



# Trends in the circulation of TV channels and on-demand services in Europe

Gilles Fontaine

*Head of Department for Information on Markets and Financing  
European Audiovisual Observatory*

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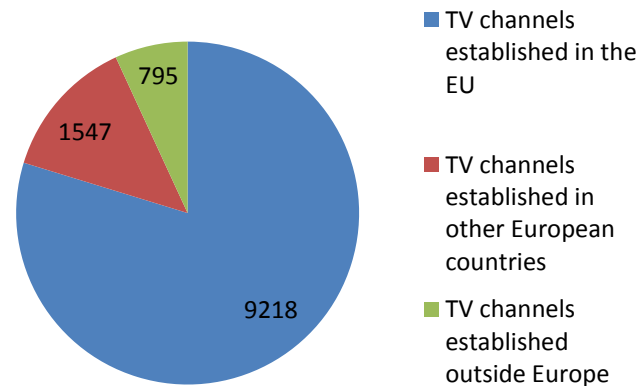
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# TV channels: the landscape in Europe

- **Over 11 000 TV channels available in Europe**
- **Local channels account for more than 50% of TV channels**
- **Over 90% are established in Europe**
- **13% are public channels**

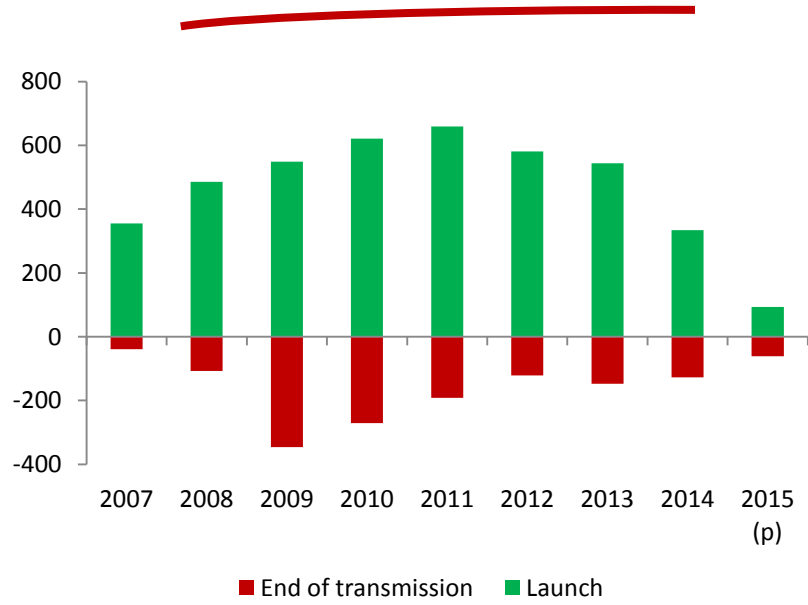
## MAVISE TV channels by region of establishment



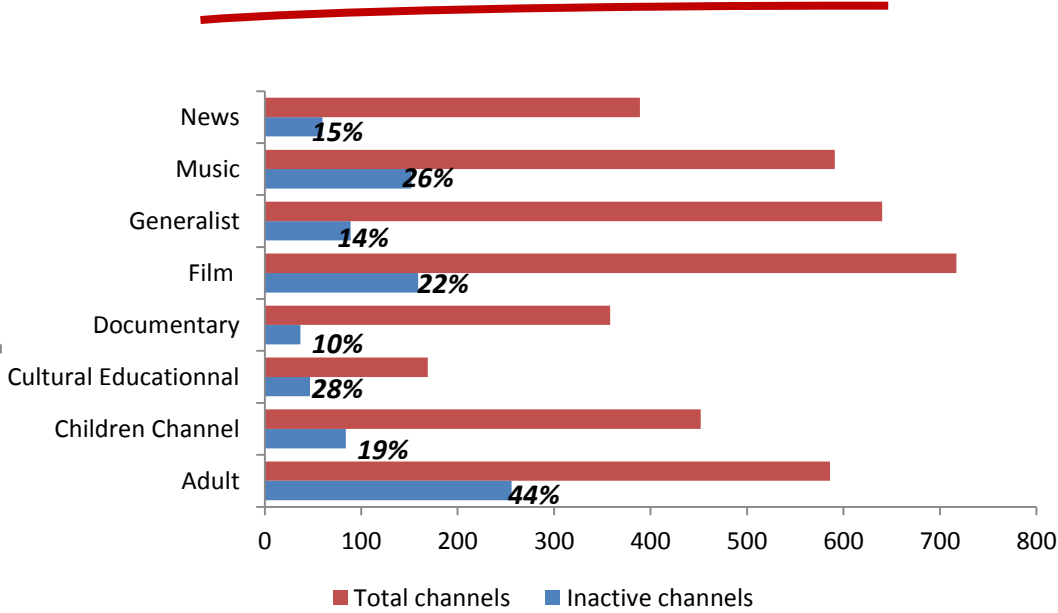
# Growth in TV channels driven by HD

- The number of TV channels is still increasing
- But the main driver is now the launch of HD versions

