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EUROPEAN AUDIOVISUAL OBSERVATORY
EUROPÄISCHE AUDIOVISUELLE INFORMATIONSSTELLE

MAVISE EXTRA: Linear and on-demand audiovisual media services in Europe 2015

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Agnes Schneeberger and Gilles Fontaine

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Director of publication:

Susanne Nikoltchev, Executive Director, European Audiovisual Observatory

Editorial supervision:

Gilles Fontaine, Head of Department for Information on Markets and Financing, European Audiovisual Observatory

Authors:

Agnes Schneeberger, Analyst, Department for Information on Markets and Financing, European Audiovisual Observatory

Gilles Fontaine, Head of Department for Information on Markets and Financing, European Audiovisual Observatory

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Introduction

The digitisation and convergence of interactive platforms has transformed the European audiovisual media landscape in an unprecedented way. These changes have resulted in a dramatic increase in the number of and access to television channels as well as on-demand audiovisual media services in recent years.

The following report maps the supply and circulation of linear and on-demand audiovisual media services in Europe and summarises major pan-European trends. It gives answers to the questions of how many services are established in a country, what genre types and categories they cover, what share of national and foreign services are accessible to consumers and which services specifically target national markets from abroad.

The purpose of this report is to provide an overall background of the linear and on-demand media services landscape in Europe by focusing on a) the country of origin of services b) the availability of services and c) those services targeting other countries. Local TV channels and windows are not included in the analysis.

Chapter overview

- **Chapter 1** examines the television channels that are established in Europe;
- **Chapter 2** looks at the circulation of television channels;
- **Chapter 3** analyses television channels established in the EU that target other markets;
- **Chapter 4** provides an overview of on-demand audiovisual services established in the EU;
- **Chapter 5** explores the supply of on-demand audiovisual services available in the EU;
- **Chapter 6** looks at the circulation of video-on-demand (VOD) services in the EU;
- **Chapter 7** focuses on the US on-demand audiovisual media services available in the EU;
- **The annexes** include a methodological overview and detailed statistics on a country by country basis regarding a) TV channels established in a country by genre and b) VOD services available in a country by country of establishment.

Key Trends

Linear audiovisual media services

- The number of TV channels established in Europe has increased notably since 2009, but more than half of the growth can be attributed to the launch of HD channels, generally simulcasts of existing channels.
- The combined totals of TV channels established in the UK, France and Germany, accounted for 46% of all TV channels licensed in the EU in 2015 and the top ten countries accounted for 76% of the same figure; the same concentration can be found in the figures for on-demand audiovisual services which are virtually identical.
- Almost two thirds of all TV channels established in the EU in 2015 were divided between six major genres: HD (22%), entertainment/TV fiction/games (13%), sport (11%), film (7%), culture/education/documentary (6%) and music channels (6%).
- The growth in channels that are available in a country is both driven by more national channels and greater access to foreign channels.
- The majority of TV channels available on average in a given country were foreign channels and this share remained stable over time.
- In half of the 28 EU countries people were able to watch over 400 television channels.
- Among the foreign channels available in a national market, a rapidly increasing share was specifically targeting this country.
- There are a number of “hubs” of pan-European brand channels by large broadcasting corporations that serve other European markets, many of which are of American origin. The countries where these “hubs” for linear and on-demand audiovisual media services are located are virtually identical (e.g. UK, Czech Republic, Luxembourg, Sweden, and the Netherlands).

On-demand audiovisual media services

- A total of 2563 on-demand audiovisual services were established in the European Union by the end of 2015. Video-on-demand services and catch-up television services taken together represented 73% of the total number of services.
- The United Kingdom, France and Germany accounted for 47% of on-demand audiovisual media services established in the EU 28 by the end of 2015, and the top ten countries accounted for 77% of the same figure.
- By the end of 2015, a typical EU 28 consumer could access an average of 127 on-demand audiovisual media services, with strong variations between countries: 22 services were available in Croatia whereas close to 490 services were accessible in France.
- Video-on-demand (VOD) services (47%) and catch-up television services (25%) accounted for a combined 72% of the on-demand audiovisual media services available on average in the European Union countries.
- On average, 22% of all VOD services available in a given country were established in another EU country. The share of services established in another EU country ranged from 5% in the United Kingdom to 58% in Hungary.
- A series of "hubs" are emerging in Europe, from where VOD services serve several countries. As is the case for linear television, the United Kingdom is the major "hub" for VOD services. In addition, some smaller countries also account for a significant share of the VOD services targeting other EU countries, such as the Czech Republic (HBO), Luxembourg (iTunes), Sweden (Viaplay, SF Anytime, CMore targeting DK and FI) and the Netherlands (Netflix).
- Approximately 50 pay-VOD services originating from the USA were available in Europe in October 2015. These include multiple versions of Google Play and Microsoft Store, two services whose country of establishment is unclear. The rest are niche transactional or subscription services. Hence, US players established in Europe are likely to have a significantly higher market share than US players operating from the USA.

Linear audiovisual media services

The following section provides an overall background of the linear audiovisual media services landscape in

- 38 countries covered by the European Audiovisual Observatory in 2015 and 2009 and
- the 28 EU member states in 2009 and 2015

by focusing on a) the country of origin of services, b) the availability of services in national markets and c) services that target other national markets.

1. Overview of linear audiovisual media services established in Europe

The scope and scale of audiovisual media services established in Europe depend on a number of factors. On the one side they tend to be influenced by the size and wealth of a country and on the other side by factors such as spectrum allocation, ownership structures and funding schemes. The first and latter are managed by governments and as a result, different national policy decisions have created a diverse set of distinct national broadcasting systems. These unique features have also influenced the economic characteristics of the broadcasting markets all of which play part in explaining the sometimes significant differences that occur between European countries and their national television landscapes.

The following Chapter provides an overview of television channels established in Europe. It focuses on the major pan-European trends by providing a census of the total number of television channels established in a country and an analysis of the different genres of these services.

Television channels established in Europe

The number of TV channels established in Europe varies widely from one country to another. Among the countries covered by the European Audiovisual Observatory, the UK took the lead with 1556 TV channels licensed in the country by the end of 2015. It is by far the country with the highest number of linear audiovisual services established in a single national territory. Two thirds of these channels, however, are targeting foreign markets (see Chapter 3). Another country with a large number of licensed TV channels is Russia, a country with a population of 142 million in 2015[1] and hence a large national market in itself. By contrast, countries such as Ireland, the “Former Yugoslav Republic of Macedonia, Lithuania, Estonia, Montenegro and Armenia have less than 30 TV channels established in their respective territories. The reasons as to why there are certain TV hubs in Europe can be found in the market size, different economic conditions and individual licensing regimes that characterise the European landscape for audiovisual media services.

The following summarises the main trends regarding linear audiovisual services established in Europe.

Pan-European trends

- 46% more TV channels established in the EU in 2015 than seven years earlier: The total number of channels established in the EU[2] grew from 3615 in 2009 to 5274 in 2015. This represented a total net gain of 1659 TV channels in seven years.

[1] Estimation from July 2015 according to the World Factbook https://www.cia.gov/library/publications/the-world-factbook/geos/rs.html

[2] Excluding local channels and windows.

- Nearly half of all TV channels established in the EU were concentrated in three countries: The combined totals of TV channels established in the UK (N=1556), France (N=489), and Germany (N=398), accounted for 46% of all TV channels licensed in the EU in 2015; the top ten countries accounted for 76% of the same figure.

- Growth in the total number of TV channels is the norm in EU countries: Well over 90% of EU countries had more channels licensed in their territories in 2015 than seven years ago. The few exceptions to this rule were Sweden and Italy whose number of channels slightly decreased due to the migration of licenses in the first and the closure of various time-shifted and entertainment channels in the latter case.

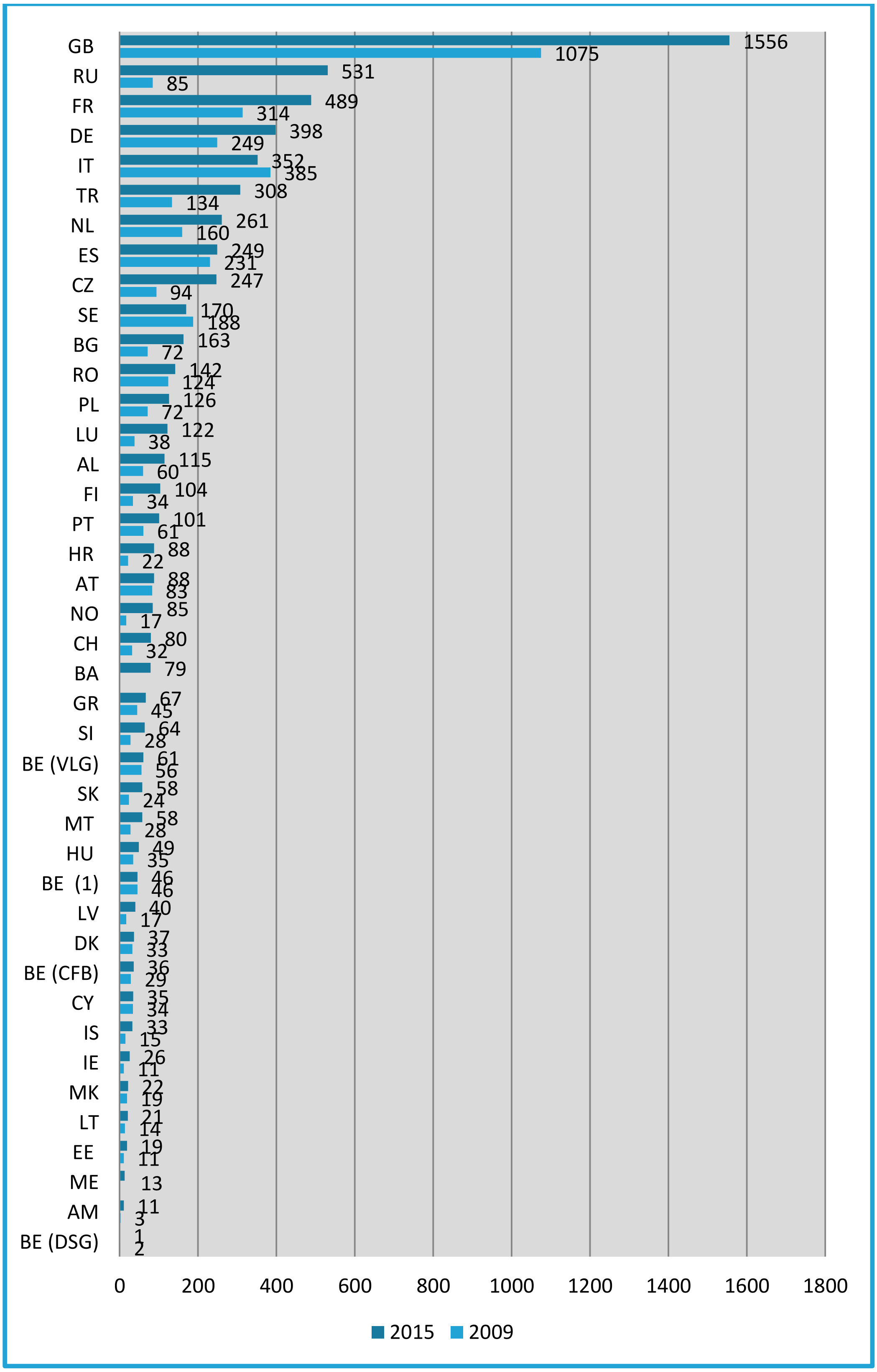
- Two thirds of the channel increase was shared among five EU countries: Three major EU economies including the UK (+481), France (+175) and Germany (+149) as well as the Czech Republic (+153) and the Netherlands (+101) were among the countries that registered the highest net increase of licensed channels in their respective territories in the period from 2009 to 2015. Their cumulated net increase of TV channels represented 64% of the total net increase of services in the EU.

Methodological note

Please note that the 2009 data for the following countries are estimates only: Albania, Armenia, Switzerland, Iceland, “The former Yugoslav Republic of Macedonia”, Norway, Russia and Turkey. There are no 2009 data available for the countries Bosnia and Herzegovina and Montenegro and no data for Morocco. Hence, comparative statistics are focused on the EU28. The figures exclude local channels and windows.

The figure and table overleaf summarise the number of channels established in 38 European countries in the years 2009 and 2015.

Figure 1: Number of TV channels by country of establishment in EUR38 (2009, 2015)



Source: European Audiovisual Observatory / MAVISE database; (1) Includes the 46 language versions of Europe by Satellite (EbS)

Table 1 : Number of TV channels established in EUR38 (2009, 2015)

Country	TOTAL 2009	TOTAL 2015	2015 vs. 2009
EU28			
AT	83	88	6%
BE (CFB)	29	36	24%
BE (DSG)	2	1	-50%
BE (VLG)	56	61	9%
BE [(1)]	46	46	0%
BG	72	163	126%
CY	34	35	3%
CZ	94	247	163%
DE	249	398	60%
DK	33	37	12%
EE	11	19	73%
ES	231	249	8%
FI	34	104	206%
FR	314	489	56%
GB	1075	1556	45%
GR	45	67	49%
HR	22	88	300%
HU	35	49	40%
IE	11	26	136%
IT	385	352	-9%
LT	14	21	50%
LU	38	122	221%
LV	17	40	135%
MT	28	58	107%
NL	160	261	63%
PL	72	126	75%
PT	61	101	66%
RO	124	142	15%
SE	188	170	-10%
SI	28	64	129%
SK	24	58	142%
Total	**3615**	**5274**	**46%**
[1] Includes the 46 language versions of Europe by Satellite (EbS), the TV information service of the EU			
Other countries[2]			
AL	60	115	92%
AM	3	11	267%
BA	0	79	N/A
CH	32	80	150%
IS	15	33	120%
ME	0	13	N/A
MK	19	22	16%
NO	17	85	400%
RU	85	531	525%
TR	134	308	130%
Total	**365**	**1277**	
[2] Countries covered by the European Audiovisual Observatory; no data for LI, MA			

Source: European Audiovisual Observatory / MAVISE database

Genre analysis of television channels established in Europe

Digital television has led to a remarkable increase in the number of television channels in Europe. With the increasing fragmentation of audiences the spectrum of genres in the television landscape has been expanded considerably. The typical generalist channel covering news and information as well as entertainment content has been joined by an array of niche channels that cater for all sorts of specialist interests ranging from sports, film, music and entertainment, to lifestyle, children, news and documentary channels. Some of these genres are particularly popular, accounting for a significant share of channel launches in Europe.

The following sub-section provides an overview of the statistics and main trends of television channels established in Europe with regard to their genre type.

Pan-European trends

- HD channels were the main driver of channel growth in the EU: They accounted for 60% (N=1001) of the net increase of channels (N=1659) in the period from 2009 to 2015. Other genres with significant net channel growth in the same time period were sport (12% of the total net increase) and entertainment/TV fiction/games (11% of the total net increase).

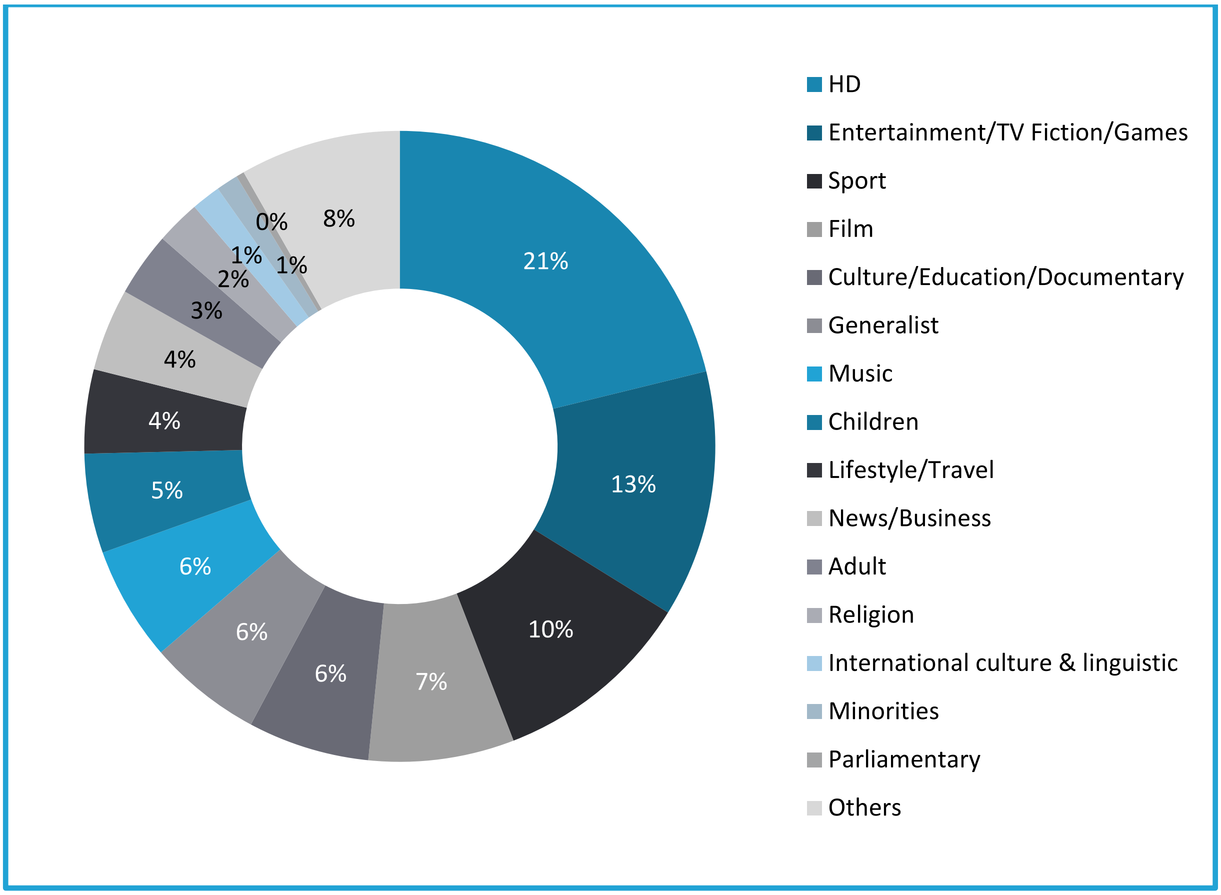
- Almost two thirds of all TV channels established in the EU in 2015 were divided between six genres: The top six genres of channels established in the EU in 2015 included HD (22%), entertainment/TV fiction/games (13%), sport (11%), film (7%), culture/education/ documentary (6%) and music channels (6%). The aggregated total of those top six genres was the equivalent of 65% of all television channels established in the 28 EU member states. Similar results were yielded for the EUR38 countries.

Methodological note

Please note that no consistent genre data is available for all EUR38 countries for 2009. Hence the comparative analysis focuses on the EU28 member states. The figures presented here exclude local channels and windows. Please note that the genre HD includes channels that only exist in HD as well as HD simulcasts of channels in standard definition (SD). Hence, the great majority of channels summarised in the genre HD have in reality a different type of sub-genre.

The following figure provides an overview of linear television channels established in 38 European countries by genre in 2015 (N=6551).

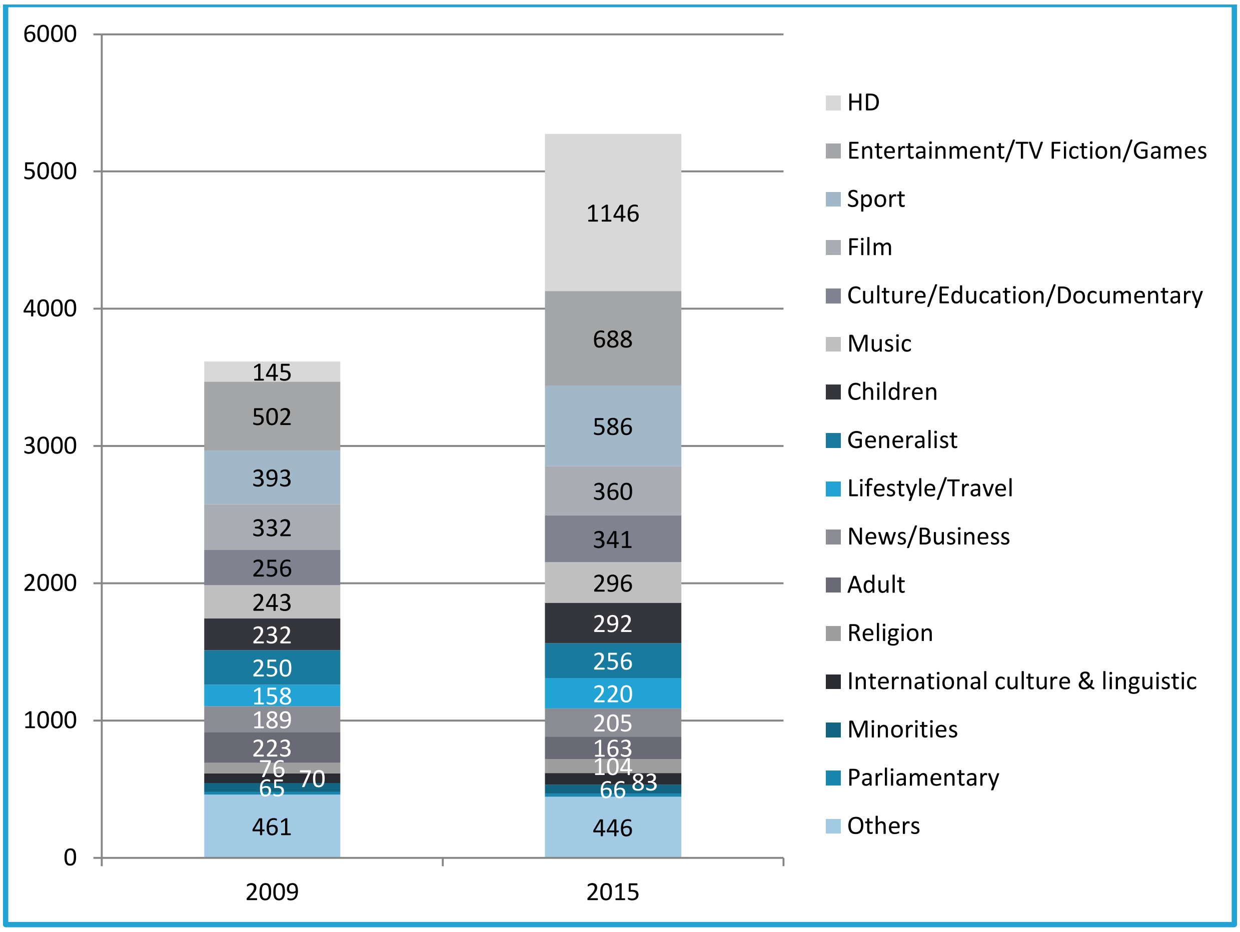
Figure 2: Breakdown of linear audiovisual media services established in EUR38 by genre (2015)



Source: European Audiovisual Observatory / MAVISE database

The figures below provide a comparative overview of the share and total numbers of television channels established in the 28 EU member states by genre in 2009 and 2015.

Figure 3: Breakdown of linear audiovisual media services established in the EU28 by genre (2009, 2015)



Source: European Audiovisual Observatory / MAVISE database

The following table provides an overview of the total number of channels established in the EU in 2009 and compares them to figures from 2015. In addition, the table summarises the net increase by genre category and percent point difference between 2015 and 2009.

Table 2: Number of linear audiovisual media services established in the EU28 by genre and by country (2009, 2015)

Genre	TOTAL 2009	TOTAL 2015	Net increase	2015 vs. 2009
Adult	223	163	-60	-27%
Children	232	292	60	26%
Culture/Education/Documentary	256	341	85	33%
Entertainment/TV Fiction/Games	502	688	186	37%
Film	332	360	28	8%
Generalist	250	256	6	2%
HD	145	1146	1001	690%
International culture & linguistic	70	83	13	19%
Lifestyle/Travel	158	220	62	39%
Minorities	65	66	1	2%
Music	243	296	53	22%
News/Business	189	205	16	8%
Parliamentary	20	22	2	10%
Religion	76	104	28	37%
Sport	393	586	193	49%
Others*	461	446	-15	-3%
Total (no local no windows)	**3615**	**5274**	**1659**	**46%**

*includes TV channels with unidentified genre, promotional, home shopping, time-shifted, weather, dating and 3D channels

Source: European Audiovisual Observatory / MAVISE database;

2. Trends in the circulation of TV channels available in Europe

The scope and scale of the circulation of audiovisual media services in Europe has largely been facilitated by the digitisation and convergence of interactive platforms. The transition to digital television since the early 1990s has led to a spectacular increase in the number of television channels available, reducing operating costs and facilitating access to interactive services through the convergence of previously separated communications networks and services.

Digital satellite television for example, which was first introduced in France in March 1996, offers up to 500 extra channels and so does digital cable which was launched in Europe shortly after. The near completion of the digitisation of terrestrial television in Europe and the continuing launch of various IPTV services is further adding to the rise of the circulation of TV channels on all major distribution platforms.

The following sub-section provides an overview of the supply of television channels that are available in Europe and summarises the key trends. In addition, it includes an analysis of foreign channels that specifically target a country.

Mapping the circulation of TV channels available in Europe

Pan-European trends

The following summarises the most important findings:

- The majority of TV channels available on average in a given country are foreign channels: In the years 2009 and 2015, the share of foreign channels available was 50% and higher in 24 EU countries[3]; in four countries (DE, ES, IT, GB) the share of foreign channels was below the 50% threshold ranging from just 9% in the United Kingdom to 41% in Germany in 2015. All four countries are counted among the major EU television markets with a significant number of channels licensed under their respective national licensing regimes.

- The share of foreign channels remained stable between 2009 and 2015: The share of foreign channels available per country remained relatively stable in the great majority of the 28 EU members (21 countries with a variation of less than +/- 10 percent point difference). Countries that registered further increases included Slovenia (+16), Slovakia (+12), Austria (+11) and Croatia (+10). The two countries that had a slightly lower share of foreign channels were Finland (-17), the Czech Republic (-16) and Greece (-13).

- The growth in the average number of channels available in the majority of EU countries is driven half by the growth of national channels and half by the growth of foreign channels: In 12 EU countries and the three Communities of Belgium the growth of channels available in a country is mainly driven by foreign channels (i.e. net growth ≥50 channels). In 10 EU countries the growth is largely driven by an increase of national channels (i.e. net growth ≥50 channels).

[3] Separate figures available for the Flemish, French and German-speaking Communities of Belgium.

- The number of television channels available varied greatly from one country of the EU to another: In 2015, France had over 700 linear audiovisual services available in the country via the major national distribution platforms (e.g. DTT, cable, satellite, IPTV) whereas people in Malta, Cyprus and Greece could watch between 160 and 200 TV channels. Other countries with a significantly high number of television channels available in their respective territories were Germany (N=622) and the United Kingdom (N=575).
- In half of the EU countries people were able to watch over 400 television channels: In 13 EU countries as well as the three Communities of Belgium people were able to watch between ca. 400 and up to over 700 television channels in 2015.

Methodological note

Foreign channels are those that do not hold a license from the national regulatory authority of a given country. Figures do not include local channels and windows. Please note that there is no 2009 data available for non-EU countries (except Turkey). Hence, the comparative analysis is focused on the 28 EU member states.

The table overleaf provides a general overview of the total number of television channels available by country in 2009 and 2015, showing the percent point difference between these years and summarising the total number and share of foreign channels available by country.

Table 3 : Number of linear audiovisual media services available by country and share of foreign channels (2009, 2015)

Country	2009			2015			2015 vs. 2009
	Total[1]	Foreign	% Share of foreign channels	Total[1]	Foreign	% Share of foreign channels	Change in % share foreign channels
EU28							
AT	290	212	73%	514	432	84%	11
BE (CFB)	310	281	91%	463	427	92%	1
BE (DSG)	335	333	99%	439	438	100%	1
BE (VLG)	461	405	88%	558	497	89%	1
BG	225	152	68%	413	282	68%	0
CY	159	134	84%	198	172	87%	3
CZ	247	200	81%	356	233	65%	-16
DE	462	218	47%	622	252	41%	-6
DK	231	201	87%	275	238	87%	0
EE	251	240	96%	408	391	96%	0
ES	356	100	28%	329	115	35%	7
FI	218	184	84%	312	209	67%	-17
FR	532	325	61%	777	438	56%	-5
GB	660	56	8%	575	49	9%	1
GR	140	105	75%	160	99	62%	-13
HR	143	100	70%	402	320	80%	10
HU	217	181	83%	268	221	82%	-1
IE	551	542	98%	470	444	94%	-4
IT	469	101	22%	441	109	25%	3
LT	239	225	94%	374	353	94%	0
LU	258	248	96%	491	463	94%	-2
LV	172	159	92%	349	313	90%	-2
MT	123	95	77%	200	142	71%	-6
NL	377	276	73%	493	323	66%	-7
PL	281	210	75%	537	417	78%	3
PT	242	193	80%	305	219	72%	-8
RO	219	120	55%	294	178	61%	6
SE	273	179	66%	259	174	67%	1
SI	173	121	70%	444	380	86%	16
SK	241	161	67%	273	215	79%	12
							Other countries[2]
AL[1]	N/A	N/A	N/A	130	16	12%	N/A
AM[1]	N/A	N/A	N/A	21	10	48%	N/A
BA[1]	N/A	N/A	N/A	278	244	88%	N/A
CH[1]	N/A	N/A	N/A	187	139	74%	N/A
IS[1]	N/A	N/A	N/A	46	13	28%	N/A
NO	N/A	N/A	N/A	192	123	64%	N/A
ME[1]	N/A	N/A	N/A	280	267	95%	N/A
MK[1]	N/A	N/A	N/A	307	285	93%	N/A
RU	N/A	N/A	N/A	585	65	11%	N/A
TR	206	77	37%	432	129	30%	-7

[1] Estimates; [2] Countries covered by the European Audiovisual Observatory; no data for LI, MA

Source: European Audiovisual Observatory / MAVISE database

Foreign channels targeting European countries

Following an analysis of the share of foreign channels that are available in a country, this section focuses on a subset of these foreign channels that specifically target a country.

