Audiovisual media services in Europe - 2025 data

Jean-Augustin Tran

June 2026

A publication of the European Audiovisual Observatory

Observatoire européen de l'audiovisuel
European Audiovisual Observatory
Europäische Audiovisuelle Informationsstelle

COUNCIL OF EUROPE
CONSEIL DE L'EUROPE

Table of contents

Introduction.. 3
Scope and methodology.. 4

Executive summary:
- I. The big picture... 6
- II. Main players.. 10

Part I. The big picture – AV services and VSP.................................... 11
The big picture – TV channels.. 14
The big picture – VOD services and VSP.. 39

Part II. Main players.. 51
Main players – Top 20.. 52
Main players – Case studies... 61

European Audiovisual Observatory

Introduction

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

To understand the European audiovisual sector, this publication offers insights from two perspectives. The first provides the **big picture**, by focusing on the supply of television channels, VOD services and video-sharing platforms available in and originating from the European markets. Specifically, this includes information on local services, private and public services, US owned services and platforms, channels on DTT networks, and services targeting multiple markets.

The second perspective looks at the **main players** operating in Europe with a specific focus on the top 20 TV and VOD groups and their presence in the various European markets. Particular attention is paid to the weight of US players in the European audiovisual sector, their main brands and operating markets. Further, the report includes three case studies shedding some light onto the different strategies of main players with regards to where they are based and which markets they serve.

European Audiovisual Observatory

Scope and methodology

MAVISE database: This publication is based on the analysis of December 2025 figures from MAVISE, a database on audiovisual media services, VOD platforms and their jurisdiction in Europe. The MAVISE database, managed by the European Audiovisual Observatory, is supported by the CREATIVE EUROPE programme of the European Union. For more information, please visit http://mavise.obs.coe.int/

European MAVISE countries of availability: Based on MAVISE data, this report covers EU27, Albania, Armenia, Bosnia and Herzegovina, Georgia, Iceland, Liechtenstein, Montenegro, North Macedonia, the Republic of Moldova, Norway, Serbia, Switzerland, Türkiye, the United Kingdom and Ukraine (including microstates Andorra, Gibraltar, Greenland, Monaco, San Marino and Vatican City).

Audiovisual (AV) media services and video-sharing platforms (VSP) available in Europe: Figures for audiovisual media services and video-sharing platforms available in Europe are based on MAVISE data comprising a) all linear and non-linear audiovisual services and b) video-sharing platforms included in the registries of the audiovisual regulatory authorities in the territories covered by the MAVISE database. The MAVISE database is the result of a collaboration with the European Platform of Regulatory Authorities (EPRA) and its network of European audiovisual regulatory authorities. Please note that the registration of VSP is still ongoing. The figures also include other audiovisual services and VSP relevant from a market perspective.

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

Audiovisual media services and VSP targeting multi-national markets: AV media services and VSP targeting at least one specific market outside their country of establishment covered by MAVISE. Include services and platforms established in one country and exclusively targeting another foreign market.

European Audiovisual Observatory

Scope and methodology

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

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

Terrestrial television services: In case of multiple types of registrations for the exact same service, MAVISE always uses the DTT registration information if available. This includes a) TV channels with a DTT registration and b) any other TV channel on national DTT networks.

Parent company, country and region: a) The highest company in the ownership tree of a service, b) the country of establishment of the parent company, and c) the geographical region of the country in which the parent company is established.

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

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

European Audiovisual Observatory

1. Number of services

- The European audiovisual services sector continues to grow. The number of audiovisual media services and video-sharing platforms available increased in Europe to 13 570 growing by 5% between Dec. 2024 and Dec. 2025. The growth is mainly driven by VOD services with an increase of 15% due to the growing number of registrations of influencers, VSP channels and other accounts on social medias as VOD services. The growth of number of TV channels is comparable to that seen last year (1%). The growth of TV channels is driven by FAST channels and online linear channels.

- TV channels still represent the majority of media services in number, but their share is decreasing from 74% in 2024 to 71% in 2025. One of the reasons why TV is overrepresented is that 39% of it is made up of local and regional channels.

- Most audiovisual content offers thematic programmes (58%), an increase compared to last year (55%) thanks to the growth of channels and VOD services providing entertainment content. The thematic content of both VOD services and TV programming appears to be fragmented. The greater part of the TV offering caters to special interests in the form of thematic channels (56%). Only 14% of VOD services and video-sharing platforms in Europe offer generalist programming.

2. Public vs private ownership

- Media services and VSP are mostly privately owned: 91% of the total is owned by private companies. Compared to TV channels, VOD and VSP services are more likely to be privately owned (89% vs 96%).

- With regards to ownership, the European TV market is divided into a public sector with mainly generalist programming available on DTT networks and a private sector which has expanded into thematic cable, IPTV, and satellite channels. But with 10% of cable, IPTV and satellite services, public groups offer quite a number of thematic channels. Almost all VOD services and VSP are privately owned (96%). However, public service media have entered the VOD market as well, gradually expanding their catch-up services into full-fledge VOD services. Publicly owned VOD services also provide thematic programming such as film archives, cultural and educational services, platforms for children and entertainment services. The top 50 groups are also more private in VOD, with 98% of companies being private, compared to 88% of the top 50 in TV.

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

European
Audiovisual
Observatory

3. Footprint

- The registration under the AVMSD appears remarkably homogenous. Almost all TV channels (97%) and VOD services (99,8%) are granted by the country where the audiovisual service is established (based on Article 2(3)(a)). This homogeneity is also true for video-sharing platforms, 92% are registered under Article 2 (1).
- TV and VOD services targeting Europe from outside make up just 2%. Conversely, there are very few exports out of Europe. From all audiovisual services established and available in Europe, 77% of TV and 89% of VOD serve national markets, meaning that the country of establishment and operational scope of a service provider are identical.
- Meanwhile, the European audiovisual sector is characterised in part by a certain degree of intra-European supply movements. The share of services available in Europe with a multi-national or pan-European coverage is a combined 24% for television and 11% for VOD services.
- The programming content of multi-national[1] TV channels and VOD services is almost entirely thematic. The main establishment hubs for multi-national TV channels are the Netherlands, Spain, Sweden and the United Kingdom. Most multi-national TV channels are privately owned.
- Fewer in numbers but omnipresent, around 7% of all linear services available in Europe are pay or free pan-European channels. Public service media are well represented among free pan-European TV channels (22%). While most free satellite channels are news, generalist and religious channels, pan-European satellite channels for pay tend to be services with adult, entertainment, music, lifestyle and sport content.

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

4. US groups in Europe

- Overall, US groups have a substantial influence on the European audiovisual sector, with significant portfolios and market presence compared to their European counterparts. One in four (26%) of all private TV channels (excluding local TV) are US-owned and less than one in ten (7%) of all VOD services in Europe belong to a US company. US TV channel portfolios are significantly larger than European ones, with 69% of channels in the top 10 TV groups owned by five US companies. It is due to the dissemination of a higher number of localised versions per one specific network, as opposed to the European broadcaster portfolios.

- A comparison of the top 50 TV and VOD players in terms of the number of services shows striking differences. European companies are better represented in VOD, with 80% of VOD services cumulated by the top 50 VOD groups, but only 50% of TV channels. It highlights the impact of the different registration practices between TV and VOD services. For the latter, the multiple specific registrations per service are rather the exception. It also shows the diversity and volume of European VOD offerings with a variety of national players and niche topics, but it cannot offset the concentration created by the US market leaders.

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

- Compared to 2024, the 20 biggest players in the media sector remain remarkably stable in terms of companies and market presence. Almost all of these companies were already in the top in the previous edition.

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

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

- With regards to their establishment hubs, pan-European players employ different strategies. Netflix, for example, uses a centralised strategy with one main country of establishment from where it targets the European markets. A multi-country strategy is used by French Vivendi, where typically a small number of countries serve as a basis to target various national markets with its brands Canal+ and Filmbox+. Warner Bros. Discovery, by contrast, applies a decentralised strategy where a larger number of establishment hubs serve the European markets to disseminate the Discovery, Eurosport and MAX brands.

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

European Audiovisual Observatory

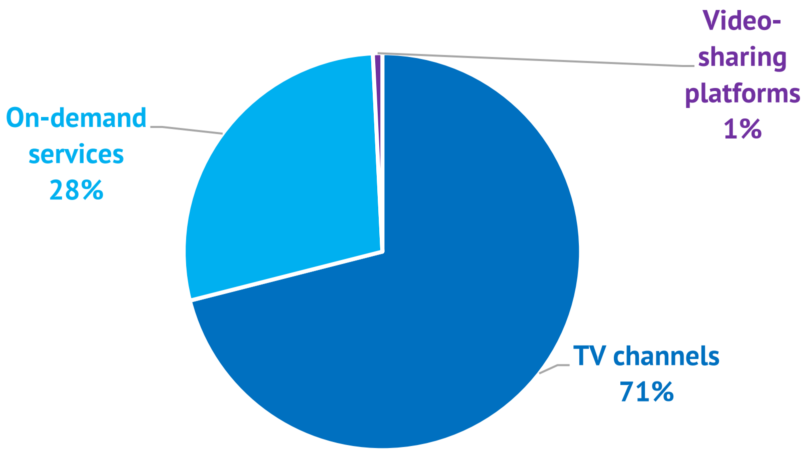
Part I. The big picture – AV media services and VSP

The big picture – Audiovisual media services and VSP

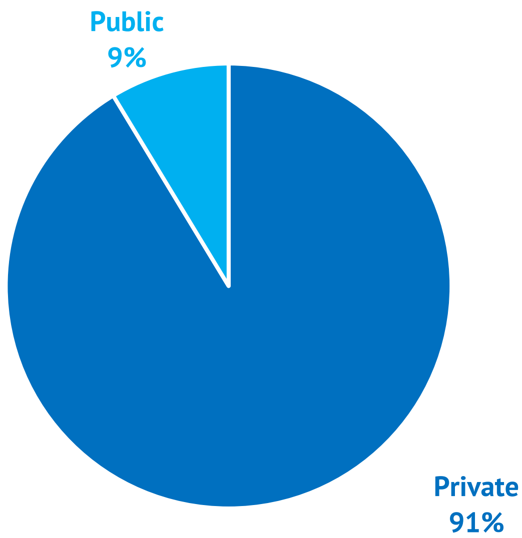
*Overall, there are 13 570 audiovisual media services and VSP available in wider Europe (Dec. 2025).**

- **More than one in four services in Europe is an VOD service or a video-sharing platform.**
- **Most audiovisual media services are privately owned, with 9% being publicly owned.**

Type of audiovisual media services and VSP available in Europe | Dec. 2025 - In number of services and %



Ownership of audiovisual media services and VSP available in Europe | Dec. 2025 - In number of services and %



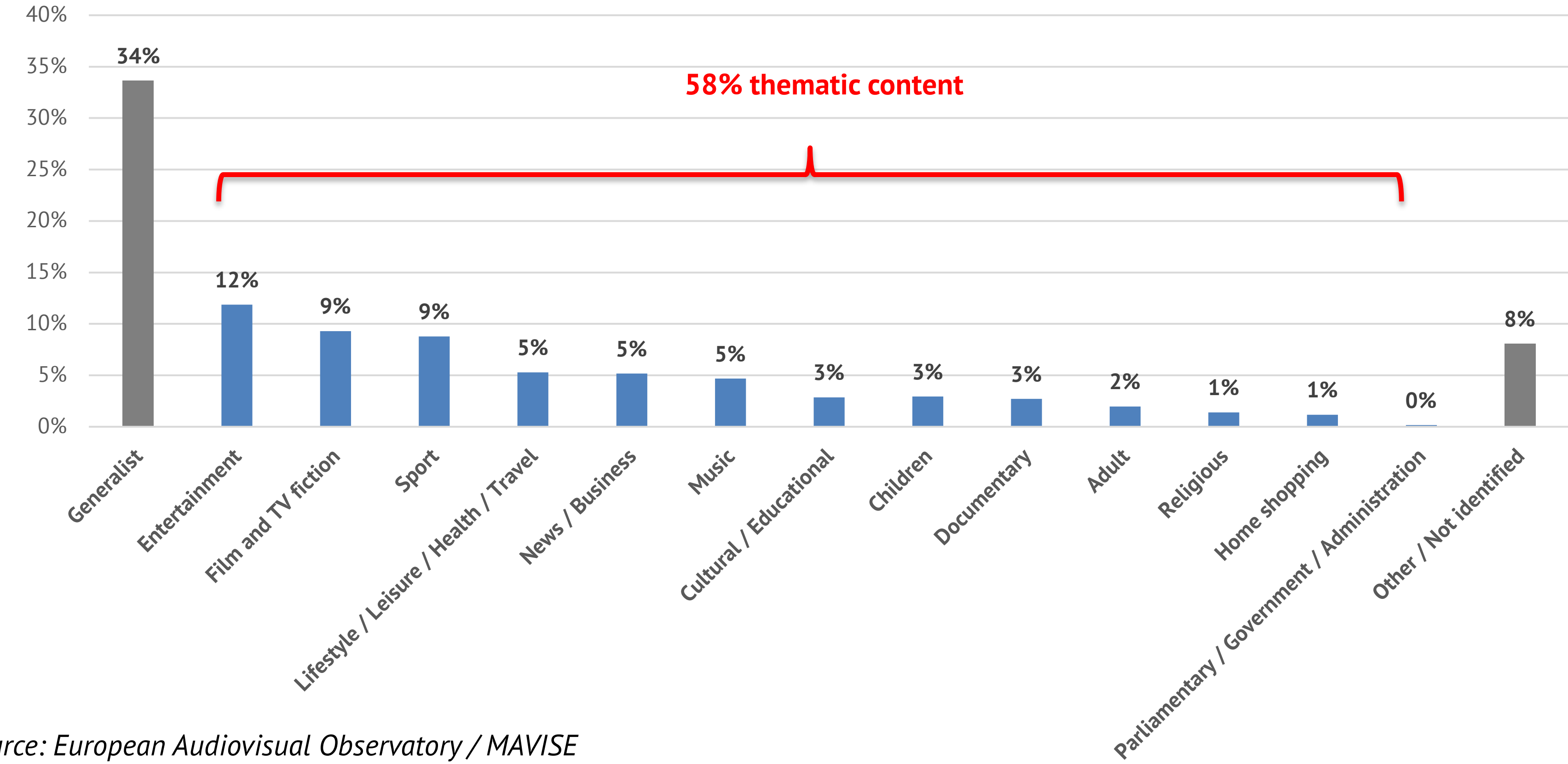
**For full list of definitions see scope and methodology section.*
Source: European Audiovisual Observatory / MAVISE

The big picture – Audiovisual media services and VSP content

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

- At least 58% of AV media services and VSP in Europe offer thematic programming.
- Among the most popular programming types are entertainment, film and TV fiction and sport.