### Net addition of TV channels



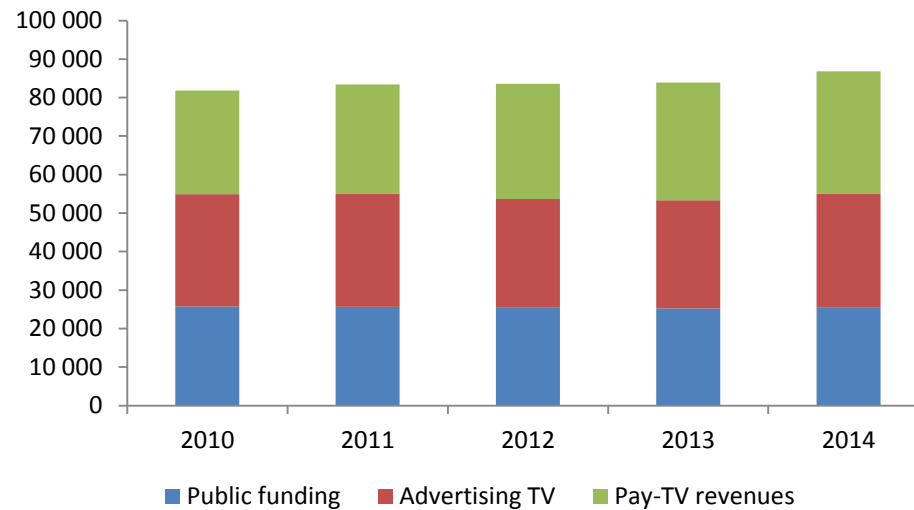
### Mortality rate of TV channels by genre



# In contrast, signs of maturity of the final market

- Advertising is at most stagnating
- Public funding under pressure
- Pay-TV still growing. How far ?

