# Audiovisual media services in Europe

## Market insights

Agnes Schneeberger
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European Audiovisual Observatory

COUNCIL OF EUROPE

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This report is based on 2018 data from the MAVISE database http://mavise.obs.coe.int/

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## I. Supply of AV services in Europe

- At the end of 2018, there were **11 123 TV channels** available in Europe*. Of these **5 039 were local TV** channels. Further, there were **2 917 on-demand services**** available in Europe*, including services established outside of Europe which target the European markets; these comprised 1 624 catch-up TV services, 1 081 pay-on-demand services and 212 free on-demand services.
- There were **5 880 TV channels** established in Europe* (excluding local channels) at the end of 2018. Of these **4 470** were based in the **EU28**. Of the TV channels established in Europe* 8% were publicly owned while 91% belonged to a private company and 1% had a mixed ownership (similar figures for the EU28); around 28% of TV channels were available in HD format and the same percentage had a catch-up TV service on offer; around 4% of TV channels had a time-shifted version (identical figures for the EU28).
- At the end of 2018, there were **4 838 TV broadcasting licences** in Europe* (excluding local licences). Of these **3 555** were issued in the **EU28**.

*Europe includes the EU28, Albania, Armenia, Bosnia and Herzegovina, Georgia, Iceland, Liechtenstein, Montenegro, North Macedonia, Norway, the Russian Federation, Switzerland, Turkey and Morocco

**Figures for on-demand services available in Europe include both free and pay services

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# Executive summary

## I. Supply of AV services in Europe

- Of the **968 pay-on-demand services** established in Europe* **853** were based in the **EU28**; among these, just 2% were owned by public service broadcasting organisations and 1% had a mixed ownership.
- The **United Kingdom** was by and large the most prominent audiovisual market in wider Europe with **1 230 TV channels** and **201 pay-on-demand services** established in the country, many of which were targeting other European audiovisual markets.
- European AV services cater for a variety of specialist interests and target audiences. Seven out of 10 **TV channels** established in Europe* in 2018 belonged to the genres generalist (19%), film and TV fiction (13%), sport (13%), entertainment (11%), music (7%), children (6%) and lifestyle/leisure/health/travel (6%). Unlike linear services, where genre distribution was more balanced, **pay-on-demand genres** were more concentrated, with 80% accounting for film and TV fiction (64%) and generalist (16%) services (similar results yielded for the EU28).

*Europe includes the EU28, Albania, Armenia, Bosnia and Herzegovina, Georgia, Iceland, Liechtenstein, Montenegro, North Macedonia, Norway, the Russian Federation, Switzerland, Turkey and Morocco

## II. Access and distribution of AV services in Europe

- One out of five **television services** established in the Europe* by 2018 was accessible via **digital terrestrial television (20%)**, and the rest could be accessed via **cable**, **satellite**, or **Internet protocol television** (IPTV).
- Most **television channels** were **pay/or premium** services while 41% established in Europe were available **free-to-air.** The results were similar for the EU28.
- The dominant business model for **pay-on-demand** services was subscription video-on-demand **(SVOD) (59%)**, which came before transactional video-on-demand **(TVOD) (41%)**.

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## III. Targeting AV services in Europe

- More than **one fifth of all TV channels** (21%; n=917) and **over a third** (36%; n=306) **of pay-on-demand services** based in the **EU28** were specifically targeting other **EU28** markets. In Europe* 19% (n=1136) of TV channels and 43% (n=413) of pay-on-demand services were serving non-domestic markets. They were predominantly owned by large broadcasting and entertainment corporations, the majority of which are **of American origin****.
- As with television (i.e. Europe n=563; EU28 n=477), the **United Kingdom** was in 2018 by far the **major hub** for **pay-on-demand** services targeting foreign markets with a total of **130 services** aimed at other European markets. Of these **99** were serving the **EU28** alone.
- The **United Kingdom**, the **Czech Republic** and **Luxembourg** accounted for **69%** of all **TV channels** targeting other EU28 markets, and so were **75%** of **pay-on-demand services** based in the **United Kingdom**, **Ireland** and the **Netherlands**.

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**For more information on the market power of US groups regarding European TV audience market shares see the Observatory report "The internationalisation of TV audience markets in Europe" (2019) https://rm.coe.int/the-internationalisation-of-tv-audience-markets-in-europe/168094ea72

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# I. Supply* of AV services in Europe

*Television channels that are established in a country include those that hold a broadcasting licence from and/or are registered with a national media regulatory authority. The data also includes TV services that may not hold a licence or registration but can be attributed to a specific national origin by means of company address etc. Figures for TV channels available in a country refer to linear services established in a country and serving the domestic market, services that target the country and free/pay satellite channels.

As regards on-demand services, MAVISE tracks the most relevant services from an economic perspective, based on market shares, ownership or large geographic coverage. Figures for on-demand services established and available in a country follow the same principles as mentioned above.

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# I. Key trends of AV services available in Europe

## Television channels

- At the end of 2018, there were **11 123 TV channels** available in Europe*. Of these **5 039** were **local TV channels**.