In recent years there has been a steady increase in the number of foreign channels that specifically target various national markets. This usually includes the numerous language versions of brand channels that are established in one country and which broadcast to various other national markets. The majority of these channels are sports, entertainment, film, documentary and children's channels.

Pan-European trends

The following provides an overview of those countries with a high number of foreign channels targeting their territories and some key trends.

- The number of foreign channels targeting a country varies widely between European countries: In 2015, Austria had 152 foreign television channels targeting its territory whereas Malta had only four linear services targeting the country and the German-speaking Community of Belgium had none. Among the non-EU countries Norway had a total of 86 TV channels targeting its national market whereas Albania had just three.
- Austria, Poland, Italy and Hungary were the countries with the highest number of foreign channels targeting their territories: These four countries each had over 100 foreign channels targeting their national markets in 2015; Austria (N=152), Poland (N=140), Italy (N=109), Hungary (N=107).
- Approximately two thirds of EU countries have each been targeted by more than 50 foreign channels: A total of 19 out of 38 European countries (i.e. 17 EU member states + NO, ME) each had 50+ channels targeting their territories; seven European countries (EU: IE, ES, CY, GR; other European: TR, RU, MK) had between 20 and 46 channels and another set of countries (EU: EE, LT, LV, GB; other European: CH) between five and 15 foreign channels targeting their territories.
- In one third of EU countries the increase in the number of foreign channels that target their territories was greater than 100% after seven years since 2009: Nine EU countries (AT, SK, IE, HR, IT, SI, GR, BG, MT) and three other European countries (AL, RU, NO) each had an increase of foreign channels of 100% and more in the time period from 2009 to 2015; the majority of EU members (i.e. 16 countries) had significant increases in the number of foreign channels targeting them ranging from 13% to 97%; Switzerland and the UK had fewer channels targeting their territories in 2015 than in 2009.

Methodological note

The indicator used in the MAVISE database to signify that a foreign channel is specifically targeting another country is when the service broadcasts in the national language of the country (e.g. subtitling and dubbing). In the case of Austria, for example, the identification of foreign channels targeting the country is not as clear-cut. The selection of channels includes the majority of foreign German-language channels available in the country but excludes Sky channels that cover the German and Austrian markets by default. Please note that the data below does not include local channels or windows.

The table below provides an overview of the number of foreign channels that target European countries.

Table 4 : Number of foreign TV channels targeting European countries (2009, 2015)

Country	2009			2015			Total 2015 vs. 2009
	Public	Private	Total	Public	Private	Total	
EU28							
AT[1]	0	5	5	4	248	152	2940%
BE	0	4	4	0	5	5	25%
BE (CFB)	0	4	4	0	5	5	25%
BE (DSG)	0	0	0	0	0	0	N/A
BE (VLG)	0	0	0	0	5	5	N/A
BG	0	25	25	2	49	51	104%
CY[2]	1	7	8	2	28	30	N/A
CZ	0	30	30	2	53	55	83%
DE	2	73	75	2	90	92	23%
DK	2	47	49	2	88	90	84%
EE	2	12	14	2	13	15	7%
ES	3	29	32	5	31	36	13%
FI	0	29	29	2	55	57	97%
FR	2	43	45	2	60	62	38%
GB	3	15	18	3	8	11	-39%
GR	2	11	13	2	28	30	131%
HR	0	9	9	2	58	60	567%
HU	2	53	55	2	105	107	95%
IE	2	3	5	6	40	46	820%
IT	3	21	24	50	59	109	354%
LT	2	6	8	2	10	12	50%
LU	0	0	0	0	5	5	N/A
LV	2	8	10	2	10	12	20%
MT	2	0	2	2	2	4	100%
NL	2	34	36	8	60	68	89%
PL	2	69	71	7	133	140	97%
PT	1	37	38	3	55	58	53%
RO	2	40	42	2	56	58	38%
SE	2	39	41	3	62	65	59%
SI	0	17	17	2	57	59	247%
SK	2	2	4	2	53	55	1275%
[1] Including majority of German-language channels available in the country; [2] Data not comparable: 2009 data for the Turkish Cypriot Community and 2015 data for the Republic of Cyprus							
Other countries[3]							
AL	0	1	1	0	3	3	200%
AM	N/A	N/A	N/A	N/A	N/A	N/A	N/A
BA	N/A	N/A	N/A	0	7	7	N/A
CH	1	39	40	2	10	12	-70%
IS	0	0	0	0	0	0	N/A
ME	N/A	N/A	N/A	0	55	55	N/A
MK	N/A	N/A	N/A	0	20	20	N/A
NO	0	37	37	0	86	86	132%
RU	0	14	14	0	33	33	136%
TR	N/A	N/A	N/A	1	39	40	N/A
[3] Countries covered by the European Audiovisual Observatory; no data for LI, MA							

Source: European Audiovisual Observatory / MAVISE database

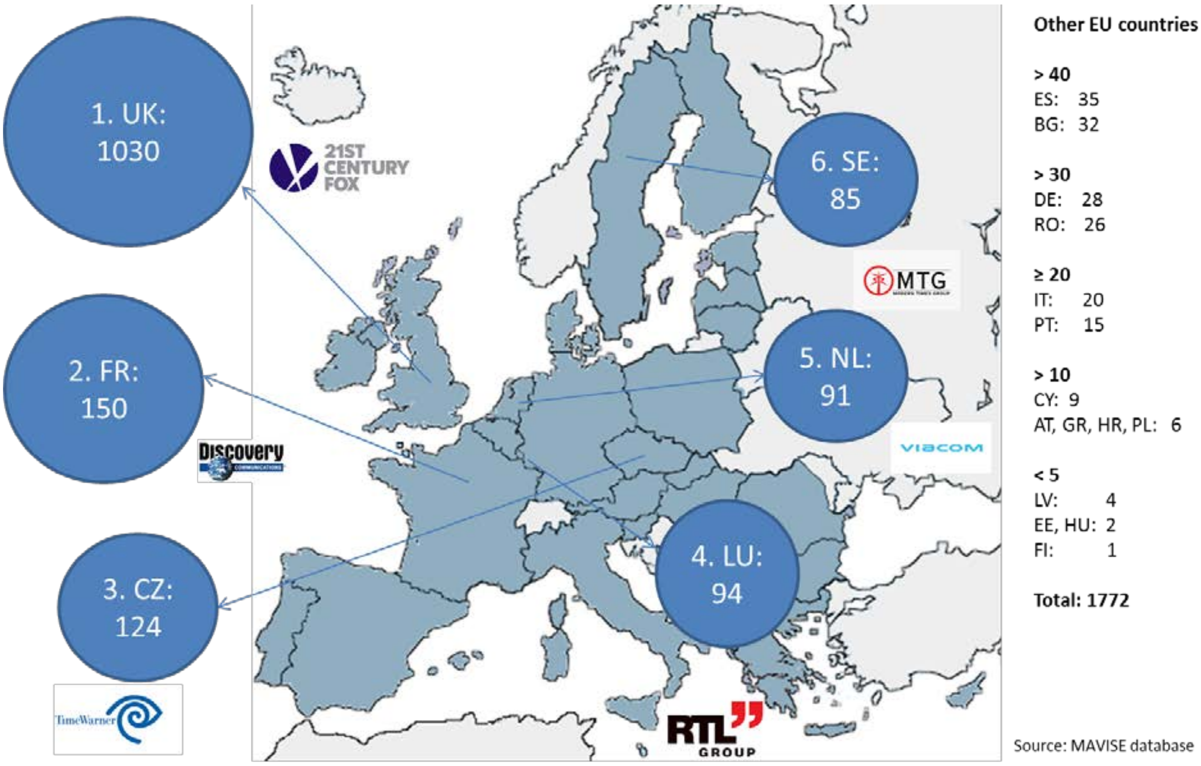
3. TV channels established in the EU that target other countries

The origin of TV channels is not necessarily based in the respective countries where they are consumed. Greater access to foreign channels has changed national TV markets and paved the way for an increasing number of services that specifically target a country.

There are a number of important centres or “hubs” for the establishment of television channels in the EU that target other countries. The most important ones comprise the UK, France, the Czech Republic, Luxembourg, the Netherlands and Sweden. The factors that facilitate such hubs include economic as well as regulatory aspects. Different national tax regimes in the EU create individual business environments that can be more attractive than in other countries, low levels of legal obligations imposed on operators and different licensing regimes may all play a role in the creation of pan-European centres of audiovisual services in EU member states.

The chart below maps the number of TV channels established in the EU that targeted other markets in 2015.

Figure 4: Number of TV channels established in the EU targeting other countries (2015)



Source: European Audiovisual Observatory / MAVISE database

Pan-European trends

The following summarises some general trends and important characteristics of the top six countries with the highest number of channels that targeted other countries in the year 2015:

- There is a notable development of hubs of pan-European brand channels by large broadcasting corporations, many of which are of American origin.
- Among the number of foreign channels available in a country, a rapidly increasing share is specifically targeting national markets.
- In four out of six of the top-six hubs of pan-European brand channels the number of established channels targeting other markets is greater than the number of channels for the national markets (i.e. CZ, GB, LU, SE).
- Two thirds of TV channels established in the UK target other countries: not only did the UK have by far the highest number of channels established among EU member states (N=1030); a total of 66% were broadcasting to a large number of countries in Europe and beyond in 2015. The majority of broadcasting companies that license their channels in the UK for distribution in Europe are of American origin.
- Around 1/3 of channels established in France are targeting territories abroad: Among the EU countries France had the second highest number of channels (N=150) established in the country that target other countries in the EU, Turkey and beyond.
- Half of the channels established in the Czech Republic target other markets, mainly in Central and South Eastern Europe: In a pan-European comparison, the Czech Republic holds the 3rd place of countries with the highest number of channels that target other markets (N=124).
- Almost 2/5 of all channels established in Luxembourg target other territories: In addition to the UK, Luxembourg is another country where a greater number of channels that is established in the country targets foreign territories than its own national market (i.e. 77%).
- Over 1/3 of channels established in the Netherlands are targeting other national markets: A total of 91 channels that are established in the Netherlands are targeting other countries and most of these were adult channels.
- Half of the channels established in Sweden are aimed at Nordic and Baltic states: Sweden comes in fifth place with regard to the total number of television channels that target other countries (N=85).
- There are four other EU countries with more than 25 television channels targeting other territories: Spain (35 channels most of which are targeting Portugal), Bulgaria (32 channels targeting Central and South Eastern Europe), Germany (28 channels, including services targeting Austria and Switzerland) and Romania (26 channels mainly targeting Central and South Eastern Europe) are another group of countries with a significant number of television services under their national licensing regimes that target other markets.

Table 5: Examples of pan-European brand channels that target other markets by country of establishment and group

Country	Group	Examples of brand channels	Target market
UK			
	21st Century Fox (US)	History Channel, National Geographic, Baby TV	Europe(1)
	AMC Networks (US)	CBS, Extreme Sports, Jimjam	Europe(1)
	Discovery Communications (US)	Animal Planet, Discovery Channel, TLC	Europe(1)
	Modern Times Group (SE)	Viasat Explore, History, Sport, Motor, Nature	Europe(1)
	Scripps Networks (US)	Travel Channel	Europe(1)
	Sony Pictures (US)	AXN Europe, Sony Entertainment	Europe(1)
	SPI International (NL)	Filmbox	Central Europe
	Time Warner (US)	Boomerang, Cartoon Network, TNT	Europe(1)
	Viacom (US)	Nick Jr, Nickelodeon	Europe(1)
	Walt Disney Company (US)	Disney Channel, Disney Junior, Disney XD	Europe(1)
FR			
	Discovery Communications (US)	Eurosport	Europe(1)
	Euronews (FR)	Euronews	Europe(1)
	TV5MONDE (FR)	TV5MONDE	International(2)
CZ			
	Time Warner (US)	Cinemax, HBO	Central and South Eastern Europe
	Viacom (US)	Nickelodeon, VH1, MTV	Central Europe
	Walt Disney Company (US)	Disney Channel, Disney Junior, Disney XD	Central and South Eastern Europe
LU			
	21st Century Fox (US)	SKY Sport Channels	HR, RS, SI
	Bertelsmann (DE)	RTL	BE, HU, NL
	Dogan Group (TR)	EURO D, EURO Star	DE (Turkish Community)
NL			
	Viacom (US)	MTV, Nickelodeon, Comedy Central	DK, NO, PL, SE
	Walt Disney Company (US)	Disney Channel, Disney Junior, Disney XD	BE
	*Various adult channels	Penthouse, etc.	BE, BG, CZ, DE, FR, TR
SE			
	Bonnier Group (SE)	CMORE	DK, FI, NO
	Modern Times Group (SE)	Viasat, TV1000	DK, FI, NO and Baltics

(1) Various European countries; (2) Territories in Europe and overseas

Source: European Audiovisual Observatory / MAVISE database

Methodological note

The indicator used in the MAVISE database to signify that a channel is specifically targeting another national market is when the service broadcasts in the national language of the country (e.g. subtitling and dubbing) or has a target country included in the name (e.g. N24 Austria) or concept.

The following table provides an overview of the number of television channels targeting foreign countries in 2009 and 2015 and the percent point difference between the two years.

Table 6: Number of linear audiovisual media services established in the EU targeting other countries (2009, 2015)

Country	TOTAL 2009	TOTAL 2015	2015 vs. 2009
AT	5	6	20%
BE (CFB)	1	0	-100%
BE (DSG)	0	0	N/A
BE (VLG)	2	0	-100%
BE (1)	46	0	-100%
BG	0	32	N/A
CY	7	9	29%
CZ	47	124	164%
DE	28	28	0%
DK	2	0	-100%
EE	0	2	N/A
ES	22	35	59%
FI	0	1	N/A
FR	88	150	70%
GB	487	1030	111%
GR	10	6	-40%
HR	0	6	N/A
HU	4	2	-50%
IE	1	0	-100%
IT	50	20	-60%
LT	0	0	N/A
LU	30	94	213%
LV	2	4	100%
MT	0	0	N/A
NL	61	91	49%
PL	3	6	100%
PT	9	15	67%
RO	22	26	18%
SE	85	85	0%
SI	0	0	N/A
SK	0	0	N/A
TOTAL EU 28	**1012**	**1772**	**75%**

Source: European Audiovisual Observatory / MAVISE database

On-demand Audiovisual Media Services

The following section provides an overall background of the on-demand audiovisual media services landscape in

- the 28 EU member states in 2013 and 2015

by focusing on a) the country of origin of services, b) the availability of services in national markets and c) services that target other national markets.

4. Overview of on-demand audiovisual media services established in the 28 EU member states

The following Chapter provides an overview of on-demand audiovisual services established in the 28 EU member states. It focuses on the major pan-European trends by providing a census of the total number of services established in a country and an analysis of the different categories of these services.

The table overleaf summarises the number of on-demand audiovisual media services established in the 28 EU member states in 2013 and 2015. A total of 3088 services were established in the European Union by the end of December 2015[4]. It is likely that the number of catch-up television services is further increasing as the majority of broadcasters are launching such services. The number of VOD services, however, is expected to stabilise due to the consolidation of the market.

Methodological note

The comparison between 2013 and 2015 is only indicative as the perimeter of on-demand audiovisual media services tracked in MAVISE has evolved, in particular as regards the local catch-up television services and branded channels on YouTube which are no longer included.

[4] This includes services established in the EU 28 countries that target non-European countries.

Table 7: Number of on-demand audiovisual media services established in the EU 28

Country	TOTAL 2013	TOTAL 2015	2015 vs. 2013
AT	66	118	79%
BE	92	115	25%
BG	22	25	14%
CY	22	22	0%
CZ	96	125	30%
DE	274	330	20%
DK	43	51	19%
EE	11	14	27%
ES	97	109	12%
FI	25	28	12%
FR	412	434	5%
GB	515	682	32%
GR	35	39	11%
HR	14	16	14%
HU	78	90	15%
IE	23	26	13%
IT	96	151	57%
LT	14	15	7%
LU	113	121	7%
LV	19	21	11%
MT	4	8	100%
NL	110	120	9%
PL	107	112	5%
PT	39	40	3%
RO	40	52	30%
SE	144	153	6%
SI	19	20	5%
SK	33	51	55%
TOTAL EU 28	**2563**	**3088**	**20%**

Source: European Audiovisual Observatory / MAVISE database

Concentration of on-demand audiovisual media services

Pan-European trends

- The United Kingdom, France and Germany accounted for 47% of on-demand audiovisual media services established in the EU 28 by the end of December 2015, and the top ten countries accounted for 77% of the same figure.

The following table shows the concentration of on-demand audiovisual media services among the EU 28 countries[5].

Table 8: Concentration of on-demand audiovisual media services established in the EU 28 (2015)

Country	TOTAL on-demand services	Share of total on-demand services	Cumulated
GB	515	20%	20%
FR	412	16%	36%
DE	274	11%	47%
SE	144	6%	52%
LU	113	4%	57%
NL	110	4%	61%
PL	107	4%	65%
ES	97	4%	69%
CZ	96	4%	73%
IT	96	4%	77%
BE	92	4%	80%
HU	78	3%	83%
AT	66	3%	86%
DK	43	2%	88%
RO	40	2%	89%
PT	39	2%	91%
GR	35	1%	92%
SK	33	1%	93%
FI	25	1%	94%
IE	23	1%	95%
BG	22	1%	96%
CY	22	1%	97%
LV	19	1%	98%
SI	19	1%	98%
HR	14	1%	99%
LT	14	1%	99%
EE	11	0%	100%
MT	4	0%	100%
TOTAL			

Source: European Audiovisual Observatory / MAVISE database

[5] Services established in a certain country can target not only other EU 28 countries, but also other European and non-European countries. Apple service iTunes, for instance, manages its operation for a significant number of non-European countries from Luxembourg.

Categories of on-demand audiovisual media services established in a country

Pan-European trends

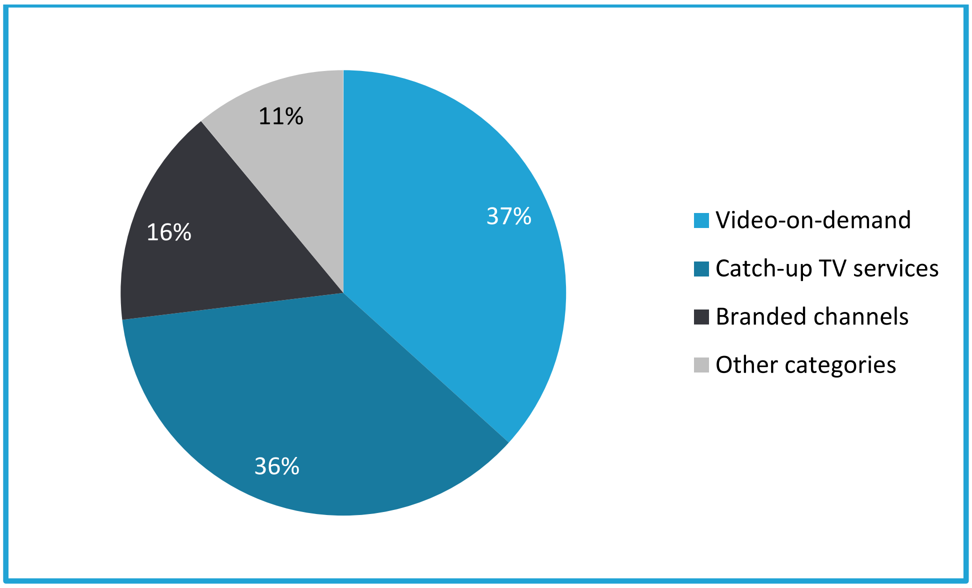
- The vast majority of on-demand audiovisual media services established in the EU were either video-on-demand (VOD) services or catch-up television services. Together, they represented 73% of the total number of services[6]. Variations existed between EU countries: whereas in the EU 28 as a whole the number of (pay) VOD services and of catch-up TV services were equivalent, some countries showed a higher proportion of one category. This could be due to several factors, including the incentive for broadcasters to launch catch-up TV services to compensate for the decrease of linear viewing, the readiness of consumers to pay for these services, and the choice of several players to base their pan-European activities in a given country.

Methodological note

One should also bear in mind that a general lack of comprehensive lists by media regulatory authorities complicates a consistent search and identification of VOD services. Hence, the sometimes notable differences in data records between countries where data is readily provided such as France, Germany and the UK and others where it is more difficult to gather such information in a consistent manner. For a definition of categories of services please see section "Methodological overview".

The following figure and table overleaf provide a breakdown of on-demand audiovisual media services established in the EU 28 by category of services in 2015.

Figure 5: Breakdown of on-demand audiovisual media services established in the EU 28 by category of services (2015)



Source: European Audiovisual Observatory / MAVISE database

[6] As stated before, VOD and catch-up TV services are easier to track than the other categories of services.

Table 9: Breakdown of on-demand audiovisual media services established in the EU 28 by category of service and by country (2015)

Country	VOD	Branded channels on open platforms	Catch up TV services	News / Portals	Film/TV archives	Sport events	Film trailers	Various	TOTAL 2015
AT	13	4	35	10		2		2	**66**
BE	46	10	22	4	1	2	3	4	**92**
BG	10	1	10					1	**22**
CY	15	2	4			1			**22**
CZ	50	4	15	9	1	7	1	9	**96**
DE	92	59	99	6	3	3	8	4	**274**
DK	13	3	16	2			9		**43**
EE	2	2	7						**11**
ES	40	18	27	2	1	4	3	2	**97**
FI	18	1	5		1				**25**
FR	144	104	126	9	2	4	12	11	**412**
GB	195	78	198	10	4	17	2	11	**515**
GR	6	10	17	1			1		**35**
HR	7	2	4					1	**14**
HU	7	5	60	3				3	**78**
IE	8	8	6		1				**23**
IT	21	17	33	12	2	2	3	6	**96**
LT	4	5	5						**14**
LU	85	2	9	17					**113**
LV	2	2	15						**19**
MT	1	1	2						**4**
NL	41	29	32		4	2	2		**110**
PL	38	17	38	2	4	1	1	6	**107**
PT	9	9	21						**39**
RO	10	7	22					1	**40**
SE	45	3	84	4	1	5		2	**144**
SI	12	2	5						**19**
SK	7	3	15	6				2	**33**
Total EU	**941**	**408**	**932**	**97**	**25**	**50**	**45**	**65**	**2563**

Source: European Audiovisual Observatory / MAVISE database

Video-on-demand (VOD) services that target other countries

Pan-European trends

- Figures show that a series of "hubs" are emerging in Europe from where VOD services serve several countries. As is the case for linear television, the United Kingdom is the major "hub" for VOD services. In addition, some smaller countries also account for a significant share of the VOD services targeting other EU countries, such as the Czech Republic (e.g. HBO), Luxembourg (e.g. iTunes), Sweden (e.g. Viaplay, CMore, SF Anytime, CDON) and the Netherlands (e.g. Netflix since 2014).

Methodological note

VOD services are those that grant pay-access to a catalogue of audiovisual works. Hence, the figures below exclude, among others, catch-up TV and branded channels. The figures also include a small number of free video-on-demand services such as Viewster.

The following table provides an analysis of a sub-set of on-demand audiovisual media services and these are video-on-demand (VOD) services established in one EU country but primarily targeting another EU country.

Table 10: Video-on-demand services established in the EU primarily targeting another country (2015)

Country	VOD services targeting primarily another EU country[1]
AT	1
BE	1
BG	0
CY	7
CZ	24
DE	3
DK	0
EE	0
ES	3
FI	0
FR	20
GB	69
GR	0
HR	0
HU	0
IE	2
IT	2
LT	0
LU	29
LV	0
MT	0
NL	13
PL	0
PT	0
RO	3
SE	18
SI	0
SK	0

[1] Excludes adult services

Source: European Audiovisual Observatory / MAVISE database

5. Supply of on-demand audiovisual media services in the 28 EU member states

This section provides a general overview of the total number of on-demand audiovisual media services available by country in 2013 and 2015.

Pan-European trends

- By the end of December 2015, a typical consumer in the EU 28 could access an average of 127 on-demand services, with strong variations between countries: 22 services were available in Croatia whereas close to 490 services were accessible in France.

Methodological note

As noted before, the comparison between 2013 and 2015 is only indicative as the perimeter of on-demand audiovisual media services tracked in MAVISE has evolved, in particular as regards the local catch-up television services and branded channels on YouTube which are no longer included.

The table overleaf illustrates the total number of on-demand audiovisual media services available by country in the 28 EU member states.

Table 11 : Number of on-demand audiovisual media services available by country in the EU 28 (2013, 2015)

Country	TOTAL 2013	TOTAL 2015	2015 vs. 2009
AT	255	189	-26%
BE (CFB)	153	157	3%
BE (DSG)	95	63	-34%
BE (VLG)	147	148	1%
BG	31	30	-3%
CY	53	45	-15%
CZ	104	75	-28%
DE	372	367	-1%
DK	110	104	-5%
EE	36	37	3%
ES	222	207	-7%
FI	131	120	-8%
FR	516	490	-5%
GB	553	394	-29%
GR	82	63	-23%
HR	22	22	0%
HU	124	112	-10%
IE	148	145	-2%
IT	236	178	-25%
LT	34	35	3%
LU	73	68	-7%
LV	47	50	6%
MT	44	34	-23%
NL	161	142	-12%
PL	157	149	-5%
PT	85	84	-1%
RO	62	51	-18%
SE	168	153	-9%
SI	62	56	-10%
SK	70	52	-26%
EU28 Average	**145**	**127**	**-12%**

Source: European Audiovisual Observatory / MAVISE database

Overview of categories of on-demand audiovisual media services available in the EU

Pan-European trends

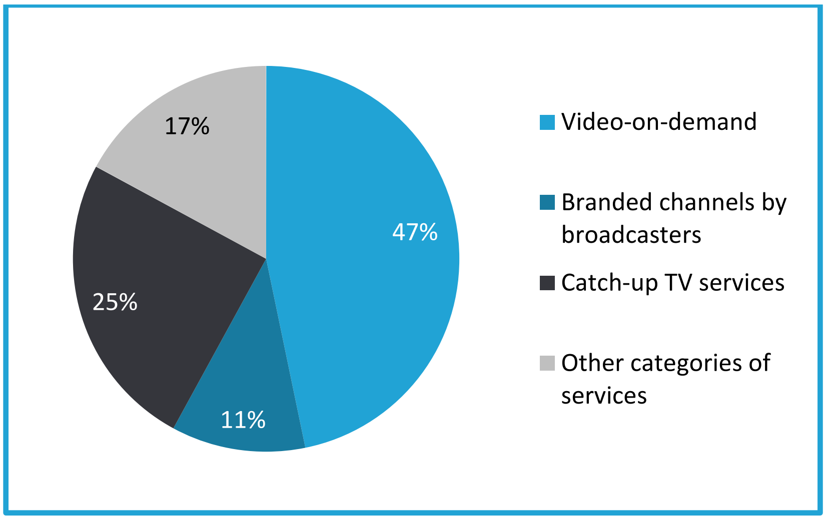
- The most significant categories of services were video-on-demand services (VOD) (i.e. having access to a catalogue of films and television works either through a transactional or a subscription model) and catch-up television services (i.e. the provision of recently broadcast programmes for a limited period of time). Both categories, which are the easiest to track, accounted for 72% of the on-demand services available on average in the European Union.

Methodological note

For the definition of the categories of services, see section “Methodological overview”.

The following figure and table overleaf provide a breakdown of on-demand audiovisual media services available in the EU 28 by category of services and by country.

Figure 6: Average breakdown of on-demand audiovisual media services available in an EU country by category of services (2015)



Source: European Audiovisual Observatory / MAVISE database

Table 12: Breakdown of on-demand audiovisual media services available in the EU 28 by category of service and by country (2015)

Country	VOD	Branded channels of broadcasters	Catch up TV services	News	Portals	Archives	Sport events	Film trailers	Various	TOTAL 2015
AT	7	34	48	11	1	4	4	1	10	189
BE (CFB)	9	6	27	5	1	4	2	4	9	157
BE (DSG)	4	3	7	2		3	2	1	4	63
BE (VLG)	9	9	30	5	1	3	2	2	6	148
BG	1	1	13			1			1	30
CY	3	3	4	1		1	1		2	45
CZ	3	3	15	7	2	2	5	1	9	75
DE	1	56	110	6	2	6	5	9	12	367
DK	5	4	39	2	1	3	1	1	2	104
EE	1	4	16		1	3	1			37
ES	1	27	30	4	1	4	5	4	17	207
FI	8	2	26	1	1	4	2	1	2	120
FR	2	92	112	9	1	5	9	14	25	490
GB	2	45	56	14	1	7	16	3	27	394
GR	2	11	18	2	1	3		1	2	63
HR	1	3	6			1			1	22
HU	2	7	75	3		3			3	112
IE	8	14	22	4		4	4	1	9	145
IT	7	22	40	9	5	5	4	4	13	178
LT	1	7	10		1	3	1			35
LU	4	2	7	4		3	2	3	5	68
LV	1	4	28		1	3	1			50
MT	2	1	2	1		1			2	34
NL	6	32	36	1	1	4	3	3		142
PL	5	21	54	1	1	7	1	1	6	149
PT	4	10	26		1	3			2	84
RO	1	9	26			3			1	51
SE	5	7	77	4		4	4	1	3	153
SI	3	2	9	1		2			3	56
SK	1	3	19	2	4	3	1		2	52
EU28 Average	62	15	33	4	1	3	3	3	7	127

Source: European Audiovisual Observatory / MAVISE database

6. The circulation of video on-demand (VOD) services available in the EU 28

This section provides a general overview of a sub-set of on-demand audiovisual media services available in the EU 28. It includes the total number of video on-demand (VOD) services (i.e. having access to a catalogue of films and television works either through a transactional or a subscription model) available by country in 2013 and 2015.

