

Origin and availability of On -Demand services in the European Union

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Key Trends

- By the end of December 2014, 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.
- A total of 2563 on-demand audiovisual services were established in the European Union by the end of December 2014. 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 December 2014, and the top ten countries accounted for 77% of the same figure.
- 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 probably have a significantly higher market share than US players operating from the USA.



On Demand Audiovisual Media Services

The purpose of this note is to provide an overall background of the on-demand audiovisual media services landscape by focusing on a) the availability of services in the EU28 and b) on the country of origin of services.

1 Methodological Overview

This section provides a methodological overview of how the data in this note was collected, measured and categorised. The scope of the data includes all 28 EU member states.

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 1 : 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

When using the figures in the tables hereafter, the following should be taken into account:

- The comparison between 2013 and 2014 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 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.



2 On-demand audiovisual media services established in the 28 EU member states

The following table summarises the number of on-demand audiovisual media services established in the 28 EU member states in 2013 and 2014¹. A total of 2563 services were established in the European Union by the end of December 2014². As stated above, the comparison between 2013 and 2014 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. 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 likely to stabilise due to the consolidation of the market.

Table 2 : Number of on-demand audiovisual media services established in the EU 28

Country	TOTAL 2014	TOTAL 2013	2014 vs. 2013
AT	66	118	-44%
BE	92	115	-20%
BG	22	25	-12%
CY	22	22	0%
CZ	96	125	-23%
DE	274	330	-17%
DK	43	51	-16%
EE	11	14	-21%
ES	97	109	-11%
FI	25	28	-11%
FR	412	434	-5%
GB	515	682	-24%
GR	35	39	-10%
HR	14	16	-13%
HU	78	90	-13%
IE	23	26	-12%
IT	96	151	-36%
LT	14	15	-7%
LU	113	121	-7%
LV	19	21	-10%
MT	4	8	-50%
NL	110	120	-8%
PL	107	112	-4%
PT	39	40	-3%
RO	40	52	-23%
SE	144	153	-6%
SI	19	20	-5%
SK	33	51	-35%
Total EU	2563	3088	-17%

Source: European Audiovisual Observatory

¹ The comparison between 2013 and 2014 is only indicative as the perimeter of on-demand services tracked in MAVISE has evolved, in particular as regards the local catch-up and branded channels on YouTube which are no longer included.

² This includes services established in the EU 28 countries that target non-European countries.



Concentration of on-demand audiovisual media services

The following table shows the concentration of on-demand audiovisual media services among the EU 28 countries³. 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 2014, and the top ten countries accounted for 77% of the same figure.

Table 3 : Concentration of on-demand audiovisual media services established in the EU 28 - 2014

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 EU	2563	100%	100%

Source: European Audiovisual Observatory

³ 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.

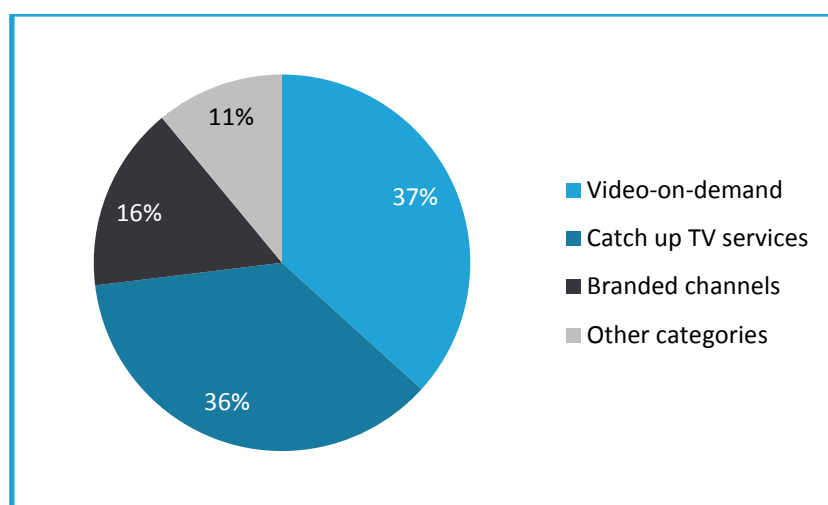


Categories of on-demand audiovisual media services established in a country

The figure below and table overleaf provide a breakdown of on-demand audiovisual media services established in the EU 28 by category of services in 2014⁴. 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 services⁵. 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.

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.

Figure 1 : Breakdown of on-demand audiovisual media services established in the EU 28 by category of services – 2014



Source: European Audiovisual Observatory

⁴ For a definition of categories of services please see section "Methodological overview"

⁵ As stated before, VoD and catch-up TV services are easier to track than the other categories of services.



Table 4 : Breakdown of on-demand audiovisual media services established in the EU 28 by category of service and by country in 2014

Country	Video-on-demand	Branded channels on open platforms	Catch up TV services	News / Portals	Film/TV archives	Sport events	Film trailers	Various	TOTAL 2014
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



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

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. VoD services are those that grant pay-access to a catalogue of audiovisual works⁶. Hence, the figures below exclude, among others, catch-up TV and branded channels.

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).

Table 5 : Video-on-demand services established in the EU in 2014 primarily targeting another country⁷

Country	VoD services targeting primarily another EU country
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

Source: European Audiovisual Observatory

⁶ The figures also include a small number of free video-on-demand services such as Viewster.

⁷ Excludes adult services



3 The availability 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 2014 and the change in percent point difference. As noted before, the comparison between 2013 and 2014 figures 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 below illustrates the total number of on-demand audiovisual media services available by country in the 28 EU member states. By the end of December 2014, 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.

Table 6 : Number of on-demand audiovisual media services available by country in the EU 28

Country	TOTAL 2013	TOTAL 2014	2014 vs. 2013
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%
EUR 28 Average	145	127	-12%

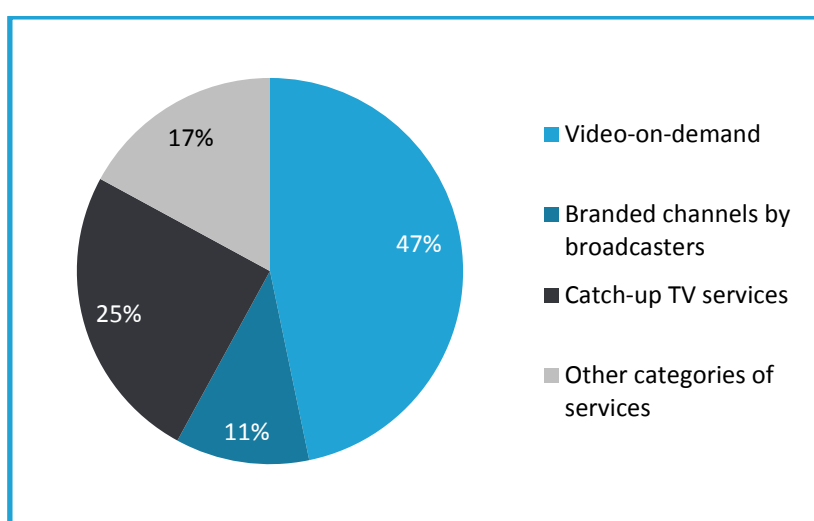
Source: European Audiovisual Observatory



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

The following table provides a breakdown of on-demand audiovisual media services available in the EU 28 by category of services⁸. The most significant categories of services are 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.