## On-demand services

- At the end of 2018, there were **2 917 on-demand services**** available in Europe*, including services established outside of Europe which target the European markets; these comprised **1 624 catch-up TV** services, **1 081 pay-on-demand** services and **212 free on-demand** services.

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**On-demand services include both free and pay services

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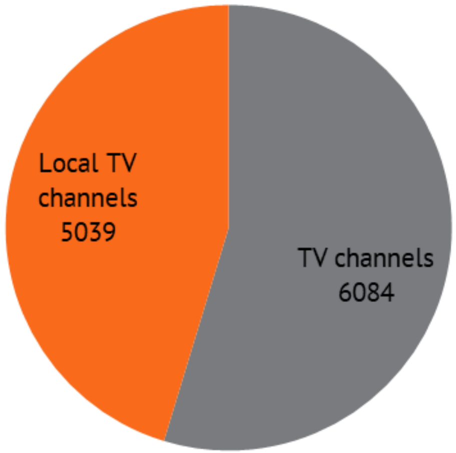
# I. Overview of AV services available in Europe

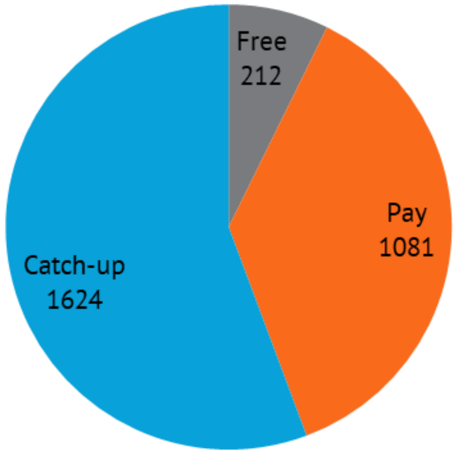
**Breakdown by type of audiovisual media services available in EUR40 + Morocco | 2018 - In total numbers**

**Total 11 123**




**Television channels**

**Total 2 917**




**On-demand services**

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# I. Key trends of AV services established in Europe

## Television channels

- At the end of 2018, there were **5 880 TV channels** established in Europe* (excluding local channels). Of these **4 470** were based in the **EU28**.
- Of the **TV channels** established in Europe* 8% were **publicly** owned while 91% belonged to a **private** company and 1% had a **mixed ownership** (similar figures for the EU28); around 28% of TV channels were available in **HD format** and the same percentage had a **catch-up TV** service on offer; around 4% of TV channels had a **time-shifted** version (identical figures for the EU28).
- At the end of 2018, there were **4 838 TV broadcasting licences** in Europe* (excluding local licences). Of these **3 555** were issued in the **EU28**.

## Pay-on-demand services

- At the end of 2018, there were **968 pay-on-demand services** established in Europe*. Of these **853** were based in the **EU28** with just 2% owned by **public** service broadcasting organisations and 1% which had a **mixed ownership**.

*Europe includes the EU28, Albania, Armenia, Bosnia and Herzegovina, Georgia, Iceland, Liechtenstein, Montenegro, North Macedonia, Norway, the Russian Federation, Switzerland, Turkey and Morocco

# I. Key trends of AV services established in Europe – focus on television channels

- Market size, varying economic conditions, cultural proximity to other countries and individual licensing regimes all play a part in explaining the sometimes significant **differences** between **national television landscapes**, particularly with regard to the total number of services based in a country.
- The **United Kingdom** was by and large the **most prominent** audiovisual market in the EU28 and wider Europe with the highest number of services established in the country. There were **1 230 TV channels** and **201 pay-on-demand services**, many of which were targeting other European audiovisual markets.
- Other large European audiovisual markets included the Russian **Federation** in second place, with a total of **588 TV channels**, followed by **Germany** (i.e. 369), **Italy** (i.e. 297), **France** (i.e. 291), **Spain** (i.e.276) and **Turkey** (i.e. 254).
- Overall, two out of five European* countries had **more than 100 television channels** established in their territories, among which were also smaller audiovisual markets including the **Netherlands** (i.e. 253), the **Czech Republic** (i.e. 225), **Bulgaria** (i.e. 177), **Greece** (153) and **Romania** (i.e. 152).

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# I. Key trends of AV services established in Europe – focus on on-demand services

- Typically, audiovisual markets with a high concentration of linear television channels tend to also be home to a significant number of **pay-on-demand services**. This includes the **United Kingdom** (i.e. 201) as the leading market where *Amazon Prime*, *Disney Movies*, *Fox Play*, *natGeo+*, *MUBI* and *Sony Play Station Store* serve various other European markets. Other markets with a significant number of pay-on-demand services include **France** (i.e. 78), **Germany** (i.e. 49), **Spain** (i.e. 43), the **Russian Federation** (i.e. 37) and **Poland** (i.e. 31).

- Overall, **one out of four European* countries** had more than **20 pay-on-demand services** established in their territories, among which were a number of smaller audiovisual markets, including **Ireland** (i.e. 125), home to *Google Play* and *YouTube Premium*, *iTunes* and *Microsoft Store*, the **Netherlands** (i.e. 74), the European headquarter of **Netflix,** and **Sweden** (i.e. 43), where *HBO Nordic* is based.