Pan-European trends

- A significant number of VOD services available in a given EU country are established in another country: on average, by December 2015, 22% of all VOD services available in a given country were established in another EU country. The share of services established in another EU country ranged from 5% in the United Kingdom, to 58% in Hungary.

Methodological note

VOD services are those that grant pay-access to a catalogue of audiovisual works. In addition, a small number of free VOD services such as Viewster are also included in this category of services. Please note that the figures cited below exclude, among others, catch-up TV and branded channels.

The table overleaf present a breakdown of VOD services available by country and by country of establishment in 2015.

Table 13 : Breakdown of video-on-demand services available by country and by country of establishment (2015)[1]

Country	National	Established in another EU country	Established in the US[2]	Established in another country	Total of available VOD services	Share of EU cross-border services
AT	11	25	39	5	80	31%
BE (VLG)	24	25	38	3	90	28%
BE (CFB)	17	37	41	5	100	37%
BE (DSG)	0	38	39	2	79	48%
BG	10	4	1	0	15	27%
CY	8	5	20	2	35	14%
CZ	27	4	1	0	32	13%
DK	14	21	17	2	54	39%
EE	3	6	1	3	13	46%
FI	16	21	44	2	83	25%
FR	114	31	74	9	228	14%
DE	92	24	44	6	166	14%
ES	25	14	59	18	116	12%
GB	114	11	92	10	227	5%
GR	6	6	21	2	35	17%
HR	7	2	0	2	11	18%
HU	8	14	0	2	24	58%
IE	9	20	57	5	91	22%
IT	19	12	43	4	78	15%
LV	3	7	0	3	13	54%
LT	5	7	0	3	15	47%
LU	5	14	21	4	44	32%
MT	1	5	20	2	28	18%
NL	26	15	22	3	66	23%
PL	37	17	1	3	58	29%
PT	11	10	21	2	44	23%
RO	5	5	1	2	13	38%
SE	18	10	24	3	55	18%
SK	7	8	1	2	18	44%
SI	9	8	21	2	40	20%
EU28 Average	**22**	**14**	**25**	**4**	**65**	**22%**

[1] The total number of services available in the EU is not the sum of services available in each country as the same service may be available in multiple countries.
[2] The figures regarding services established in the USA should be considered as indicative: some services used to present the film catalogues of the different US studios as separated offers and were therefore considered as US-based services at that time. This classification no longer applies in several cases. For more details please see Chapter 7 on “Focus on the US services”.

7. Focus on the US on-demand audiovisual media services available in Europe

An analysis of the MAVISE database in October 2015 showed the following:

- A total of 54 pay-VOD services originating from the USA are available in Europe. It is particularly noteworthy to mention that:
  - Most of these services are classified as originating from the USA by default, because no evidence of a declaration to a European regulator could be found, and because the company is operating at least partially from the USA.
  - These companies include major players such as Google Play and Microsoft whose VOD activities seem to be no longer established in Luxembourg.
- These 54 pay-services include multiple linguistic versions of the same service: 8 linguistic versions of Google Play, and 14 linguistic versions of Microsoft Store. Excluding the linguistic versions of all these services brings the count of pay-VOD services originating from the USA and targeting Europe down to 34.
- Apart from Google Play and Microsoft Store, the rest of the pay on-demand services are niche services with limited market power (including adult services) which exist either as stand-alone offers or are available on YouTube as subscription on-demand services for a moderate monthly fee.
- On the pay on-demand services market a number of major US players are based in Europe (e.g. Netflix, iTunes, Amazon). Hence, US players established in Europe are likely to have a significantly higher market share than US players operating from the USA.
- These figures do not include sports services (e.g. access to sport events from US leagues) which the European Audiovisual Observatory does not track systematically.
- A census of US free-services targeting Europe is not possible to establish, as US free-services may be technically available in Europe without aiming to capture European advertising. YouTube, of course, is the great exception to this.

Annexes

1.1 Methodological overview for linear and on-demand audiovisual services

This section provides a methodological overview of how the data in this report was collected, measured and categorised. The scope of data includes 38 European countries covered by the European Audiovisual Observatory. Data for two countries (i.e. Liechtenstein and Morocco) were excluded from the analysis due to a lack of availability.

All data concerning linear and on-demand audiovisual media services established or available in Europe countries quoted in this report are provided by the European Audiovisual Observatory and its database MAVISE. MAVISE is a database on TV and on-demand audiovisual services and companies in Europe for the purpose of providing better knowledge of the audiovisual market and more transparency.

Linear audiovisual media services

Type of channels, time series and data comparison

The data presented in this note covers the years 2009 and 2015. It excludes local channels and windows. Due to the inconsistent availability of data for non-EU countries for the year 2009 the comparative analyses focus on the 28 EU member states.

Linear audiovisual media services established and available in a country

Television channels that are **established in a country** include those that hold a broadcasting license from a national regulatory authority. In addition, other channels are included in the data collection that may not hold a license but are clearly of a specific national origin according to company address, Internet domain name etc.

Television channels that are **available in a country** comprise those that are available on the major distribution platforms (e.g. DTT, cable, satellite, IPTV) as advertised by the channel line-ups on the websites of platform operators.

Foreign channels

Foreign channels are those that do not hold a license from the national regulatory authority of a given country.

Foreign channels targeting a country

Foreign channels that specifically target a country form a sub-category of foreign channels. The indicator used in the MAVISE database to signify that a channel is specifically targeting another national market is when the service broadcasts in the national language of the country (e.g. subtitling and dubbing) or has a target country included in the name (e.g. N24 Austria) or concept.

Cautionary note on the use of figures for television channels

When using the figures for linear audiovisual services, the following should be taken into account:

- The data for non-EU countries is largely inconsistent. This has to do with the fact that various members of the European Audiovisual Observatory joined gradually and hence data collection commenced at different points in time. In addition, the initial main focus of the MAVISE database was to cover the EU member states and therefore the data for these countries is more consistent.
- In most cases data for non-EU countries for the year 2009 are estimates (see above).
- Please note that the genre HD includes channels that only exist in HD as well as HD simulcasts of channels in standard definition (SD). Hence, the great majority of channels in the genre HD have in reality a different genre. The rationale for including HD simulcasts of channels in the genre HD was to be able to track the overall development of HD channels.
- Each linguistic version of a TV channel is counted as a separate service.
- The total number of TV channels available in the EU is not the sum of the services available in each EU country, as the same service may be available in multiple countries.
- For the same reason, the total number of services established outside of the EU is not the difference between the total number of services established in the EU and the number of services available in the EU.

On-demand audiovisual media services

Definition of on-demand audiovisual media services

The European Audiovisual Observatory collects in its MAVISE database a series of information on on-demand audiovisual media services. "On-demand" includes many different categories of services which may or may not be regarded as "On-demand audiovisual media services" in the sense of the AVMS directive. The Observatory cannot determine whether each service should fall under the scope of the directive.

Based on the analysis of services, the MAVISE database uses the following typology:

Table 14 : Classification of on-demand audiovisual services

Category	Definition
Video-on-demand	Pay-access to a catalogue of audiovisual works. In addition, a small number of free VOD services such as Viewster are included as well.
Branded channels of broadcasters	Branded channels of broadcasters on open platforms such as YouTube, Dailymotion, Snack TV.
Catch-up TV services	Provision of recent programmes by a broadcaster after their initial broadcasting and during a limited period of time. Local catch-up TV services are not included as of 2014.
News	Video webpages of newspapers, news TV channels.
Portals	Video webpages of portals such as MSN, Yahoo, portals from Internet Access Providers.
Archives	Film or TV archives.
Sport events	Live retransmission of sport events.
Films trailers	Services aggregating trailers. Branded pages by film producers, distributors or exhibitors are not included.

On-demand audiovisual media services established and available in a country

On-demand audiovisual media services that are **established in a country** include those that a national regulatory authority may hold information about. In addition, other services are included that are clearly of a specific national origin according to company address, Internet domain name, editorial responsibility stated on the services web pages etc. In most cases, however, there is no centralised information available.

On-demand audiovisual media services that are **available in a country** comprise those that are available on platforms of television operators (e.g. DTT, cable, satellite or IPTV) offered as their own or third party services, and on-demand audiovisual media services targeting the country on the open Internet (OTT, e.g. Apple's iTunes, Netflix, Google Play, Megagogo.net).

Limitations to the identification of on-demand services

Please note that identifying on-demand audiovisual media services implies a series of difficulties:

- Whereas on-demand audiovisual media services provided through "managed networks" can be identified through an extensive review of the TV distributors' line-ups, services which are made available over the open Internet are not necessarily heavily advertised.

- Assessing the difference between a stand-alone on-demand audiovisual media service and a catalogue included in a third party service is not always possible. Some producers may exploit a specific "corner" in a larger on-demand service, IPTV or cable providers may host third-party on-demand services alongside their own services, and hence the responsibility for managing the service and for billing the consumer is not always clear.

- Several on-demand audiovisual media services specifically target another country from their country of establishment. Several criteria may apply when assessing whether an on-demand service is a cross-border service: language; offices in the targeted countries; marketing material of the on-demand service; in the case of catch-up television services, the fact that the broadcaster that is managing the catch-up TV service targets another country itself.

Cautionary note on the use of figures for on-demand audiovisual services

When using the figures for on-demand audiovisual services, the following should be taken into account:

- The comparison between 2013 and 2015 is only indicative as the perimeter of on-demand audiovisual media services tracked in MAVISE has evolved, in particular as regards the local catch-up television services and branded channels on YouTube which are no longer included.

- With regard to the figures for US-based VOD services, it should be noted that despite the sometimes significant numeric presence of these channels in a given national market these services only have a very limited market power. Many of the services included in the figures are micro-channels on YouTube and niche services of sport leagues (e.g. NHL, MLB and WWE. In addition, the number of these services is set to be further reduced due to data cleaning effects (e.g. inclusion of only one Xbox Video VOD service per country as opposed to counting several catalogues of studios on Xbox Video each as one distinct VOD service).

- Each linguistic version of a service is counted as a different service.

- The total number of services available in the EU is <u>not</u> the sum of the services available in each EU country, as the same service may be available in multiple countries.

- For the same reason, the total number of services established outside of the EU is <u>not</u> the difference between the total number of services established in the EU and the number of services available in the EU.

1.2 Country profiles for linear and on-demand audiovisual media services

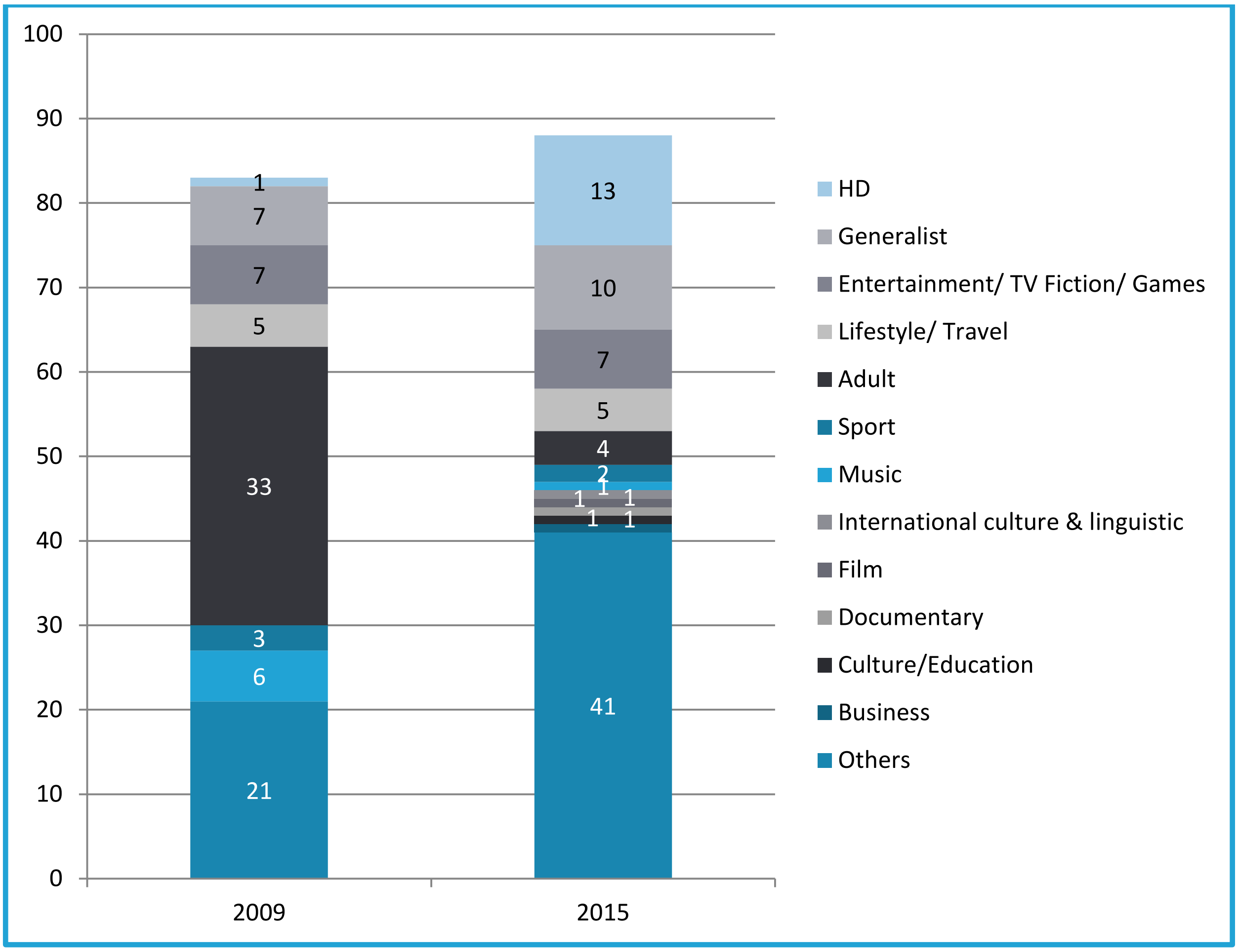
The following sub-section provides an overview on a country by country basis for the 28 EU member states regarding the following:

- Linear audiovisual media services established in a country by genre (2009, 2015)
- VOD services available in a country by country of establishment (2013, 2015)

Countries are listed in alphabetical order according to their country ISO code.

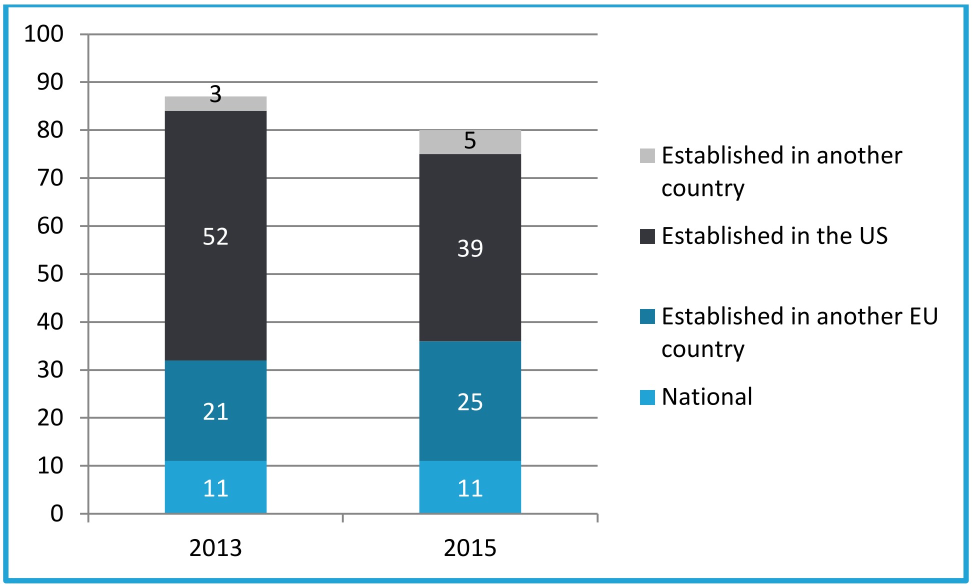
AT – Austria

Figure 7: Number of linear audiovisual media services established in Austria by genre (2009, 2015)



Source: European Audiovisual Observatory / MAVISE database

Figure 8: Number of video-on-demand services available in Austria by country of establishment (2013, 2015)



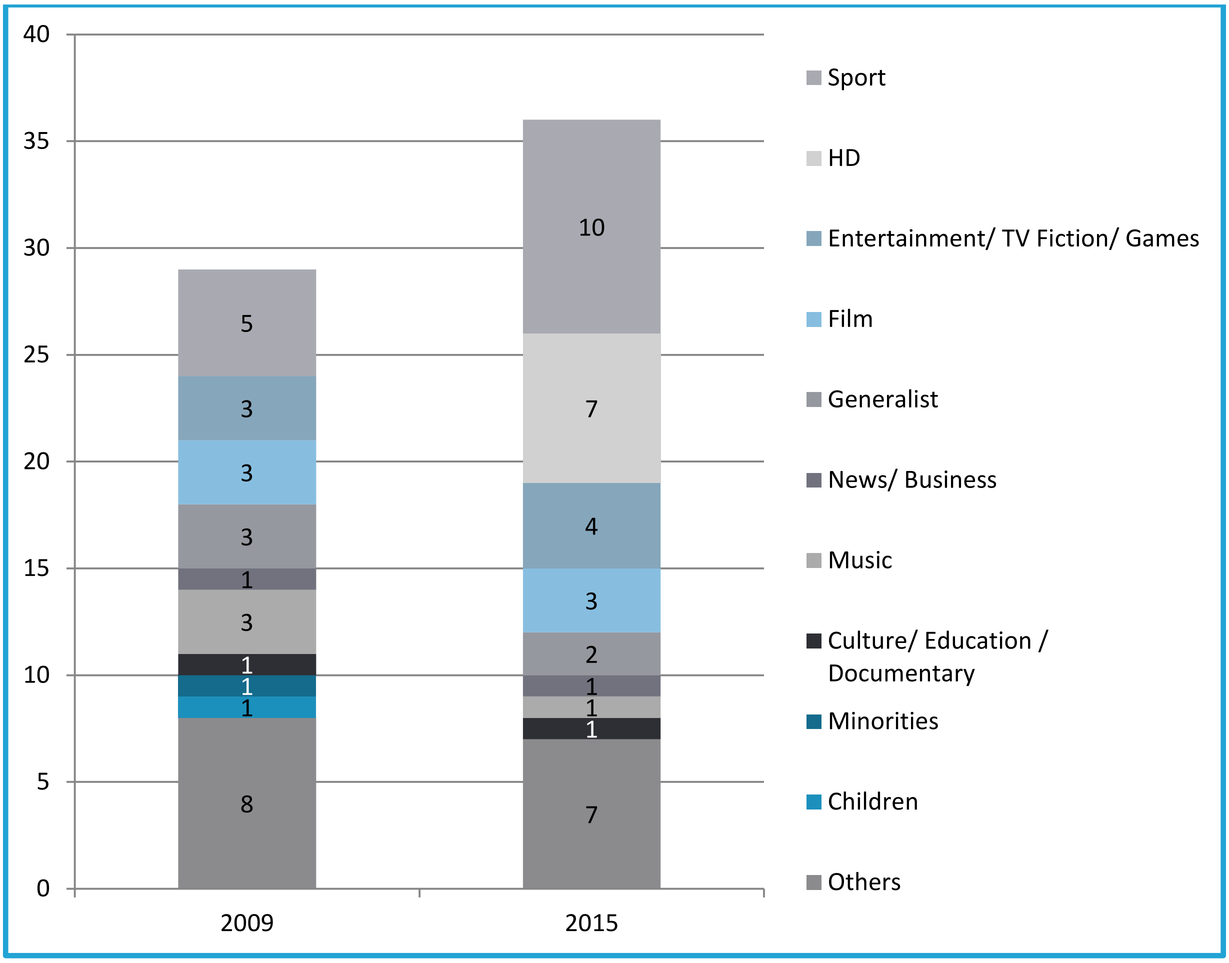
Source: European Audiovisual Observatory / MAVISE database

BE – Belgium

The German-speaking Community of Belgium has one national channel established under its jurisdiction – the generalist channel BRF TV of the Belgischer Rundfunk (BRF). Belgium is also home to the 46 language versions of Europe by Satellite (EbS), the TV information service of the European Union.

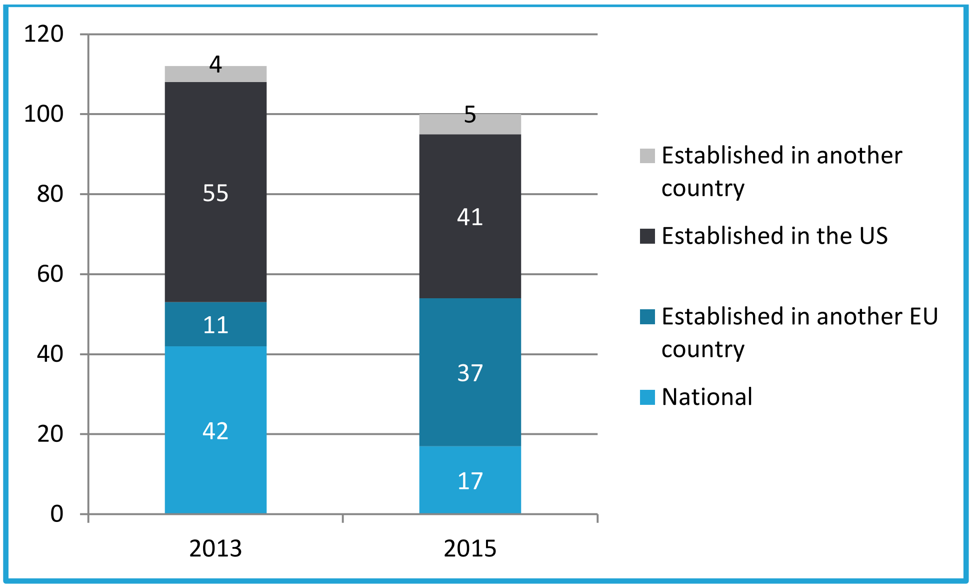
The French Community of Belgium

Figure 9: Number of linear audiovisual media services established in the French Community of Belgium by genre (2009, 2015)



Source: European Audiovisual Observatory / MAVISE database

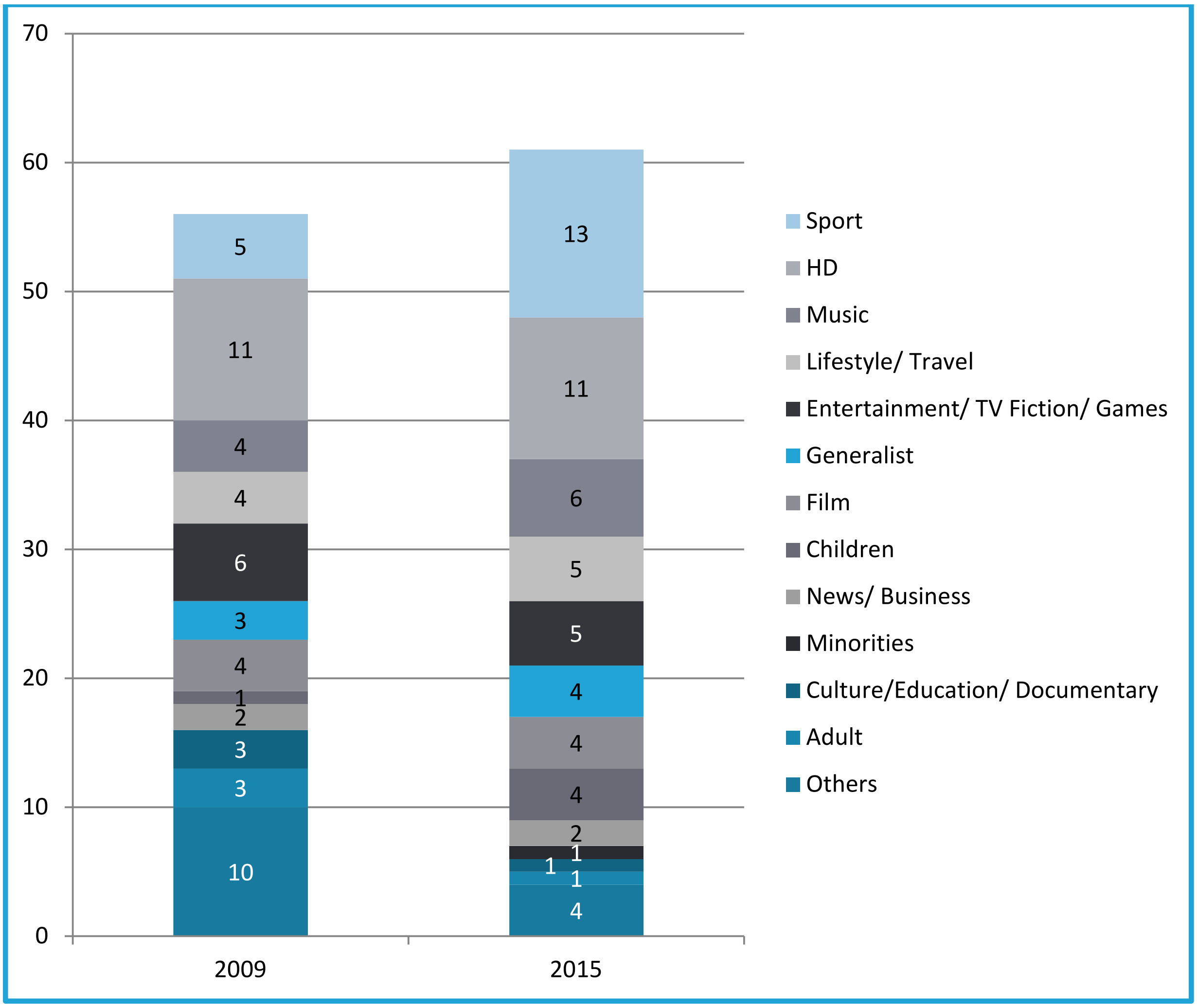
Figure 10: Number of video-on-demand services available in the French Community of Belgium by country of establishment (2013, 2015)



Source: European Audiovisual Observatory / MAVISE database

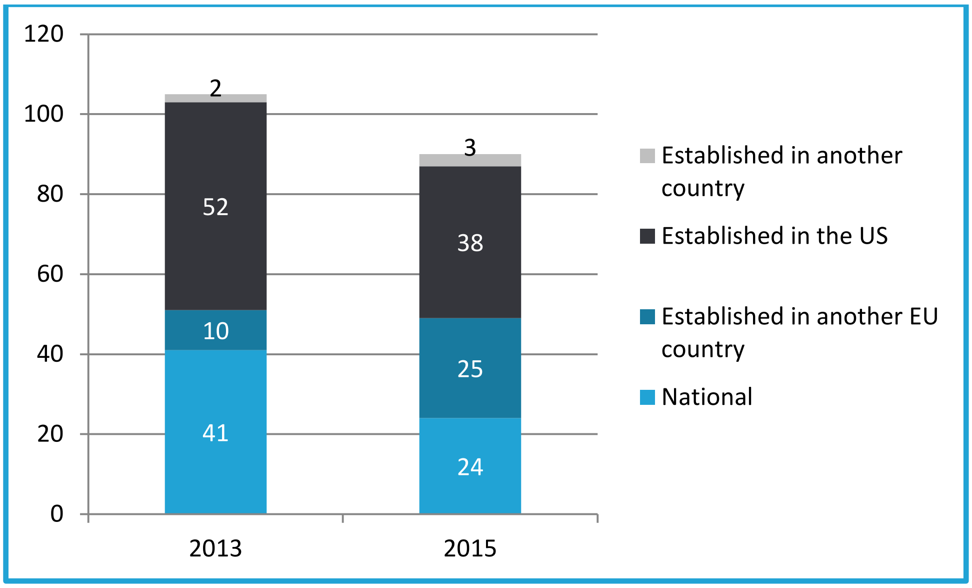
Flemish Community of Belgium

Figure 11: Number of linear audiovisual media services established in the Flemish Community of Belgium by genre (2009, 2015)



