# Audiovisual media services in Europe - 2024 edition

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# Table of contents



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# Introduction



Audiovisual media services and video-sharing platforms 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 key to sizing and comprehending the European audiovisual sector.

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.

[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 2023 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:** 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 (AV) 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 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**: 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.

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# 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. References to VOD include figures for VSPs.

**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:** 1. The number of services are represented by the number of service providers (i.e. 1 service = 1 service provider), 2. 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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- 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 offering a total of 12 703 audiovisual media services and video-sharing platforms which are available in wider Europe (Dec. 2023).

- Around three quarters of these are linear services (9 434 TV channels) and one quarter are non-linear services (3 269 VOD services including AVOD, catch-up TV and video-sharing platforms). A substantial part of TV channels in Europe are regional and local TV services (42%). 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 (56%) whilst the other TV channels provide generalist programming. In contrast, one quarter of video-on-demand services and video-sharing platforms (24%) in Europe offer entertainment, 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 and VSPs are privately owned (97%). 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.

# 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 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 22% for television and 14% for on-demand services.

- The programming content of multi-national 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 in private ownership.

- 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. 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.

- Overall, US groups have a substantial influence on the European audiovisual sector, with significant portfolios and market presence compared to their European counterparts. Around one in four (23%) of all private TV channels (excluding local TV) are US-owned and one in ten (8%) of all on-demand services in Europe belong to a US company. US TV channel portfolios are significantly larger than European ones, with 71% of channels in the top 10 TV groups owned by five US companies.

# Executive summary – II. Main players



- 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 HBO MAX are virtually omnipresent with 46 European markets covered. Walt Disney, Amazon, Netflix, Comcast and Paramount all operate in 40 or more European markets. Overall, European players have fewer market presences compared to Chinese, Japanese and US players.

- The top pan-European players are either multi-brand players, like Comcast, active in both TV and VOD markets or single brand players, like Netflix, 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 decentralized strategy where a larger number of establishment hubs serve the European markets to disseminate the Discovery, Eurosport and HBO MAX brands.

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

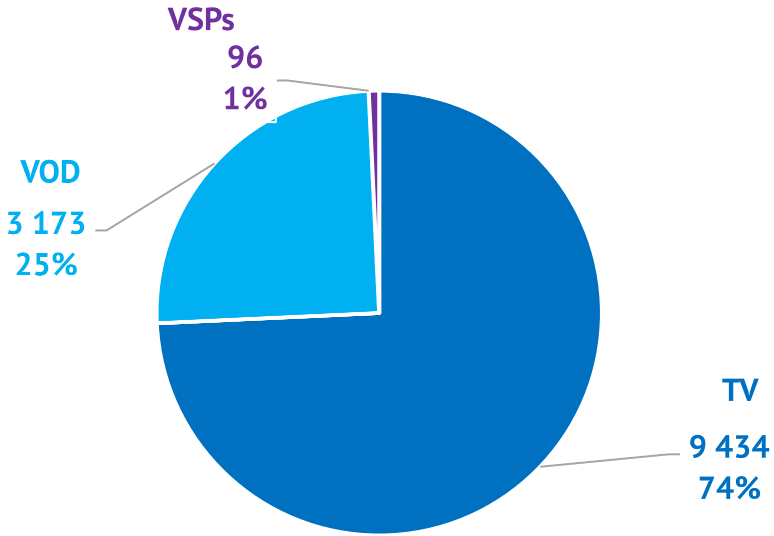
# Part I. The big picture – AV services and VSPs

# The big picture – Audiovisual media services and VSPs

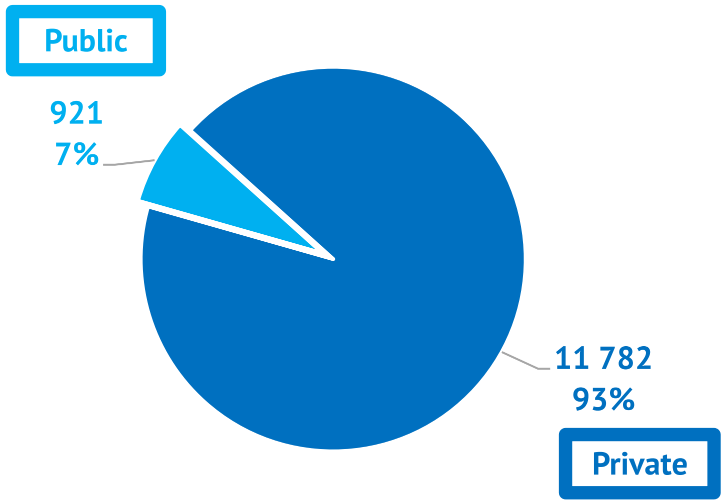
*Overall, there are 12 703 audiovisual media services and VSPs available in wider Europe (Dec. 2023)*.*

- **One in four services in Europe is an on-demand service or video-sharing platform.**
- **Most audiovisual media services are in private hands and 7% are in public ownership.**

**Type of audiovisual media services and VSPs available in Europe | Dec. 2023 - In number of services and %**




**Ownership of audiovisual media services and VSPs available in Europe | Dec. 2023 - In number of services and %**



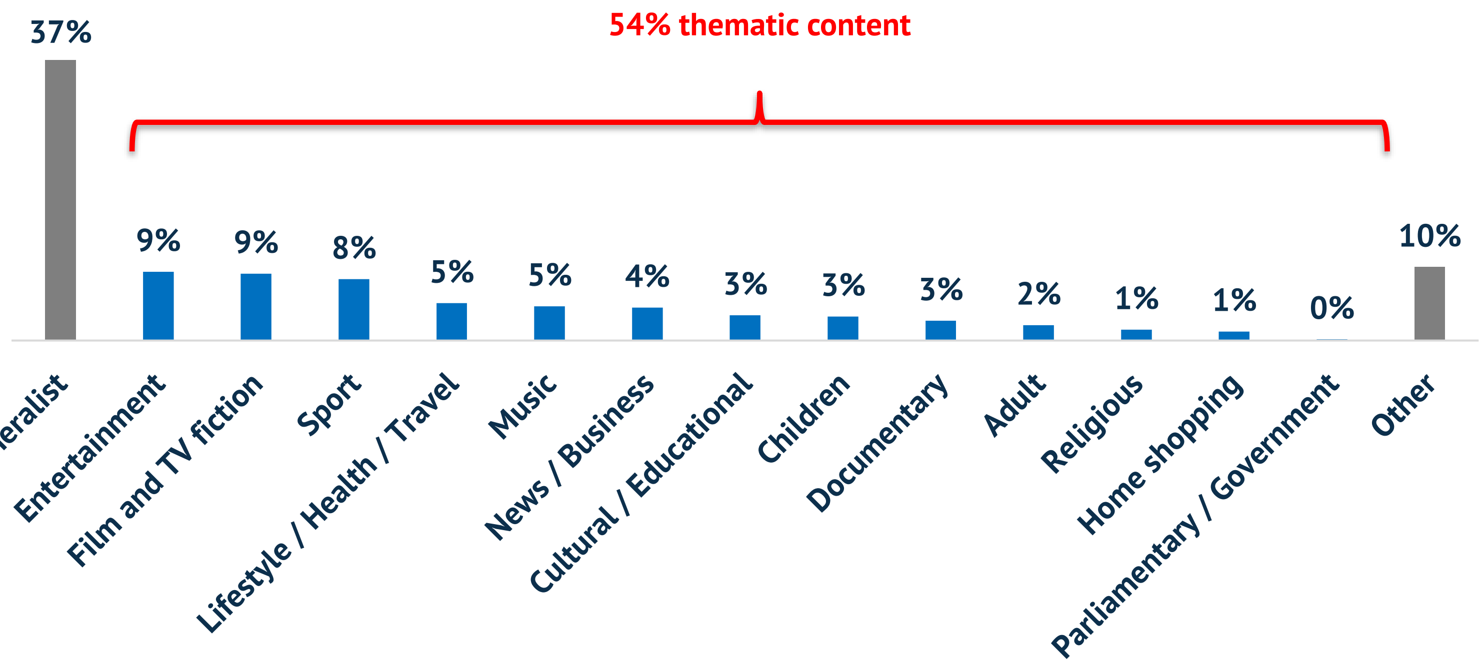

**For full list of definitions see scope and methodology section.*
*Source: European Audiovisual Observatory / MAVISE*

# The big picture – Audiovisual media services and VSP content

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

- At least 54% 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. 2023




*Source: European Audiovisual Observatory / MAVISE*

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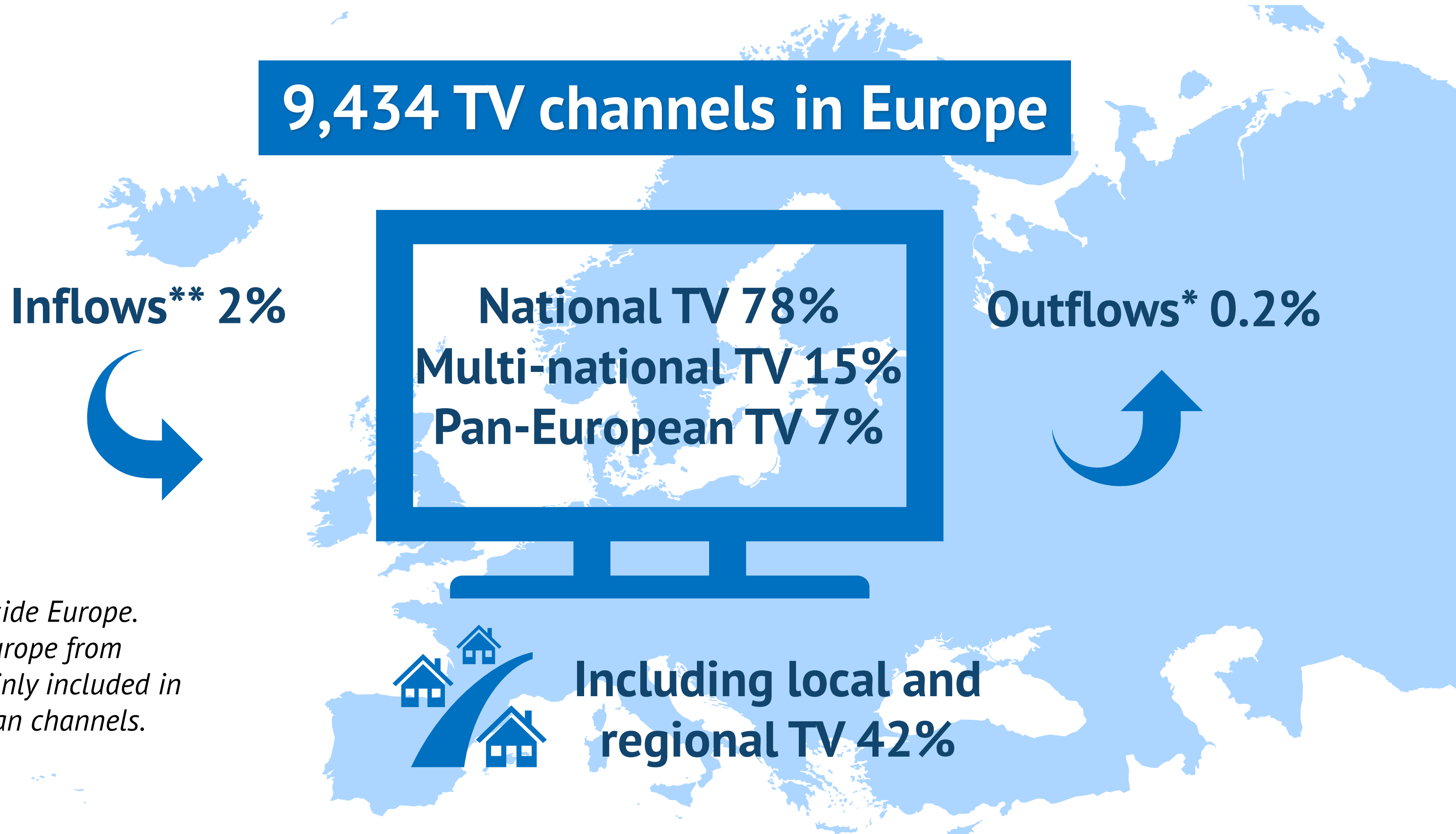
# The big picture – TV channels

# The big picture – TV channels in Europe

***Most TV channels in Europe exclusively serve national markets (78%).***

- **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. 2023*

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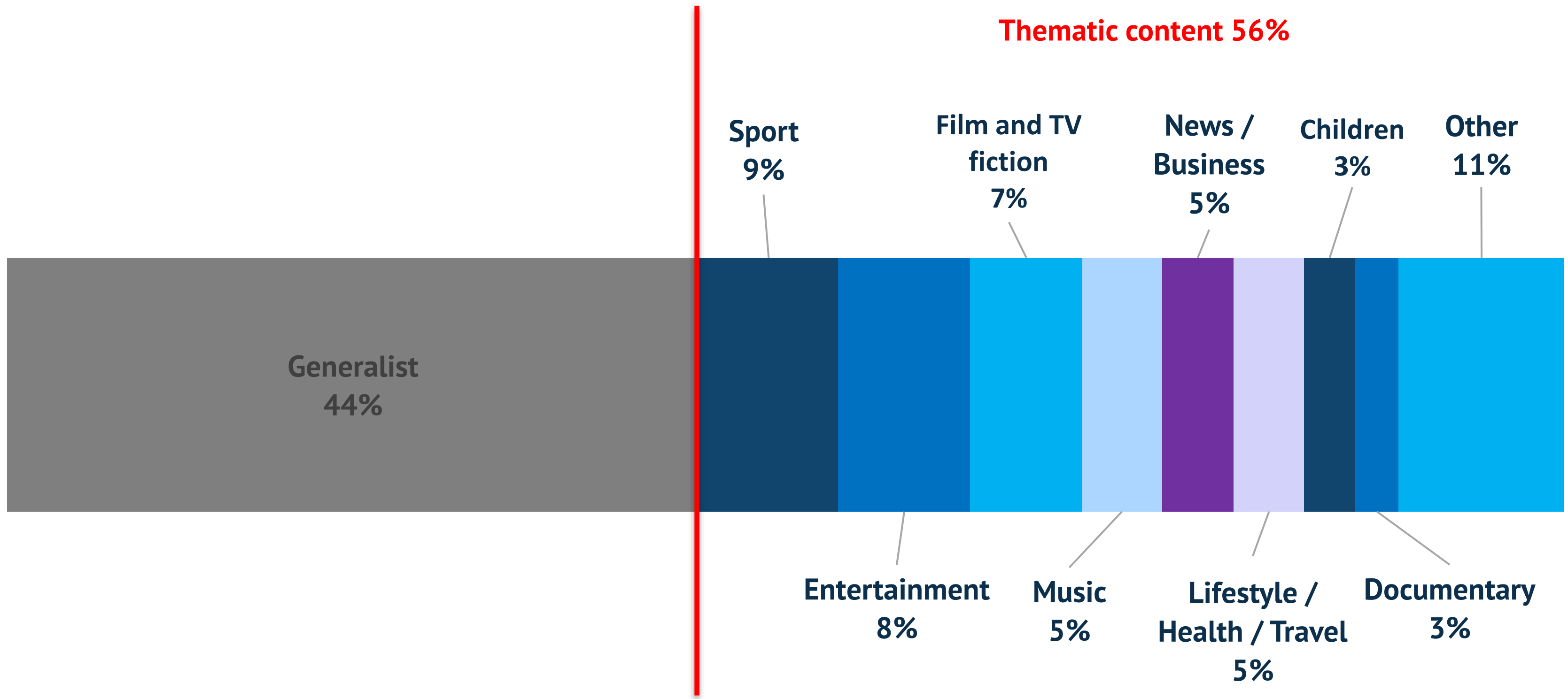
# The big picture – TV channel content