Percentage of audiovisual media services and VSP available in Europe offering the following categories of content | Dec. 2025



Source: European Audiovisual Observatory / MAVISE

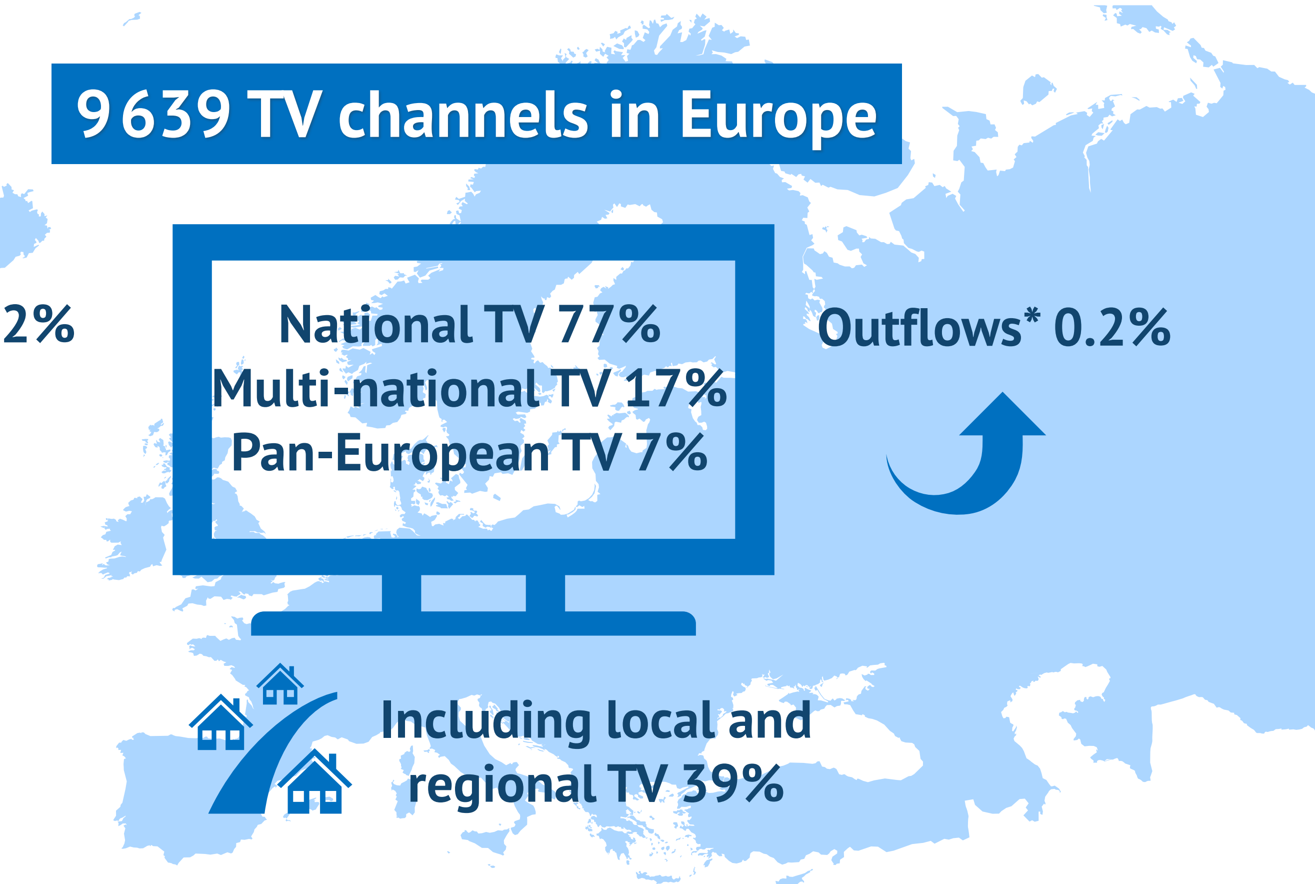
European Audiovisual Observatory

The big picture – TV channels

The big picture – TV channels in Europe

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

- **TV services targeting Europe from outside make up just 2%.**
- **Conversely, there are very few exports out of Europe (e.g., a small number of BBC Earth channels).**



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

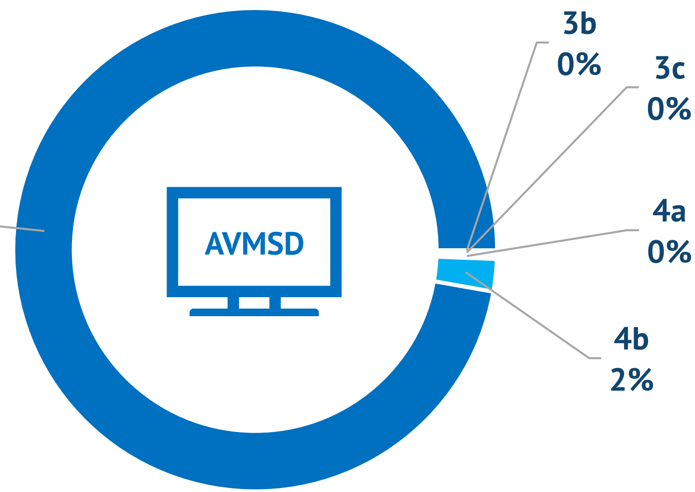
Source: European Audiovisual Observatory / MAVISE / Dec. 2025

The great majority of registered TV channels under the AVMSD are registered with the same criteria.

- **Most of all TV channels are registered based on the localisation of their head office (Article 2(3)(a).**
- **Almost all the rest of the channels are registered based on the localisation of satellite capacity in Luxembourg (Article 2(4)(b)).**

Breakdown of AVMSD registered TV channels by jurisdiction criteria | Dec. 2025

71% of TV channels* are registered under the AVMSD



* *TV channels available in MAVISE countries*

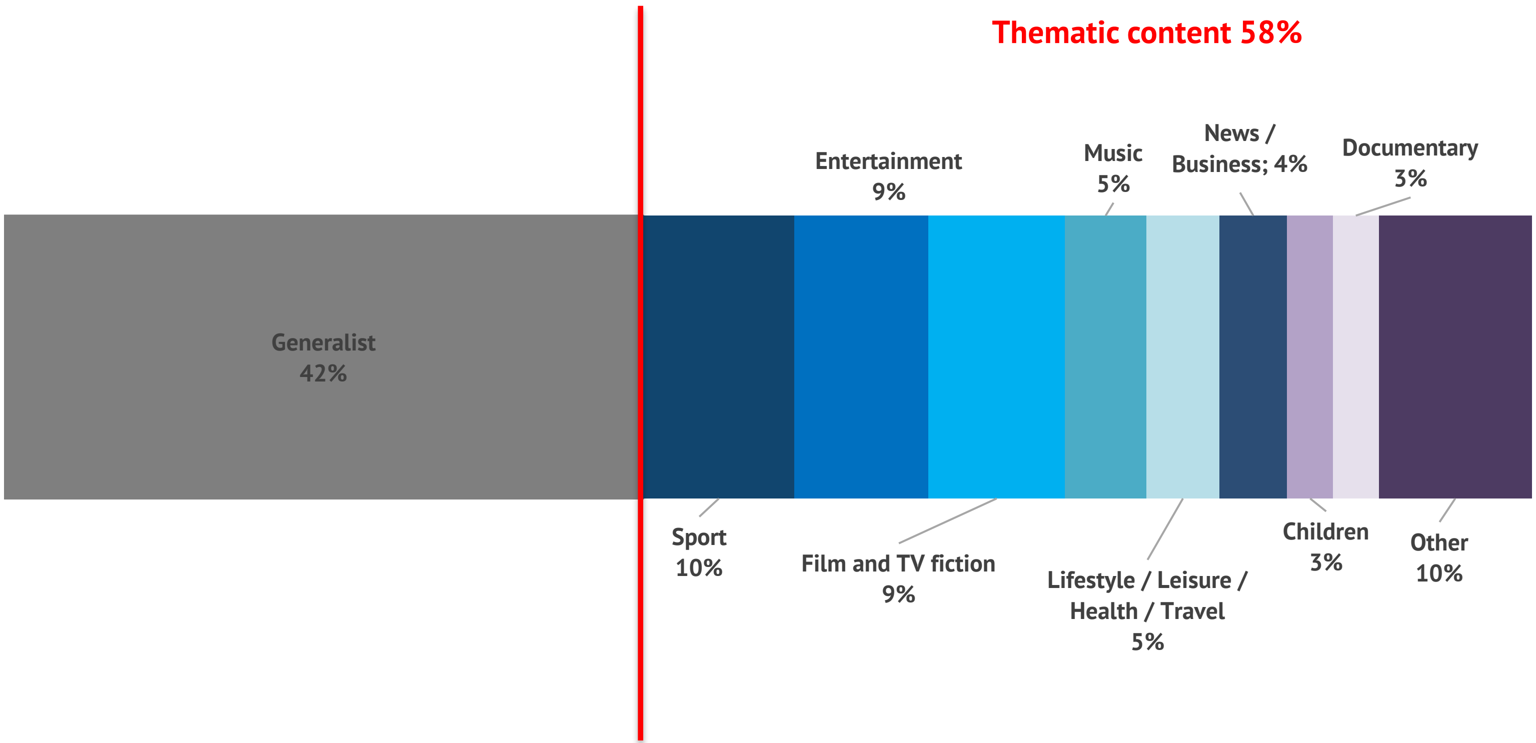
Source: European Audiovisual Observatory / MAVISE

The big picture – TV channel content

TV programming in Europe is largely defined by thematic fragmentation.

- **The greater part of the TV offering caters to special interest in the form of thematic channels.**
- **Thematic TV channels typically provide sport, entertainment, film and TV fiction content.**

Percentage of TV channels available in Europe offering the following categories of content | Dec. 2025



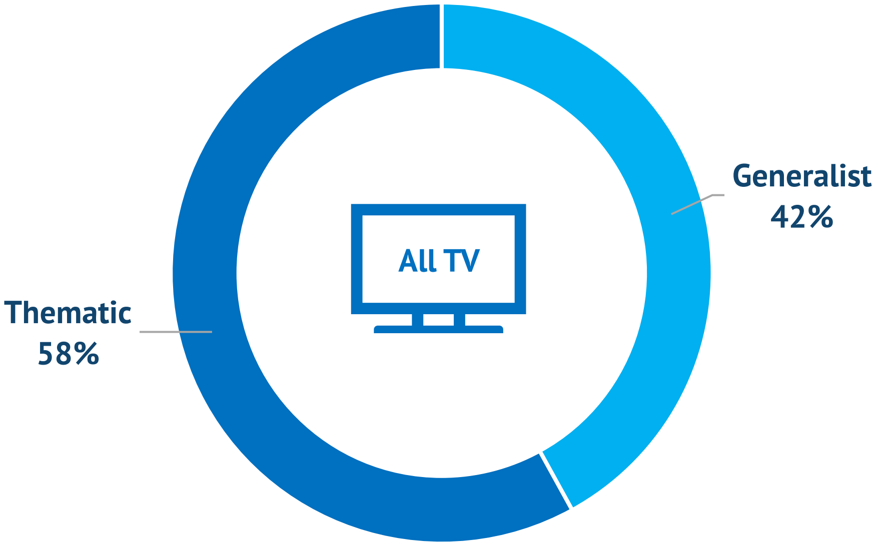
Source: European Audiovisual Observatory / MAVISE

The big picture – Local and regional TV channels

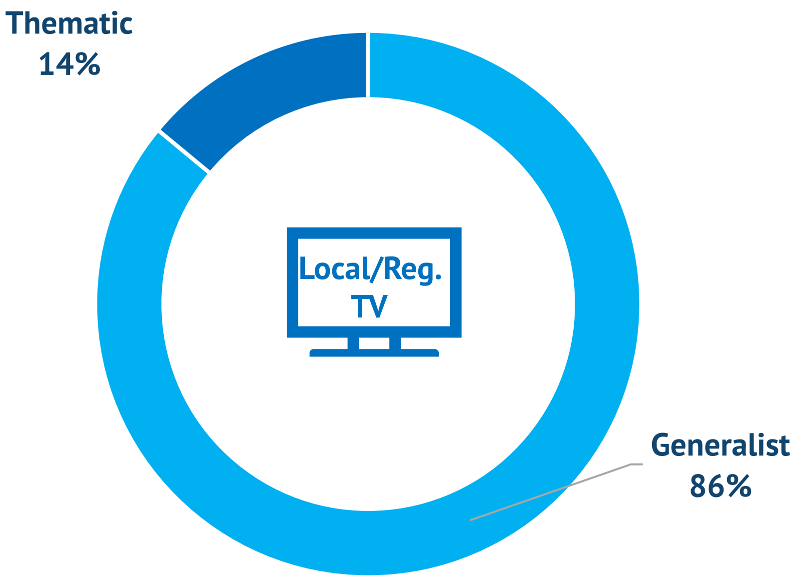
The great majority of local and regional TV channels in Europe has generalist programming.

- **Around nine out of 10 local and regional TV channels provide generalist programming.**
- **Thematic programming on local and regional level is the exception since channels aim to appeal to the largest possible audience in their respective regions.**

Percentage of all TV channels offering the following categories of content | Dec. 2025



Percentage of local and regional TV channels offering the following categories of content | Dec. 2025

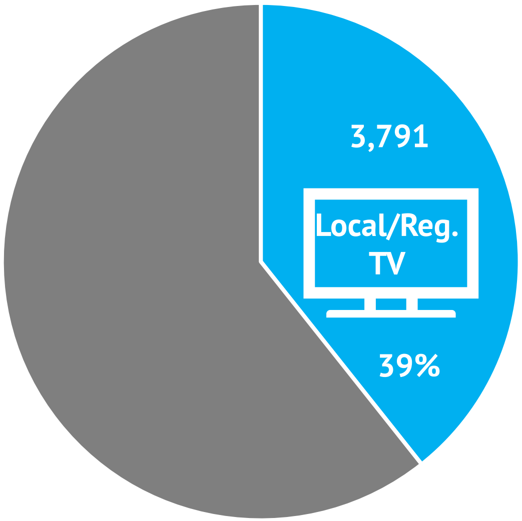


Source: European Audiovisual Observatory / MAVISE

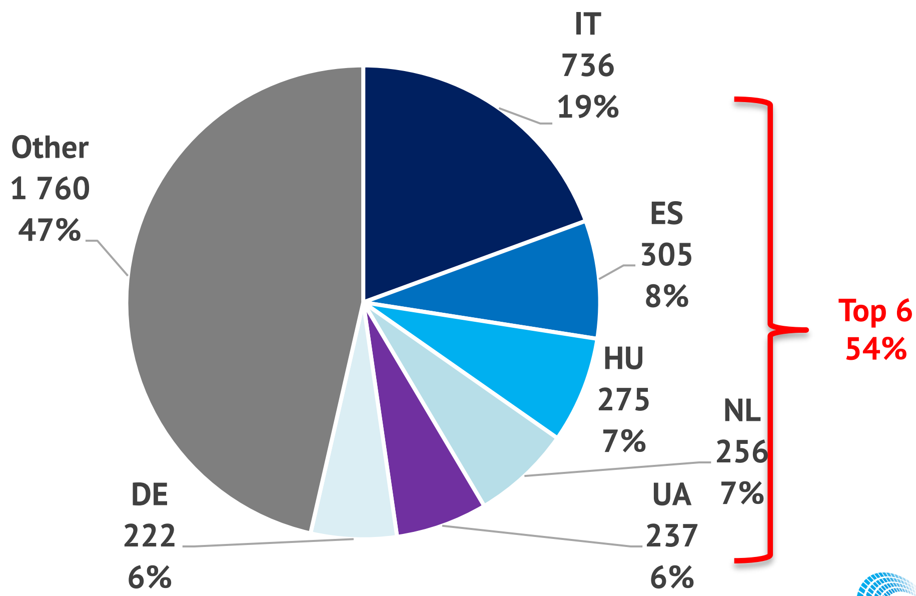
The European television sector is characterised by the significant presence of local and regional TV services.