Figure 2 : Average breakdown of on-demand audiovisual media services available in an EU country by category of services – 2014



Source: European Audiovisual Observatory

⁸ For the definition of the categories of services, see section « Methodological overview »



Table 7 : Breakdown of on-demand audiovisual media services available in the EU 28 by category of service and by country in 2014

Country	VoD	Branded channels of broadcasters	Catch-up TV services	News	Portals	Archives	Sport events	Films trailers	Various	Total
AT	76	34	48	11	1	4	4	1	10	189
BE (CFB)	99	6	27	5	1	4	2	4	9	157
BE (DSG)	41	3	7	2		3	2	1	4	63
BE (VLG)	90	9	30	5	1	3	2	2	6	148
BG	14	1	13			1			1	30
CY	33	3	4	1		1	1		2	45
CZ	31	3	15	7	2	2	5	1	9	75
DE	161	56	110	6	2	6	5	9	12	367
DK	51	4	39	2	1	3	1	1	2	104
EE	12	4	16		1	3	1			37
ES	115	27	30	4	1	4	5	4	17	207
FI	81	2	26	1	1	4	2	1	2	120
FR	223	92	112	9	1	5	9	14	25	490
GB	225	45	56	14	1	7	16	3	27	394
GR	25	11	18	2	1	3		1	2	63
HR	11	3	6			1			1	22
HU	21	7	75	3		3			3	112
IE	87	14	22	4		4	4	1	9	145
IT	76	22	40	9	5	5	4	4	13	178
LT	13	7	10		1	3	1			35
LU	42	2	7	4		3	2	3	5	68
LV	13	4	28		1	3	1			50
MT	27	1	2	1		1			2	34
NL	62	32	36	1	1	4	3	3		142
PL	57	21	54	1	1	7	1	1	6	149
PT	42	10	26		1	3			2	84
RO	12	9	26			3			1	51
SE	53	7	77	4		4	4	1	3	153
SI	39	2	9	1		2			3	56
SK	18	3	19	2	4	3	1		2	52
EUR 28	62	15	33	4	1	3	3	3	7	127

Source: European Audiovisual Observatory



4 The circulation of video-on-demand services in the EU 28

The following table and figures present figures for a sub-set of on-demand audiovisual media services available in the EU 28 and these are video-on-demand (VoD) services⁹. VoD services are those with 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.

A significant number of VoD services available in a given EU country are established in another country: on average, by December 2014, 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.

⁹ 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.

Table 8 : Breakdown of video-on-demand services available by country and by country of establishment in 2014¹⁰

Country	National	Established in another EU country	Established in the US ¹¹	Established in another country	Total of available VoD services	Share of EU cross-border services
Austria	11	25	39	5	80	31%
Belgium (VLG)	24	25	38	3	90	28%
Belgium (CFB)	17	37	41	5	100	37%
Belgium (DSG)	0	38	39	2	79	48%
Bulgaria	10	4	1	0	15	27%
Croatia	7	2	0	2	11	18%
Cyprus	8	5	20	2	35	14%
Czech Republic	27	4	1	0	32	13%
Denmark	14	21	17	2	54	39%
Estonia	3	6	1	3	13	46%
Finland	16	21	44	2	83	25%
France	114	31	74	9	228	14%
Germany	92	24	44	6	166	14%
Greece	6	6	21	2	35	17%
Hungary	8	14	0	2	24	58%
Ireland	9	20	57	5	91	22%
Italy	19	12	43	4	78	15%
Latvia	3	7	0	3	13	54%
Lithuania	5	7	0	3	15	47%
Luxembourg	5	14	21	4	44	32%
Malta	1	5	20	2	28	18%
Netherlands	26	15	22	3	66	23%
Poland	37	17	1	3	58	29%
Portugal	11	10	21	2	44	23%
Romania	5	5	1	2	13	38%
Slovakia	7	8	1	2	18	44%
Slovenia	9	8	21	2	40	20%
Spain	25	14	59	18	116	12%
Sweden	18	10	24	3	55	18%
United Kingdom	114	11	92	10	227	5%
EU 28 Average	22	14	25	4	65	22%

Source: European Audiovisual Observatory

¹⁰ 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.

¹¹ 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 the section on "2015 update on the US services".



National analysis of video-on-demand services available in a national market by country of origin

The following sub-section provides an overview of the video-on-demand (VoD) services available in the EU 28 by country of establishment on national level.

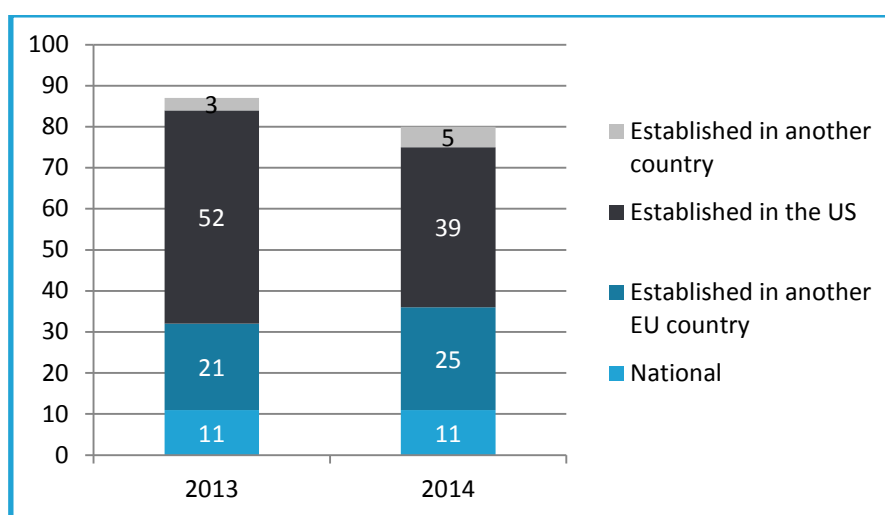
Please note that the comparison between 2013 and 2014 is only indicative as the perimeter of on-demand services tracked in MAVISE has evolved, in particular as regards the data cleaning of mainly US-based services and the de-activation of services that no longer exist (e.g. many micro-channels on YouTube were classified as VoD as they were paid services but several of these were shut down).

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 these figures are micro-channels on YouTube and niche services of sport leagues such as the National Hockey League (NHL), Major League Baseball (MLB) and World Wrestling Entertainment (WWE). In addition, the number of these services is set to be further reduced due to the methodological decision to only include one Xbox Video VoD service per country as opposed to counting several catalogues of studios on Xbox Video each as one distinct VoD service.

AT – Austria

- Most of the VoD services available in Austria are of US origin, followed by EU services in second and national services in third place.

Figure 3: Number of video-on-demand services available in Austria by country of establishment 2013/14



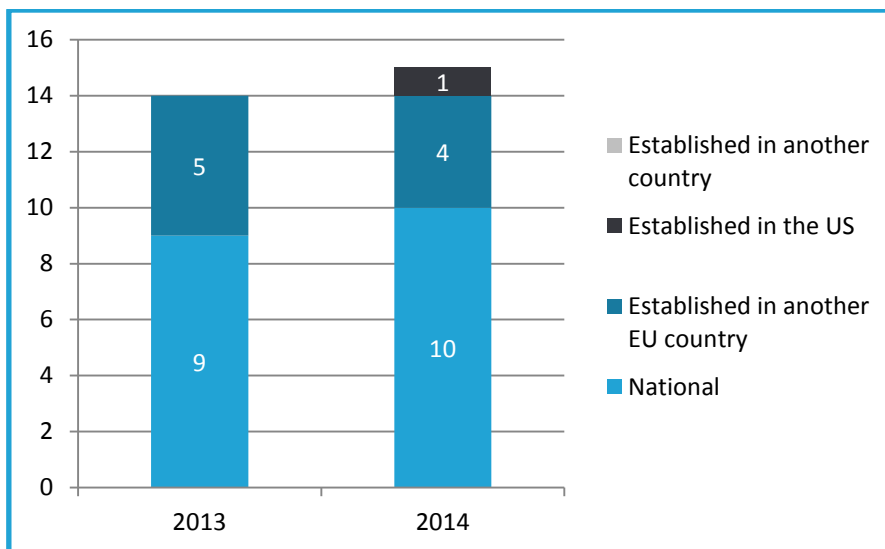
Source: European Audiovisual Observatory



BG – Bulgaria

- The majority of VoD services available in Bulgaria are of national and EU origin.

