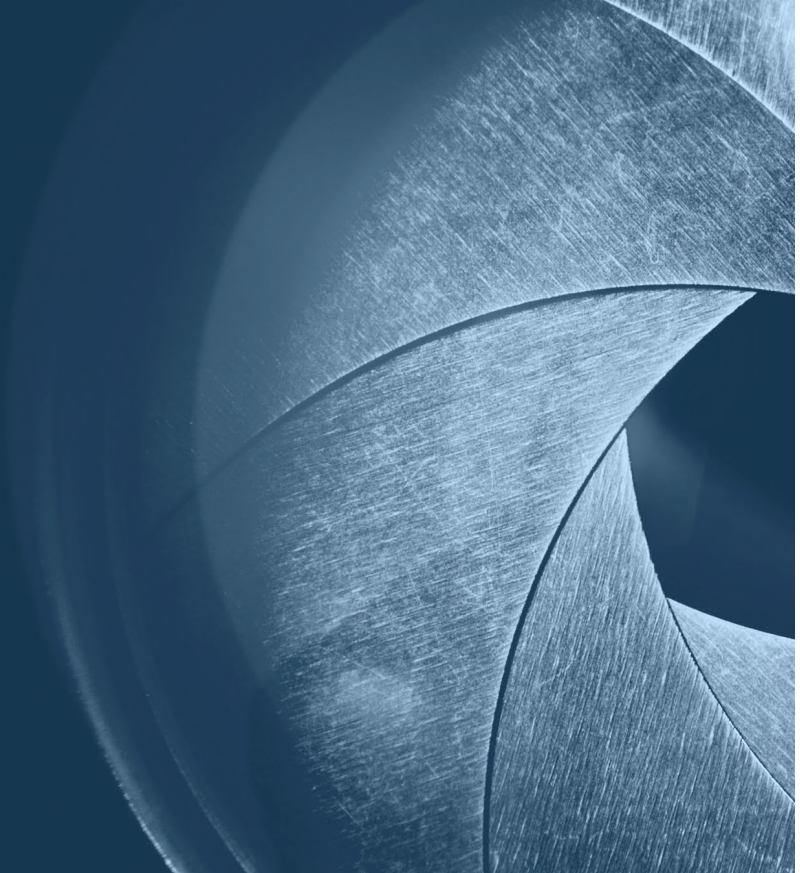




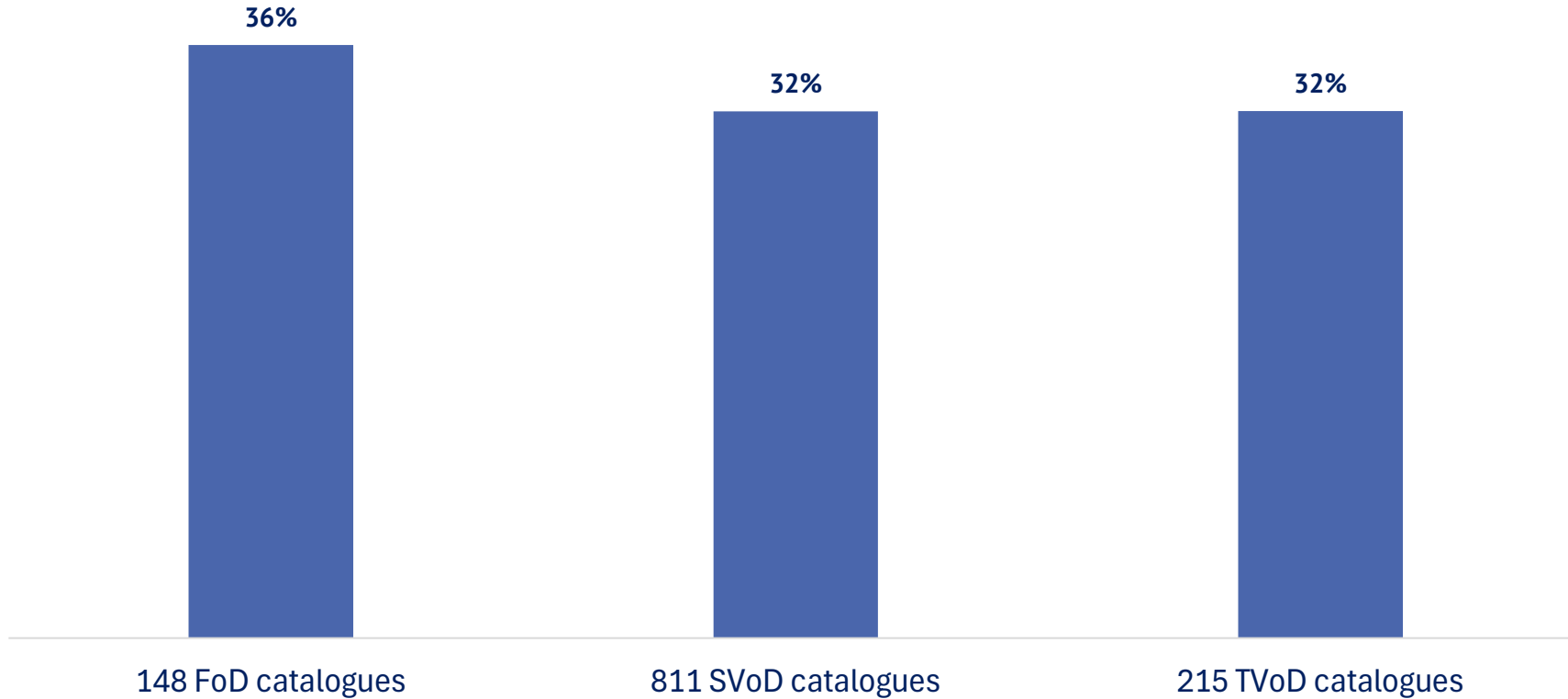
Promotion of European works – A look at shares of European works in VOD catalogues and VOD usage

A presentation of the European Audiovisual Observatory by
Christian Grece and Jean-Augustin Tran



On average, a share of more than 30% of European works in VOD catalogues

Share of European works in 25 EU countries by business model
Of all films and TV seasons in VOD catalogues