- **Local and regional TV makes up 39% of the overall number of TV channels in Europe.**
- **Six countries account for more than half of all local TV channels.**
- **Around 70% of the Italian AV market is local channels - the equivalent of 19% of all local and regional channels in Europe.**

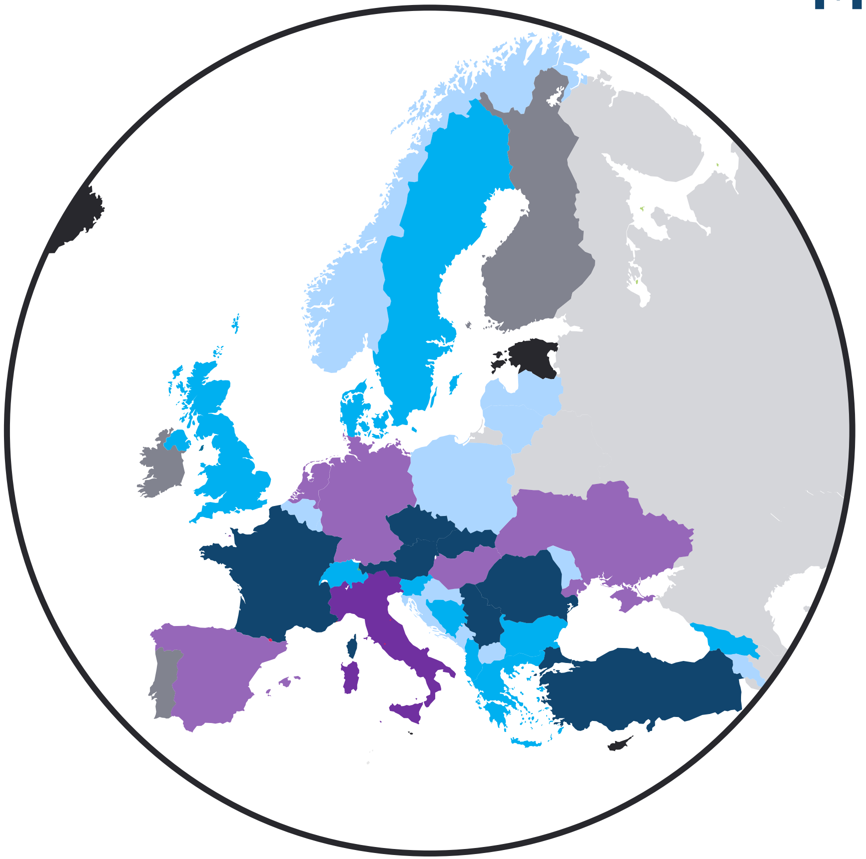
Share of local and regional TV channels available in Europe | Dec. 2025 - In number of services and %



Breakdown of local and regional TV by country | Dec. 2025 - In number of services and %



Source: European Audiovisual Observatory / MAVISE



Map of local and regional TV

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

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

European Audiovisual Observatory

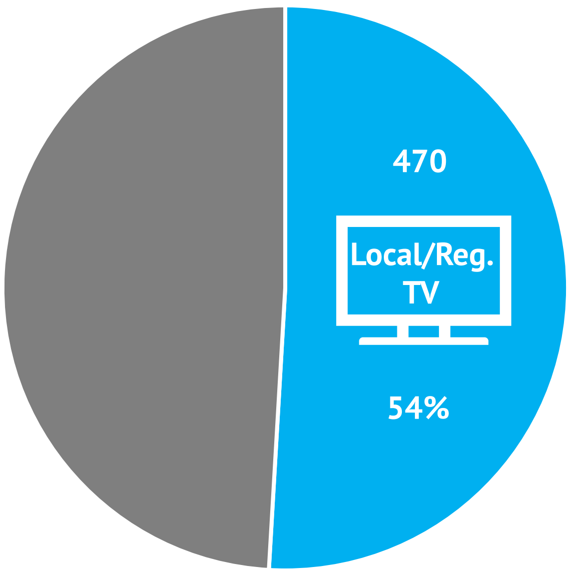
Map of Europe © Copyright Showeet.com
Source: European Audiovisual Observatory / MAVISE / Dec. 2025

The big picture – Public local and regional TV channels

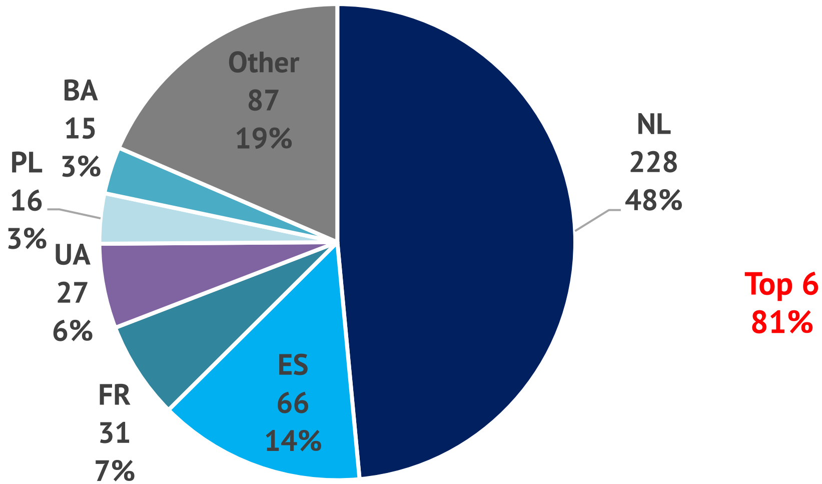
Half of all public service TV channels are local and regional services.

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

Share of local and regional channels among public TV | Dec. 2025 - In number of services and %



Breakdown of public local and regional TV by country | Dec. 2025 - In number of services and %



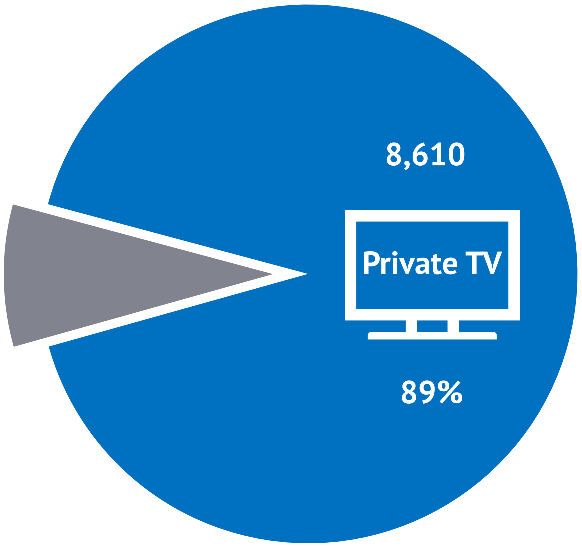
Source: European Audiovisual Observatory / MAVISE

The big picture – Private TV channels

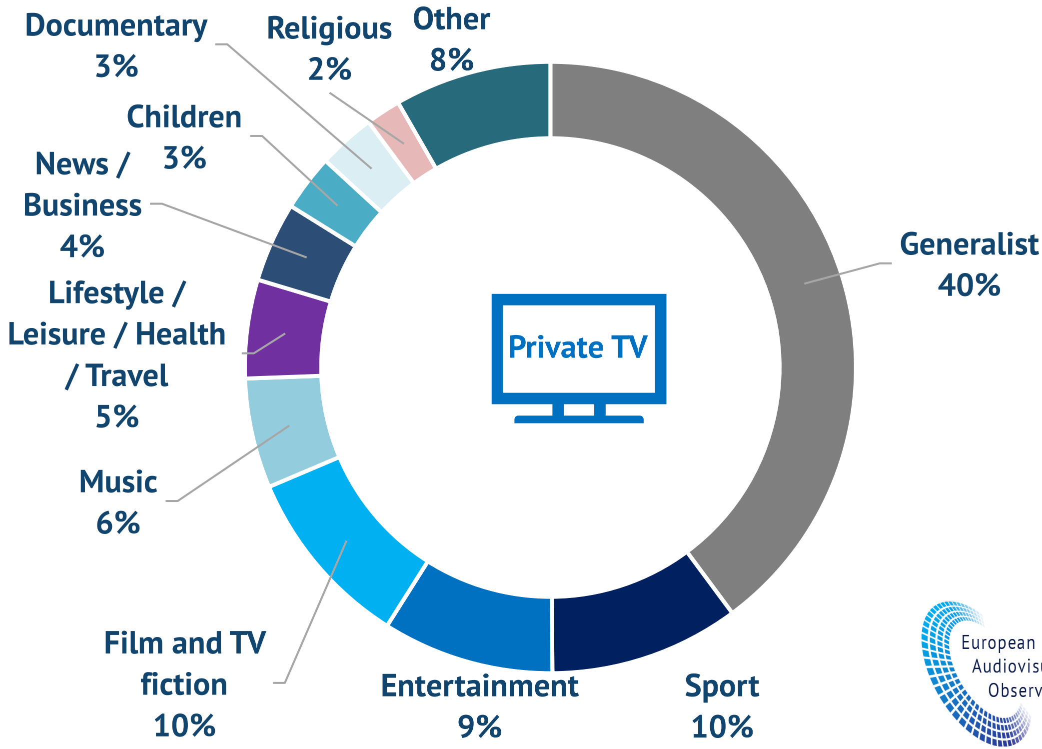
The great majority of TV channels in Europe are private.

- **Nine out of 10 TV channels in Europe are owned by private companies.**
- **Their programming focus is mostly fragmented with more than half of private TV channels (60%) providing sports, entertainment, film and TV fiction, and other thematic content.**

Share of TV channels in private ownership | Dec. 2025 - In number of services and %



Percentage of private TV channels offering the following categories of content | Dec. 2025



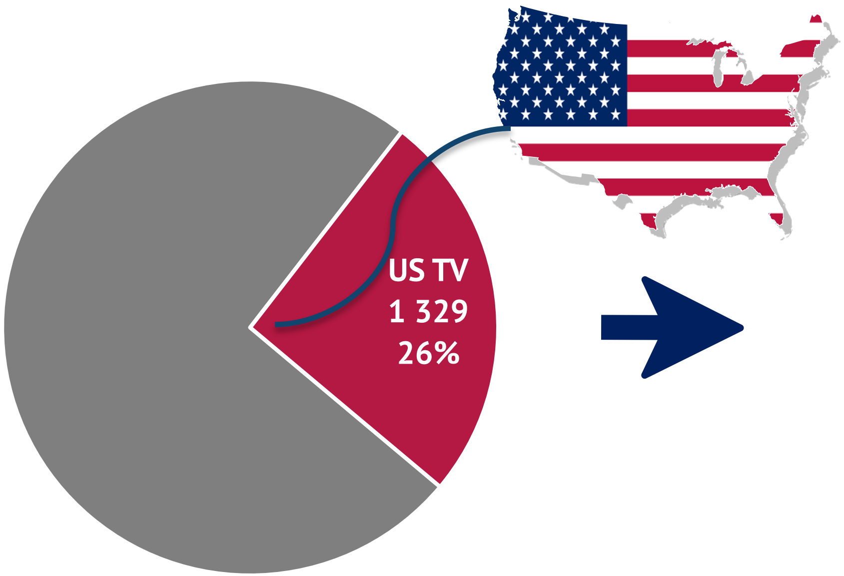
Source: European Audiovisual Observatory / MAVISE

The big picture – US share among private TV channels

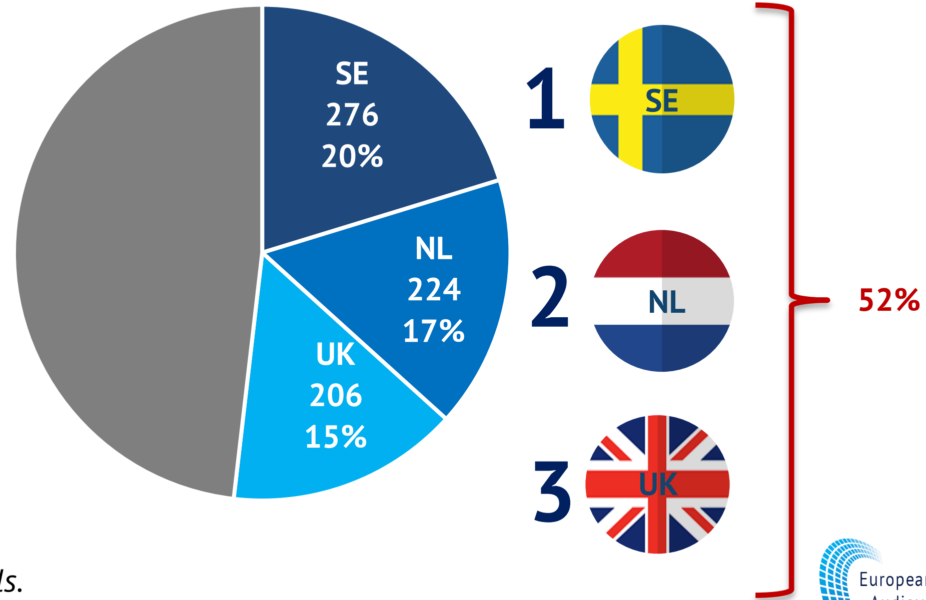
More than one in four private TV channels in Europe is US-owned.

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

US share of TV channels* in private ownership | Dec. 2025 - In number of services and %



Breakdown of US-owned private TV by country of origin | Dec. 2025 - In number of services and %



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

Flag icons © Copyright Showeet.com

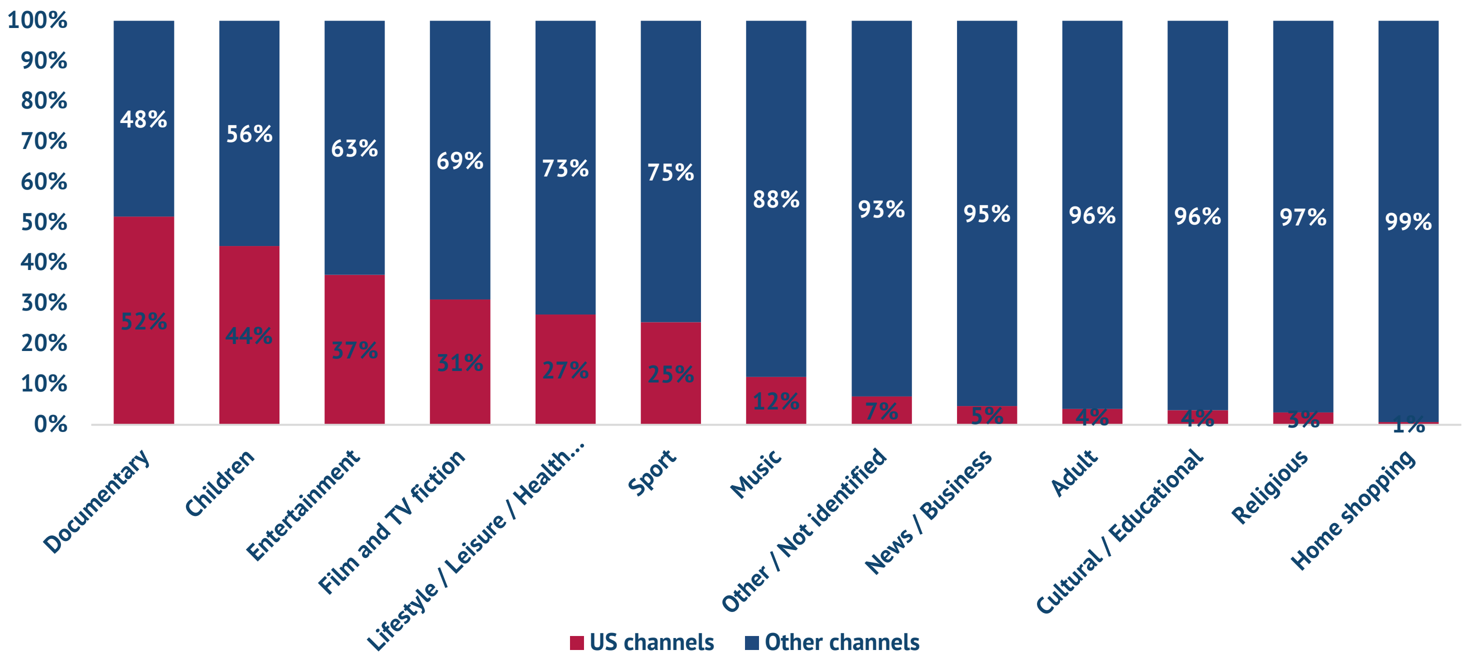
Source: European Audiovisual Observatory / MAVISE

The big picture – Programming of US TV channels

More than half of all documentary TV channels in Europe are US-owned.

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

Share of US-owned TV channels per category of content | Dec. 2025 - In %



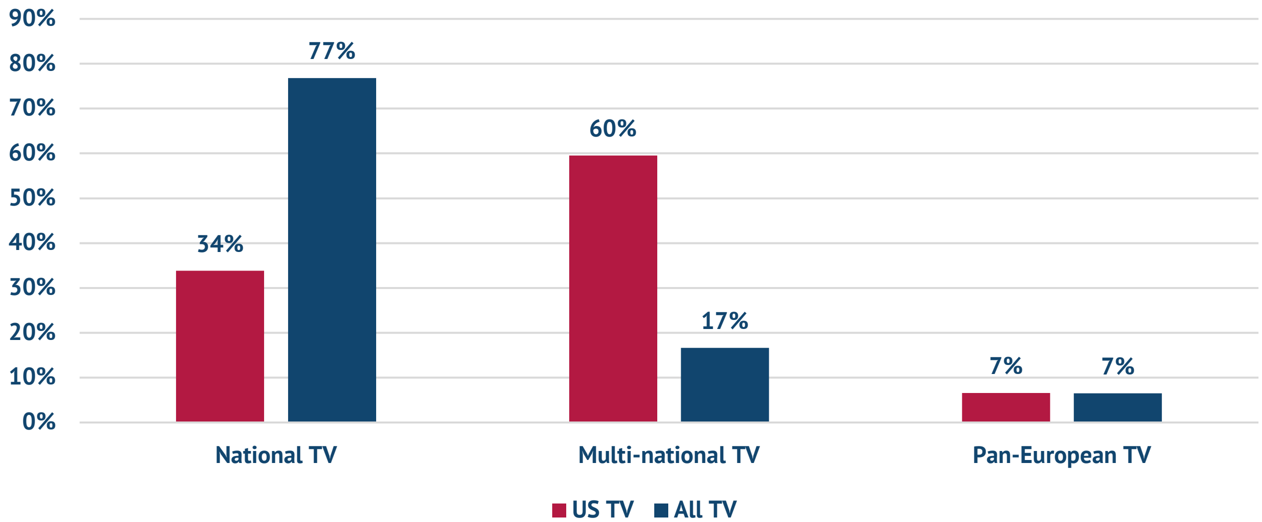
Flag icons © Copyright Showeet.com / Source: European Audiovisual Observatory / MAVISE

The big picture – Markets targeted by US TV channels

US networks are overrepresented among multi-national TV channels.