*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. 2023**



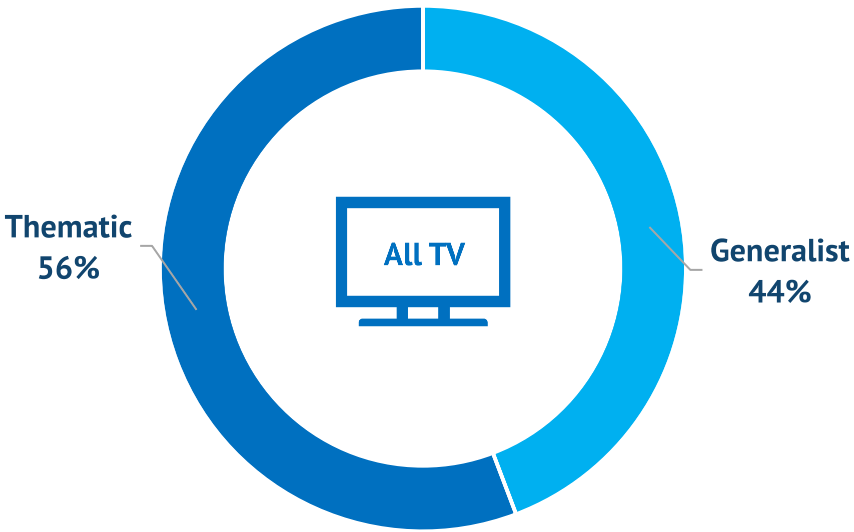

*Source: European Audiovisual Observatory / MAVISE*

# The big picture – Local and regional TV channels

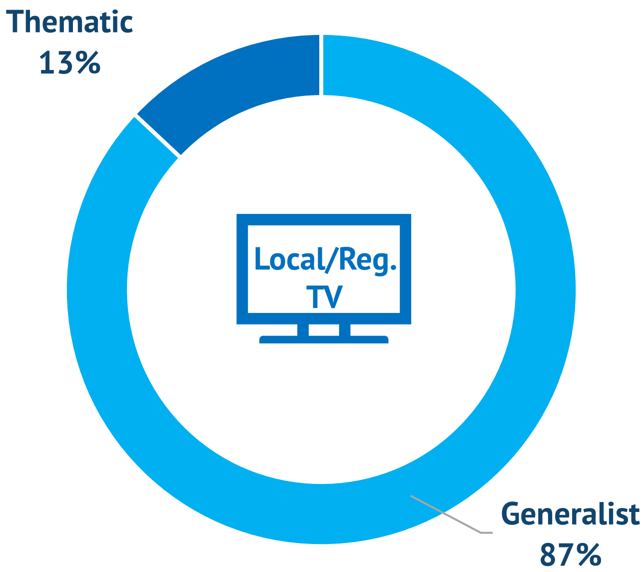
***The great majority of local and regional TV channels in Europe has generalist programming.***

- **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. 2023**




**Percentage of local and regional TV channels offering the following categories of content | Dec. 2023**



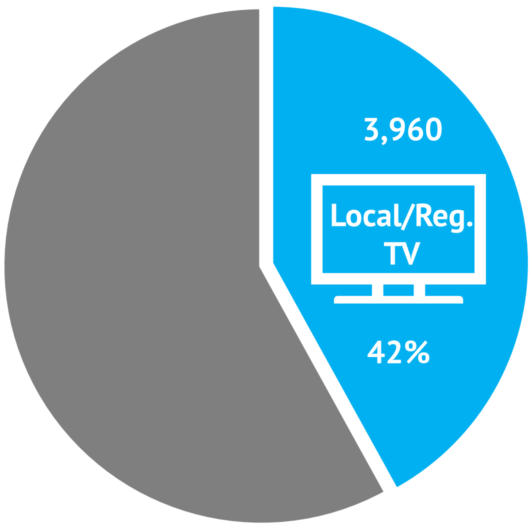

*Source: European Audiovisual Observatory / MAVISE*

# The big picture – Local and regional TV channels

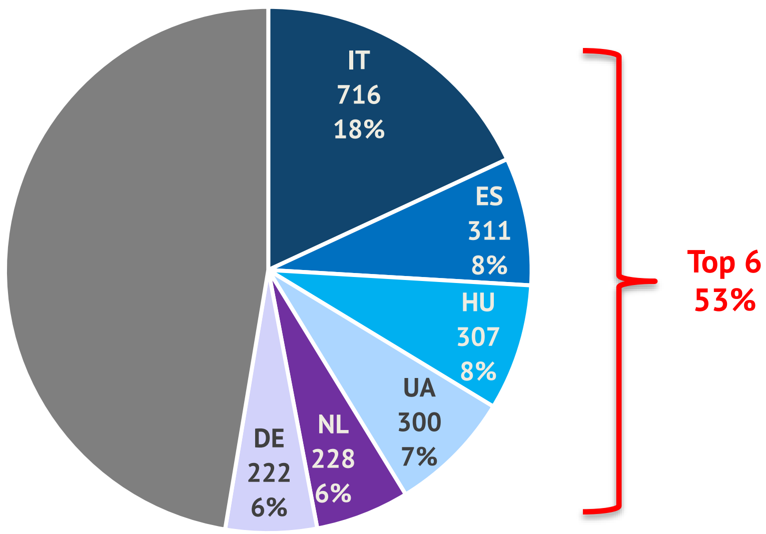
***The European television sector is characterised by a significant share of local and regional TV services.***

- **Local and regional TV makes up 42% 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 18% of all local and regional channels in Europe.**

**Share of local and regional TV channels available in Europe | Dec. 2023 - In number of services and %**

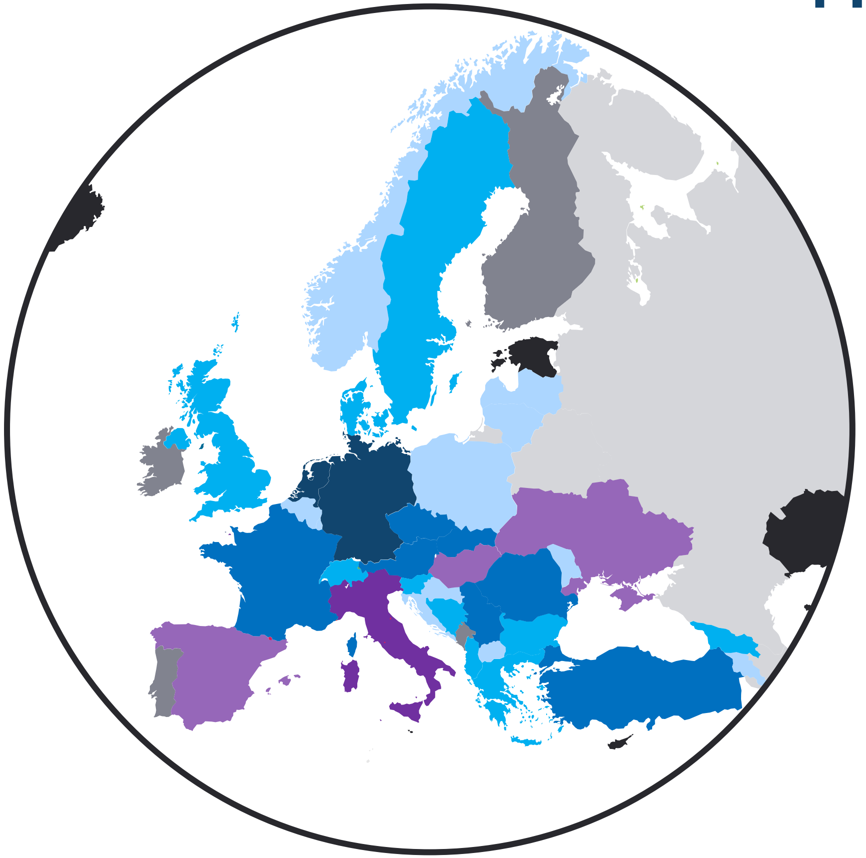



**Breakdown of local and regional TV by country | Dec. 2023 - In number of services and %**




*Source: European Audiovisual Observatory / MAVISE*

# Map of local and regional TV



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

- > 600 : IT
- > 300 : ES, HU, UA
- > 200 : DE, NL
- > 100 : AT, CZ, FR, RO, RS, SK, TR
- 30-99 : AL, BA, BG, CH, DK, GE, GR, SE, SI, UK
- 10-29 : AM, BE, HR, LT, LU, LV, MD, MK, NO, PL
- >10 : FI, IE, LI, ME, PT
- None : EE, CY, IS, MT

*Map of Europe © Copyright Showeet.com*
*Source: European Audiovisual Observatory / MAVISE / Dec. 2023*

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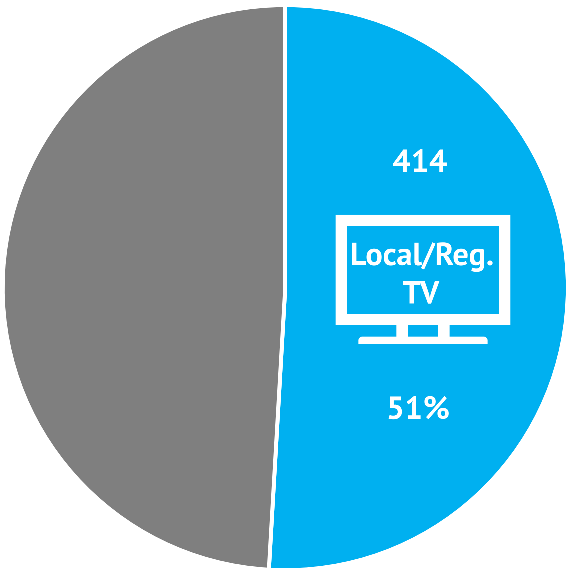
# The big picture – Public local and regional TV channels

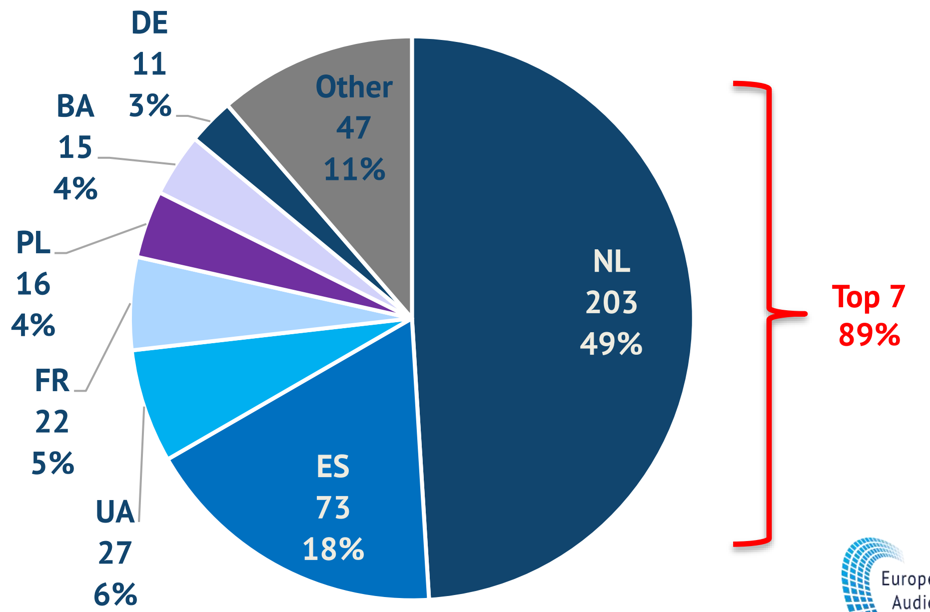
***Half of all public service TV channels are local and regional services.***

- **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 more than 200 in the Netherlands to fewer than ten in 12 European countries.**

