

Film and TV content in VOD catalogues 2020 Edition

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A. Main findings - Film and TV content in VOD catalogues in the EU27

B. Films in VOD catalogues in the EU27

C. TV content in VOD catalogues in the EU27

For each section, six subsections:

1. Size of catalogues
2. Number of unique content available in catalogues
3. Origin and circulation of content
4. Focus on services' core business and ownership
5. Composition of catalogues by national and EU27 non-national content
6. Focus on the export of EU27 content in the EU27 on TVOD and SVOD

Introduction

- ▶ The aim of this report is to provide a second global insight into the composition of **VOD catalogues in the 27 Member States of the European Union** (hereafter EU27), the first since the United Kingdom left the European Union, looking at both film and TV content with **7 research questions** addressed:
 - ▶ What is the average and median size of TVOD and SVOD catalogues, for film and TV content?
 - ▶ What are the regions of origin of unique titles in VOD catalogues?
 - ▶ What are the shares of films and TV content by region of origin in VOD catalogues?
 - ▶ On average, what is the country and service circulation of unique titles by region of origin?
 - ▶ Which players offer the largest number of film and TV content, and what are the shares of this content by region of origin?
 - ▶ What is the share of national and EU27 non-national works in VOD catalogues?
 - ▶ Which EU27 production countries are the main exporters of film and TV titles on VOD in the EU27?
- ▶ For film data, 138 TVOD catalogues and 185 SVOD catalogues were analysed based on JustWatch, Filmtoro, La Pantalla Digital and EUROVOD catalogue data. The data was collected in May 2020 and the titles were matched through databases with their countries of production.
- ▶ For TV content, the analysis was based on JustWatch data from 160 Subscription Video-On-Demand (SVOD) catalogues in 20 EU countries and on 47 Transactional Video-On-Demand (TVOD) catalogues in 14 EU countries. The data was collected in May 2020 and the TV titles were matched through databases with their countries of production.

Methodology

- ▶ A film is defined as a feature film, fiction film, documentary or other film content available in the “Film” / “Movie” section of the VOD catalogues part of the sample.
- ▶ For the TV content section, all content classified under as “TV” on VOD services is considered.
- ▶ The contents were analysed as unique and cumulated titles (for films), and as unique and cumulated seasons or episodes (for the TV content) available on VOD.
- ▶ For the **origin of a title, only the first country of production was considered**. The production countries are based on data collected from the European Audiovisual Observatory’s LUMIERE database on admissions to films in Europe, IMDb and the Movie database.
- ▶ **4 regions of origin for a title are considered**: ‘EU27’ titles have an EU27 country as first production country, ‘Other European’ (EUR OBS) titles have as a first production country a European country part of the European Audiovisual Observatory, ‘US’ titles from the United States of America and ‘Other region’/‘Other international’ titles from all other countries.
- ▶ The shares included in this report are only indicative and minor identification errors might have occurred.
- ▶ Please quote this report as “Film and TV content in VOD catalogues – 2020 edition”, European Audiovisual Observatory.
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Main findings – Film and TV content

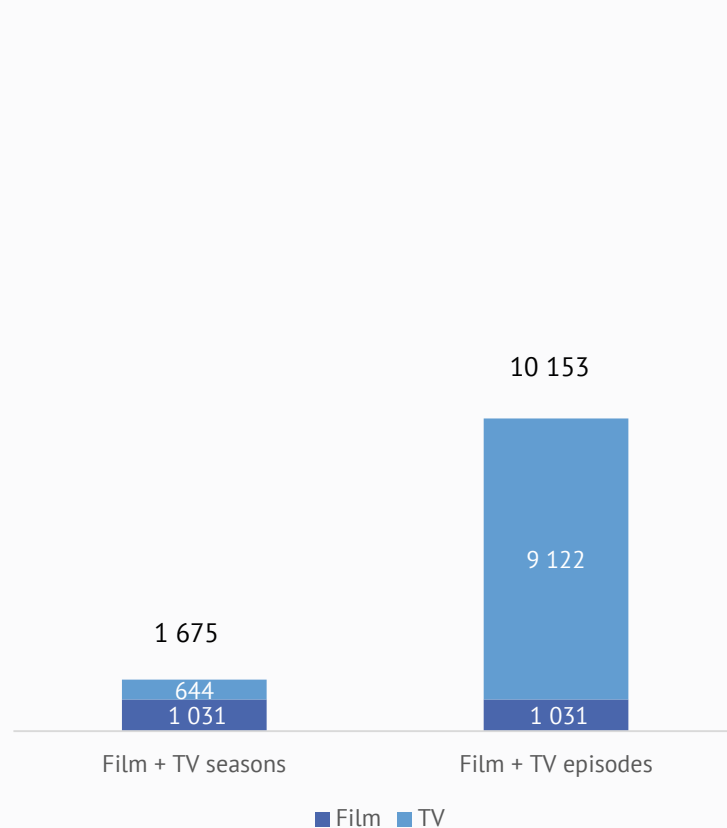
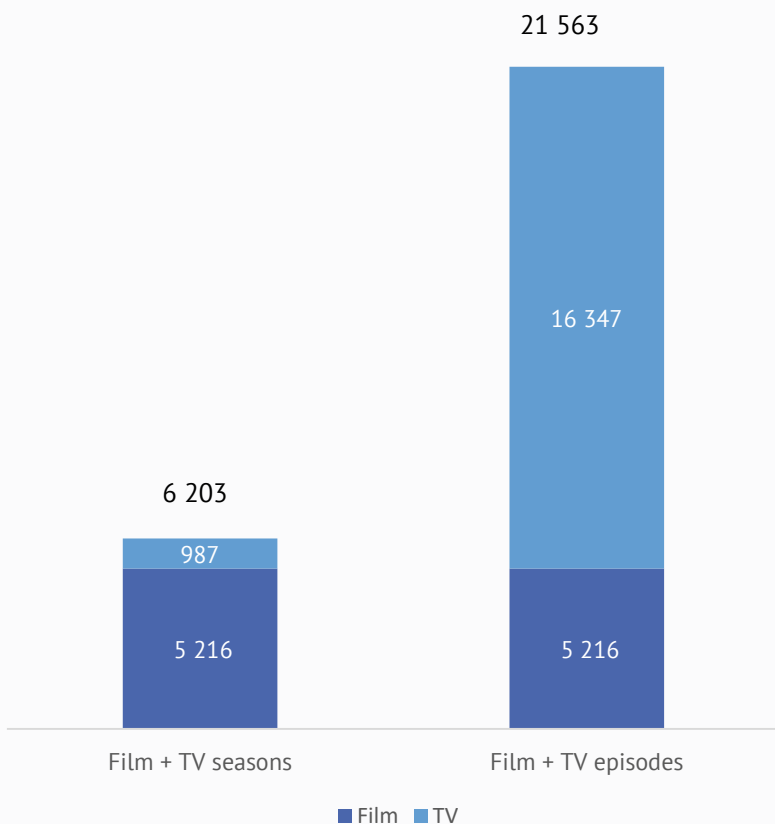
This section builds on the analysis of film + TV content put together, on TVOD and SVOD. The samples for film and TV content being partially different, these results should be taken as indicative.

Average size of catalogues: the impact of choice of indicators on the results

- ▶ On average, there were more film titles than TV seasons, mainly on TVOD (5 times more).
- ▶ Considering TV episodes, TV content offer was on average nine times bigger than film offer on SVOD, and 3 times bigger on TVOD.

Size of TVOD catalogues in **average** number of content

Size of SVOD catalogues in **average** number of content

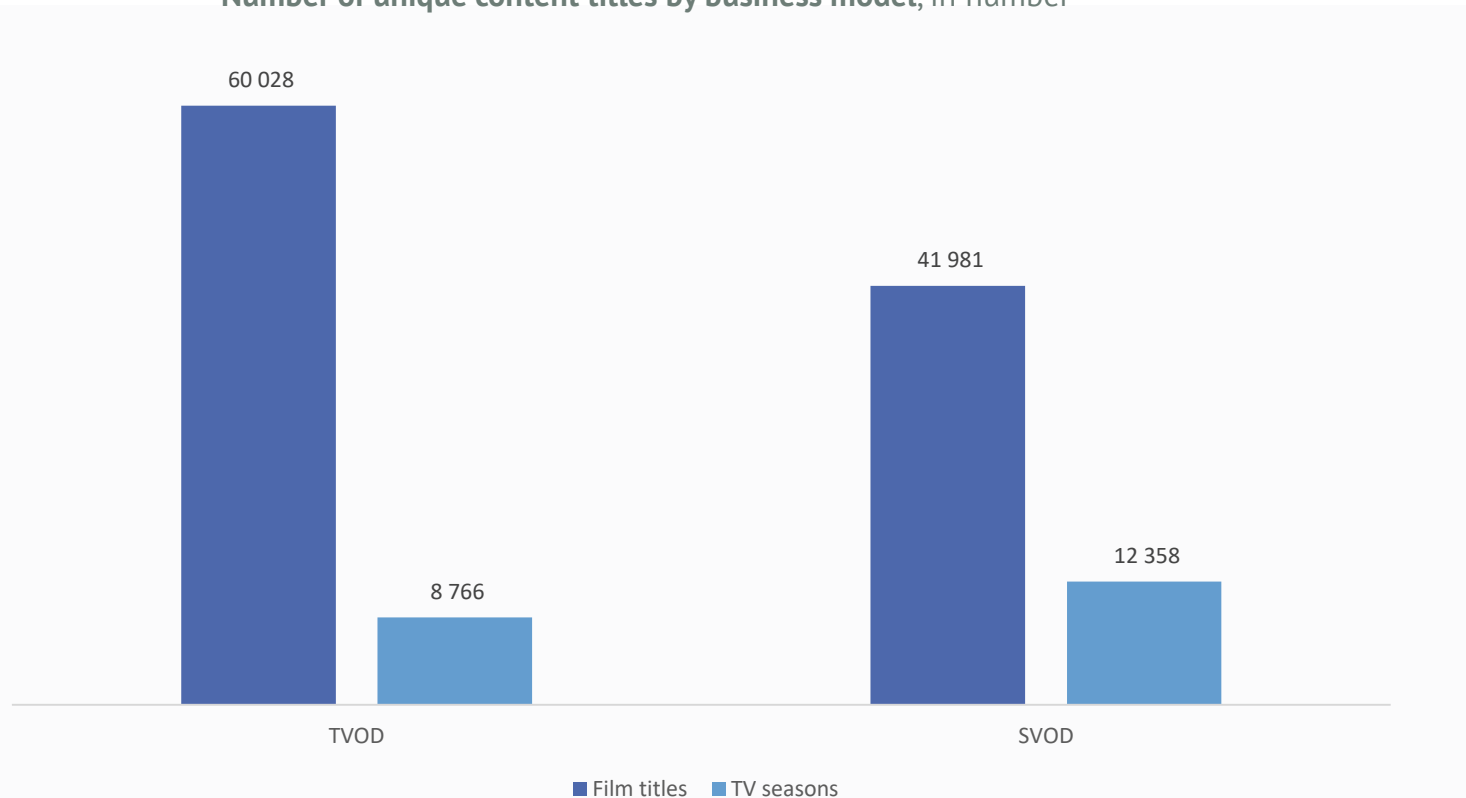


Source: JustWatch, Filmtoro, La Pantalla Digital, EUROVOD catalogue data

Bigger offer of unique film titles than of unique TV seasons on VOD

- ▶ The offer of unique film titles was 7 times higher than the offer of unique TV seasons on TVOD, and 3 times higher on SVOD.
- ▶ Proportionally, TVOD was more film-oriented and SVOD was more series-oriented.
- ▶ The presence of more niche TVOD services than SVOD services, specialised in art-house films, also increased the number of unique film titles on TVOD.

Number of unique content titles by business model, in number

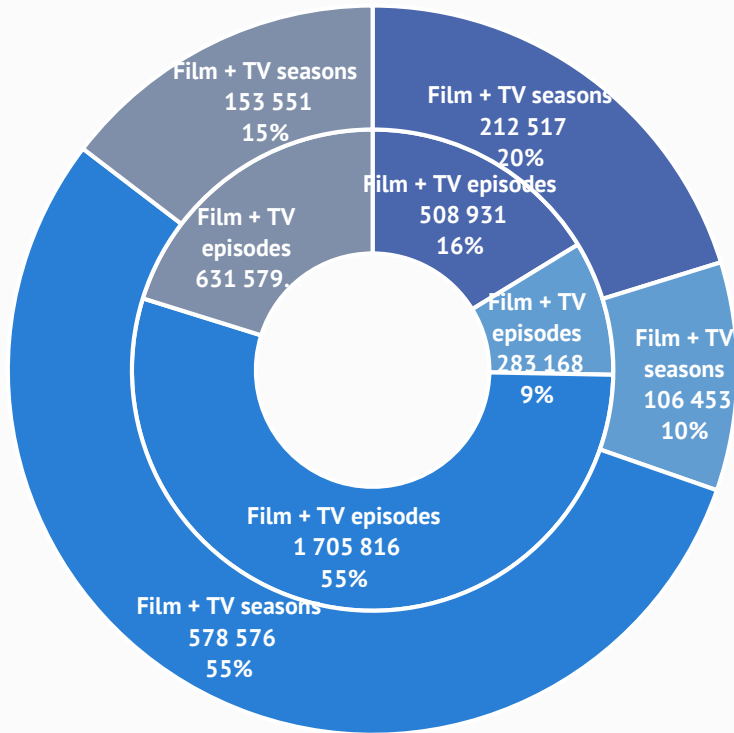


Source: JustWatch, Filmtoro, La Pantalla Digital, EUROVOD catalogue data

Origin by region of Films and TV seasons and of Films and TV episodes – all VOD

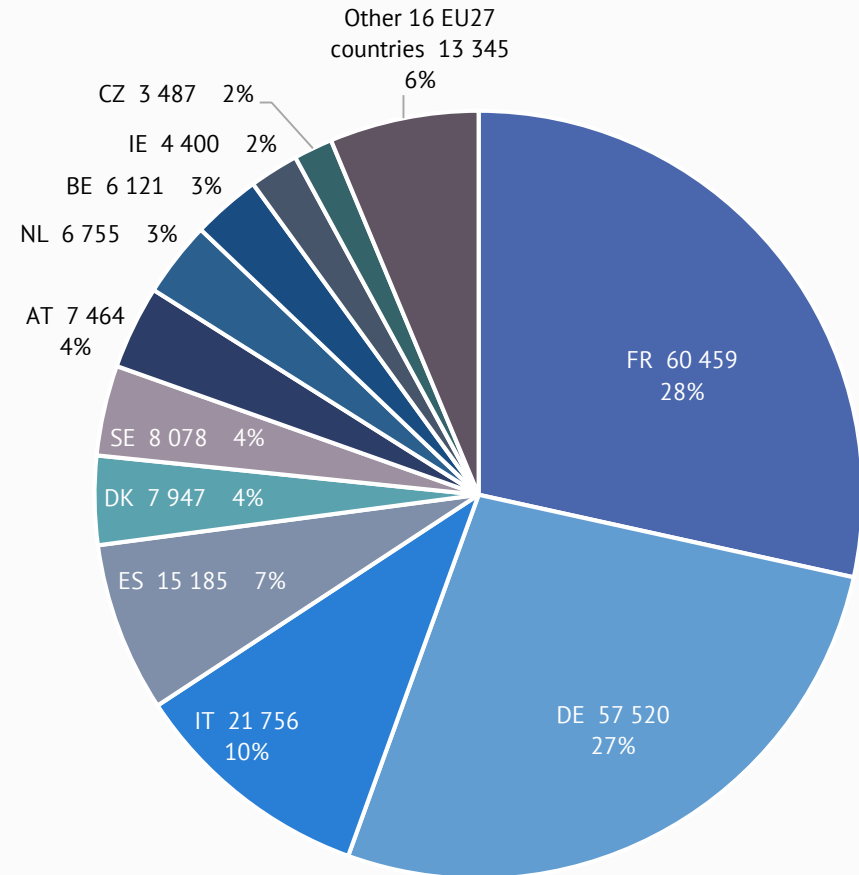
- ▶ On VOD (TVOD and SVOD), EU27 content represented 20% when films and TV seasons were counted, 16% if films and TV episodes were considered.
- ▶ EU27 films and TV seasons originated mainly in France, Germany, Italy, Spain, Denmark, Sweden and Austria with 84% of all EU 27 TV seasons and films.