- **US channels serve markets predominantly as multi-national services.**
- **US channels are mainly distributed via cable, satellite and IPTV.**
- **Availability on DTT networks is the exception (5%).**

Share of US-owned TV channels per target market | Dec. 2025 - In %



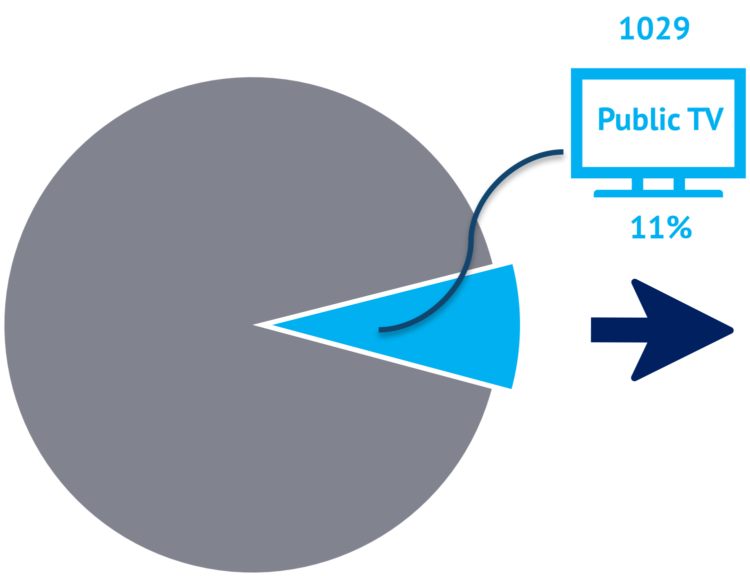
Flag icons © Copyright Showeet.com / Source: European Audiovisual Observatory / MAVISE

The big picture – Public TV channels

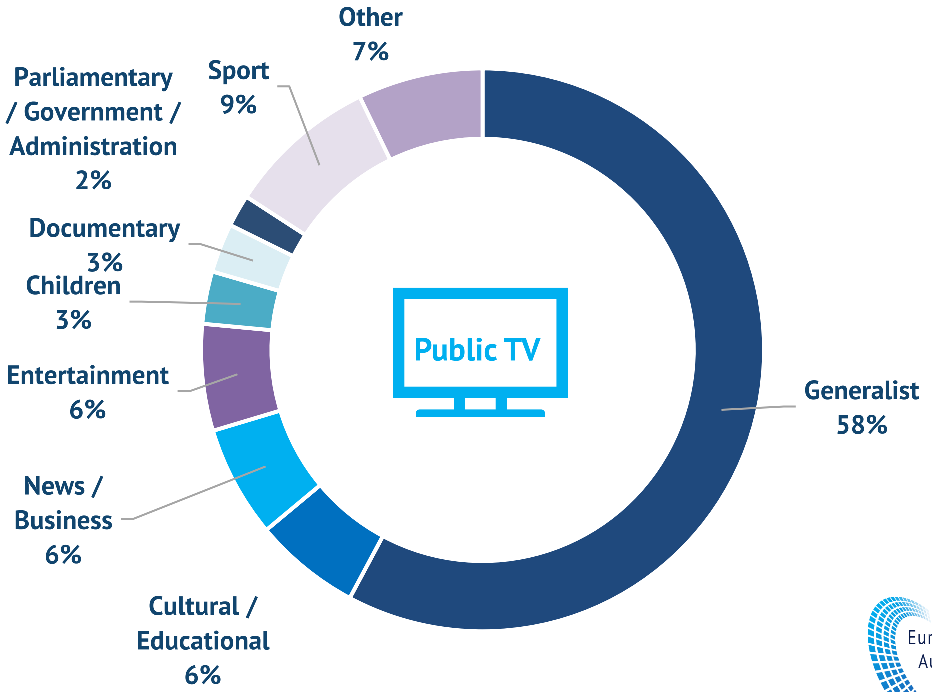
One in 10 TV channels in Europe is public.

➢ **Two-thirds of public TV channels have a generalist or cultural and educational programming offering. This mirrors their public service remit to provide accessible programming for all members of society.**

Share of TV channels in public ownership | Dec. 2025 - In number of services and %



Percentage of public TV channels offering the following categories of content | Dec. 2025



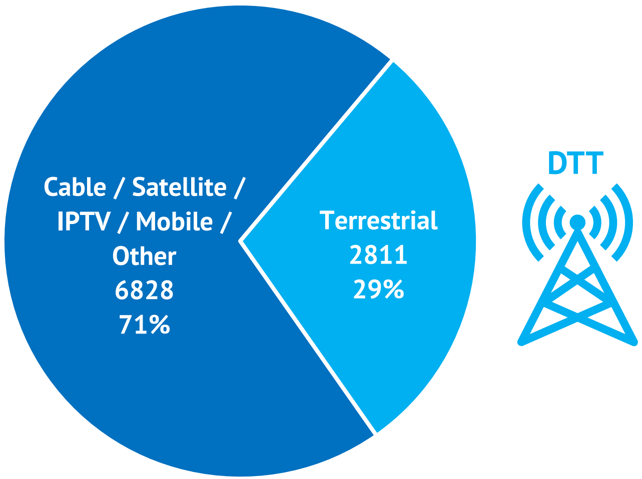
Source: European Audiovisual Observatory / MAVISE

The big picture – TV channel networks

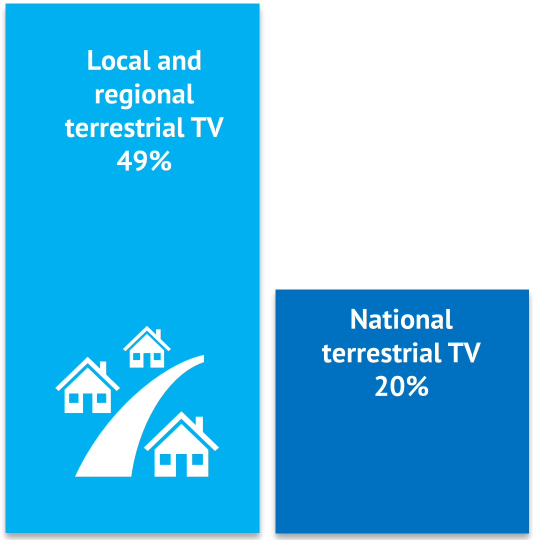
Around one in three TV channels in Europe is available on digital terrestrial networks.

- **30% of all TV channels in Europe are distributed on DTT networks. The importance of DTT networks for local TV is even more pronounced. A total of 49% of local and regional TV channels are available on DTT networks, compared to 20% of national TV services.**

Breakdown of all TV channels by network type | Dec. 2025 - In number of services and %



Share of local and regional and national TV on terrestrial networks | Dec. 2025 - In %



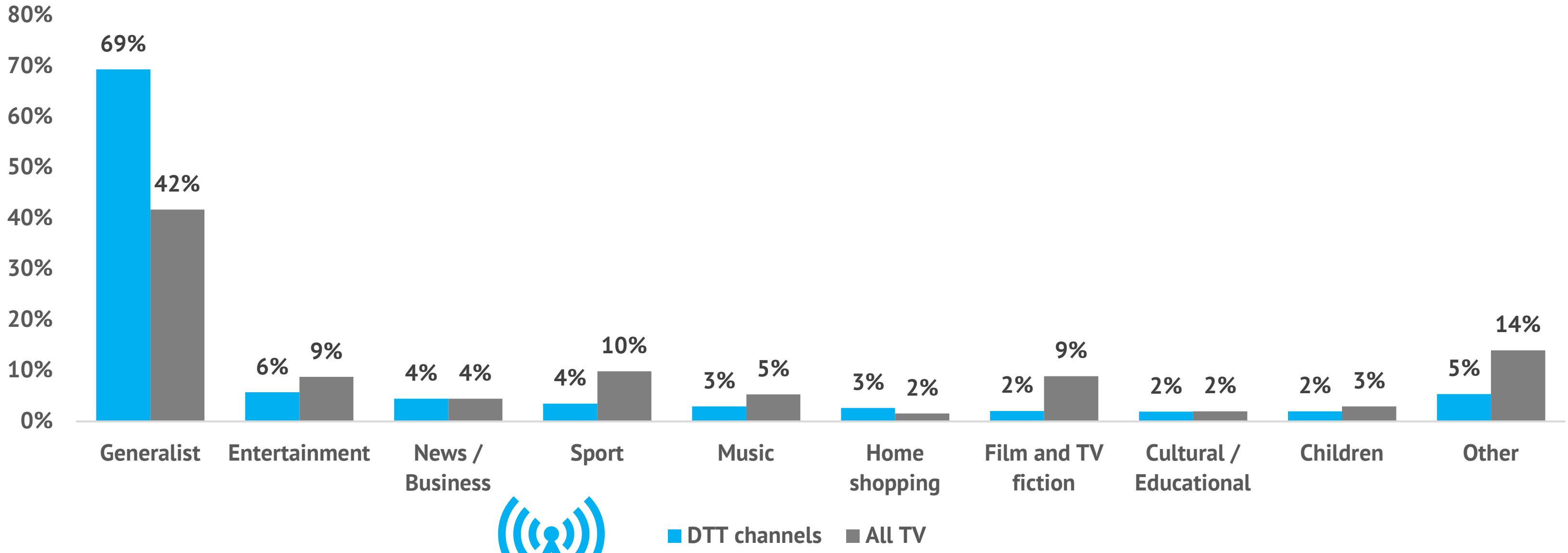
Source: European Audiovisual Observatory / MAVISE

The big picture – DTT channel programming

Generalist programming accounts for almost three quarters of the TV channels available on digital terrestrial networks.

- **Public service media are given priority regarding presence on DTT networks. Their TV services are mostly generalist channels with a broad programming offering.**
- **The programming content of TV channels available on all networks is more thematic.**

Percentage of TV channels on DTT networks offering the following categories of content | Dec. 2025



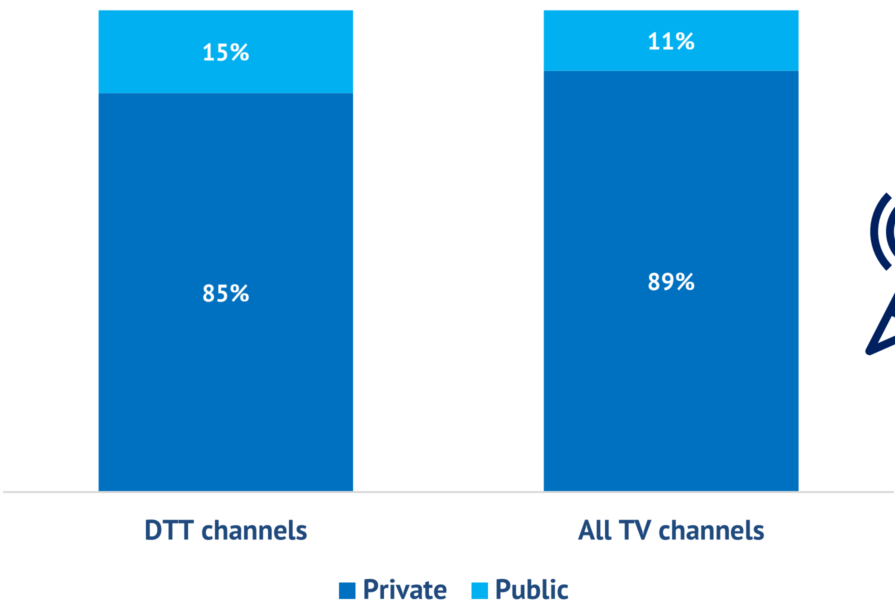
Source: European Audiovisual Observatory / MAVISE

The big picture – DTT channel ownership

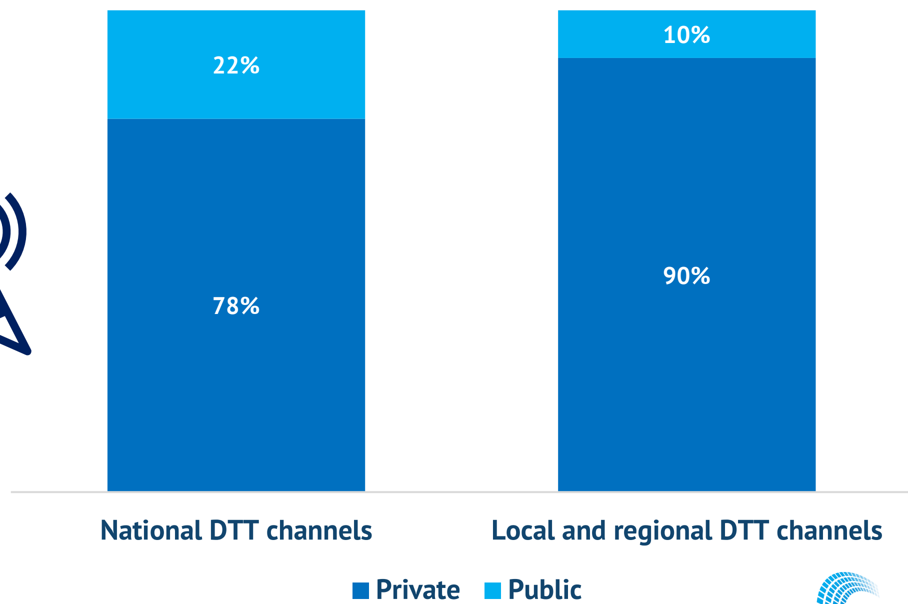
More than one in ten TV channels available on DTT networks is publicly owned.