## Television market in the EU

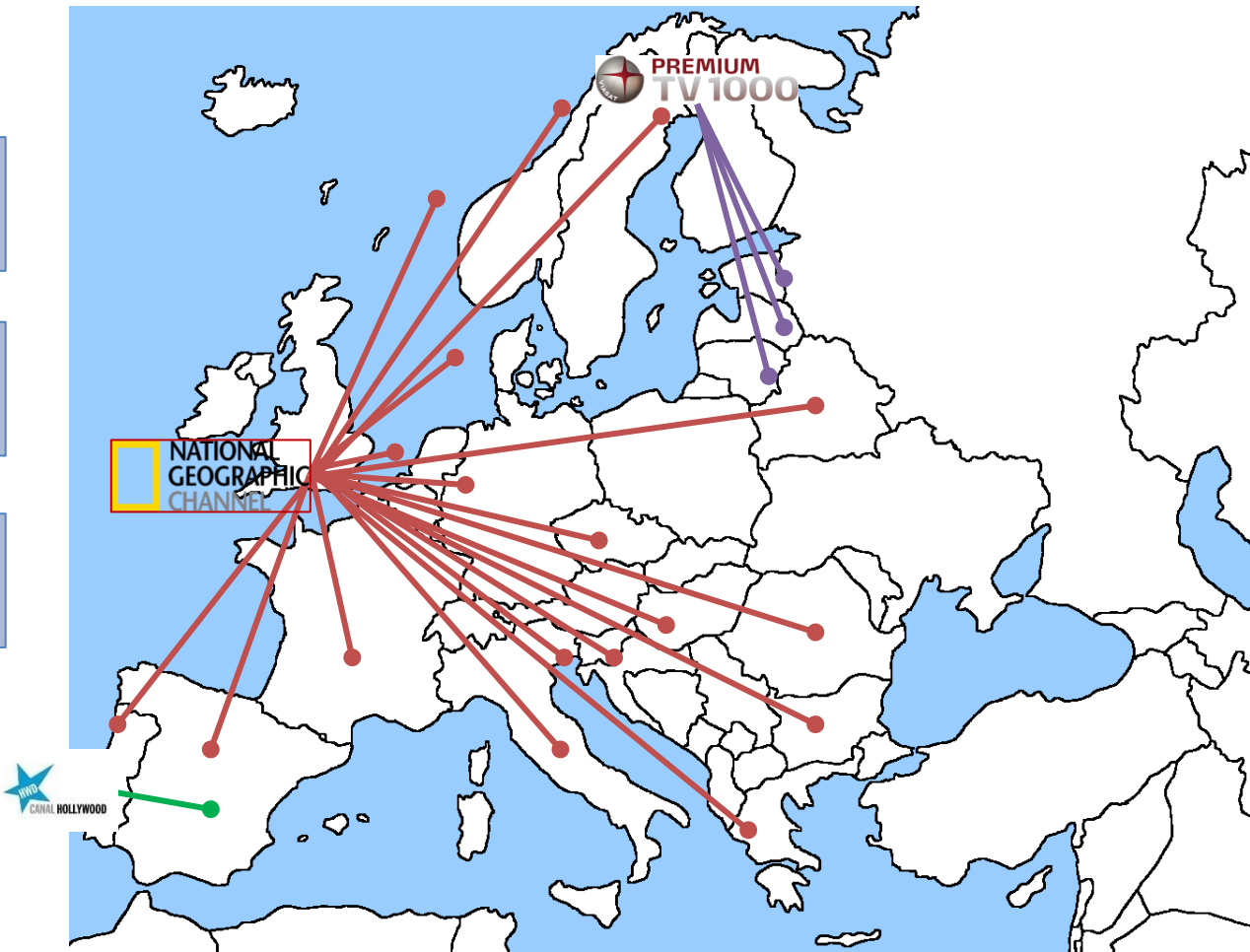


# An increasing circulation of TV channels...

25 versions of Discovery Channel.

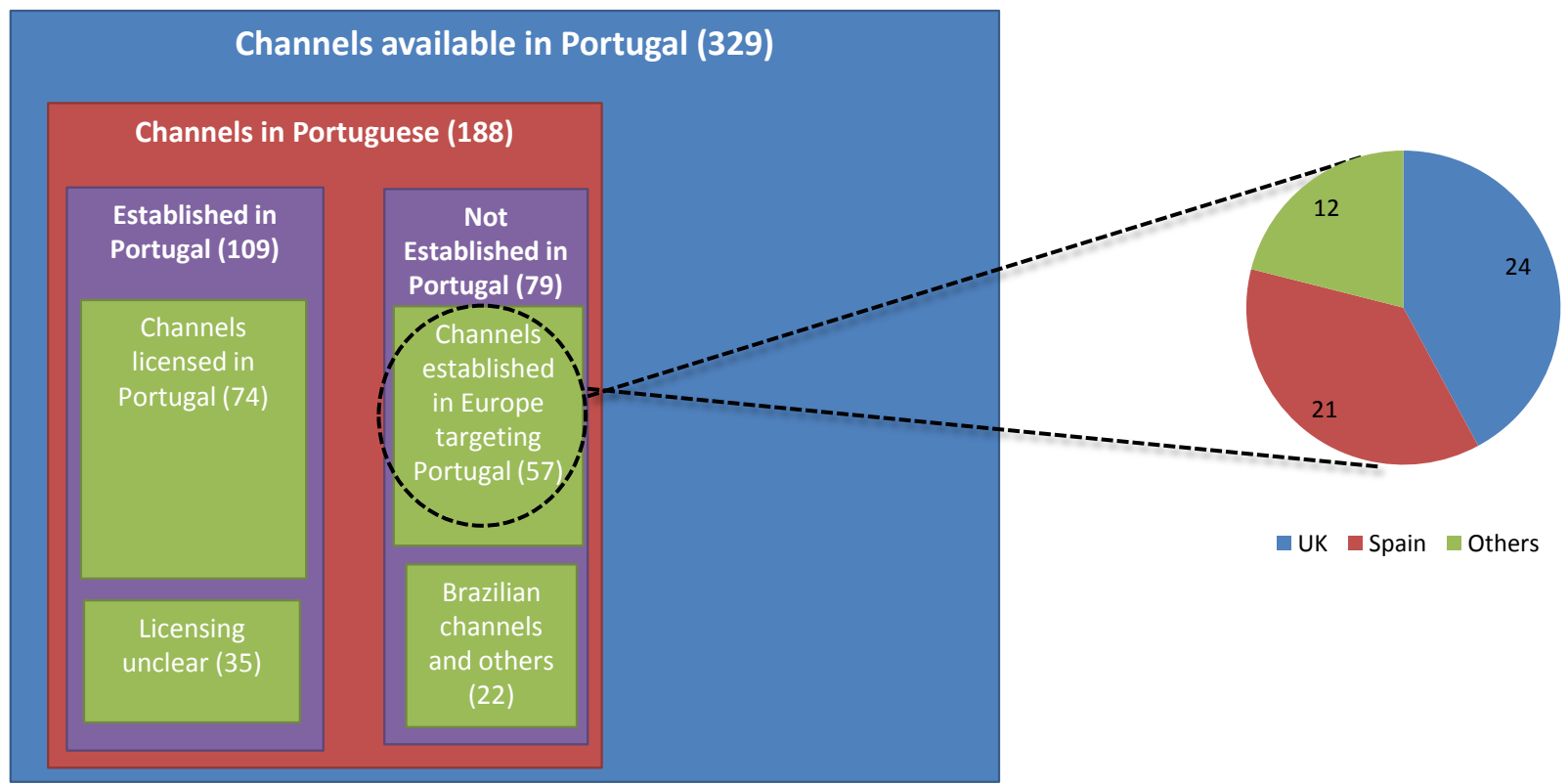
20 versions of CBS Reality.