Origin of Film and TV seasons or episodes found on VOD



■ EU27 ■ EUR OBS ■ US ■ Other regions

Origin of EU27 Film and TV seasons found on VOD

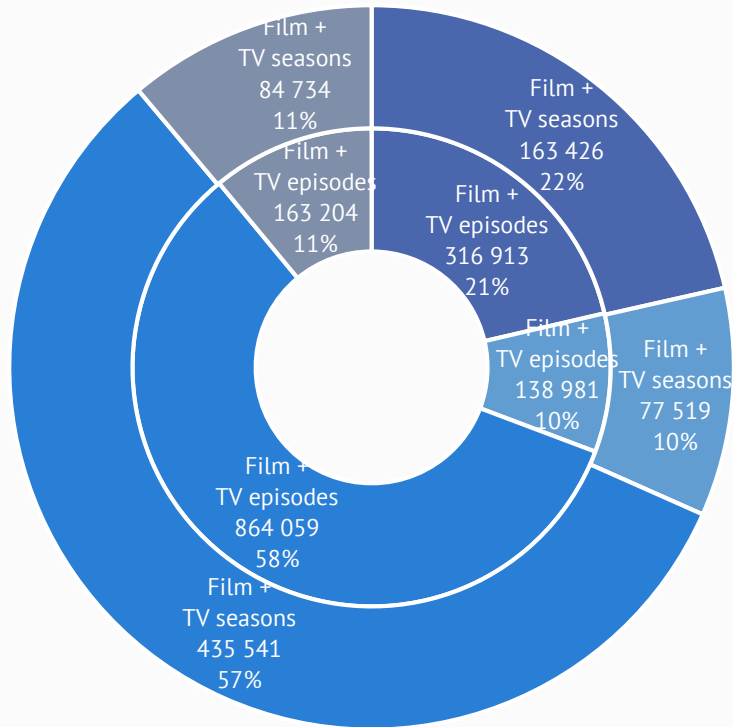


Source: JustWatch, Filmtoro, La Pantalla Digital, EUROVOD catalogue data

Origin by region of Films and TV seasons, of Films and TV episodes

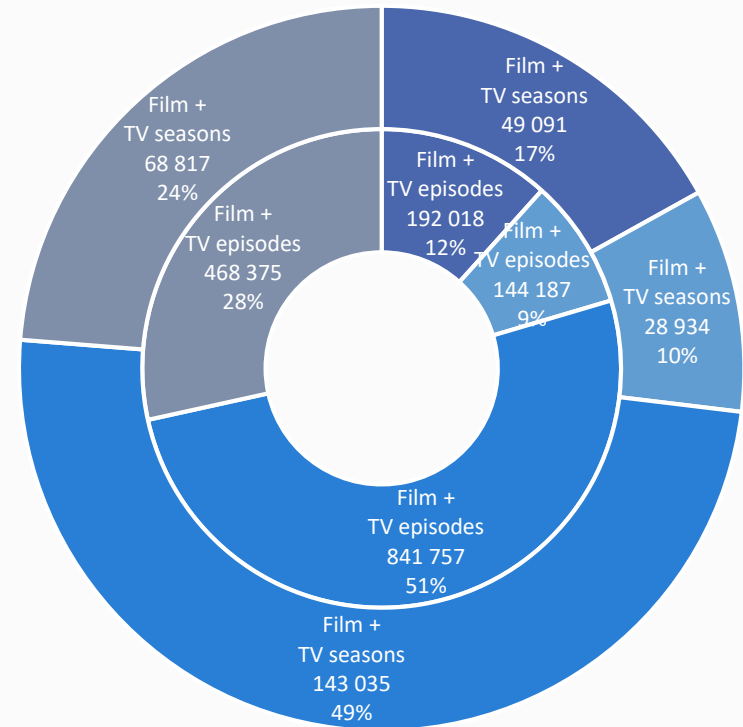
- ▶ On TVOD, EU27 content represented 22% when films and TV seasons were counted, 21% if films and TV episodes were considered. On SVOD, the share of EU27 content was 17% when considering films and TV seasons but fell to 12% when counting films and TV episodes: European TV series are shorter in episodes than other origins series.
- ▶ After Brexit, British content moved under the Other European category, decreasing EU27 shares by 8% in average.
- ▶ On SVOD, content from regions other than Europe or the US were second in share and showed longer in episodes.

Origin of Film and TV seasons or episodes found on TVOD



■ EU27 ■ EUR OBS ■ US ■ Other intl.

Origin of Film and TV seasons or episodes found on SVOD



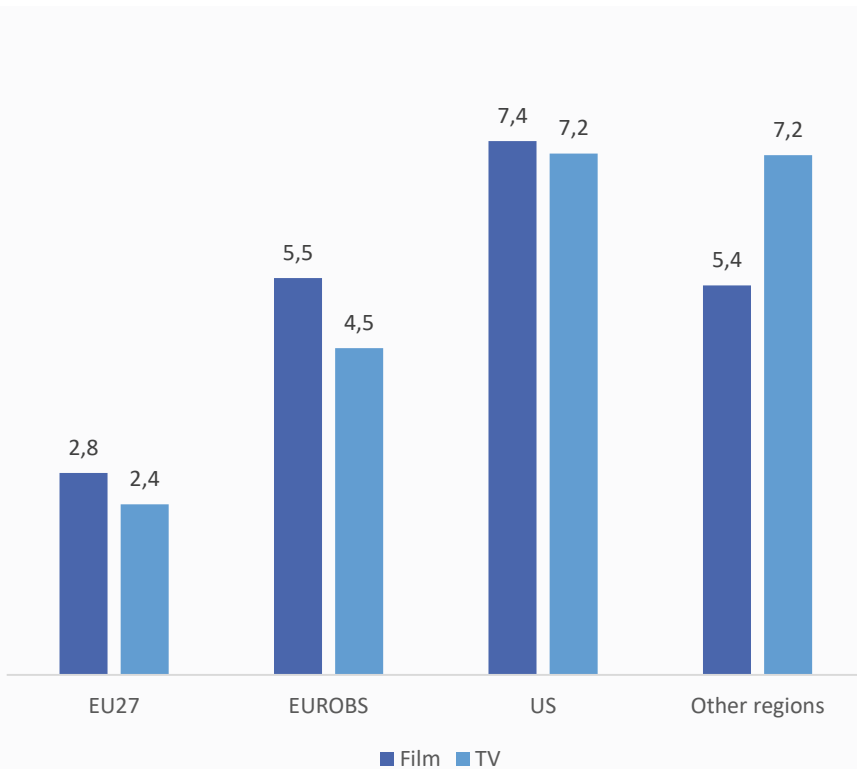
■ EU27 ■ EUR OBS ■ US ■ Other intl.

Source: JustWatch, Filmtoro, La Pantalla Digital, EUROVOD catalogue data

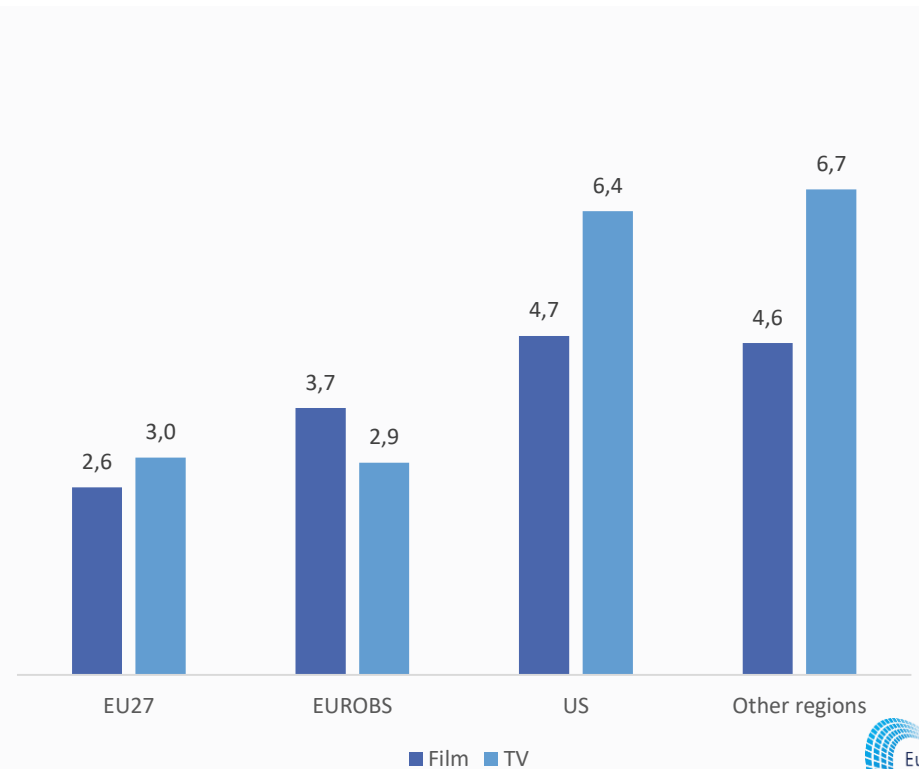
Country circulation of unique content by region and by business type (SVOD-TVOD)

- ▶ EU27 content circulated in less countries than content from all other regions.
- ▶ EU 27 Films circulated more than TV content on TVOD, but less on SVOD.

Circulation on TVOD by number of **countries**



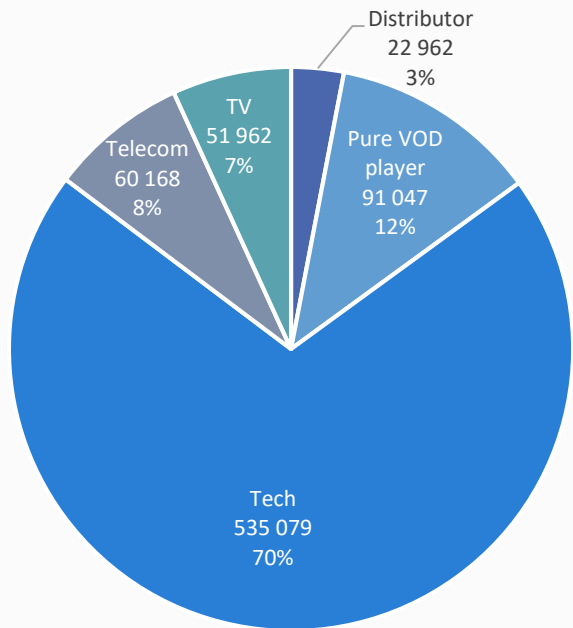
Circulation on SVOD by number of **countries**



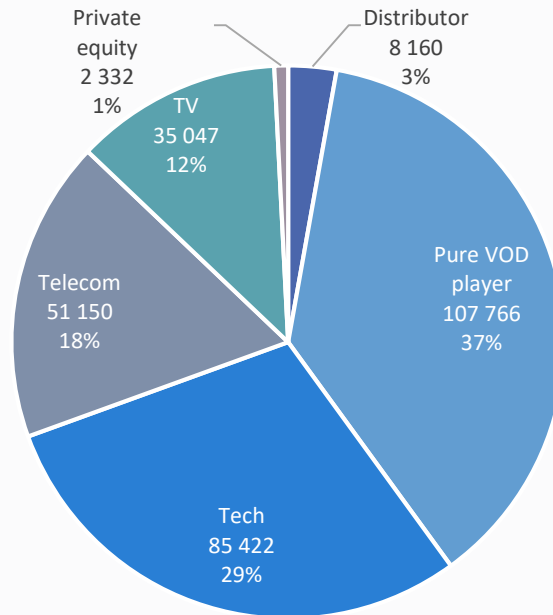
Tech and pure VOD players offer the largest amount of film and TV season

- ▶ On TVOD, the bulk of film titles and TV seasons (70%) was found in catalogues of tech players.
- ▶ On SVOD, pure VOD players and tech players offered two thirds of all film titles and TV seasons.
- ▶ For both business models, over 70% of the works available are offered by tech and pure VOD players while service operated by incumbent TV and Telecom players made up 30% of the content offer on SVOD and 15% on TVOD.

TVOD – Films and TV seasons in catalogues



SVOD – Films and TV seasons in catalogues



Core business	Number of TVOD catalogues	Average number of film and TV seasons per catalogue
Distributor	15	2 038
Pure VOD player	44	2 690
Tech	94	8 475
Telecom	19	5 574
TV	13	7 637

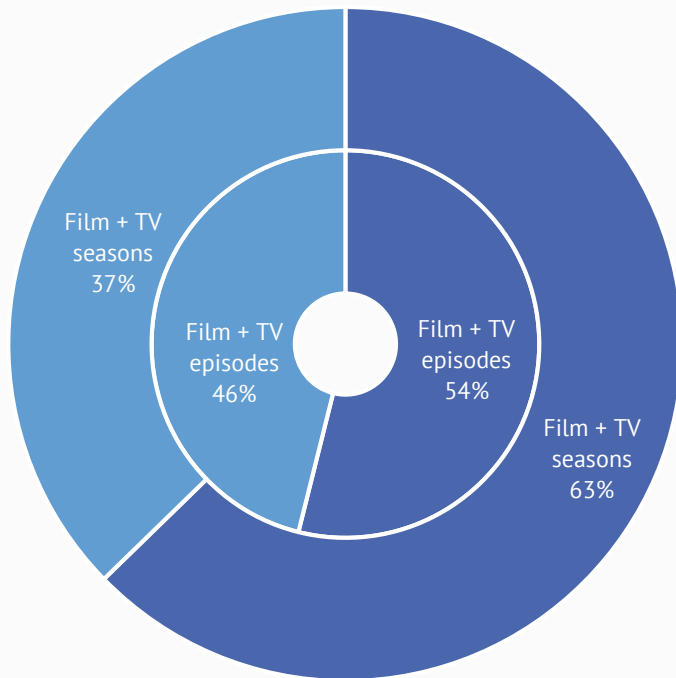
Core business	Number of SVOD catalogues	Average number of film and TV seasons per catalogue
Distributor	27	461
Pure VOD player	90	2 394
Tech	100	1 708
Telecom	56	1 811
TV	65	1 074
Private equity	7	602

Source: JustWatch, Filmtoro, La Pantalla Digital, EUROVOD catalogue data

Share of national and EU27 non-national Films and TV content in catalogues

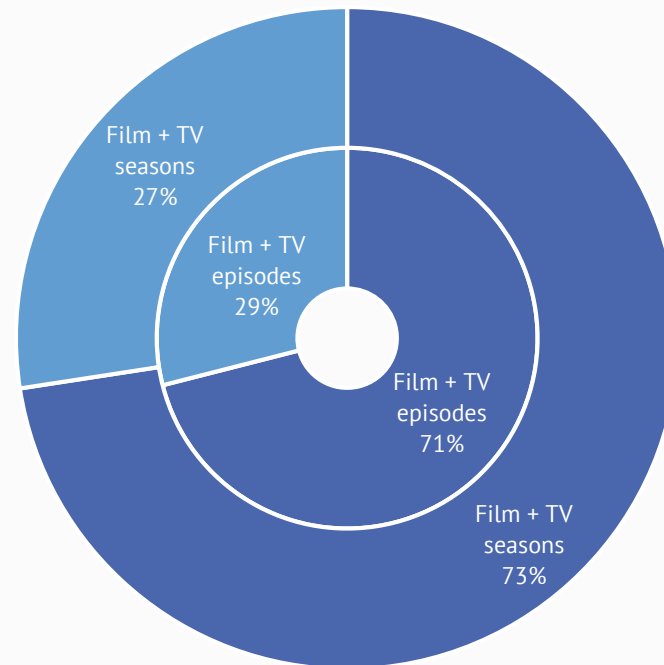
- ▶ **EU27 non-national film and TV content** represented the largest share of EU27 content, on both types of services but especially on **SVOD** where it represented close to three fourths of the EU27 content offer.