**Share of local and regional channels among public TV | Dec. 2023 - In number of services and %**




**Breakdown of public local and regional TV by country | Dec. 2023 - In number of services and %**



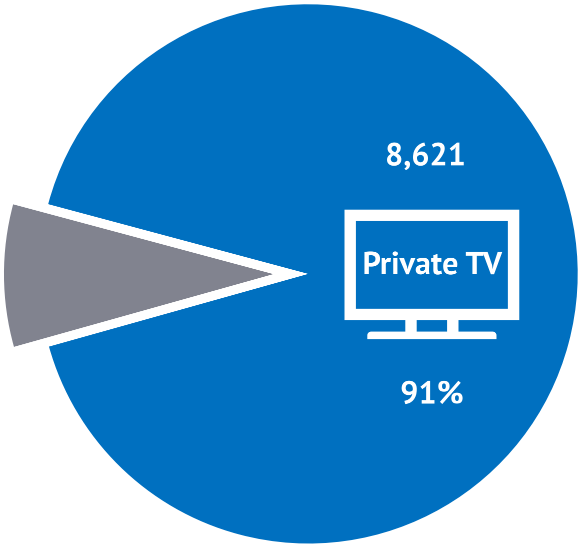

*Source: European Audiovisual Observatory / MAVISE*

# The big picture – Private TV channels

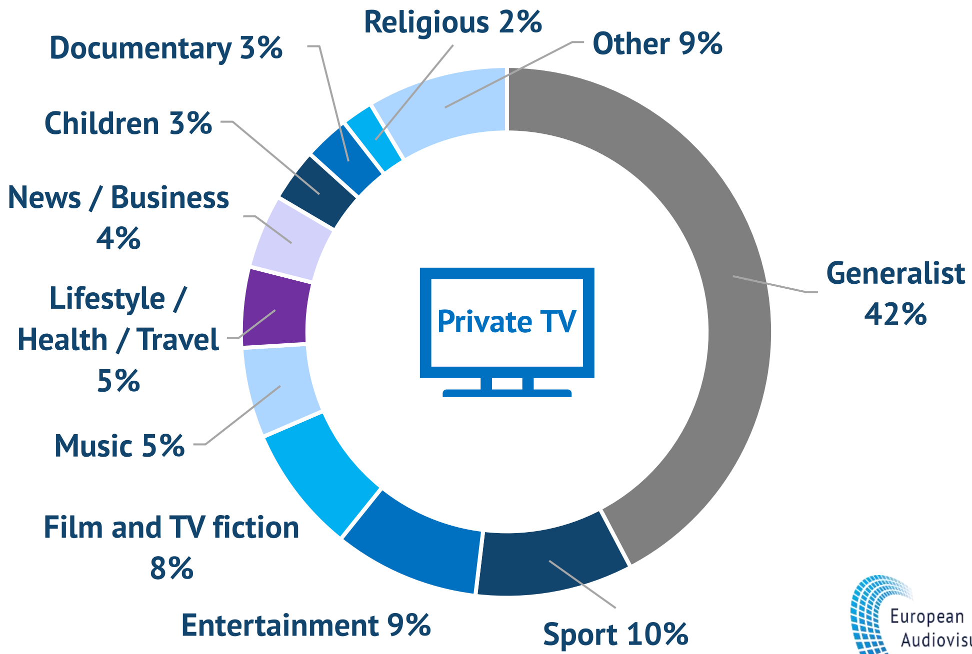
***The great majority of TV channels in Europe are private.***

- **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. 2023 - In number of services and %**




**Percentage of private TV channels offering the following categories of content | Dec. 2023**



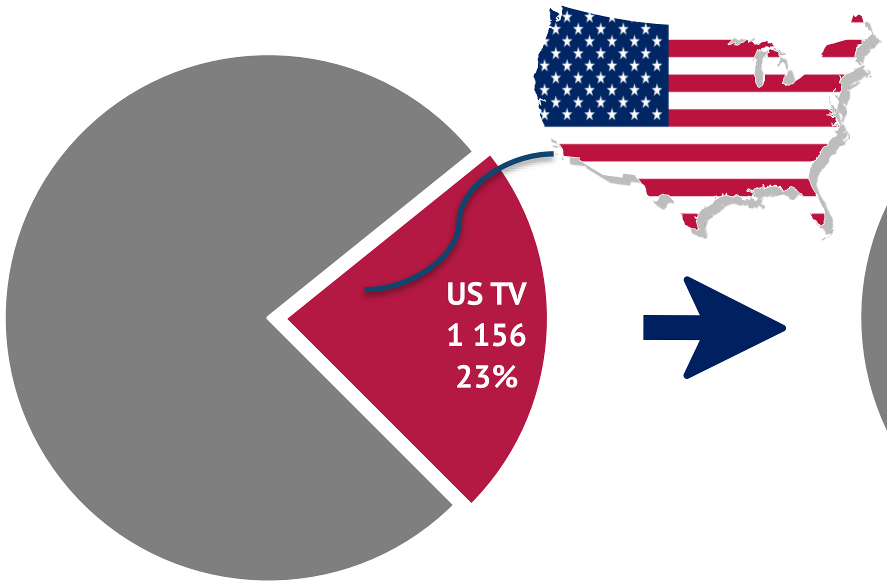

*Source: European Audiovisual Observatory / MAVISE*

# The big picture – US share among private TV channels

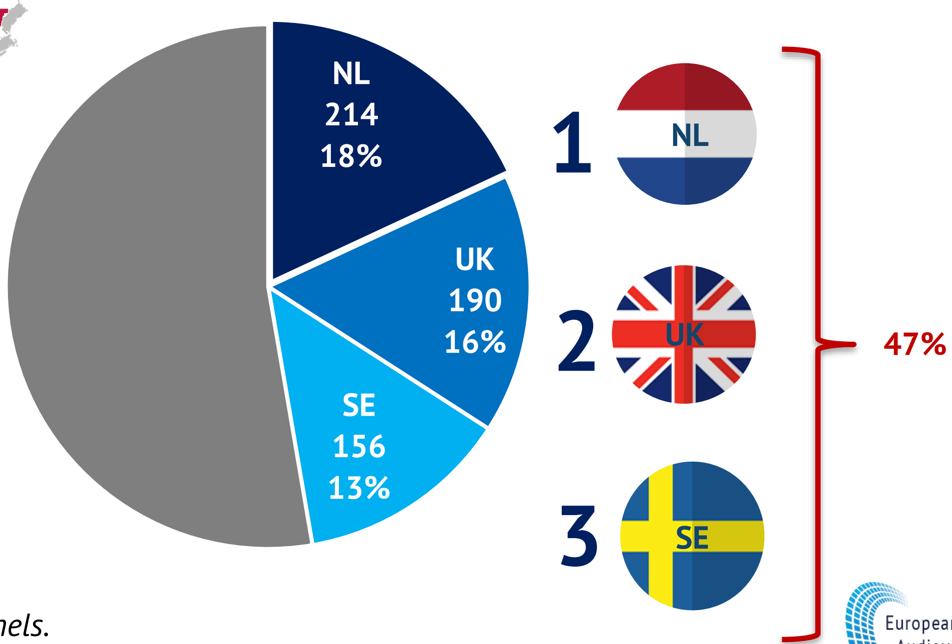
*Around one in four private TV channels in Europe is US-owned.*

- 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. 2023 - In number of services and %**




**Breakdown of US-owned private TV by country of origin | Dec. 2023 - In number of services and %**




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

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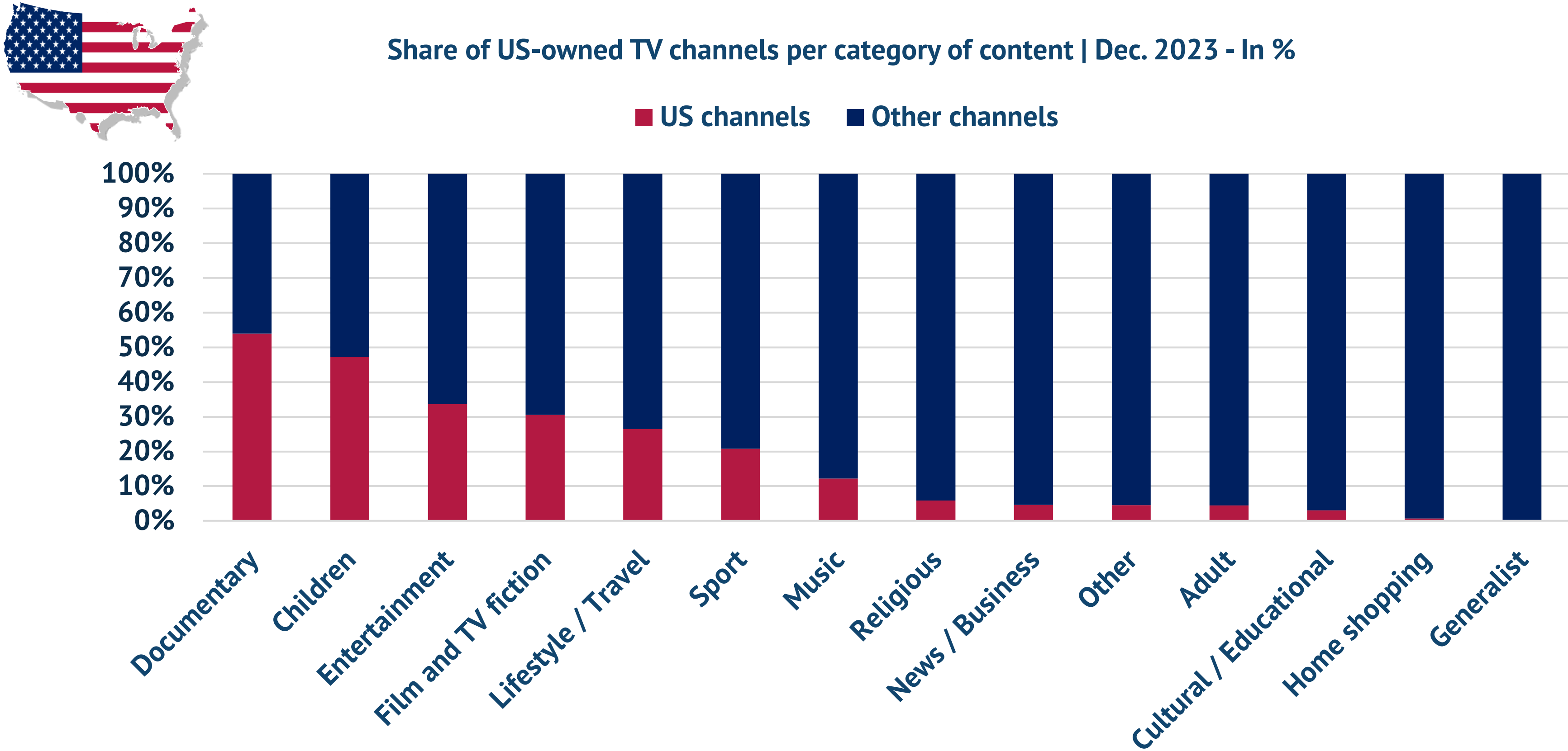
*Source: European Audiovisual Observatory / MAVISE*

# The big picture – Programming of US TV channels

*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.**

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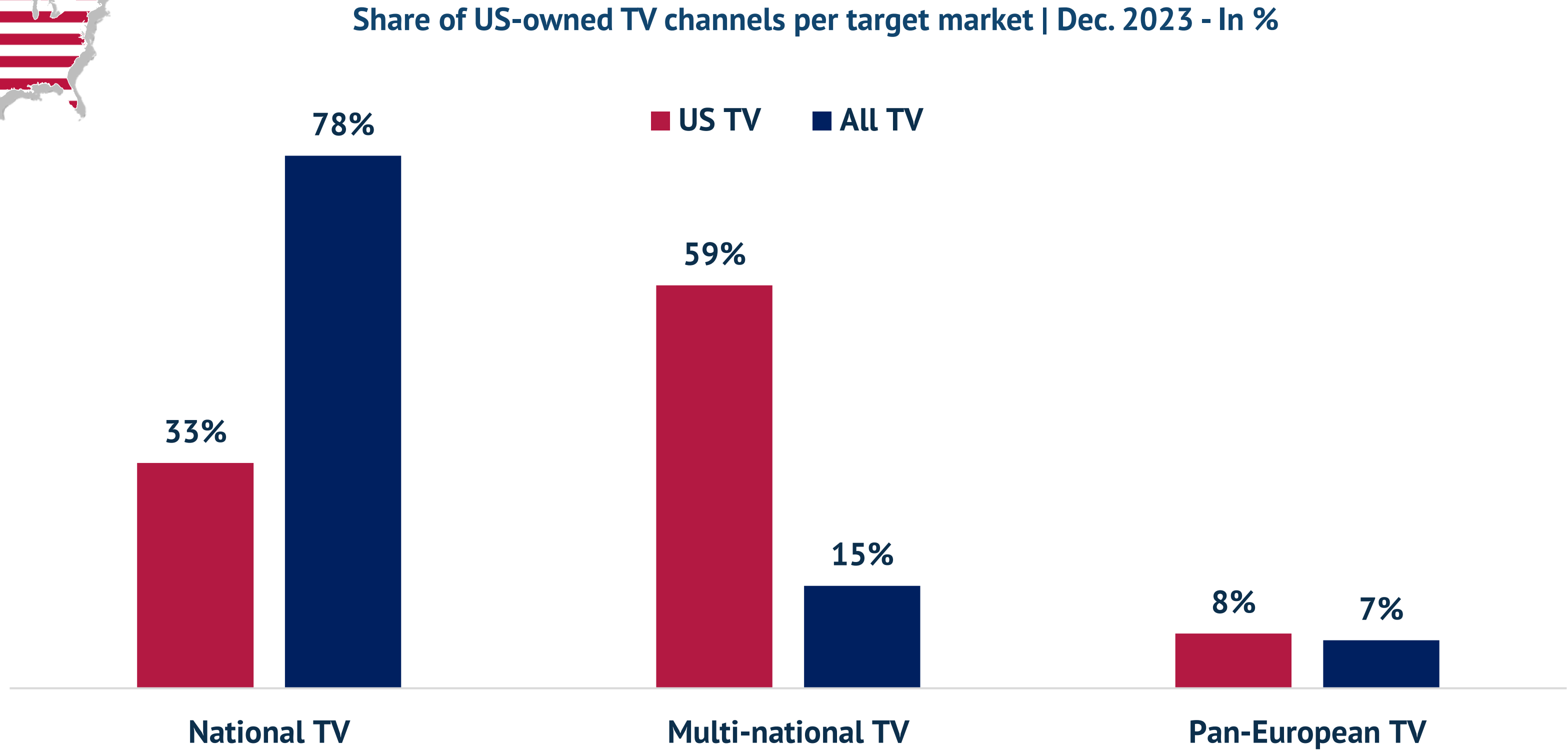
# The big picture – Markets targeted by US TV channels



