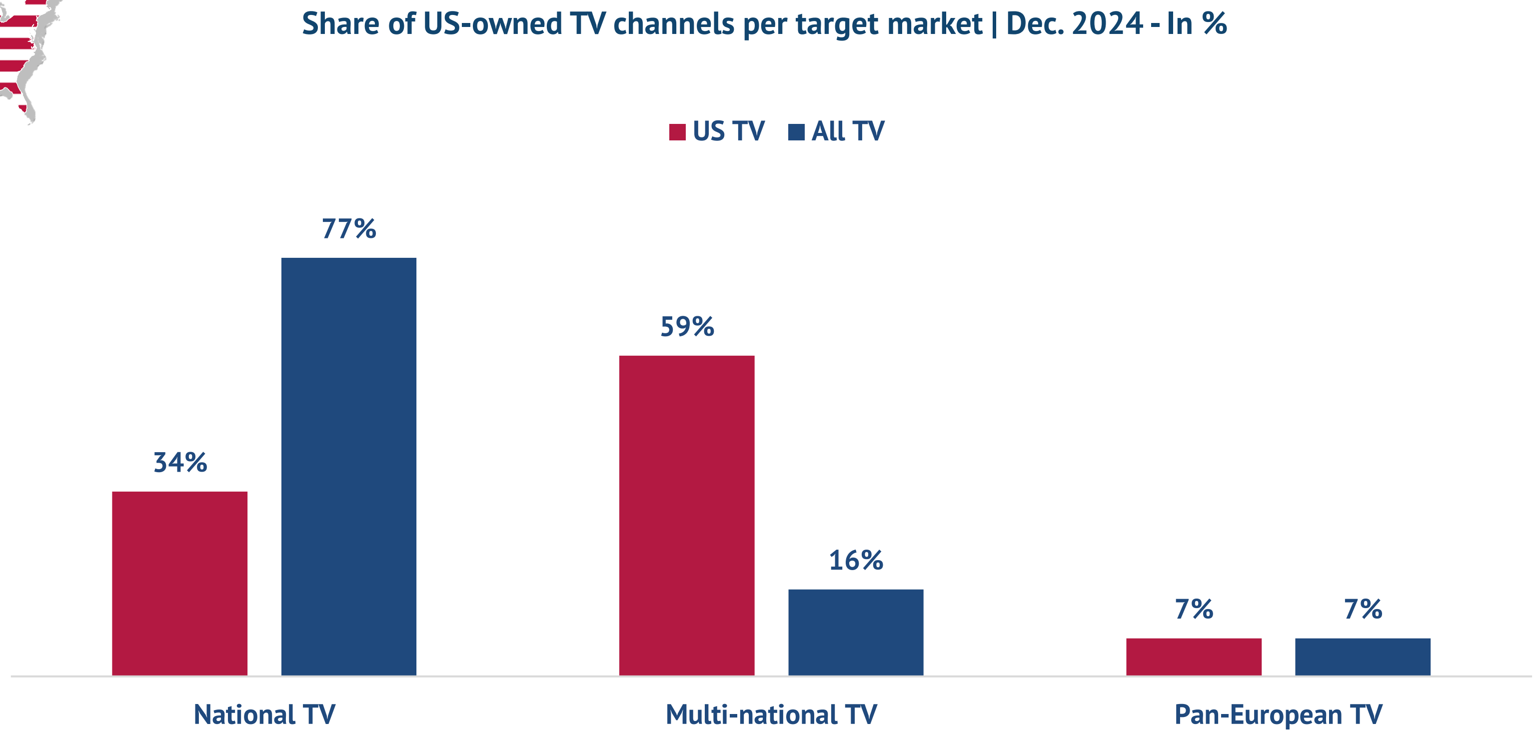
The big picture – Markets targeted by US TV channels

US networks are overrepresented among multi-national TV channels.

- **US channels serve markets predominantly as multi-national services.**
- **US channels are mainly distributed via cable, satellite and IPTV.**
- **Availability on DTT networks is the exception (6%).**



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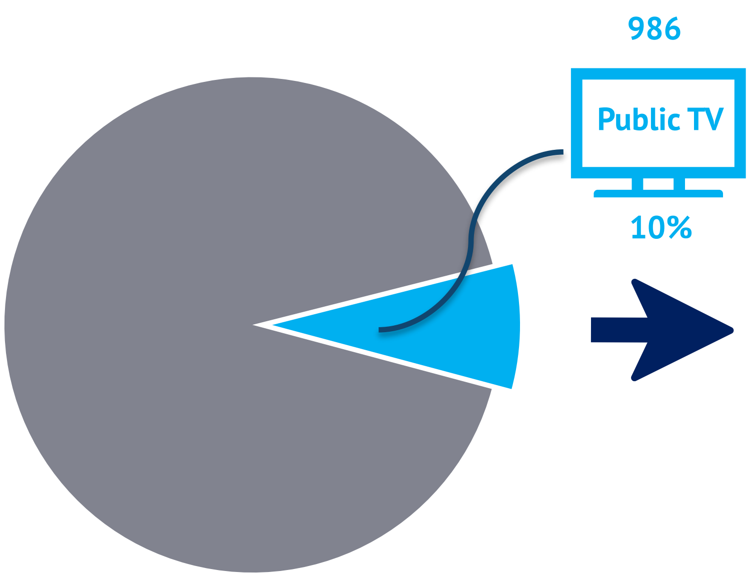
The big picture – Public TV channels

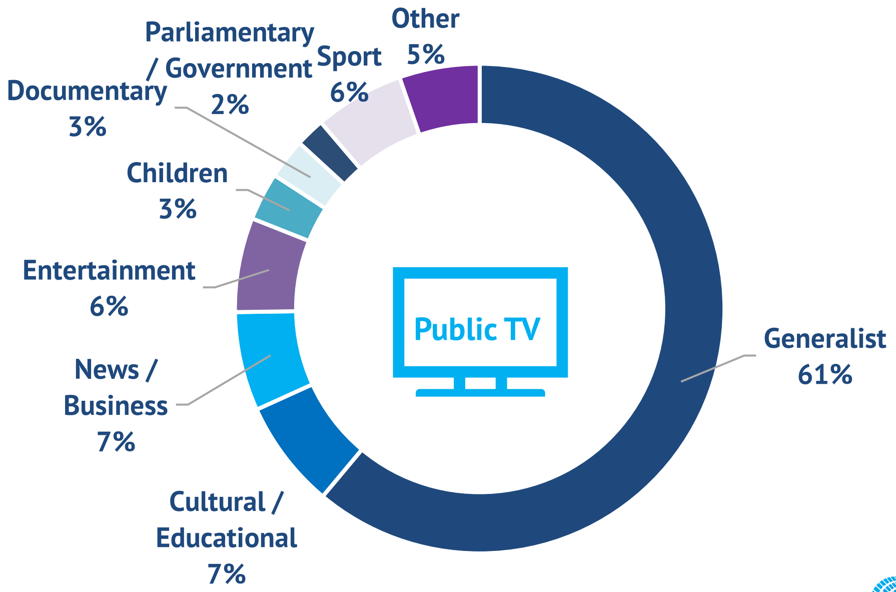
One in 10 TV channels in Europe is public.

- **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. 2024 - In number of services and %



Percentage of public TV channels offering the following categories of content | Dec. 2024



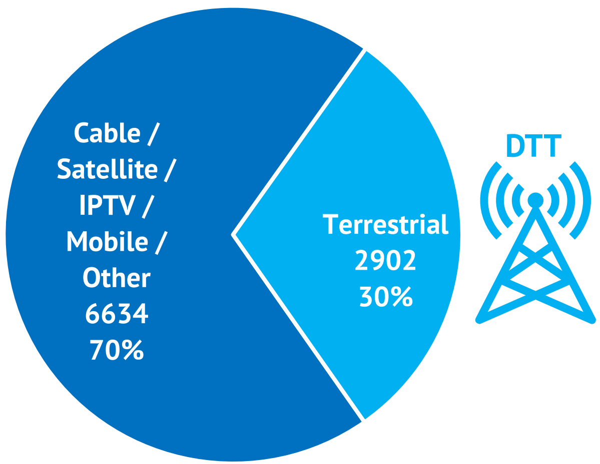
Source: European Audiovisual Observatory / MAVISE

The big picture – TV channel networks

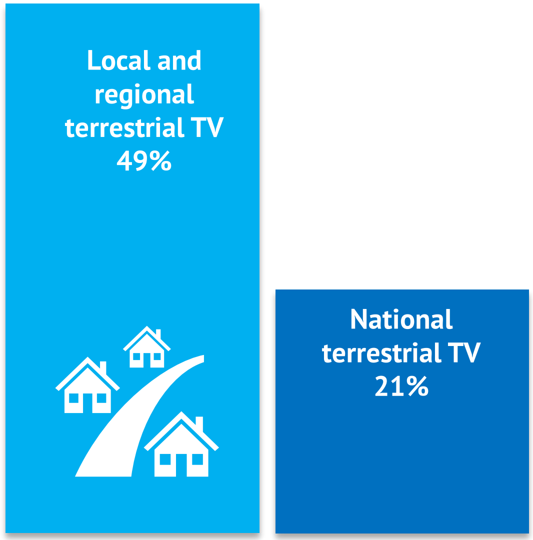
Around one in three TV channels in Europe is available on digital terrestrial networks.

- **30% 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 49% of local and regional TV channels are available on DTT networks, compared to 21% of national TV services.**

Breakdown of all TV channels by network type | Dec. 2024 - In number of services and %



Share of local and regional and national TV on terrestrial networks | Dec. 2024 - In %