Share of EU non-national and national content on TVOD



■ EU non-national ■ National

Share of EU non-national and national content on SVOD

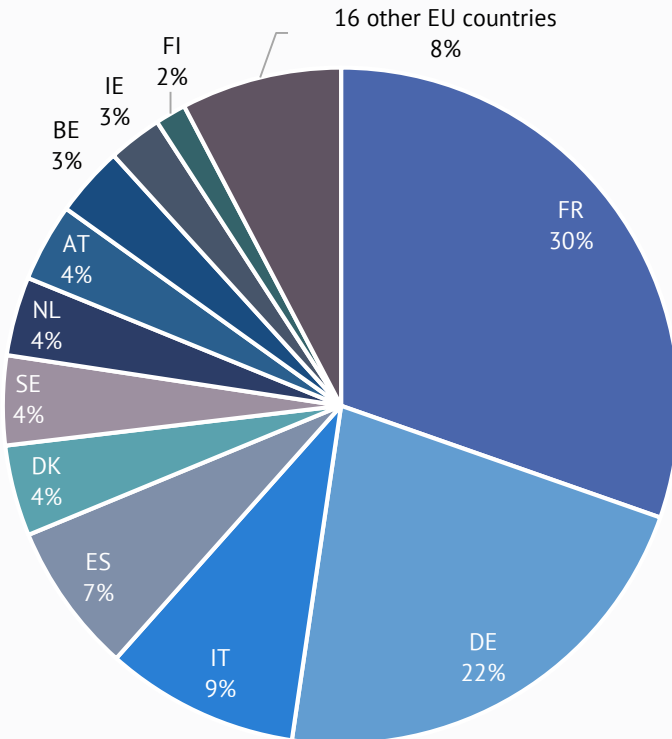


■ EU non-national ■ National

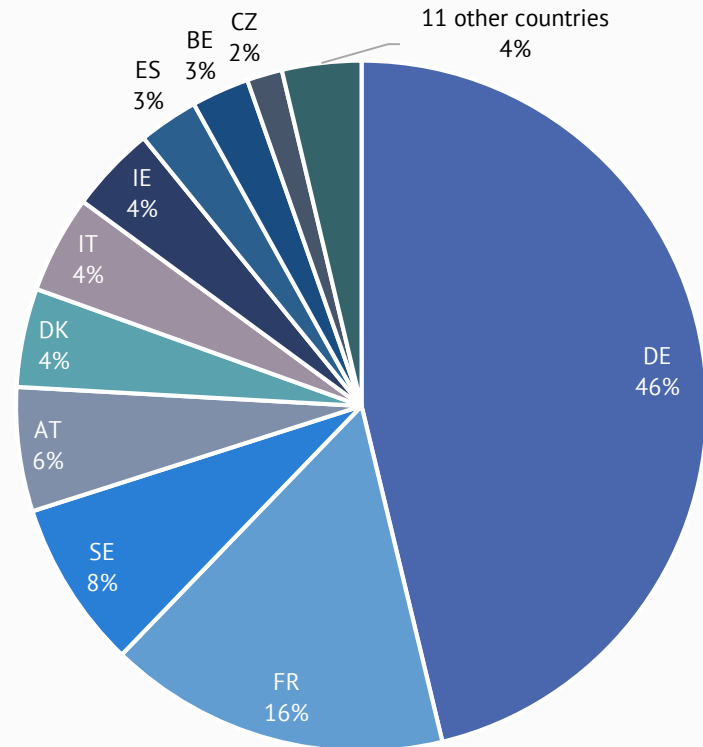
EU27 non-national content exported on TVOD: French films and German TV seasons

- ▶ The most exported EU27 film titles on TVOD were French, while almost half of the exported TV content offer on TVOD was German.
- ▶ While EU-4 were the top exporting countries for films on TVOD, this was not true for TV content.
- ▶ Nordic content (SE, DK) also reached export success, notably for TV seasons.

Origin of EU27 non-national film titles on TVOD



Origin of EU27 non-national TV seasons on TVOD

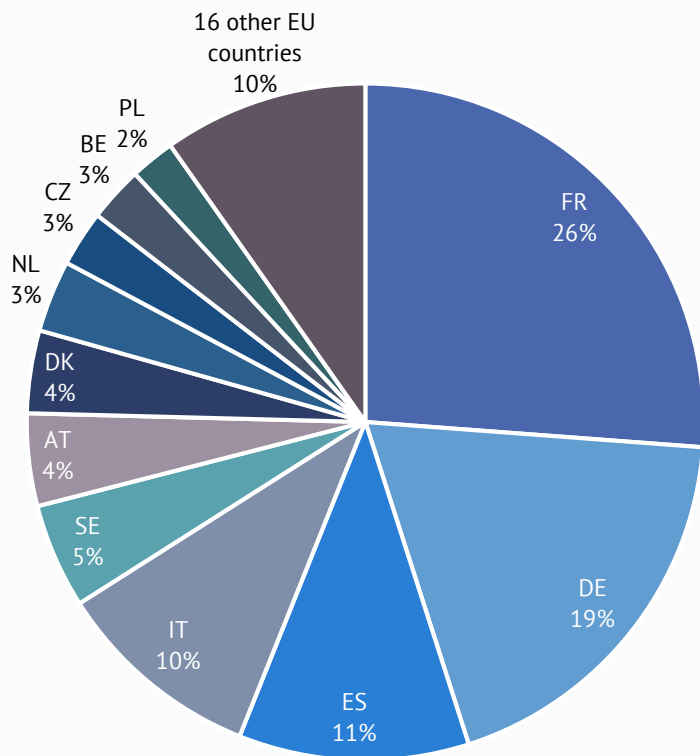


Source: JustWatch, Filmtoro, La Pantalla Digital, EUROVOD catalogue data

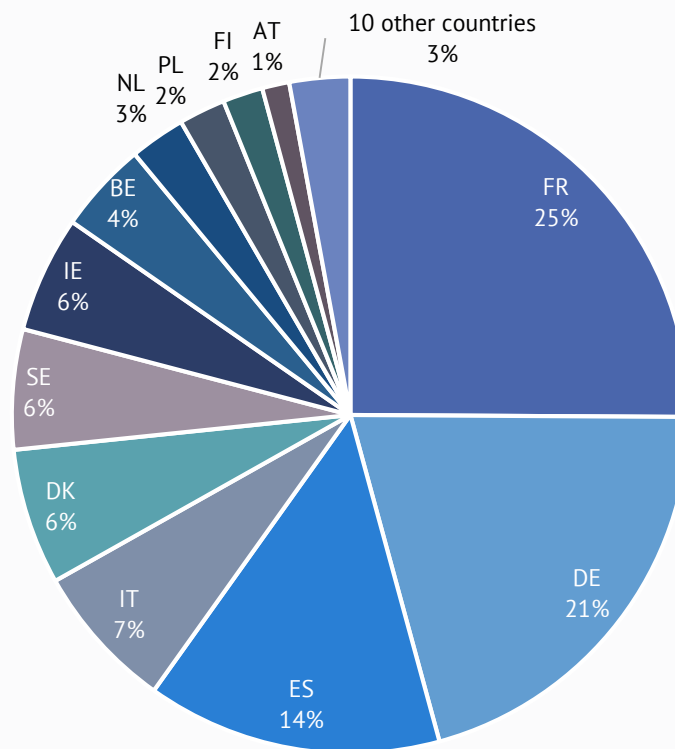
EU27 non-national content exported on SVOD: from EU4, mainly French and German

- ▶ On SVOD, the most exported titles, for both films and TV seasons, were French (around 25%).
- ▶ German, Spanish and Italian titles complete the top EU-4 export countries, both for films and TV seasons on SVOD, all four providing in both cases over two thirds of the offer on SVOD.
- ▶ Films and TV seasons from other origins included Nordic, Irish, Belgian and Dutch content.

Origin of EU non-national film titles on SVOD



Origin of EU non-national TV seasons on SVOD



Films in VOD catalogues in the EU27
Overview of
138 TVOD catalogues
and
185 SVOD catalogues

B.1 – Size of film catalogues

TVOD services were more focused on films than SVOD services

- ▶ On average, a higher number of films and higher median films in catalogues for TVOD services, suggesting that TVOD services are selling recent and catalogue films in their vast catalogues while SVOD services propose a smaller, ever changing, selection of films and a broad repertoire of TV content.

Multi-country services had, for both business models, larger film catalogues

- ▶ Be it for TVOD or SVOD, multi-country services had a higher average and median number of films in their catalogues than national services.
- ▶ But national TVOD services had still a higher average and median number of films than SVOD services, multi-country or national.

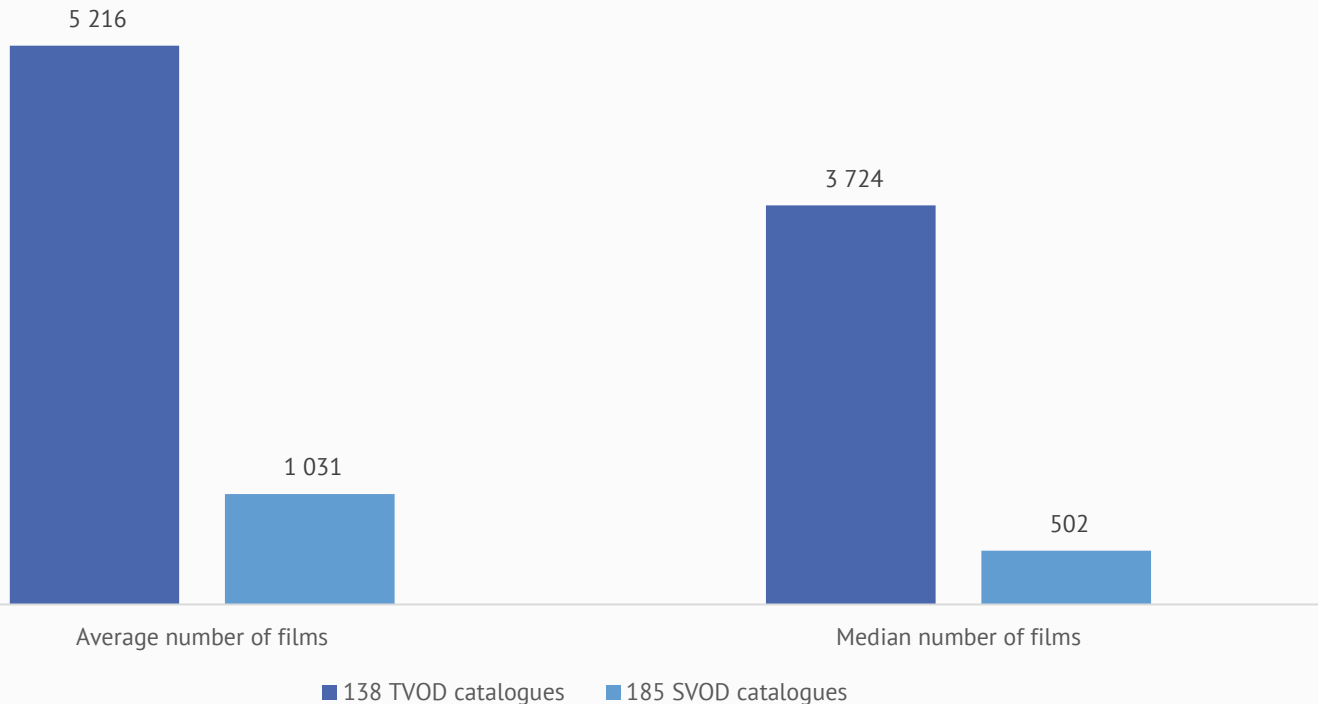
Huge variances in sizes of catalogues reflect different approaches – curation versus large choice

- ▶ While multi-country TVOD services seemed to focus on offering a large choice to their customers, proposing recent and catalogue films, several national TVOD and SVOD services had more a logic of curation.
- ▶ Minimum Guarantee for TVOD services and license fees for SVOD services might also be an economical criteria in proposing a fewer number of films.
- ▶ The bulk of films available on both TVOD and SVOD are less than 10 years old in 2020 with over 50% films produced in or after 2010.

Strong differences between TVOD and SVOD catalogues in the number of films

- ▶ The **median TVOD catalogue** had **more than 7 times** as many films than the **median SVOD catalogue**.
- ▶ On average, **TVOD catalogues** had **more than 5 times** as many films than **SVOD catalogues**.
- ▶ TVOD services were more film-focused whereas SVOD services relied more heavily on TV content.

Average and Median size of film catalogues by business model, in number of films

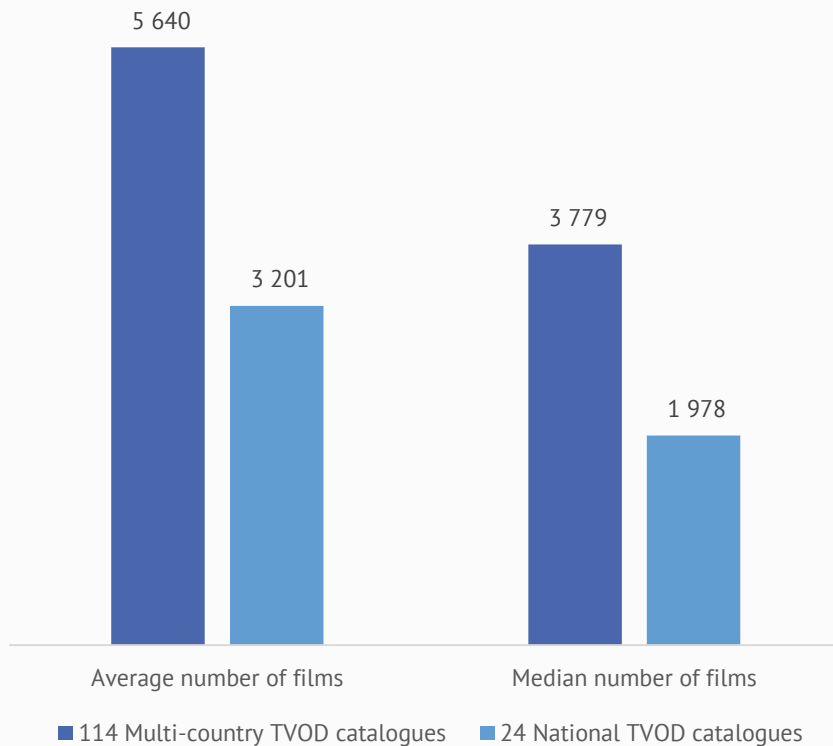


Source: JustWatch, Filmtoro, Chili, La Pantalla Digital, EUROVOD catalogue data

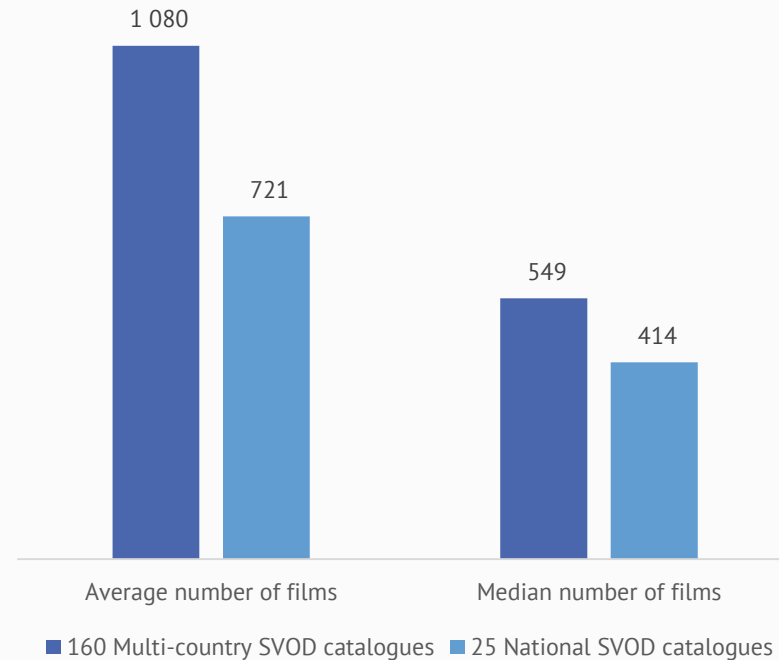
Also strong differences between national and multi-country catalogues

- ▶ Be it on TVOD or SVOD, **multi-country catalogues had a larger number of films than national services**, with an average difference of 2 439 films for TVOD services and 359 films for SVOD services.
- ▶ TVOD catalogues, multi-country and national, showed a larger film offer than SVOD catalogues.