***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 (7%).**

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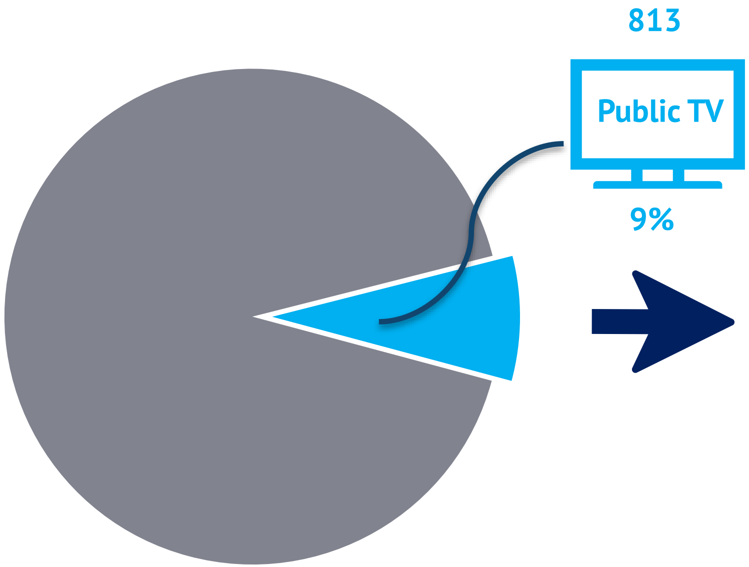
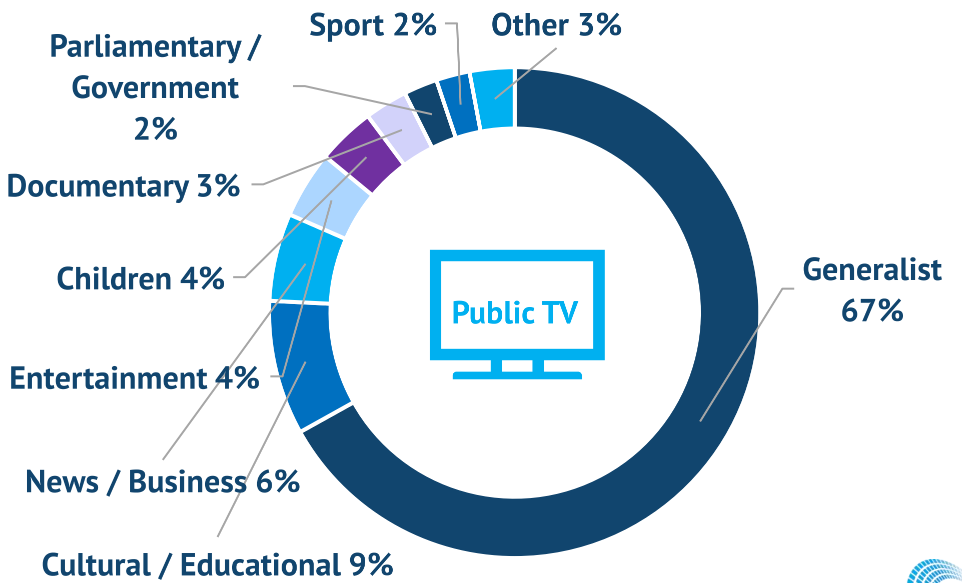
## *Around one in 10 TV channels in Europe is public.*

- **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. 2023 - In number of services and %**




**Percentage of public TV channels offering the following categories of content | Dec. 2023**



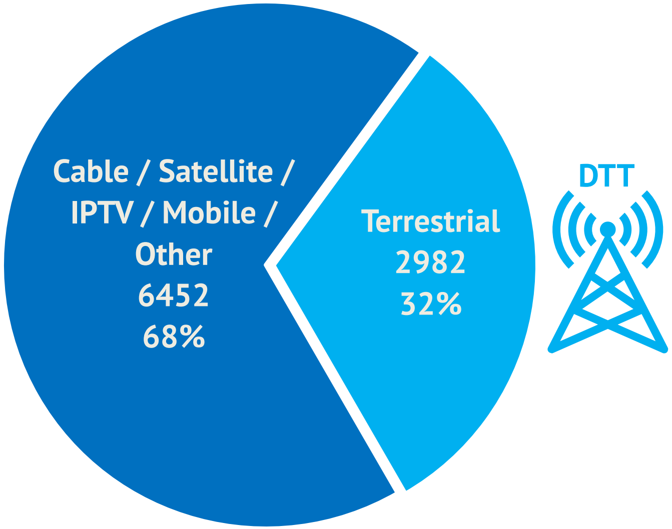

*Source: European Audiovisual Observatory / MAVISE*

# The big picture – TV channel networks

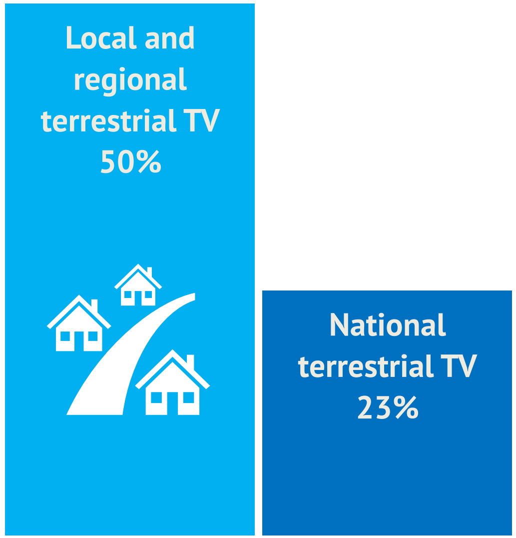
*Around one in three TV channels in Europe is available on digital terrestrial networks.*

- 32% 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 50% of local and regional TV channels are available on DTT networks, compared to 23% of national TV services.

**Breakdown of all TV channels by network type | Dec. 2023 - In number of services and %**




**Share of local and regional and national TV on terrestrial networks | Dec. 2023 - In %**




*Source: European Audiovisual Observatory / MAVISE*

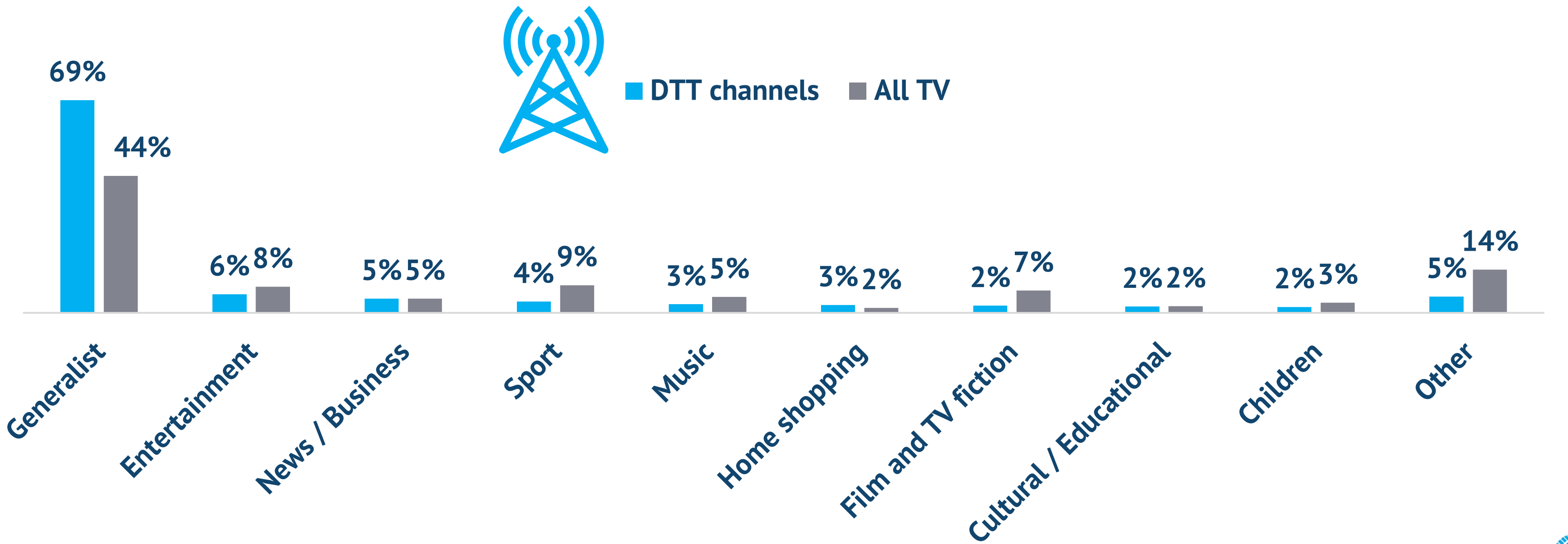
# The big picture – DTT channel programming



***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. 2023**



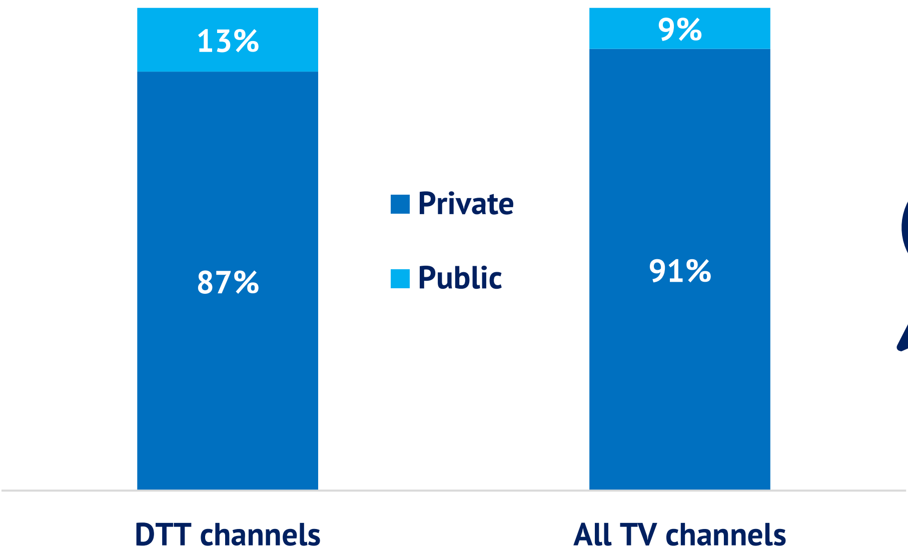

*Source: European Audiovisual Observatory / MAVISE*

# The big picture – DTT channel ownership

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

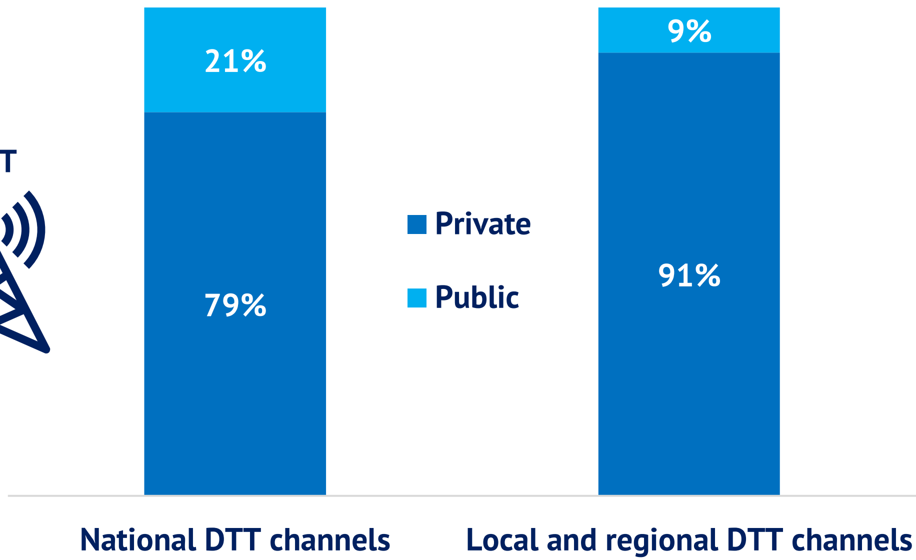
- **The share of TV channels in public ownership distributed on DTT networks is slightly higher than among the overall number of TV channels available in Europe.**
- **There are more national public TV channels available on DTT networks than public local and regional TV.**

**Comparison of TV channels on DTT and all TV channels by ownership | Dec. 2023 - In %**




DTT

**Comparison of national vs. local and regional TV channels on DTT by ownership | Dec. 2023 - In %**

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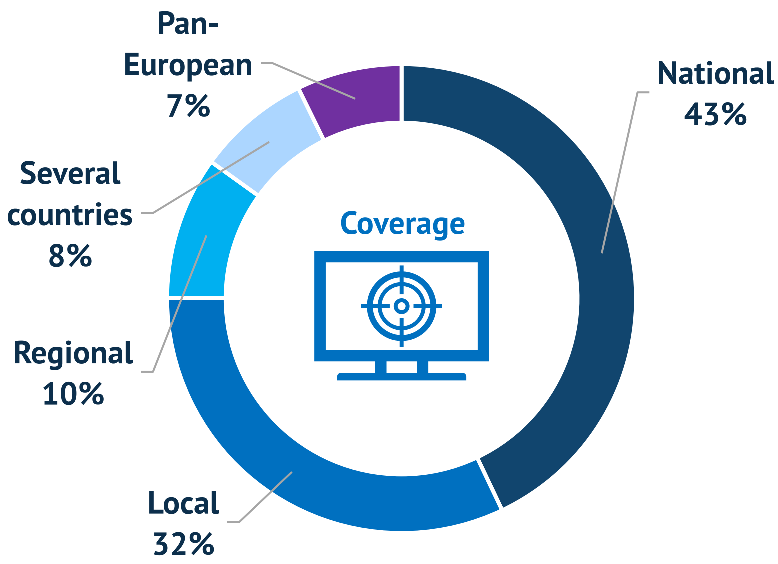
*Source: European Audiovisual Observatory / MAVISE*

# The big picture – TV channel coverage

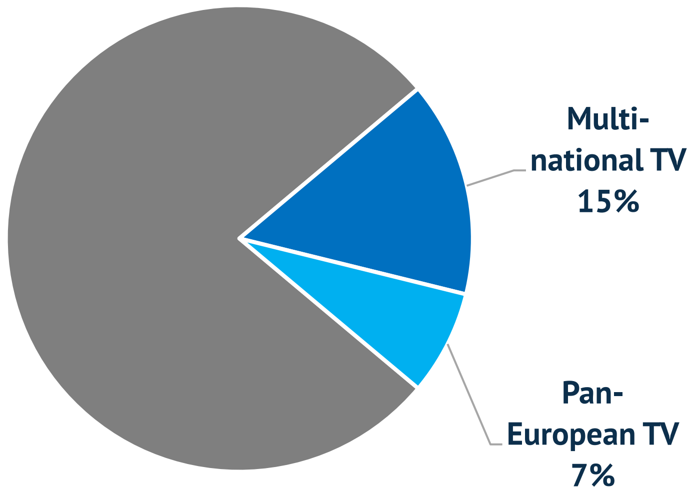
*The majority (78%) of TV channels in Europe primarily serves national markets.*

- There are just as many TV channels with local and regional as those with national coverage.
- Around 15% 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. 2023 – In %**




