AV industry ownership in Europe

Concentration, origin, statute

62nd EPRA meeting
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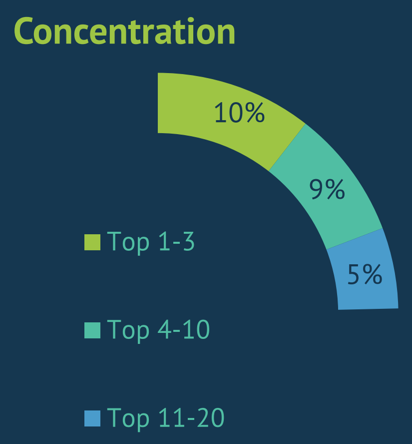
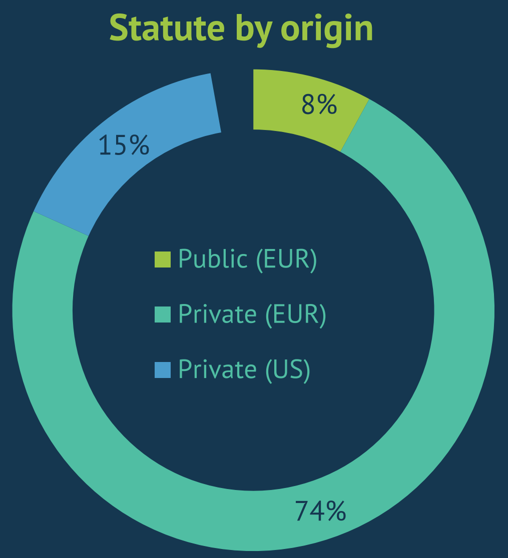
22-24 October 2025

European Audiovisual Observatory
COUNCIL OF EUROPE
CONSEIL DE L'EUROPE

25% of registered TV & VOD are owned by 20 AV service groups

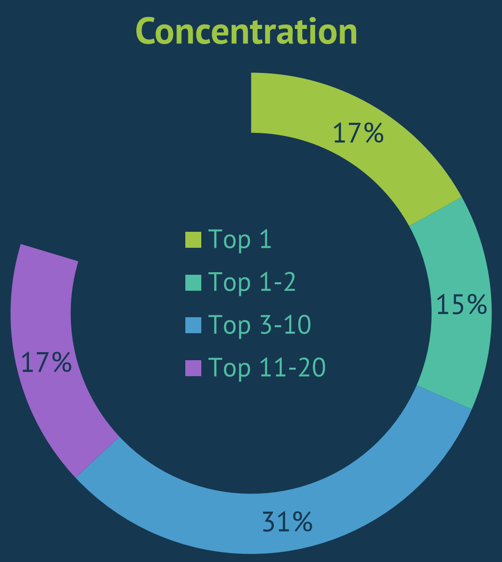
- The vast majority of registered AV services are owned by European players.
- US players own only 15% of services, but most of them appear in the top 20.

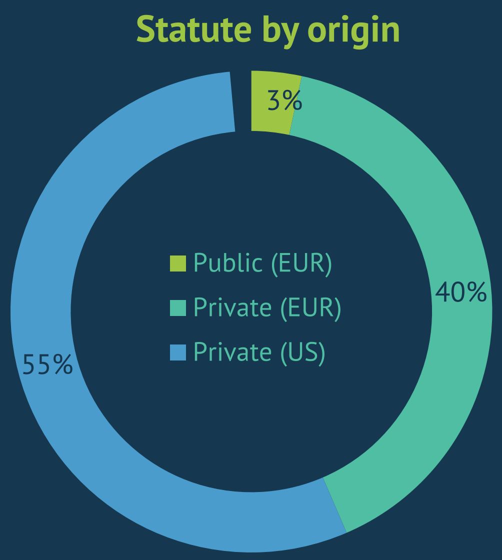




Top 20 Pay TV & SVOD players account for 80% of total pay AV service revenues

- The pay AV service market concentration by revenues is higher than the concentration by number of AV services.
- US backed-players account for more than half of pay TV & SVOD revenues.

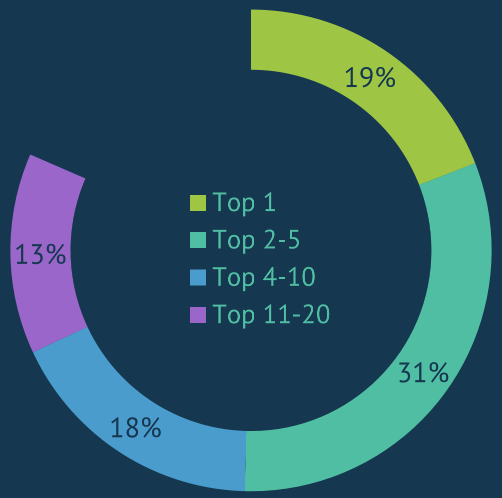




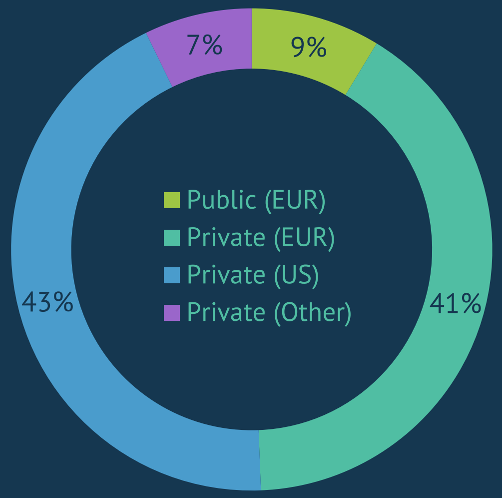
Top 20 TV & OTT advertising players make up over 80% of AV content advertising revenues