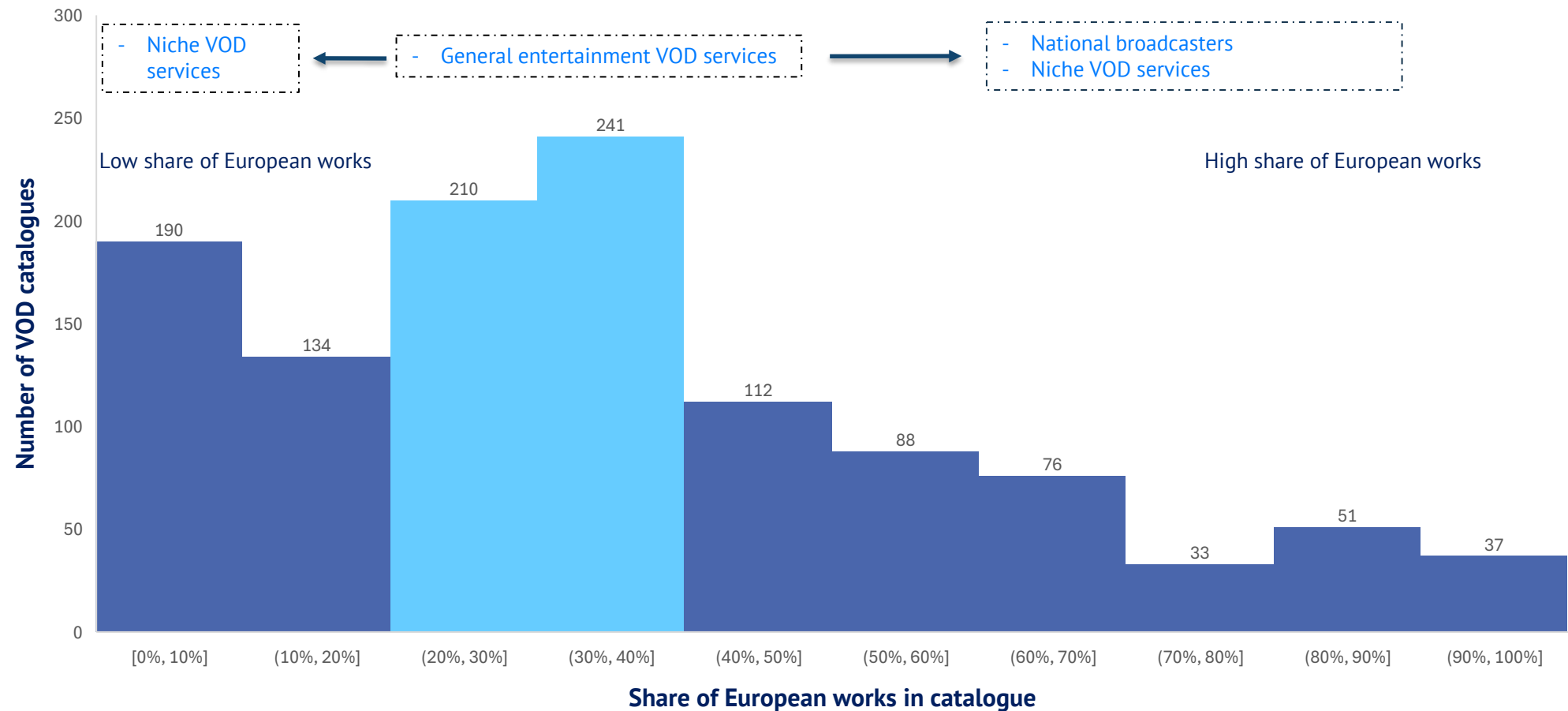
Source: JustWatch catalogues data February 2025 in 25 EU countries (no data on CY and LU)

First production country of a work is taken into account

A work is considered 'European' if the first production country is member of the EU or the European Audiovisual Observatory