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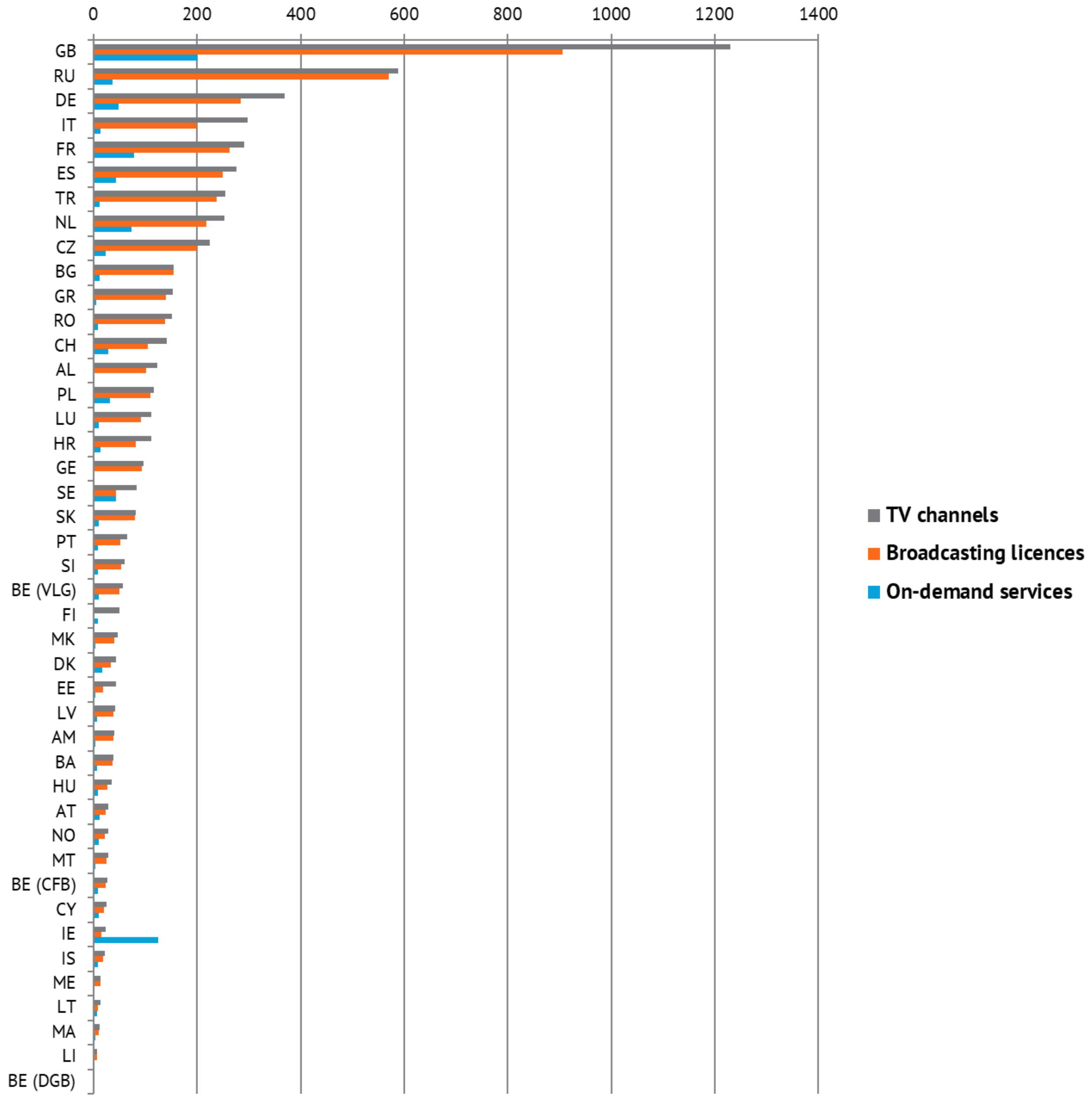
# I. Overview of AV services established in Europe

AV services by country of establishment in EUR40 + Morocco | 2018 - In number of services

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# I. Concentration tendencies of AV services established in the EU28

- The territorial establishment of audiovisual media services was somewhat more concentrated among **pay-on-demand services** than among TV channels. The cumulated numbers of services based in the **United Kingdom**, **Germany**, **Italy** and **France** accounted for **49% of all TV channels,** and **56% of all pay-on-demand** services were established in the **United Kingdom**, **Ireland**, **France** and the **Netherlands**. The top 10 countries accounted for over three quarters of all linear (77%) and pay-on-demand services (80%), respectively.

- The **United Kingdom** was by and large the **biggest contributor** to the overall audiovisual services supply in the **EU28**. Around one quarter of all TV channels (28%) and pay-on-demand services (24%) were established there.