Source: European Audiovisual Observatory / MAVISE database

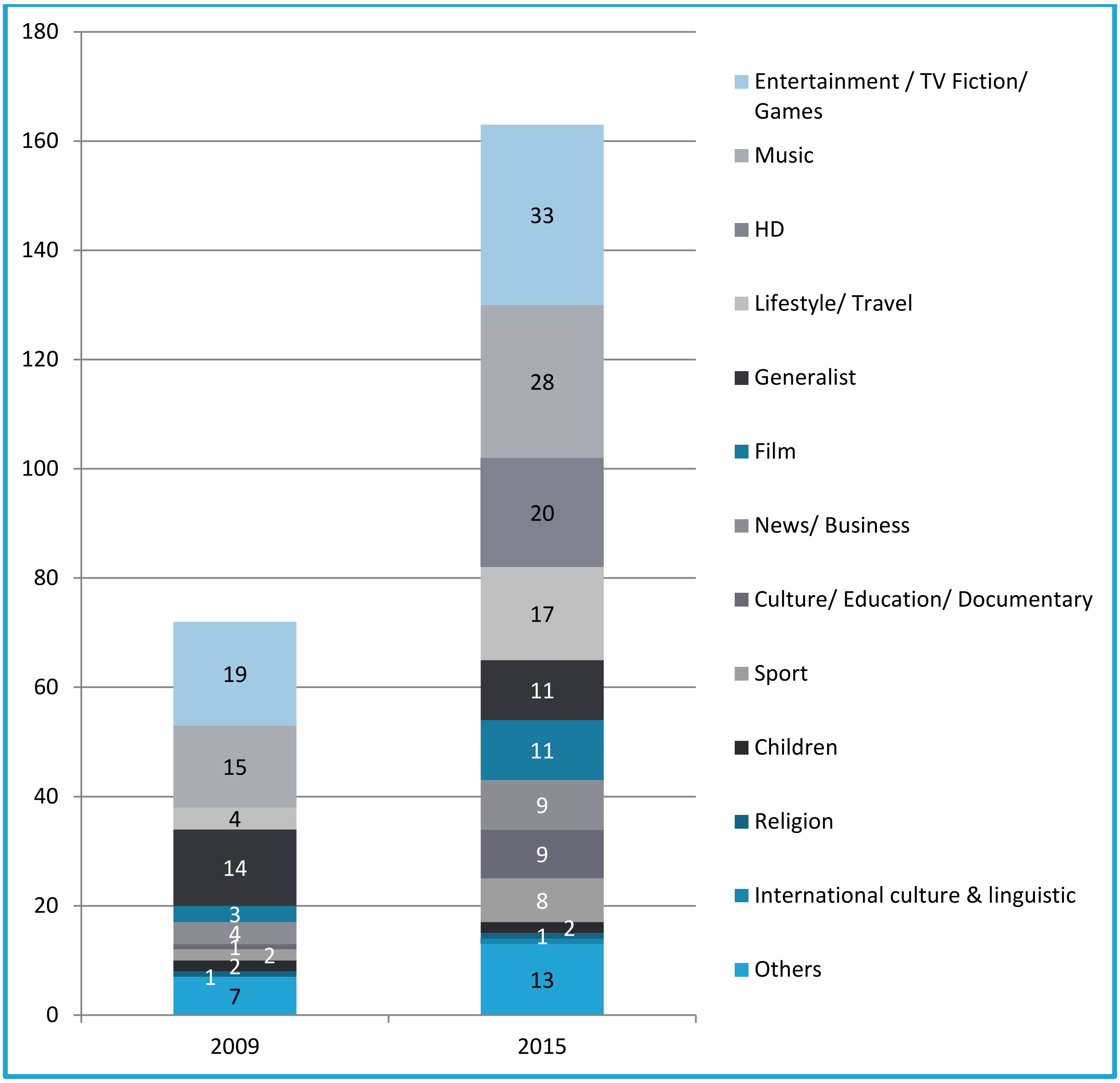
Figure 12: Number of video-on-demand services available in the Flemish Community of Belgium by country of establishment (2013, 2015)



Source: European Audiovisual Observatory / MAVISE database

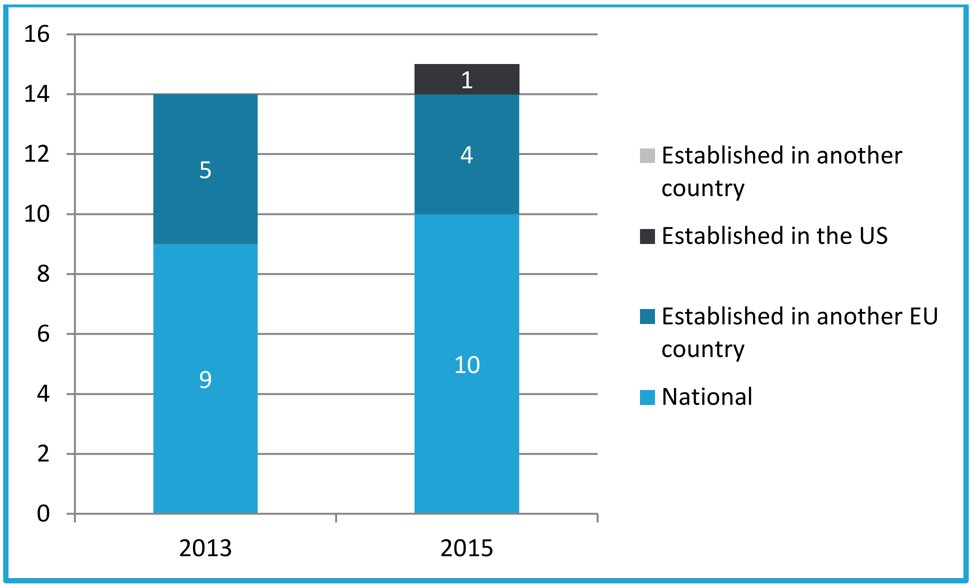
BG – Bulgaria

Figure 13: Number of linear audiovisual media services established in Bulgaria by genre (2009, 2015)



Source: European Audiovisual Observatory / MAVISE database

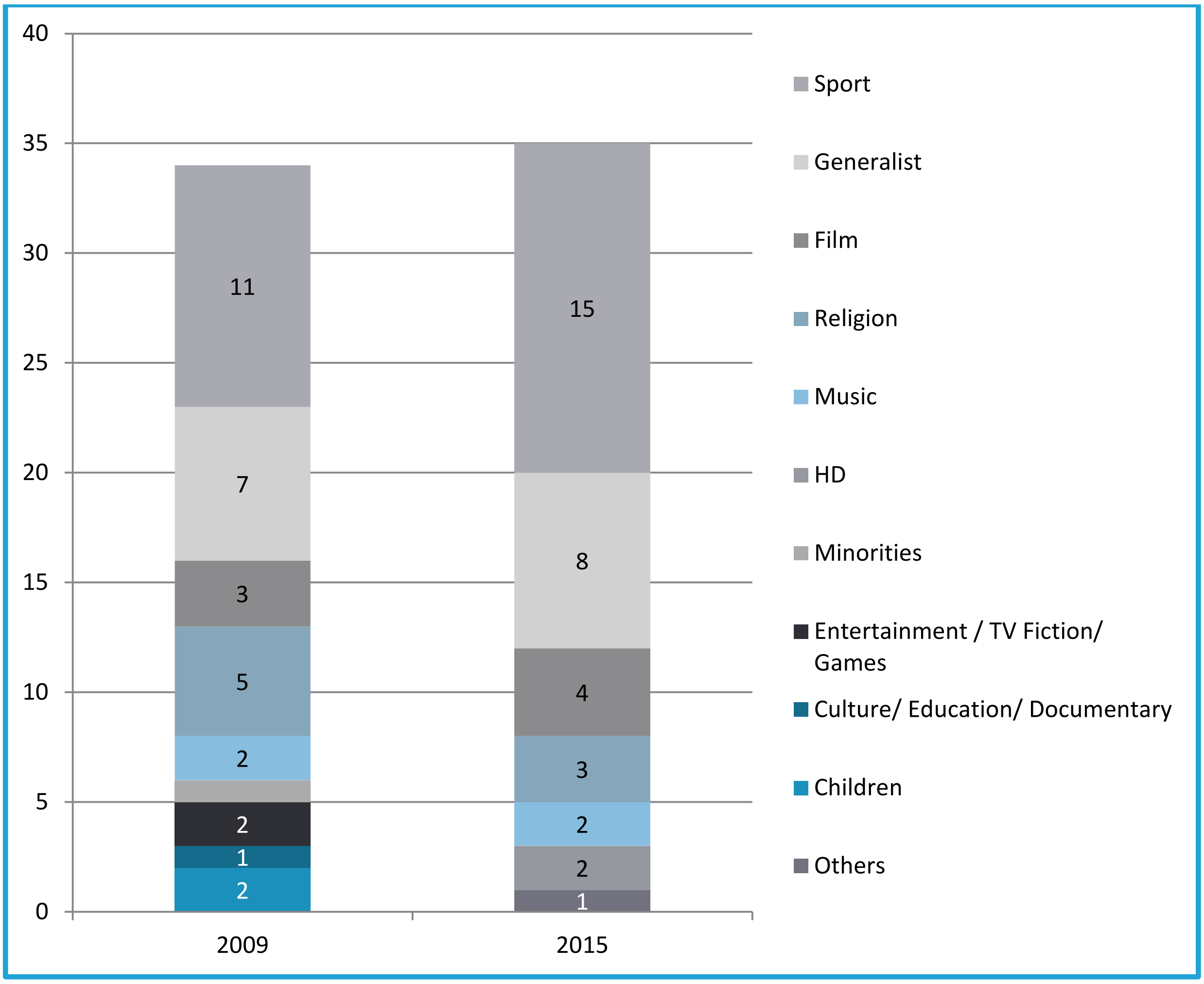
Figure 14: Number of video-on-demand services available in Bulgaria by country of establishment (2013, 2015)



Source: European Audiovisual Observatory / MAVISE database

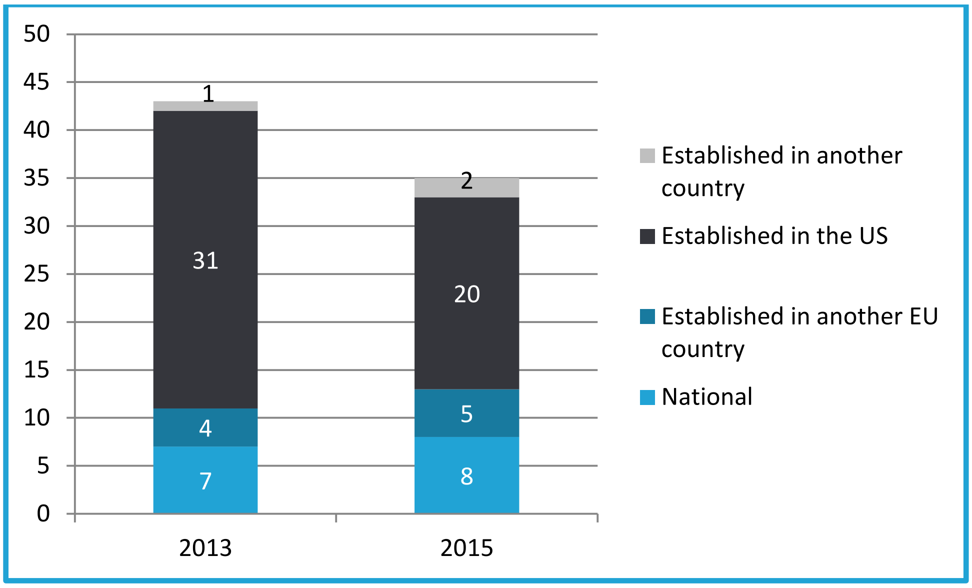
CY – Cyprus

Figure 15: Number of linear audiovisual media services established in Cyprus by genre (2009, 2015)



Source: European Audiovisual Observatory / MAVISE database

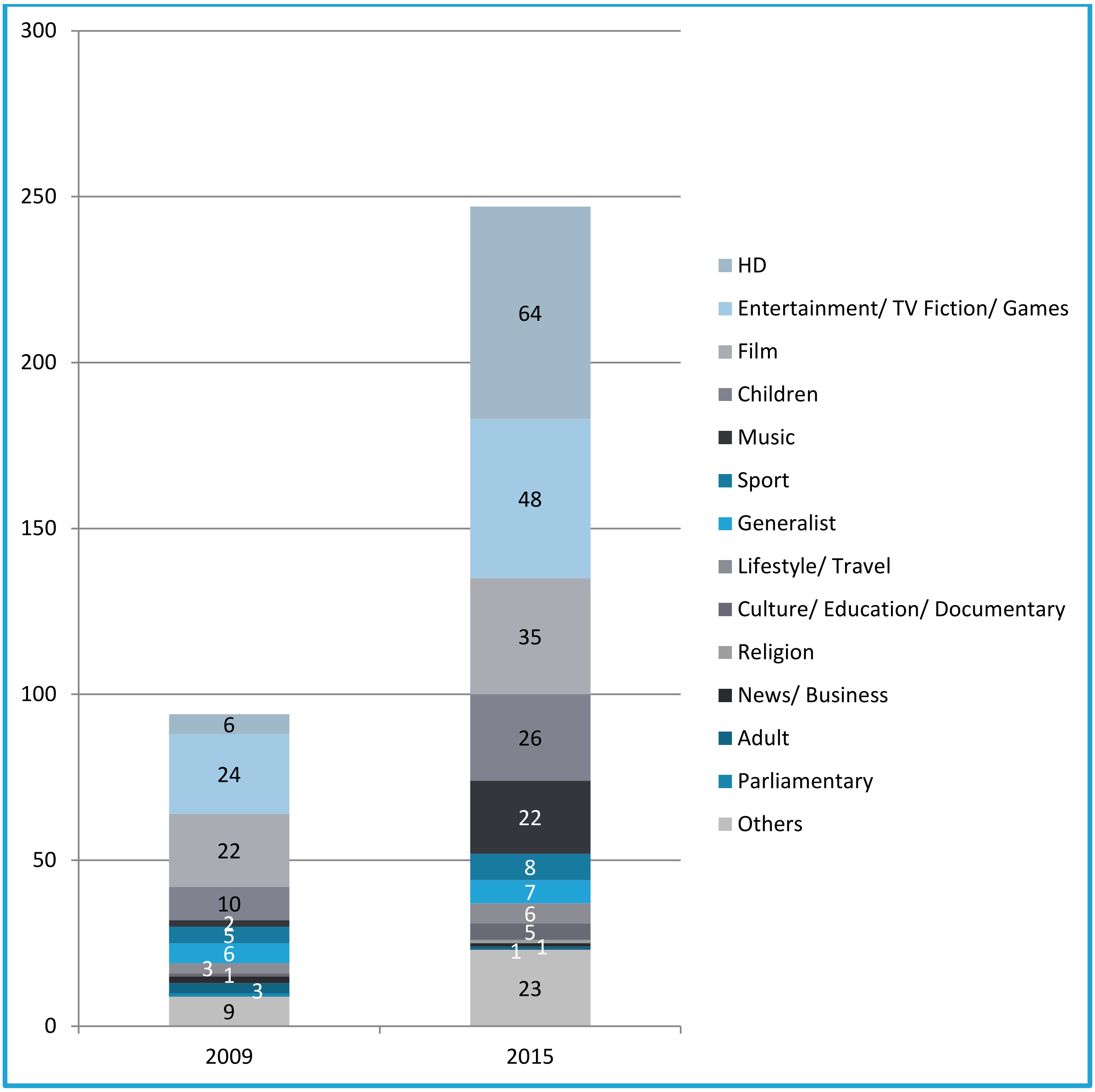
Figure 16: Number of video-on-demand services available in Cyprus by country of establishment (2013, 2015)



Source: European Audiovisual Observatory / MAVISE database

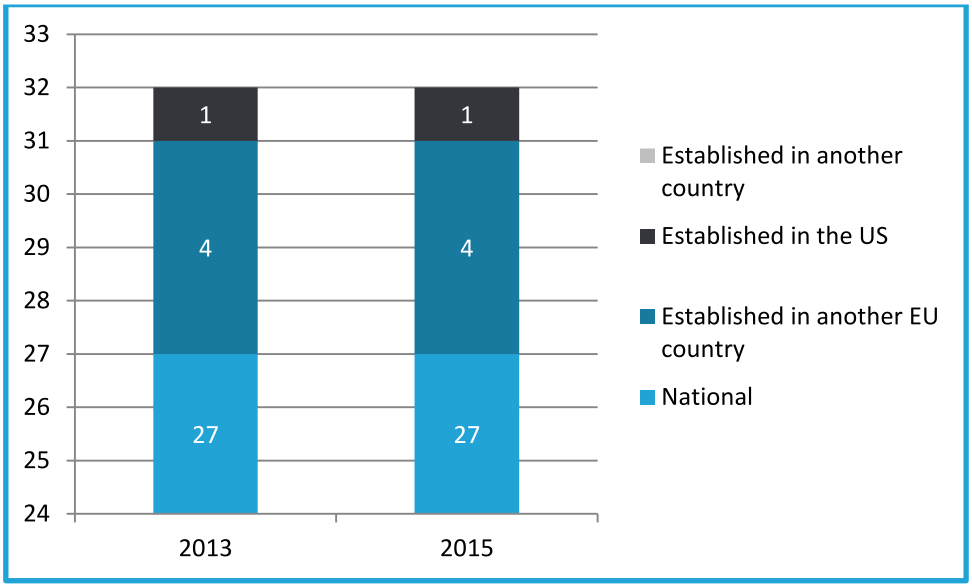
CZ – Czech Republic

Figure 17: Number of linear audiovisual media services established in the Czech Republic by genre (2009, 2015)



Source: European Audiovisual Observatory / MAVISE database

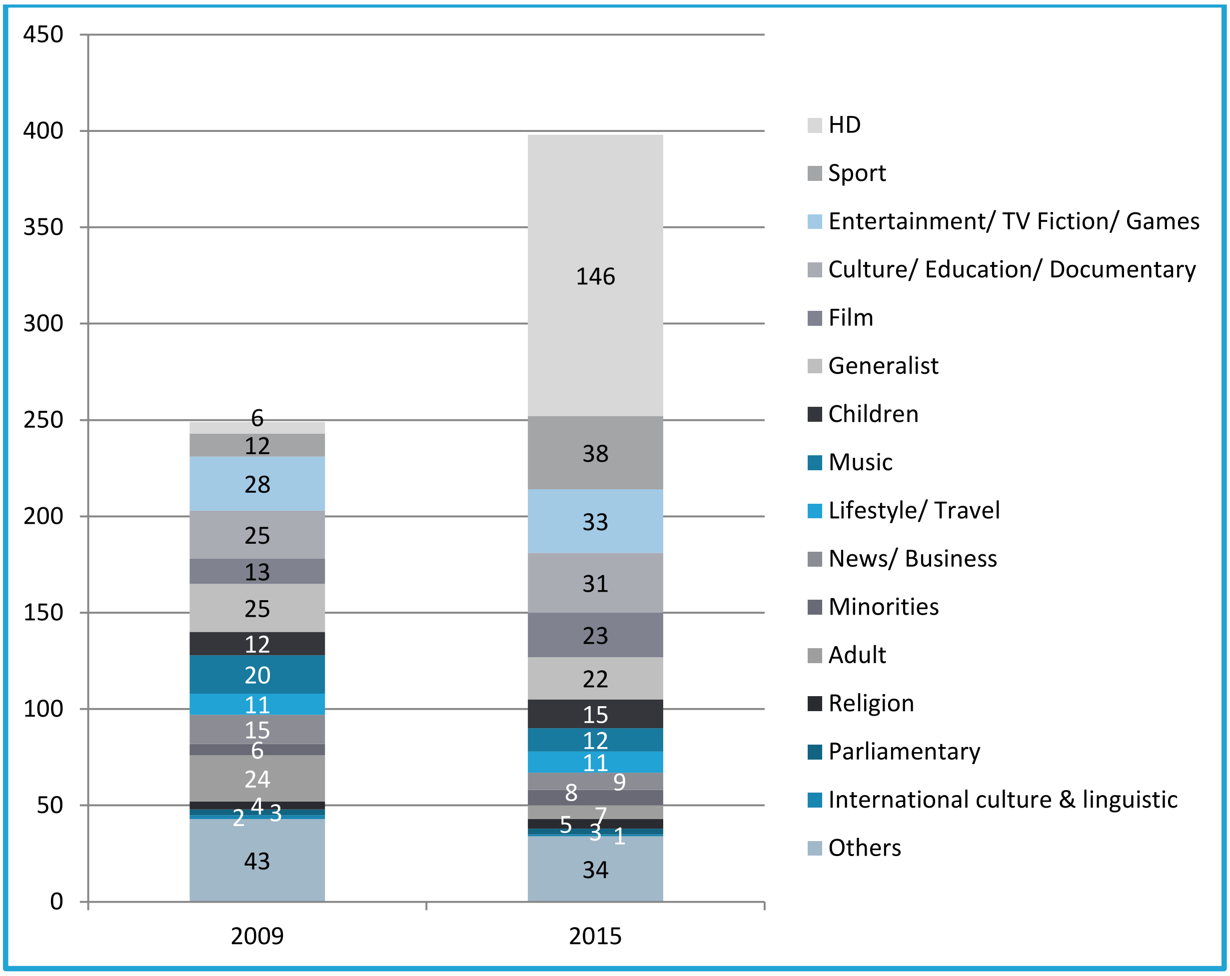
Figure 18: Number of video-on-demand services available in the Czech Republic by country of establishment (2013, 2015)



Source: European Audiovisual Observatory / MAVISE database

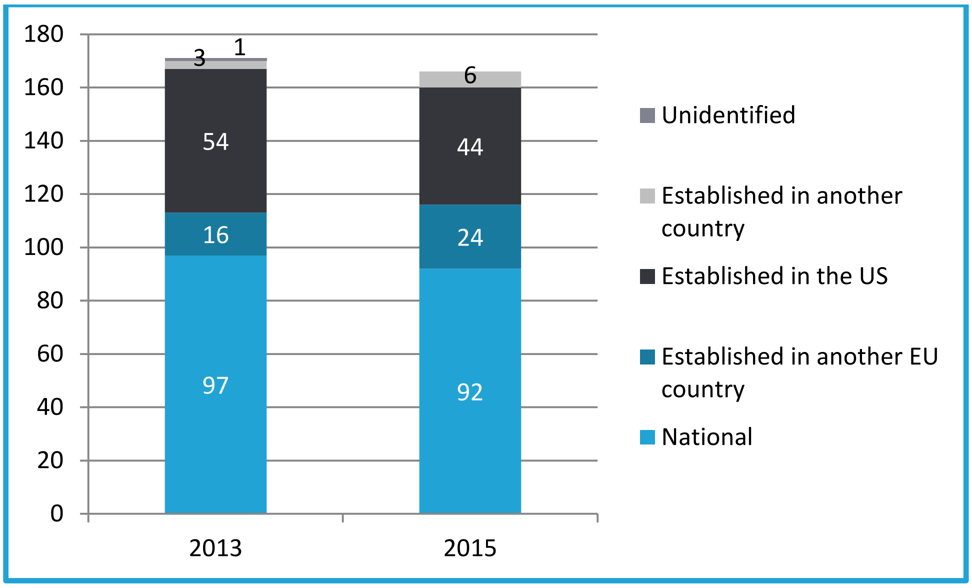
DE – Germany

Figure 19: Number of linear audiovisual media services established in Germany by genre (2009, 2015)



Source: European Audiovisual Observatory / MAVISE database

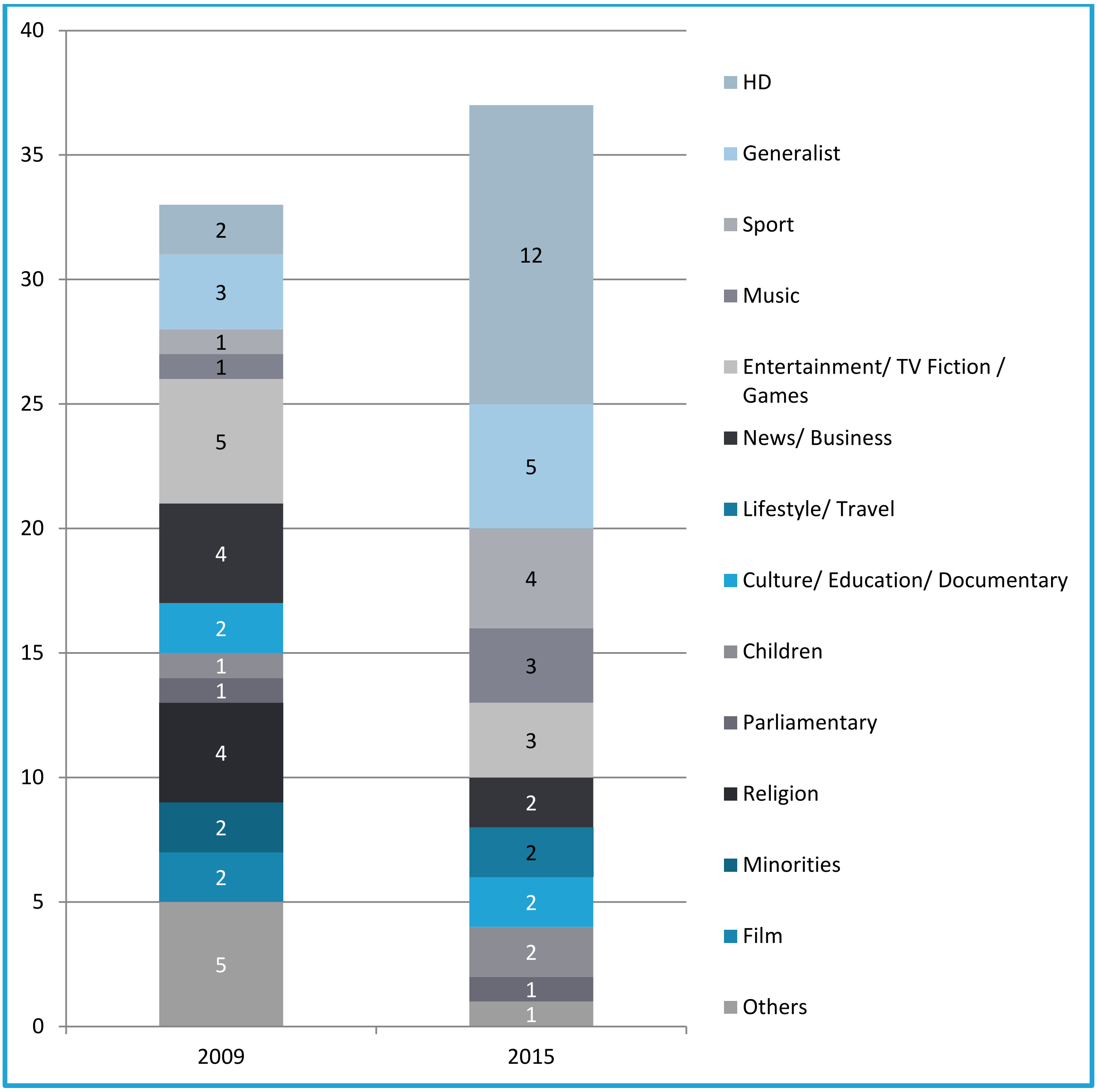
Figure 20: Number of video-on-demand services available in Germany by country of establishment (2013, 2015)



Source: European Audiovisual Observatory / MAVISE database

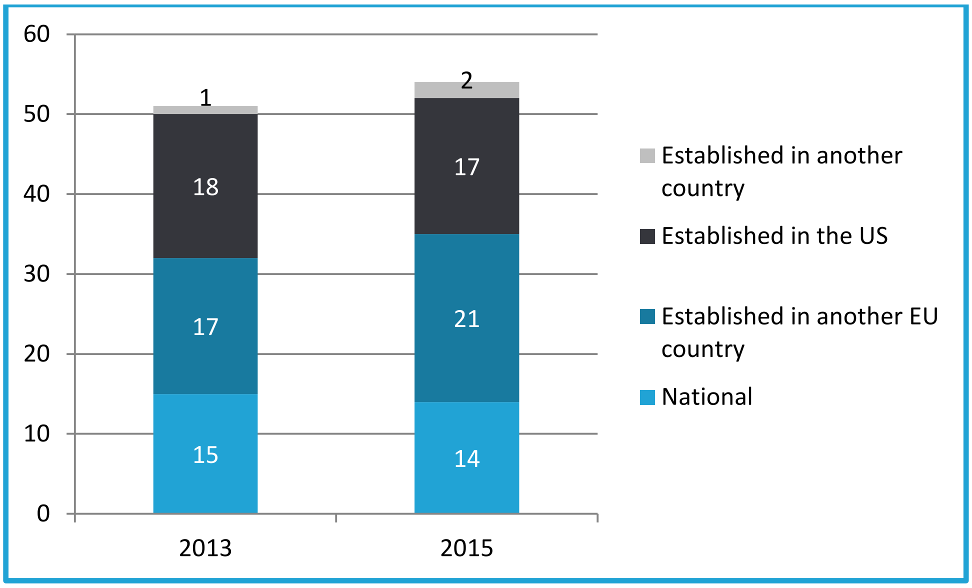
DK – Denmark

Figure 21: Number of linear audiovisual media services established in Denmark by genre (2009, 2015)