Size of TVOD film catalogues, in number of films



Size of SVOD film catalogues, in number of films

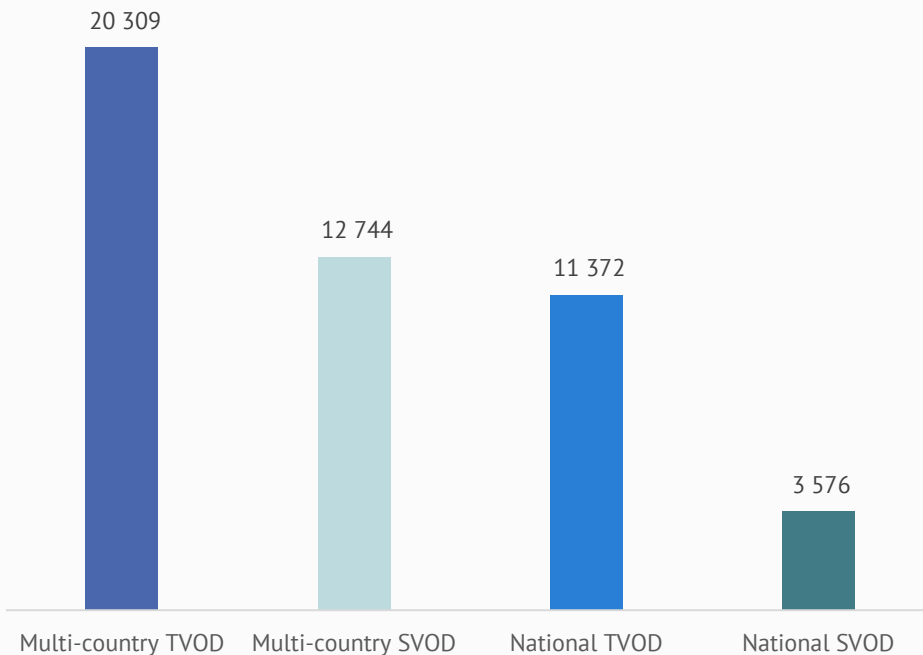


Source: JustWatch, Filmtoro, Chili, La Pantalla Digital, EUROVOD catalogue data

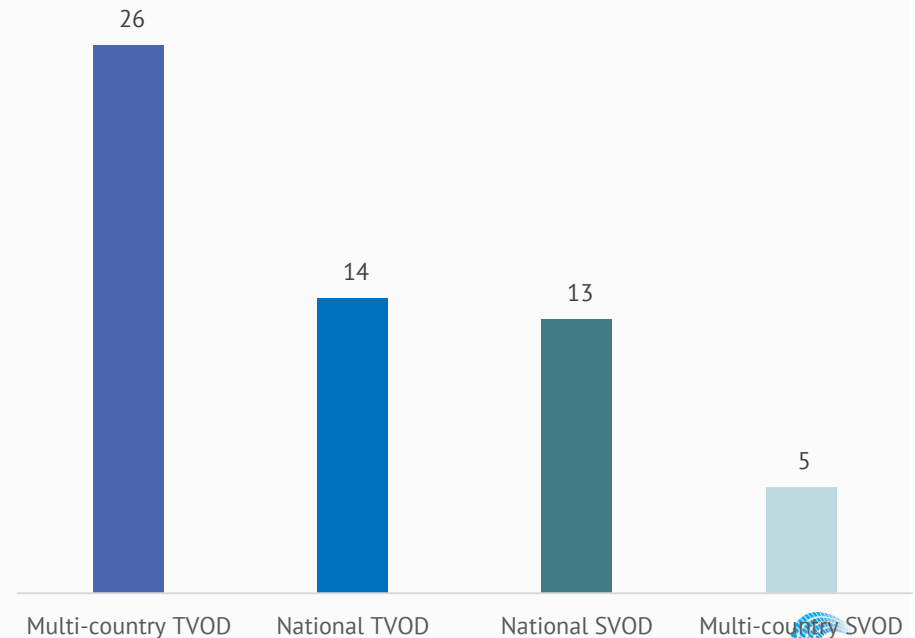
And huge disparities in the number of films for TVOD and SVOD services

- ▶ The maximum and minimum number of films show that **multi-country TVOD (and some SVOD) services were more focused on a high amount of films** than other service types.
- ▶ The disparities in the maximum and minimum number of films between the same types of services show however that some services might also have been **more focused on curation** of films or had an **offer more focused on other types of content** than films (TV content, niche content).

Maximum number of films in catalogue by business model



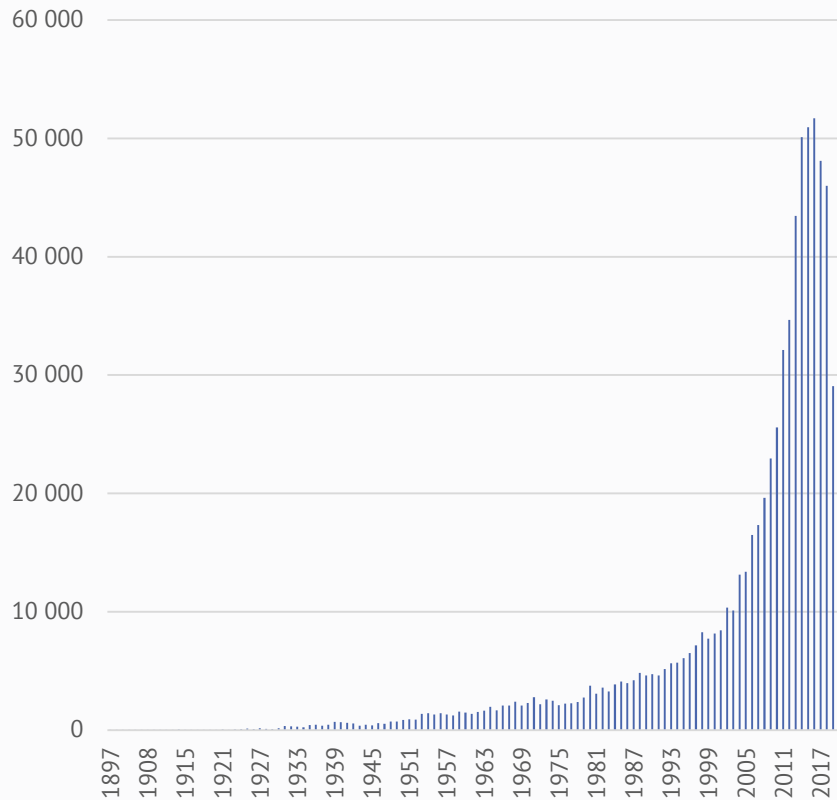
Minimum number of films in catalogue by business model



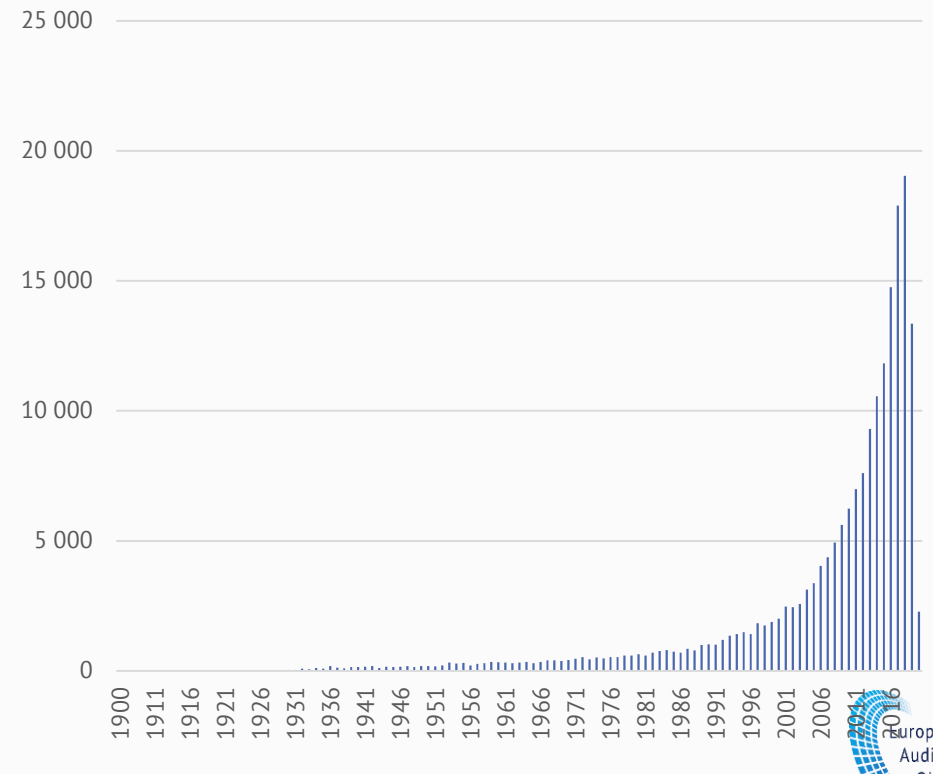
The bulk of films available on both TVOD and SVOD were less than 10 years old

- ▶ More than 50% of all films available on SVOD were produced in 2013 or later and 63% were less than 10 years old in 2020.
- ▶ More than 50% of all films available on TVOD were produced in 2012 or later and 58% were less than 10 years old in 2020.

TVOD - Number of films by production year



SVOD - Number of films by production year



B.2 – Unique film titles available in VOD catalogues

On TVOD and SVOD combined, over **75 000 unique film titles** were available

- ▶ EU27 unique film titles represented 36% of all unique film titles with 26 658 titles.
- ▶ US film titles were the most represented with 27 600 titles or 37% of overall unique titles.
- ▶ Other European titles made up 9%, with British titles making up 75% of all EUR OBS titles.

A larger choice of unique titles on TVOD

- ▶ With over 60 000 titles, TVOD services had a larger film title offer than SVOD services with 41 981 titles.

And also a larger offer of EU27 unique film titles on TVOD services

- ▶ With 38% of all unique titles being of EU27 origin, representing 22 648 unique film titles, TVOD services offered a larger choice than SVOD services' 12 838 unique EU27 film titles or 31% of all film titles available on SVOD.

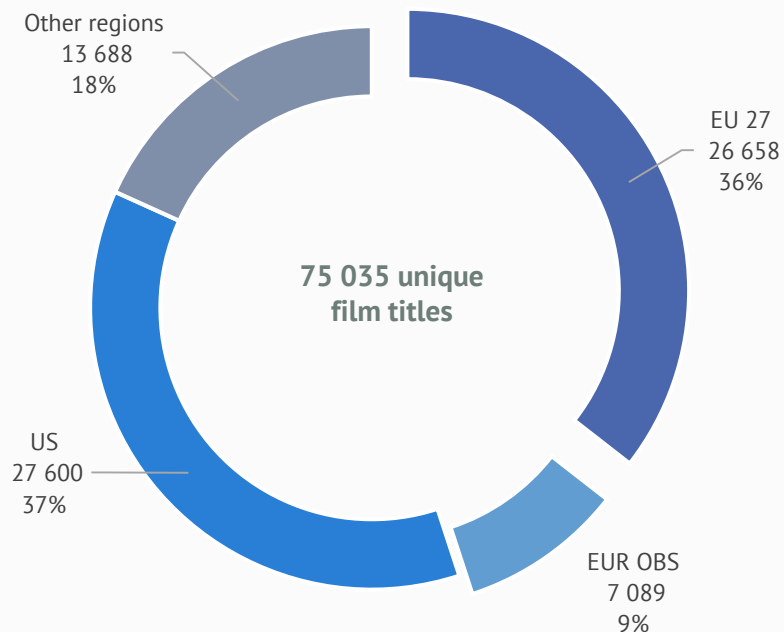
French, German, Italian and Spanish titles make up the bulk of EU titles, both on TVOD and SVOD

- ▶ With 28% of EU27 titles, French titles were the most found titles on TVOD, followed by German titles with 22%, Italian with 14% and Spanish with 8%.
- ▶ On SVOD, German titles represented 22% of all EU27 titles, French 18%, Italian 17% and Spanish 8%.
- ▶ The rest of the top production countries' origin of EU27 titles, both on TVOD and SVOD, were Belgian, Danish, Austrian, Swedish, Dutch, Czech and Polish titles.
- ▶ The rest of 16 EU countries made up 6% of all titles on TVOD and 8% on SVOD with just over 1 000 titles on both types of services.
- ▶ The top 11 EU27 countries produced 94% of all unique EU27 titles on TVOD and 92% on SVOD.

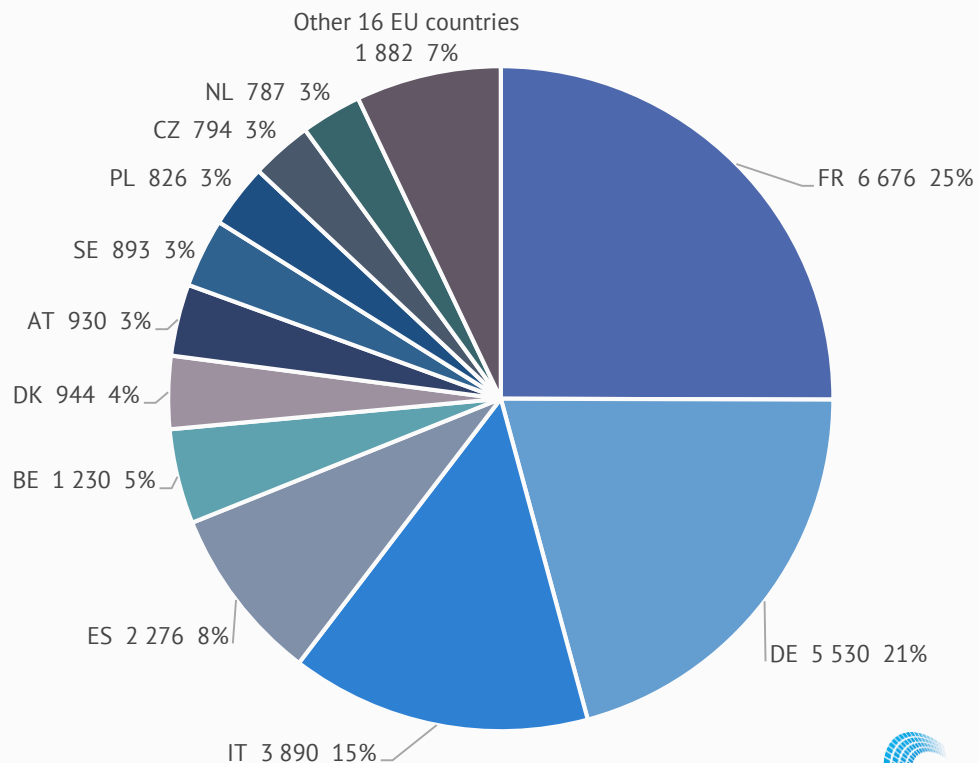
Total number of unique film titles available in VOD catalogues

- ▶ 75 035 unique film titles were available to customers on both types of services
- ▶ For EU27 films, French, German, Italian and Spanish titles represented 69% of all unique EU27 film titles.

Origin of **unique** film titles in VOD catalogues by region of origin



Origin of **unique** EU27 film titles in VOD catalogues by country of origin



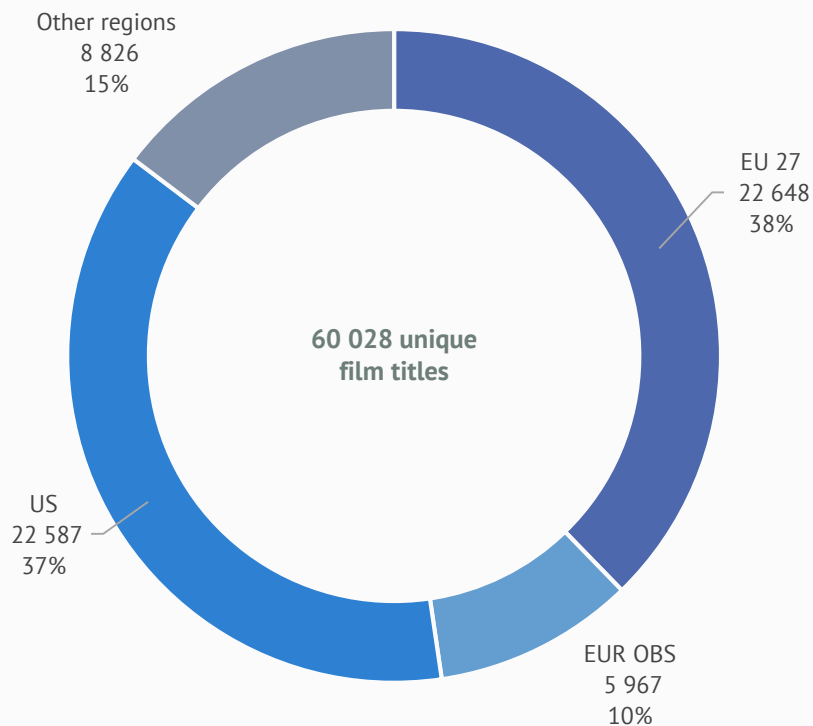
Source: JustWatch, Filmtoro, Chili, La Pantalla Digital, EUROVOD catalogue data

3 512 film titles could not be identified and have been excluded from the analysis. They represent 4,5% of all collected film titles.