Figure 4: Number of video-on-demand services available in Bulgaria by country of establishment 2013/14

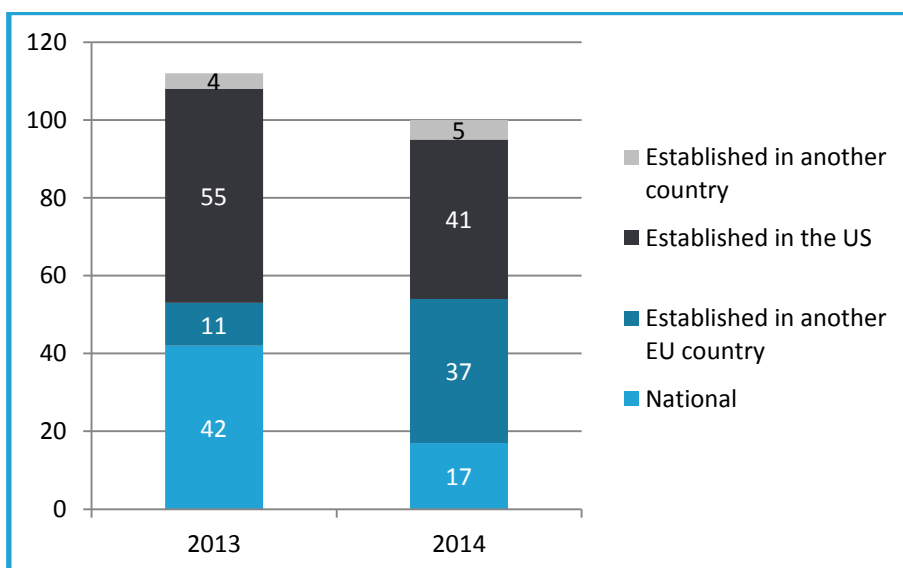


Source: European Audiovisual Observatory

BE – French Community of Belgium

- In 2014, US-based VoD services and those established in the EU were most prominent in the French Community of Belgium.

Figure 5: Number of video-on-demand services available in the French Community of Belgium by country of establishment 2013/14



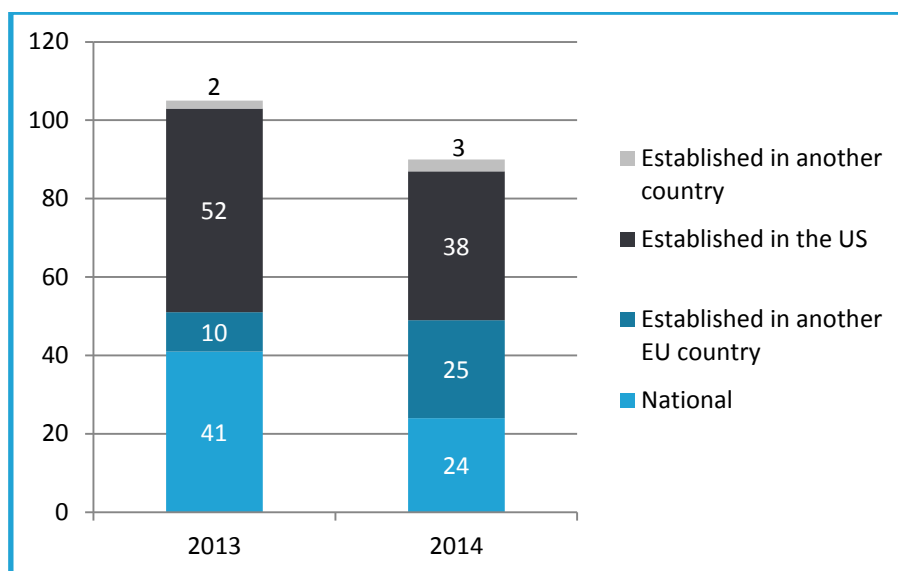
Source: European Audiovisual Observatory



BE – Flemish Community of Belgium

- The majority of VoD services available in the Flemish Community of Belgium are from the US, followed by services established in the EU and national services in second and third place.

Figure 6: Number of video-on-demand services available in the Flemish Community of Belgium by country of establishment 2013/14

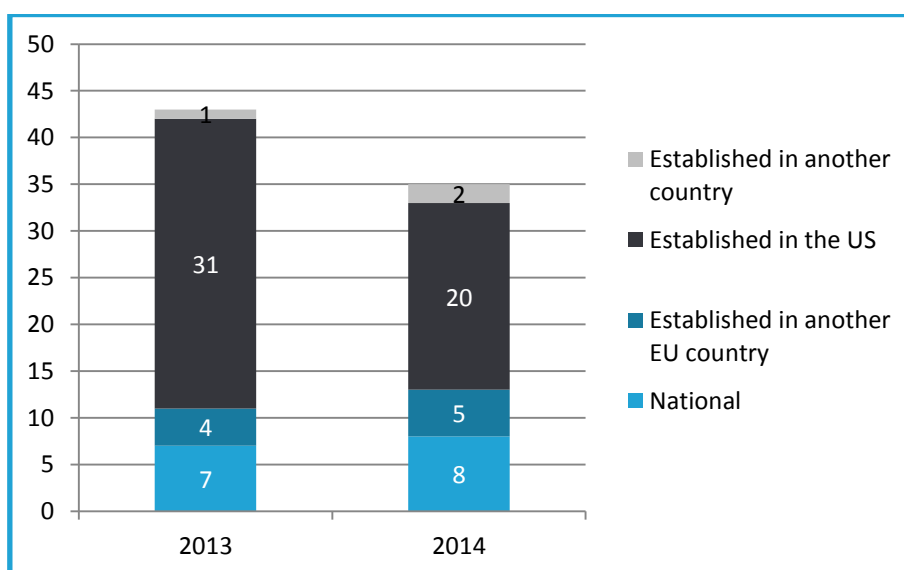


Source: European Audiovisual Observatory

CY – Cyprus

- The majority of VoD services available in Cyprus are established in the US.

Figure 7: Number of video-on-demand services available in Cyprus by country of establishment 2013/14



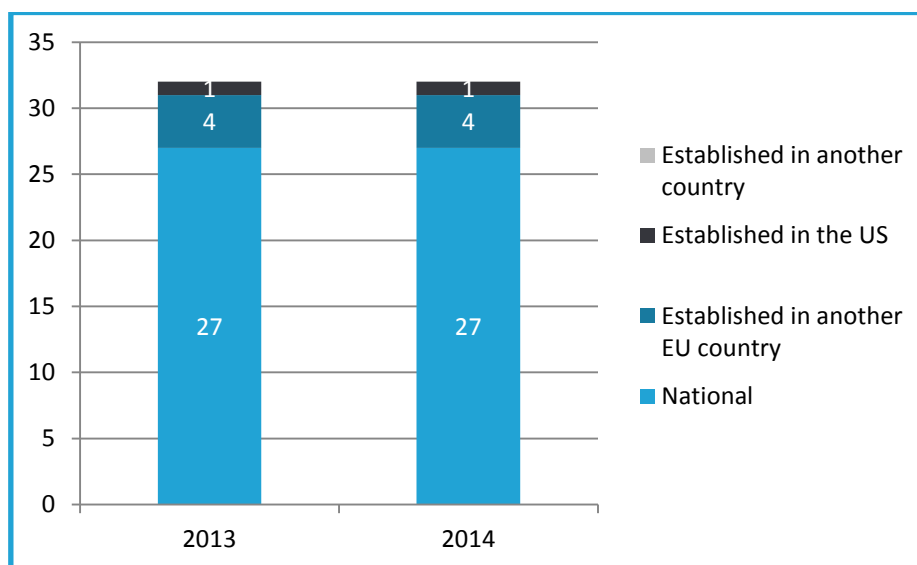
Source: European Audiovisual Observatory



CZ – Czech Republic

- The overwhelming majority of VoD services available in the Czech Republic were of national origin. The great majority of these nationally established VoD services (i.e. 24) target other countries (e.g. several VoD services by HBO are established in the country but are not under national control).

Figure 8: Number of video-on-demand services available in the Czech Republic by country of establishment 2013/14

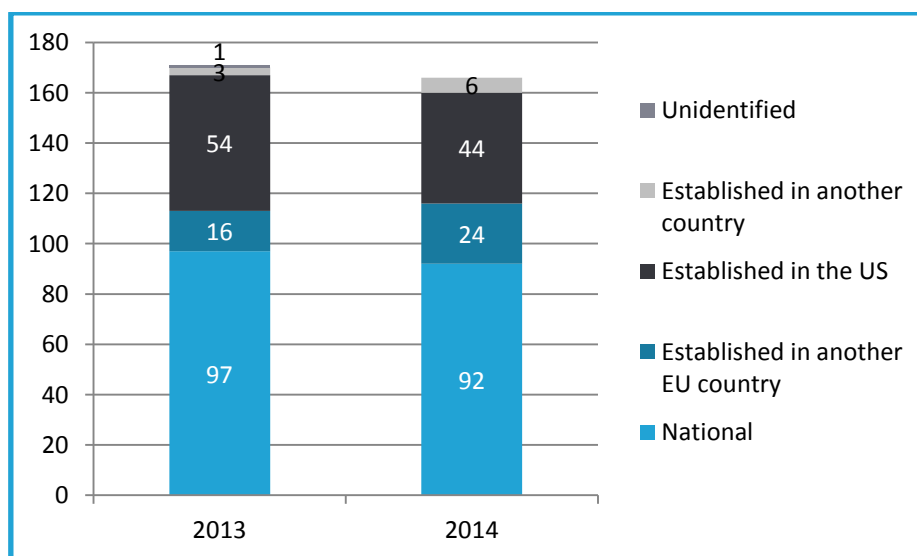


Source: European Audiovisual Observatory

DE – Germany

- The majority of VoD services available in Germany are established in the country.