**Share of multi-national* and pan-European TV channels by target markets | Dec. 2023 - In %**



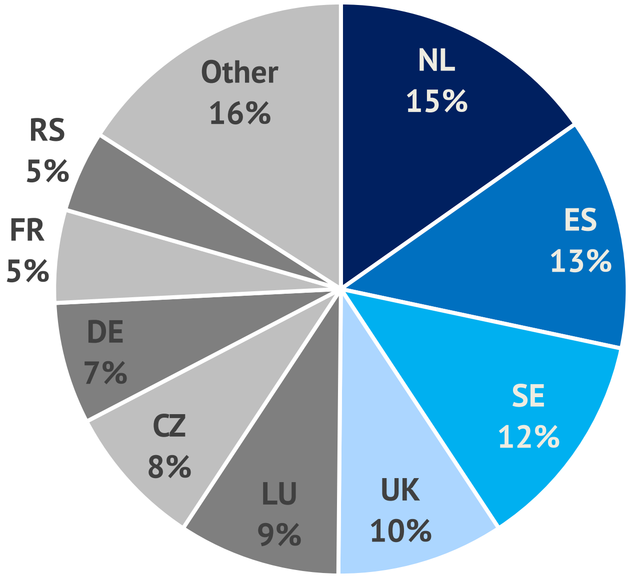

* *Multi-national TV channels are those targeting at least one specific market outside the country of establishment.*
*Source: European Audiovisual Observatory / MAVISE*

# The big picture – Multi-national TV channel hubs

***There are 1,412 TV channels in Europe exclusively targeting multi-national markets.***

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

**Main hubs for multi-national TV channels | Dec. 2023 - In %**




**Examples of multi-national TV networks based in top 3 hubs | Dec. 2023**

**1**


**US: Paramount (Nick Jr., Nick Toons, Nickelodeon), Warner Bros. Discovery (Animal Planet, Discovery Channel, Food Network, HGTV, TLC, Travel Channel)**
**EUR: Antenna Group (AXN), BBC (BBC Earth, BBC Entertainment)**

**2**


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

**3**


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

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*Source: European Audiovisual Observatory / MAVISE*

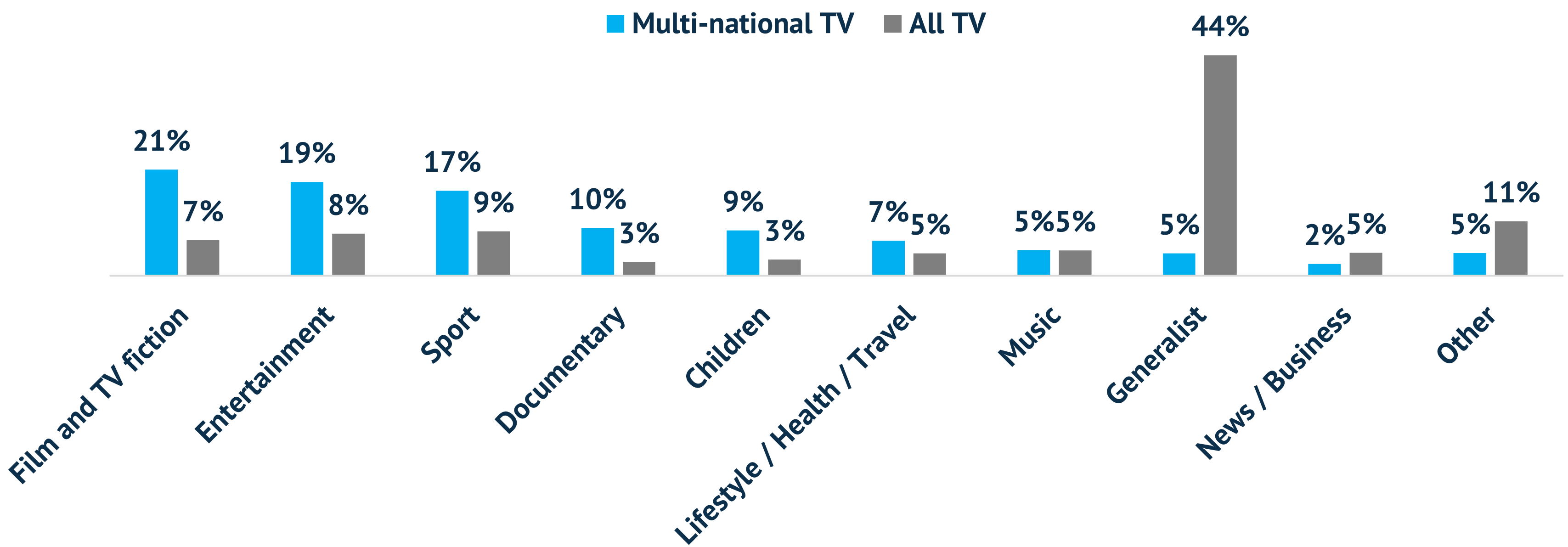
European Audiovisual Observatory

# 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. 2023**




*Source: European Audiovisual Observatory / MAVISE*

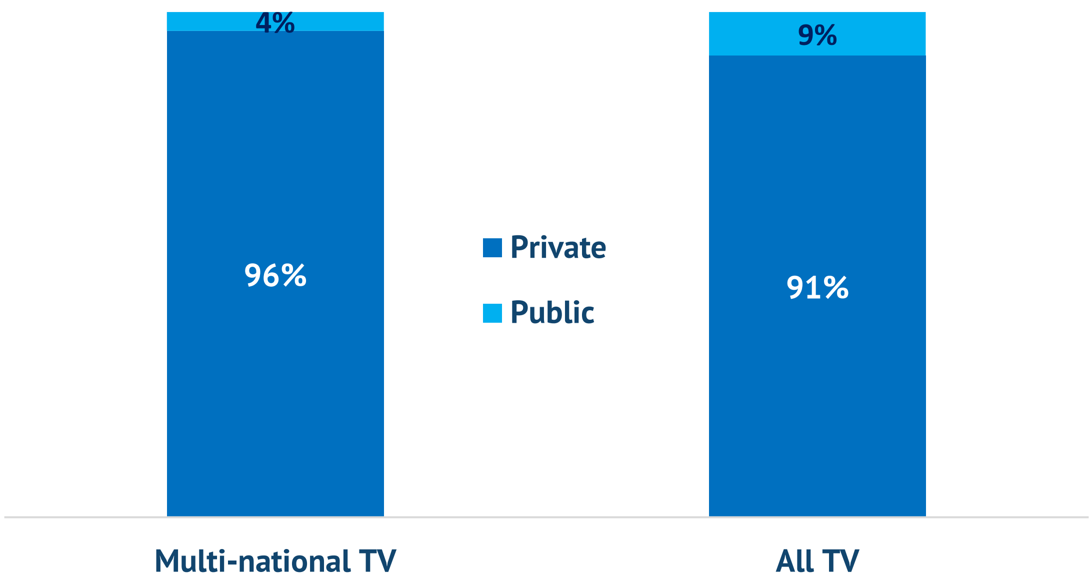
# The big picture – Ownership of multi-national TV channels



*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. 2023 - In %**



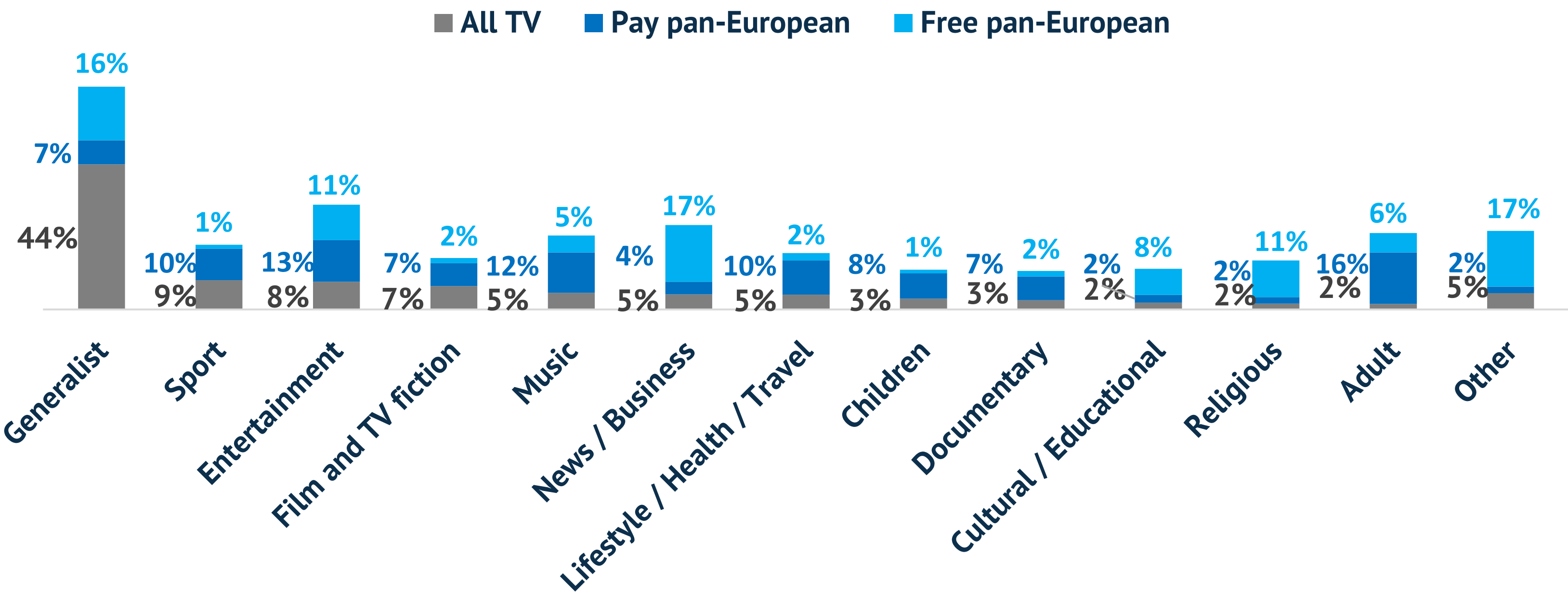

*Source: European Audiovisual Observatory / MAVISE*

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

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

- 62% 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. 2023




Source: European Audiovisual Observatory / MAVISE

European Audiovisual Observatory

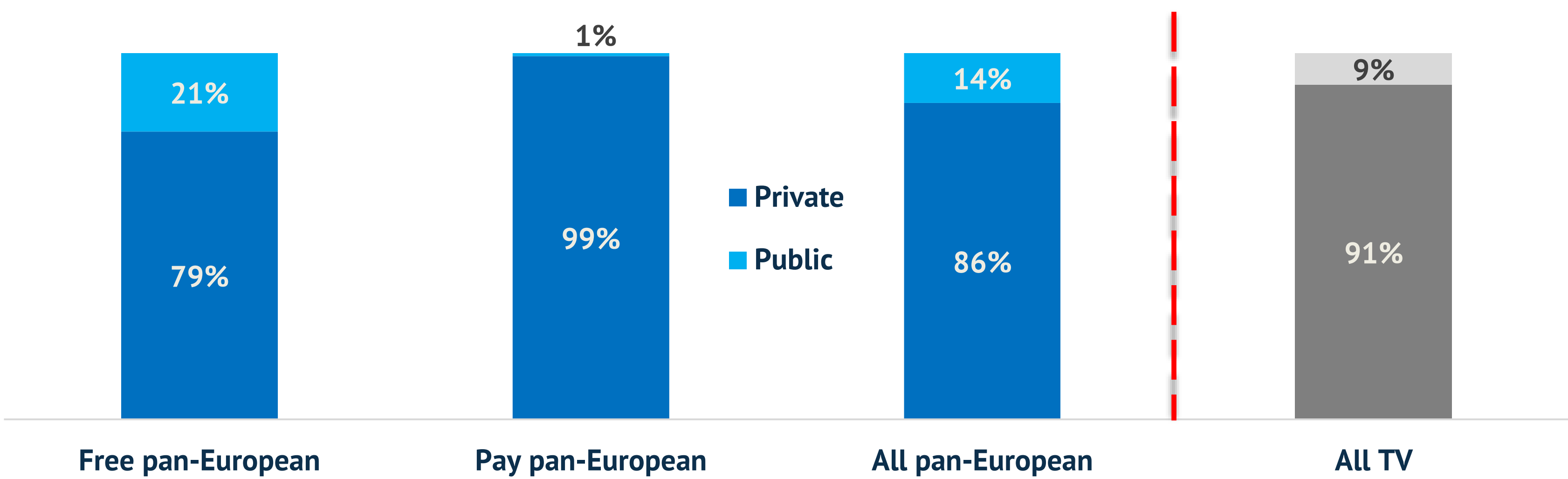
# The big picture – Ownership of pan-European TV channels



*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 are from Russia, Spain, China and Germany.**

**Breakdown of pan-European TV channels by ownership | Dec. 2023 - In %**




*Source: European Audiovisual Observatory / MAVISE*

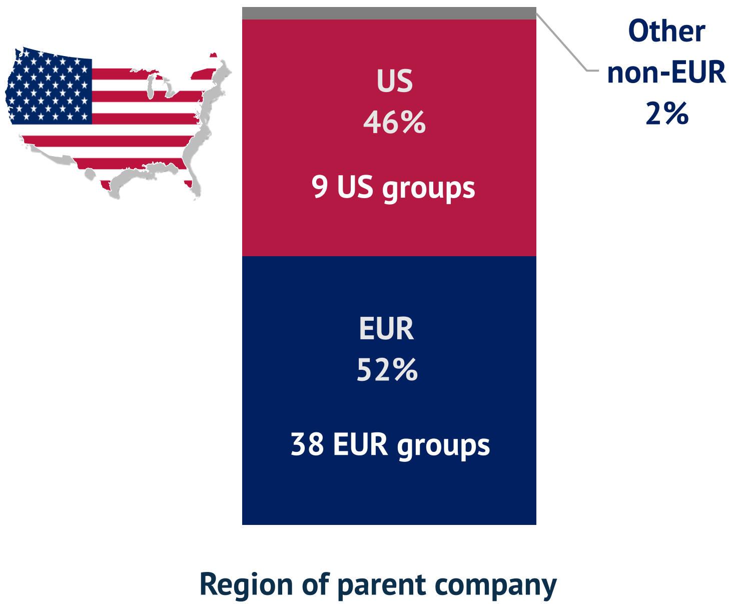
European Audiovisual Observatory

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

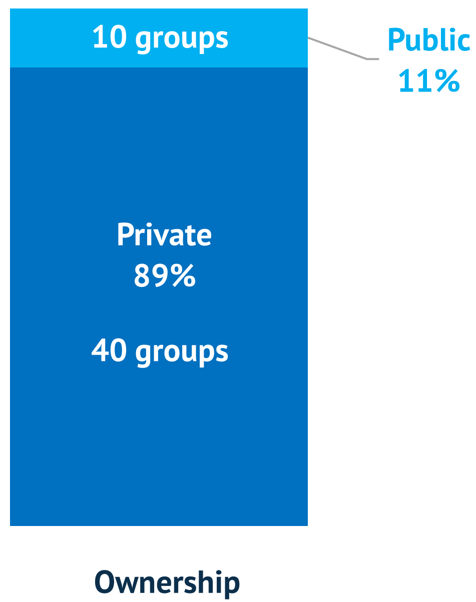
*One in two TV channels operated by the top 50 TV players* has a non-European parent company.*