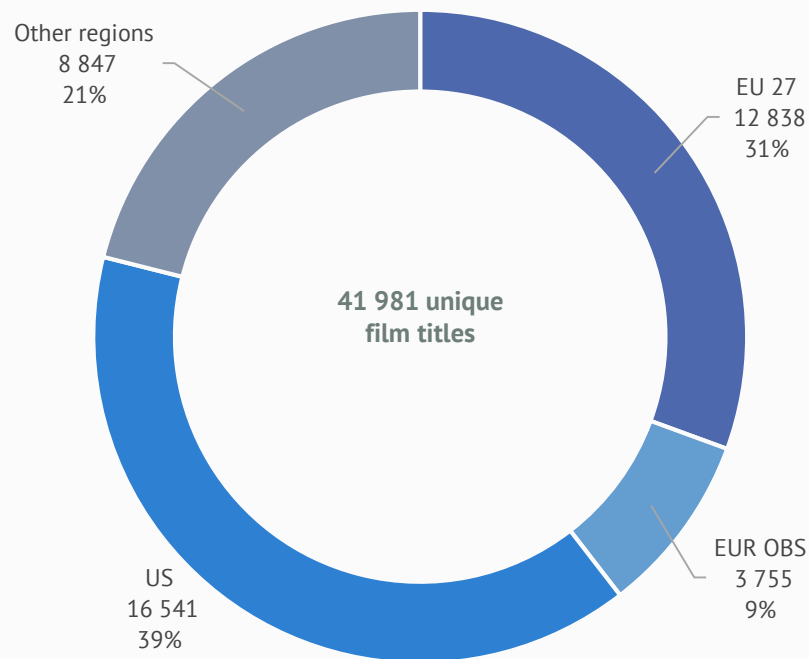
A larger choice of unique titles on VOD

- ▶ TVOD services offered the highest number of total unique films titles, with over 60 000 titles available.
- ▶ On TVOD services, EU27 unique film titles represented 38% of all unique titles, on SVOD 31%.
- ▶ On both types of services, US titles represented just under 40% of all titles.
- ▶ Other European titles, with the integration of British titles, made up around 10% on both types of services

Origin of unique film titles in TVOD catalogues



Origin of unique film titles in SVOD catalogues



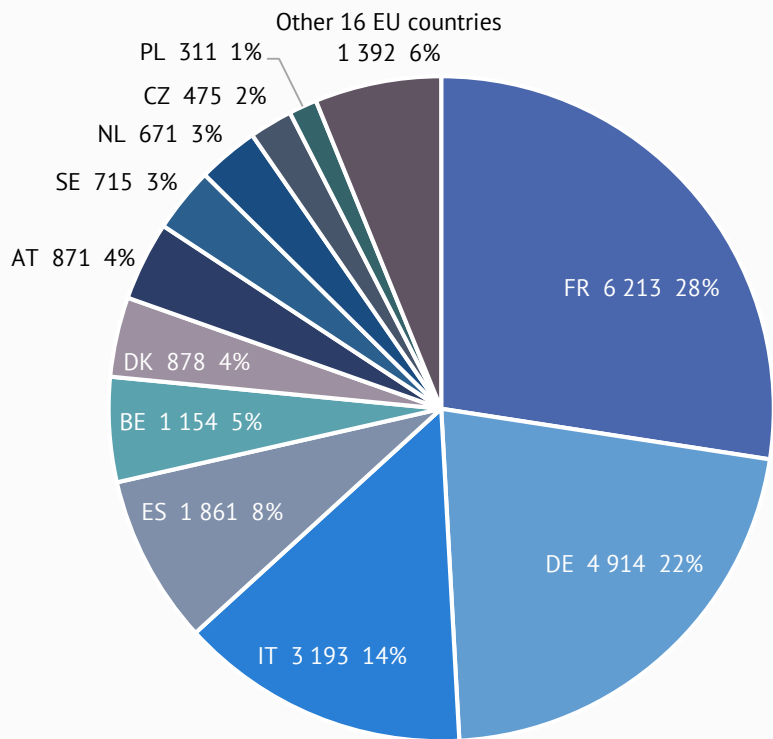
Source: JustWatch, Filmtoro, Chili, La Pantalla Digital, EUROVOD catalogue data

*On TVOD, 1 406 film titles have not been identified (2,2 % of all film titles), on SVOD the number of unidentified titles was 2 263 or 5,1 % of all titles. They have been excluded for the analysis.

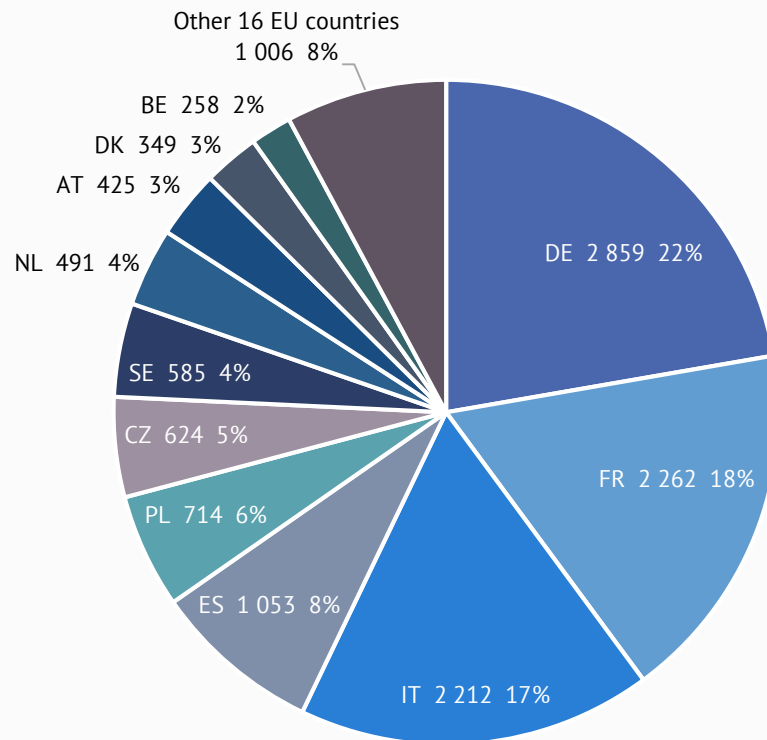
Differences in the origin of EU titles by business model

- ▶ On TVOD, French titles are the most represented EU27 titles while on SVOD German titles took the lead.
- ▶ The podium was completed for both business models by Italian titles and followed by Spanish titles.
- ▶ Also, the top 11 production countries were the same for both type of services and all the other 16 EU27 countries accounted for less than 10% of titles available.

Origin of unique EU27 film titles in TVOD catalogues



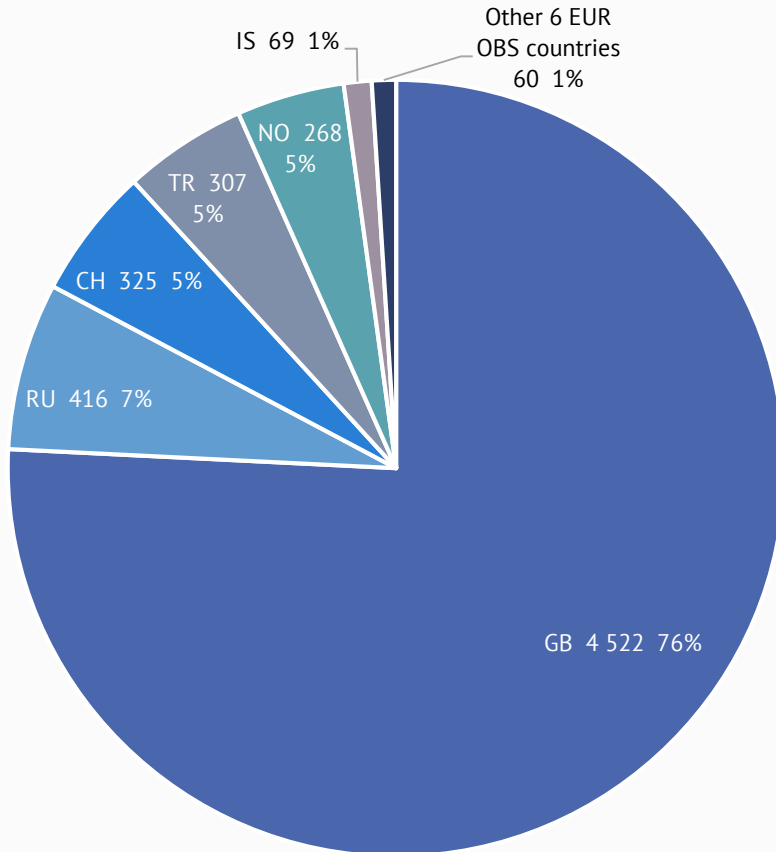
Origin of unique EU27 film titles in SVOD catalogues



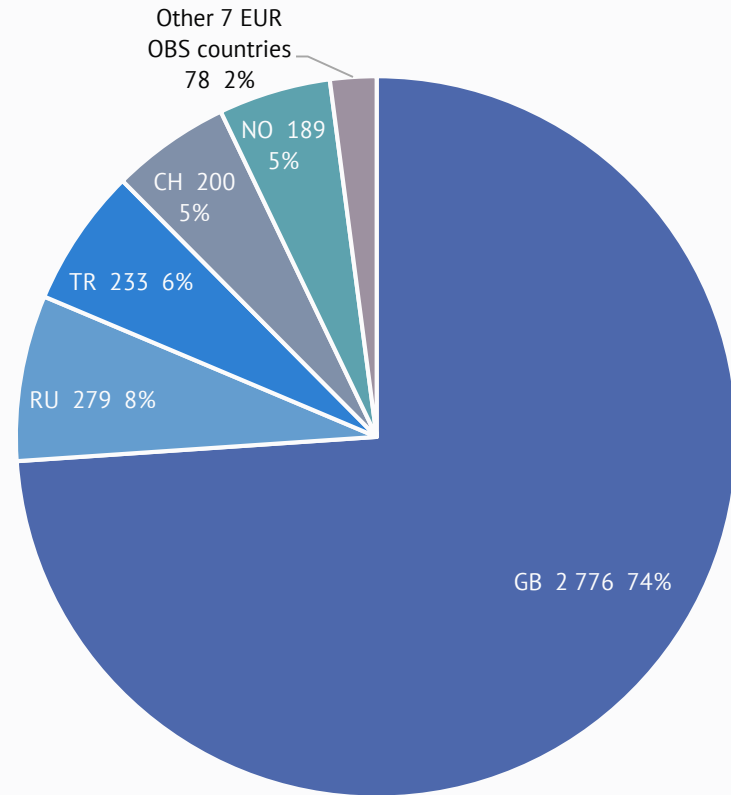
The importance of GB titles in other European film titles

- ▶ British titles represented for both types of services around $\frac{3}{4}$ of all other European titles available.
- ▶ Russian, Turkish, Swiss and Norwegian titles completed the Top 5 of other European titles.
- ▶ The shift of British titles from EU-28 to other European titles had also a significant impact on the share of EU27 titles for both types of services compared to previous reports on the share of EU films.

Origin of unique EUR OBS film titles in TVOD catalogues



Origin of unique EUR OBS film titles in SVOD catalogues



B.3 – Origin and circulation of films

21% of all films found in 138 TVOD and 185 SVOD catalogues were of EU27 origin

- ▶ Titles from other European countries made up 10% on TVOD and 8% on SVOD, mainly from the United Kingdom.
- ▶ US titles made up 58% of films on TVOD and 48% on SVOD.
- ▶ Films from other regions had a much larger share on SVOD with 23% than on TVOD with 11%.

For both business models, national services offered more EU27 films than multi-country services

- ▶ In the 24 national TVOD catalogues, EU27 films represented 43% of all films, on national 25 SVOD services their share was 40%.
- ▶ Other European films for both types of national services made up 9% of the film offering, here again largely composed of films of the United Kingdom.
- ▶ US films represented 38% of all films on national TVOD services and 42% on national SVOD services.

EU27 films on multi-country services made up 19% of all films in 114 TVOD catalogues and 160 SVOD catalogues

- ▶ Other European films accounted for 10% on TVOD and 8% on SVOD.
- ▶ US films accounted for the lion share with 60% on multi-country TVOD catalogues and 49% on SVOD.
- ▶ Films of other regions accounted for 11% on TVOD and 24% on SVOD.

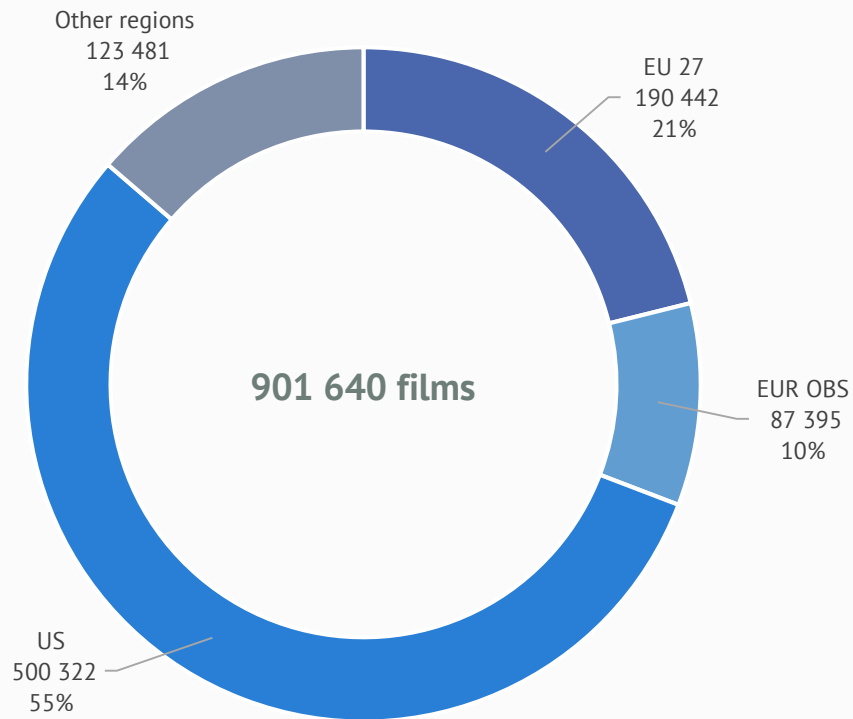
On average, an EU27 film title was available in 2,8 countries on TVOD and in 2,6 countries on SVOD

- ▶ Other European film titles were available on average in 5,5 countries on TVOD and 3,7 countries on SVOD.
- ▶ This circulation compares to 7,4 countries for US titles on TVOD and 4,7 countries on SVOD.
- ▶ On services, the circulation of EU27 titles was 6,5 TVOD services on average and 3 SVOD services on average compared to 17,3 TVOD services and 5,5 SVOD services for US titles.
- ▶ The circulation on SVOD services is also limited by the necessity to acquire rights for each country which is not the case for TVOD services.

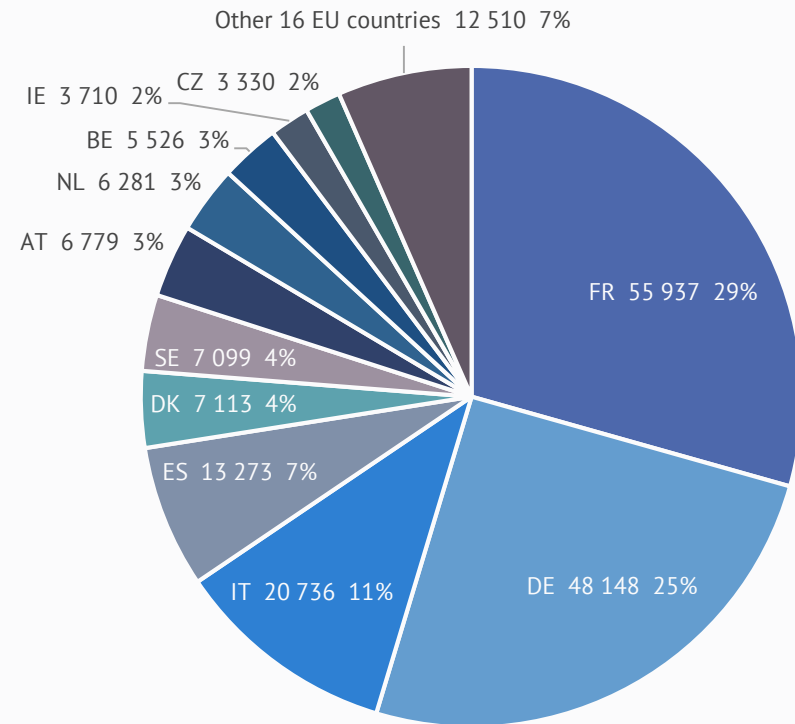
21% of all films in VOD catalogues (TVOD and SVOD) were of EU27 origin

- ▶ In total, over 901 640 films were available in the 323 VOD catalogues (TVOD and SVOD) of the sample.
- ▶ EU27 films represented 21% of all films available, while other European films accounted for 10%.
- ▶ The biggest EU27 production countries were France with 29% of all EU27 films, followed by Germany with 25%, Italy with 11% and Spain 7%. These 4 countries accounted for 72% of all EU27 available in the 323 VOD catalogues.
- ▶ US films with 55% accounted for the lion share of films available in VOD catalogues.