Large differences between VOD catalogues in the proportion of European works

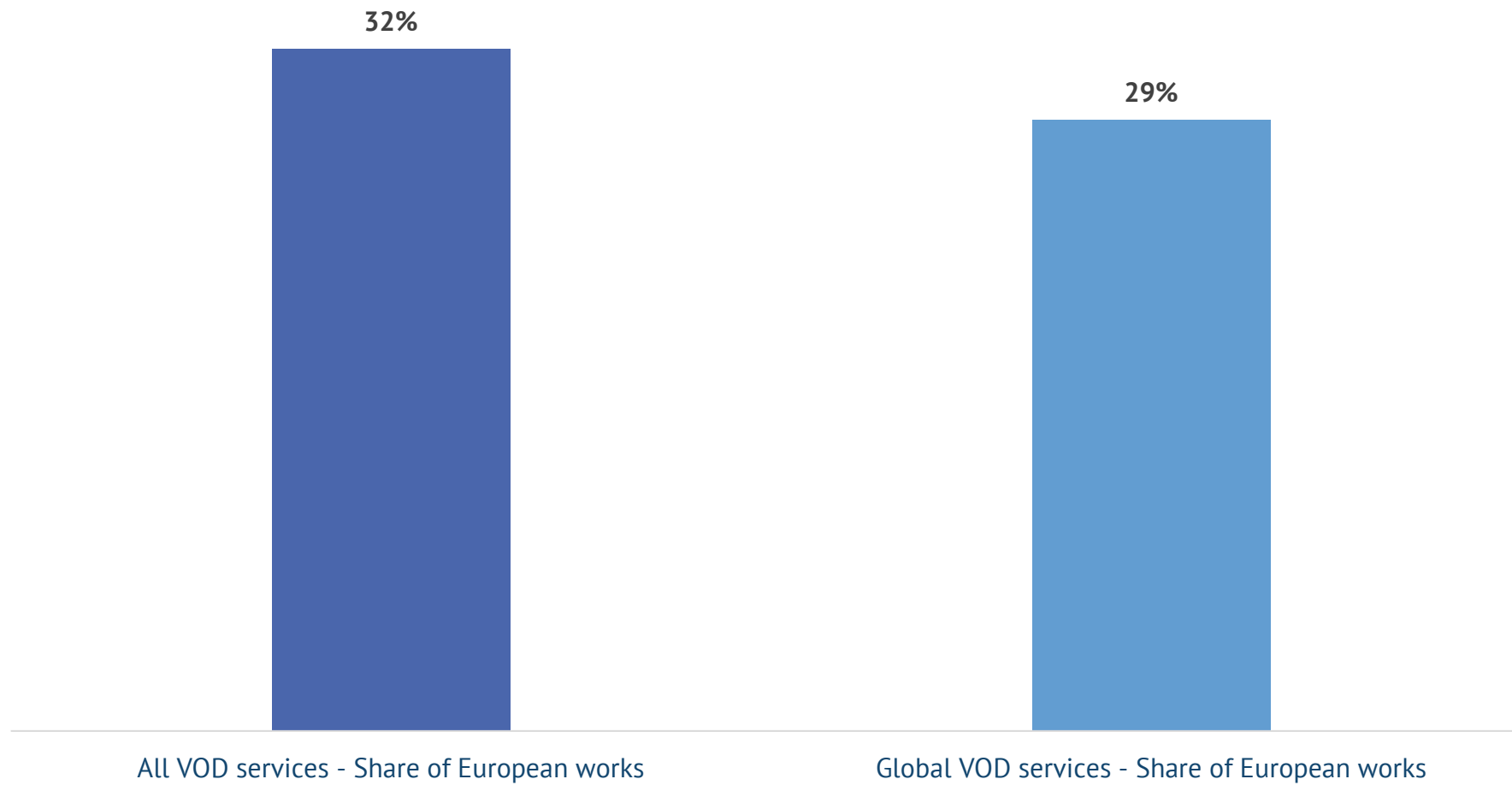
Range of share of European works by number of VOD catalogues



Source: JustWatch catalogues data February 2025

Origin of service owner influences share of European works in VOD catalogues

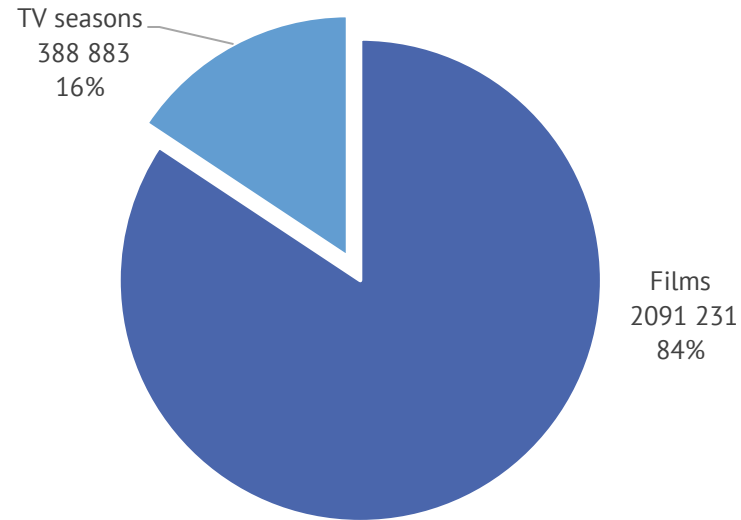
Share of European works - All and global services