Figure 9: Number of video-on-demand services available in Germany by country of establishment 2013/14



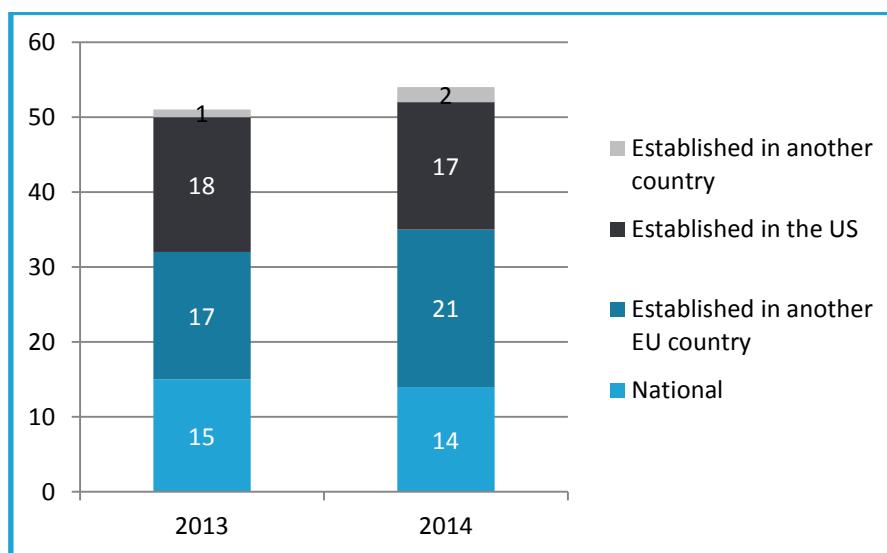
Source: European Audiovisual Observatory



DK – Denmark

- VoD services from other EU countries (e.g. mainly from Sweden) are most prominent in the Danish market, followed by US-based services in second and national services in third place. The number of VoD services available in Denmark that originates from other EU countries and the US is relatively balanced.

Figure 10: Number of video-on-demand services available in Denmark by country of establishment 2013/14

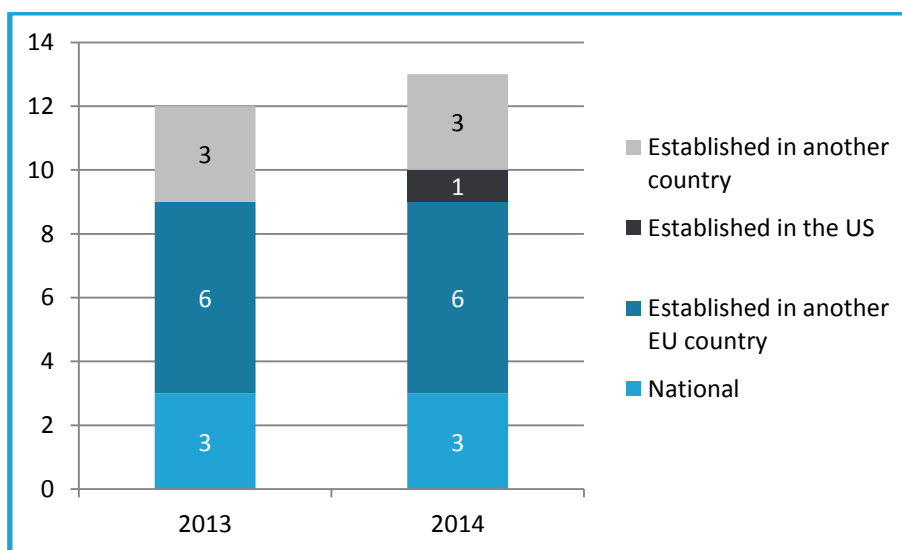


Source: European Audiovisual Observatory

EE – Estonia

- The large majority of VoD services available in Estonia are based in other EU countries.

Figure 11: Number of video-on-demand services available in Estonia by country of establishment 2013/14



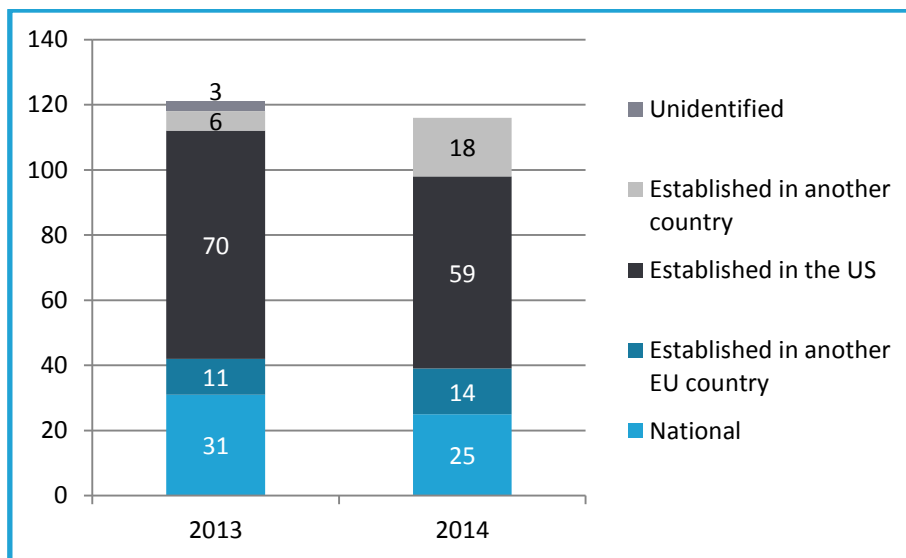
Source: European Audiovisual Observatory



ES – Spain

- The majority of VoD services available in Spain are US-based services.

Figure 12: Number of video-on-demand services available in Spain by country of establishment 2013/14

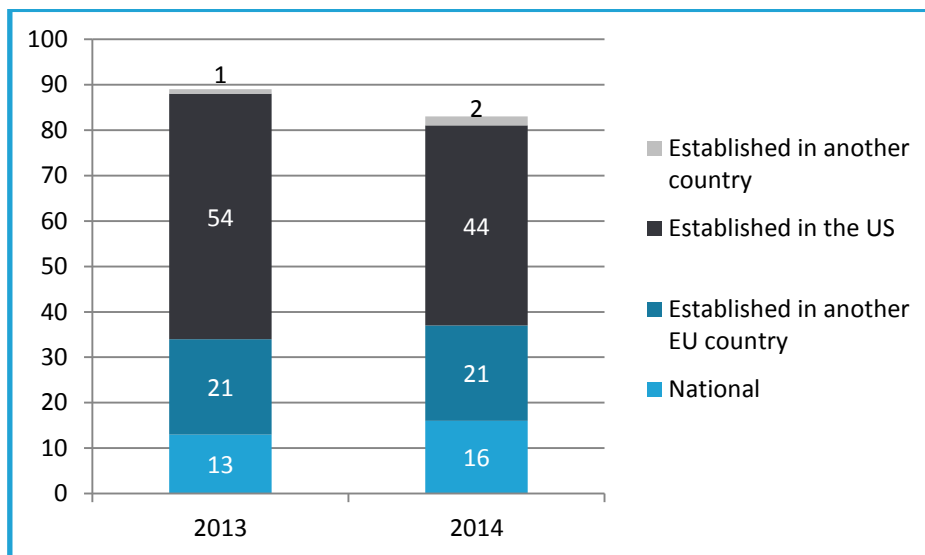


Source: European Audiovisual Observatory

FI – Finland

- The majority of VoD services available in Finland are of US origin.