- Nine US players operate the majority (46%) 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. 2023 - In %




Breakdown of TV channels operated by top 50 TV groups by ownership | Dec. 2023 - In %




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

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European Audiovisual Observatory

# 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. 2023**

| Rank | Company | Ownership | # TV |
|---|---|---|---|
| 1 | Warner Bros. Discovery (US) | Private | 363 |
| 2 | Paramount (US) | Private | 302 |
| 3 | Comcast (US) | Private | 179 |
| 4 | Groupe Canal Plus / Vivendi (FR) | Private | 123 |
| 5 | The Walt Disney Company (US) | Private | 122 |
| 6 | United Group (CZ) / BC Partners (UK) | Private | 119 |
| 7 | AMC Networks Inc (US) | Private | 73 |
| 8 | Telekom Srbija (RS) / Government of Serbia | Public | 67 |
| 9 | Pink Media Group (RS) | Private | 60 |
| 10 | RTL Group (LU) / Bertelsmann (DE) | Private | 59 |

*Source: European Audiovisual Observatory / MAVISE*

European Audiovisual Observatory

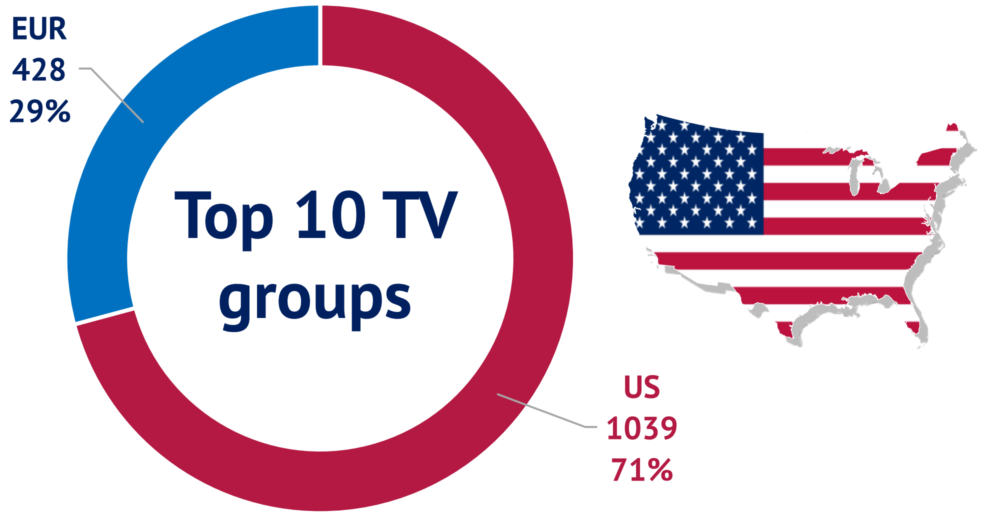
# The big picture– US share among top 10 TV players



***TV channel 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, US channel portfolios are more than twice the size of European ones.**
- **71% 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 group TV channel portfolio | Dec. 2023 - In number of services and %**

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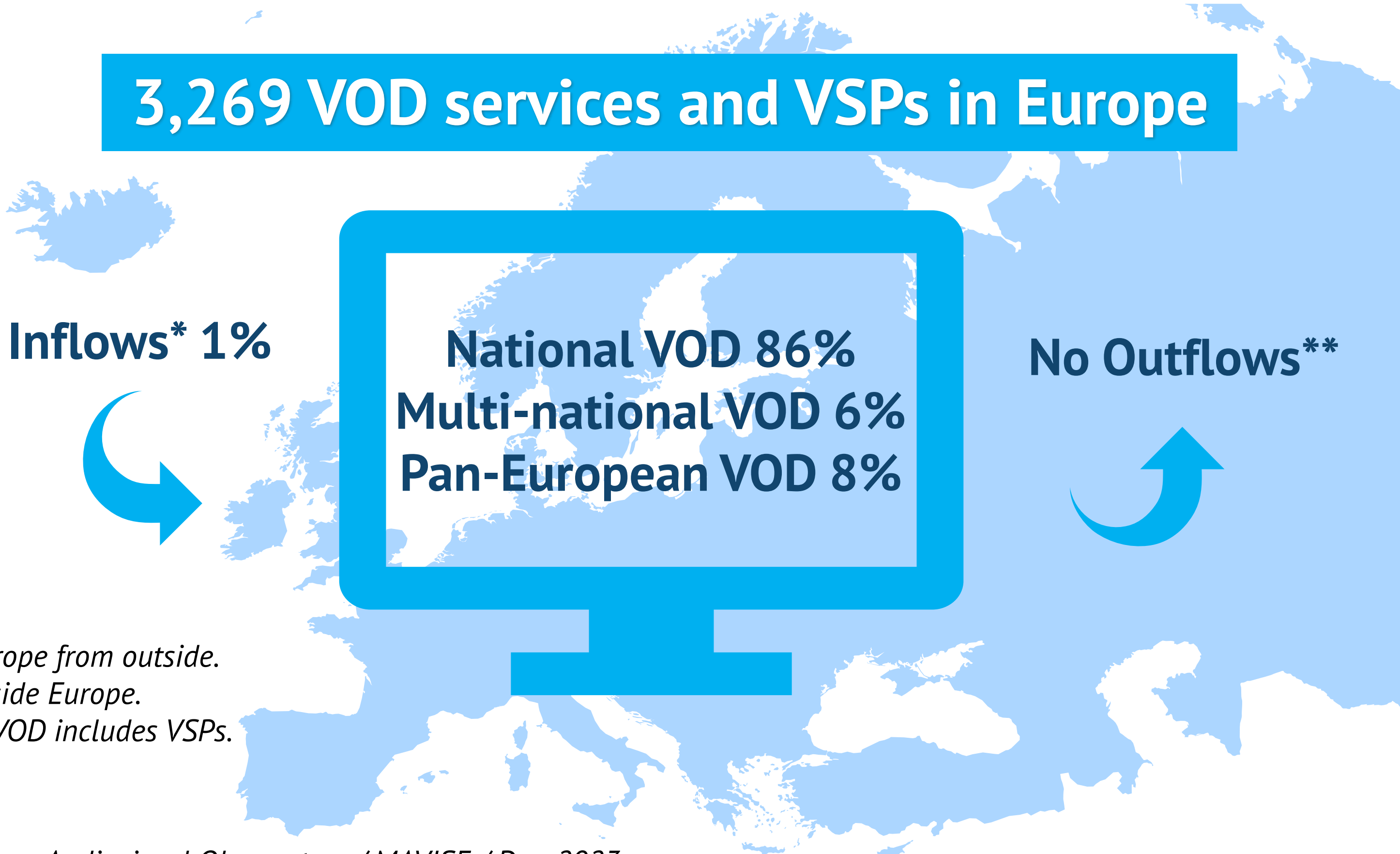
*Source: European Audiovisual Observatory / MAVISE*

# 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 (83%).***

- **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.*

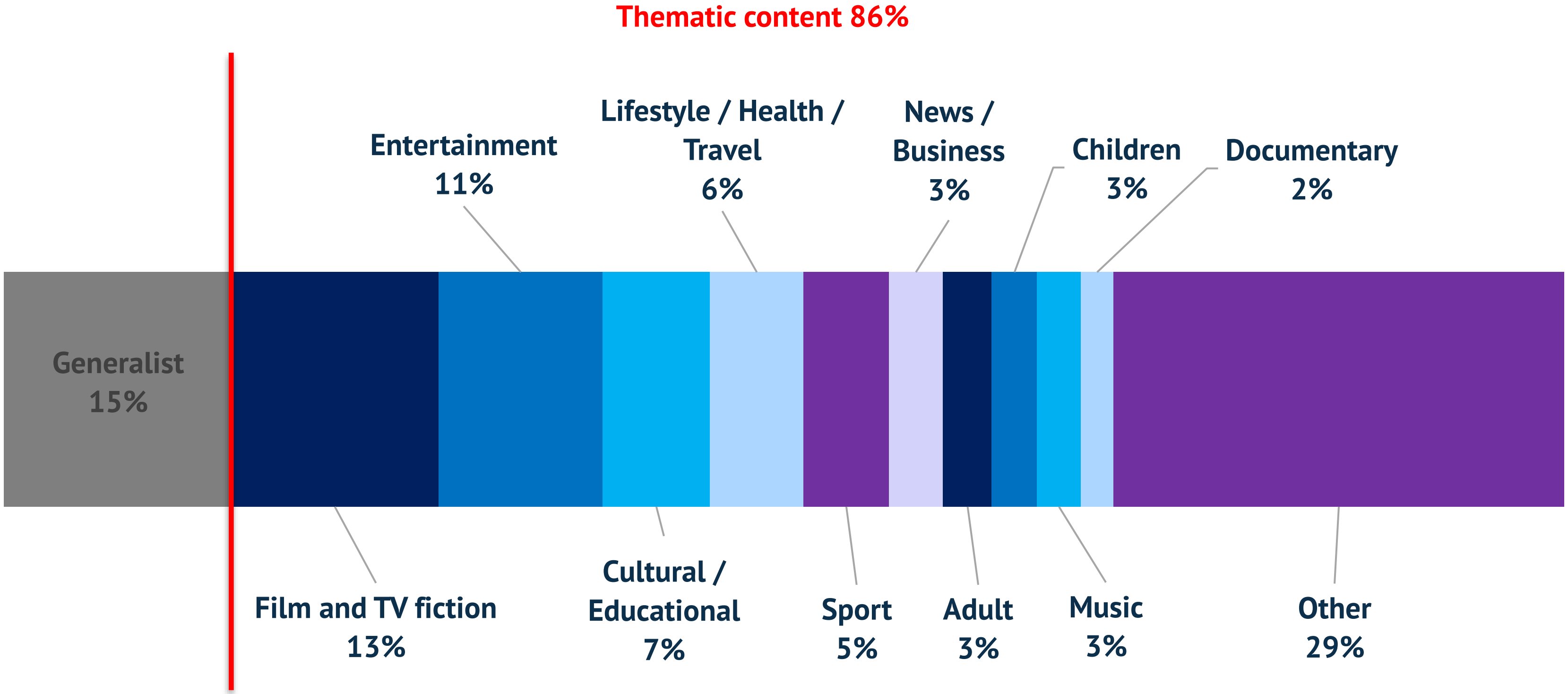
*Source: European Audiovisual Observatory / MAVISE / Dec. 2023*

# 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).**

Percentage of VOD services and VSPs offering the following categories of content | Dec. 2023




*Source: European Audiovisual Observatory / MAVISE*

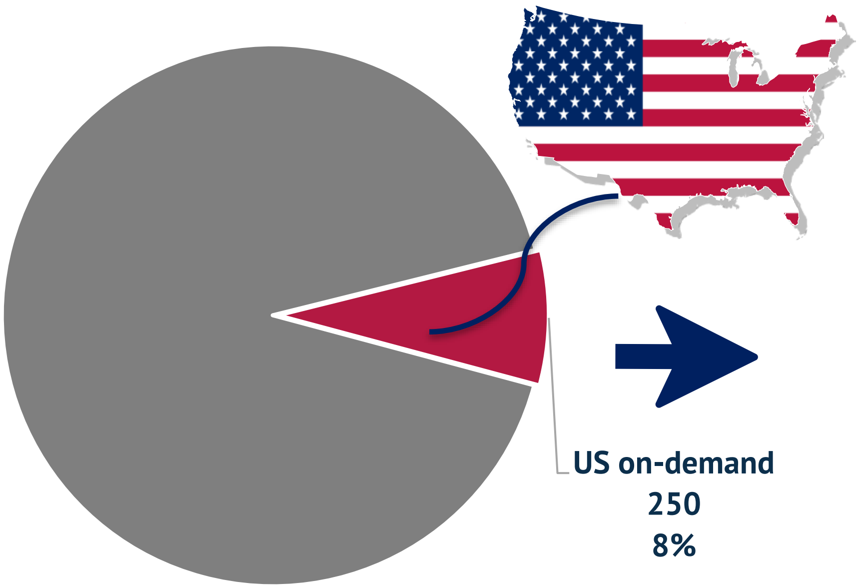
# The big picture – US-owned VOD services and VSPs



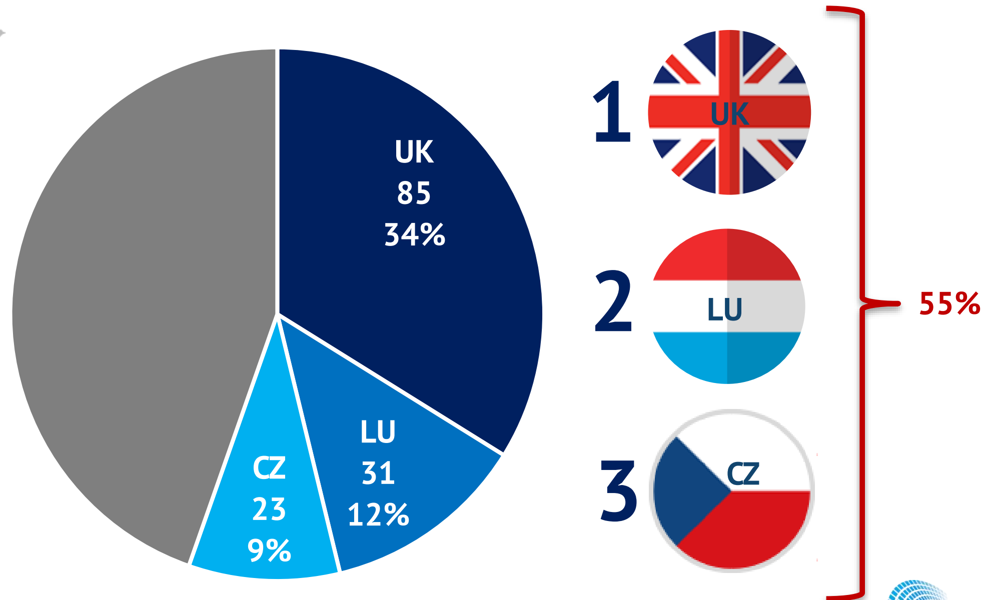
*Around one in 10 VOD services and VSPs in Europe is US-owned.*

- 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. 2023 - In number of services and %




Breakdown of US-owned VOD services and VSPs by country of origin | Dec. 2023 - In number of services and %