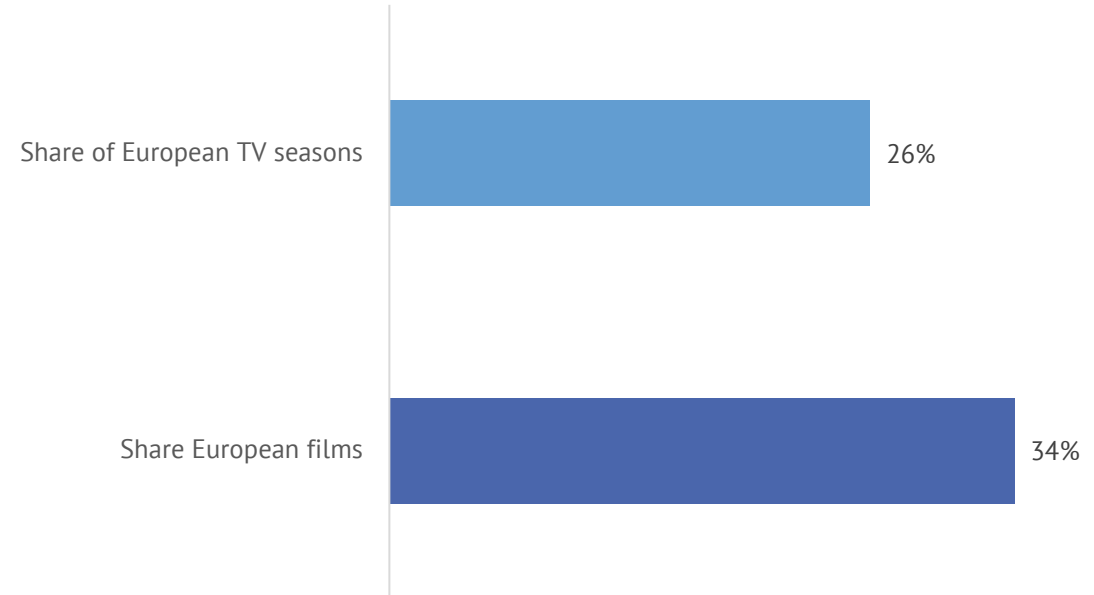
Source: JustWatch catalogues data February 2025

The share of European works is mainly a measurement of the share of European films

Split films and TV seasons in VOD catalogues



Share of European works in VOD catalogues



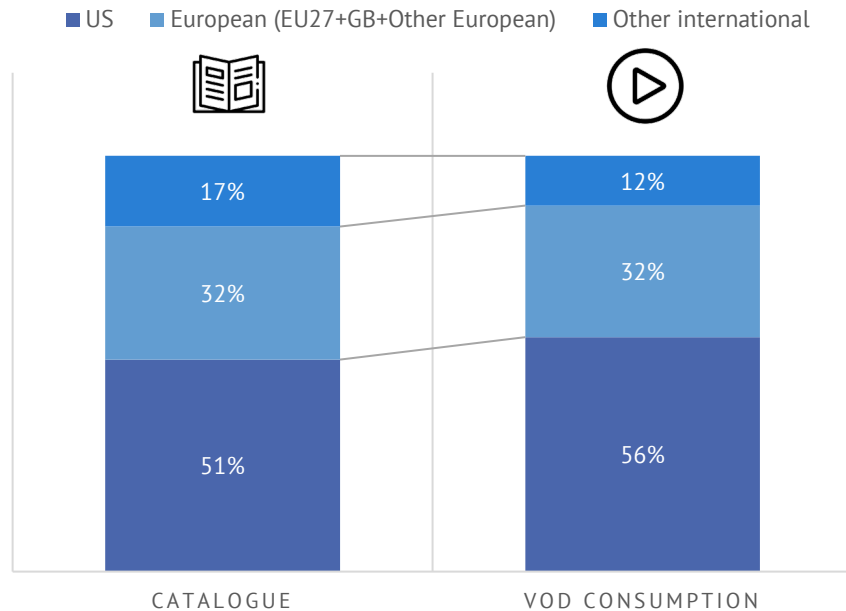
→ The unit of measurement for **TV series** is the **TV season**.