Figure 13: Number of video-on-demand services available in Finland by country of establishment 2013/14



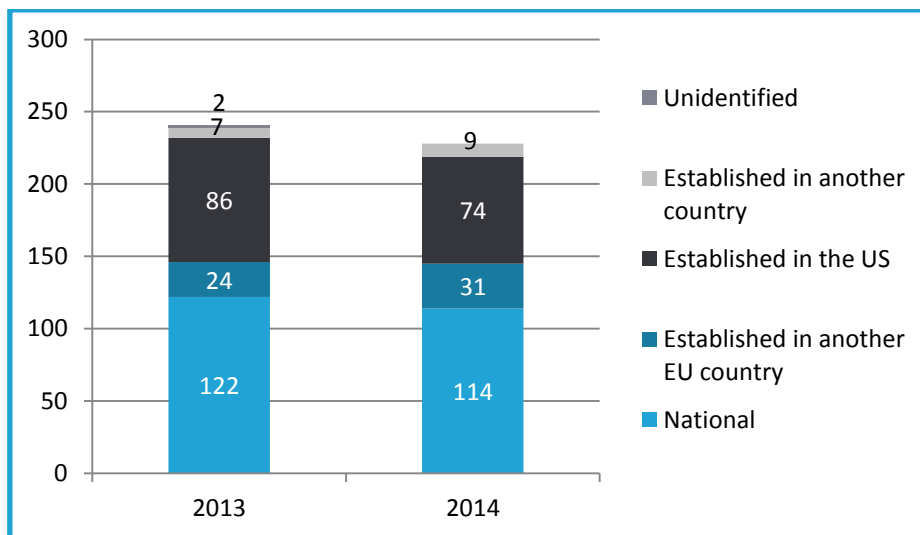
Source: European Audiovisual Observatory



FR – France

- The majority of VoD services available in France are established in the country. Approximately 1/5 of these services target other countries.

Figure 14: Number of video-on-demand services available in France by country of establishment 2013/14

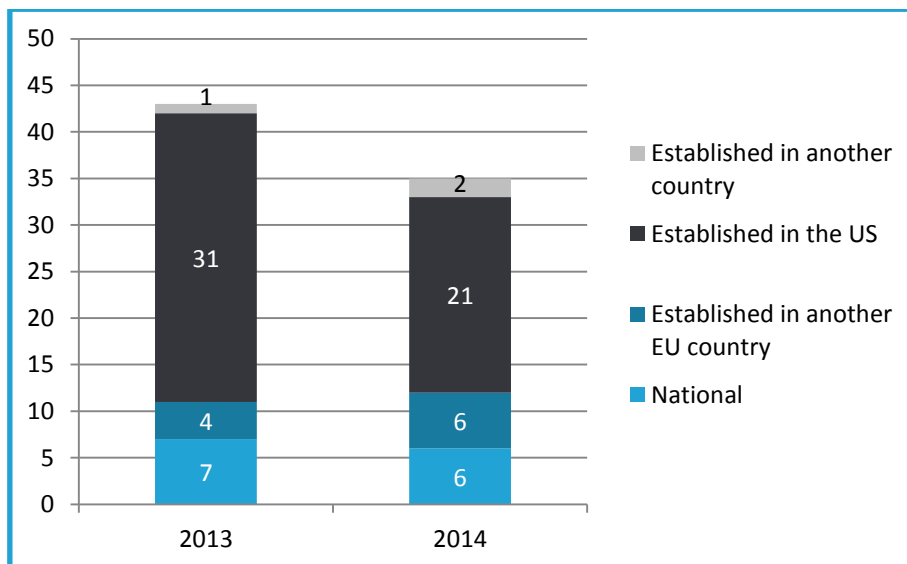


Source: European Audiovisual Observatory

GR – Greece

- The majority of VoD services available in Greece are established in the US.

Figure 15: Number of video-on-demand services available in Greece by country of establishment 2013/14



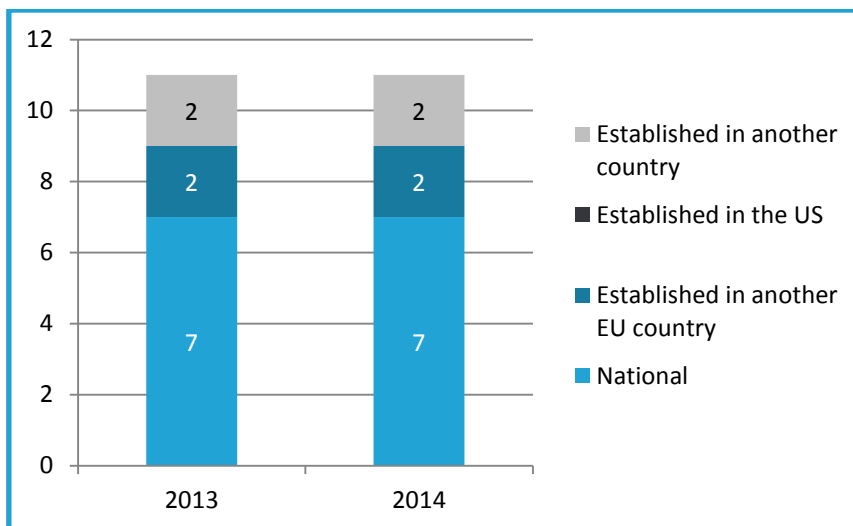
Source: European Audiovisual Observatory



HR – Croatia

- The majority of VoD services available in Croatia are national services.

Figure 16: Number of video-on-demand services available in Croatia by country of establishment 2013/14

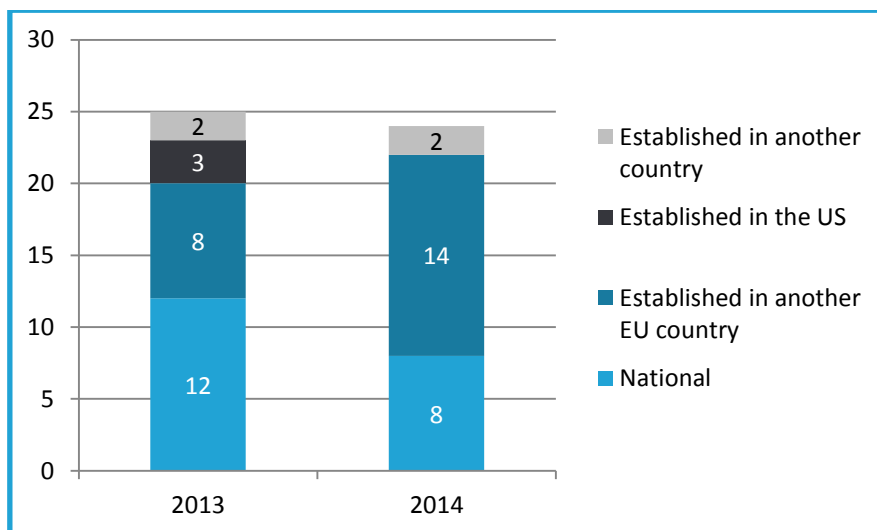


Source: European Audiovisual Observatory

HU – Hungary

- The majority of VoD services available in Hungary are established in the EU and on national level.

Figure 17: Number of video-on-demand services available in Hungary by country of establishment 2013/14



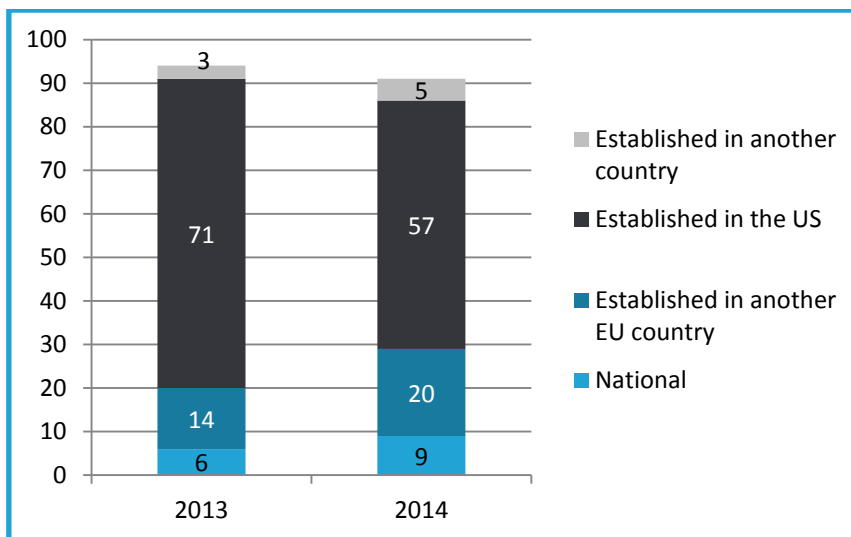
Source: European Audiovisual Observatory



IE – Ireland

- The great majority of VoD services available in Ireland are of US origin.