16 versions of Eurosport.



# ...leads to an increasing number of available channels

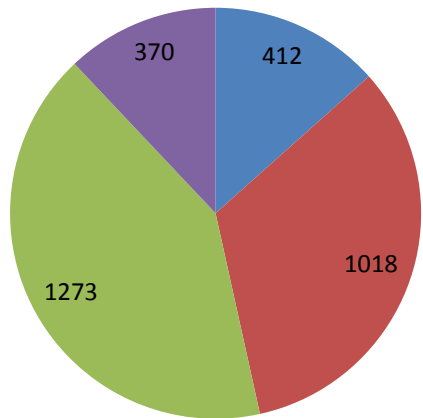
- The majority of TV channels available on average in a given country are foreign
- Among these foreign channels, a rapidly increasing share specifically targets the country



# Development of on-demand services led by pay-VOD and catch-up

- Number of (S)VOD services rapidly growing
- Catch-up services a “must-have” for TV channels

## On-demand services in MAVISE

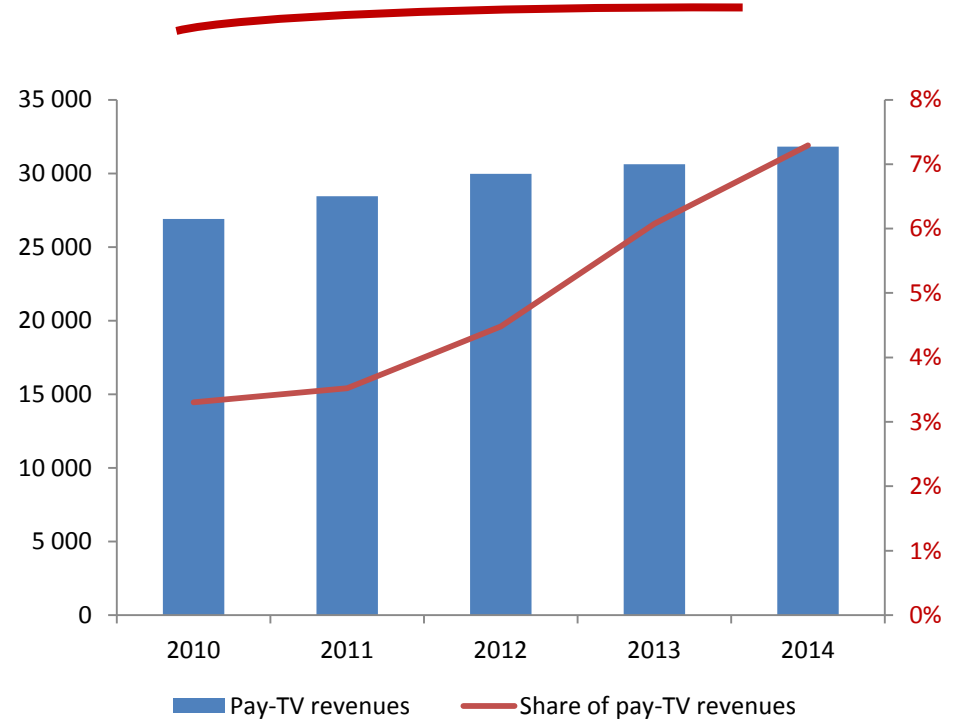


■ Branded Channels ■ Catch-up TV service ■ VOD ■ Others

# But VOD still less than 10% of pay-TV revenues

- VOD both a substitute of physical video and a competitor to pay-TV
- Will SVOD extent the global pay-TV market or destroy value ?