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

Comparison of TV channels on DTT and all TV channels by ownership | Dec. 2025 - In %



Comparison of national vs. local and regional TV channels on DTT by ownership | Dec. 2025 - In %



DTT

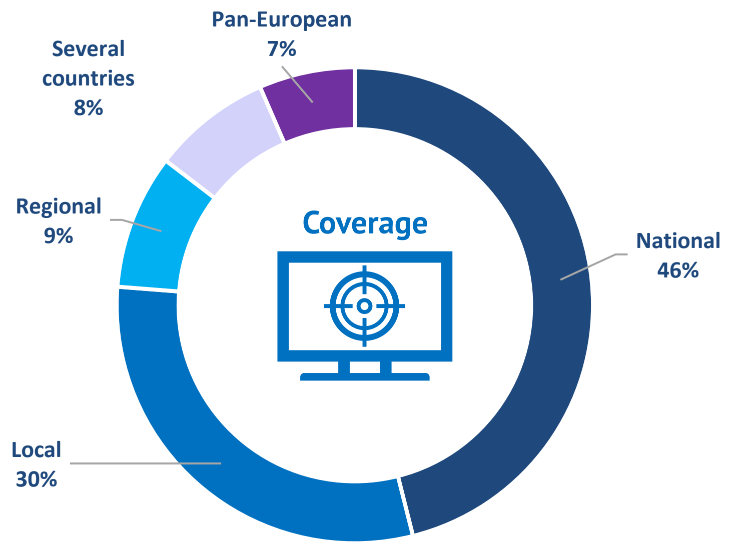
Source: European Audiovisual Observatory / MAVISE

The big picture – TV channel coverage

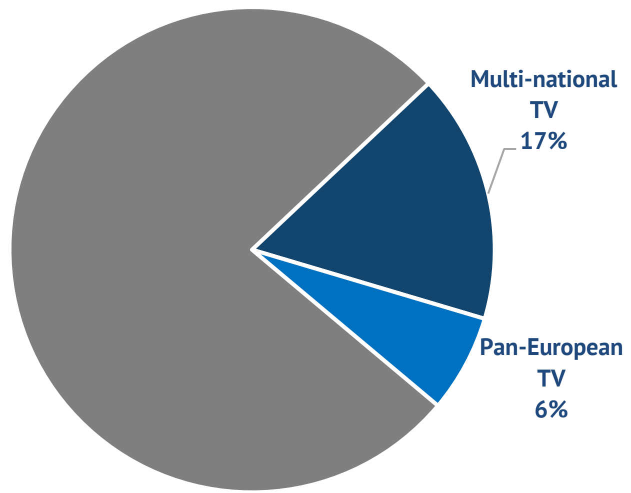
The majority (85%) of TV channels in Europe primarily serves national markets.*

- **There are almost as many TV channels with local and regional coverage as there are with national coverage.**
- **Around 17% of all TV channels in Europe serve multi-national markets and another 6% are pan-European TV services.**

Breakdown of TV channels by coverage | Dec. 2025 – In %



Share of multi-national and pan-European TV channels by target markets | Dec. 2025 - In %**



* *Regional and local channels being counted as serving national market.*

** *Multi-national TV channels are those targeting at least one specific market outside the country of establishment.*

Source: European Audiovisual Observatory / MAVISE

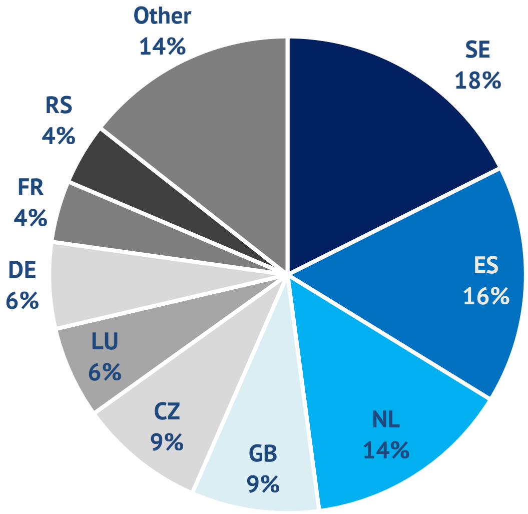
European Audiovisual Observatory

The big picture – Multi-national TV channel hubs

There are 1 602 TV channels in Europe exclusively targeting multi-national markets.

- **Four countries account for 57% of multi-national TV channels:e Spain, Sweden, the Netherlands and the United Kingdom.**

Main hubs for multi-national TV channels | Dec. 2025 - In %



Examples of multi-national TV networks based in top 3 hubs | Dec. 2025

1 

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

2 

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

3 

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

Flag icons © Copyright Showeet.com
Source: European Audiovisual Observatory / MAVISE

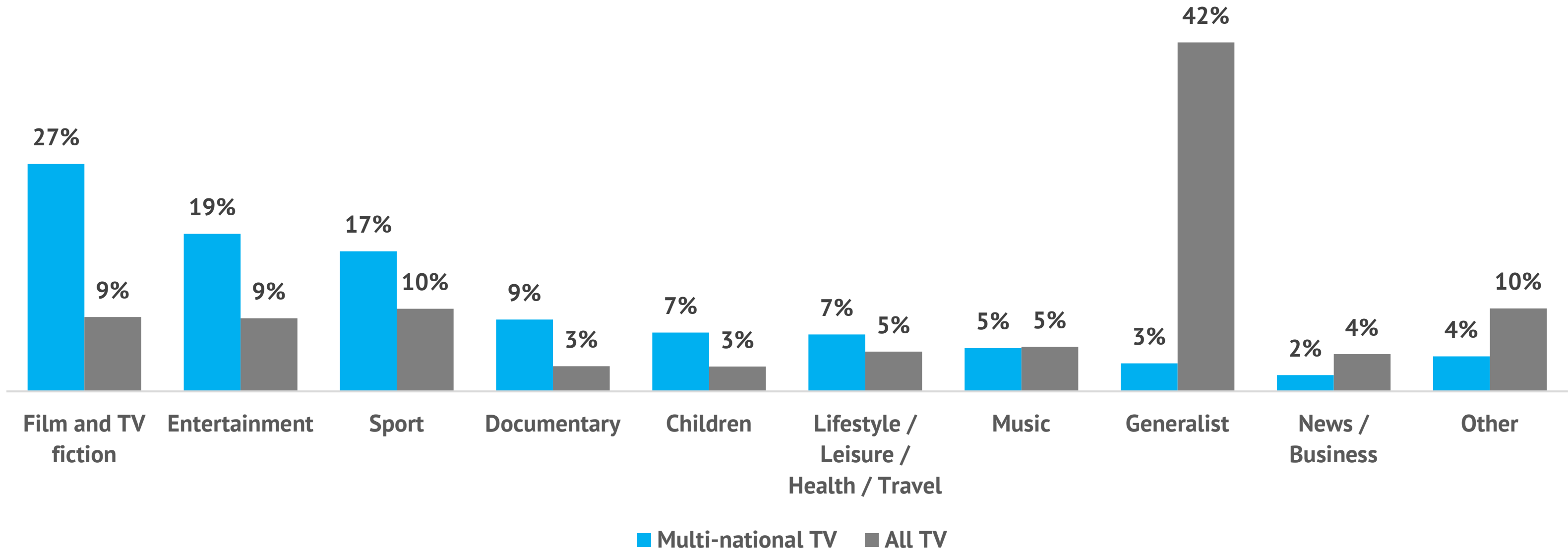
European Audiovisual Observatory

The big picture –Multi-national TV channel programming

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

- Multi-national TV channels focus on film and TV fiction, entertainment and sport content.
- Examples of multi-national TV are US networks such as Warner Bros. Discovery, Paramount or Disney, and European networks like the United Group (BC Partners, UK) or RTL (Bertelsmann, DE).

Percentage of multi-channel TV channels offering the following categories of content | Dec. 2025



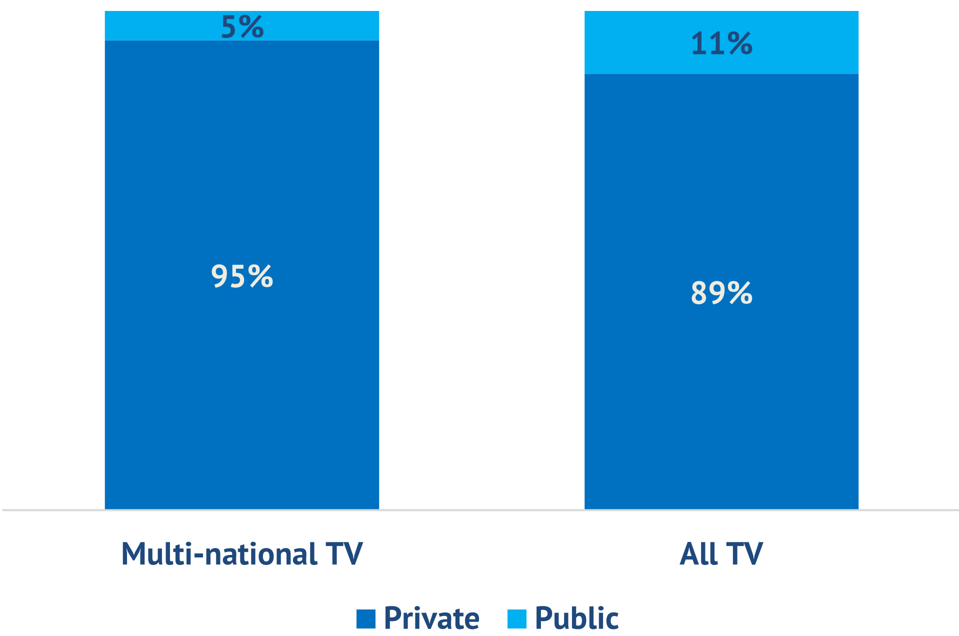
Source: European Audiovisual Observatory / MAVISE

The big picture – Ownership of multi-national TV channels

Multi-national TV channels are predominantly in private ownership.

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

Breakdown of multi-national TV channels by ownership | Dec. 2025 - In %



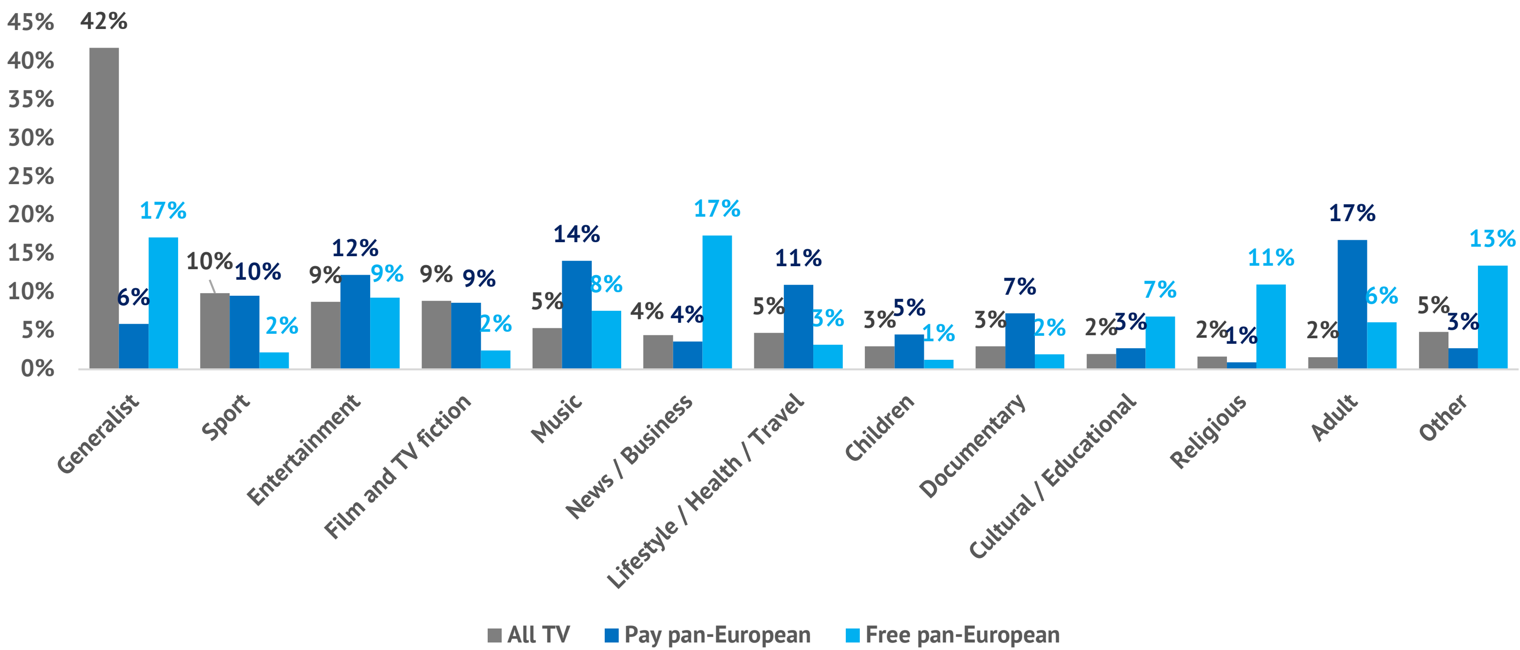
Source: European Audiovisual Observatory / MAVISE

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

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

- **65% of pan-European TV channels available in Europe are accessible for free.**
- **Free pan-European TV channels focus mainly on news and generalist content.**
- **Pan-European pay TV channels concentrate on adult, music, entertainment, lifestyle and sport.**

Percentage of free and pay pan-European TV channels offering the following categories of content | Dec. 2025



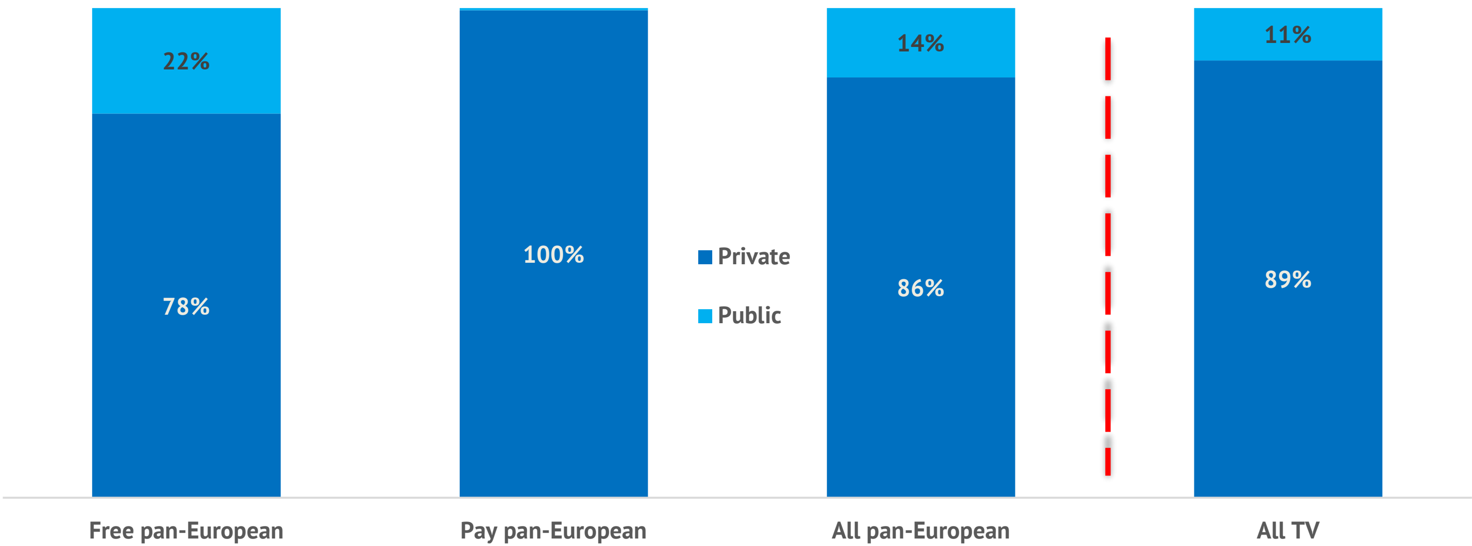
Source: European Audiovisual Observatory / MAVISE

The big picture – Ownership of pan-European TV channels

Public service media are better represented among free pan-European TV channels.

- Free pan-European public channels are focused on generalist, cultural-educational, and news content.
- Most public TV channels available across Europe originate from Russia, China, Spain and France.