Figure 18: Number of video-on-demand services available in Ireland by country of establishment 2013/14

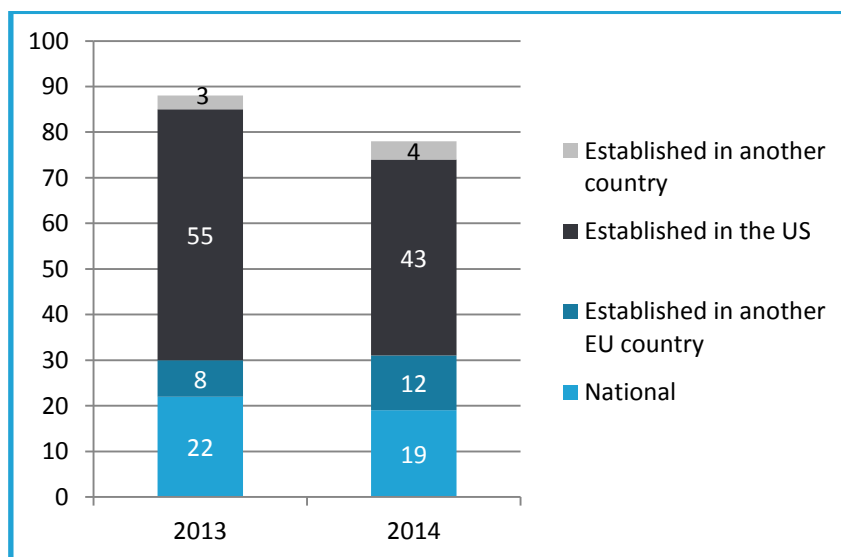


Source: European Audiovisual Observatory

IT – Italy

- The majority of VoD services available in Italy are established in the US.

Figure 19: Number of video-on-demand services available in Italy by country of establishment 2013/14



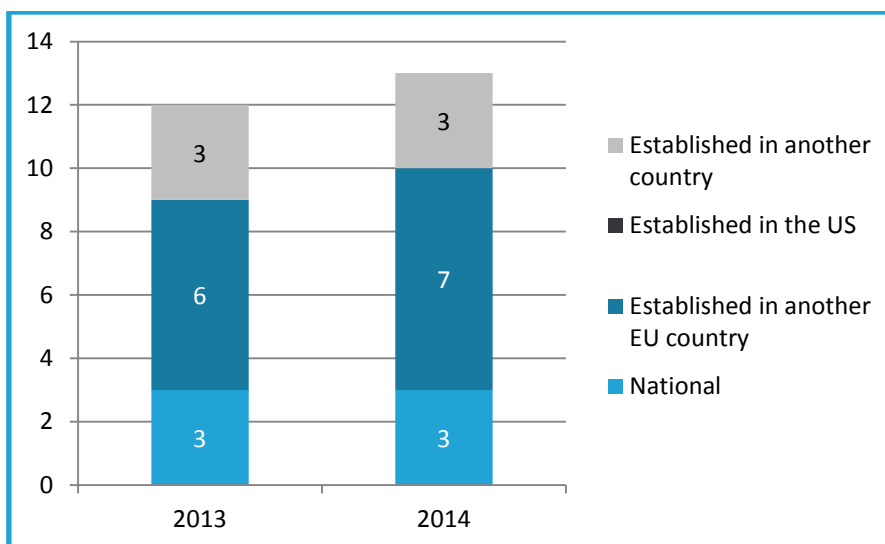
Source: European Audiovisual Observatory



LV – Latvia

- Most of the VoD services available in Latvia are from other EU countries or of national origin.

Figure 20: Number of video-on-demand services available in Latvia by country of establishment 2013/14

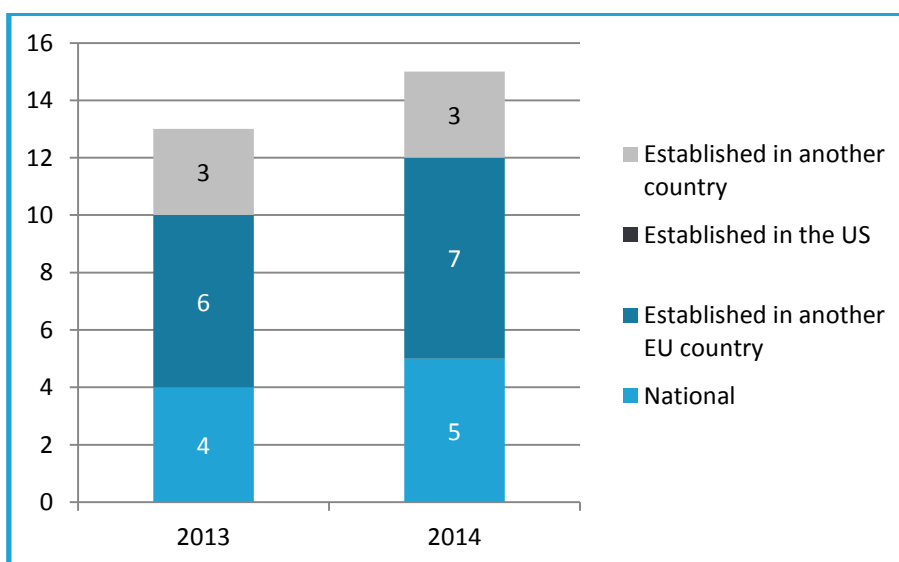


Source: European Audiovisual Observatory

LT – Lithuania

- Most of the VoD services that are available in Lithuania are of EU or national origin.

Figure 21: Number of video-on-demand services available in Lithuania by country of establishment 2013/14



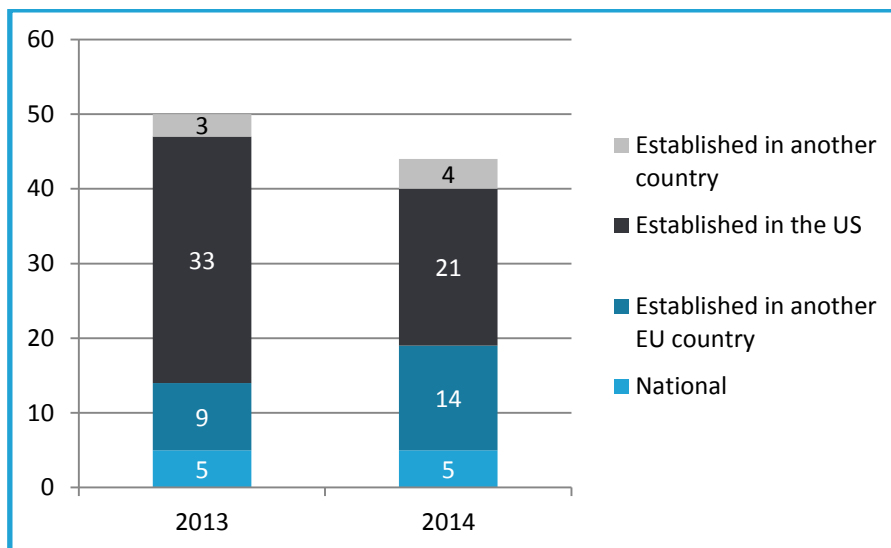
Source: European Audiovisual Observatory



LU – Luxembourg

- A large part of the VoD services available in Luxembourg are from the US. The country is home to the iTunes stores and Netflix (for 2013).