Source: European Audiovisual Observatory / MAVISE database

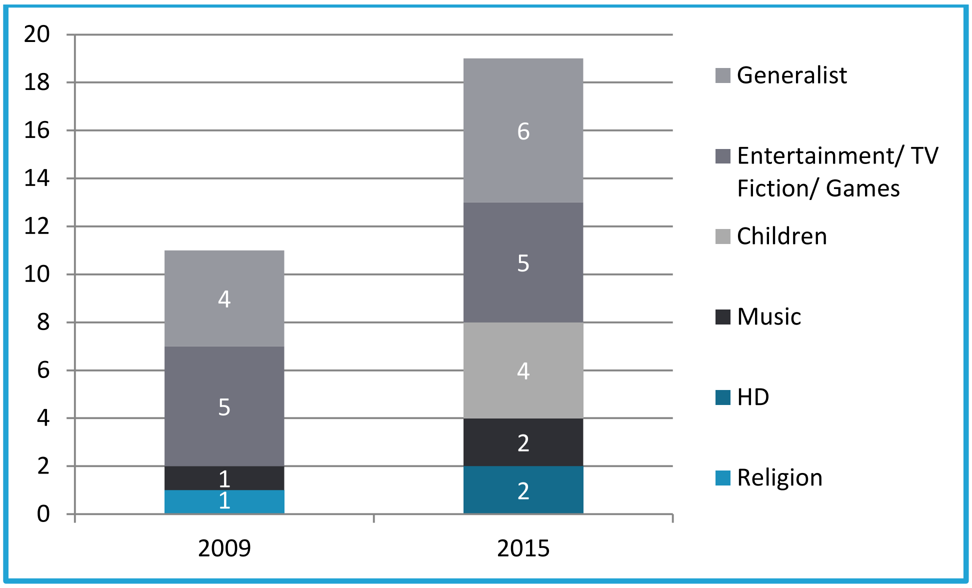
Figure 22: Number of video-on-demand services available in Denmark by country of establishment (2013, 2015)



Source: European Audiovisual Observatory / MAVISE database

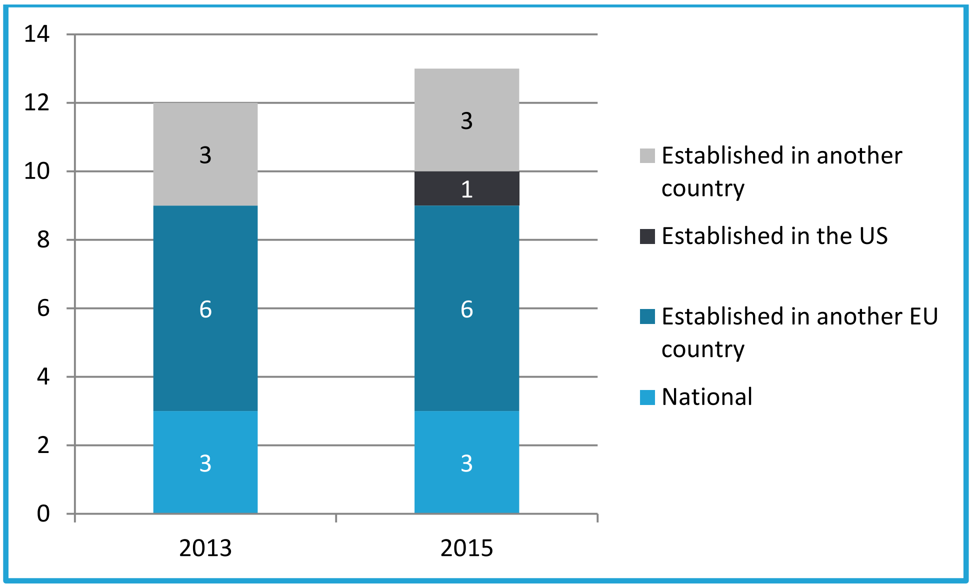
EE – Estonia

Figure 23: Number of linear audiovisual media services established in Estonia by genre (2009, 2015)



Source: European Audiovisual Observatory / MAVISE database

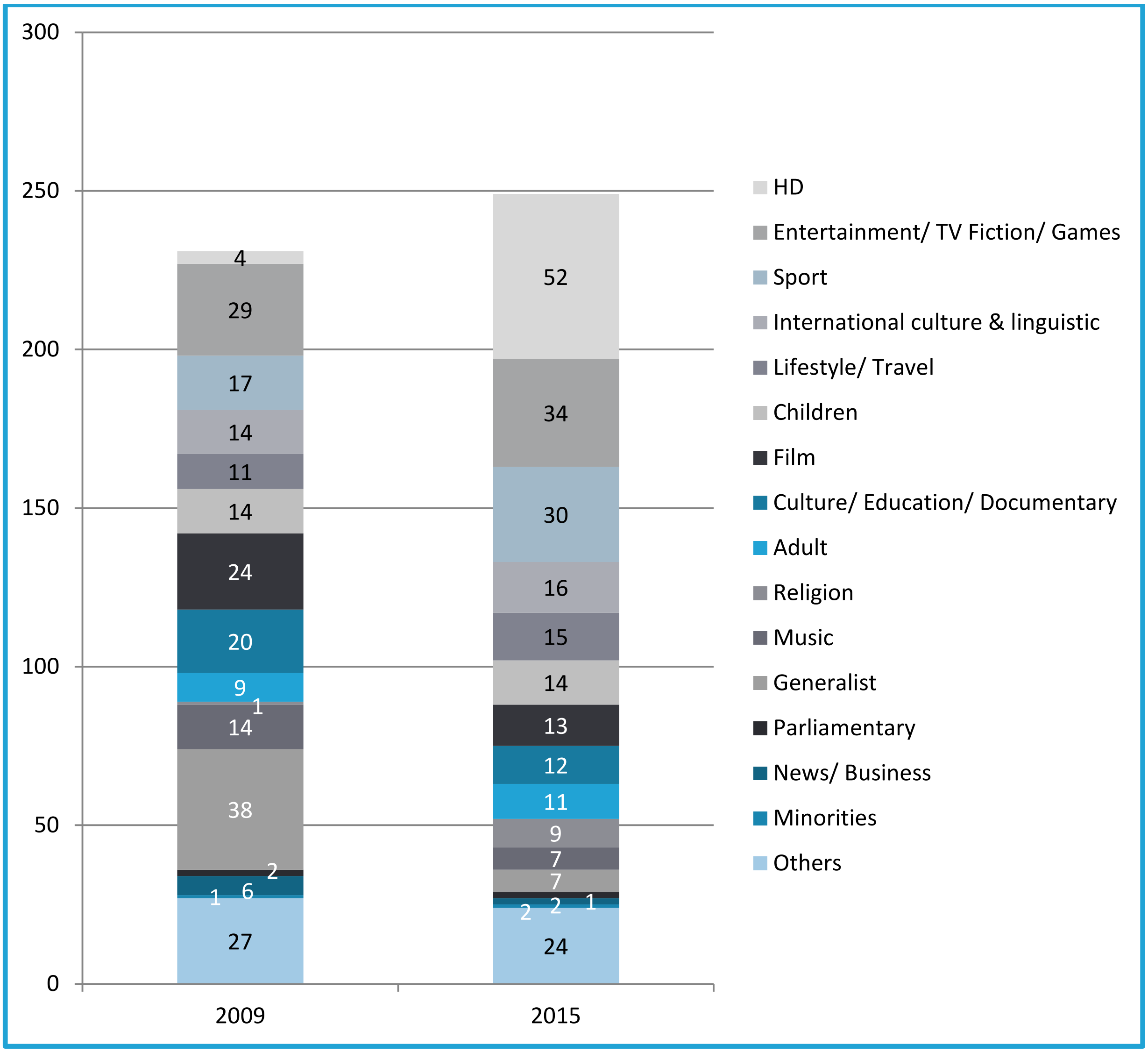
Figure 24: Number of video-on-demand services available in Estonia by country of establishment (2013, 2015)



Source: European Audiovisual Observatory / MAVISE database

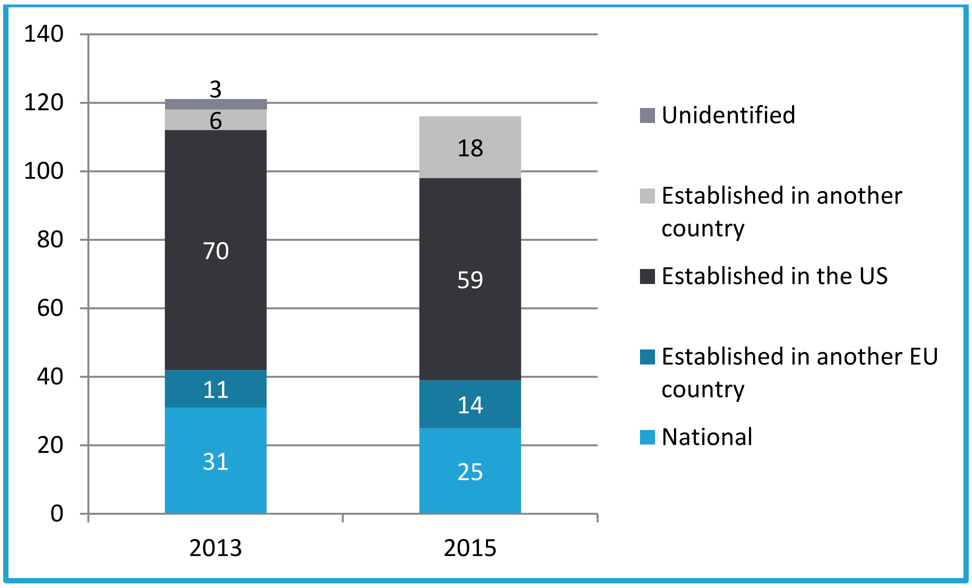
ES – Spain

Figure 25: Number of linear audiovisual media services established in Spain by genre (2009, 2015)



Source: European Audiovisual Observatory / MAVISE database

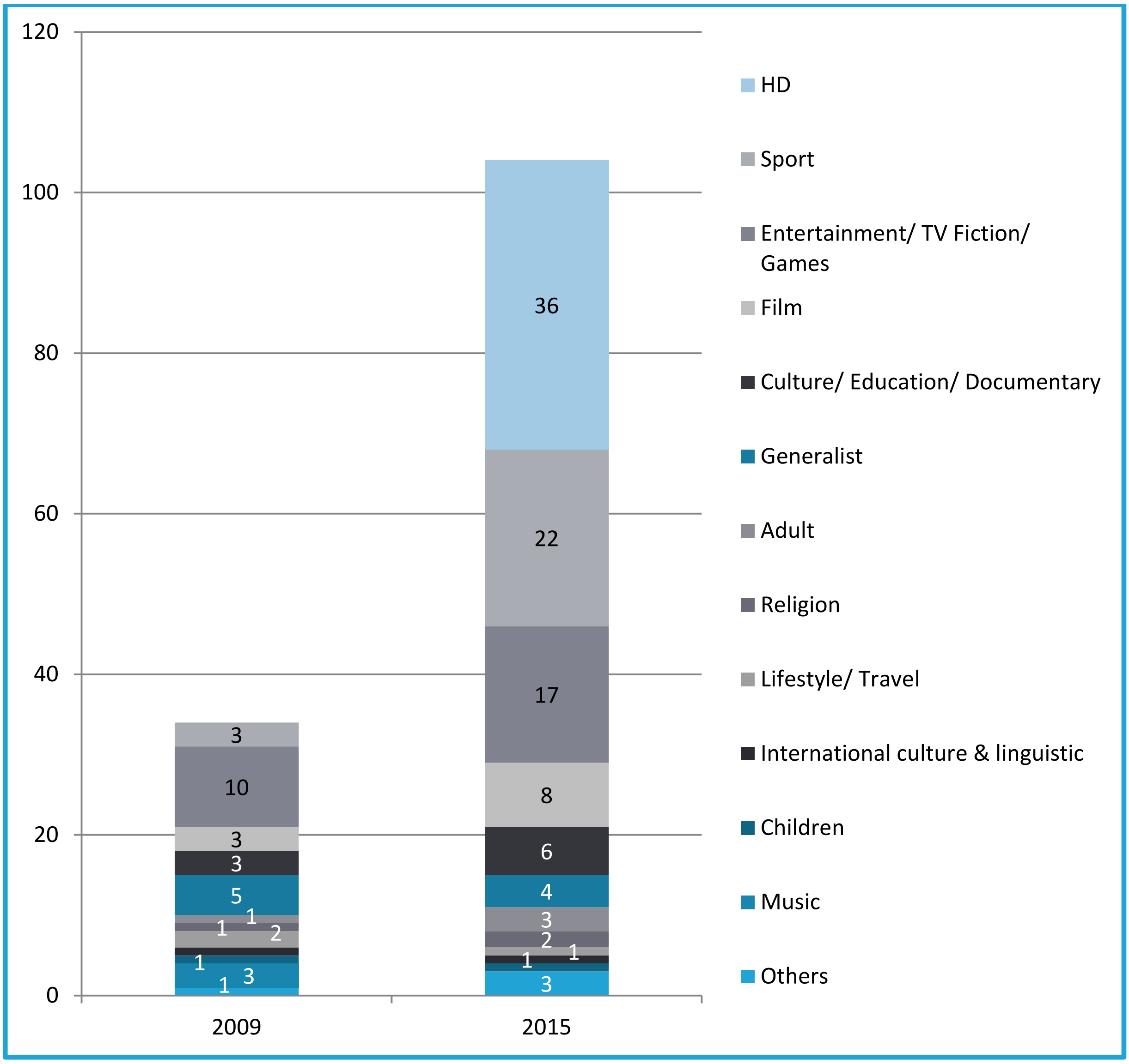
Figure 26: Number of video-on-demand services available in Spain by country of establishment (2013, 2015)



Source: European Audiovisual Observatory / MAVISE database

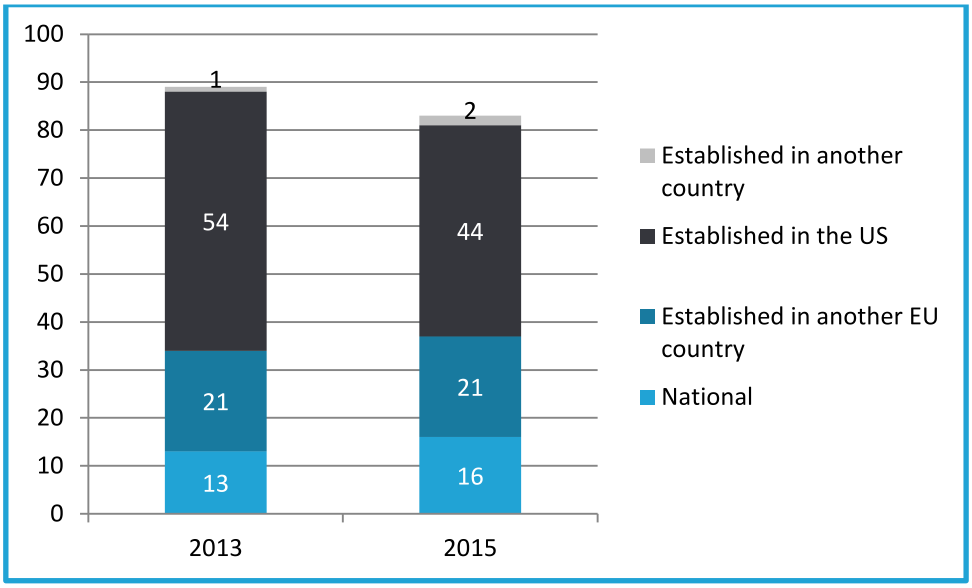
FI – Finland

Figure 27: Number of linear audiovisual media services established in Finland by genre (2009, 2015)



Source: European Audiovisual Observatory / MAVISE database

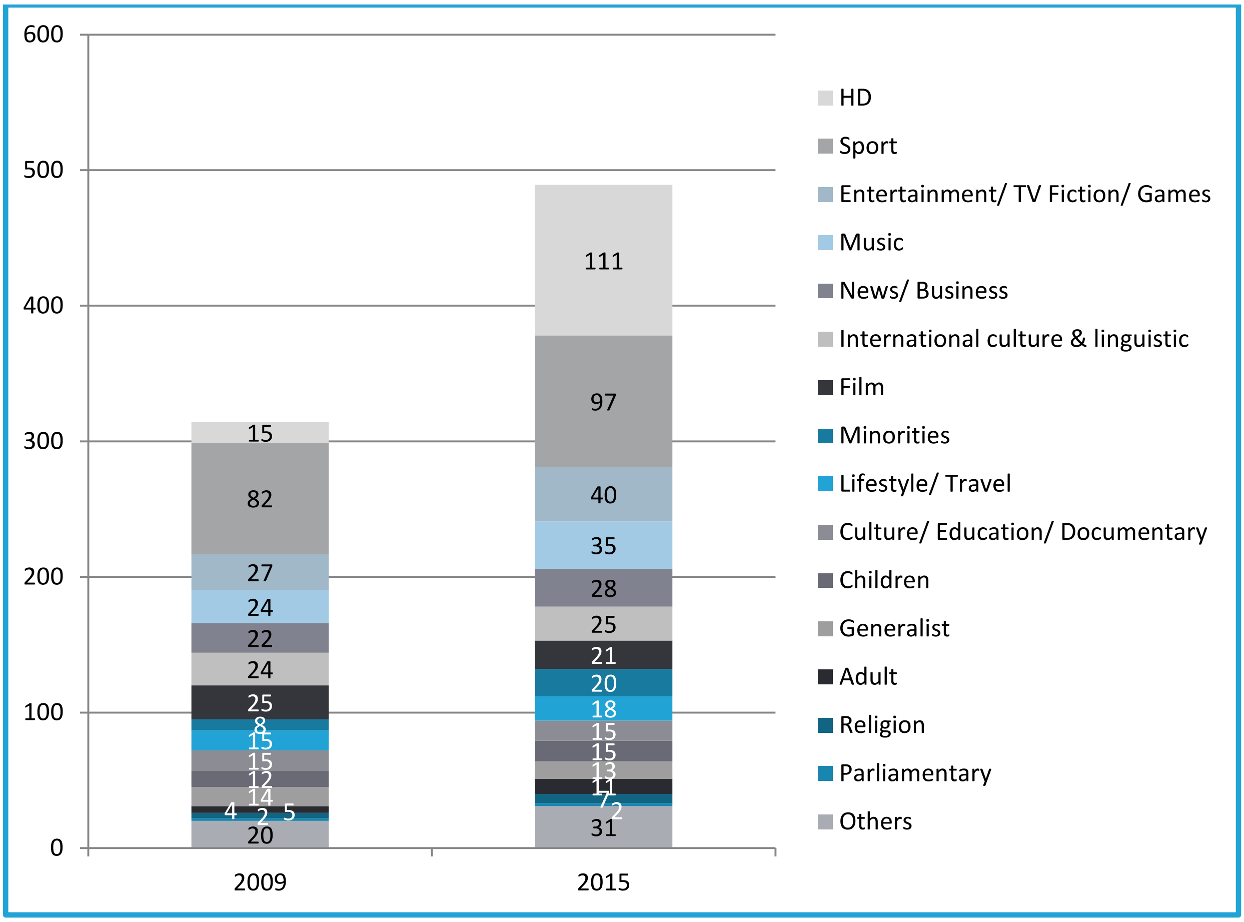
Figure 28: Number of video-on-demand services available in Finland by country of establishment (2013, 2015)



Source: European Audiovisual Observatory / MAVISE database

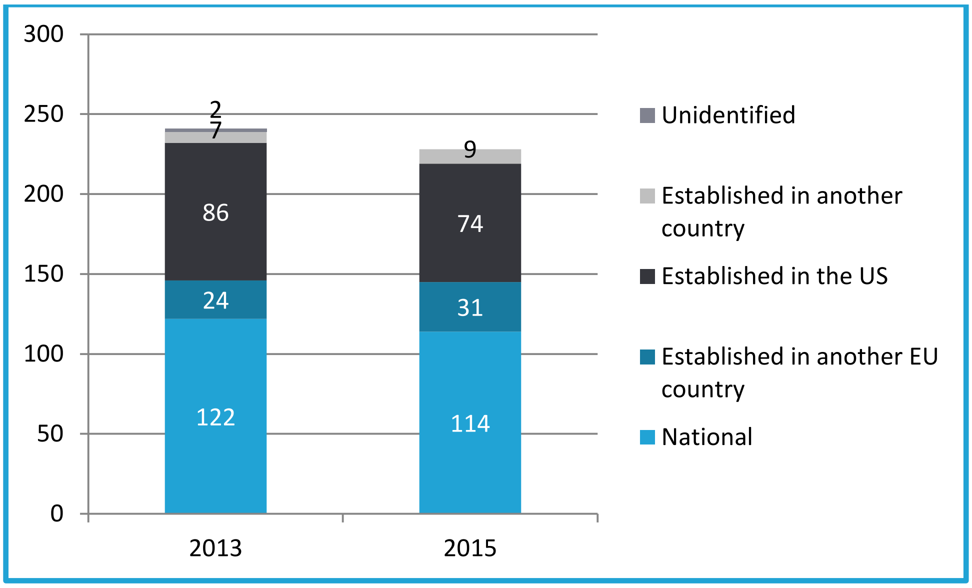
FR – France

Figure 29: Number of linear audiovisual media services established in France by genre (2009, 2015)



Source: European Audiovisual Observatory / MAVISE database

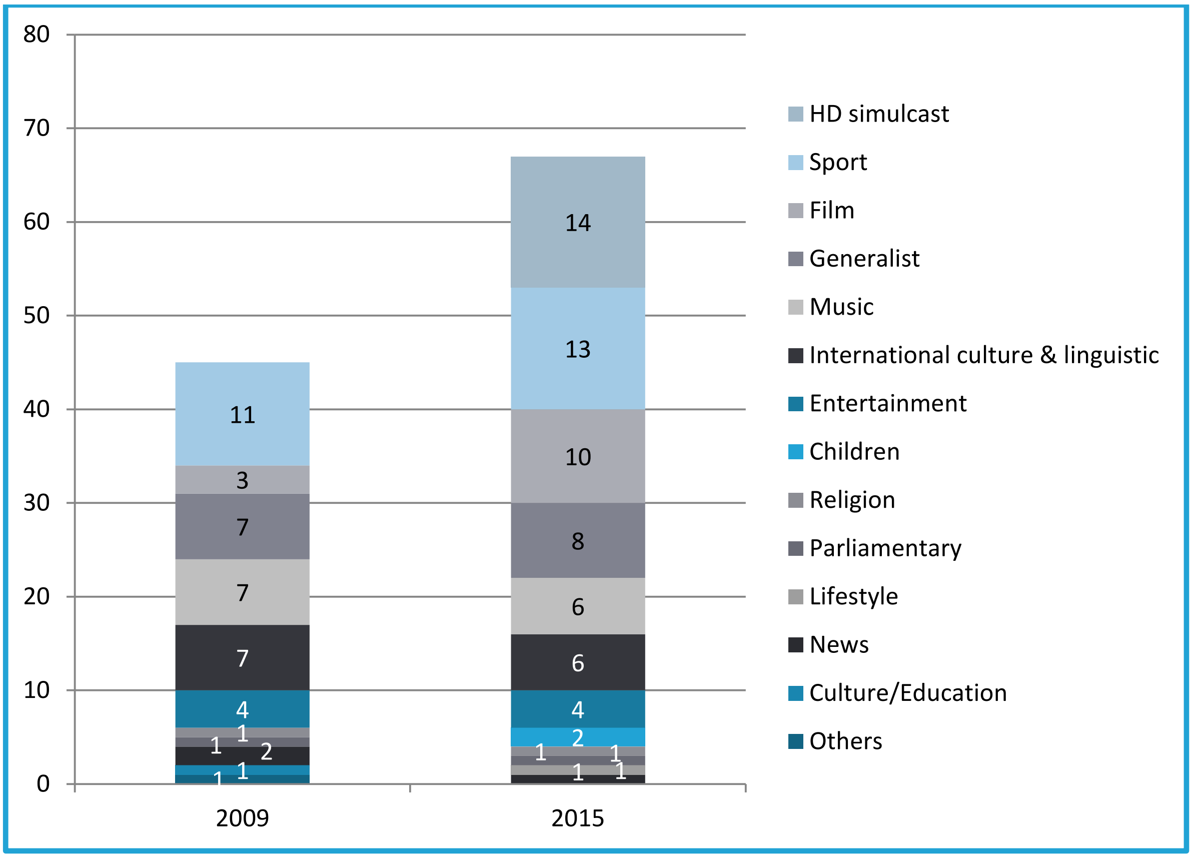
Figure 30: Number of video-on-demand services available in France by country of establishment (2013, 2015)



Source: European Audiovisual Observatory / MAVISE database

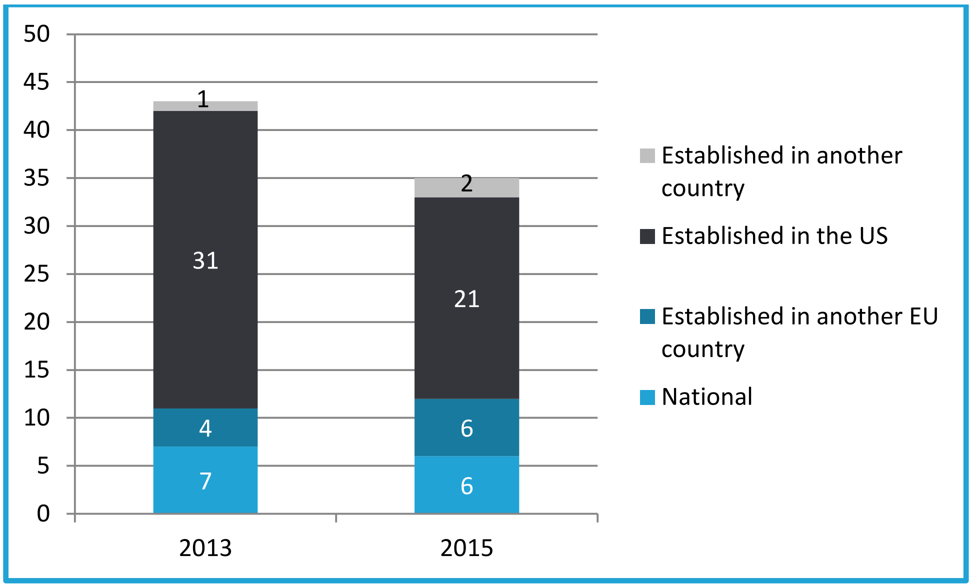
GR – Greece

Figure 31: Number of linear audiovisual media services established in Greece by genre (2009, 2015)



Source: European Audiovisual Observatory / MAVISE database

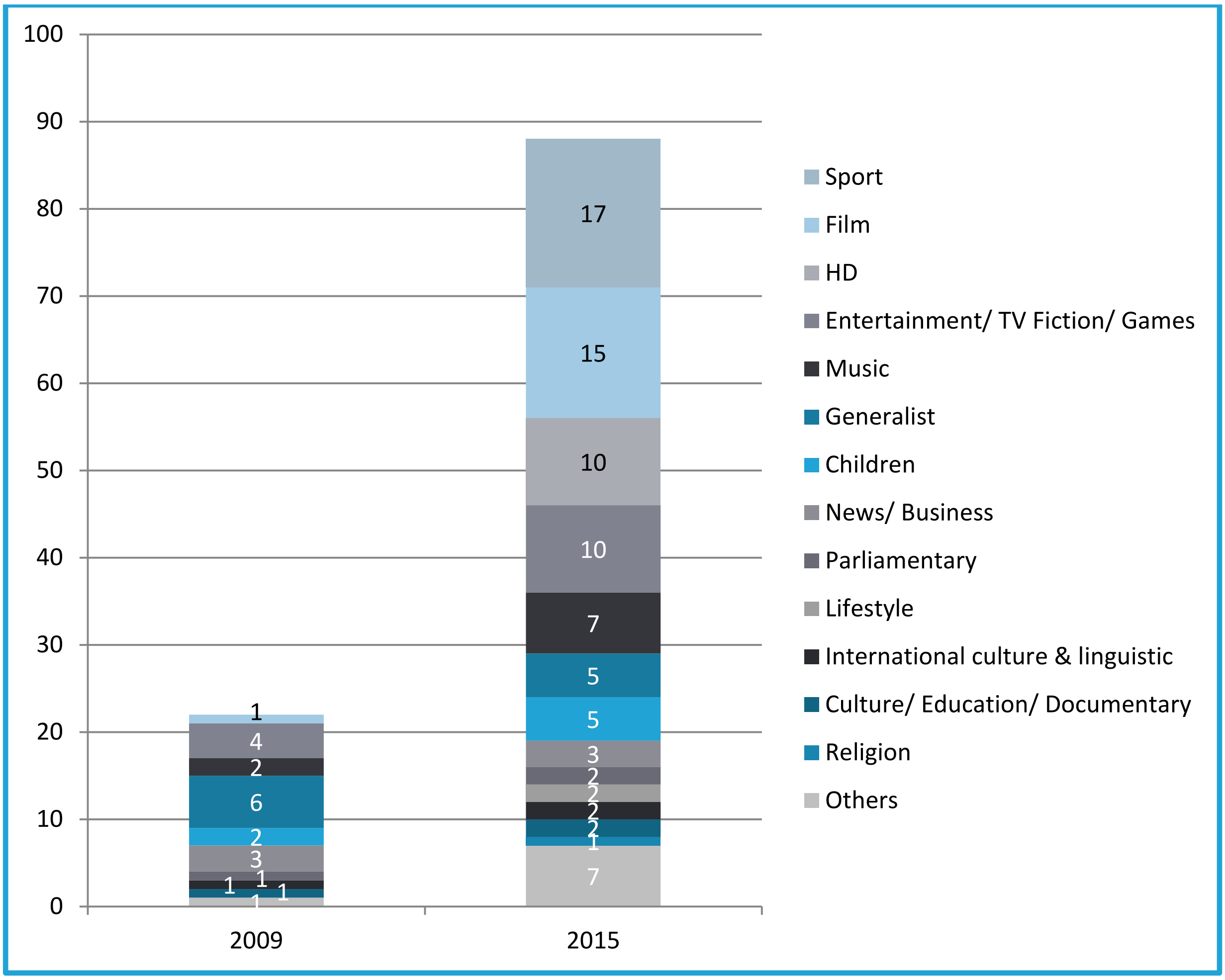
Figure 32: Number of video-on-demand services available in Greece by country of establishment (2013, 2015)