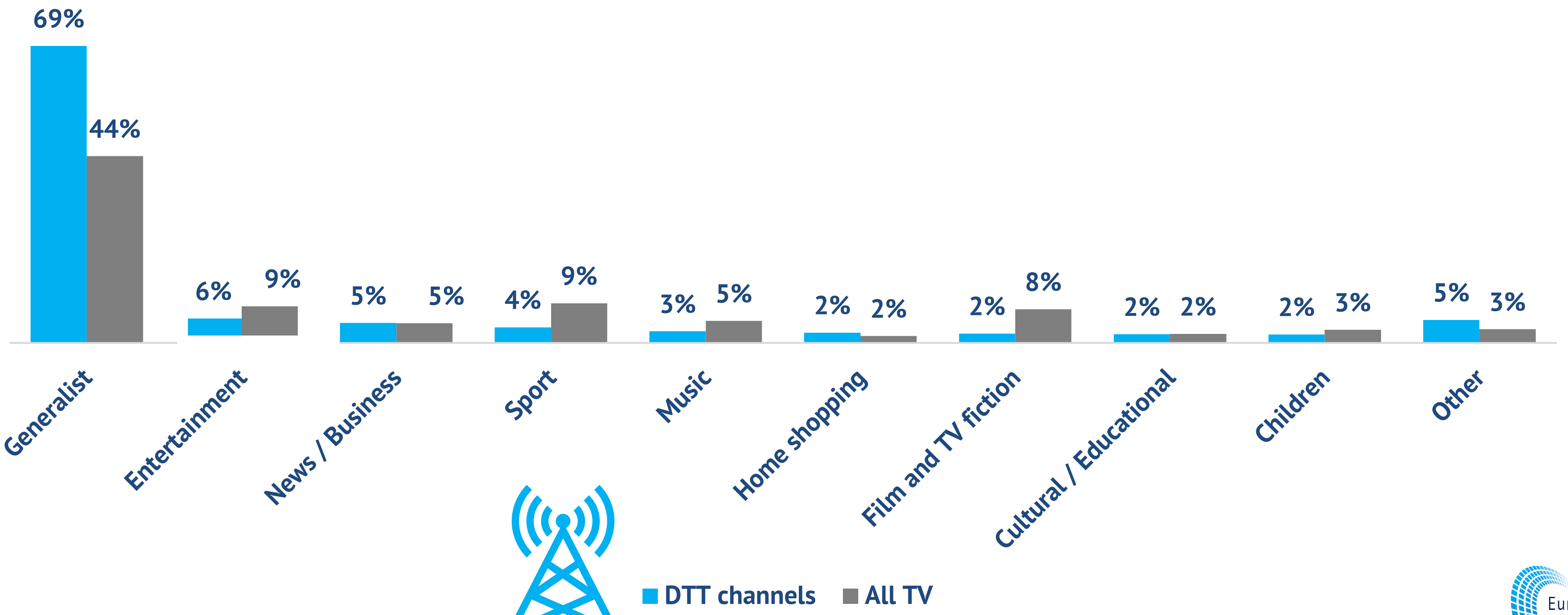
Source: European Audiovisual Observatory / MAVISE

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. 2024

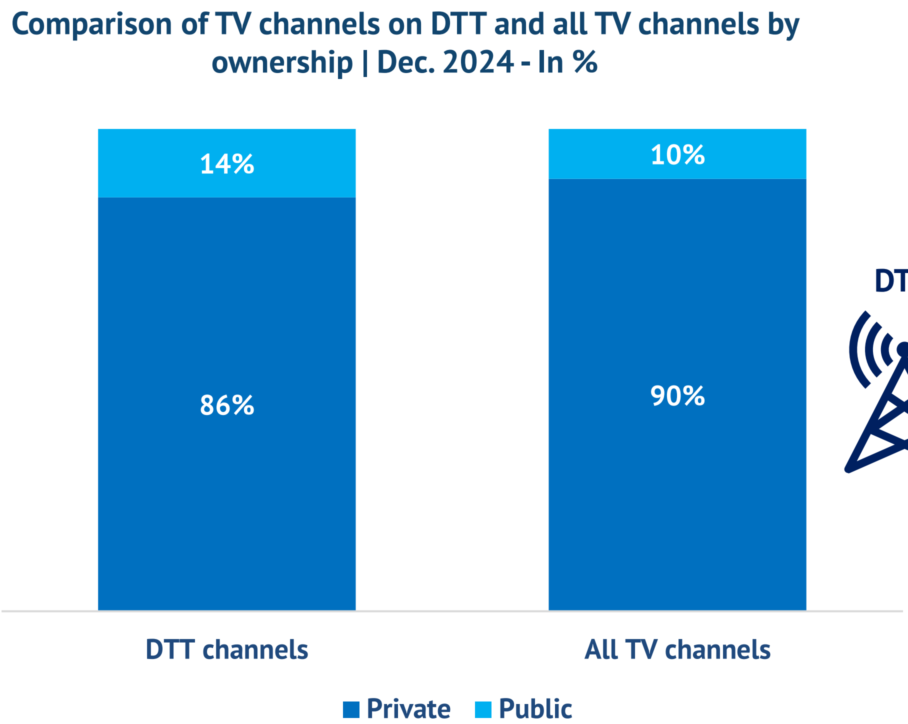


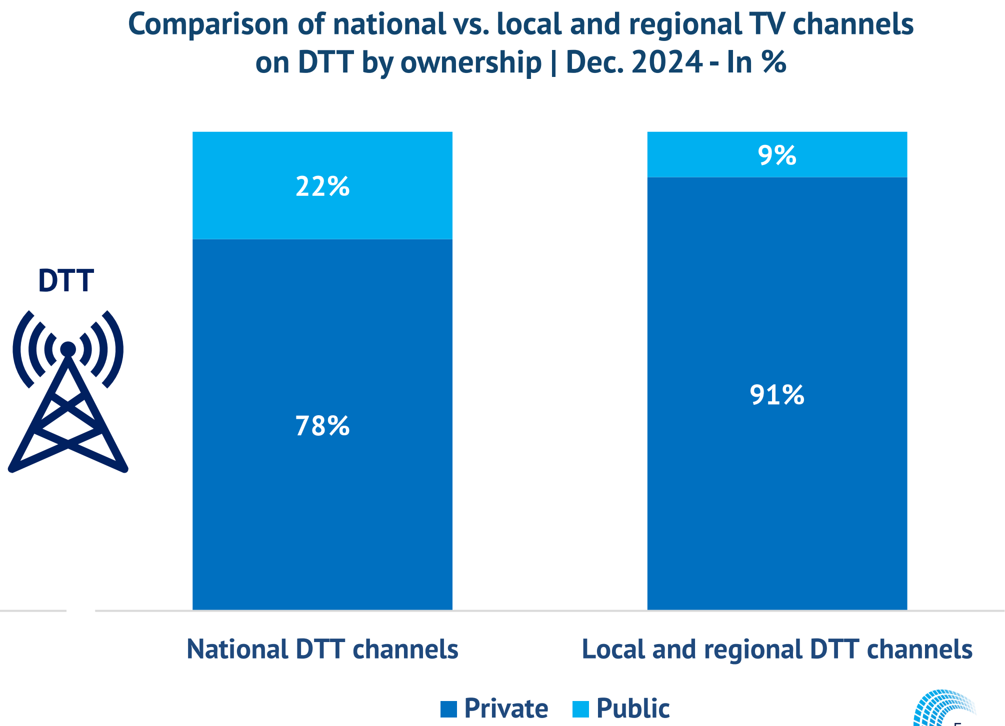
Source: European Audiovisual Observatory / MAVISE

The big picture – DTT channel ownership

Around one in five TV channels available on DTT networks is publicly owned.

- The share of publicly owned TV channels distributed on DTT networks is slightly higher than the share of publicly owned TV channels available overall in Europe.
- There are more national public TV channels available on DTT networks than public local and regional TV.





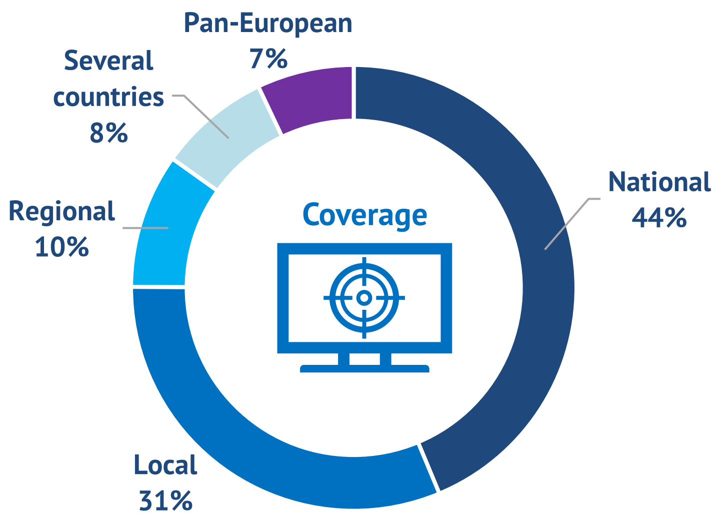
Source: European Audiovisual Observatory / MAVISE

The big picture – TV channel coverage

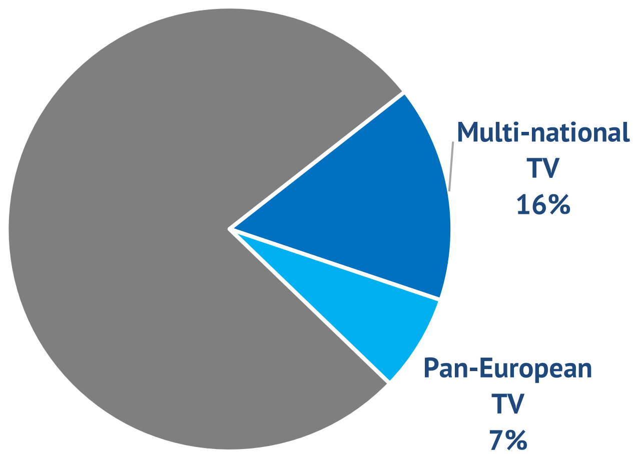
The majority (85%) of TV channels in Europe primarily serves national markets.

- **There are almost as many TV channels with local and regional coverage as there are with national coverage.**
- **Around 16% of all TV channels in Europe serve multi-national markets and another 7% are pan-European TV services.**

Breakdown of TV channels by coverage | Dec. 2024 – In %



Share of multi-national* and pan-European TV channels by target markets | Dec. 2024 - In %



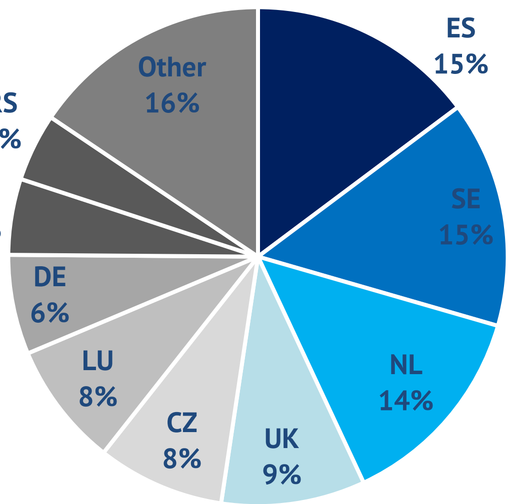
* *Multi-national TV channels are those targeting at least one specific market outside the country of establishment.*
Source: European Audiovisual Observatory / MAVISE

The big picture – Multi-national TV channel hubs

There are 1 503 TV channels in Europe exclusively targeting multi-national markets.