Figure 22: Number of video-on-demand services available in Luxembourg by country of establishment 2013/14

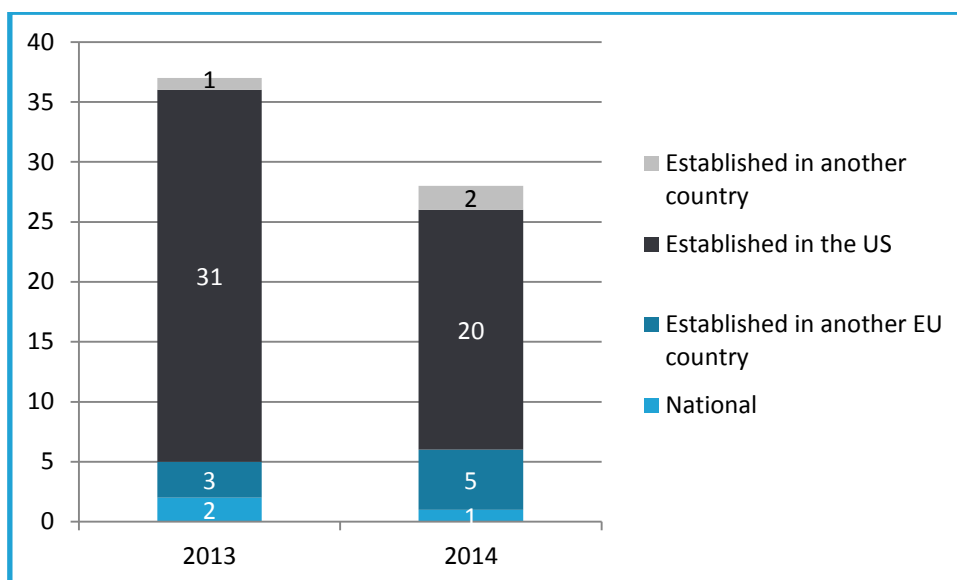


Source: European Audiovisual Observatory

MT – Malta

- The great majority of VoD services available in Malta are US-based.

Figure 23: Number of video-on-demand services available in Malta by country of establishment 2013/14



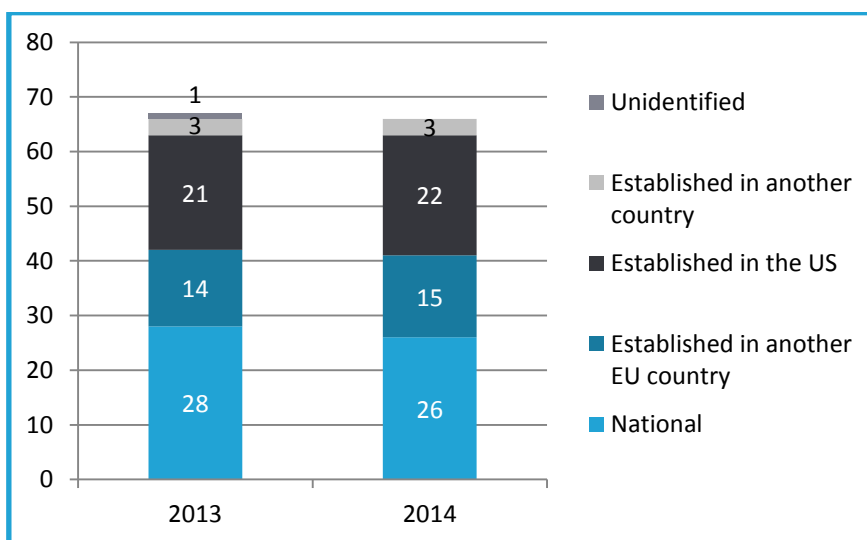
Source: European Audiovisual Observatory



NL – Netherlands

- The majority of VoD services available in the Netherlands are of national origin and half of these (e.g. 13) target other countries. In 2014, Netflix moved its headquarter from Luxembourg to the Netherlands.

Figure 24: Number of video-on-demand services available in the Netherlands by country of establishment 2013/14

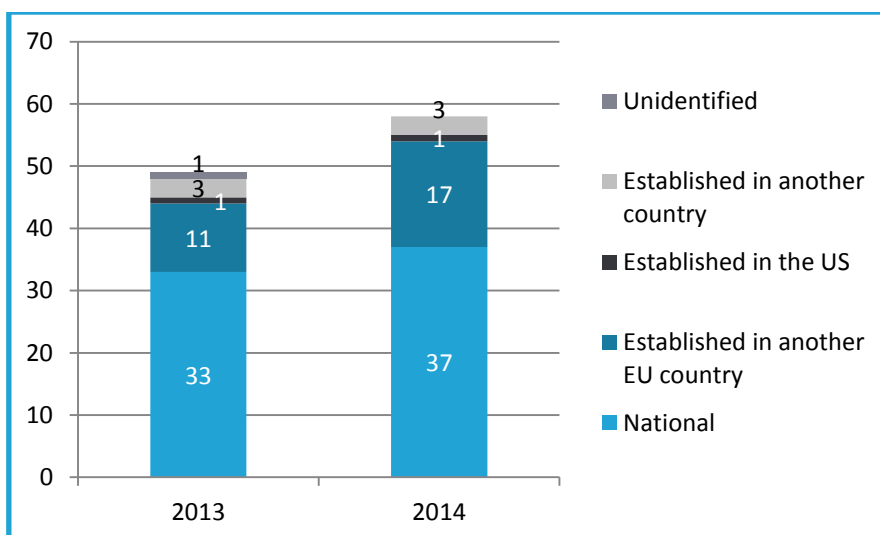


Source: European Audiovisual Observatory

PL – Poland

- The large majority of VoD services available in Poland are established in the country.

Figure 25: Number of video-on-demand services available in Poland by country of establishment 2013/14



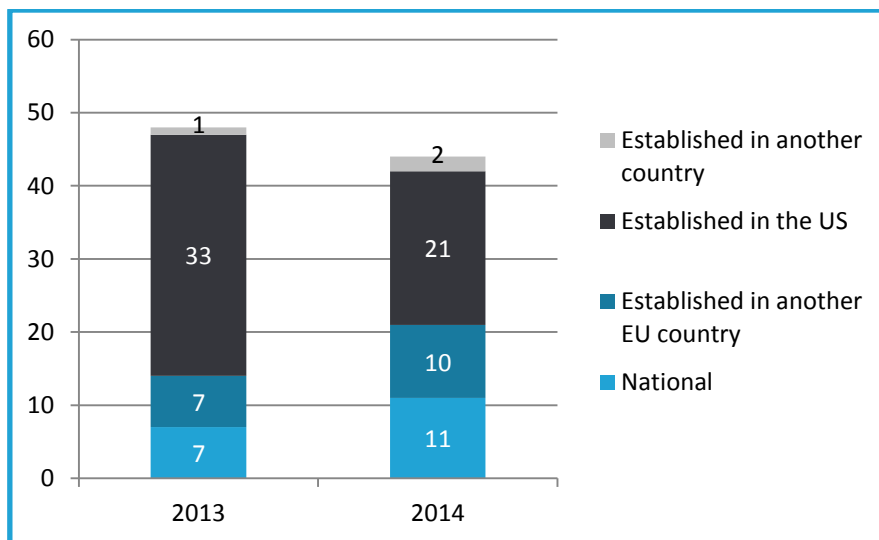
Source: European Audiovisual Observatory



PT – Portugal

- The majority of VoD services available in Portugal are established in the US.

Figure 26: Number of video-on-demand services available in Portugal by country of establishment 2013/14

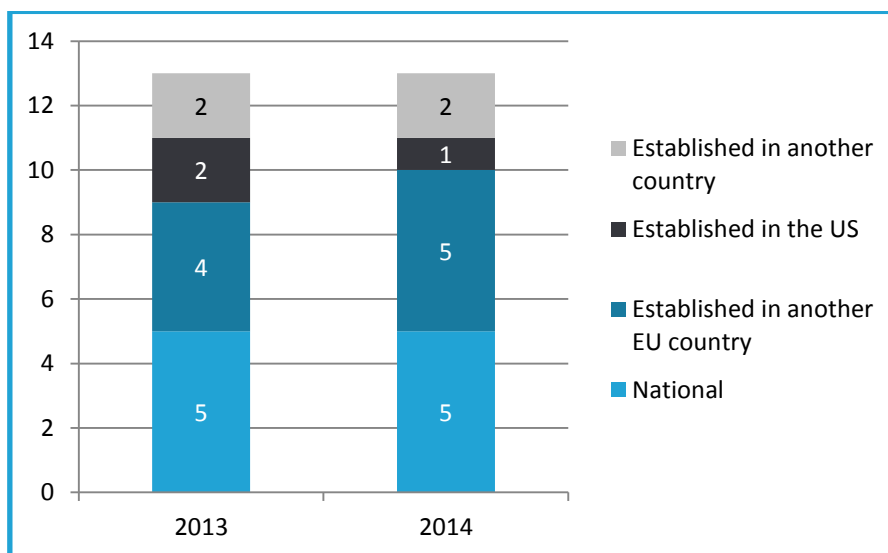


Source: European Audiovisual Observatory

RO – Romania

- Most of the VoD services available in Romania are either of national or EU origin.