Source: European Audiovisual Observatory / MAVISE database

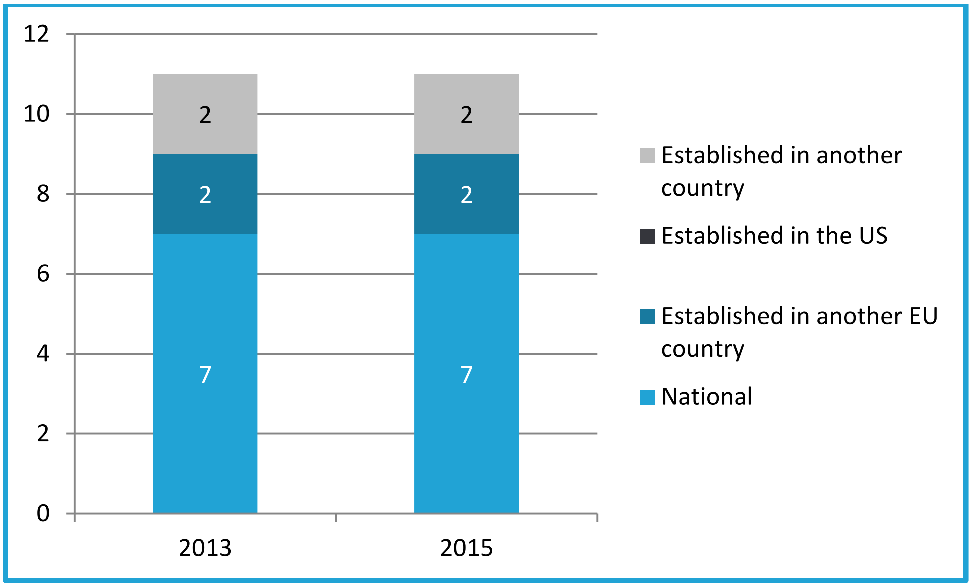
HR – Croatia

Figure 33: Number of linear audiovisual media services established in Croatia by genre (2009, 2015)



Source: European Audiovisual Observatory / MAVISE database

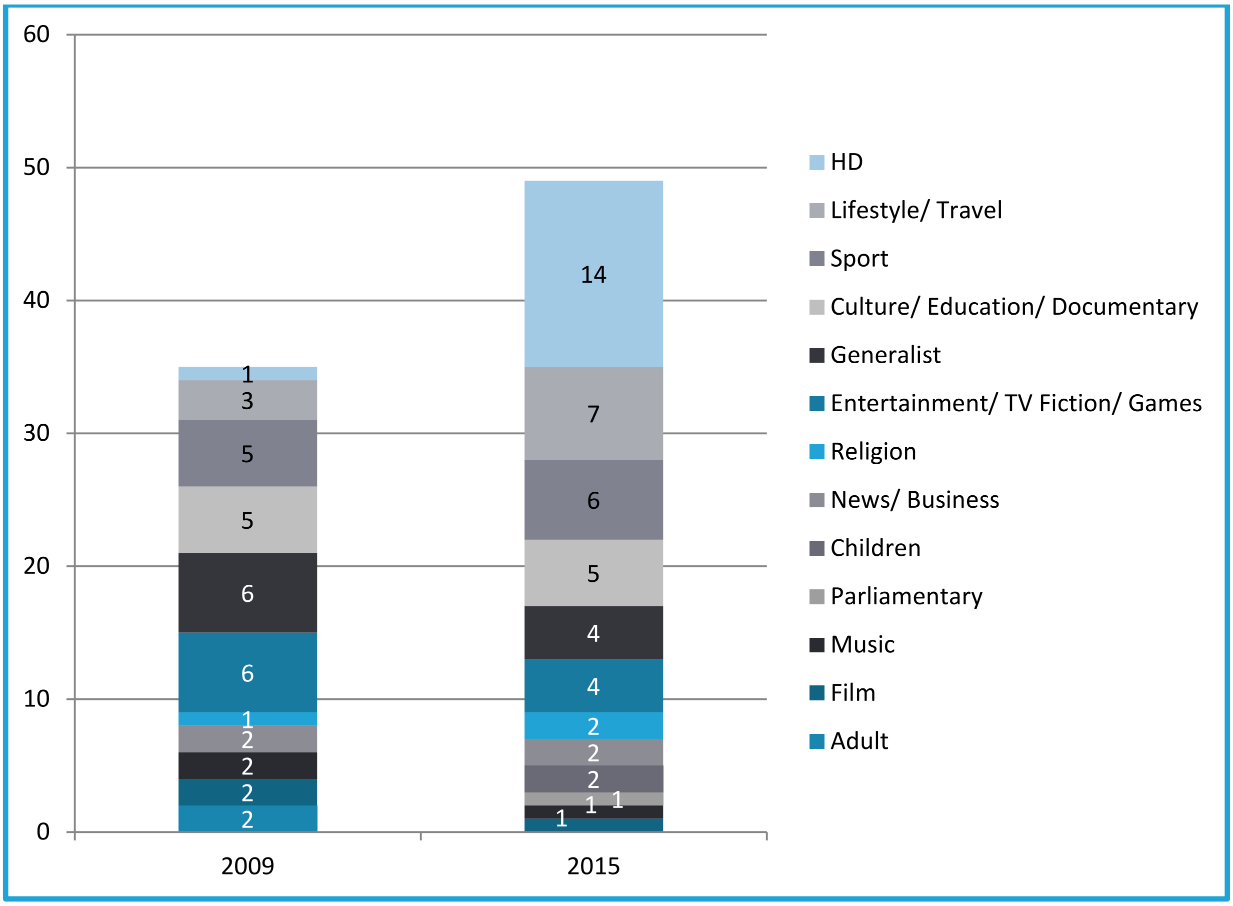
Figure 34: Number of video-on-demand services available in Croatia by country of establishment (2013, 2015)



Source: European Audiovisual Observatory / MAVISE database

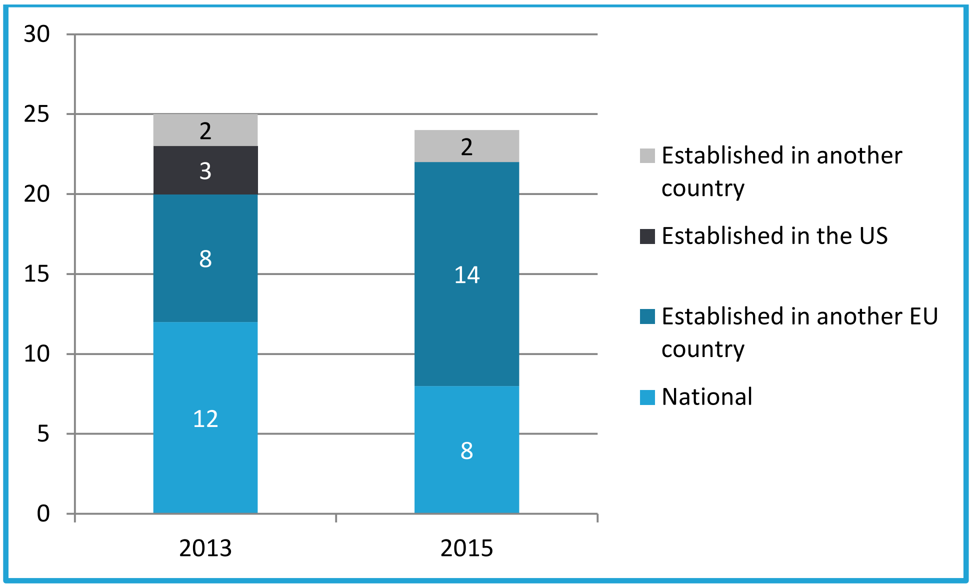
HU – Hungary

Figure 35: Number of linear audiovisual media services established in Hungary by genre (2009, 2015)



Source: European Audiovisual Observatory / MAVISE database

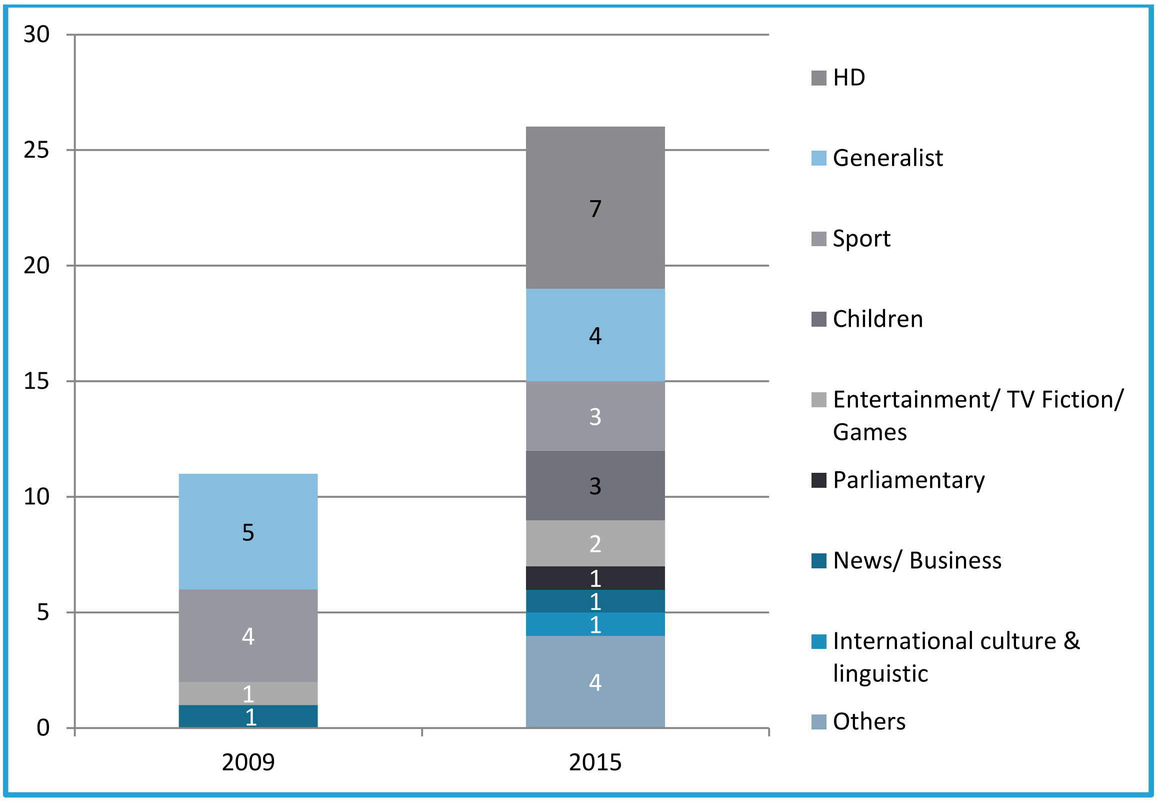
Figure 36: Number of video-on-demand services available in Hungary by country of establishment (2013, 2015)



Source: European Audiovisual Observatory / MAVISE database

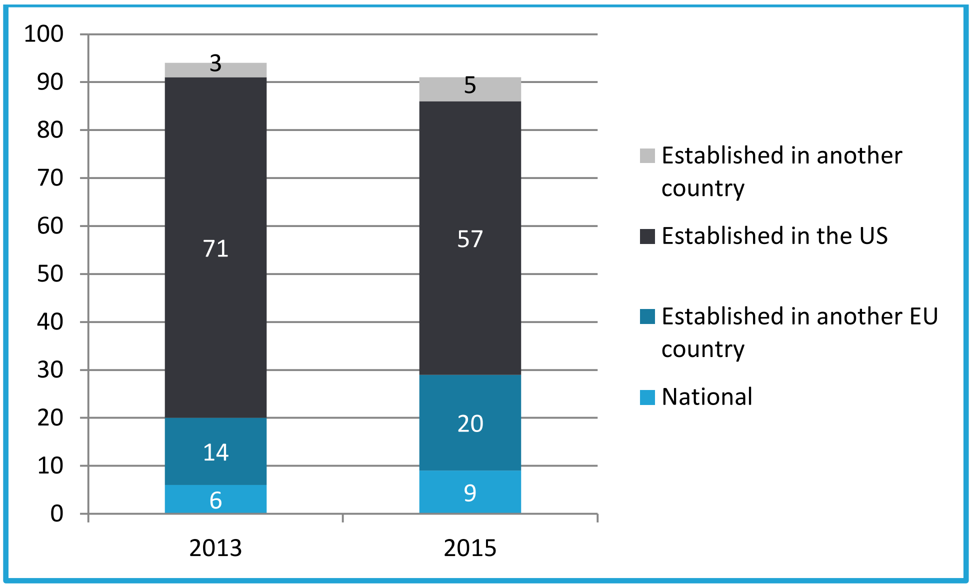
IE – Ireland

Figure 37: Number of linear audiovisual media services established in Ireland by genre (2009, 2015)



Source: European Audiovisual Observatory / MAVISE database

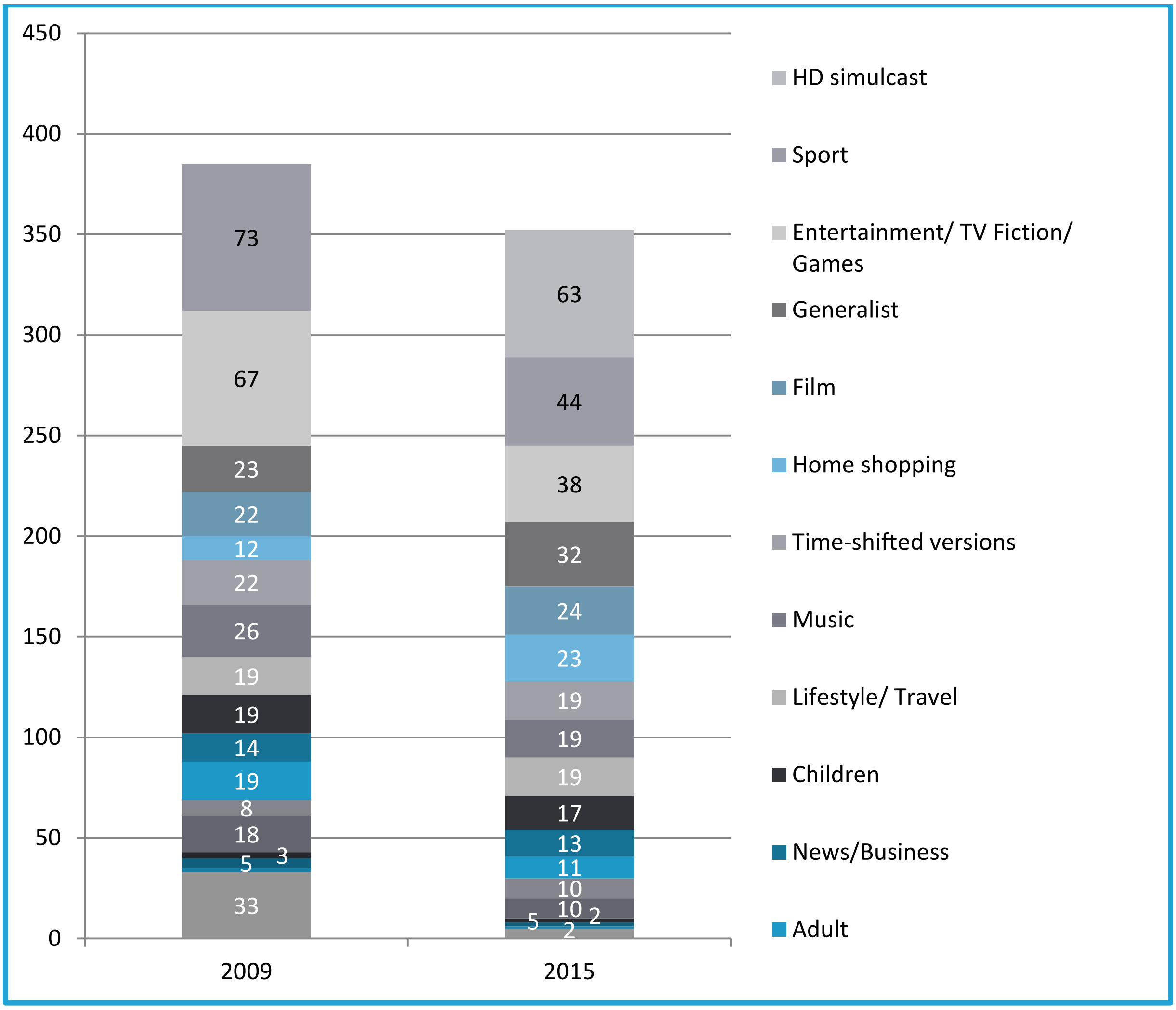
Figure 38: Number of video-on-demand services available in Ireland by country of establishment (2013, 2015)



Source: European Audiovisual Observatory / MAVISE database

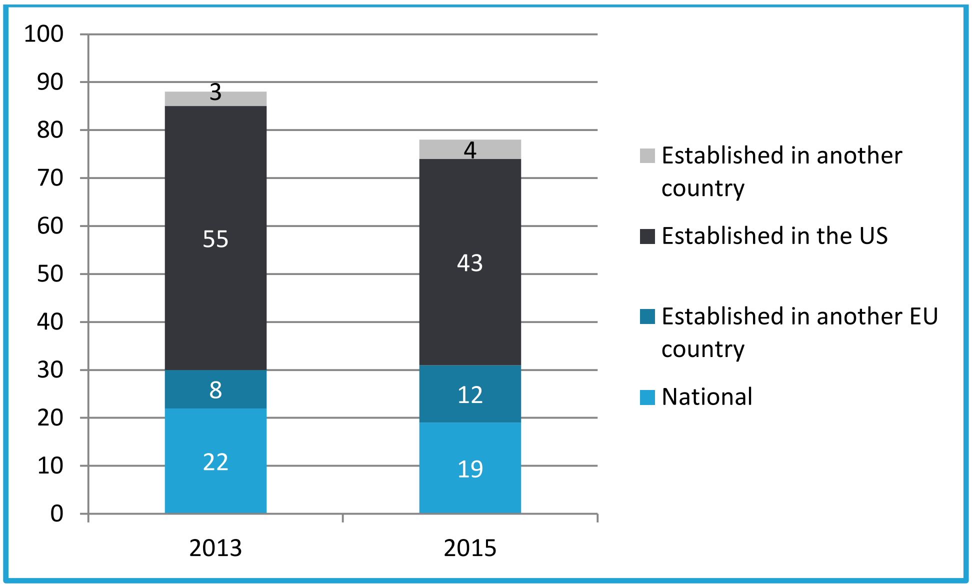
IT – Italy

Figure 39: Number of linear audiovisual media services established in Italy by genre (2009, 2015)



Source: European Audiovisual Observatory / MAVISE database

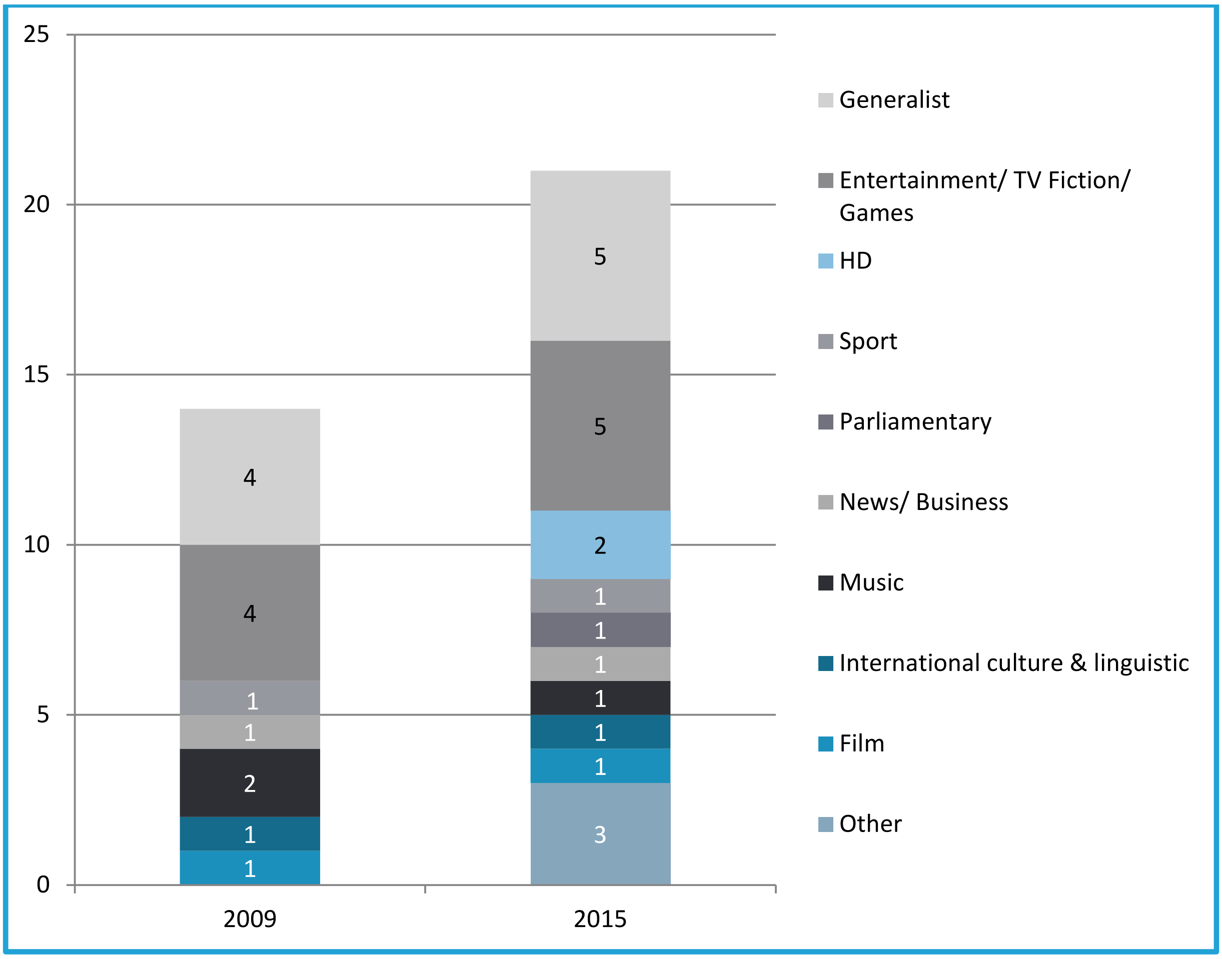
Figure 40: Number of video-on-demand services available in Italy by country of establishment (2013, 2015)



Source: European Audiovisual Observatory / MAVISE database

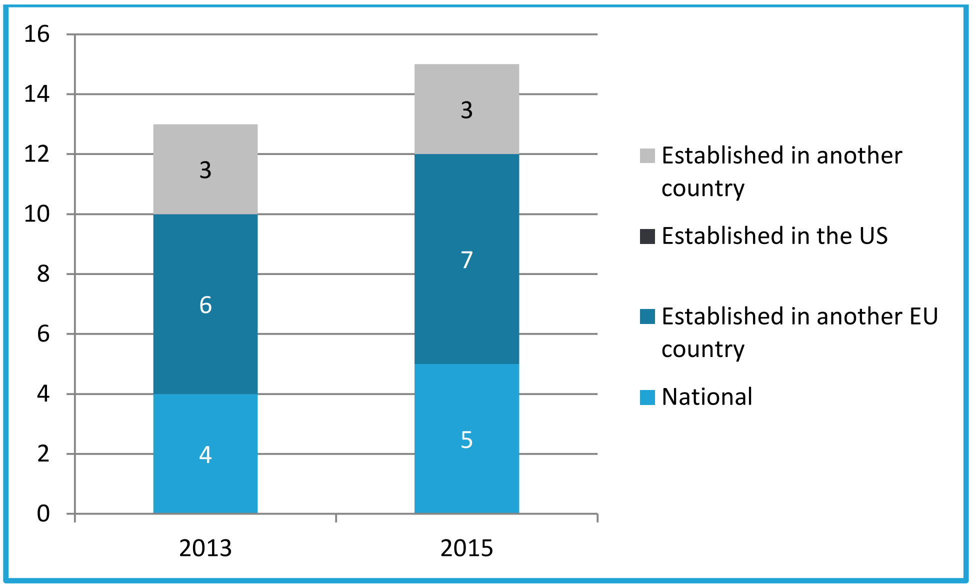
LT – Lithuania

Figure 41: Number of linear audiovisual media services established in Lithuania by genre (2009, 2015)



Source: European Audiovisual Observatory / MAVISE database

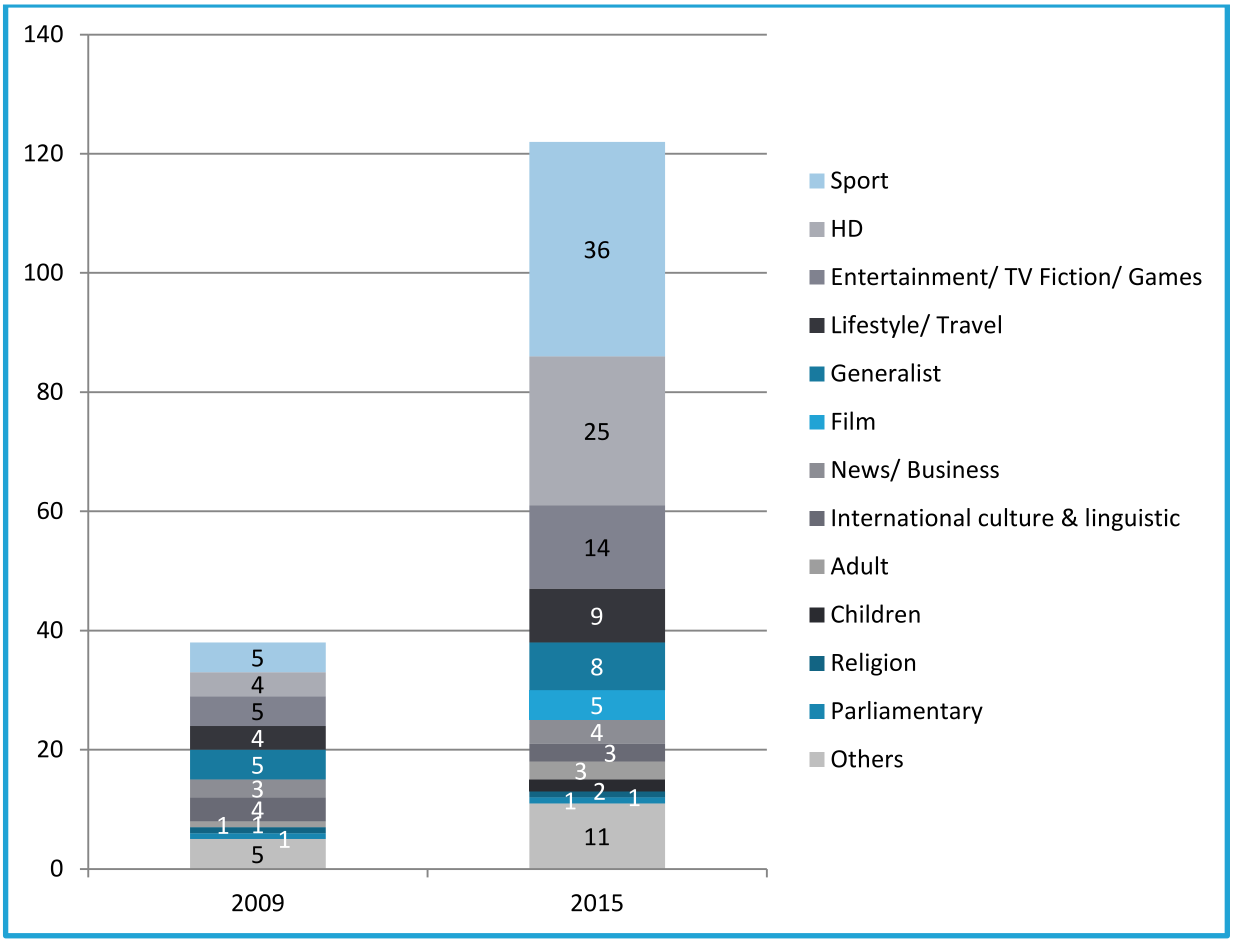
Figure 42: Number of video-on-demand services available in Lithuania by country of establishment (2013, 2015)