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# I. Concentration tendencies of AV services established in the EU28

## Concentration of TV channels and pay-on-demand services established in the EU28 | 2018 - In number of services and % share

**Television**

| Country | Total national | % share of EU total | Cumulative % |
|---|---|---|---|
| GB | 1230 | 28% | 28% |
| DE | 369 | 8% | 36% |
| IT | 297 | 7% | 42% |
| FR | 291 | 7% | 49% |
| ES | 276 | 6% | 55% |
| NL | 253 | 6% | 61% |
| CZ | 225 | 5% | 66% |
| BG | 177 | 4% | 70% |
| GR | 153 | 3% | 73% |
| RO | 152 | 3% | 77% |
| PL | 117 | 3% | 79% |
| LU | 112 | 3% | 82% |
| HR | 111 | 2% | 84% |
| SE | 83 | 2% | 86% |
| SK | 82 | 2% | 88% |
| PT | 65 | 1% | 89% |
| SI | 60 | 1% | 91% |
| BE (VLG) | 57 | 1% | 92% |
| FI | 50 | 1% | 93% |
| DK | 44 | 1% | 94% |
| EE | 43 | 1% | 95% |
| LV | 41 | 1% | 96% |
| HU | 35 | 1% | 97% |
| AT | 29 | 1% | 97% |
| MT | 28 | 1% | 98% |
| BE (CFB) | 27 | 1% | 99% |
| CY | 25 | 1% | 99% |
| IE | 23 | 1% | 100% |
| LT | 13 | 0% | 100% |
| BE (DGB) | 2 | 0% | 100% |
| Total EU 28 | 4470 | 100% | 100% |

**Pay-on-demand**

| Country | Total national | % share of EU total | Cumulative % |
|---|---|---|---|
| GB | 201 | 24% | 24% |
| IE | 125 | 15% | 38% |
| FR | 78 | 9% | 47% |
| NL | 74 | 9% | 56% |
| DE | 49 | 6% | 62% |
| ES | 43 | 5% | 67% |
| SE | 43 | 5% | 72% |
| PL | 31 | 4% | 75% |
| CZ | 24 | 3% | 78% |
| DK | 16 | 2% | 80% |
| HR | 14 | 2% | 82% |
| IT | 14 | 2% | 83% |
| BG | 12 | 1% | 85% |
| AT | 11 | 1% | 86% |
| BE (VLG) | 10 | 1% | 87% |
| CY | 10 | 1% | 89% |
| LU | 10 | 1% | 90% |
| SK | 10 | 1% | 91% |
| HU | 9 | 1% | 92% |
| PT | 9 | 1% | 93% |
| RO | 9 | 1% | 94% |
| SI | 9 | 1% | 95% |
| BE (CFB) | 8 | 1% | 96% |
| FI | 8 | 1% | 97% |
| LT | 7 | 1% | 98% |
| LV | 7 | 1% | 99% |
| GR | 5 | 1% | 99% |
| EE | 4 | 0% | 100% |
| MT | 3 | 0% | 100% |
| Total EU 28 | 853 | 100% | 100% |

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# I. Genre analysis of thematic AV services established in Europe

- The European television and pay-on-demand market is characterised by an array of **thematic services** catering to a variety of specialist interests and target audiences.
- **Seven out of 10 TV channels** established in Europe* in 2018 belonged to one of the following **genres**: generalist (19%), film and TV fiction (13%), sport (13%), entertainment (11%), music (7%), children (6%) and lifestyle/leisure/health/travel (6%). The aggregated total of these top seven genres was the equivalent of **75% of all television channels** established in wider Europe. The results were similar for the EU28.
- **80% of all pay-on-demand** audiovisual services established in Europe* in 2018 were divided between **two genres**. Unlike linear services, where genre distribution was more balanced, **pay-on-demand** genres were more concentrated, with the **top five accounting for 91%** of the total share: film and TV fiction (64%), generalist (16%), adult (4%), entertainment (4%) and children (3%). Similar results were yielded for the EU28.