→ If **episodes** were taken into account, the **total share of European works would depend more significantly on TV series**. On average, many international series have a greater number of episodes than European series.

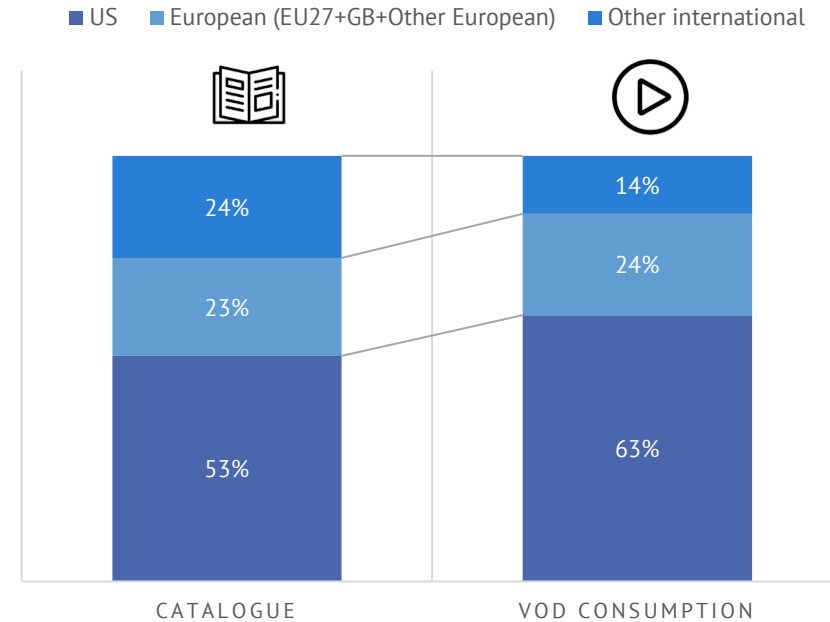
→ Not all films were released in EU cinemas – 40% of European films and 60% of international films present in VOD catalogues were not released in EU cinemas.

The share of European works in catalogue and is usage is similar

VIEWING TIME VS. SHARE OF WORKS IN CATALOGUE *IN TOTAL VIEWING TIME IN HOURS AND NUMBER OF FILMS*



VIEWING TIME VS. SHARE OF WORKS IN CATALOGUE *IN TOTAL VIEWING TIME IN HOURS AND NUMBER OF TV SEASONS*



➔ The gap between share of catalogue and share of consumption is narrow.