Source: European Audiovisual Observatory / MAVISE database

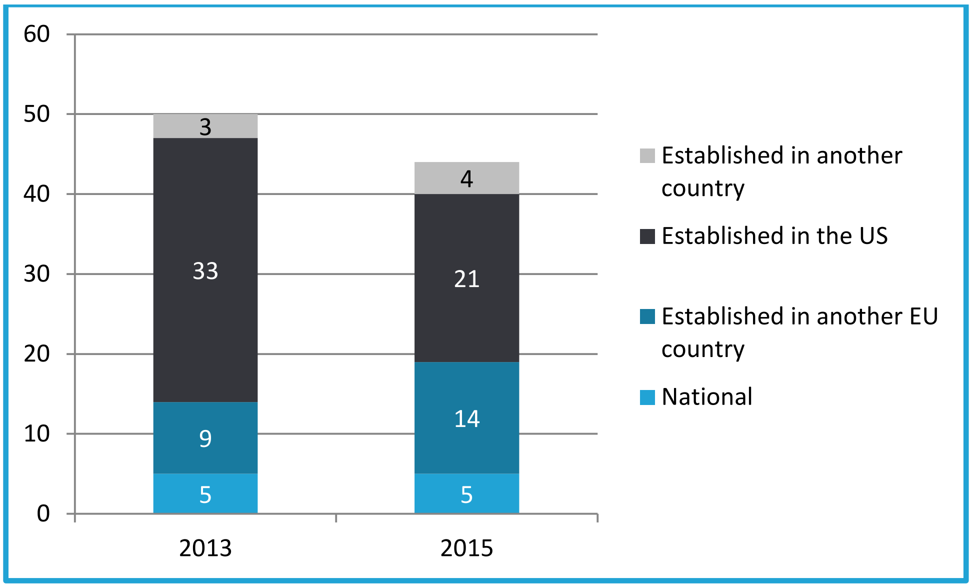
LU – Luxembourg

Figure 43: Number of linear audiovisual media services established in Luxembourg by genre (2009, 2015)



Source: European Audiovisual Observatory / MAVISE database

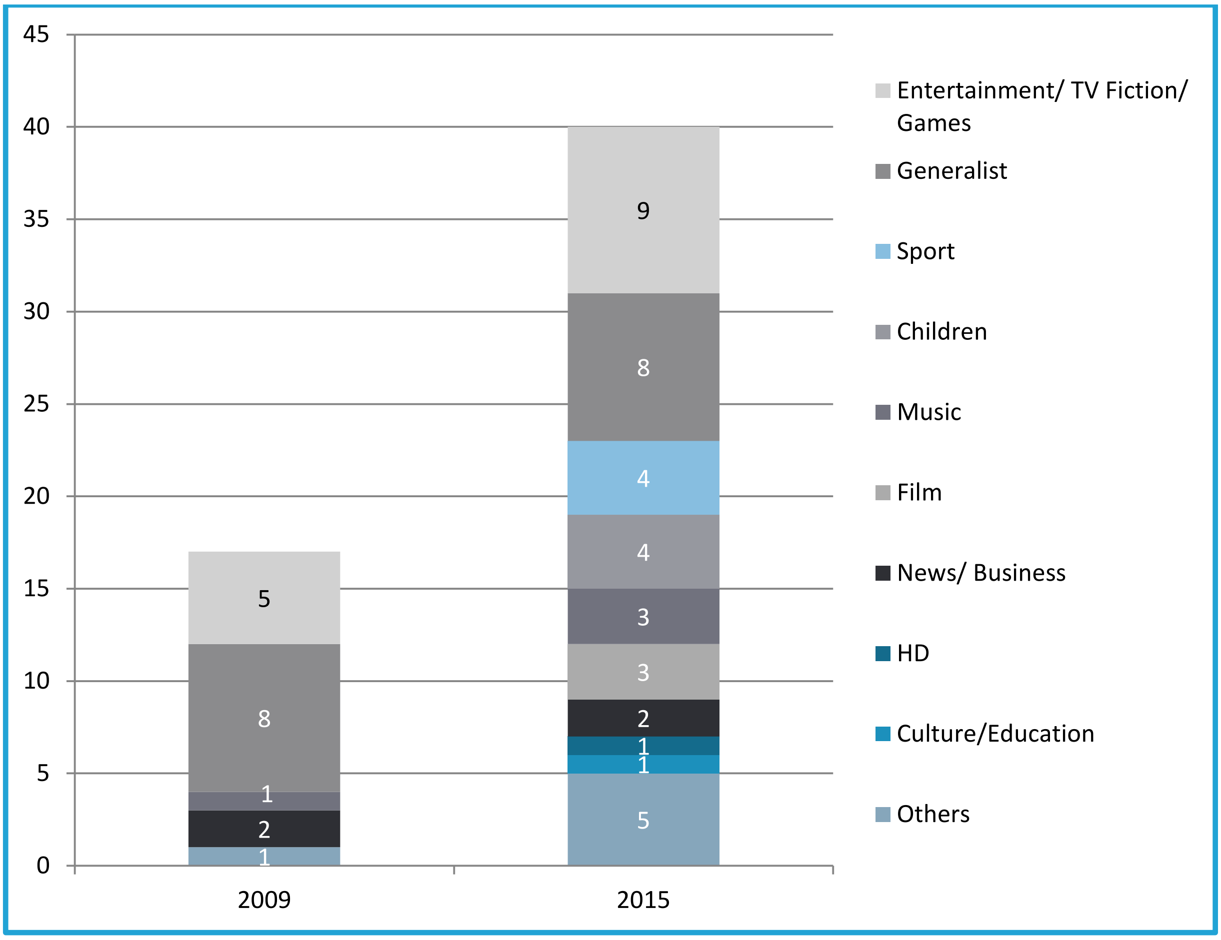
Figure 44: Number of video-on-demand services available in Luxembourg by country of establishment (2013, 2015)



Source: European Audiovisual Observatory / MAVISE database

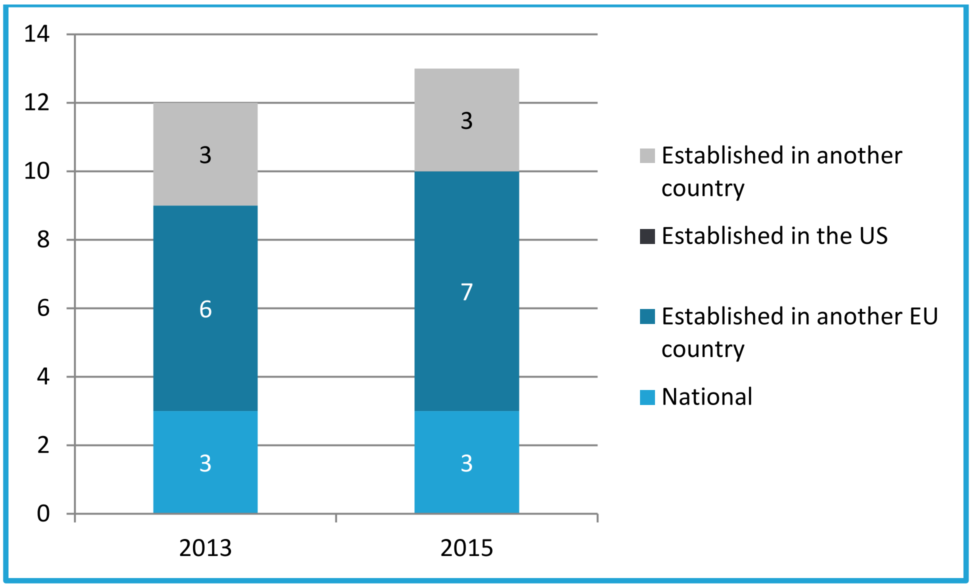
LV – Latvia

Figure 45: Number of linear audiovisual media services established in Latvia by genre (2009, 2015)



Source: European Audiovisual Observatory / MAVISE database

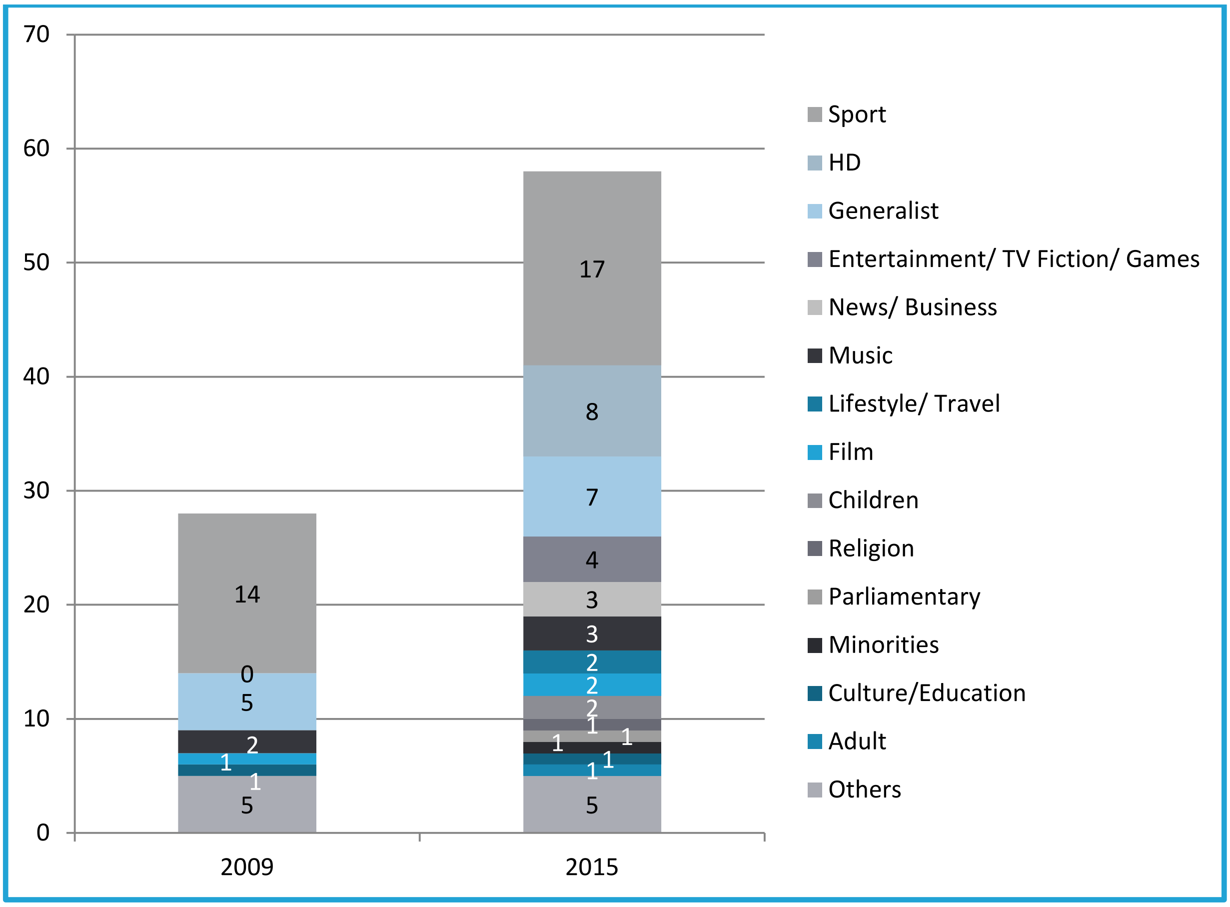
Figure 46: Number of video-on-demand services available in Latvia by country of establishment (2013, 2015)



Source: European Audiovisual Observatory / MAVISE database

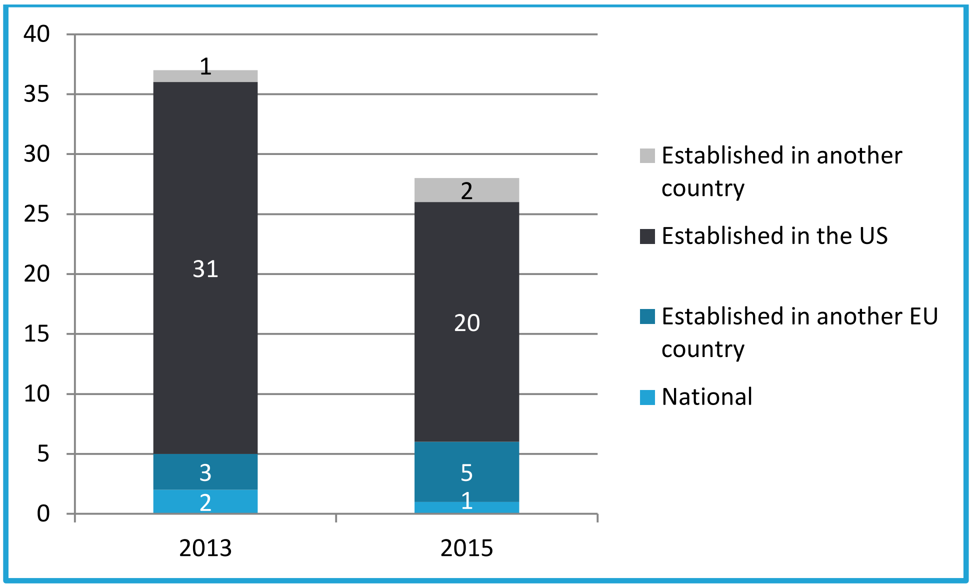
MT – Malta

Figure 47: Number of linear audiovisual media services established in Malta by genre (2009, 2015)



Source: European Audiovisual Observatory / MAVISE database

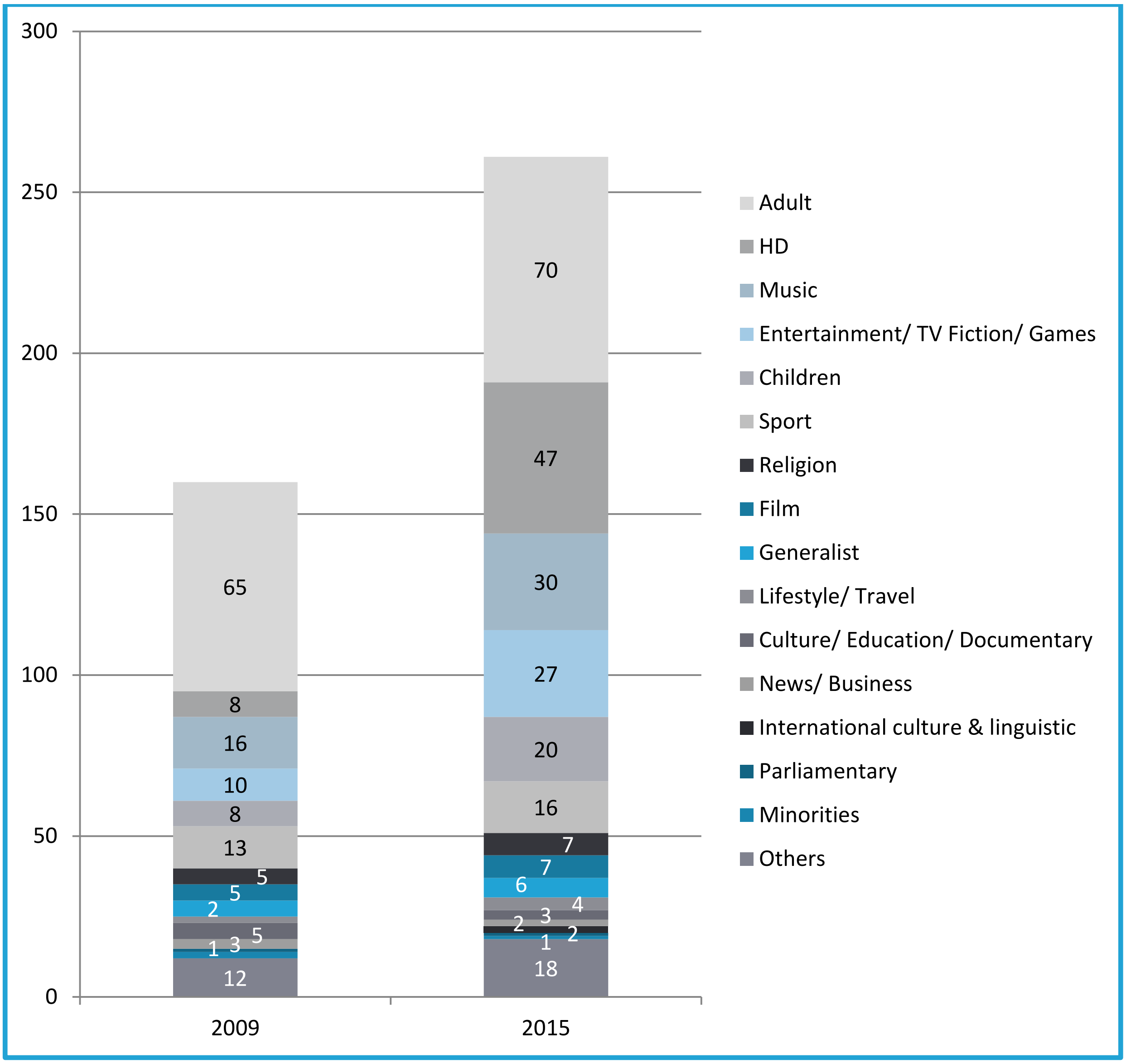
Figure 48: Number of video-on-demand services available in Malta by country of establishment (2013, 2015)



Source: European Audiovisual Observatory / MAVISE database

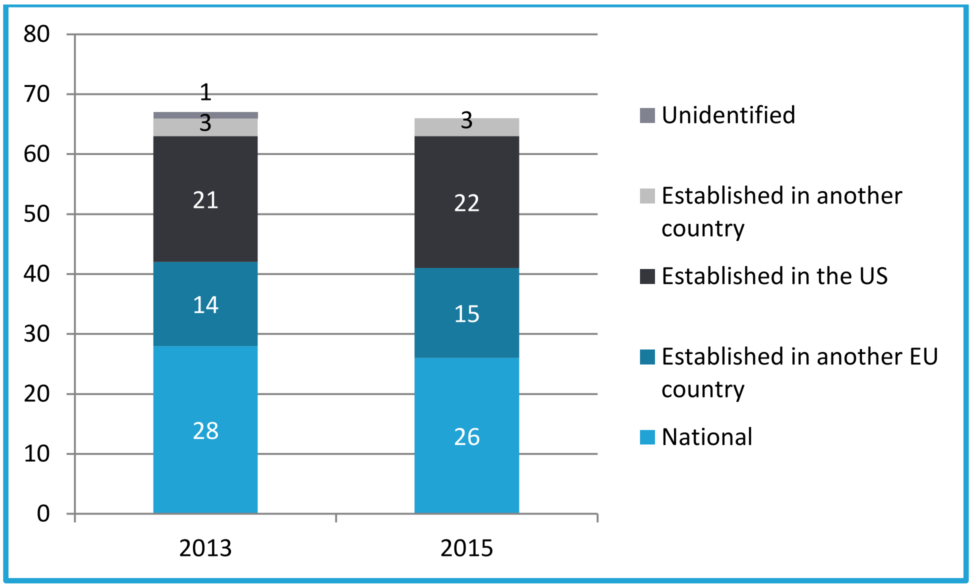
NL – Netherlands

Figure 49: Number of linear audiovisual media services established in the Netherlands by genre (2009, 2015)



Source: European Audiovisual Observatory / MAVISE database

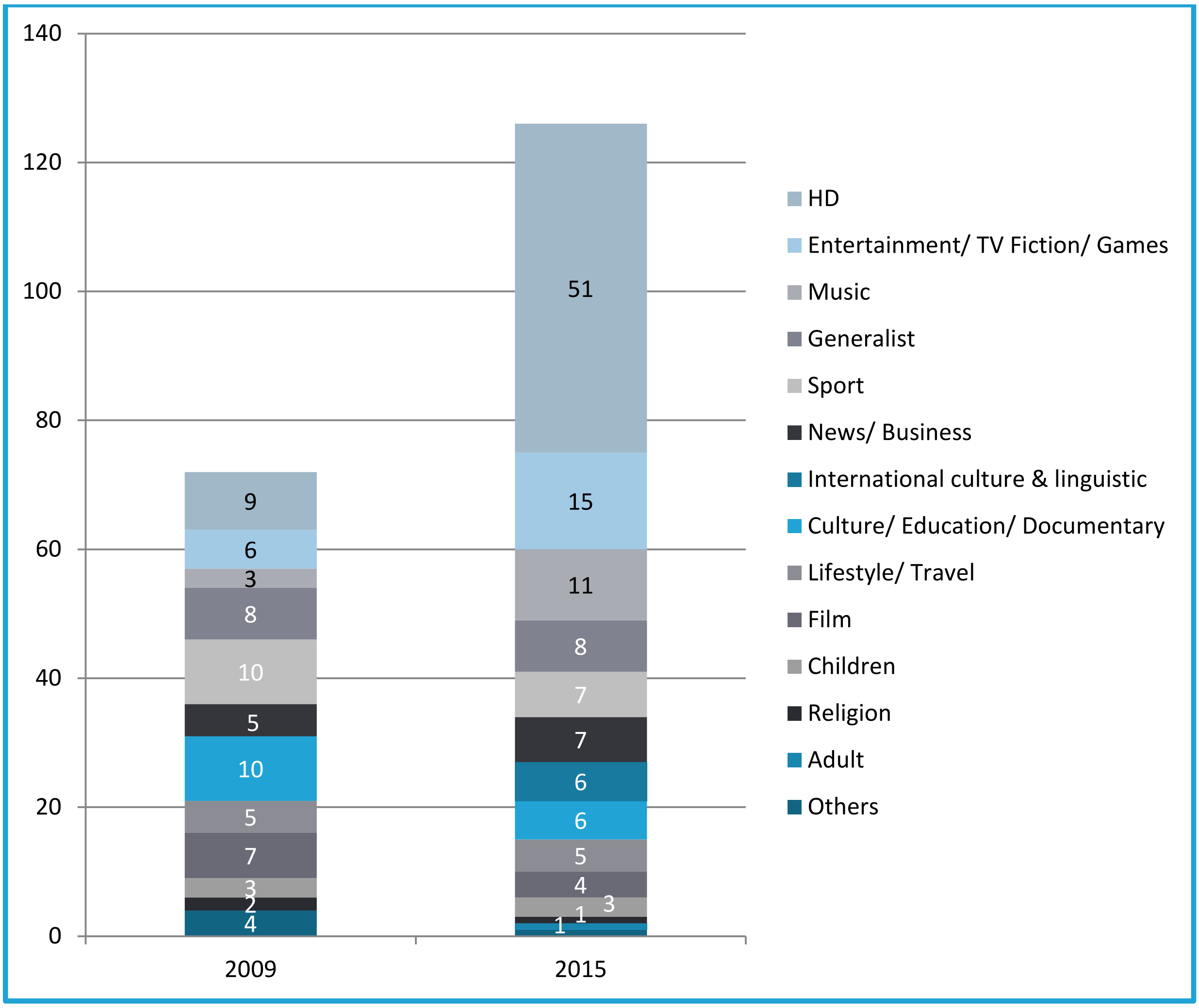
Figure 50: Number of video-on-demand services available in the Netherlands by country of establishment (2013, 2015)



Source: European Audiovisual Observatory / MAVISE database

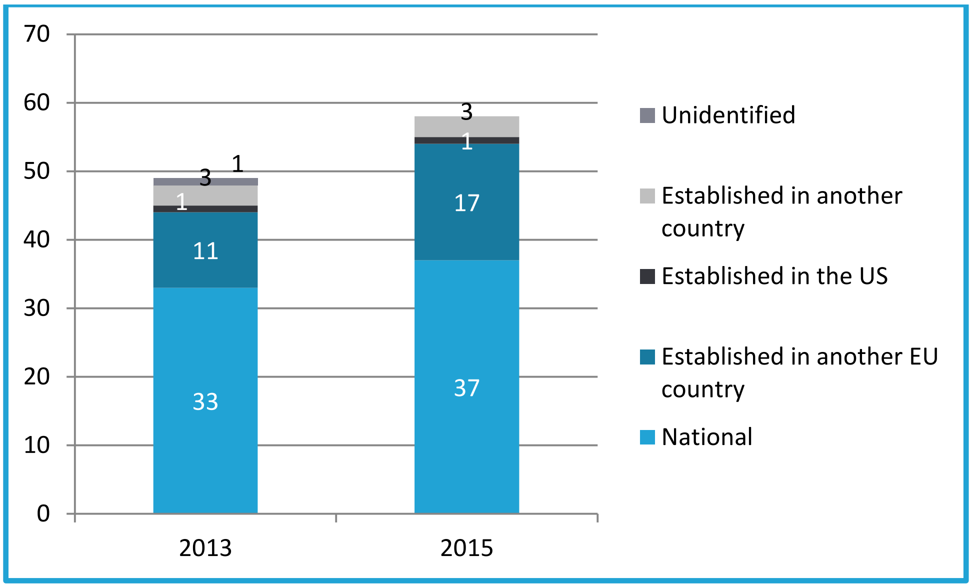
PL – Poland

Figure 51: Number of linear audiovisual media services established in Poland by genre (2009, 2015)



Source: European Audiovisual Observatory / MAVISE database

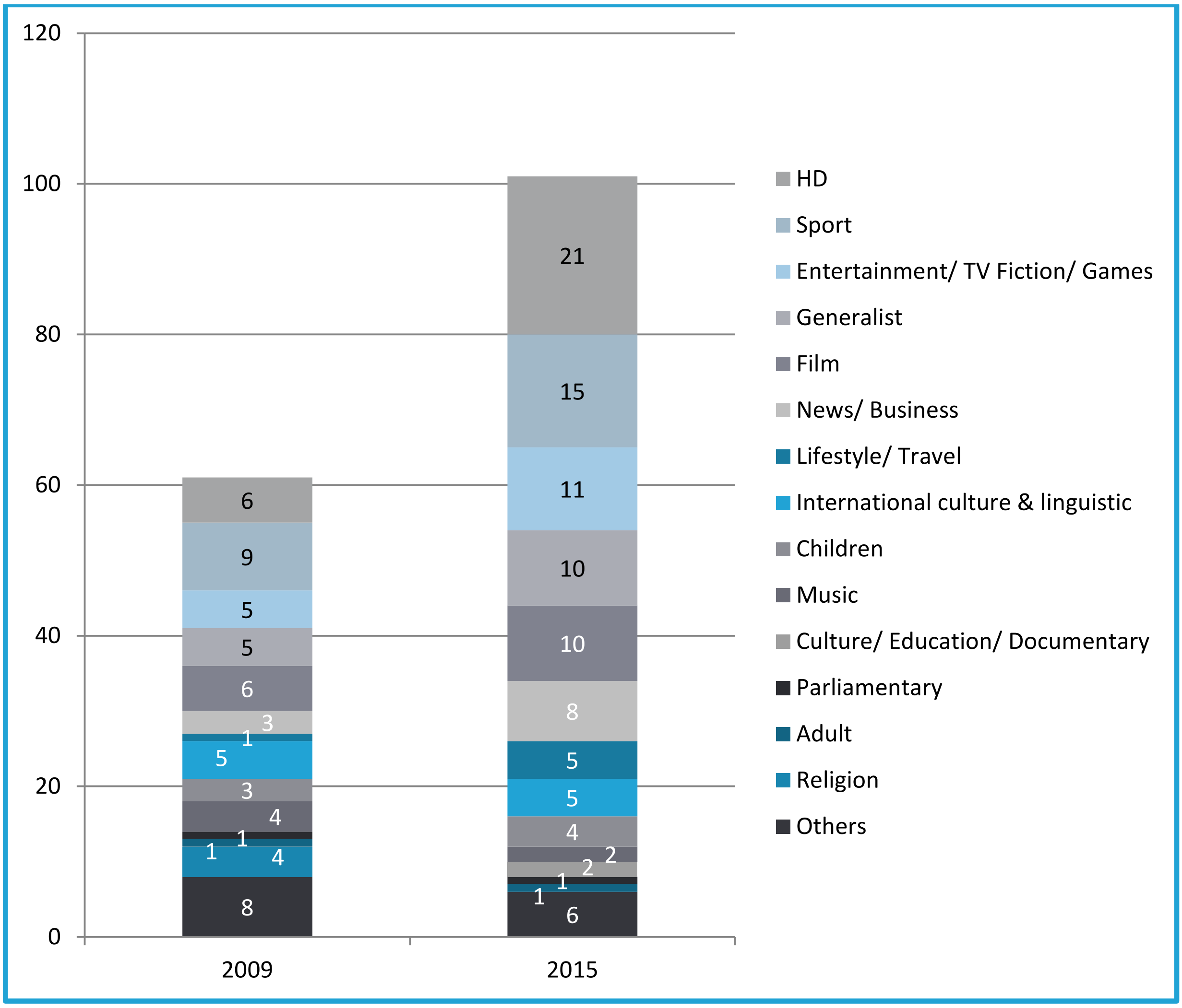
Figure 52: Number of video-on-demand services available in Poland by country of establishment (2013, 2015)



Source: European Audiovisual Observatory / MAVISE database

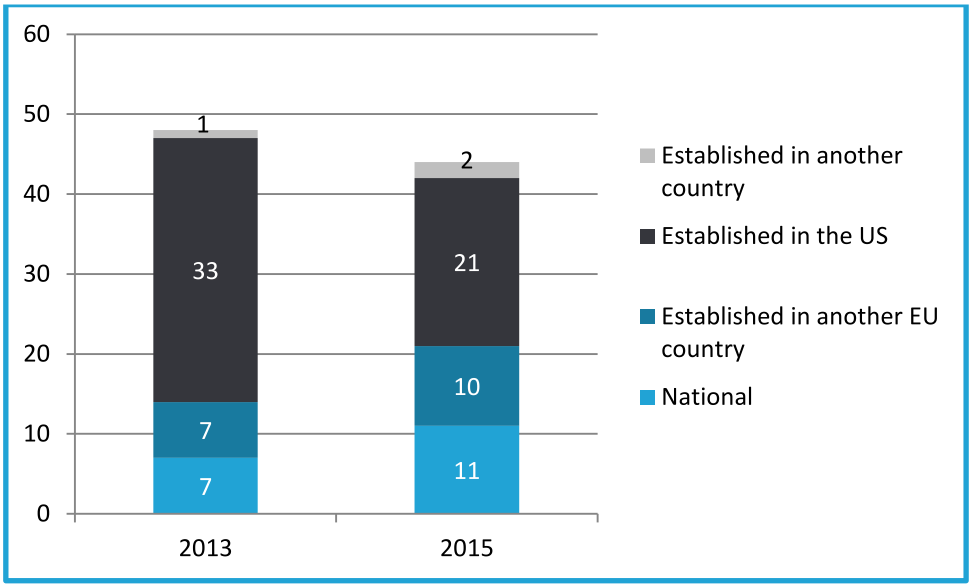
PT – Portugal

Figure 53: Number of linear audiovisual media services established in Portugal by genre (2009, 2015)