### The VOD market in the EU and share of pay-TV revenues

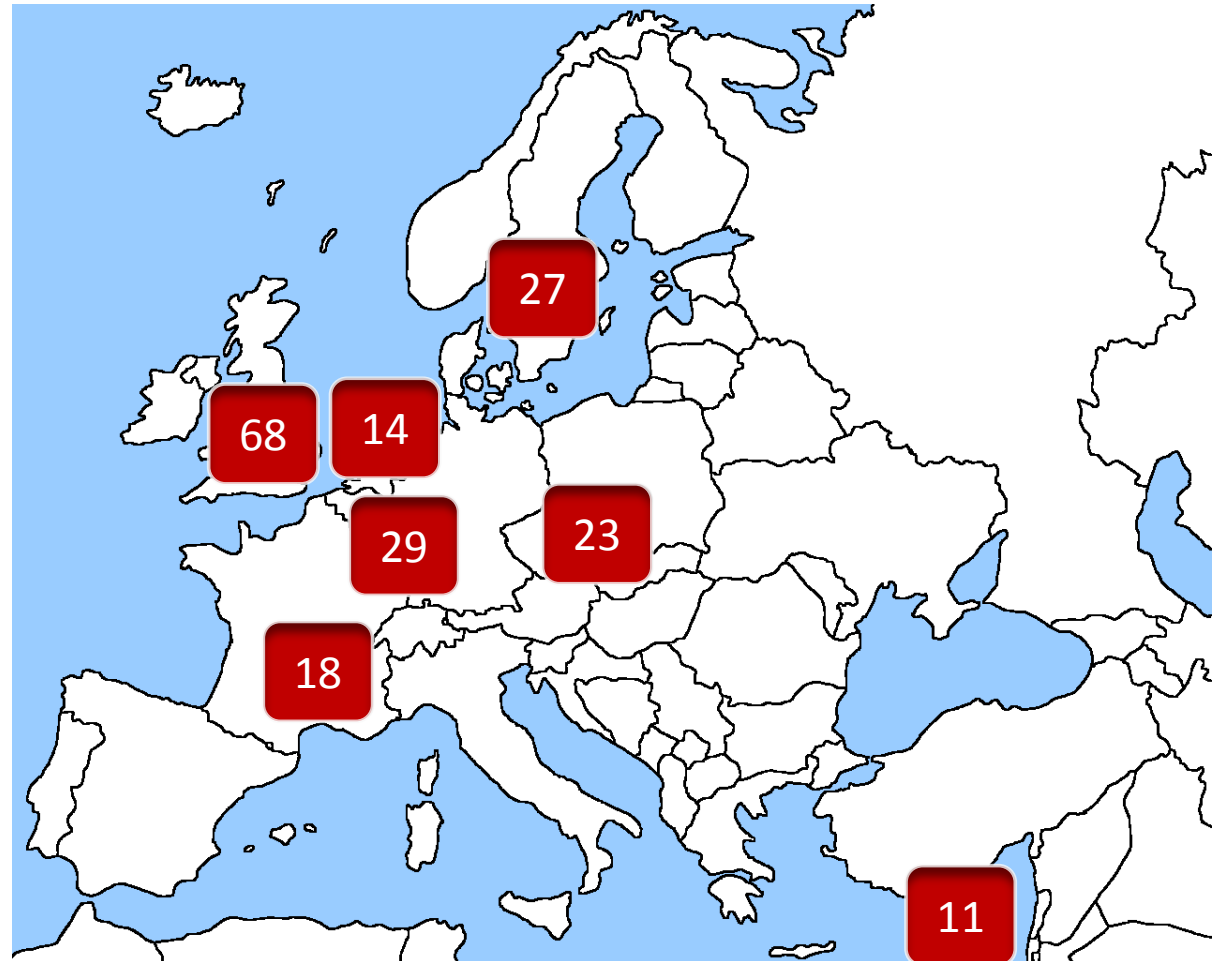




## On-demand services also circulate all over Europe

Netflix from NL. iTunes from LU . HBO from CZ. Disney, Discovery, Sony from GB

On-demand services  
targeting other countries



**A risk of “oversupply” of TV channels ?**

**Is it possible to efficiently serve a country from abroad ? For advertising-funded channels ?**

**For pay-TV channels ?**

**Is OTT going to lead to an increasing circulation of TV services in Europe ?**

**How to keep track of audiovisual services circulating in Europe ?**

**Breakdown of MAVISE channels by status of registration**