- **Four countries account for 50% of multi-national TV channels. They include Spain, Sweden, the Netherlands and the United Kingdom.**
- **Czechia and Luxembourg are significant hubs for European multi-national TV channel networks.**

Main hubs for multi-national TV channels | Dec. 2024 - In %



Examples of multi-national TV networks based in top 3 hubs | Dec. 2024

1

US: AMC Networks (AMC TV, JimJam), Comcast (E! Entertainment, Syfy), Disney (Disney Junior, FX, National Geographic)
EUR: Vivendi (Filmbox), Rakuten (RTV)

2

US: Paramount (MTV, Pluto TV)
EUR: Viaplay Group (TV3, V Sport, V Film)

3

US: Paramount (Comedy Central), Warner Bros. Discovery (Animal Planet, Discovery Channel, Food Network, HGTV, ID, TLC, Travel Channel)
EUR: Antenna Group (AXN), BBC (BBC Earth)

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Source: European Audiovisual Observatory / MAVISE

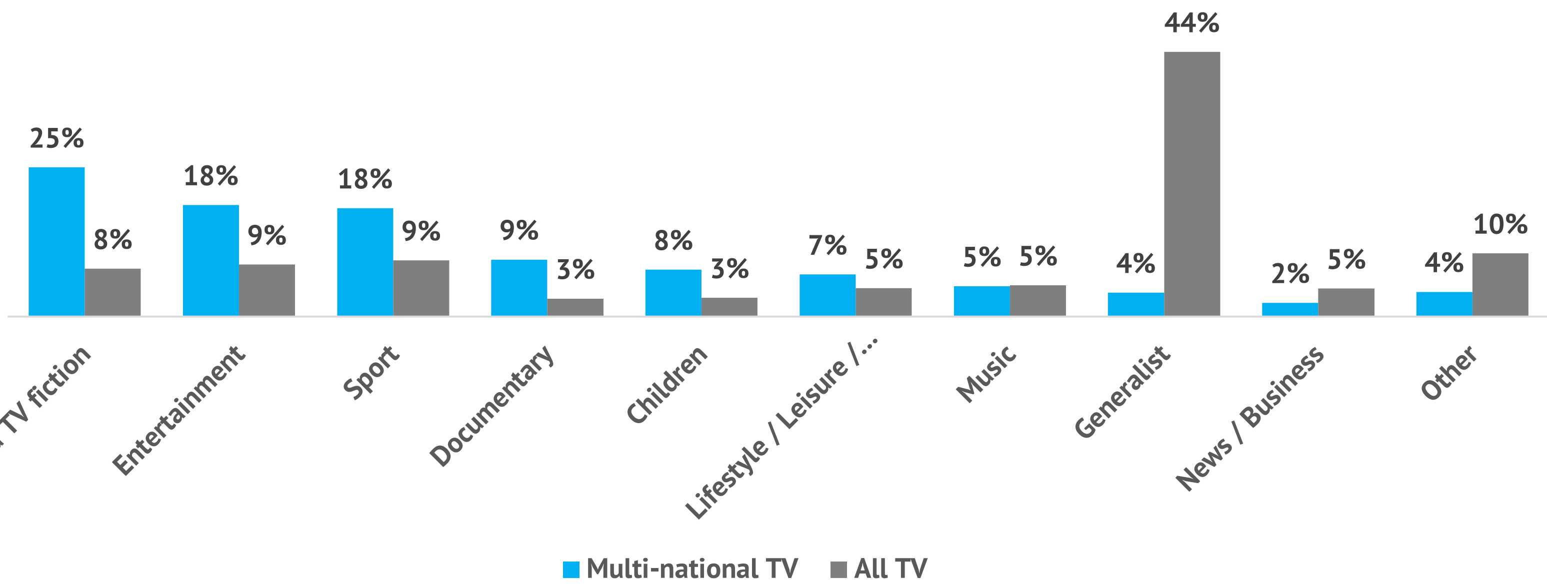
European Audiovisual Observatory

The big picture –Multi-national TV channel programming

The programming content of multi-national TV channels is almost entirely thematic.

- **Multi-national TV channels focus on film and TV fiction, entertainment and sport content.**
- **Examples of multi-national 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 multi-channel TV channels offering the following categories of content | Dec. 2024



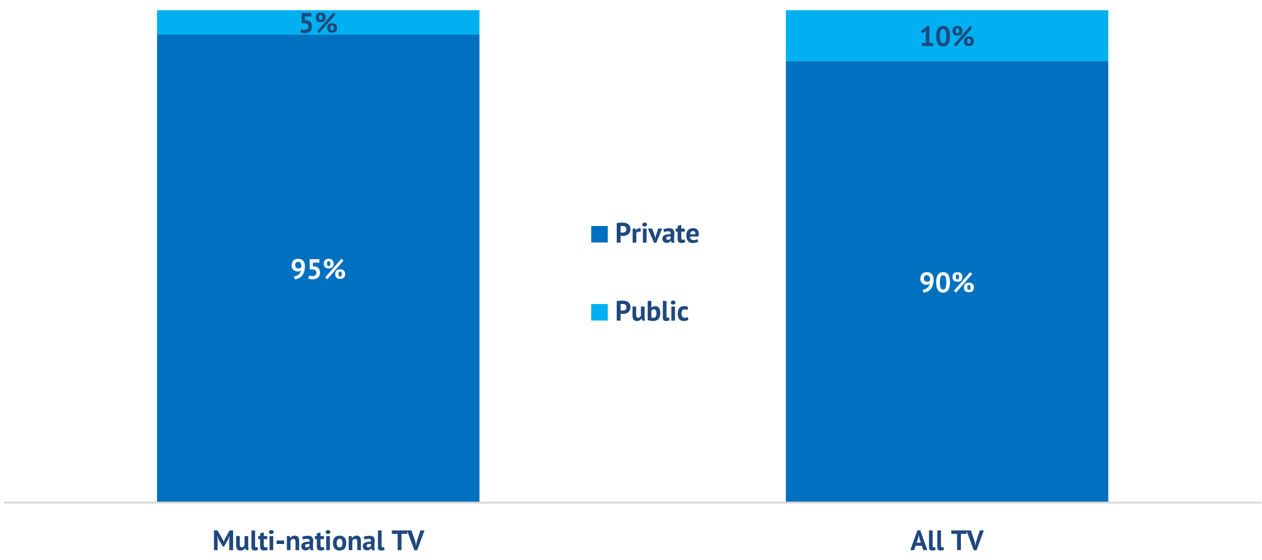
Source: European Audiovisual Observatory / MAVISE

The big picture – Ownership of multi-national TV channels

Multi-national TV channels are predominantly in private ownership.

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

Breakdown of multi-national TV channels by ownership | Dec. 2024 - In %



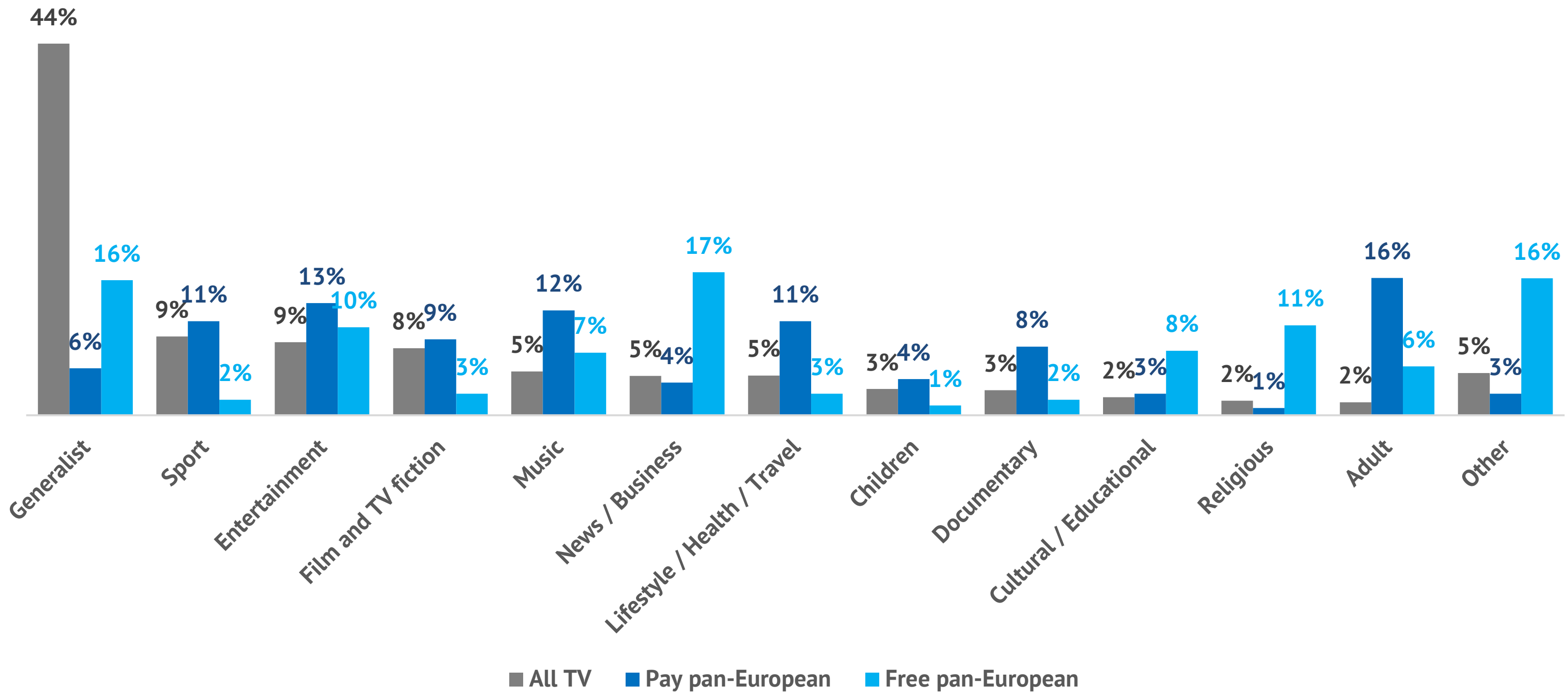
Source: European Audiovisual Observatory / MAVISE

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

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

- **65% 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. 2024



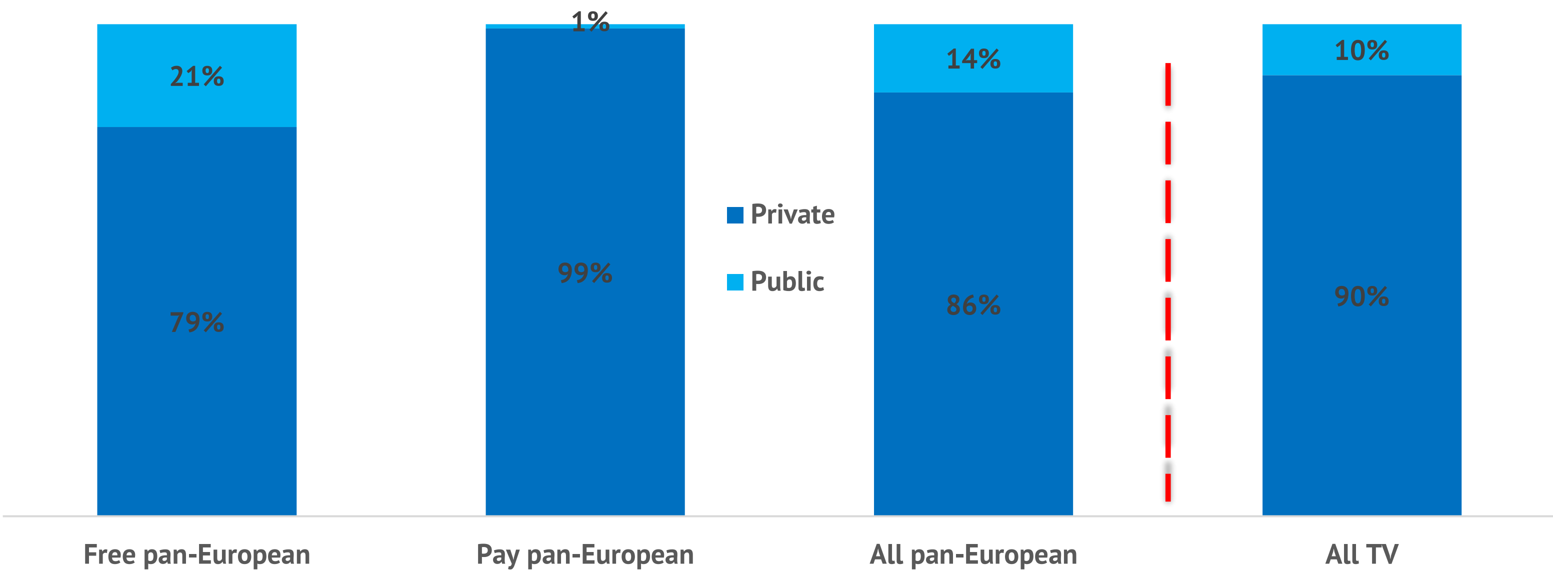
Source: European Audiovisual Observatory / MAVISE