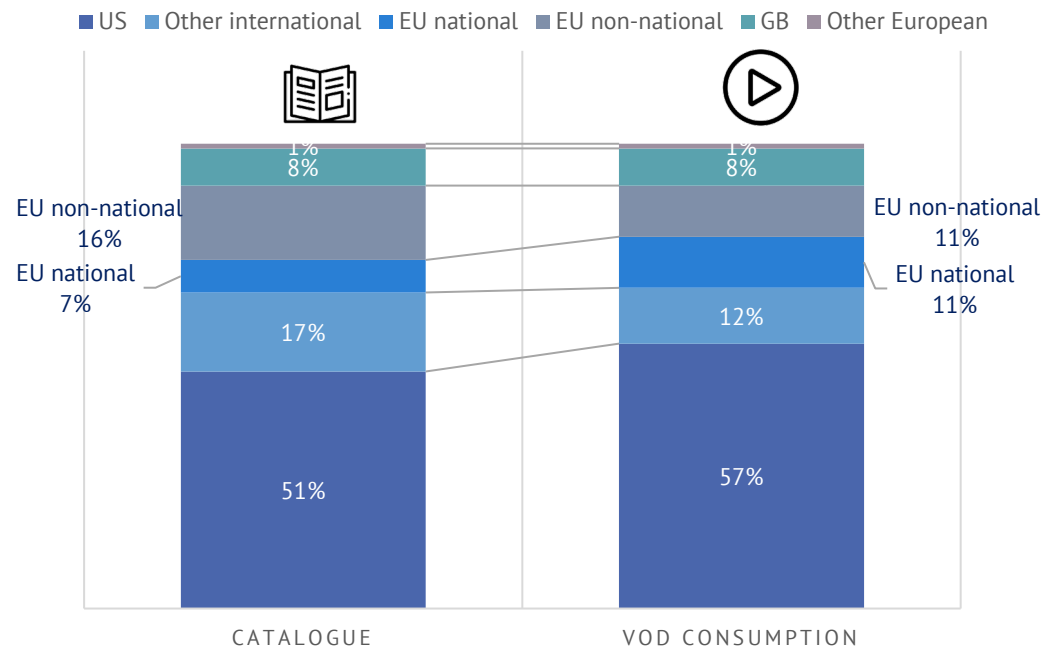
Source SVOD viewing time: OBS based on Digital i data in 9 EU countries (Jan-Sept 2024)

Source catalogue: JustWatch catalogues data June 2024

Contrary to EU non-national content, EU national content is watched more than its share in the catalogue

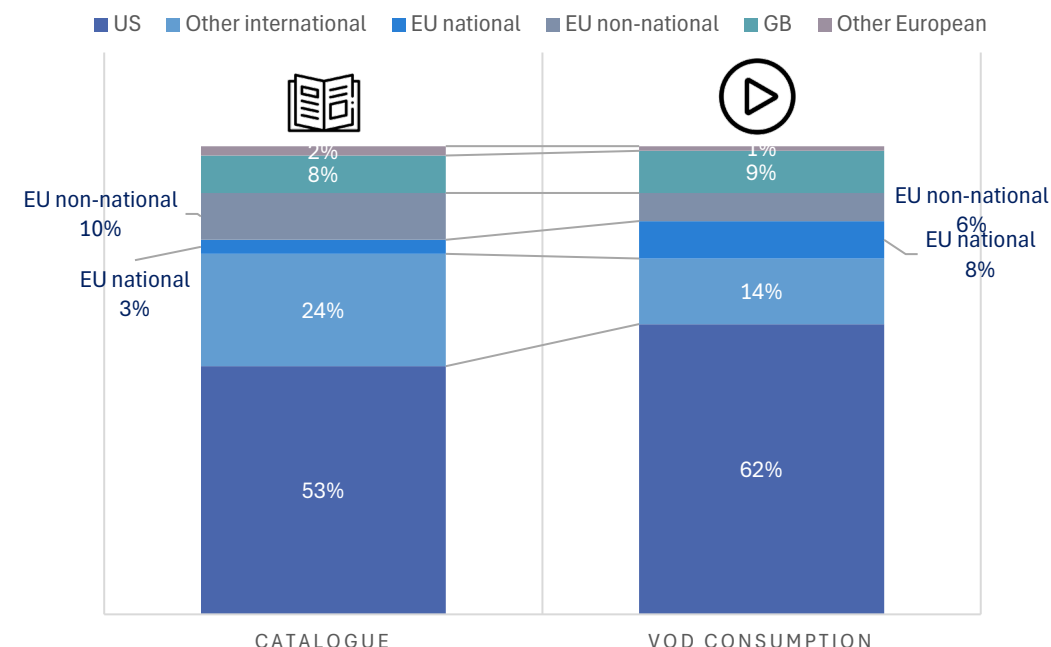
VIEWING TIME VS. SHARE OF WORKS IN CATALOGUE