- The TV & OTT advertising market shows a similar level of concentration with the pay-AV services market.
- The biggest TV & OTT advertising private groups, are almost equally represented by both European and US players.

Concentration

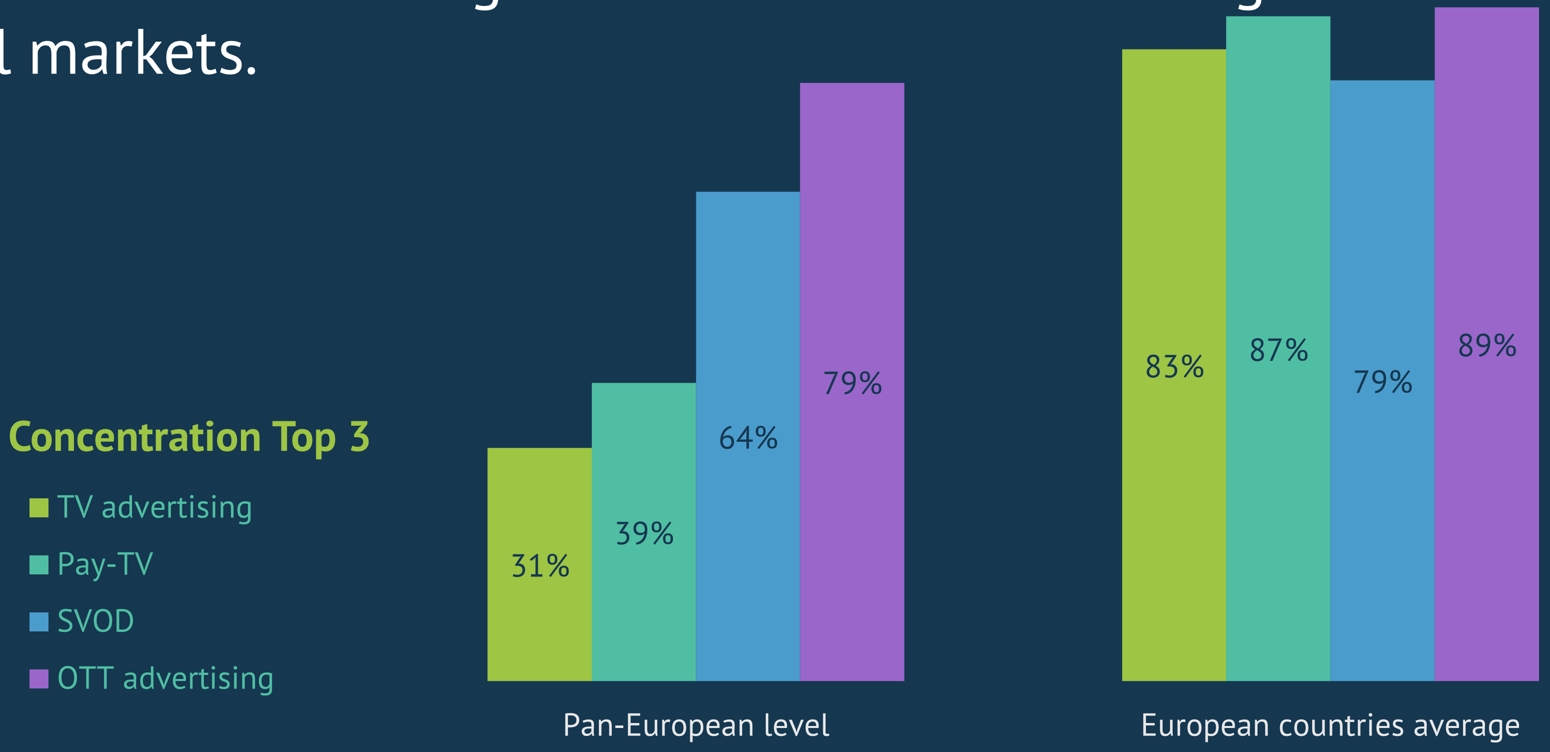


Statute by origin



National AV markets are more concentrated on average than the pan-European landscape

- Fewer players are present at country level.
- Top players present at country level tend to be the national groups depending on the segment.
- Concentration calculated as the average of national markets disregards the size of the individual markets.



THANK YOU!

MAVISE

Audiovisual media services in Europe – 2024 data

Top players in the European audiovisual industry – 2023 data

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