Breakdown of pan-European TV channels by ownership | Dec. 2025 - In %



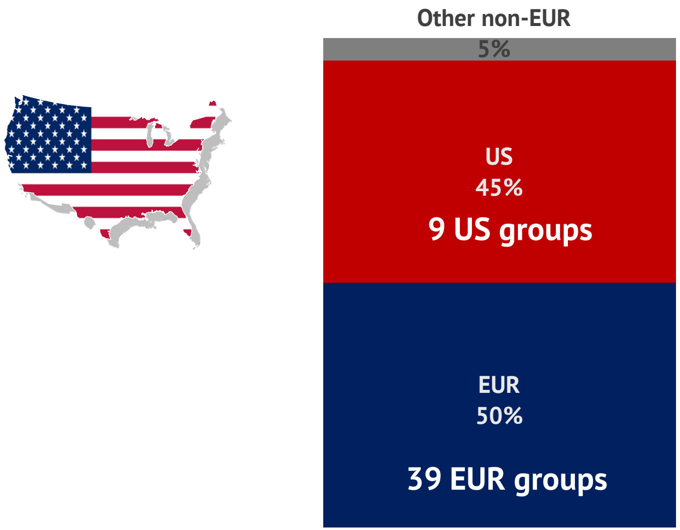
Source: European Audiovisual Observatory / MAVISE

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

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

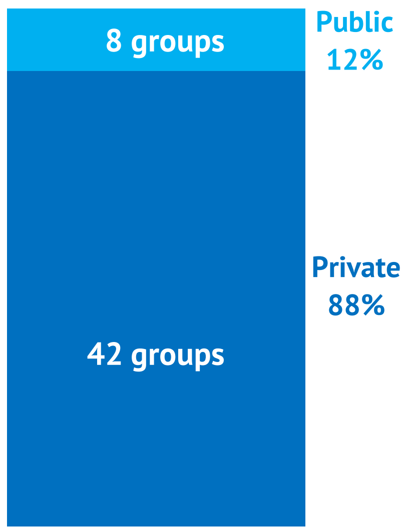
- **Nine US players operate the majority (45%) of TV channels with a non-European parent company.**
- **The top public service broadcasters decline regarding the volume of TV channels operated. Eight public broadcasters operate 12% of TV channels among the top 50 TV players.**

Breakdown of TV channels operated by top 50 TV groups by region of final owner | Dec. 2025 - In %



Region of parent company

Breakdown of TV channels operated by top 50 TV groups by ownership | Dec. 2025 - In %



Ownership

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

Flag icons © Copyright Showeet.com / Source: European Audiovisual Observatory / MAVISE

The big picture– Ownership of top 10 TV players

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

- **Half of the top 10 TV groups active in Europe is made of US players.**
- **US players Paramount and Warner Bros. Discovery have by far the biggest TV channel portfolios among the top 10 TV groups active in Europe.**
- **Over half of Telekom Srbjia's portfolio comprises sports TV channels (61), which operate in various countries (Serbia, Croatia, Bosnia…).**

Top 10 TV players by number of services | Dec. 2025

Rank	Company	Ownership	# TV
1	Paramount Skydance (US)	Private	381
2	Warner Bros. Discovery (US)	Private	361
3	Comcast (US)	Private	171
4	The Walt Disney Company (US)	Private	147
5	Groupe Canal Plus (FR)	Private	134
6	Telekom Srbija (RS) / State of RS	Public	104
7	United Group (CZ) / BC Partners (UK)	Private	98
8	Rakuten Inc (JP)	Private	97
9	BBC (UK) / State of UK	Public	71
10	AMC Networks Inc (US)	Private	70

Source: European Audiovisual Observatory / MAVISE

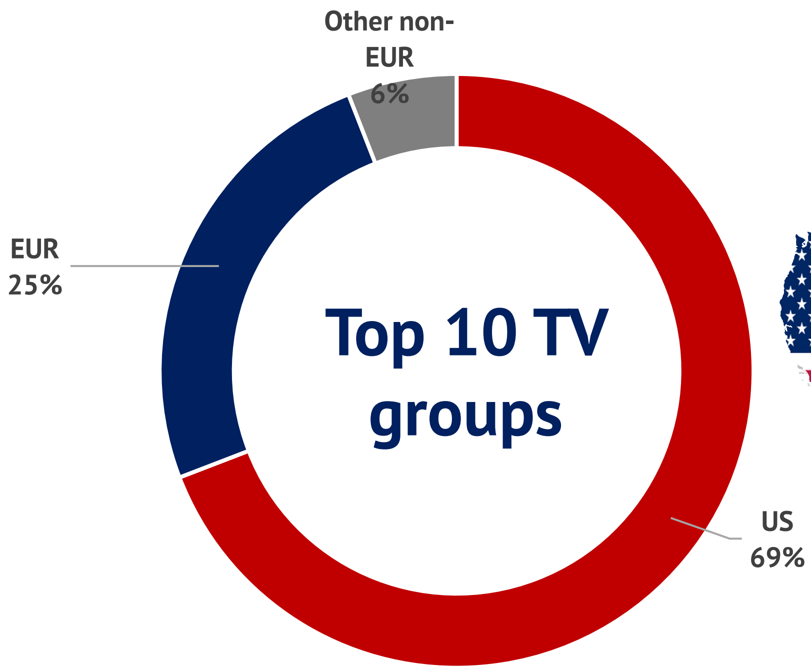
European Audiovisual Observatory

The big picture– US share among top 10 TV players

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

- **Despite an almost equal number of US-owned TV groups and those with a European parent company in the top 10, US channel portfolios are more than twice the size of European ones.**
- **69% of TV channels in the top 10 TV groups belong to five US parent companies.**
- **The top 10 TV groups in Europe represent 17% of the total TV channel offering in Europe.**

US share among top 10 TV groups TV channel portfolio | Dec. 2025 - In number of services and %



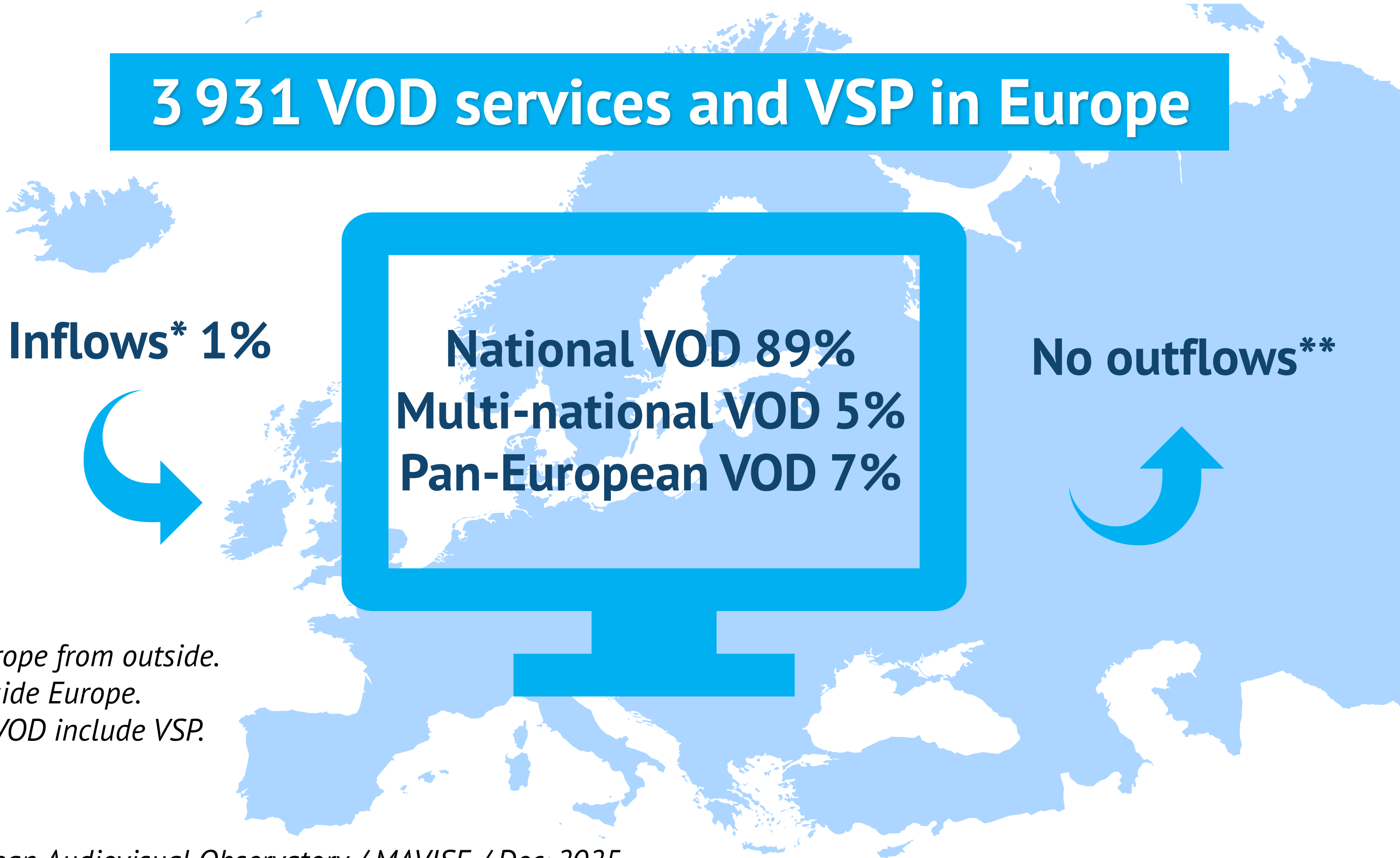
Flag icons © Copyright Showeet.com
Source: European Audiovisual Observatory / MAVISE

The big picture – VOD services and VSP

The big picture – VOD services and VSP in Europe

Most VOD services and video-sharing platforms in Europe exclusively serve national markets (89%).

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



** Targeting Europe from outside.*
*** Exports outside Europe.*
References to VOD include VSP.

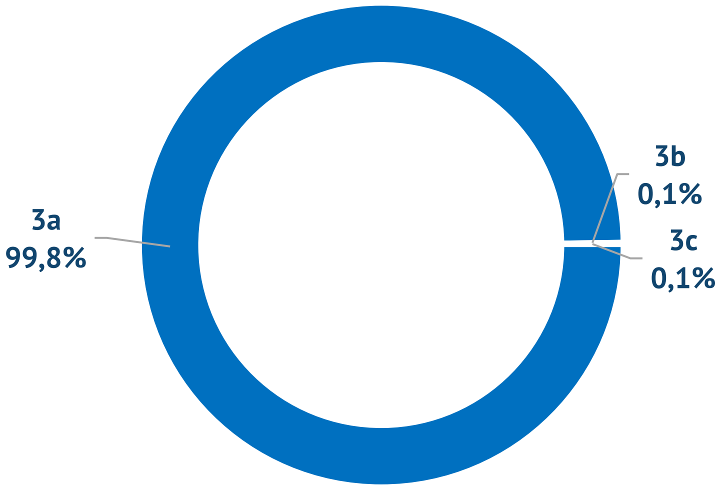
Source: European Audiovisual Observatory / MAVISE / Dec. 2025

The big picture – VOD and VSP registered under the AVMSD

All VOD services and the vast majority of VSP under the AVMSD are registered with the same criteria.

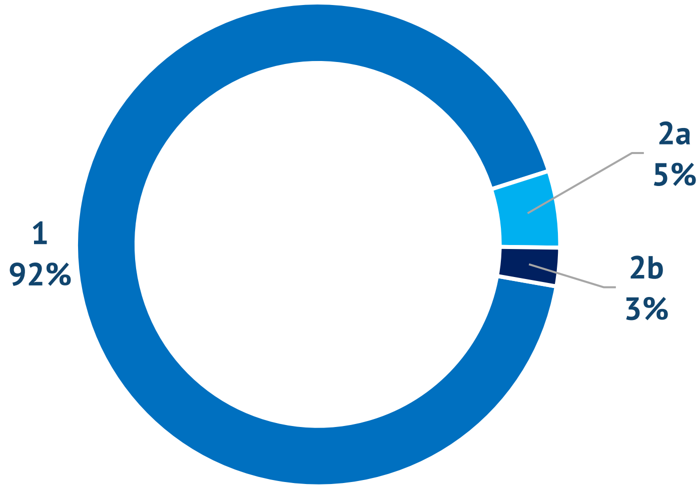
- **All TV channels are registered based on the localisation of their head office (Article 2(3)(a)).**
- **The vast majority of VSP are registered under (Article 2(1)).**

Breakdown of AVMSD registered VOD by jurisdiction criteria | Dec. 2025



85% of VOD services and 74% of VSP* are registered under the AVMSD

Breakdown of AVMSD registered VSP by jurisdiction criteria | Dec. 2025



* *VOD services and VSP available in MAVISE countries*

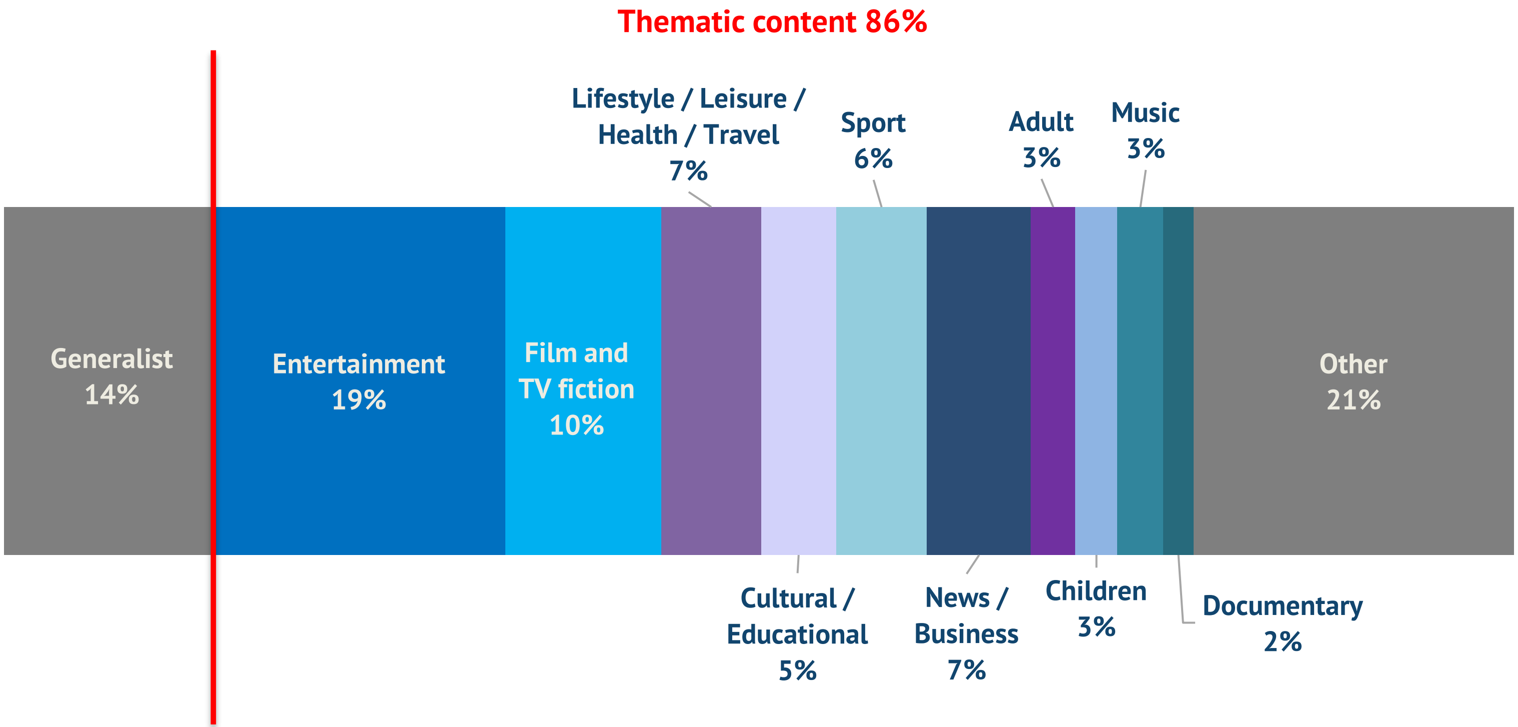
Source: European Audiovisual Observatory / MAVISE

The big picture – VOD services and VSP content

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

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

Percentage of VOD services and VSP offering the following categories of content | Dec. 2025



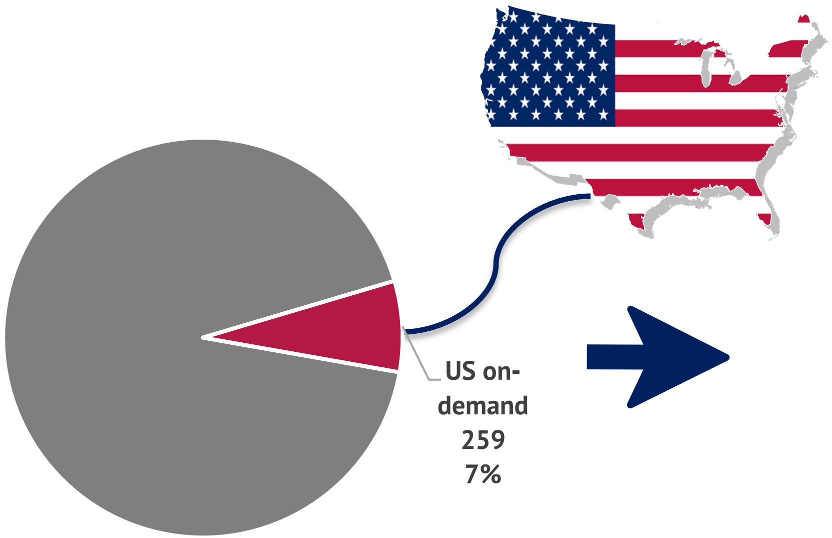
Source: European Audiovisual Observatory / MAVISE

The big picture – US-owned VOD services and VSP

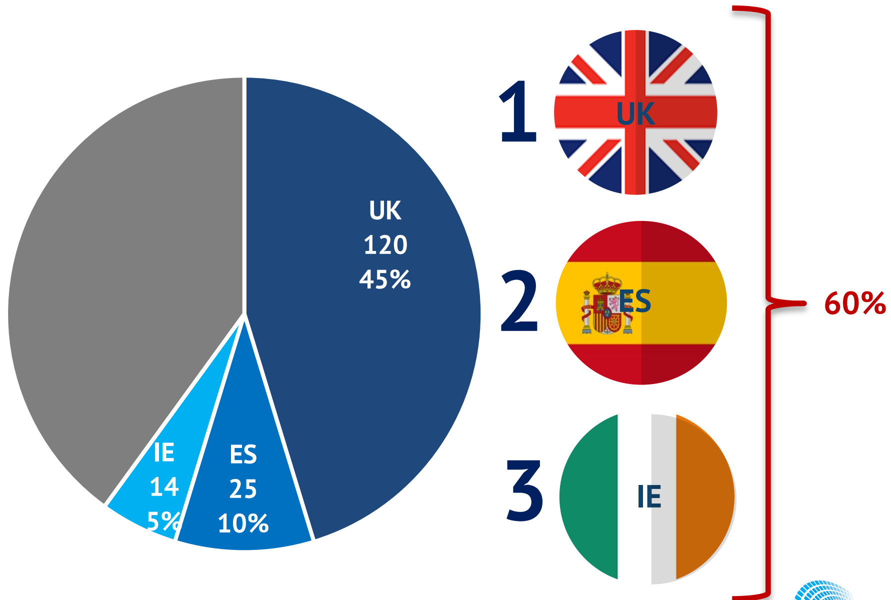
Less than one in 10 VOD services and VSP in Europe is US-owned.