IN TOTAL VIEWING TIME IN HOURS AND NUMBER OF FILMS



VIEWING TIME VS. SHARE OF WORKS IN CATALOGUE

IN TOTAL VIEWING TIME IN HOURS AND NUMBER OF TV SEASONS

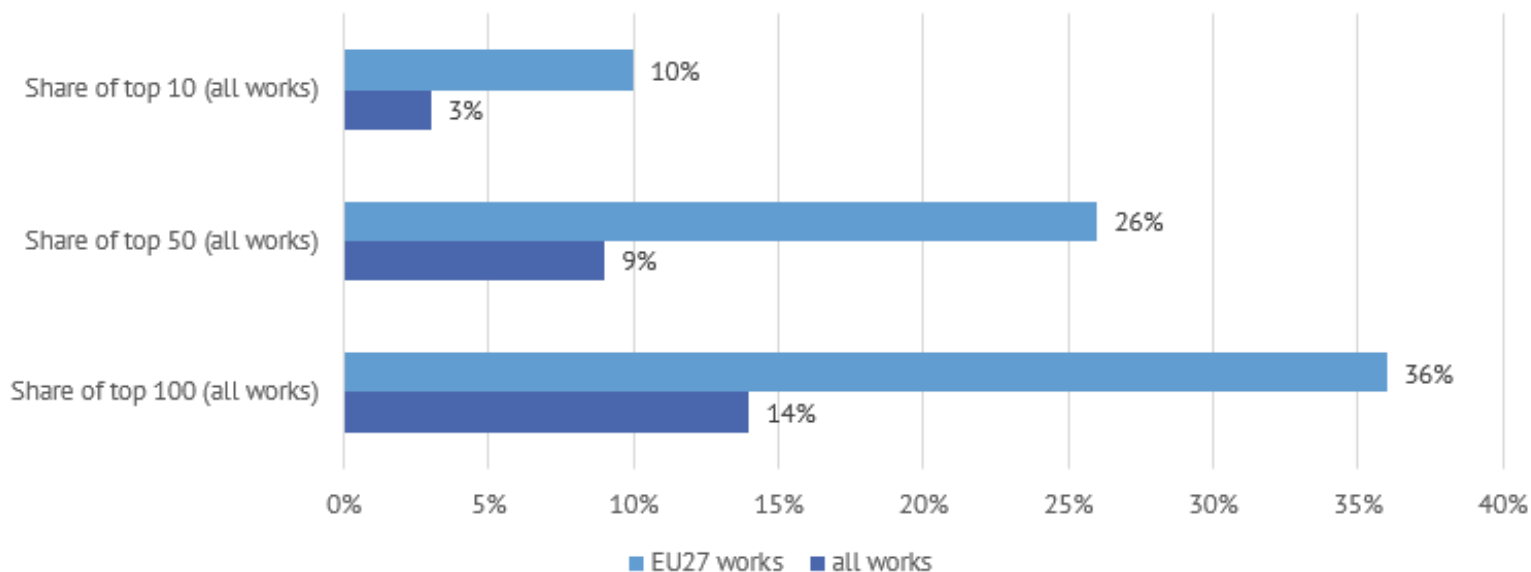


➔ While EU national content is watched proportionally more than its share in the catalogues for both films and TV seasons, EU non-national content is watched less than its share in the catalogues.

Source SVOD viewing time: OBS based on Digital i data in 9 EU countries (Jan-Sept 2024)
Source catalogue: JustWatch catalogues data June 2024

EU consumption is more concentrated that works of all origins

All works - Share of viewing time of the most watched works
In % of total viewing time in hours, EU9



➔ The share of European works depends to an extent on the success of a limited number of works.

Source SVOD viewing time: OBS based on Digital i data in 9 EU countries (Jan-Sept 2024)

Source catalogue: JustWatch catalogues data June 2024