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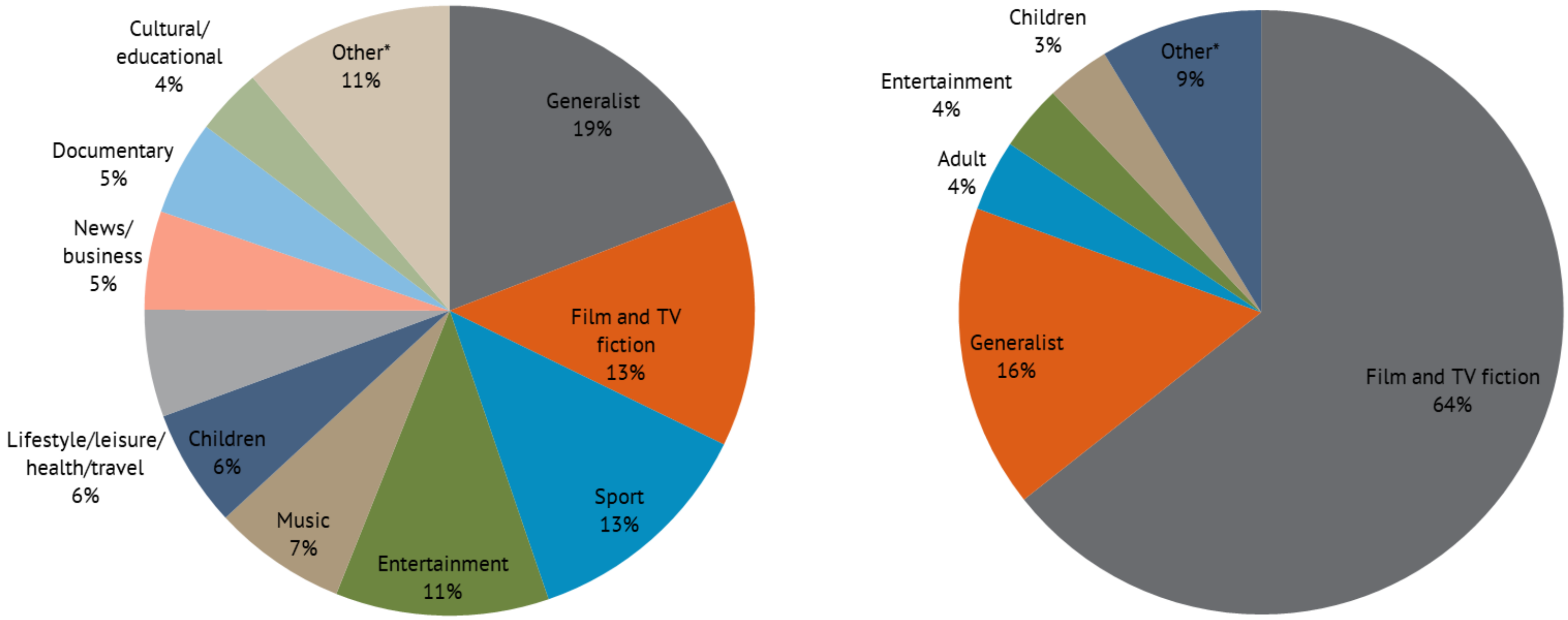
# I. Overview of genres of AV services established in Europe

Breakdown by genre of audiovisual media services established in EUR40 + Morocco | 2018 - In % share




**Television** **Pay-on-demand**

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# II. Access and distribution of AV services in Europe

# II. Access and distribution of AV services in Europe

- One out of five **television services** established in the Europe* by 2018 was accessible via **digital terrestrial television (20%)**, and the rest could be accessed via **cable**, **satellite**, or **Internet protocol television** (IPTV).
- Most **television channels** were **pay/or premium** services while 41% established in Europe were available **free-to-air**. The results were similar for the EU28.
- The dominant business model for **pay-on-demand** services was subscription video-on-demand **(SVOD) (59%)**, which came before transactional video-on-demand **(TVOD) (41%)**.

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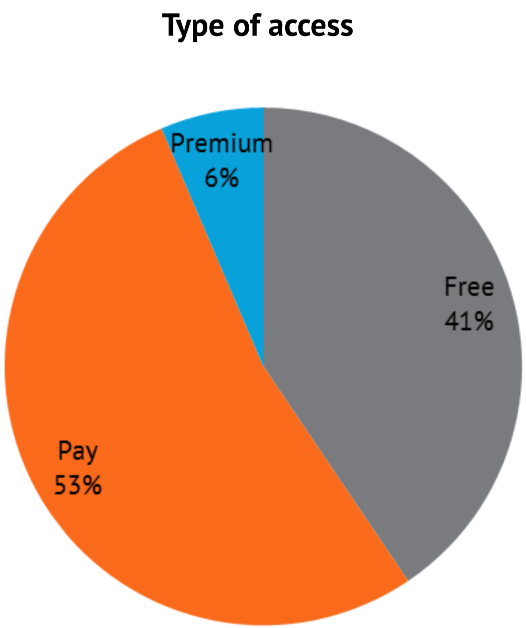
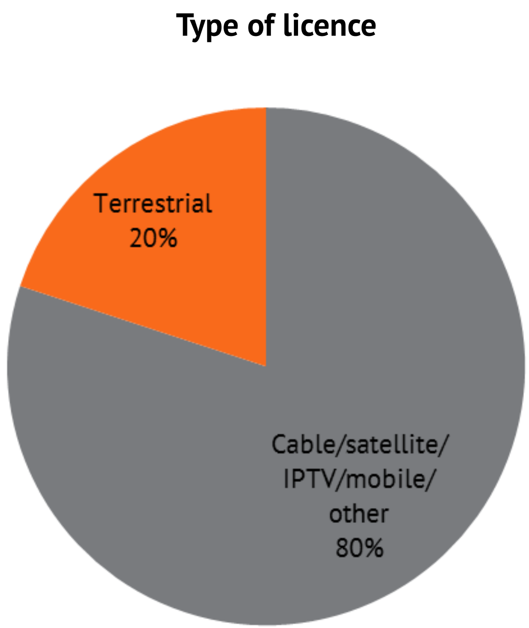
# II. Overview of access and distribution of television channels in Europe