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

Breakdown of pan-European TV channels by ownership | Dec. 2024 - In %



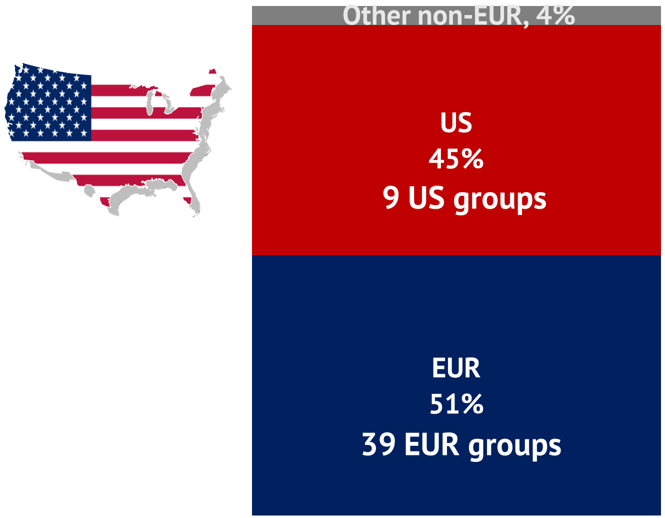
Source: European Audiovisual Observatory / MAVISE

The big picture – TV channels operated by top 50 TV players

One in two TV channels operated by the top 50 TV players has a non-European parent company.*

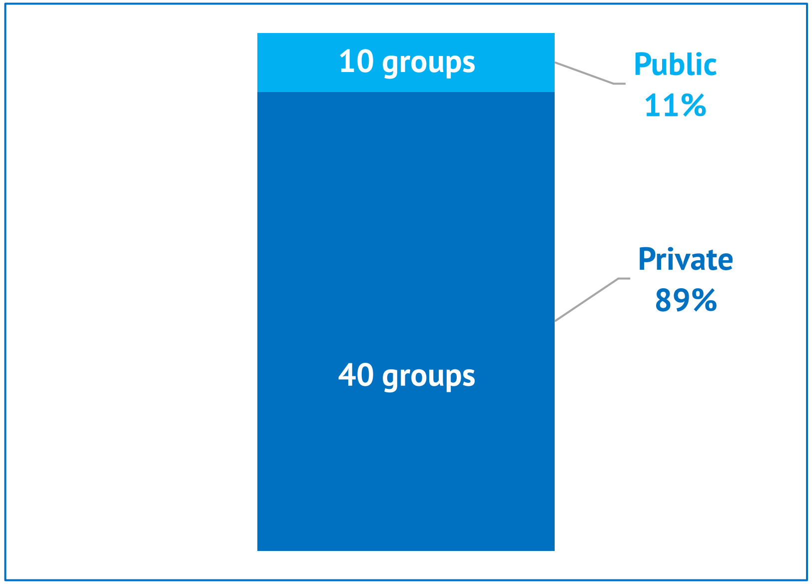
- Nine US players operate the majority (45%) of TV channels with a non-European parent company.
- The top public service broadcasters hold their ground regarding the volume of TV channels operated. Ten public broadcasters operate 11% of TV channels among the top 50 TV players.

Breakdown of TV channels operated by top 50 TV groups by region of final owner | Dec. 2024 - In %



Region of parent company

Breakdown of TV channels operated by top 50 TV groups by ownership | Dec. 2024 - In %



Ownership

*Top 50 TV players ranked by number of TV channels operated.

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The big picture– Ownership of top 10 TV players

At top player level, the supply of TV channels in Europe is very concentrated.

- **US players Warner Bros. Discovery and Paramount have by far the biggest TV channel portfolios among the top 10 TV groups active in Europe.**

Top 10 TV players by number of services | Dec. 2024

Rank	Company	Ownership	# TV
1	Warner Bros. Discovery (US)	Private	369
2	Paramount (US)	Private	326
3	Comcast (US)	Private	178
4	The Walt Disney Company (US)	Private	135
5	Groupe Canal Plus (FR)	Private	134
6	United Group (CZ) / BC Partners (UK)	Private	118
7	Telekom Srbija (RS) / Government of Serbia	Public	73
8	Rakuten Inc (JP)	Private	68
9	AMC Networks Inc (US)	Private	68
10	Pink Media Group (RS)	Private	62

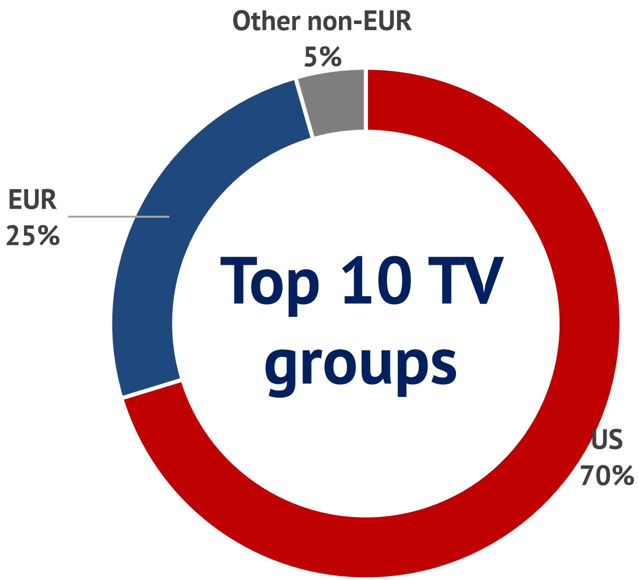
Source: European Audiovisual Observatory / MAVISE

The big picture– US share among top 10 TV players

TV channel portfolios of US players outsize those of European competitors.

- Despite an almost equal number of US-owned TV groups and those with a European parent company in the top 10, US channel portfolios are more than twice the size of European ones.
- 70% of TV channels in the top 10 TV groups belong to five US parent companies.
- The top 10 TV groups in Europe represent 16% of the total TV channel offering in Europe.

US share among top 10 TV groups TV channel portfolio | Dec. 2024 - In number of services and %



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Source: European Audiovisual Observatory / MAVISE

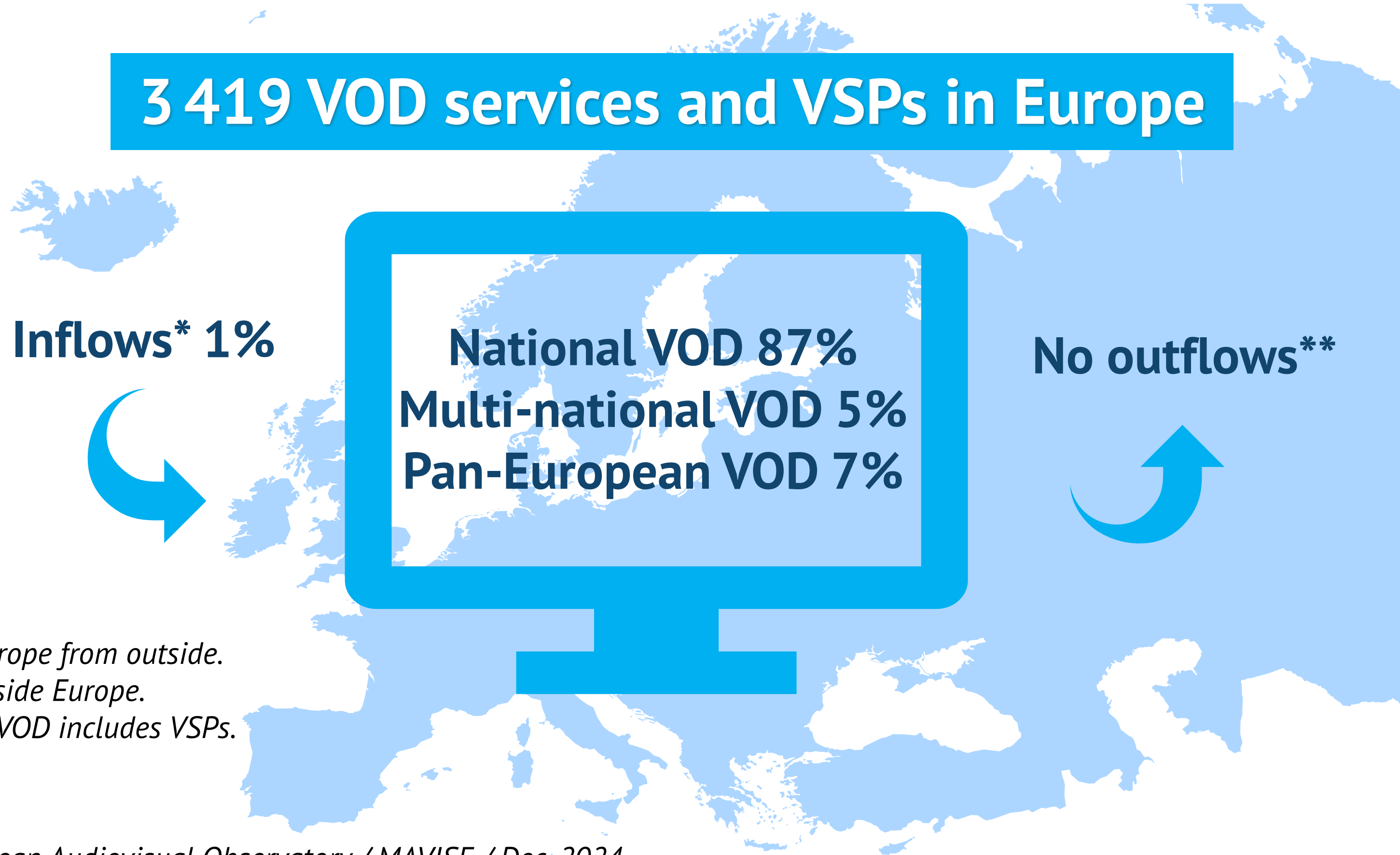
European Audiovisual Observatory

The big picture – VOD services and VSPs

The big picture – VOD services and VSPs in Europe

Most VOD services and video-sharing platforms in Europe exclusively serve national markets (87%).