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

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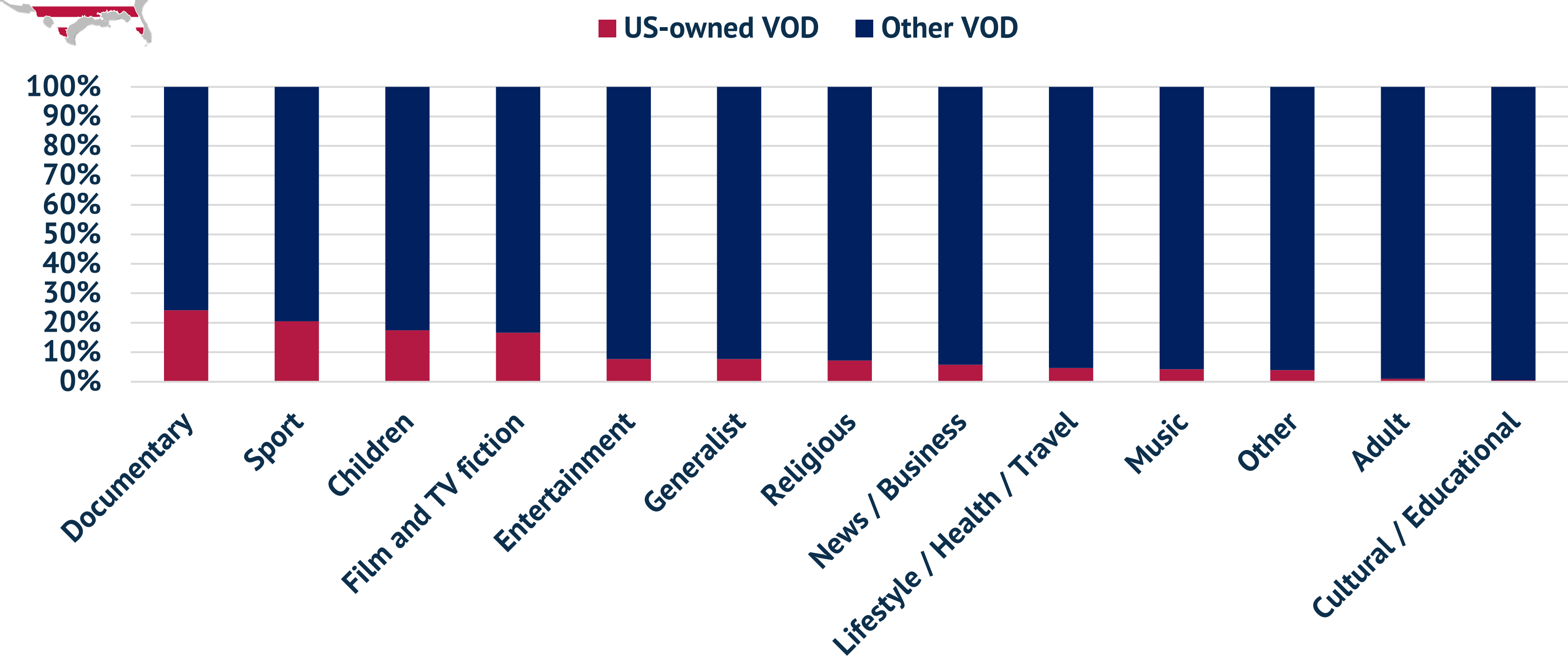
European Audiovisual Observatory

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

*Around a quarter of the documentary VOD and VSP offer in Europe is US-owned.*

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

Share of US-owned VOD services and VSPs per category of content | Dec. 2023 - In %

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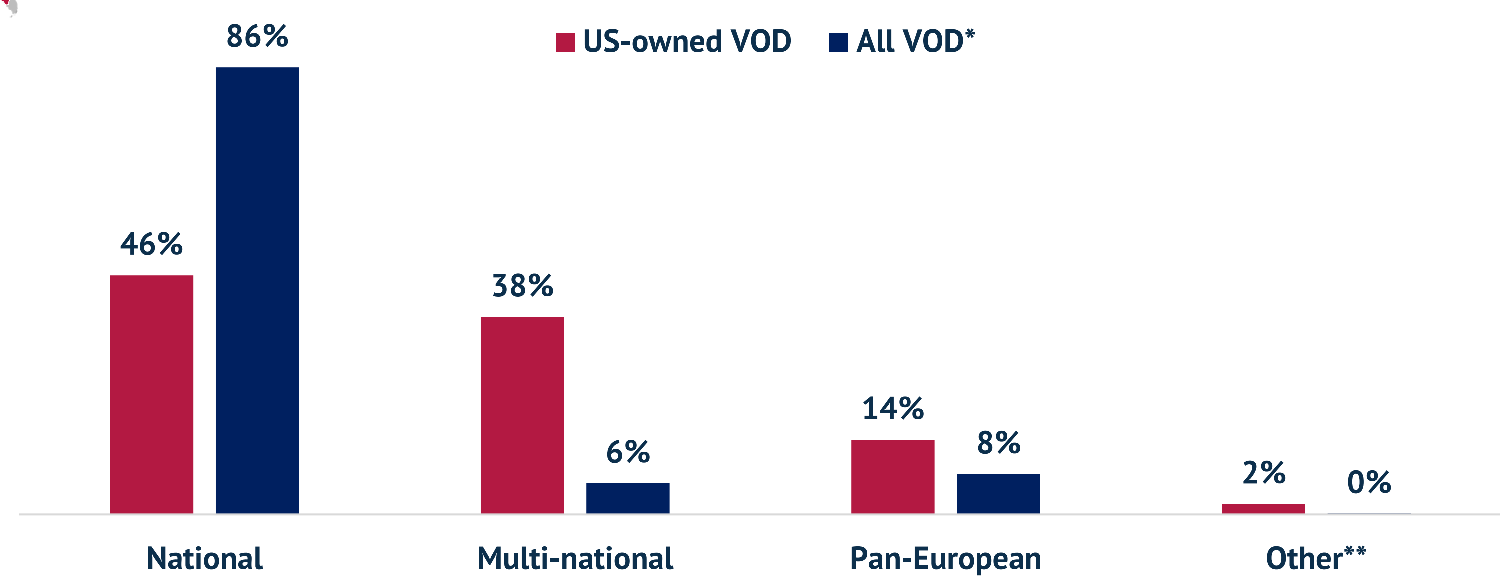
# The big picture – Markets targeted by US-owned VOD services and VSPs

*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. Around half of US services and platforms operate exclusively as national services.**

Share of US-owned VOD services and VSPs per target market | Dec. 2023 - In %




**All private VOD excl. local/regional services.*
***Other includes services targeting European markets from outside of Europe.*
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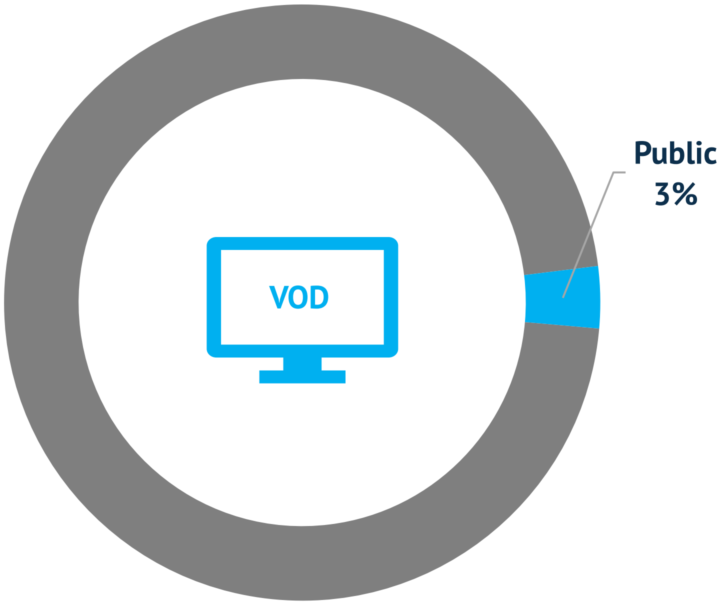
# The big picture – Ownership of VOD services and VSPs

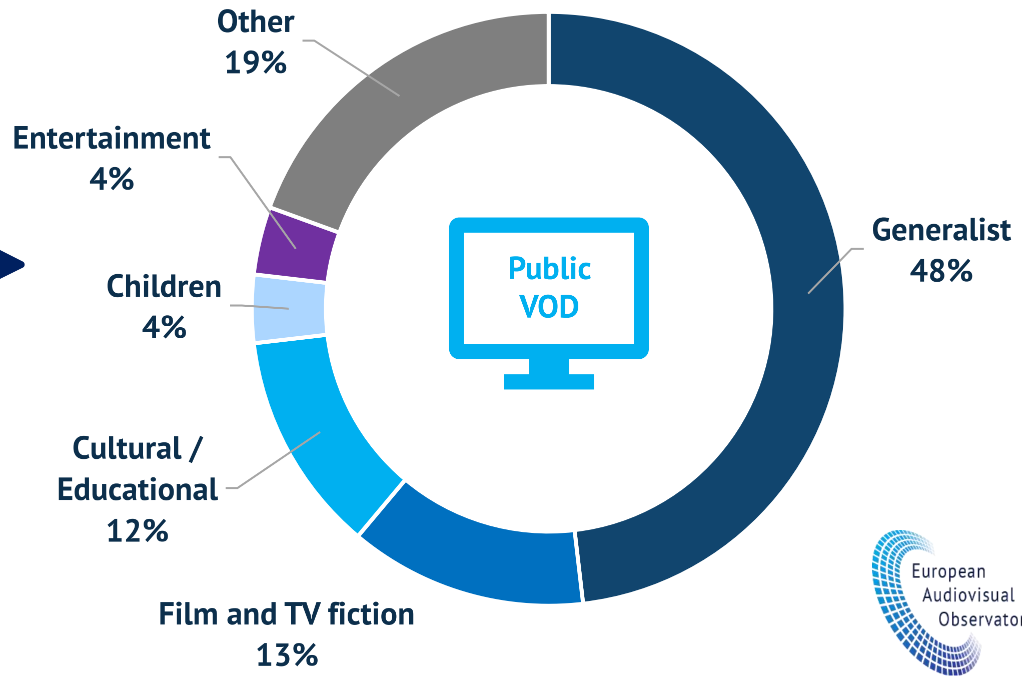
*The overwhelming majority of VOD services and VSPs in Europe are in private ownership.*

- Publicly-owned players have entered the VOD market as well, offering mostly generalist programming (48%).
- 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. 2023 - In %




Percentage of public VOD services offering the following categories of content | Dec. 2023




*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 services and the consistent registration of VOD services in the registries of national media regulatory authorities. The registration of VSPs is still ongoing.**
- **One in 10 VOD services and VSPs (12%) operates in several markets or on pan-European level.**

Breakdown of VOD services and VSPs by coverage | Dec. 2023 – In %

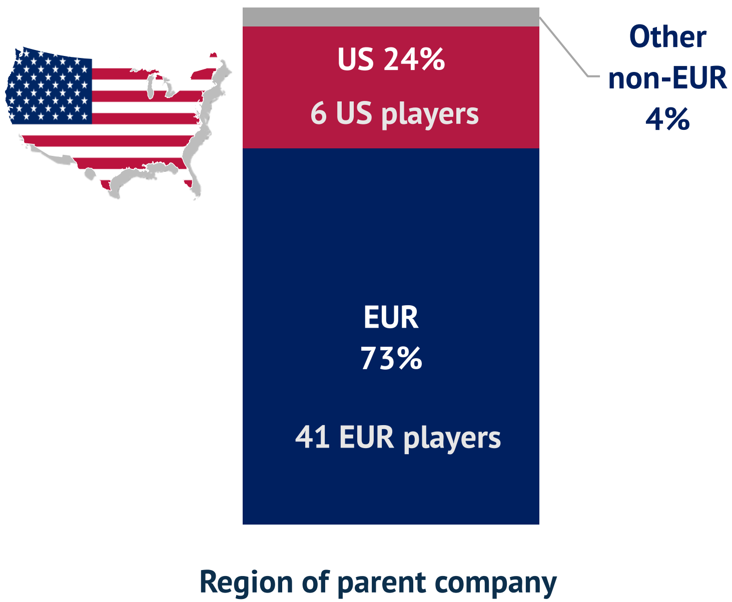

*Source: European Audiovisual Observatory / MAVISE*

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

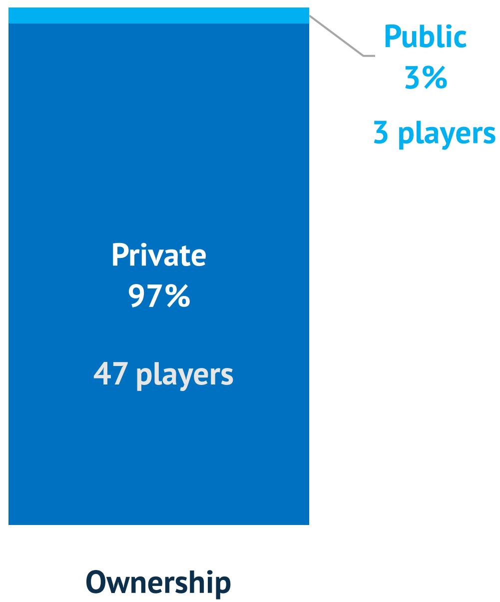
***Over a quarter of services operated by the top 50 VOD players* has a non-European parent company.***

- **Six US players operate the majority (24%) 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. 2023 - In %**




**Breakdown of services operated by top 50 groups for VOD services and VSPs by ownership | Dec. 2023 - In %**




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

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



*Diverse service portfolios push European groups in the top 10 VOD player ranking.*

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

**Top 10 VOD players by number of services | Dec. 2023**

| Rank | Company | Ownership | # TV |
|---|---|---|---|
| 1 | Warner Bros. Discovery (US) | Private | 61 |
| 2 | Comcast (US) | Private | 61 |
| 3 | Groupe Canal Plus / Vivendi (FR) | Private | 53 |
| 4 | Starmax Media (CZ) | Private | 31 |
| 5 | Polski Koncern Naftowy Orlen (PL) | Private | 30 |
| 6 | Mediawan+Leonine / Mediawan/KKR (FR/US) | Private | 29 |
| 7 | HLD Europe (LU) | Private | 27 |
| 8 | Telefonica (ES) | Private | 23 |
| 9 | DGP Media Group / EPIFIN (BE) | Private | 23 |
| 10 | Hutchison (KY) | Private | 22 |