Breakdown of TV channels established in EUR40 + Morocco by type of access and kind of licence | 2018 - In % share

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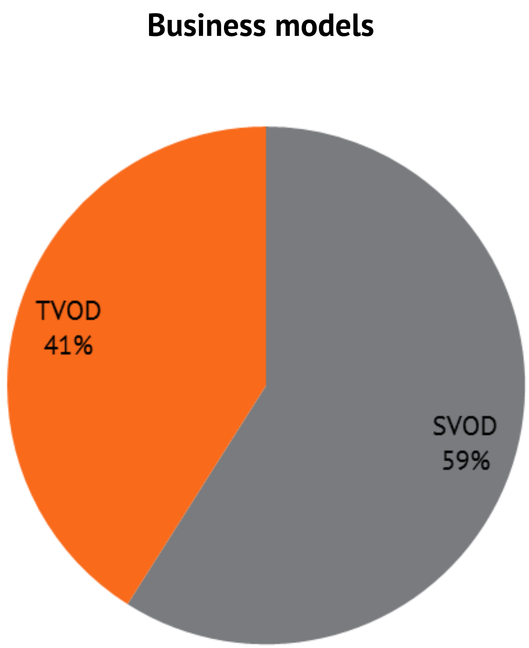
# II. Business models of pay-on-demand services in Europe

Breakdown of pay-on-demand audiovisual services established in EUR40 + Morocco by business model | 2018 - In % share



# III. AV services in Europe targeting* other countries

*Indicators used in the MAVISE database to define whether a channel is specifically targeting another national market include linguistic versions in the targeted country's main language(s) (e.g. sub-titling, dubbing), content of the licence (e.g. explicit mentioning of the targeted country), local programming, local advertising, local subscription. It excludes TV channels that are targeting their own country of establishment, pan-European pay/free satellite channels and TV channels that are targeting countries other than the Observatory members and EU candidate countries.

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# III. Audiovisual media services targeting other countries

- There is a series of **hubs** in **Europe*** from where audiovisual media services **serve several countries**. These hubs are home to numerous pan-European **brand channels** and **pay-on-demand services** predominantly owned by large broadcasting and entertainment corporations, the majority of which are **of American origin****.

- The establishment of services targeting other markets has a significant effect on a number of **national licensing regimes** as they tend to be regionally concentrated and can notably expand the overall number of services based in a country.

- More than **one fifth of all TV channels** (21%; n=917) and over **a third** (36%; n=306) **of pay-on-demand services** based in the **EU28** were specifically targeting other **EU28** markets. In **Europe** 19% (n=1136) of TV channels and 43% (n=413) of pay-on-demand services were serving non-domestic markets.

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**For more information on the market power of US groups regarding European audience market shares see the Observatory report "The internationalisation of TV audience markets in Europe" (2019) https://rm.coe.int/the-internationalisation-of-tv-audience-markets-in-europe/168094ea72

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# III. Audiovisual media services targeting other countries

- Well over **two thirds of linear and pay-on-demand services** established in the **EU28** by 2018, and targeting other **EU28** markets, were concentrated in just three countries: The **United Kingdom**, the **Czech Republic** and **Luxembourg** accounted for 69% of all **TV services** targeting other EU28 markets, and so were 75% of **pay-on-demand** services based in the **United Kingdom**, **Ireland** and the **Netherlands**. Similar results were yielded for services based in Europe* targeting other European countries.

- The **United Kingdom**, home to **563 television channels** targeting other **European markets.** Of these **477** were serving the **EU28** alone, was the most significant European hub for linear services targeting other countries. It was followed by the **Czech Republic** (i.e. 110), **Luxembourg** (i.e. 91), **Spain** (i.e. 79), the **Netherlands** (i.e. 69) and **France** (i.e. 64).

- Targeting **TV channels** established in **Luxembourg** made up **81%** of all the services based in the country and around **half** of linear services established in the **Czech Republic** (49%) and the **United Kingdom** (46%) were targeting other European territories.

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# III. Audiovisual media services targeting other countries

- Other countries in the top 10 ranking with a significant number of **television channels** under their national licensing regimes, and targeting other European territories, included: **Sweden** (i.e. 31), **Bulgaria** (i.e. 28), **Romania** (i.e. 28) and **Germany** (i.e. 20).
- As with television, the **United Kingdom** was in 2018 by far the **major hub** for **pay-on-demand** services targeting foreign markets with a total of **130** services aimed at other **European markets** of which **99** were serving the **EU28** alone. It was closely followed by **Ireland** (i.e. 118), the **Netherlands** (i.e. 55), **Sweden** (i.e. 25), **Spain** (i.e. 21) and **Germany** (i.e. 16).
- Other noteworthy audiovisual hubs for **pay-on-demand** services targeting other European markets included the **Czech Republic** (i.e. 11), **France** (i.e. 11), **Switzerland** (i.e. 6) and **Luxembourg** (i.e. 4).
- In **Ireland 94%** of services based in the country were targeting other European markets and more than **half** of the services in the **Netherlands** (74%), the **United Kingdom** (65%) and **Sweden** (58%) were serving non-domestic markets.