- **Video-on-demand services and VSPs targeting Europe from outside make up just 1%.**
- **Conversely, there are no VOD or VSP exports out of Europe.**



** Targeting Europe from outside.*
*** Exports outside Europe.*
References to VOD includes VSPs.

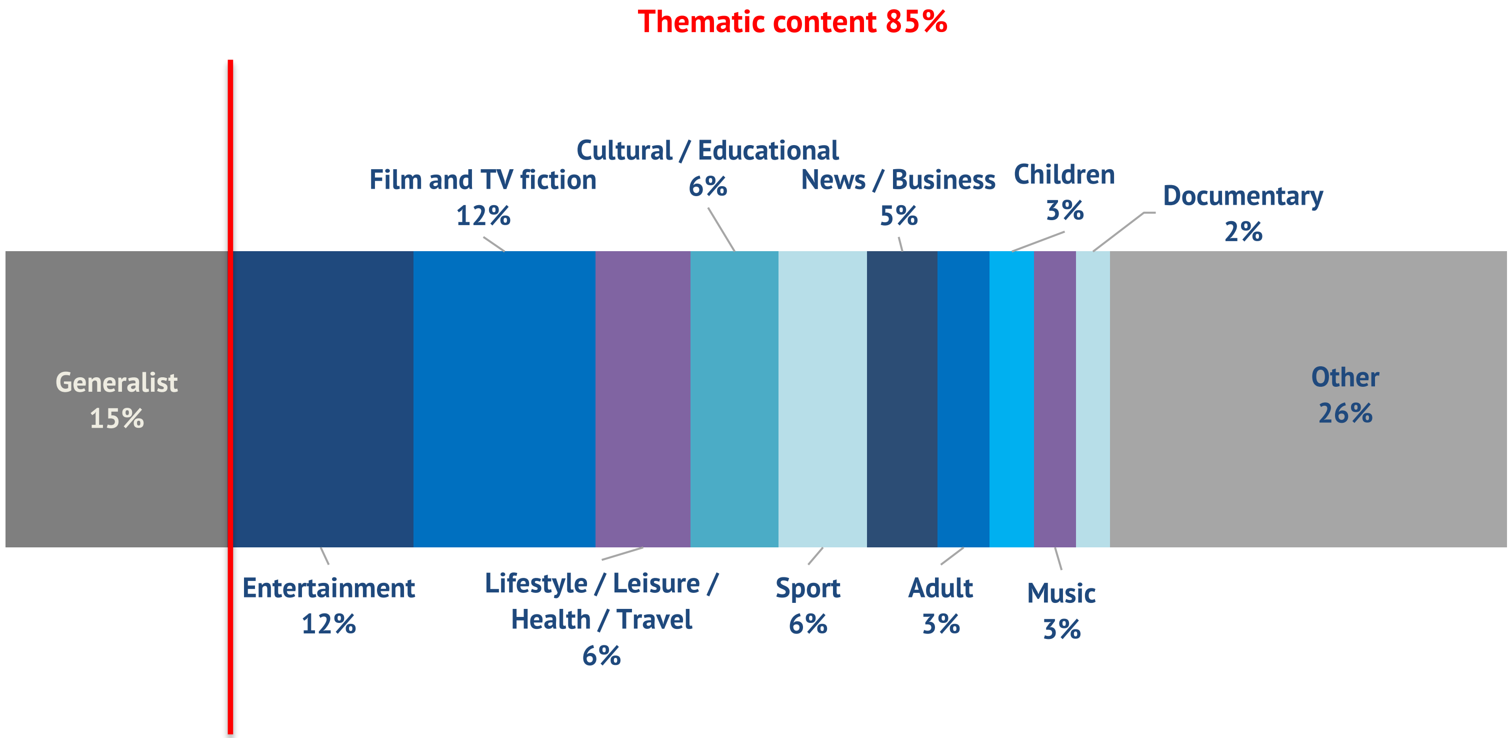
Source: European Audiovisual Observatory / MAVISE / Dec. 2024

The big picture – VOD services and VSP content

VOD services and VSPs in Europe still offer primarily film and TV fiction and entertainment programming.

- **Increasingly, the programming content of VOD services and VSPs previously concentrated on film and TV fiction is becoming more diverse (e.g., children and reality TV). Entertainment is now the first thematic genre slightly ahead of film and TV fiction.**

Percentage of VOD services and VSPs offering the following categories of content | Dec. 2024



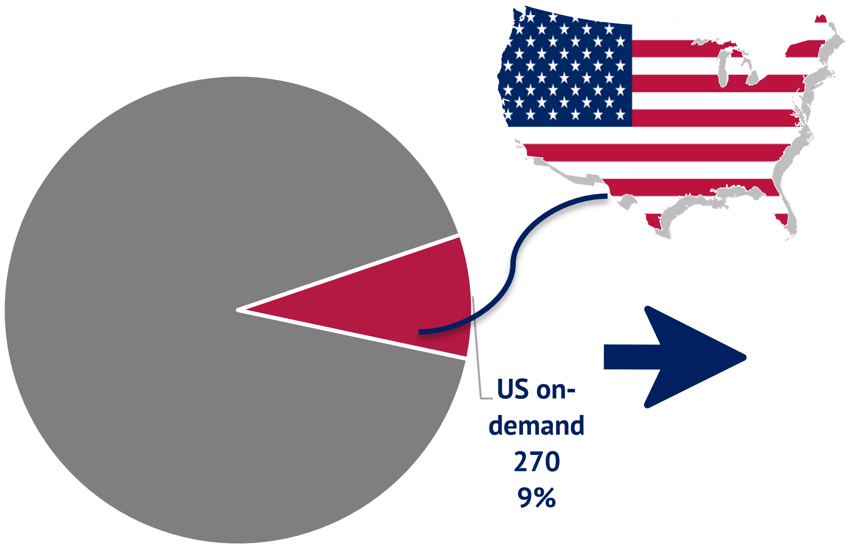
Source: European Audiovisual Observatory / MAVISE

The big picture – US-owned VOD services and VSPs

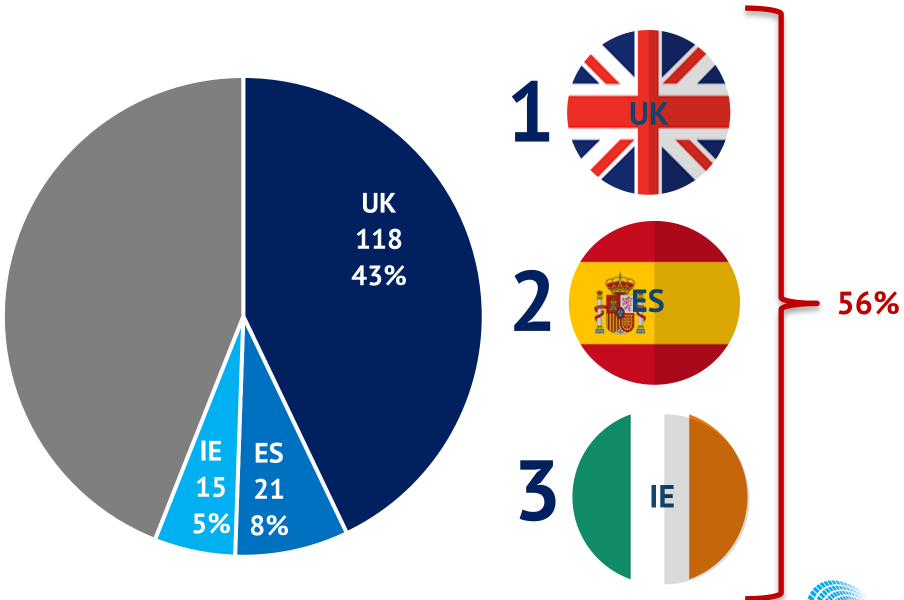
Around one in 10 VOD services and VSPs in Europe is US-owned.

- Over one third of US-owned VOD services and VSPs are based in the United Kingdom.
- Most US-owned VOD services and VSPs serve European markets with country-specific catalogues.
- On-demand services and VSPs are counted on service level, irrespective of the number of catalogues.

Share of US-owned* VOD services and VSPs available in Europe | Dec. 2024 - In number of services and %



Breakdown of US-owned VOD services and VSPs by country of origin | Dec. 2024 - In number of services and %



*Incl. joint ventures with US participation; excl. public, local/regional services.

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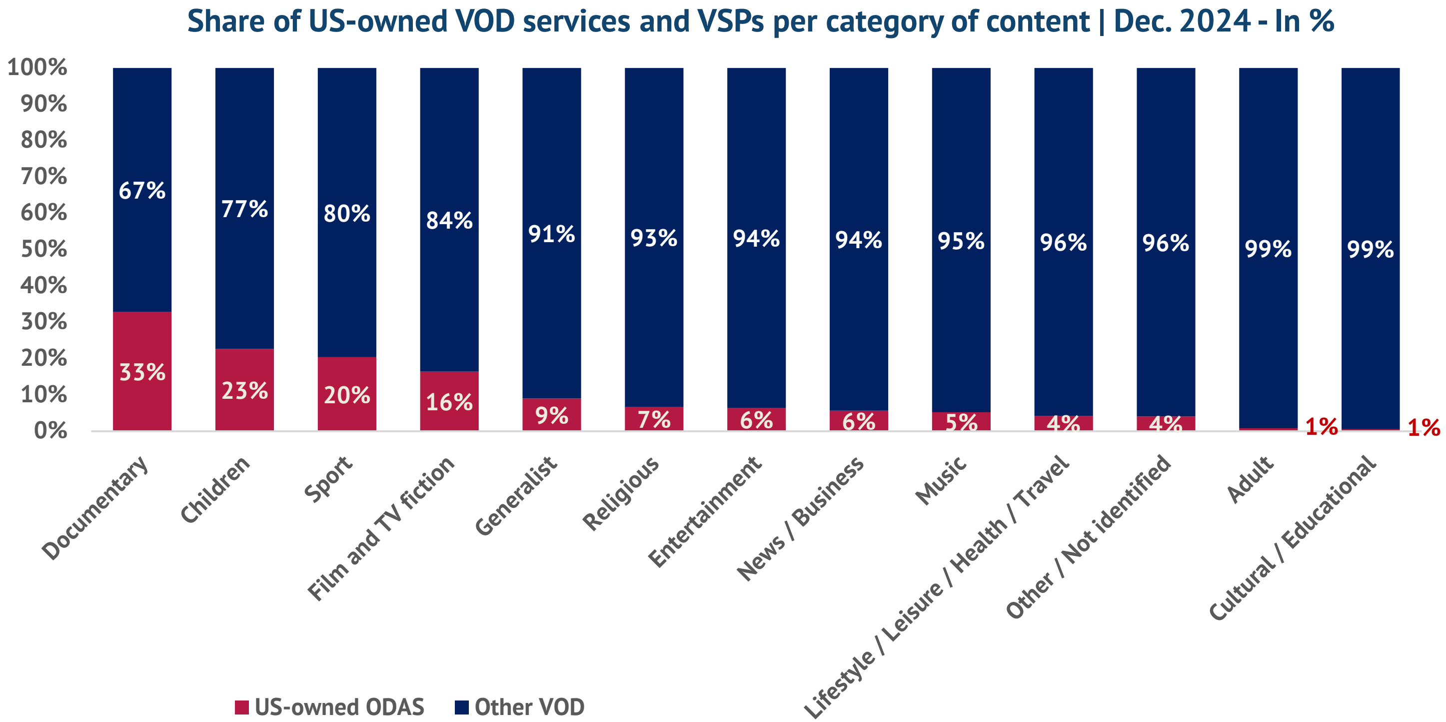
The big picture – Programming of US-owned VOD services and VSPs

A third of the documentary VOD and VSP offer in Europe is US-owned.