*Source: European Audiovisual Observatory / MAVISE*

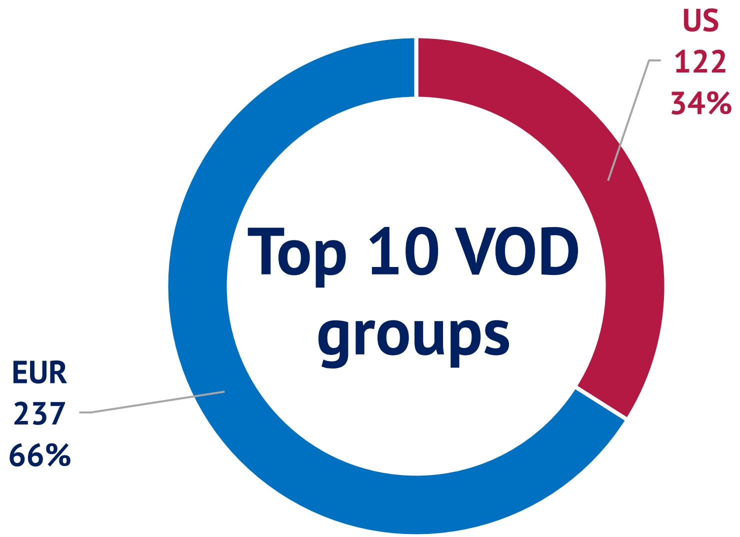
European Audiovisual Observatory

# 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.*

- 34% of VOD services and VSPs in the top 10 VOD groups belong to two US parent companies. They are Warner Bros. Discovery and Comcast.
- 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. 2023 - 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 is in private ownership.***

- **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. 2023 – In %**

**Top Private Players**

Warner Bros. Discovery
Disney
Amazon
Netflix
Comcast
Paramount
Mubi
Rakuten
Huawei
Apple
AMC Networks
V World
Vivendi
Alphabet
PPF Group
Microsoft
Axxola
Antenna Group
Love TV Channels


**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. 2023**

| Rank | Company | # Markets |
|---|---|---|
| 1 | Warner Bros. Discovery (US) | 46 |
| 2 | The Walt Disney Company (US) | 43 |
| 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 | AMC Networks Inc (US) | 32 |

| Rank | Company | # Markets |
|---|---|---|
| 11 | Apple Inc (US) | 32 |
| 12 | Vivendi (FR) | 29 |
| 13 | Alphabet (US) | 28 |
| 14 | BBC (UK) | 26 |
| 15 | V World Holdings (UK) | 26 |
| 16 | Microsoft Corporation (US) | 20 |
| 17 | Axxola (DE) | 18 |
| 18 | PPF Group (CZ) | 17 |
| 19 | Antenna Group (GR) | 15 |
| 20 | Love TV Channels (ES) | 15 |

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

European Audiovisual Observatory

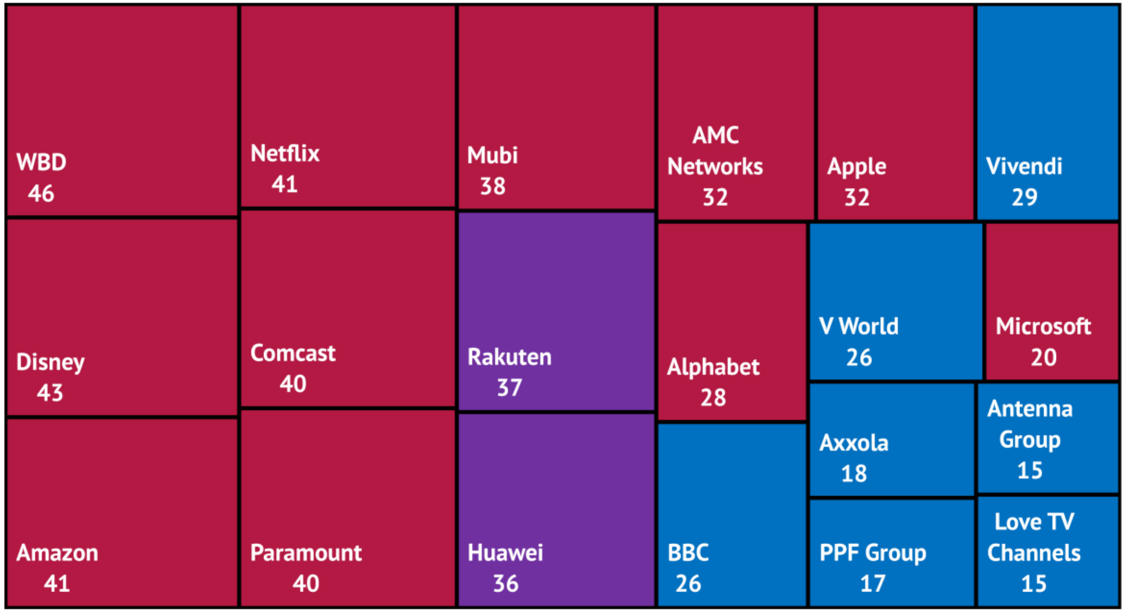
# Main players – Origin of top 20 TV and VOD players

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

- **9 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. 2023 - In number of operating markets**

11 US players




7 EUR players

2 non-EUR players

CN, JP

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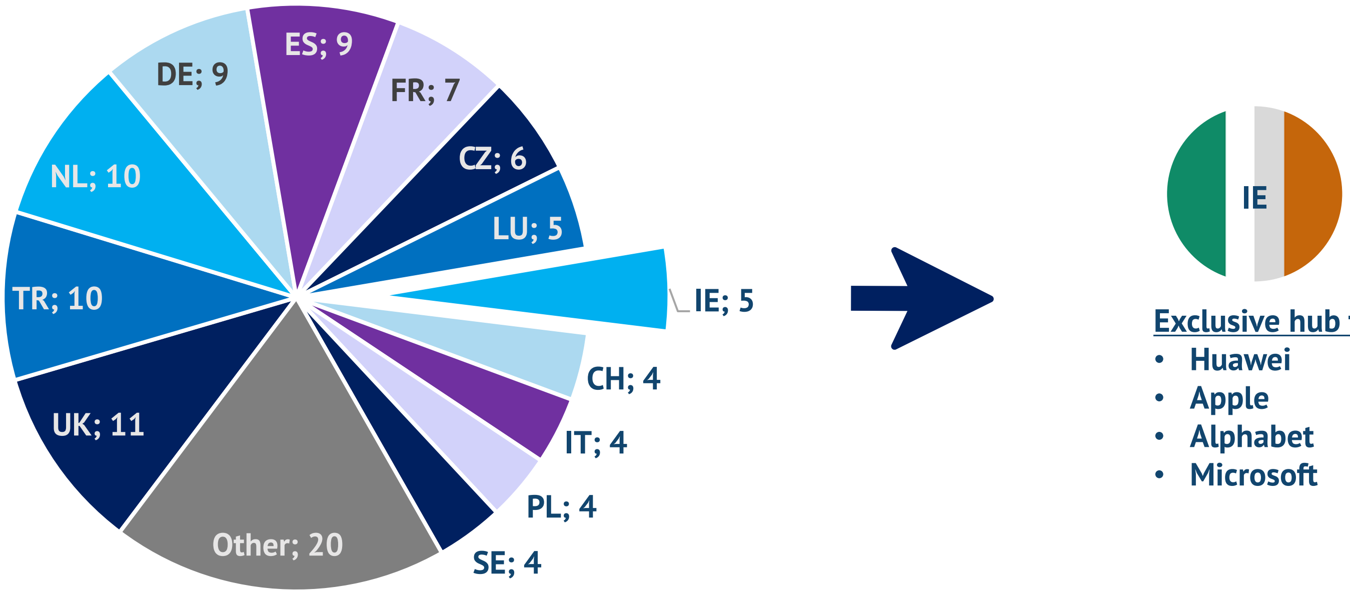
# Main players – Establishment hubs of top 20 TV and VOD players

*11 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. They are Chinese Huawei and US players Apple, Alphabet and Microsoft.**

**Establishment hubs of top 20 TV and VOD players in Europe | Dec. 2023 - 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. 2023**

| | Company | No. markets* TV+VOD \| TV \| VOD | Main brands** |
|---|---|---|---|
| **1** | Warner Bros. Discovery (US) | **∑ 46 \|** TV 44 **\|** VOD 40 | Animal Planet, Boomerang, Cartoon Network, Discovery, Eurosport, HBO MAX, ID, TLC |
| **2** | The Walt Disney Company (US) | **∑ 43 \|** TV 42 **\|** VOD 37 | 24 Kitchen, Disney Channel, ESPN, Fox, 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 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 6-10 TV and VOD players (2/4)



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

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

**Top 6-10 TV and VOD players by number of presences in markets* | Dec. 2023**

| | 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** | AMC Networks Inc (US) | **∑ 32 \|** TV 28 **\|** VOD 13 | AMC TV, JimJam, Spektrum TV, Sundance TV, TV Paprika, Acorn TV, Shudder |

**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 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.*

- **Apple and Alphabet are players whose presence is typically driven by VOD markets.**
- **Vivendi, the BBC, and V World are multi-brand players with an emphasis on TV market presences.**
- **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. 2023**

| | Company | No. markets* TV+VOD \| TV \| VOD | Main brands** |
|---|---|---|---|
| **11** | Apple Inc (US) | **∑ 32** \| TV -- \| VOD 32 | Apple TV+, iTunes Store |
| **12** | Groupe Canal Plus / Vivendi (FR) | **∑ 29** \| TV 27 \| VOD 14 | Canal+, Ciné+, Filmbox+ |
| **13** | Alphabet (US) | **∑ 28** \| TV -- \| VOD 28 | Google TV/Play, YouTube Movies and TV |
| **14** | BBC (UK) / Government of United Kingdom | **∑ 26** \| TV 24 \| VOD 7 | BBC Brit, BBC Earth, BBC First, Cbeebies, BBC iPlayer, Britbox International |
| **15** | Viasat World / V World Holdings (UK) | **∑ 26** \| TV 26 \| VOD 2 | Epic Drama, TV1000, Viasat |

**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 Axxola are single-brand players whose presence is typically driven by VOD markets.**
- **PPF Group, Antenna Group and Love TV Channels are players with an emphasis on TV market presences.**

**Top 16-20 TV and VOD players by number of presences in markets* | Dec. 2023**

| | Company | No. markets*<br>TV+VOD \| TV \| VOD | Main brands** |
|---|---|---|---|
| **16** | Microsoft Corporation (US) | **∑ 20** \| TV -- \| VOD 20 | Microsoft Movies & TV, Microsoft Start |
| **17** | Rlaxx TV / Axxola (DE) | **∑ 18** \| TV -- \| VOD 18 | Rlaxx TV |
| **18** | PPF Group (CZ) | **∑ 17** \| TV 17 \| VOD 6 | bTV, Nova, Pro, Voyo |
| **19** | Antenna Group (GR) | **∑ 15** \| TV 15 \| VOD 5 | ANT, AXN |
| **20** | Love TV Channels (ES) | **∑ 15** \| TV 15 \| VOD -- | Love The Planet |

**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*

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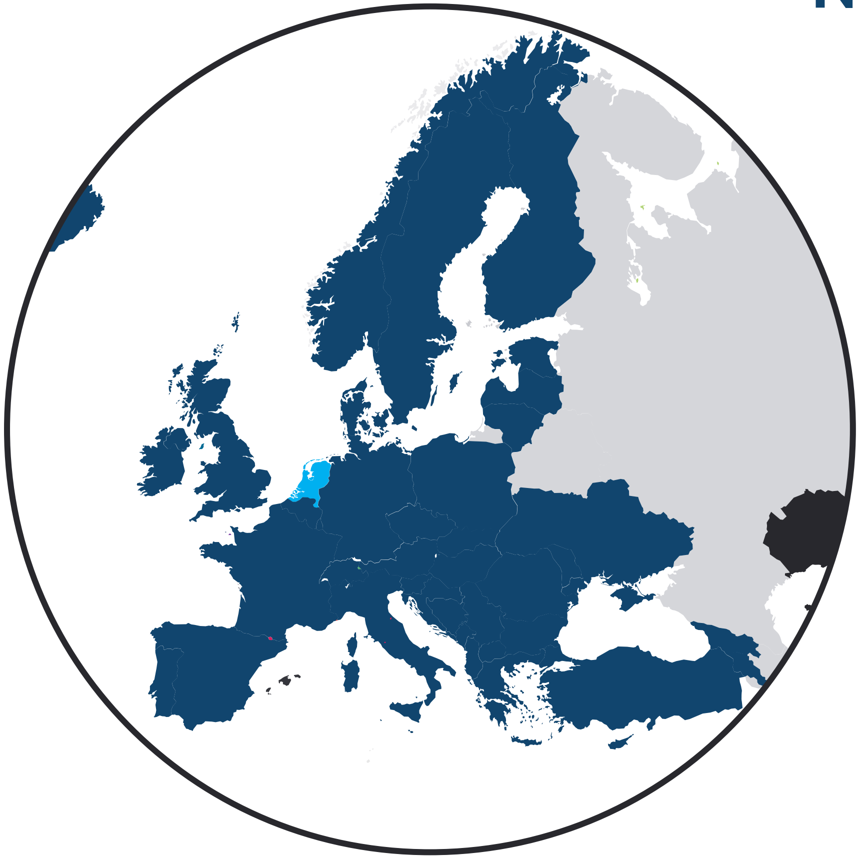
# Main players – Case studies



# 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

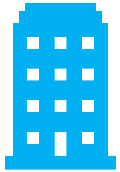
European Audiovisual Observatory

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


*Source: European Audiovisual Observatory / MAVISE / Dec. 2023*

## Vivendi (HQ in FR)

**Vivendi is based in a limited number of countries, from where it serves 29 European TV and VOD markets**



**9 Countries of establishment**
**AT, DE, ES, FR, LU, NL, PL, TR, UK**

**17 EEA markets**
AT, DE, BE, BG, CZ, DE, EE, FR, HR, HU, IT, LT, LV, NL, PL, RO, SI, SK

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

European Audiovisual Observatory

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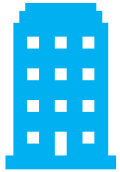
# WBD (HQ in US)

**Warner Bros. Discovery is based in several countries, from where it serves 46 European TV and VOD markets**



## 13 Countries of establishment

CZ, DE, ES, FI, FR, IE, IT, NL, NO, PL, SE, 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

## 16 Other European markets*

AL, AM, BA, BY, CH, GE, MC, MD, ME, MK, RS, SM, TR, UA, UK, VA

** Incl. microstates.*



*Source: European Audiovisual Observatory / MAVISE / Dec. 2023*

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