Origin of films in 323 VOD catalogues



Origin of EU27 films in 323 VOD catalogues by country of origin



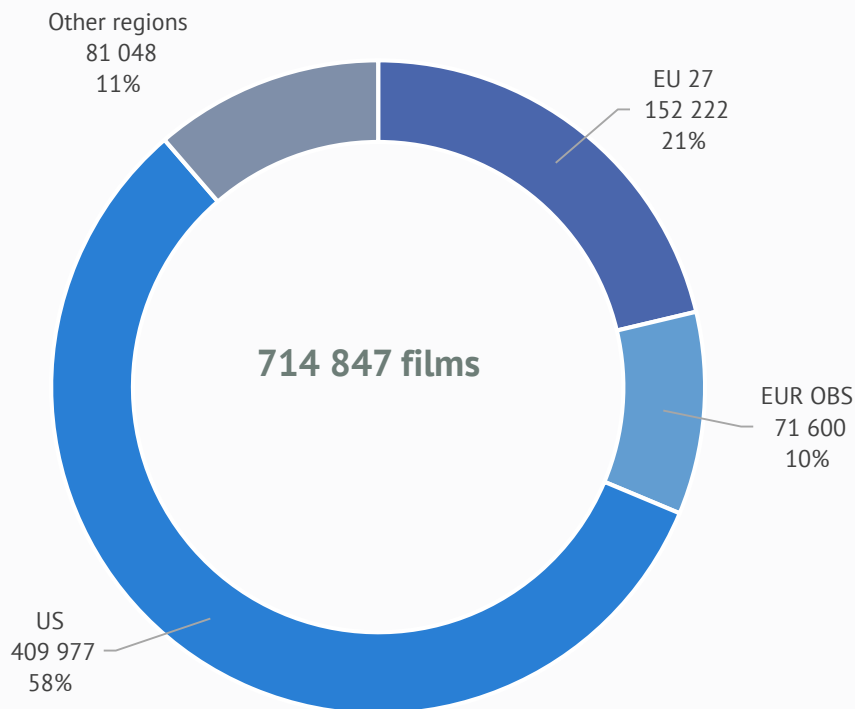
Source: JustWatch, Filmtoro, Chili, La Pantalla Digital, EUROVOD catalogue data

On TVOD, 4 996 films have not been identified (0,7% of all films), on SVOD the number of unidentified films was 3 910 or 2,1% of all films. They have been excluded for the analysis.

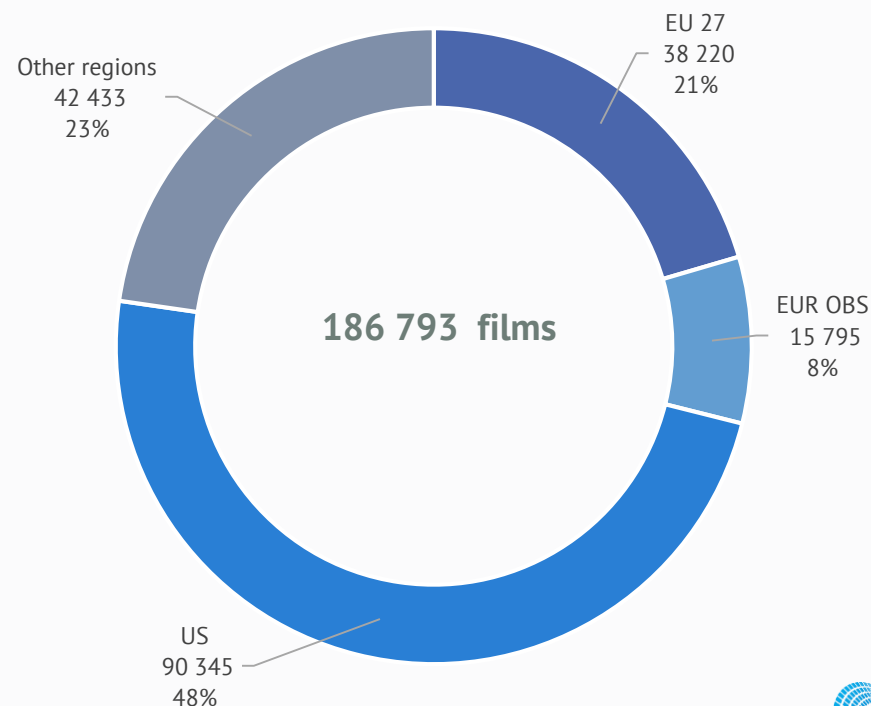
21% of all films on TVOD and SVOD are of EU27 origin

- ▶ In terms of availability, EU27 films represented 21% in all TVOD catalogues and 21% in SVOD catalogues
- ▶ Other European films represented 10% of all films on TVOD and 8% on SVOD services
- ▶ US films had a higher share in TVOD catalogues with 58% of all films and 48% in SVOD catalogues
- ▶ Films of other regions were better represented in SVOD catalogues with 23% compared to 11% in TVOD catalogues, showing the increased reliance of SVOD services on productions from around the world to complete their catalogues.

Origin of films in 138 TVOD catalogues



Origin of films in 185 SVOD catalogues



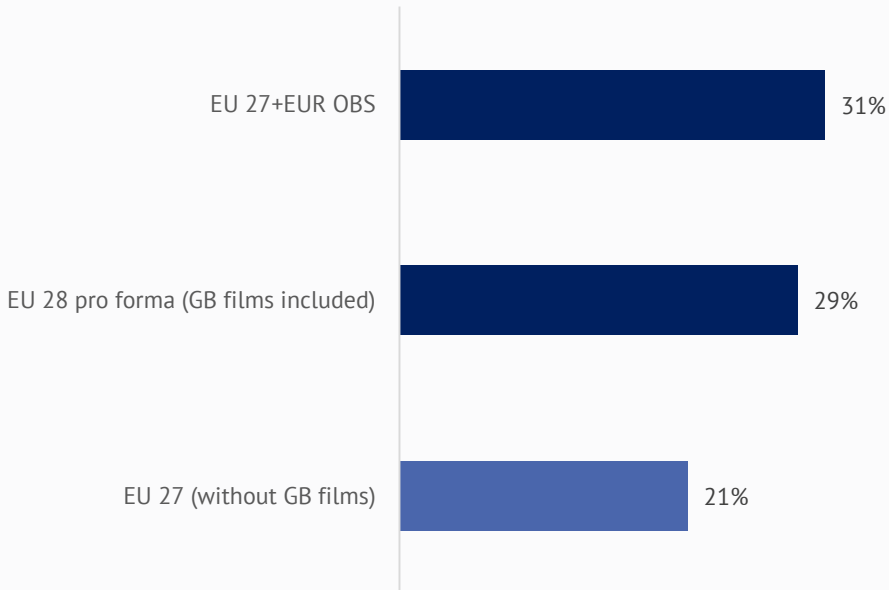
Source: JustWatch, Filmtoro, Chili, La Pantalla Digital, EUROVOD catalogue data

On TVOD, 4 996 films have not been identified (0,7% of all films), on SVOD the number of unidentified films was 3 910 or 2,1% of all films. They have been excluded for the analysis.

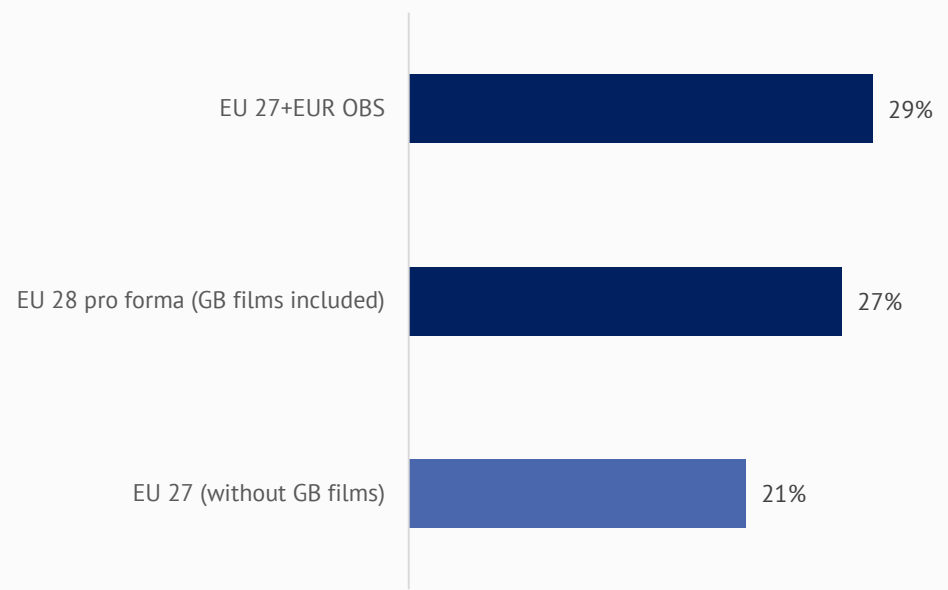
The difference between the share of EU27 and the share of all European films is significant

- ▶ The share of European films varies strongly depending on which countries qualify as “European films”.
- ▶ If only EU27 countries are considered the share of European films was 21% for TVOD and SVOD.
- ▶ If other European countries are taken into consideration, the share is 31% for TVOD and 29% for SVOD.
- ▶ Compared to the pro forma share of EU28 films, the share of EU27 films is decreased by 8% for TVOD and 6% for SVOD.

Origin of films in 138 TVOD catalogues



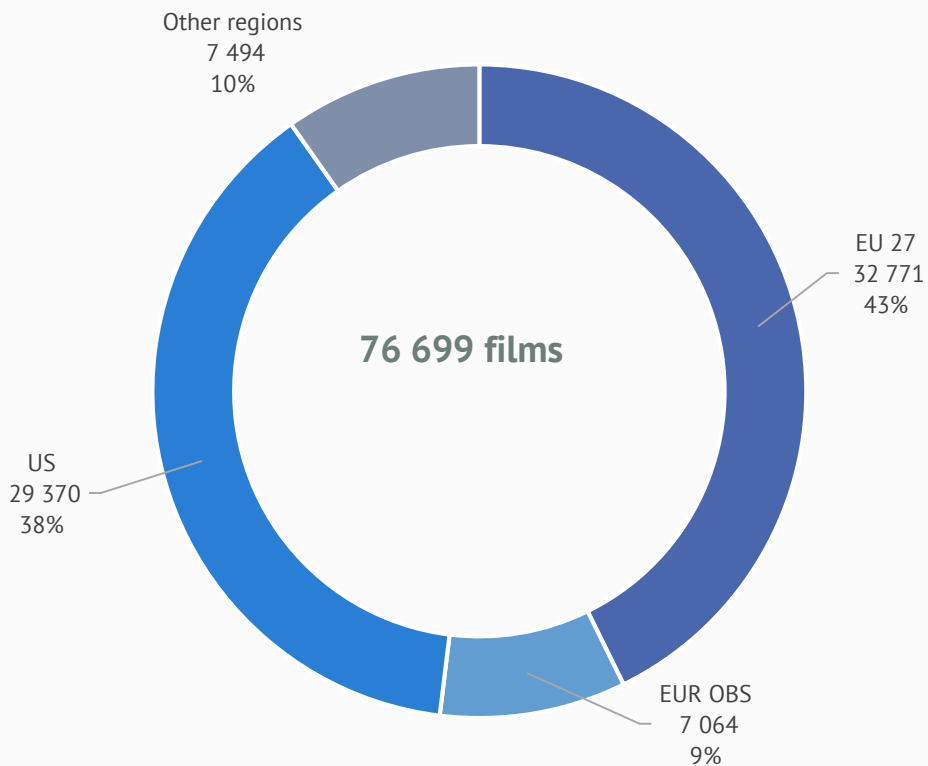
Origin of films in 185 SVOD catalogues



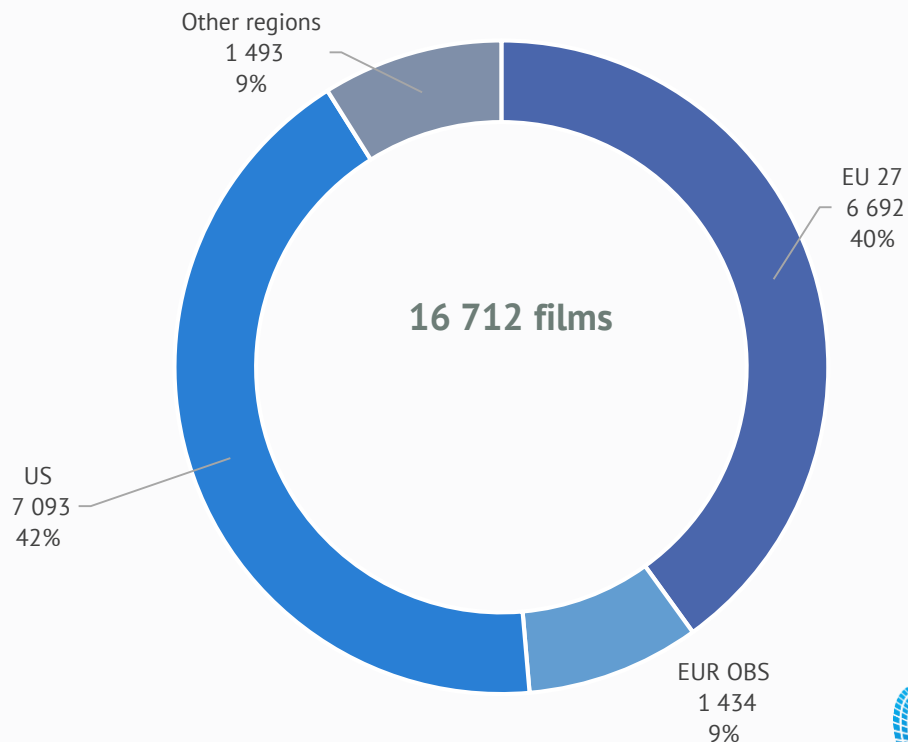
National services had a high share of EU27 films

- ▶ **National services**, TVOD and SVOD, relied more on EU27 films to cater to national audiences than multi-country services.
- ▶ National TVOD and SVOD services complemented their film offering with films from other European countries and other regions.
- ▶ The reliance on US films was also lesser for national services than multi-country services.

Origin of films in 24 national TVOD catalogues



Origin of films in 25 national SVOD catalogues

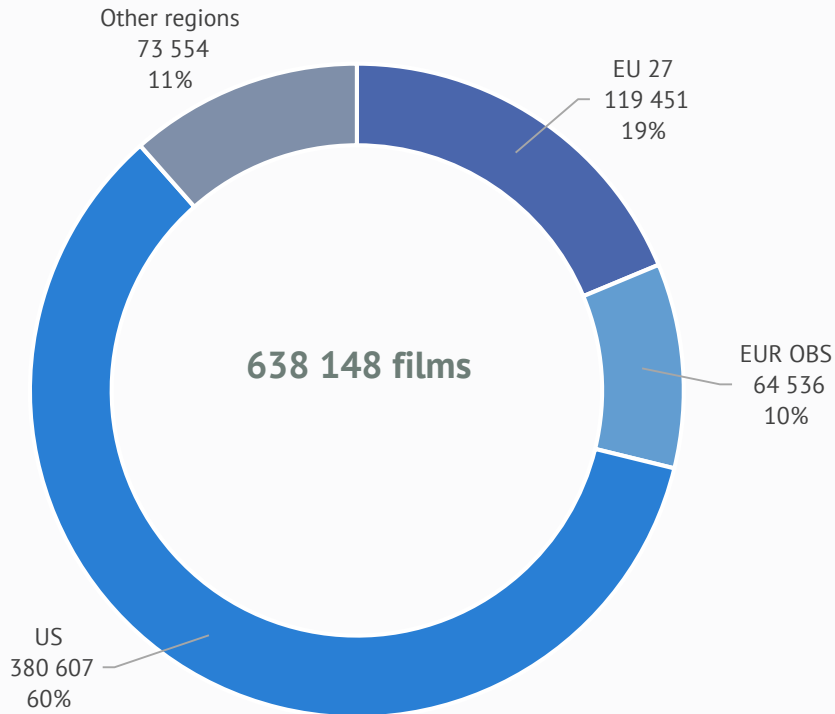


Source: JustWatch, Filmtoro, Chili, La Pantalla Digital, EUROVOD catalogue data

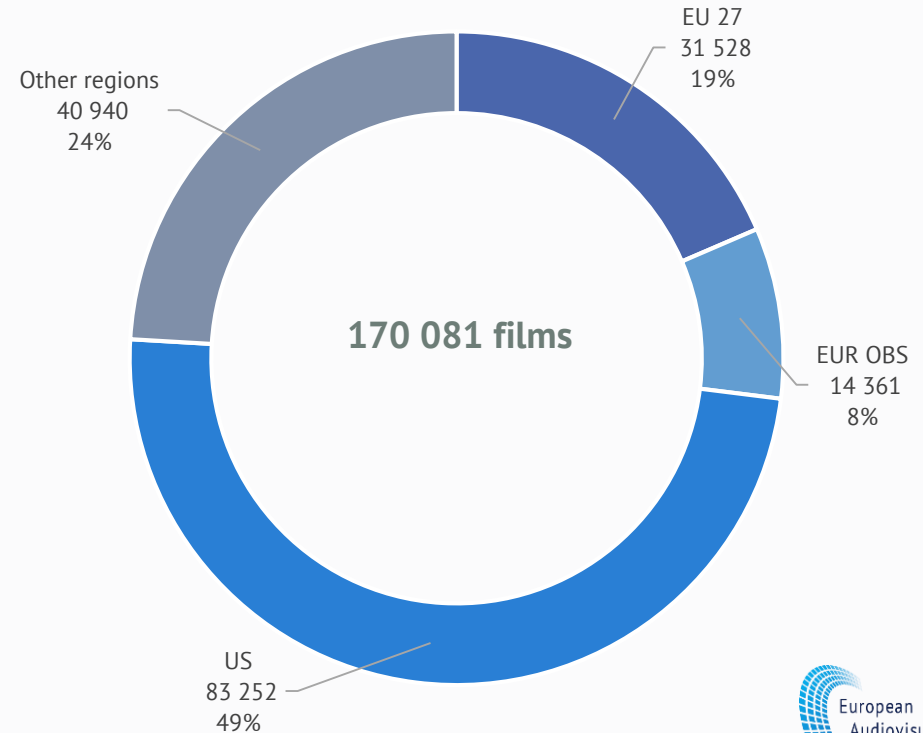
While multi-country services rely more on US films and less on EU27 films

- ▶ Multi-country TVOD services relied more on US films than SVOD services, with a share of 60% for TVOD and 49% for SVOD.
- ▶ EU27 films represented 19% of all films on multi-country TVOD and SVOD services.
- ▶ SVOD catalogues had a relatively high share of films of other regions with 24%, compared to TVOD's 11%.