- **US-owned VOD services and VSPs are well represented among documentary, children, sport and film and TV fiction programming offers.**
- **Most US-owned VOD services and VSPs are popular brands with a pan-European reach.**



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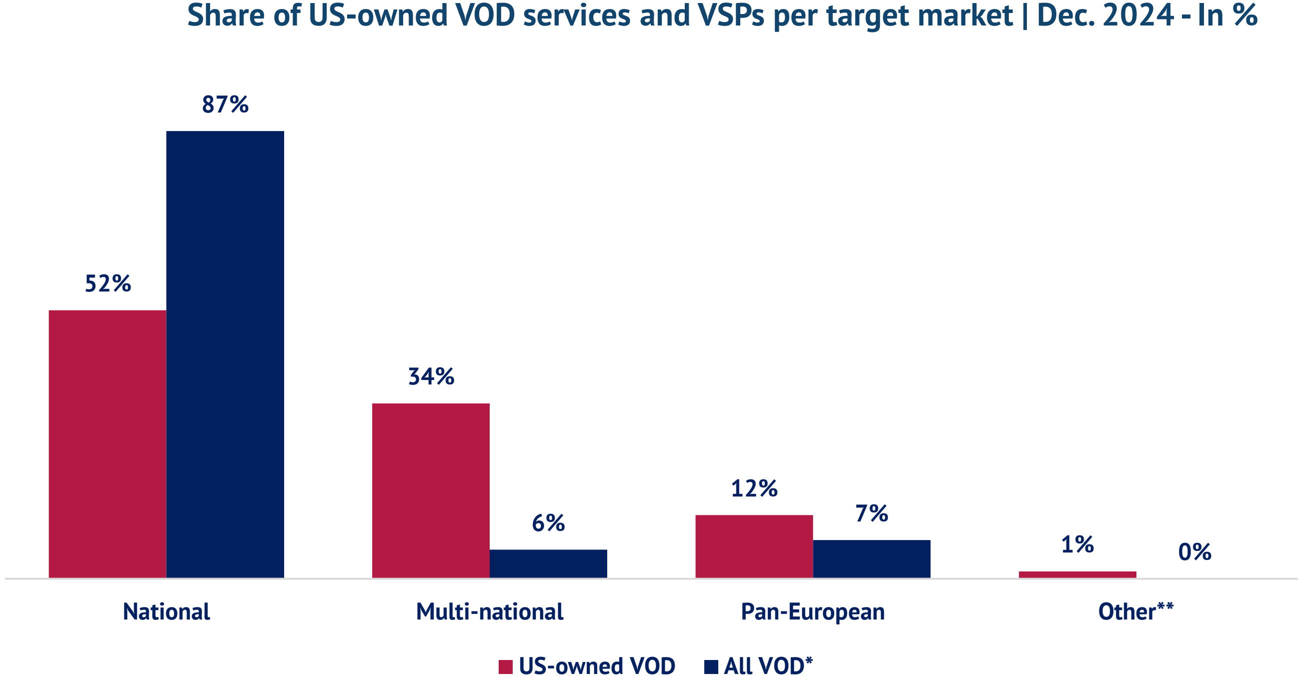
The big picture – Markets targeted by US-owned VOD services and VSPs

US networks are overrepresented among multi-national and pan-European VOD services and VSPs.

➢ **Many US on-demand services and VSPs target markets different to their country of establishment. Half of US services and platforms operate exclusively as national services.**



**All private VOD excl. local/regional services.*

***Other includes services targeting European markets from outside of Europe.*

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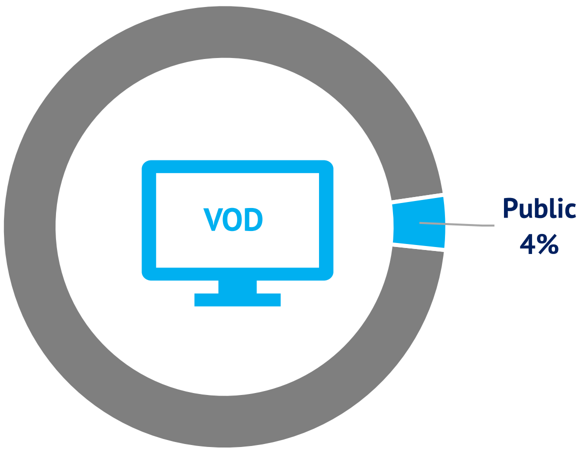
The big picture – Ownership of VOD services and VSPs

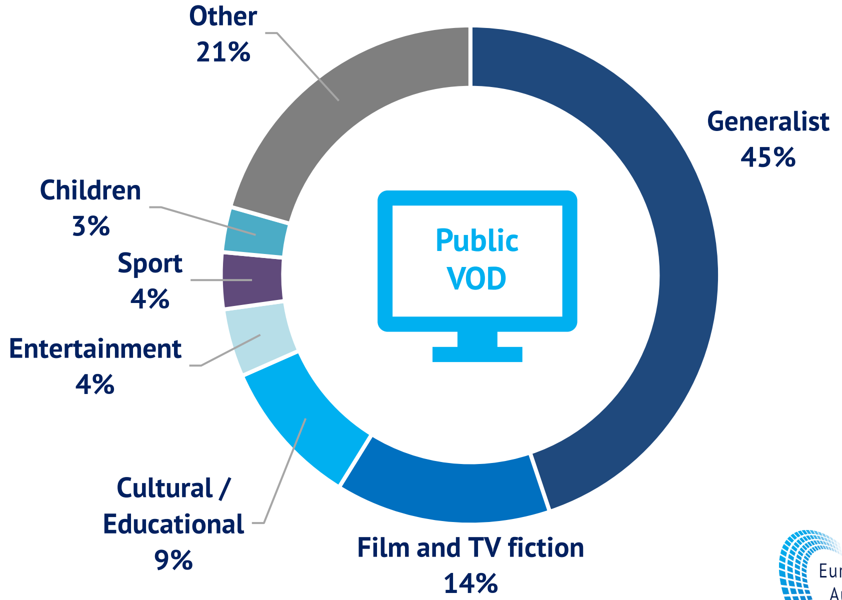
The overwhelming majority of VOD services and VSPs in Europe are in private ownership.

- **Publicly-owned players have entered the VOD market as well, offering mostly generalist programming (45%).**
- **Public services also provide thematic programming such as film archives, cultural and educational online services, platforms for children and entertainment services.**

Breakdown of VOD services and VSPs by ownership | Dec. 2024 - In %



Percentage of public VOD services offering the following categories of content | Dec. 2024



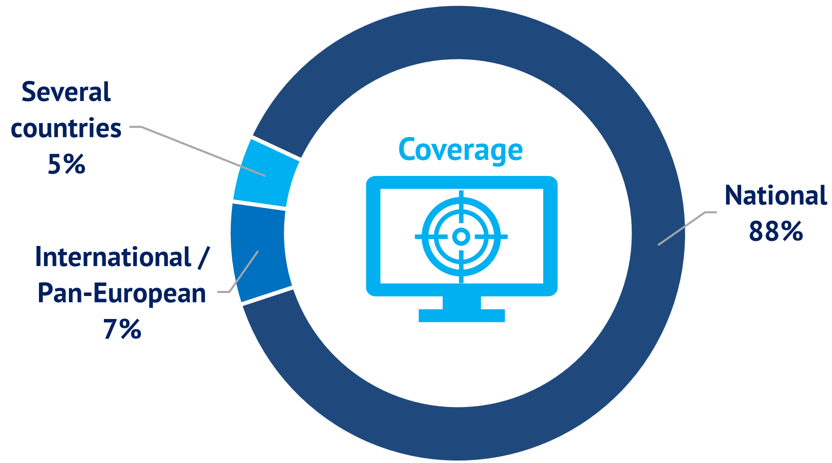
Source: European Audiovisual Observatory / MAVISE

The big picture – Coverage of VOD services and VSPs

The majority (88%) of VOD services and VSPs in Europe operate exclusively on national level.

- **The majority share of national coverage reflects the launch of smaller national VOD and VSP services and the consistent registration of VOD and VSP services in the registries of national media regulatory authorities.**
- **One in 10 VOD services and VSPs (12%) operates in several markets or at pan-European level.**

Breakdown of VOD services and VSPs by coverage | Dec. 2024 – In %



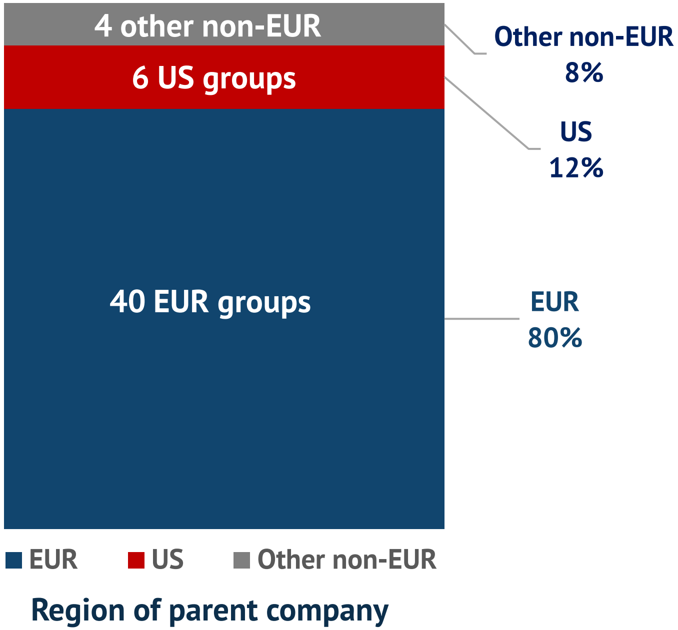
Source: European Audiovisual Observatory / MAVISE

The big picture – Services and platforms operated by the top 50 VOD players

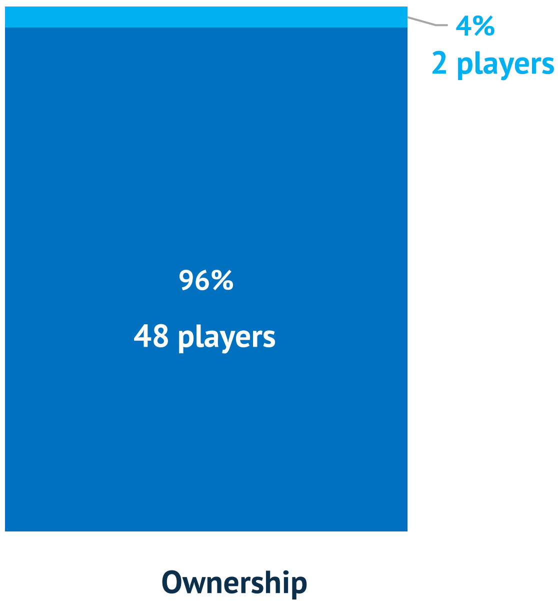
Over a quarter of services operated by the top 50 VOD players* has a non-European parent company.