Source: European Audiovisual Observatory / MAVISE database

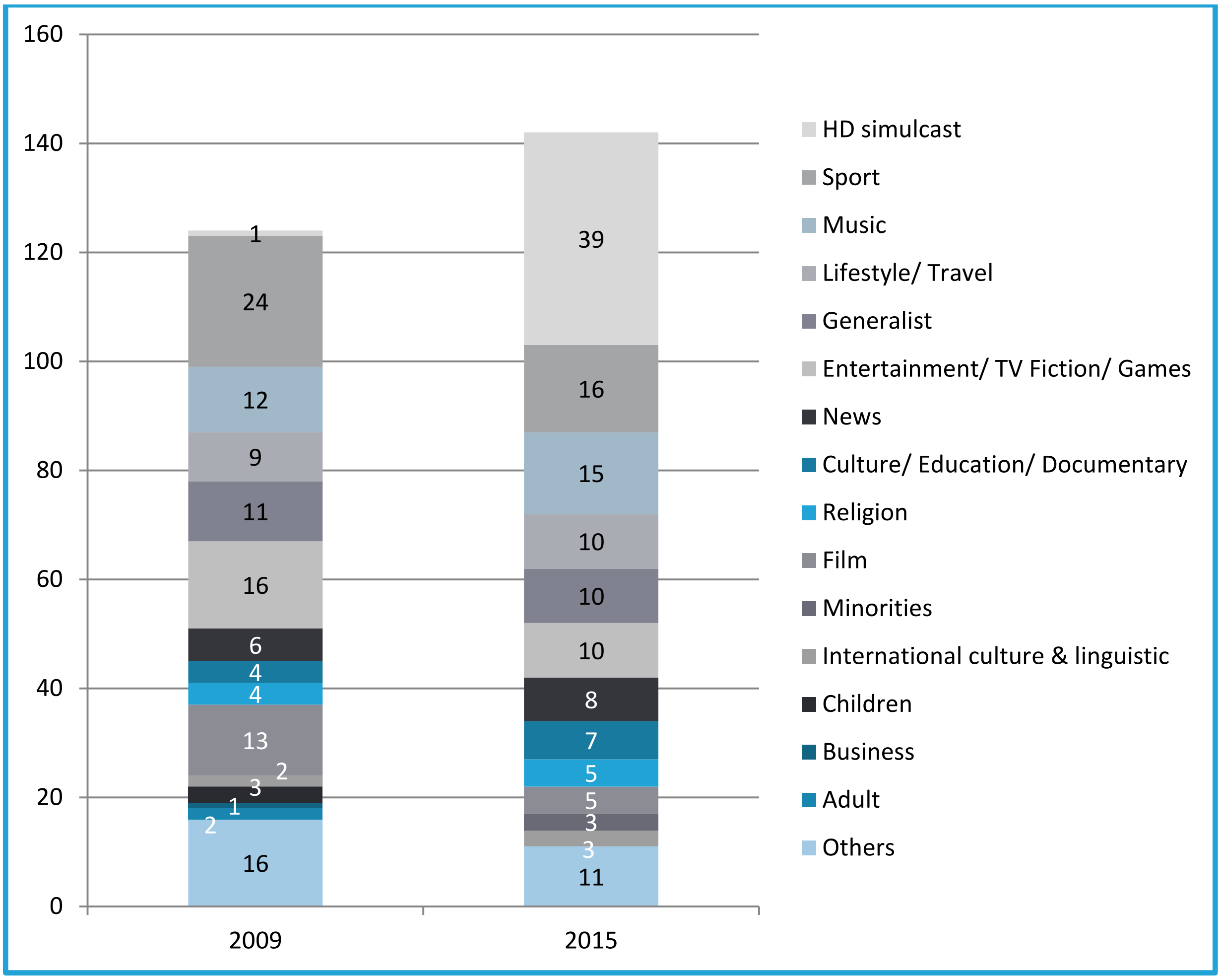
Figure 54: Number of video-on-demand services available in Portugal by country of establishment (2013, 2015)



Source: European Audiovisual Observatory / MAVISE database

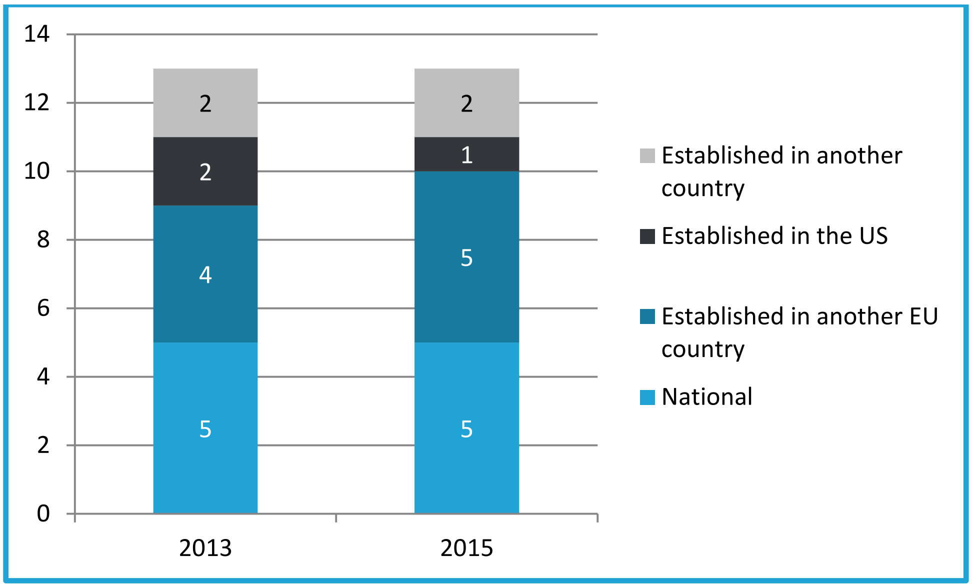
RO – Romania

Figure 55: Number of linear audiovisual media services established in Romania by genre (2009, 2015)



Source: European Audiovisual Observatory / MAVISE database

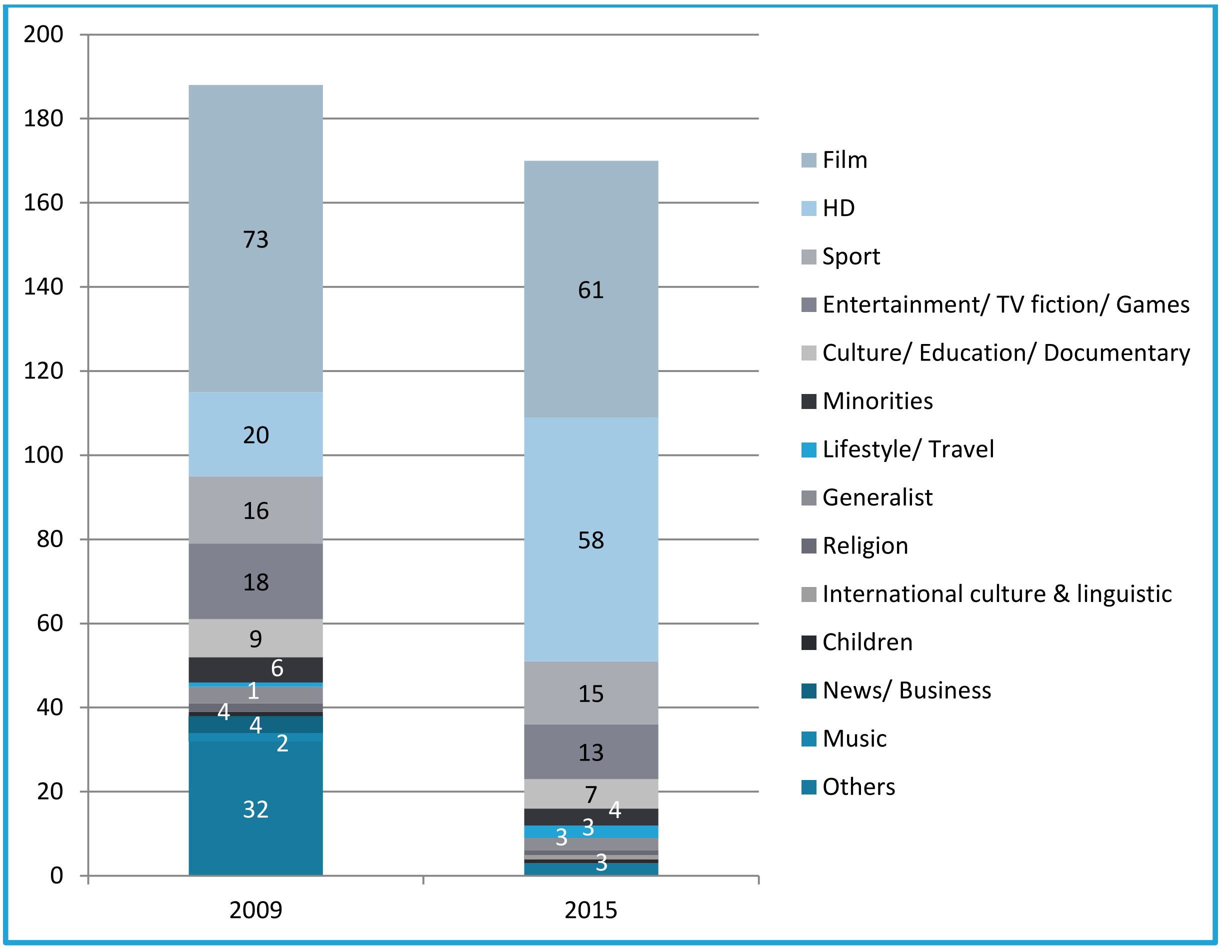
Figure 56: Number of video-on-demand services available in Romania by country of establishment (2013, 2015)



Source: European Audiovisual Observatory / MAVISE database

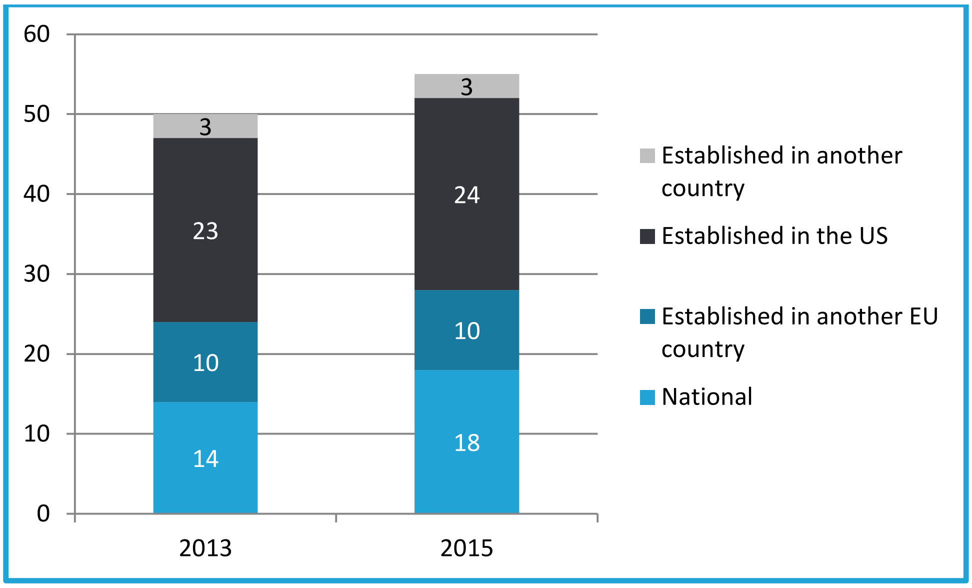
SE – Sweden

Figure 57: Number of linear audiovisual media services established in Sweden by genre (2009, 2015)



Source: European Audiovisual Observatory / MAVISE database

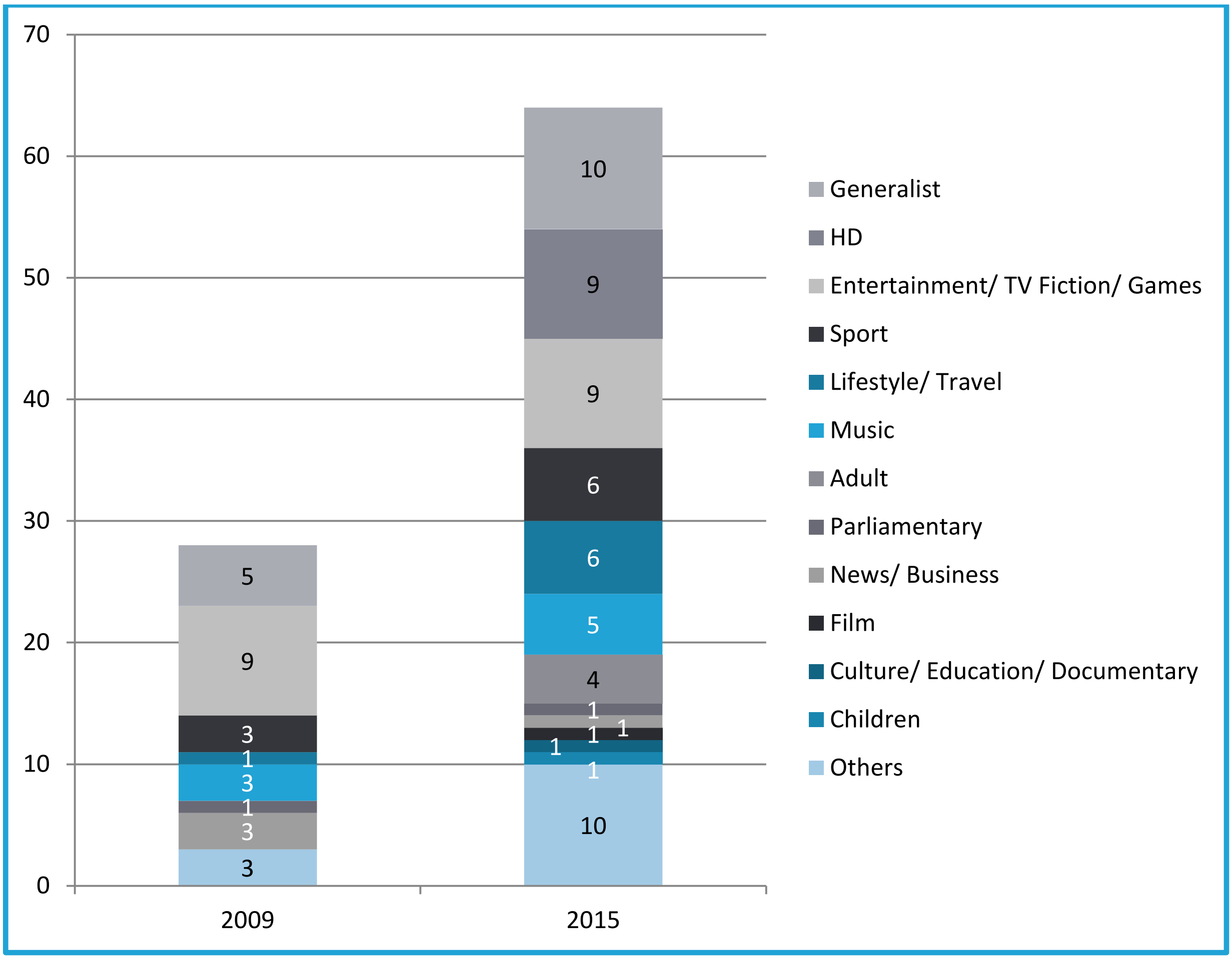
Figure 58: Number of video-on-demand services available in Sweden by country of establishment (2013, 2015)



Source: European Audiovisual Observatory / MAVISE database

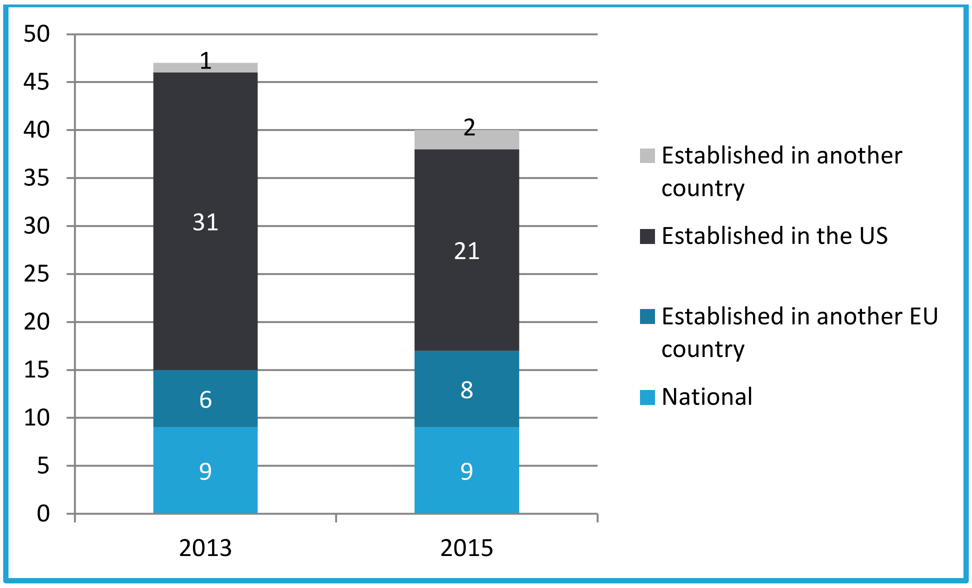
SI – Slovenia

Figure 59: Number of linear audiovisual media services established in Slovenia by genre (2009, 2015)



Source: European Audiovisual Observatory / MAVISE database

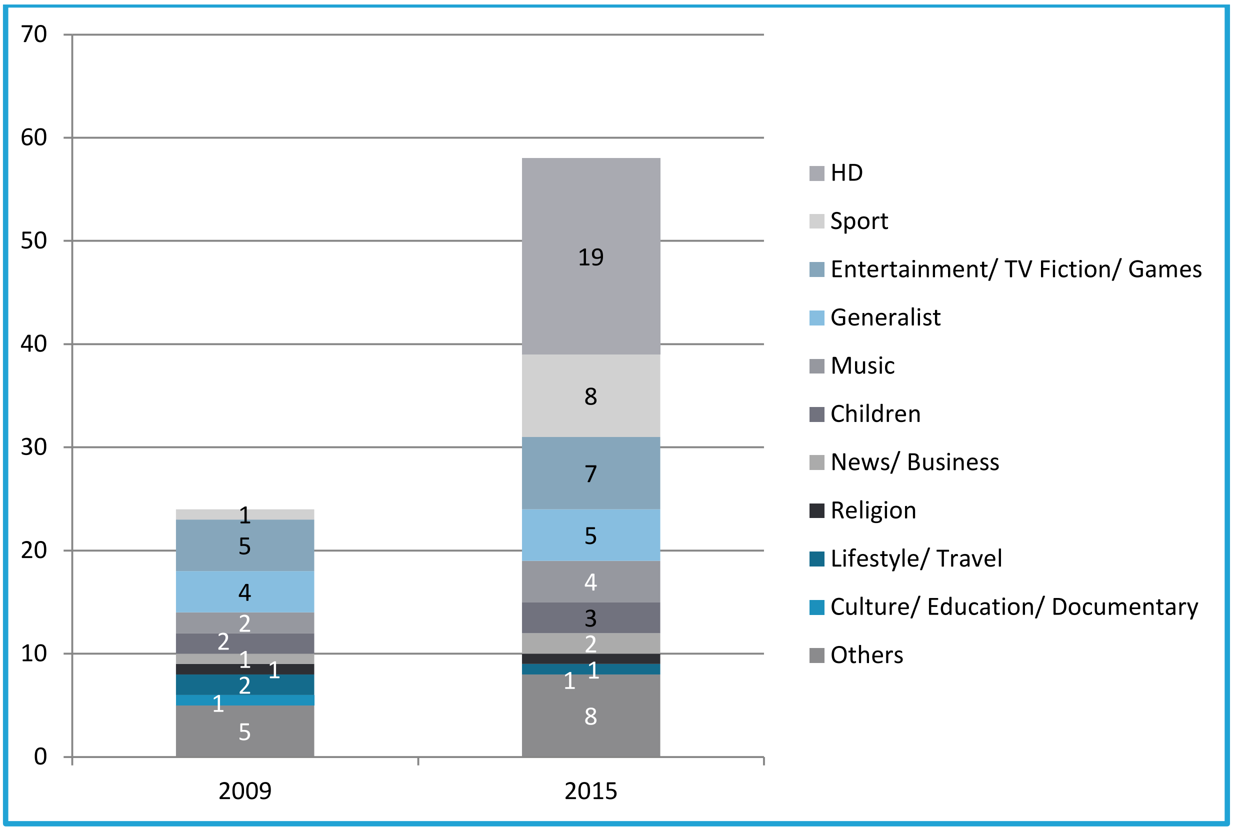
Figure 60: Number of video-on-demand services available in Slovenia by country of establishment (2013, 2015)



Source: European Audiovisual Observatory / MAVISE database

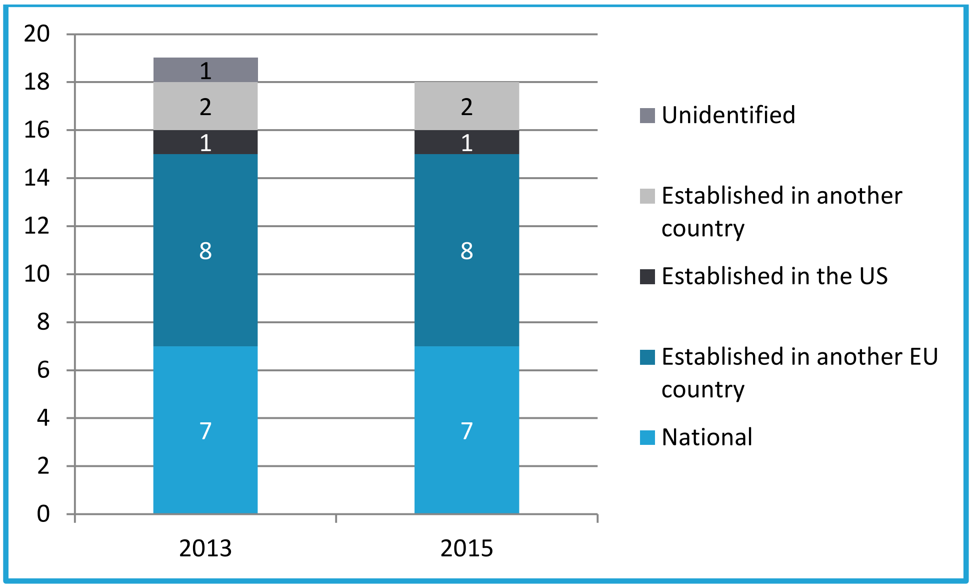
SK – Slovak Republic

Figure 61: Number of linear audiovisual media services established in the Slovak Republic by genre (2009, 2015)



Source: European Audiovisual Observatory / MAVISE database

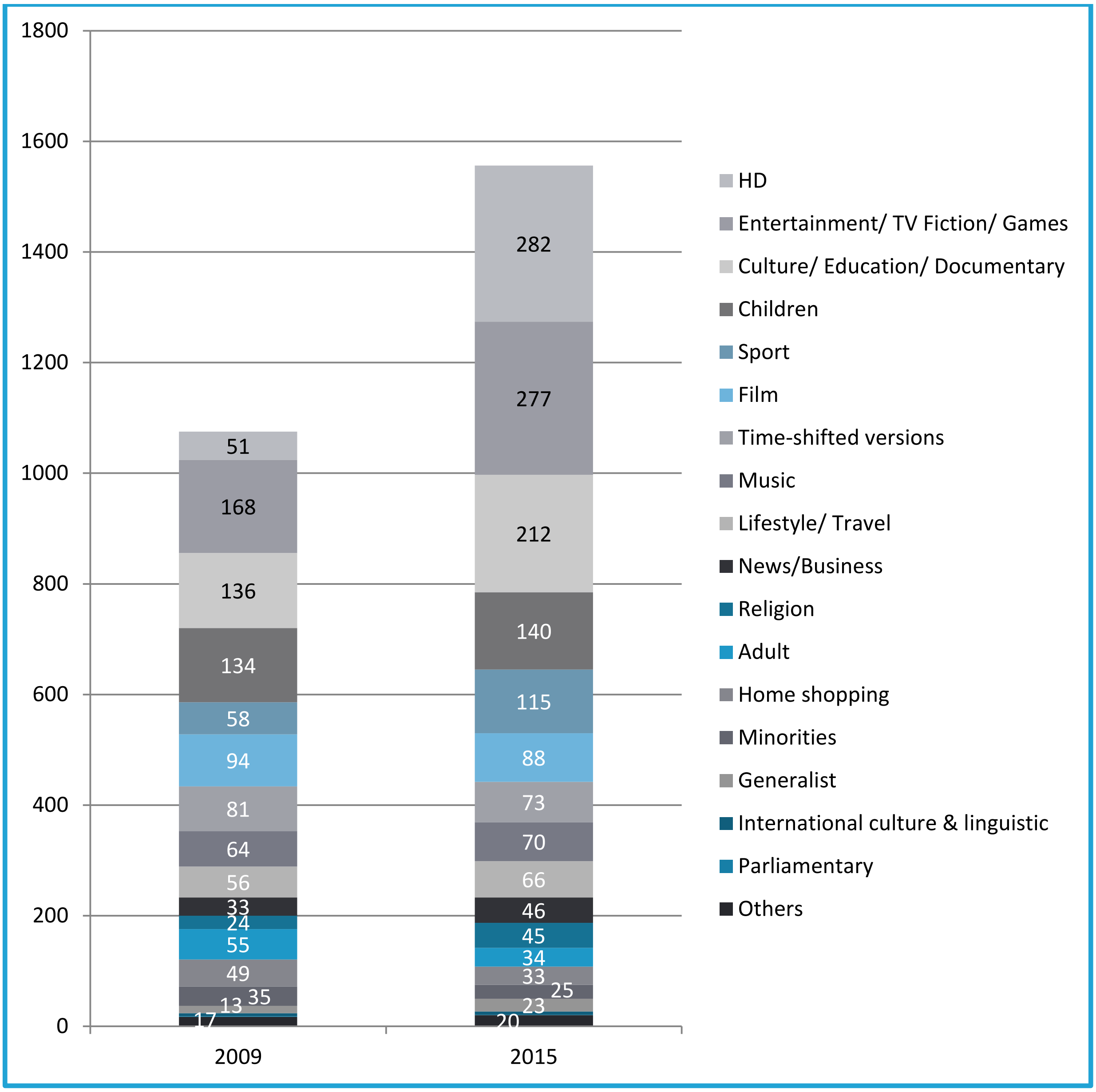
Figure 62: Number of video-on-demand services available in the Slovak Republic by country of establishment (2013, 2015)



Source: European Audiovisual Observatory / MAVISE database

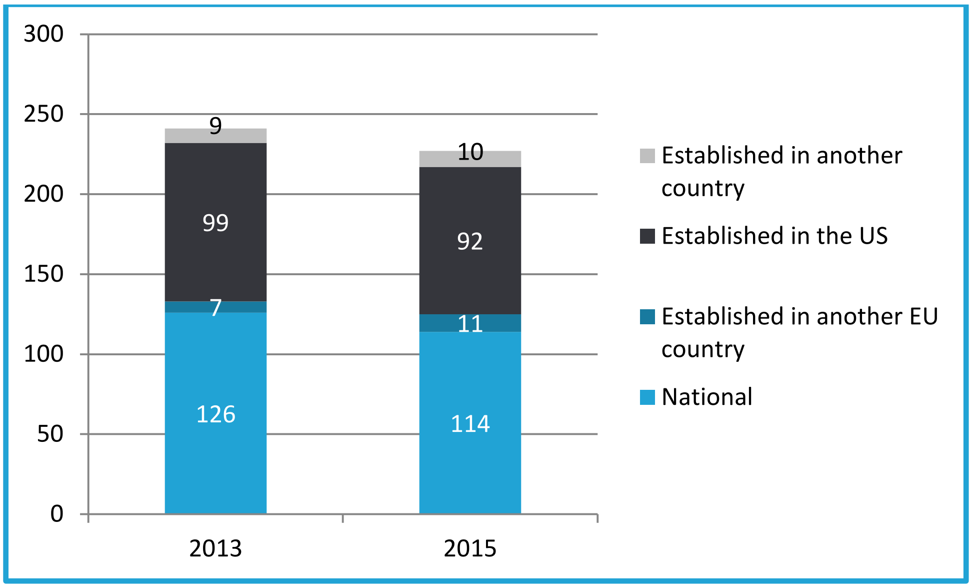
UK – United Kingdom

Figure 63: Number of linear audiovisual media services established in the United Kingdom by genre (2009, 2015)



Source: European Audiovisual Observatory / MAVISE database

Figure 64: Number of video-on-demand services available in the United Kingdom by country of establishment (2013, 2015)



Source: European Audiovisual Observatory / MAVISE database