- **Almost half of US-owned VOD services and VSP are based in the United Kingdom.**
- **Most US-owned VOD services and VSP serve European markets with country-specific catalogues.**
- **VOD services and VSP are counted on service level, irrespective of the number of catalogues.**

Share of US-owned* VOD services and VSP available in Europe | Dec. 2025 - In number of services and %



Breakdown of US-owned VOD services and VSP by country of origin | Dec. 2025 - In number of services and %



**Including joint ventures with US participation; excluding public, local/regional services.*

Flag icons © Copyright Showeet.com / Source: European Audiovisual Observatory / MAVISE

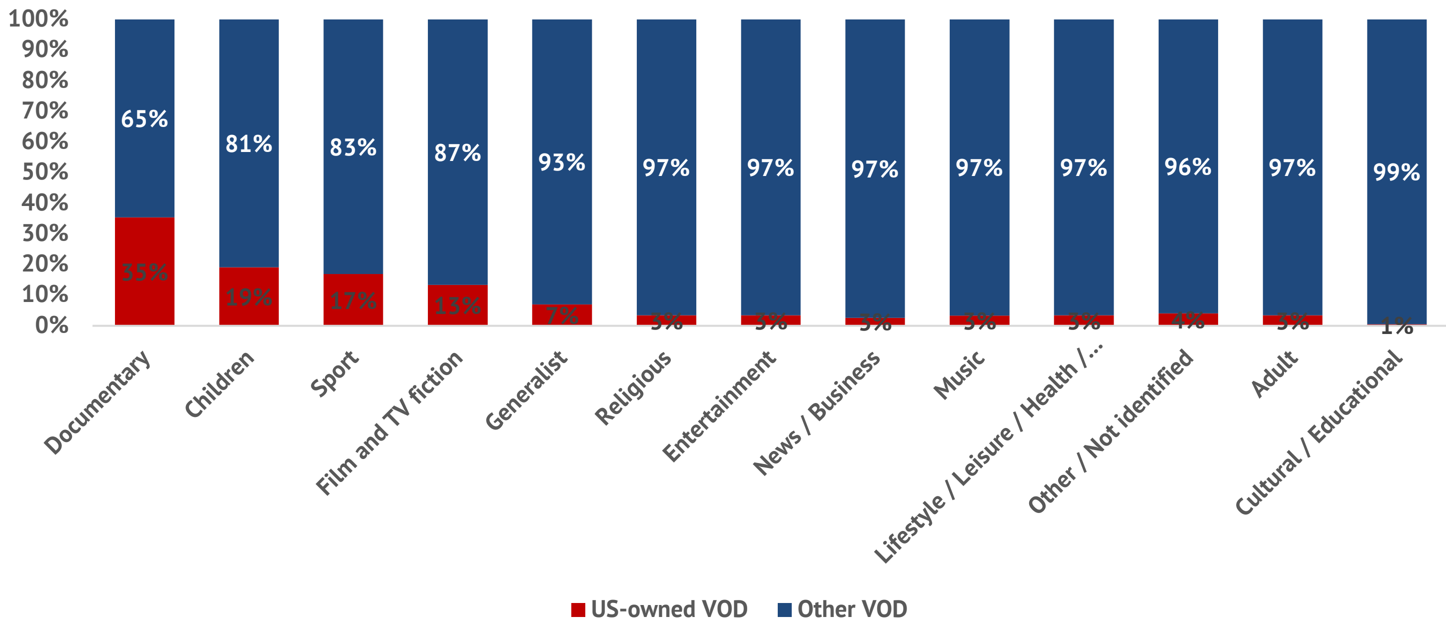
European Audiovisual Observatory

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

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

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

Share of US-owned VOD services and VSP per category of content | Dec. 2025 - In %



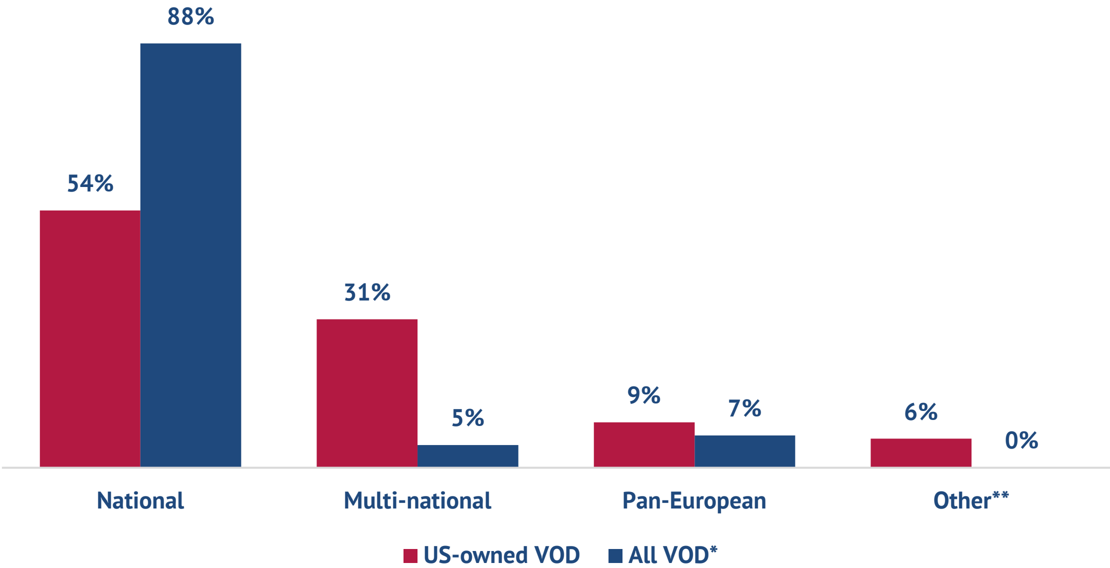
Flag icons © Copyright Showeet.com / Source: European Audiovisual Observatory / MAVISE

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

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

- **Many US VOD services and VSP target markets different to their country of establishment. Half of US services and platforms operate exclusively as national services.**

Share of US-owned VOD services and VSP per target market | Dec. 2025 - In %



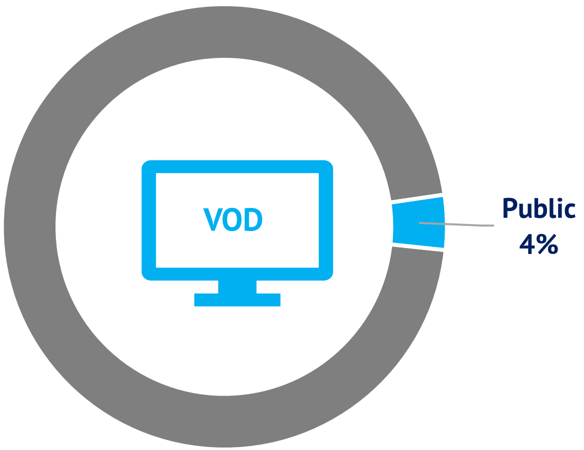
** All private VOD services excluding local/regional services.*
*** Other includes services targeting European markets from outside of Europe.*
Flag icons © Copyright Showeet.com / Source: European Audiovisual Observatory / MAVISE

The big picture – Ownership of VOD services and VSP

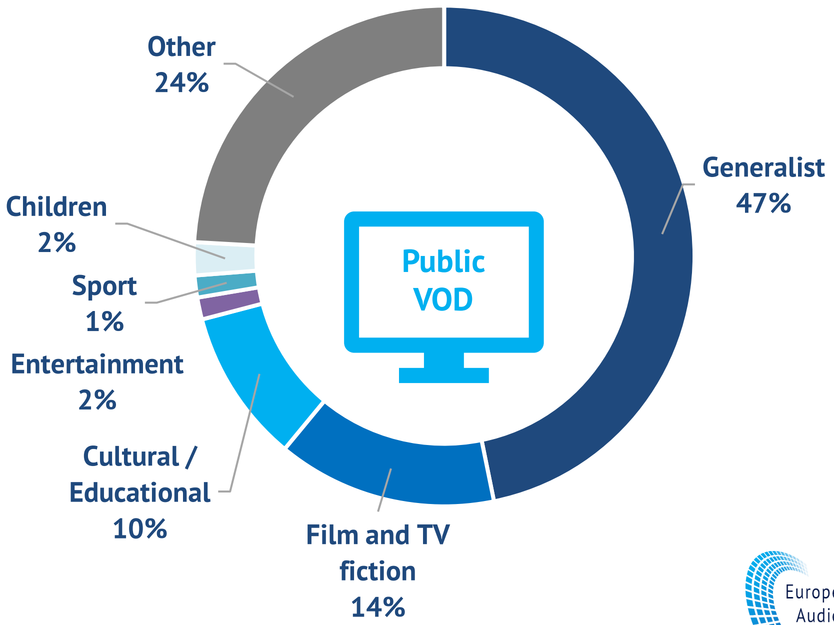
The overwhelming majority of VOD services and VSP in Europe are in private ownership.

- **Publicly-owned players have entered the VOD market as well, offering mostly generalist programming (47%).**
- **Public services also provide thematic programming such as film archives, cultural and educational online services, platforms for children and entertainment services.**

Breakdown of VOD services and VSP by ownership | Dec. 2025 - In %



Percentage of public VOD services offering the following categories of content | Dec. 2025



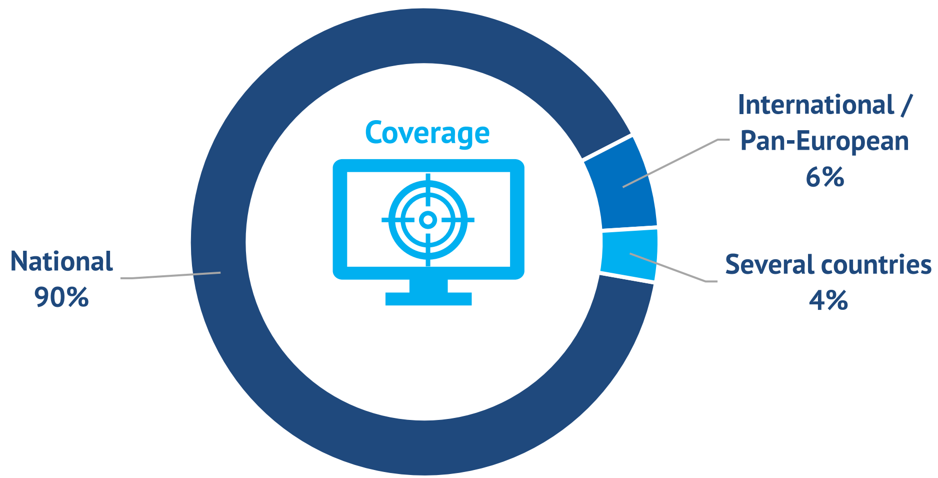
Source: European Audiovisual Observatory / MAVISE

The big picture – Coverage of VOD services and VSP

The majority (90%) of VOD services and VSP in Europe operate exclusively on national level.

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

Breakdown of VOD services and VSP by coverage | Dec. 2025 – In %



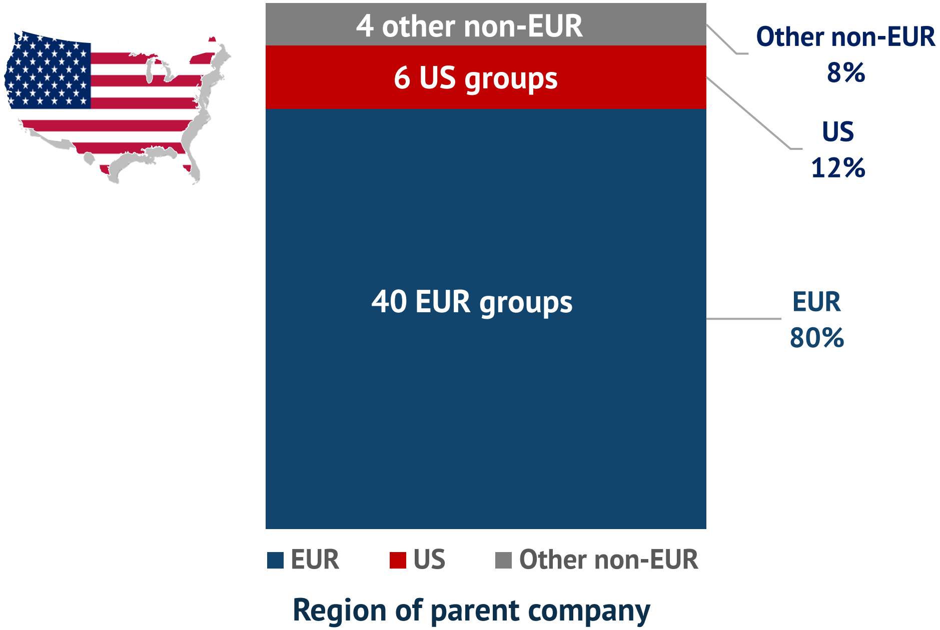
Source: European Audiovisual Observatory / MAVISE

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

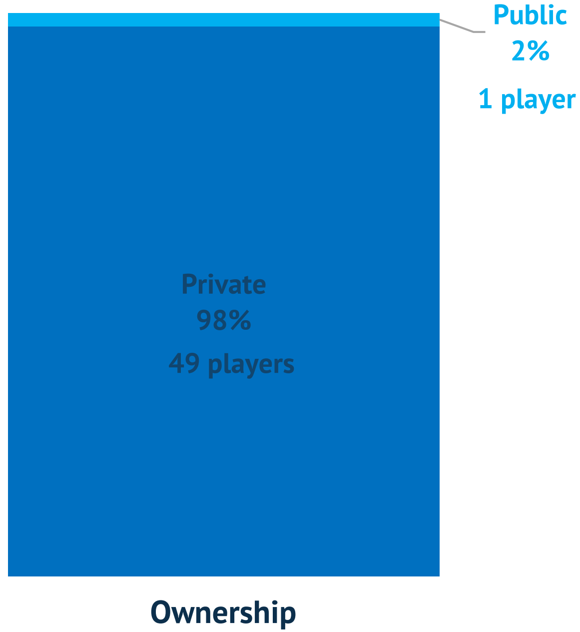
The top 50 VOD players* is dominated by European companies.

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

Breakdown of services operated by top 50 groups for VOD services and VSP by region of final owner | Dec. 2025 - In %



Breakdown of services operated by top 50 groups for VOD services and VSP by ownership | Dec. 2025 - In %



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

Flag icons © Copyright Showeet.com / Source: European Audiovisual Observatory / MAVISE

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

One US company left the top 10 VOD players in 2025 (Paramount).