- **Six US players operate the majority (12%) of VOD services and VSPs with a non-European parent company.**
- **Private VOD players operate most services and platforms in the top 50 ranking.**

Breakdown of services operated by top 50 groups for VOD services and VSPs by region of final owner | Dec. 2024 - In %



Breakdown of services operated by top 50 groups for VOD services and VSPs by ownership | Dec. 2024 - In %



Top 50 VOD players ranked by number of VOD services and VSPs operated.

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European Audiovisual Observatory

The big picture – Services and platform offer of top 10 VOD players

Two other US companies joined the top 10 VOD players in 2024 (The Walt Disney Company and Paramount).

- **Four out of the top 10 VOD players ranked by number of services are US companies.**

Top 10 VOD players by number of services | Dec. 2024

Rank	Company	Ownership	# ODAS
1	Comcast (US)	Private	60
2	Groupe Canal Plus (FR)	Private	51
3	Warner Bros. Discovery (US)	Private	45
4	Polski Koncern Naftowy Orlen (PL)	Private	42
5	Starmax Media (CZ)	Private	31
6	Mediawan/KKR (FR/US)	Private	29
7	The Walt Disney Company (US)	Private	29
8	United Group (CZ) / BC Partners (UK)	Private	25
9	Paramount (US)	Private	25
10	Telefonica (ES)	Private	24

Source: European Audiovisual Observatory / MAVISE

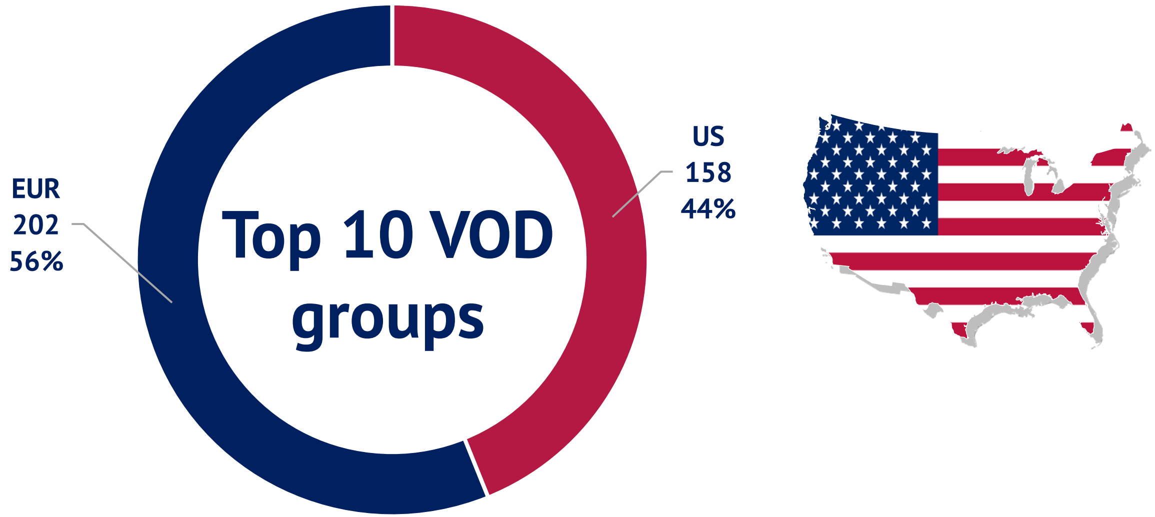
European Audiovisual Observatory

The big picture – US share among top 10 VOD players

Thanks to their diverse service portfolios, several European players rank among the top 10 VOD groups.

- **44% of VOD services and VSPs in the top 10 VOD groups belong to four US parent companies (Comcast, Warner Bros. Discovery, The Walt Disney Company and Paramount).**
- **The top 10 VOD groups in Europe represent 11% of the total VOD services and VSP offering in Europe.**

US share among top 10 VOD group services portfolio | Dec. 2024 - In number of services and %



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Source: European Audiovisual Observatory / MAVISE

Part II. Main players

Main players – Top 20

Main players – Ownership of top 20 TV and VOD players

The great majority of the top 20 TV and VOD players are privately owned.

- All but one of the top 20 TV and VOD players – the BBC – are in private ownership.

Breakdown of top 20 TV and VOD players in Europe by ownership | Dec. 2024 – In %

Top private players

Warner Bros. Discovery
Disney
Amazon
Netflix
Comcast
Paramount
Mubi
Rakuten
Huawei
Apple
Canal+
Alphabet
V World
Laliga Group
AMC Networks
Microsoft
Whale TV
PPF Group
Antenna Group

Top public players

BBC

Source: European Audiovisual Observatory / MAVISE

Main players – Market presence of top 20 TV and VOD players

The majority of the top 20 TV and VOD players active in Europe has a pan-European presence.

- **Most European players have fewer market presences compared to Chinese, Japanese and US players.**

Top 20 TV and VOD players by number of presences in markets* | Dec. 2024

Rank	Company	# Markets
1	Warner Bros. Discovery (US)	45
2	The Walt Disney Company (US)	44
3	Amazon Inc (US)	41
4	Netflix (US)	41
5	Comcast (US)	40
6	Paramount (US)	40
7	Mubi Inc (US)	38
8	Rakuten Inc (JP)	37
9	Huawei (CN)	36
10	Apple Inc (US)	32

Rank	Company	# Markets
11	Canal + (FR)	29
12	Alphabet (US)	28
13	BBC (UK)	26
14	V World Holdings (UK)	26
15	Laliga Group International (ES)	25
16	AMC Networks Inc (US)	24
17	Microsoft Corporation (US)	20
18	Whale TV (SG)	18
19	PPF Group (CZ)	17
20	Antenna Group (GR)	15

**Excl. non-EUR countries; incl. microstates; number of countries in which a group is present at least once; no doubling.*
Source: European Audiovisual Observatory / MAVISE

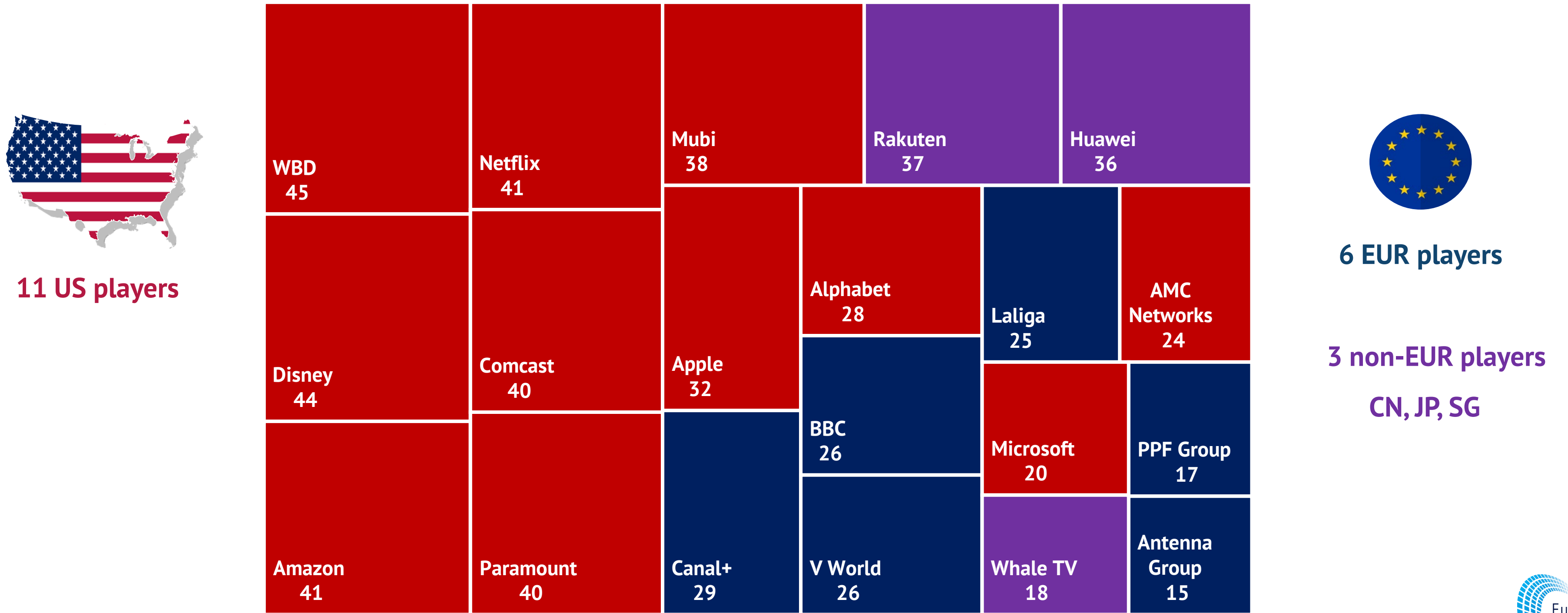
European Audiovisual Observatory

Main players – Origin of top 20 TV and VOD players

The majority of the top 20 TV and VOD players active in Europe has a non-European parent company.