Origin of films in 114 multi-country TVOD catalogues



Origin of films in 160 multi-country SVOD catalogues

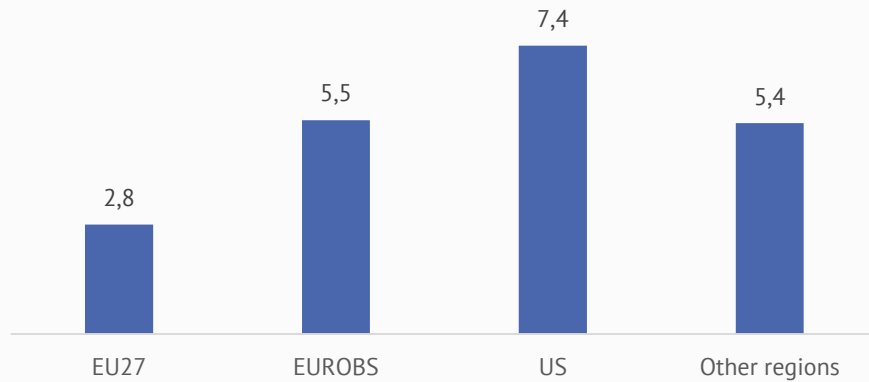


Source: JustWatch, Filmtoro, Chili, La Pantalla Digital, EUROVOD catalogue data

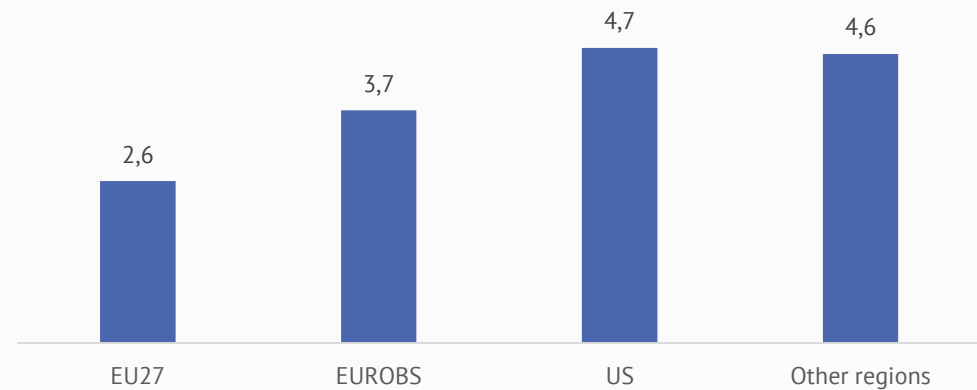
Lower percentages of EU27 films is explained by a lesser title circulation in countries

- ▶ The lower share of **EU films in total compared to their share of unique films** (21% of all films on TVOD compared to 38% of all titles; 21% of all films on SVOD compared to 31% of all titles) **is explained by their lower circulation in countries**, with an average of 2,8 countries on TVOD and 2,6 on SVOD.
- ▶ **US and films of other regions travelled the best**, crossing borders more easily than EU27 films.

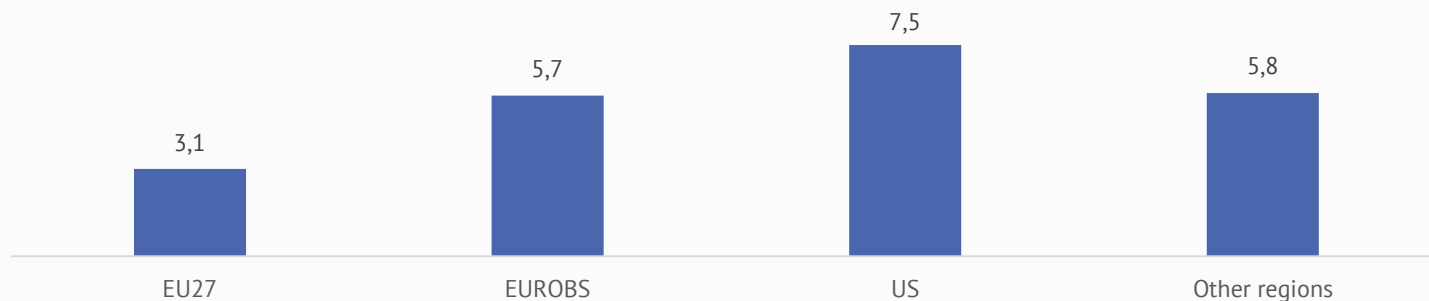
TVOD – Average circulation of titles in countries by region of origin



SVOD – Average circulation of titles in countries by region of origin



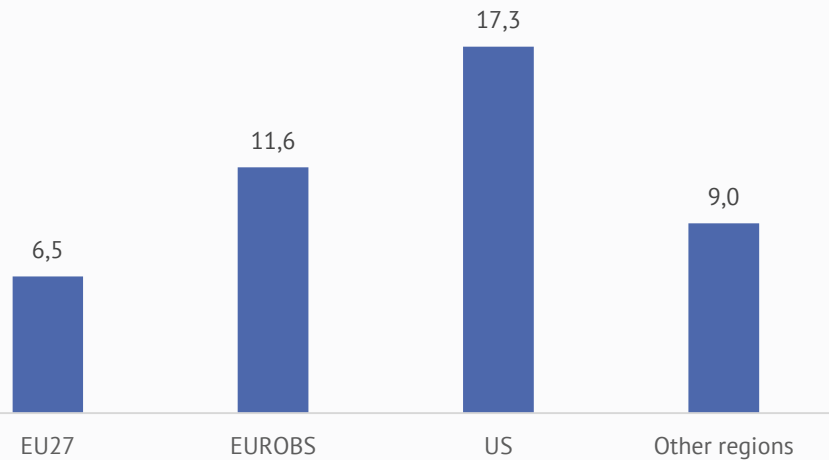
All VOD services – Average circulation of titles in countries by region of origin



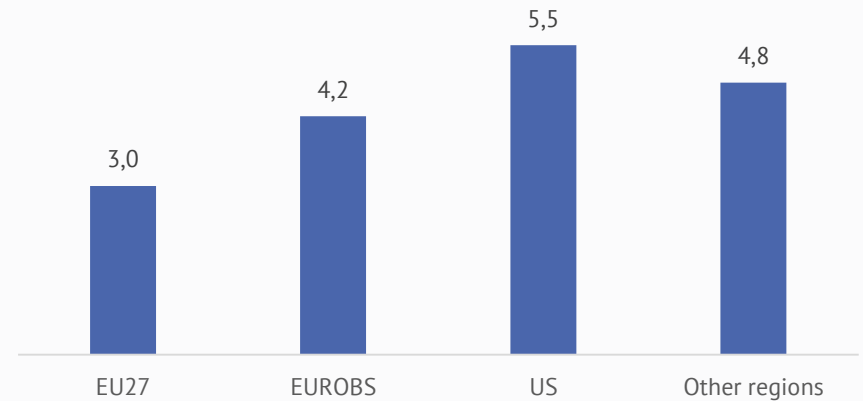
And on services, EU27 titles tend to circulate less than titles of other regions

- ▶ On average, EU films were present in 6,5 TVOD catalogues and 3 SVOD catalogues, less than films of all other regions.
- ▶ US films circulated the best also on services, followed by other European films and films of other regions for all VOD services.

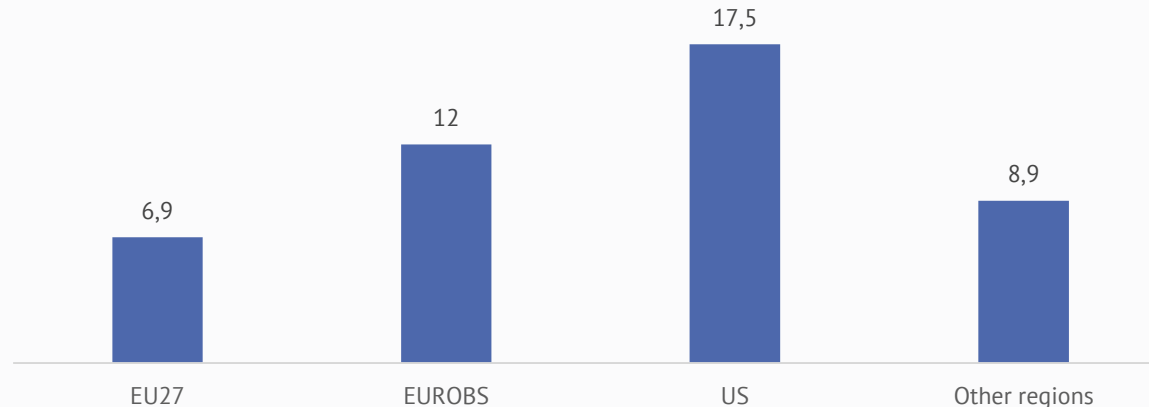
TVOD – Average circulation of titles on services by region of origin



SVOD – Average circulation of titles on services by region of origin



All VOD services – Average circulation of titles on services by region of origin



Source: JustWatch, Filmtoro, Chili, La Pantalla Digital, EUROVOD catalogue data

B.4 – Focus on services' core business and ownership

Services owned by tech had the highest number of films in their catalogues, followed by pure VOD players

- ▶ 70% of all films found on TVOD were on services owned by tech companies (Apple, Microsoft, Google, Amazon) and 35% of all films found on SVOD were on services owned by tech players (Amazon, Apple).
- ▶ 30% of all films were found on SVOD services owned by pure VOD players (Netflix, MUBI, Filmin, FilmoTV) and 13% on TVOD (FilmDoo, Chili, Flimmit).

The origin of films in catalogues varies by the core business of service owner

- ▶ On TVOD and SVOD, services owned by film distributors and TV players had the largest share of EU27 films in their catalogues, while the lowest share was found in the catalogues of tech players.
- ▶ Services owned by tech, telecom and private equity players had the highest share of US films.
- ▶ On SVOD, tech and pure VOD players had also the highest share of films of other regions.

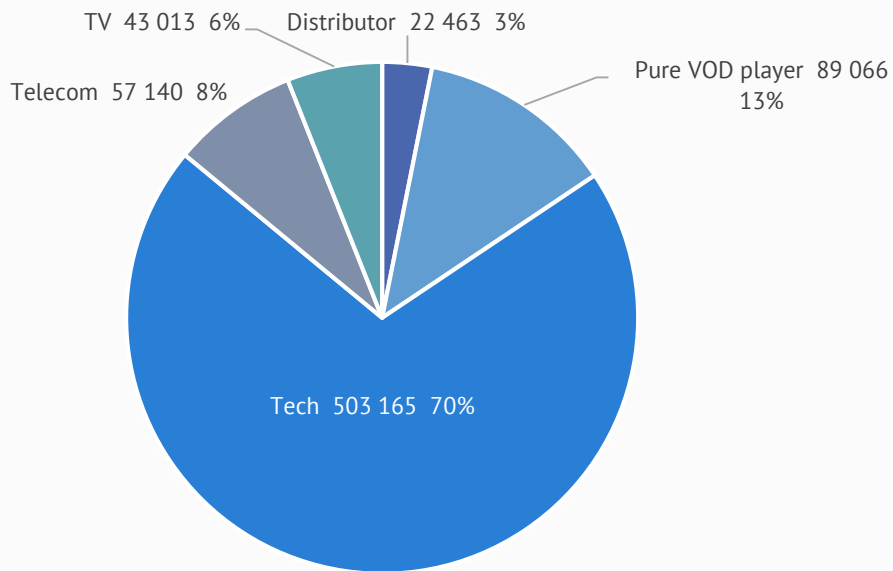
Services owned by EU players had the highest share of EU films while services owned by global players offered the largest number of films

- ▶ EU owned catalogues had on average a 34% share (TVOD) and a 37% share (SVOD) of EU27 films, while global services had a 17% share (TVOD) and a 16% share (SVOD) of EU27 films.
- ▶ With almost 3 times more films on TVOD and 4 times more films on SVOD, global players had a larger film offering than catalogues owned by EU players.
- ▶ Therefore, in absolute numbers, more EU27 films were available on services owned by global players than on EU27 players.

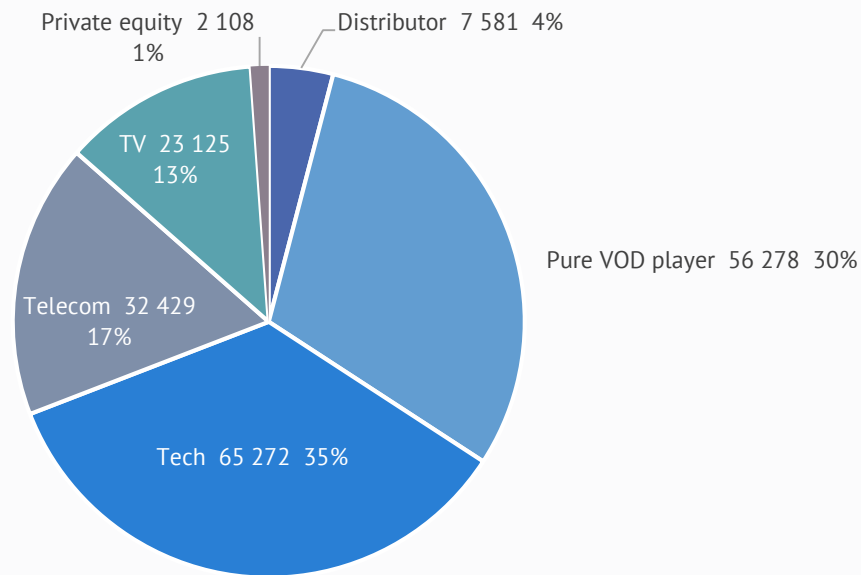
Services owned by tech players had the highest number of films in their catalogues

▶ Tech and pure VOD players such as Netflix had the highest number of films in their catalogues.