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# III. Overview of audiovisual media services targeting other countries

## Audiovisual media services established in Europe primarily targeting other markets by country | 2018 - In number of services

| | Television channels targeted at EUROPE | Television channels targeted at EU28 | Pay-on-demand targeted at EUROPE | Pay-on-demand targeted at EU28 |
|---|---|---|---|---|
| GB | 563 | 477 | 130 | 99 |
| CZ | 110 | 86 | 11 | 7 |
| LU | 91 | 69 | 4 | 4 |
| ES | 79 | 62 | 21 | 20 |
| NL | 69 | 62 | 55 | 38 |
| FR | 64 | 45 | 11 | 9 |
| SE | 31 | 21 | 25 | 17 |
| BG | 28 | 12 | 0 | 0 |
| RO | 28 | 28 | 0 | 0 |
| DE | 20 | 19 | 16 | 11 |
| EE | 10 | 10 | 0 | 0 |
| IT | 6 | 5 | 4 | 4 |
| HR | 5 | 0 | 3 | 1 |
| MT | 5 | 5 | 0 | 0 |
| RU | 5 | 3 | 1 | 1 |
| IE | 4 | 4 | 118 | 91 |
| FI | 3 | 2 | 0 | 0 |
| SK | 3 | 3 | 0 | 0 |
| CH | 2 | 1 | 6 | 6 |
| GR | 2 | 2 | 0 | 0 |
| LV | 2 | 2 | 0 | 0 |
| AT | 1 | 1 | 1 | 1 |
| DK | 1 | 1 | 3 | 2 |
| IS | 1 | 1 | 0 | 0 |
| LI | 1 | 1 | 0 | 0 |
| PL | 1 | 1 | 0 | 0 |
| TR | 1 | 1 | 0 | 0 |
| CY | 0 | 0 | 4 | 2 |

Note: No AV services targeting other markets in AL, AM, BA, BE, CY, GE, HU, LT, MA, ME, MK, NO, PT, SI

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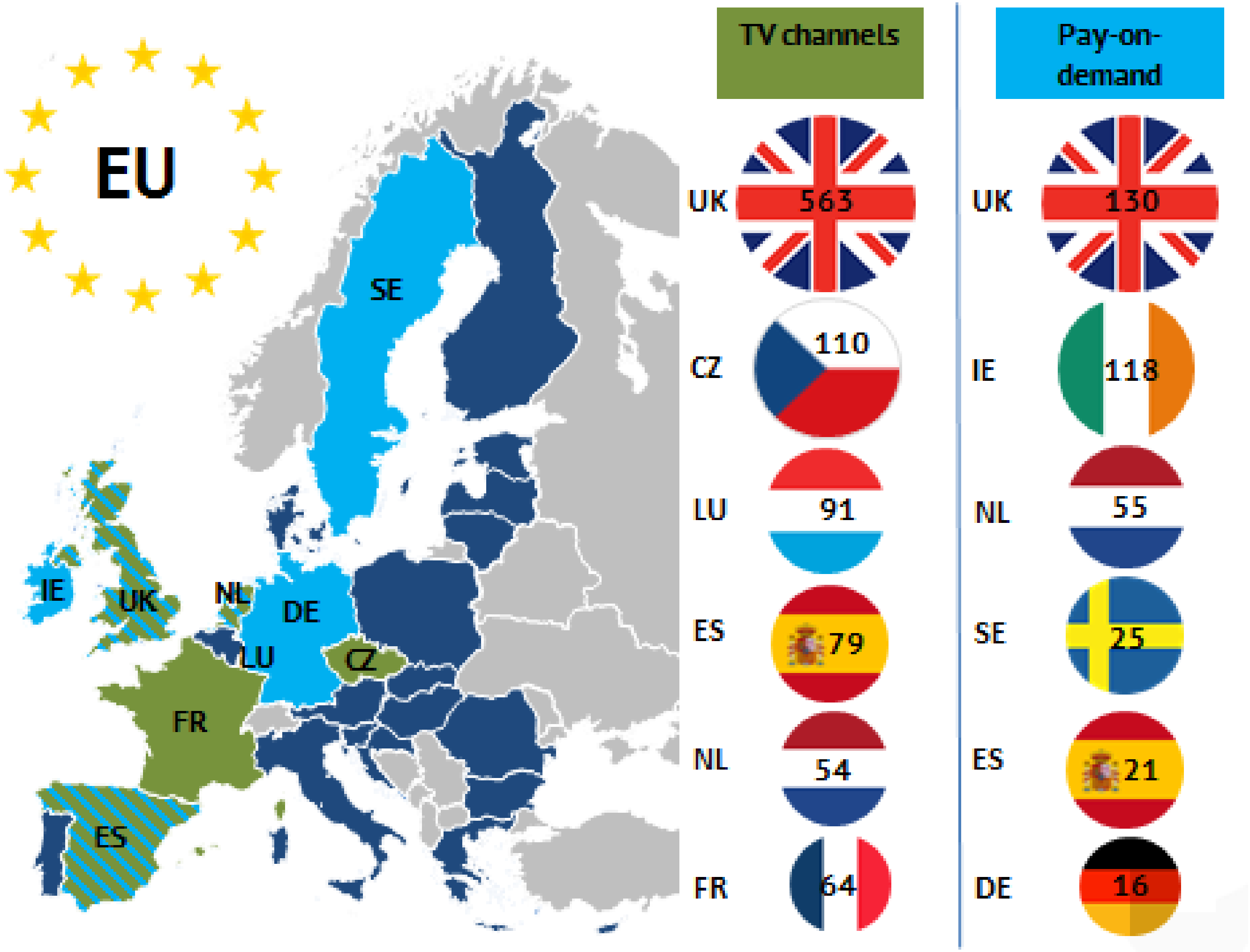
# III. Audiovisual media services targeting other European markets