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

Top 10 VOD players by number of services | Dec. 2025

Rank	Company	Ownership	# ODAS
1	Grupa Polsat Plus (PL)	Private	69
2	Groupe Canal Plus (FR)	Private	65
3	Comcast (US)	Private	47
4	Warner Bros. Discovery (US)	Private	44
5	Polski Koncern Naftowy Orlen (PL)	Private	43
6	Starmax Media (PL)	Private	31
7	Mediawan/KKR (FR)	Private	29
8	The Walt Disney Company (US)	Private	28
9	United Group (CZ) / BC Partners (UK)	Private	24
10	Telefonica (ES)	Private	23

Source: European Audiovisual Observatory / MAVISE

European Audiovisual Observatory

The big picture – US share among top 10 VOD players

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

- **30% of VOD services and VSP in the top 10 VOD groups belong to three US parent companies (Comcast, Warner Bros. Discovery and The Walt Disney Company).**
- **The top 10 VOD groups in Europe represent 10% of the total VOD services and VSP offering in Europe.**

US share among top 10 VOD group services portfolio | Dec. 2025 - In number of services and %

Flag icons © Copyright Showeet.com
Source: European Audiovisual Observatory / MAVISE

Part II. Main players

Main players – Top 20

Main players – Ownership of top 20 TV and VOD players

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

- **Out of the top 20 TV and VOD players, the BBC is the only one in public ownership.**

Breakdown of top 20 TV and VOD players in Europe by ownership | Dec. 2025 – In %

Top private players

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

Top public players

BBC

Source: European Audiovisual Observatory / MAVISE

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

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

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

Top 20 TV and VOD players by number of presences in markets* | Dec. 2025

Rank	Company	# Markets
1	Warner Bros. Discovery (US)	45
2	The Walt Disney Company (US)	44
3	Netflix (US)	41
4	Comcast (US)	40
5	Paramount Skydance (US)	40
6	Mubi Inc (US)	38
7	Rakuten Inc (JP)	37
8	Huawei (CN)	36
9	Apple Inc (US)	32
10	BBC (UK)	30

Rank	Company	# Markets
11	Canal + (FR)	30
12	Alphabet (US)	28
13	V World Holdings (UK)	28
14	Amazon (US)	26
15	Laliga Group International (ES)	25
16	AMC Networks Inc (US)	24
17	Microsoft Corporation (US)	20
18	PPF Group (CZ)	17
19	Antenna Group (GR)	15
20	Love TV Channels (ES)	15

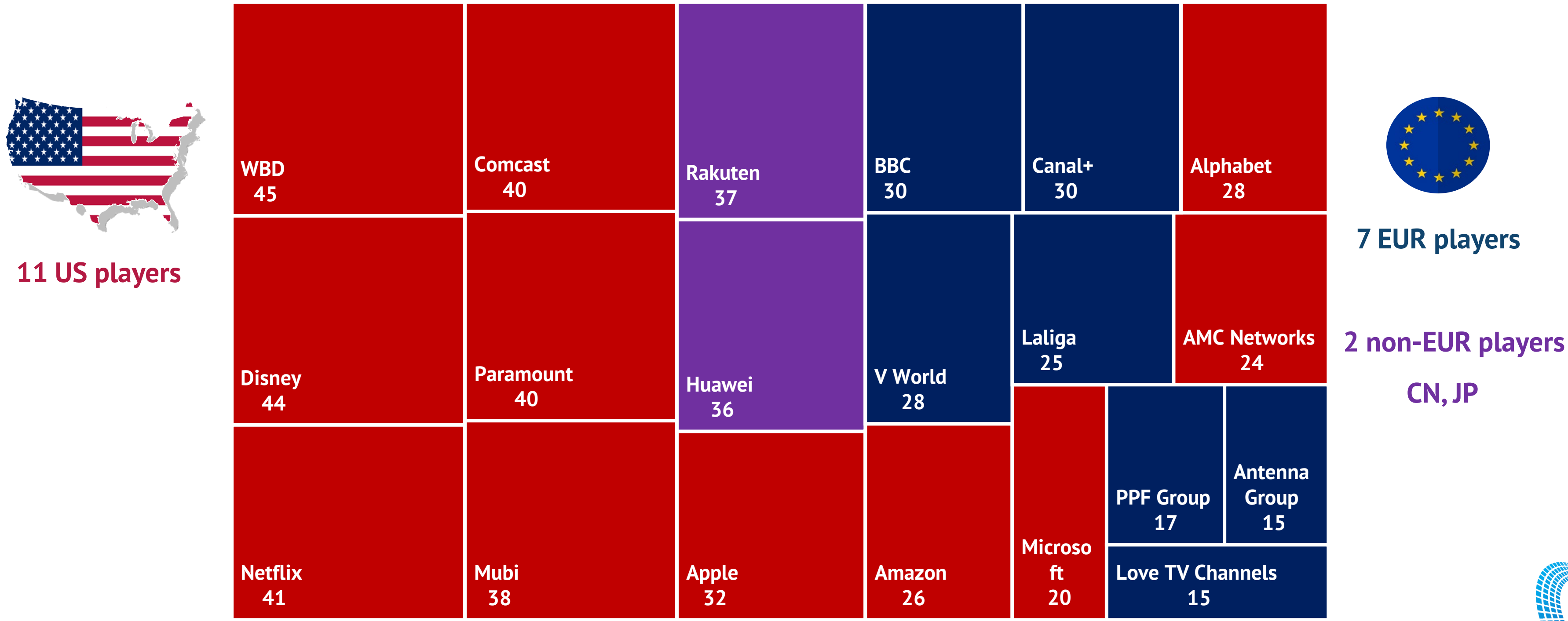
** Excluding non-EUR countries; including microstates; number of countries in which a group is present at least once; no doubling.*
Source: European Audiovisual Observatory / MAVISE

Main players – Origin of top 20 TV and VOD players

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

- **8 out of 10 of the most widespread TV and VOD groups in Europe are US-based.**
- **2 out of 20 top TV and VOD players are from Asia (Rakuten and Huawei).**

Origin of top 20 TV and VOD players in Europe | Dec. 2025 - In number of operating markets



Flag icons © Copyright Showeet.com / Source: European Audiovisual Observatory / MAVISE

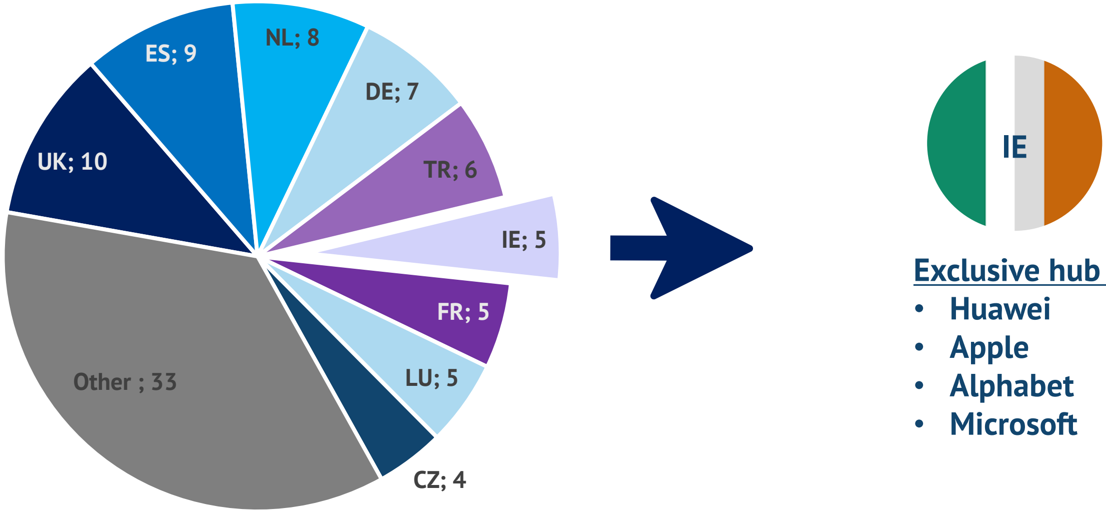
European Audiovisual Observatory

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

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

- **With 9 out of the 20 players, Spain is the biggest establishment hub for top TV and VOD players in the EU.**
- **Four of the top 20 TV and VOD players use Ireland as their exclusive establishment hub. These are: Chinese Huawei and US players Apple, Alphabet and Microsoft.**

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



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

Flag icons © Copyright Showeet.com
Source: European Audiovisual Observatory / MAVISE

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

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

- **Warner Bros. Discovery, Disney and Comcast are multi-brand players, equally driven by TV and VOD presences.**
- **Netflix is a single-brand player whose presence is typically driven by VOD markets.**
- **Paramount is a multi-brand players with an emphasis on TV market presences.**

Top 5 TV and VOD players by number of presences in markets* | Dec. 2025

	Company	No. markets* TV+VOD | TV | VOD	Main brands**
1	Warner Bros. Discovery (US)	**∑ 45 |** TV 44 **|** VOD 40	Animal Planet, Boomerang, Cartoon Network, Discovery, Eurosport, HBO MAX, ID, TLC
2	The Walt Disney Company (US)	**∑ 44 |** TV 42 **|** VOD 40	24 Kitchen, Disney Channel, ESPN, FX, National Geographic, Disney+
3	Netflix (US)	**∑ 41 |** TV -- **|** VOD 41	Netflix
4	Comcast (US)	**∑ 40 |** TV 38 **|** VOD 37	13th Street, E! Entertainment, Sky, Hayu
5	Paramount Skydance (US)	**∑ 40 |** TV 40 **|** VOD 11	Comedy Central, MTV, Nick Junior, Nickelodeon, Pluto TV, Paramount+

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

European Audiovisual Observatory

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

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

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

Top 6-10 TV and VOD players by number of presences in markets* | Dec. 2025

	Company	No. markets* TV+VOD | TV | VOD	Main brands**
6	Mubi Inc (US)	**∑ 38 |** TV -- **|** VOD 38	Mubi
7	Rakuten Inc (JP)	**∑ 37 |** TV 17 **|** VOD 37	Rakuten TV
8	Aspiegel (IE) / Huawei (CN)	**∑ 36 |** TV -- **|** VOD 36	Huawei Video
9	Apple Inc (US)	**∑ 32 |** TV -- **|** VOD 32	Apple TV
10	BBC (UK) / State of United Kingdom	**∑ 30 |** TV 28 **|** VOD 8	BBC Brit, BBC Earth, BBC First, Cbeebies, BBC iPlayer, Britbox International

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

European Audiovisual Observatory

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

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

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

Top 11-15 TV and VOD players by number of presences in markets* | Dec. 2025

	Company	No. markets* TV+VOD | TV | VOD	Main brands**
11	Groupe Canal Plus (FR)	**∑ 30** | TV 28 | VOD 14	Canal+, Canal+ Sport, Filmbox+
12	Alphabet (US)	**∑ 28** | TV -- | VOD 28	Google TV/Play, YouTube Movies and TV
13	Viasat World / V World Holdings (UK)	**∑ 28** | TV 28 | VOD 2	Epic Drama, TV1000, Viasat
14	Amazon (US)	**∑ 26** | TV 2 | VOD 26	Amazon Prime Video
15	Laliga (ES)	**∑ 25** | TV 25 | VOD 25	LaLiga TV, LaLiga+

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

European Audiovisual Observatory

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

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

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

Top 16-20 TV and VOD players by number of presences in markets* | Dec. 2025

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

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

European Audiovisual Observatory

Main players – Case studies

Huawei (HQ in China)

Huawei is based in one main country, Ireland, and serves 36 European VOD markets

1 country of establishment*
Ireland

27 EEA markets
AT, BE, CY, CZ, DE, DK, EE, ES, FI,
FR, GR, HR, HU, IE, IS, IT, LT, LU, LV
MT, NL, NO, PL, PT, SE, SI, SK

9 other European markets
AL, AM, BA, CH, MD, MK, TR, UA, UK

Map of Europe © Copyright Showeet.com
Source: European Audiovisual Observatory / MAVISE / Dec. 2025

Viasat World (HQ in UK)

Viasat World is based in a limited number of countries, from where it serves 28 European TV and VOD markets

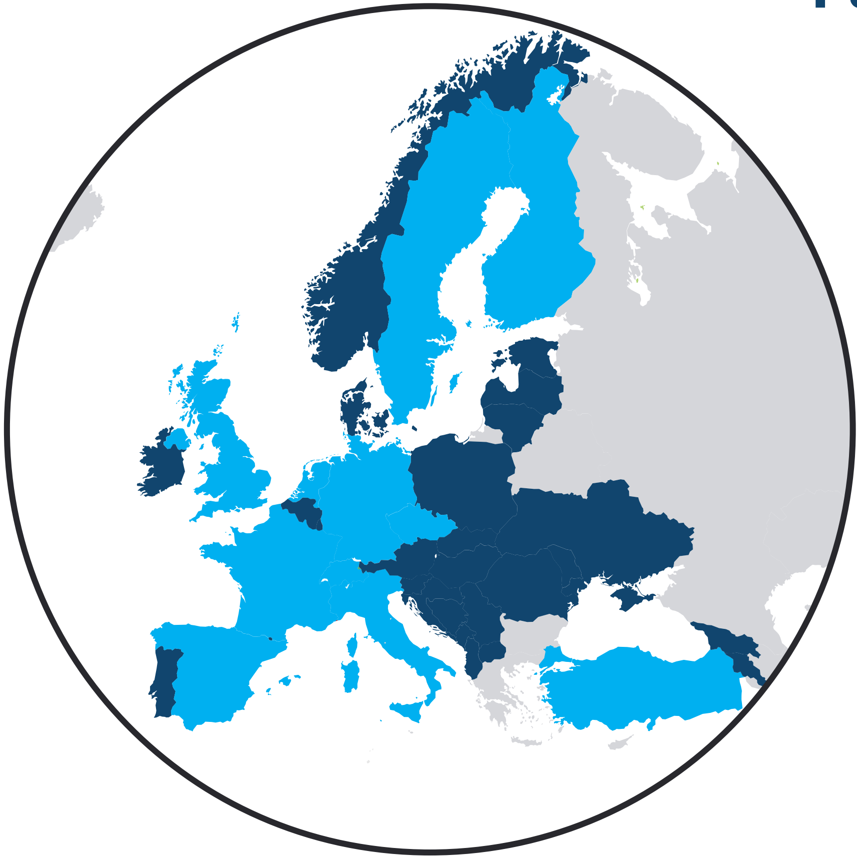
4 countries of establishment
EE, GR, UK, SE

19 EEA markets
BG, CY, CZ, DE, DK, EE, FI, FR, GR, HR, HU, LT, LV, NO, PL, RO, SE, SI, SK

9 other European markets
AL, BA, MD, ME, MK, RS, TR, UA

European Audiovisual Observatory

Map of Europe © Copyright Showeet.com
Source: European Audiovisual Observatory / MAVISE / Dec. 2025



Paramount Skydance (HQ in US)

Paramount Skydance is based in several countries, from where it serves 40 European TV and VOD markets

11 countries of establishment
CH, CZ, DE, ES, FI, FR, IT, NL, SE, TR, UK

26 EEA markets
AT, BE, BG, CZ, DE, DK, EE, ES, FI, FR, HR, HU, IE, IT, LT, LU, LV, MT, NL, NO, PL, PT, RO, SE, SI, SK

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

** Incl. microstates.*

Map of Europe © Copyright Showeet.com
Source: European Audiovisual Observatory / MAVISE / Dec. 2025

European Audiovisual Observatory

Audiovisual media services in Europe – 2025 data
European Audiovisual Observatory, Strasbourg, 2026

Author – Jean-Augustin Tran
Press and Public Relations – Alison Hindhaugh, alison.hindhaugh@coe.int, European Audiovisual Observatory

Publisher – European Audiovisual Observatory, 76, Allée de la Robertsau, 67000 Strasbourg, France
Tel. : +33 (0)3 90 21 60 00
www.mavise.obs.coe.int
www.obs.coe.int

Cover layout – ALTRAN, France
Maps of Europe and flag icons - © Copyright Showeet.com

Please quote this publication as:
Tran J-A. Audiovisual media services in Europe – 2025 data. European Audiovisual Observatory, Strasbourg, 2026