Figure 27: Number of video-on-demand services available in Romania by country of establishment 2013/14



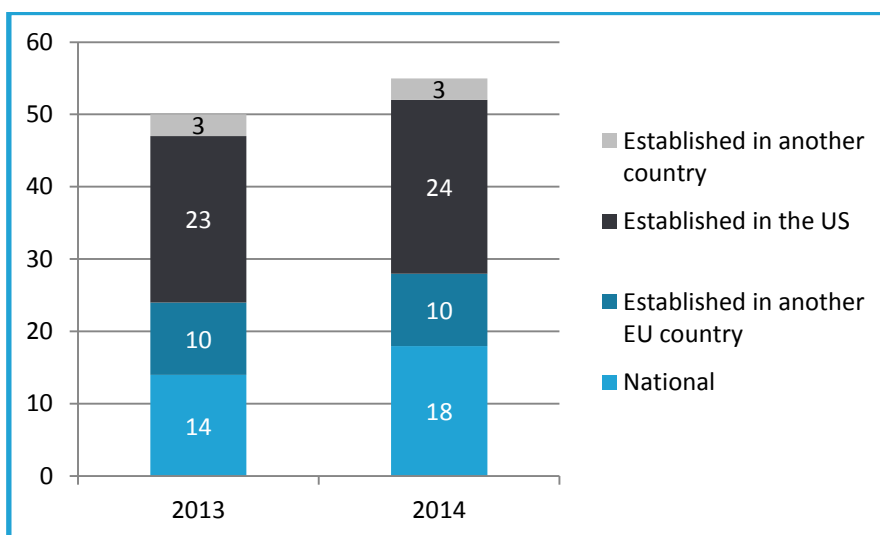
Source: European Audiovisual Observatory



SE – Sweden

- The largest part of VoD services available in Sweden are US-based, followed by nationally established services in second and EU-based services in third place. The country is home to a number of services that target other countries, mainly Denmark and Finland (e.g. Viaplay, SF Anytime, CMore).

Figure 28: Number of video-on-demand services available in Sweden by country of establishment 2013/14

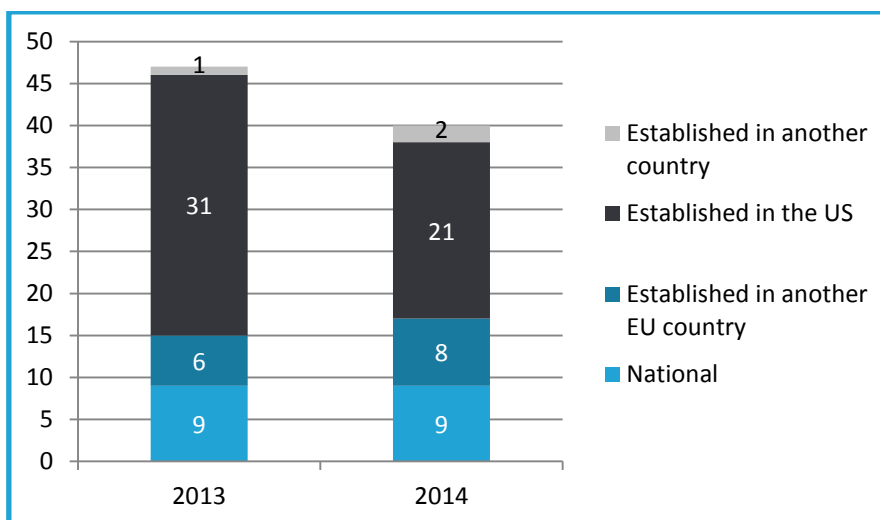


Source: European Audiovisual Observatory

SI – Slovenia

- Most of the VoD services available in Slovenia are US-based services.

Figure 29: Number of video-on-demand services available in Slovenia by country of establishment 2013/14



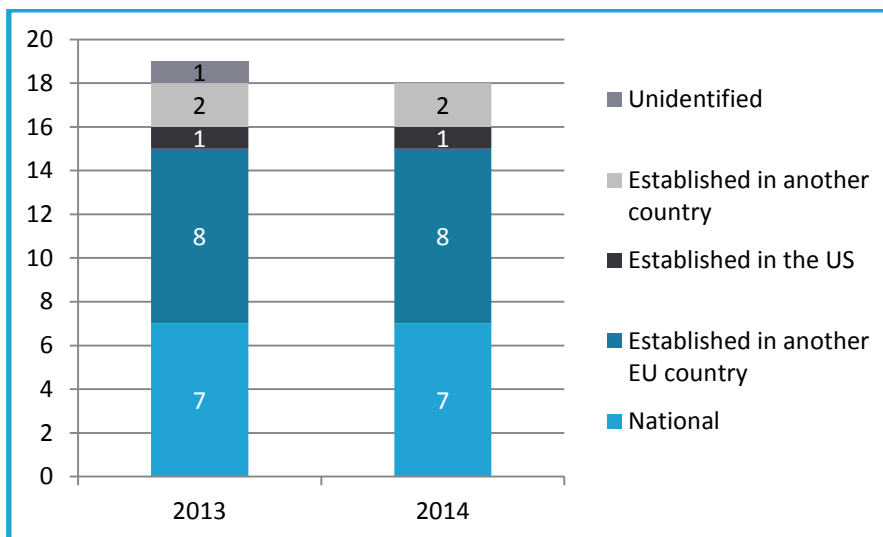
Source: European Audiovisual Observatory



SK – Slovak Republic

- Most of the VoD services available in the Slovak Republic are either national or come from another EU country.

Figure 30: Number of video-on-demand services available in the Slovak Republic by country of establishment 2013/14

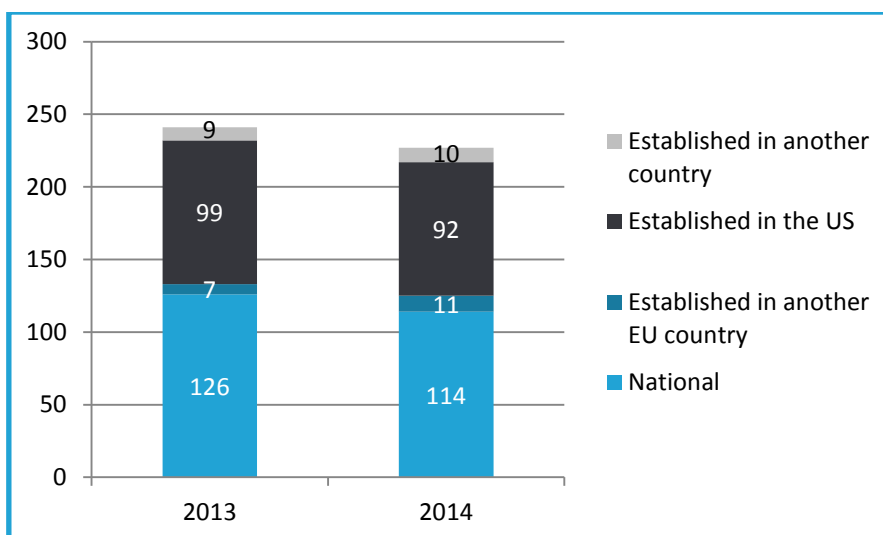


Source: European Audiovisual Observatory

UK – United Kingdom

- Most of the VoD services available in the UK are of national origin and more than half of these (e.g. 69) target other countries.

Figure 31: Number of video-on-demand services available in the United Kingdom by country of establishment 2013/14



Source: European Audiovisual Observatory



5 2015 update 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 probably 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 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.