**Top audiovisual media hubs primarily targeting other European* markets by country | 2018 - In number of services**

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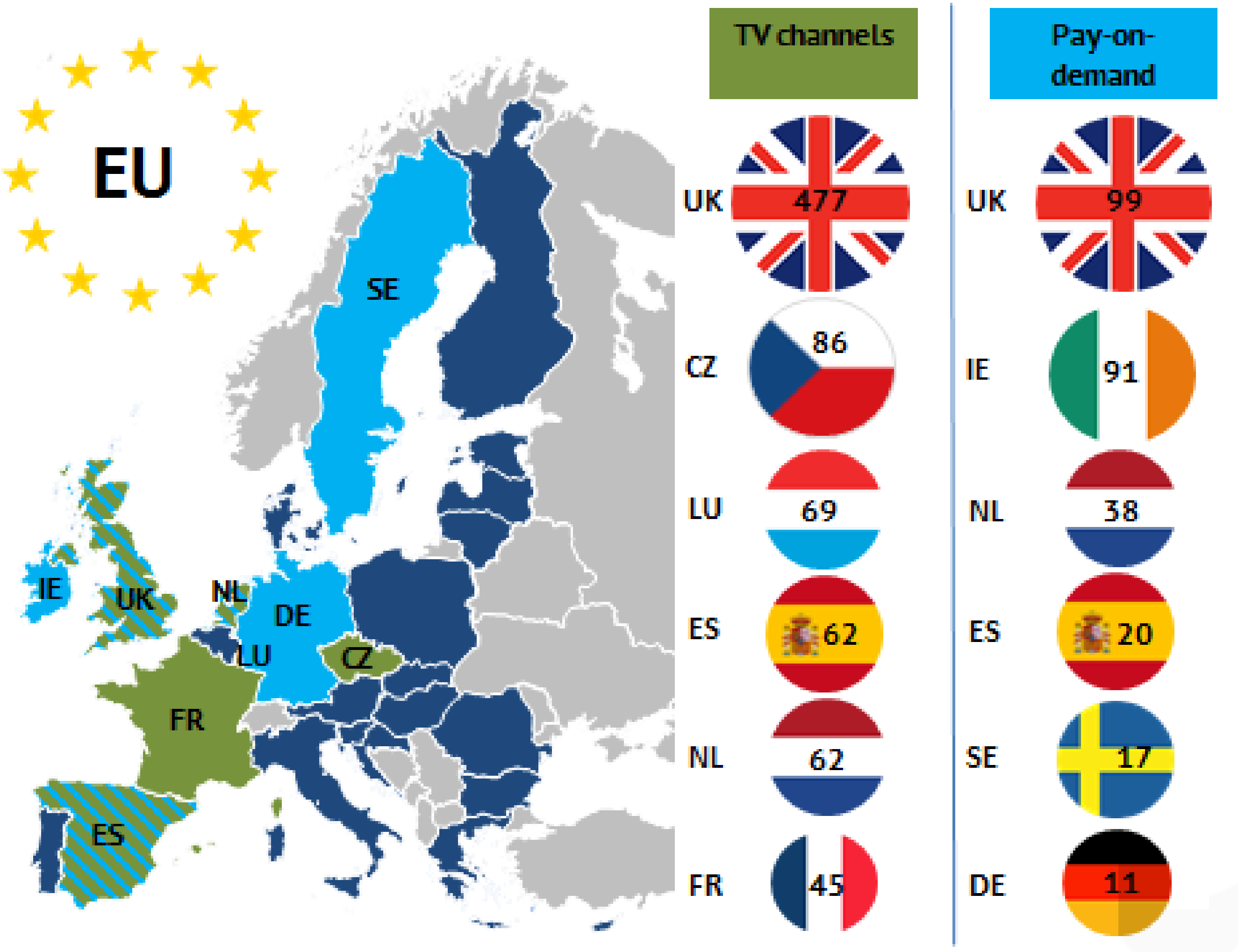
# III. Audiovisual media services targeting EU28 markets

Top audiovisual media hubs primarily targeting other EU28 markets by country | 2018 - In number of services

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# More information:

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agnes.schneeberger@coe.int