- **8 out of 10 of the most widespread TV and VOD groups in Europe are US-based.**

Origin of top 20 TV and VOD players in Europe | Dec. 2024 - In number of operating markets



 / Source: European Audiovisual Observatory / MAVISE

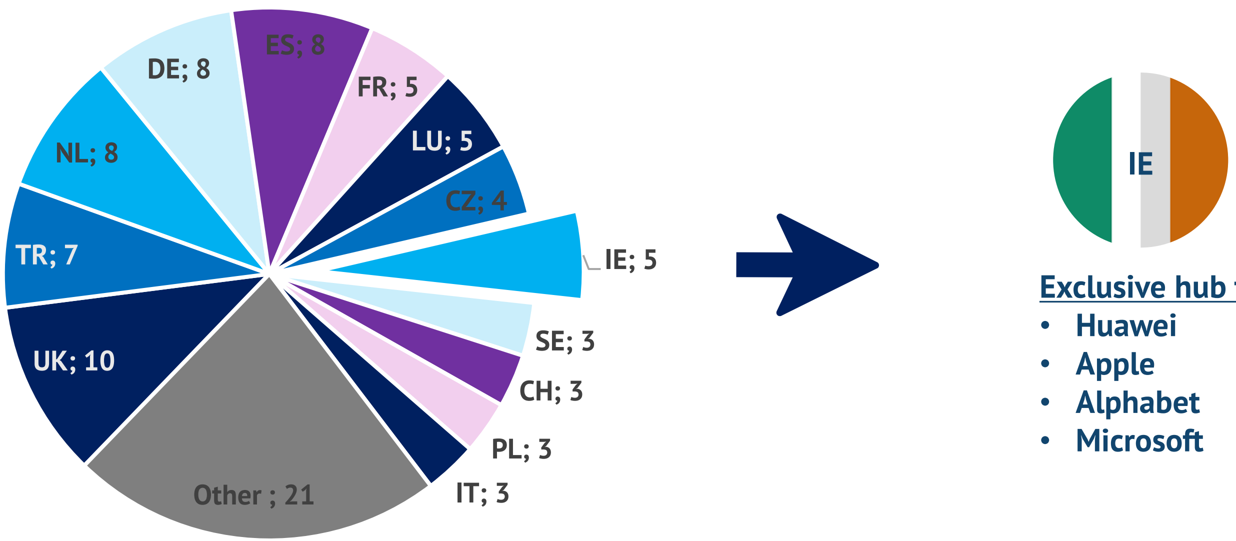
European Audiovisual Observatory

Main players – Establishment hubs of top 20 TV and VOD players

10 out of the 20 top TV and VOD players use the United Kingdom as an establishment base.

➢ **Four of the top 20 TV and VOD players use Ireland as their exclusive establishment hub. These are: Chinese Huawei and US players Apple, Alphabet and Microsoft.**

Establishment hubs of top 20 TV and VOD players in Europe | Dec. 2025 - In number of occurrences



Exclusive hub for:
- Huawei
- Apple
- Alphabet
- Microsoft

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Source: European Audiovisual Observatory / MAVISE

Main players – Top 5 TV and VOD players (1/4)

Most top 20 players build VOD presence in markets where they are already active with TV.

- **Warner Bros. Discovery, Disney and Comcast are multi-brand players, equally driven by TV and VOD presences.**
- **Amazon and Netflix are single-brand players whose presence is typically driven by VOD markets.**

Top 5 TV and VOD players by number of presences in markets* | Dec. 2024

	Company	No. markets* TV+VOD | TV | VOD	Main brands**
1	Warner Bros. Discovery (US)	**∑ 45 |** TV 44 **|** VOD 39	Animal Planet, Boomerang, Cartoon Network, Discovery, Eurosport, HBO MAX, ID, TLC
2	The Walt Disney Company (US)	**∑ 44 |** TV 42 **|** VOD 40	24 Kitchen, Disney Channel, ESPN, FX, National Geographic, Disney+
3	Amazon Inc (US)	**∑ 41 |** TV 2 **|** VOD 41	Amazon Prime Video
4	Netflix (US)	**∑ 41 |** TV -- **|** VOD 41	Netflix
5	Comcast (US)	**∑ 40 |** TV 37 **|** VOD 37	13th Street, E! Entertainment, Sky, Peacock, Hayu

**Excl. non-EUR countries; incl. microstates; number of countries in which a group is present at least once; no doubling.*
***Examples are not exhaustive.*
Source: European Audiovisual Observatory / MAVISE

Main players – Top 6-10 TV and VOD players (2/4)

Contrary to other top players, Rakuten builds TV presence through its VOD markets.

- **Mubi, Rakuten Huawei and Apple are players whose presence is typically driven by VOD markets.**
- **Paramount is a multi-brand players with an emphasis on TV market presences.**

Top 6-10 TV and VOD players by number of presences in markets* | Dec. 2024

	Company	No. markets* TV+VOD | TV | VOD	Main brands**
6	Paramount (US)	**∑ 40 |** TV 40 **|** VOD 11	Comedy Central, MTV, Nick Junior, Nickelodeon, Pluto TV, Paramount+
7	Mubi Inc (US)	**∑ 38 |** TV -- **|** VOD 38	Mubi
8	Rakuten Inc (JP)	**∑ 37 |** TV 17 **|** VOD 37	Rakuten TV
9	Aspiegel (IE) / Huawei (CN)	**∑ 36 |** TV -- **|** VOD 36	Huawei Video
10	Apple Inc (US)	**∑ 32 |** TV -- **|** VOD 32	Apple TV+, iTunes Store

**Excl. non-EUR countries; incl. microstates; number of countries in which a group is present at least once; no doubling.*
***Examples are not exhaustive.*
Source: European Audiovisual Observatory / MAVISE

European Audiovisual Observatory

Main players – Top 11-15 TV and VOD players (3/4)

Most top 20 players are either multi-brand TV and VOD players or single brand VOD players.

- **Alphabet is a player whose presence is typically driven by VOD markets.**
- **Canal Plus, the BBC, and V World are multi-brand players with an emphasis on TV market presences.**
- **Laliga is a single-brand player whose presence is driven by TV market presence.**
- **Overall, most broadcasters in the top 20 ranking launched VOD services.**

Top 11-15 TV and VOD players by number of presences in markets* | Dec. 2024

	Company	No. markets* TV+VOD | TV | VOD	Main brands**
11	Groupe Canal Plus (FR)	**∑ 29 |** TV 27 **|** VOD 14	Canal+, Canal+ Sport, Filmbox+
12	Alphabet (US)	**∑ 28 |** TV -- **|** VOD 28	Google TV/Play, YouTube Movies and TV
13	BBC (UK) / Government of United Kingdom	**∑ 26 |** TV 24 **|** VOD 7	BBC Brit, BBC Earth, BBC First, Cbeebies, BBC iPlayer, Britbox International
14	Viasat World / V World Holdings (UK)	**∑ 26 |** TV 26 **|** VOD 2	Epic Drama, TV1000, Viasat
15	Laliga (ES)	**∑ 25 |** TV 25 **|** VOD 2	

**Excl. non-EUR countries; incl. microstates; number of countries a group is present in at least once; no doubling.*
***Examples are not exhaustive.*
Source: European Audiovisual Observatory / MAVISE

European Audiovisual Observatory

Main players – Top 16-20 TV and VOD players (4/4)

Most multi-brand players with a mixed TV and VOD presence expand their reach through TV market presence.

- **Microsoft and Rlaxx TV are single-brand players whose presence is typically driven by VOD markets.**
- **AMC Networks, PPF Group and Antenna Group are players with an emphasis on TV market presences.**

Top 16-20 TV and VOD players by number of presences in markets* | Dec. 2024

	Company	No. markets* TV+VOD | TV | VOD	Main brands**
16	AMC Networks	**∑ 24 |** TV 23 **|** VOD 7	AMC TV, JimJam, Spektrum TV, Sundance TV, TV Paprika, Shudder
17	Microsoft Corporation (US)	**∑ 20 |** TV -- **|** VOD 20	Microsoft Movies & TV, Microsoft Start
18	Whale TV	**∑ 18 |** TV -- **|** VOD 18	Rlaxx TV
19	PPF Group (CZ)	**∑ 17 |** TV 17 **|** VOD 6	bTV, Nova, Pro, Voyo
20	Antenna Group (GR)	**∑ 15 |** TV 15 **|** VOD 2	ANT, AXN

**Excl. non-EUR countries; incl. microstates; number of countries in which a group is present at least once; no doubling.*
***Examples are not exhaustive.*
Source: European Audiovisual Observatory / MAVISE

Main players – Case studies

Netflix (HQ in US)

Netflix is based in one main country, the Netherlands, and serves 41 European VOD markets

1 country of establishment*
The Netherlands

29 EEA markets
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

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

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

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Source: European Audiovisual Observatory / MAVISE / Dec. 2024

European Audiovisual Observatory

Antenna Group (HQ in NL)

Antenna Group is based in a limited number of countries, from where it serves 15 European TV and VOD markets

4 countries of establishment
CY, GR, NL, RO

10 EEA markets
BG, CY, CZ, GR, HR, HU, PL, RO, SI, SK

5 other European markets
BA, MD, ME, MK, RS

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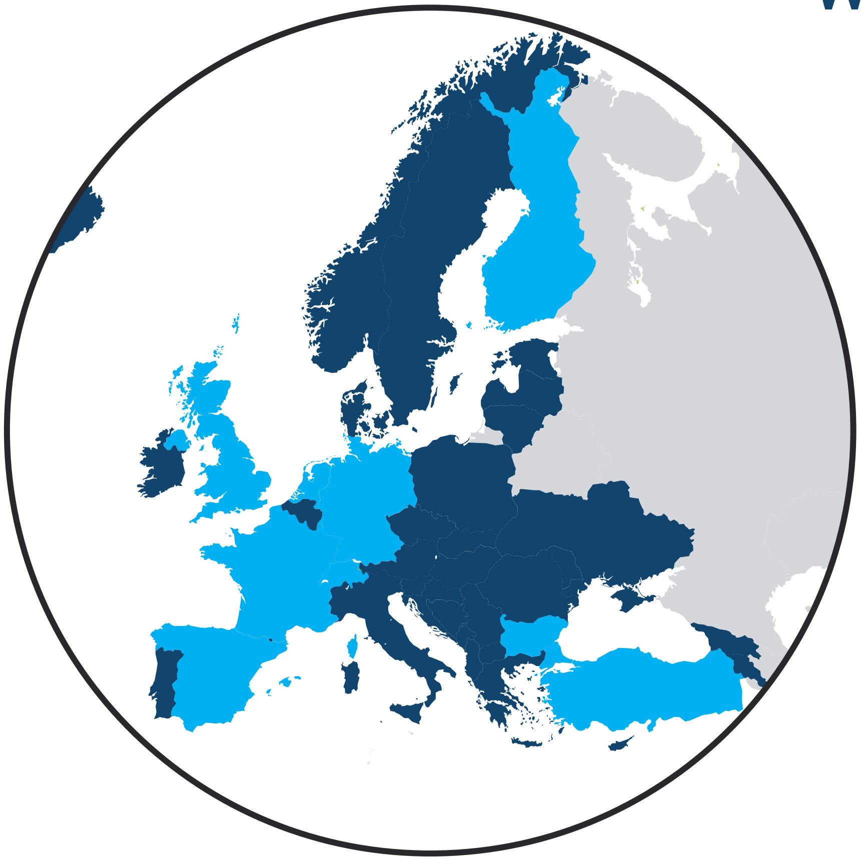
Source: European Audiovisual Observatory / MAVISE / Dec. 2024

European Audiovisual Observatory



Walt Disney Company (HQ in US)

The Walt Disney Company is based in several countries, from where it serves 44 European TV and VOD markets

10 countries of establishment

BG, CH, DE, ES, FI, FR, LU, NL, TR, UK

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

14 other European markets*

AD, AL, AM, BA, CH, GE, MC, MD, ME, MK, RS, TR, UA, UK

** Incl. microstates.*

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Source: European Audiovisual Observatory / MAVISE / Dec. 2024

European Audiovisual Observatory

Audiovisual media services in Europe – 2024 data
European Audiovisual Observatory, Strasbourg, 2025

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