TVOD – Number of films by core business of service owner



SVOD – Number of films by core business of service owner



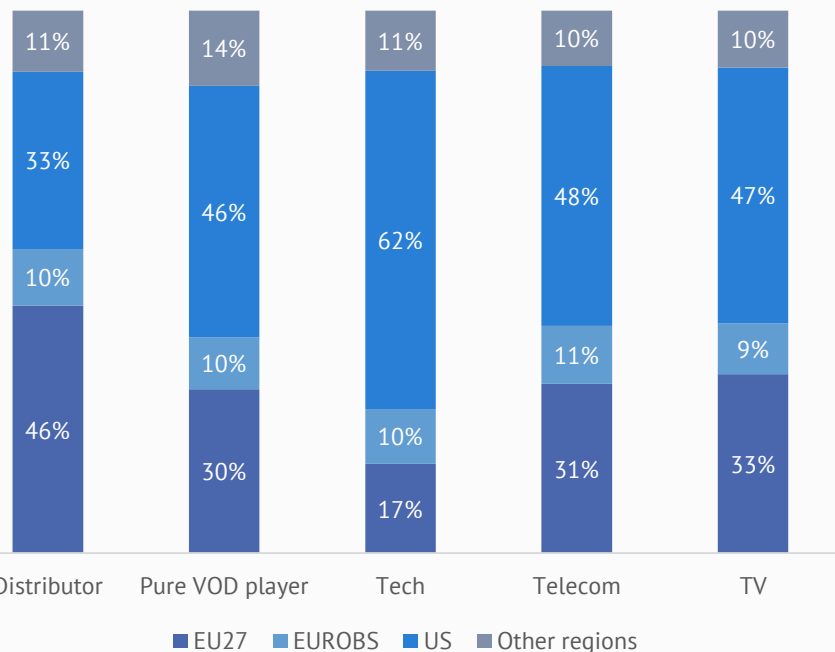
Core business	Number of TVOD catalogues	Average number of films/catalogue	Number of SVOD catalogues	Average number of films/catalogue
Distributor	12	1 872	22	345
Pure VOD player	37	2 407	47	1 197
Tech	71	7 087	50	1 305
Telecom	11	5 195	29	1 118
TV	7	6 145	33	701
Private equity			4	527

Source: JustWatch, Filmtoro, Chili, La Pantalla Digital, EUROVOD catalogue data

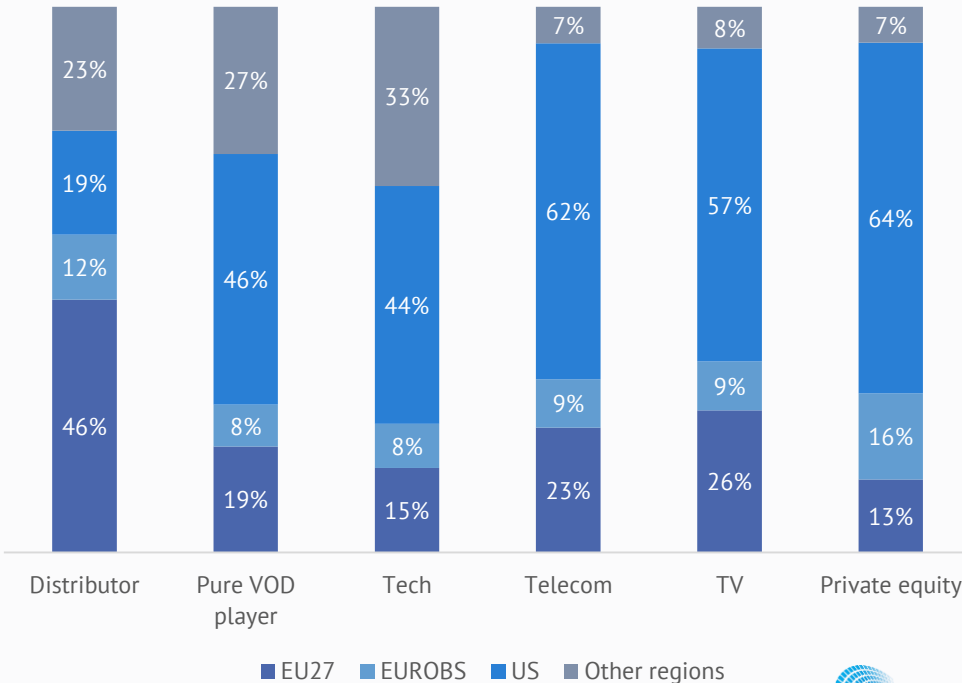
Sharp differences in the composition of catalogues by core business of service owners

- ▶ Services owned by film distributors, TV and telecom players had the highest share of EU27 films.
- ▶ Tech and private equity players offered the smallest share of EU27 films.
- ▶ The highest share of US films were found on SVOD services operated by telecom and private equity players on SVOD and tech players on TVOD.

TVOD – Share of films by core business of service owner



SVOD – Share of films by core business of service owner

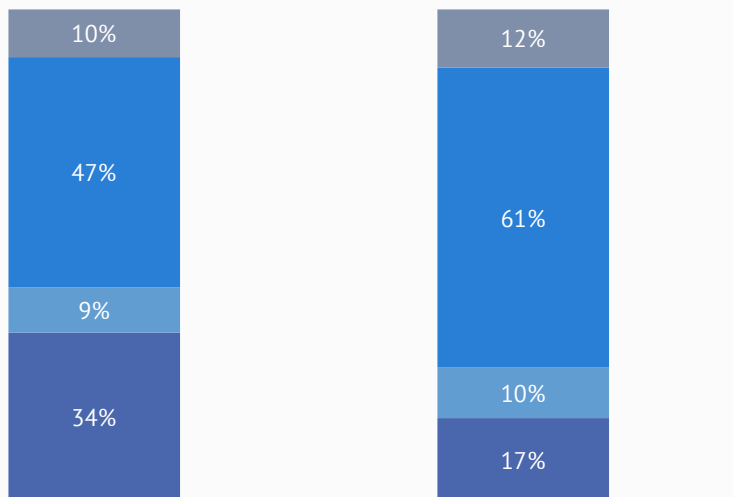


Source: JustWatch, Filmtoro, Chili, La Pantalla Digital, EUROVOD catalogue data

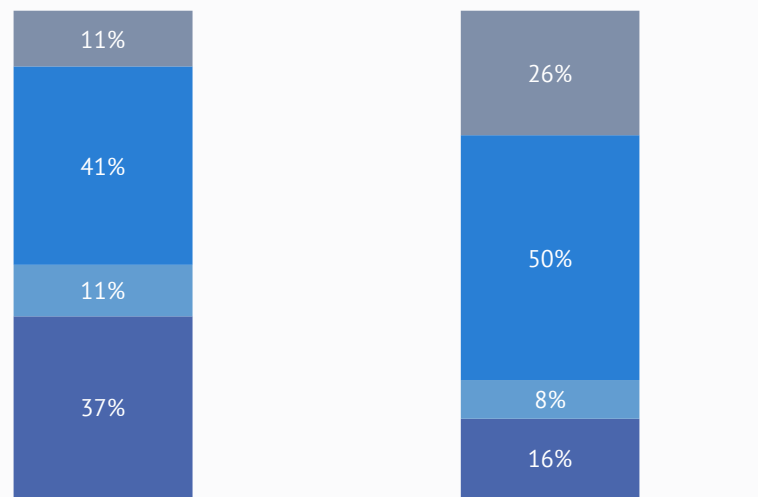
Higher share of EU27 films for EU27 owned services...

The share of EU27 films in the catalogues of EU27 owned services was higher, with 34% on TVOD and 37% on SVOD while global services had a share of EU27 films of 17% on TVOD and 16% on SVOD.

TVOD – Share of films by origin of service owner



SVOD – Share of films by origin of service owner



■ EU27 ■ EUROBS ■ US ■ Other regions

■ EU27 ■ EUROBS ■ US ■ Other regions

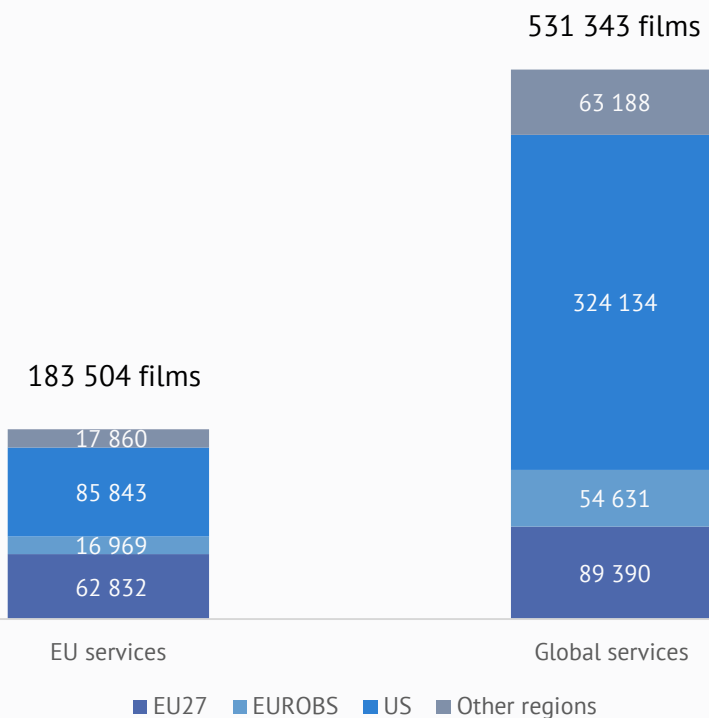
Origin of service owner	Number of TVOD catalogues	Average number of films/catalogue	Number of SVOD catalogues	Average number of films/catalogue
EU	37	4 960	51	730
Global	101	5 261	134	1 116

Source:
JustWatch,
Filmtoro, La
Pantalla Digital,
EUROVOD
catalogue data

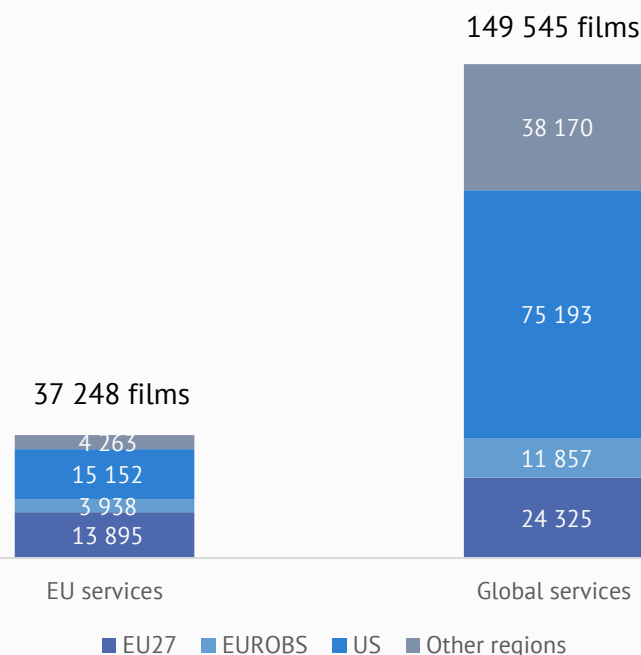
But the total offer of EU27 films was higher for global services

▶ From an absolute numbers point of view, **global services offered more films** and thus also **more EU27 films than EU owned services.**

TVOD – Number of films by origin of service owner



SVOD – Number of films by origin of service owner



B.5 – Composition of catalogues by national and EU27 non-national films

On TVOD, 36% of all EU27 films were of national origin, 27% on SVOD

- ▶ **EU27 non-national films were the main source** of EU films for both types of services.
- ▶ The share of **national films was of course higher in the catalogues of larger film producing countries** of the EU27.

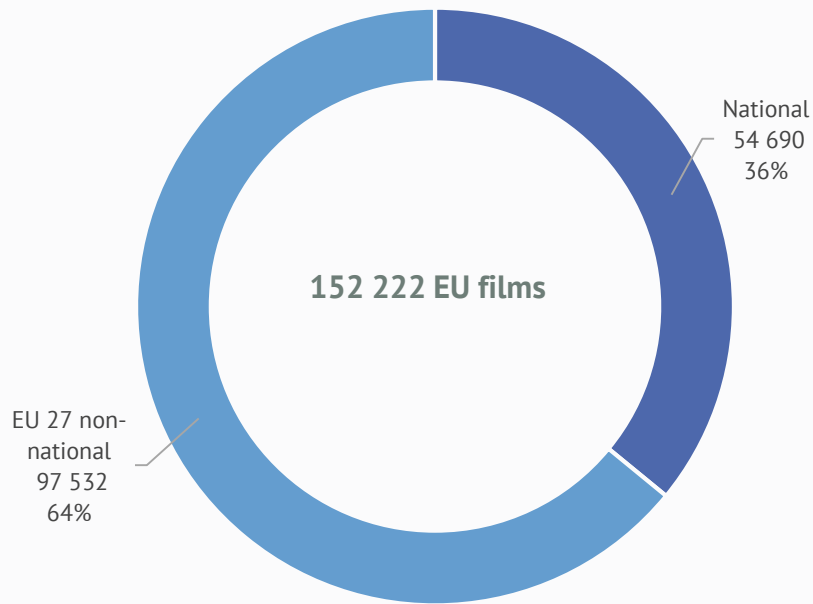
Both on TVOD and SVOD, national services had a much higher share of national films than multi-country services, which relied more on EU27 non-national films for their EU27 film offering

- ▶ With a share of 58% of national films of EU27 films on TVOD and 53% on SVOD, national services had a higher share of national film offering.
- ▶ For multi-country services, national films represented 30% of all EU27 films on TVOD and 22% on SVOD.
- ▶ This shows that national services, for TVOD and SVOD, tended to cater to national tastes in their film offering for EU27 film content.

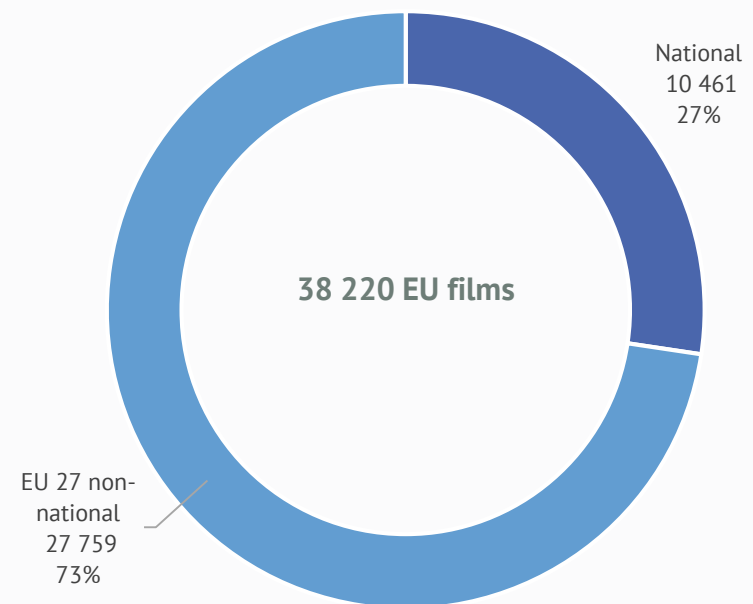
What was the split between national and EU27 non-national films?

- ▶ On TVOD, national films had a higher share than EU27 non-national films compared to SVOD.
- ▶ For both business models, EU27 non-national films represented the main source for EU27 films with 64% of all EU27 films on TVOD and 73% on SVOD.

TVOD - Split of national and EU27 non-national films



SVOD - Split of national and EU27 non-national films

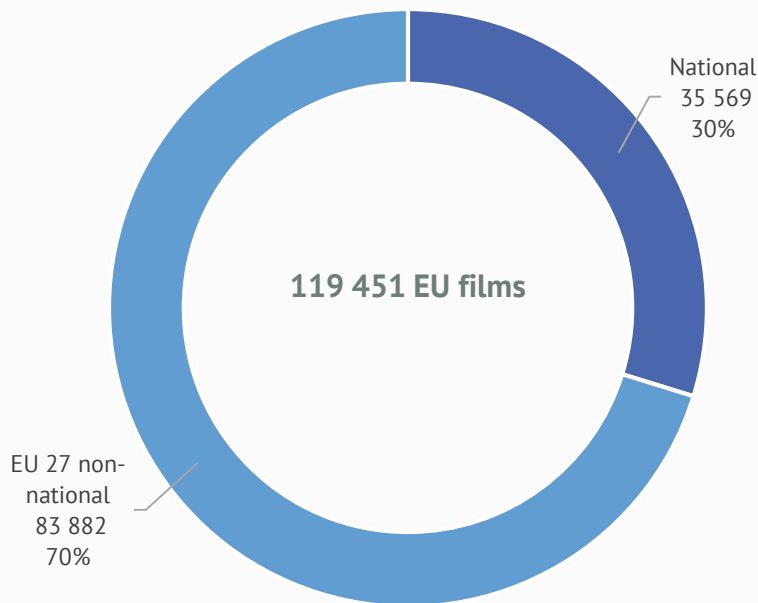


Source: JustWatch, Filmtoro, Chili, La Pantalla Digital, EUROVOD catalogue data

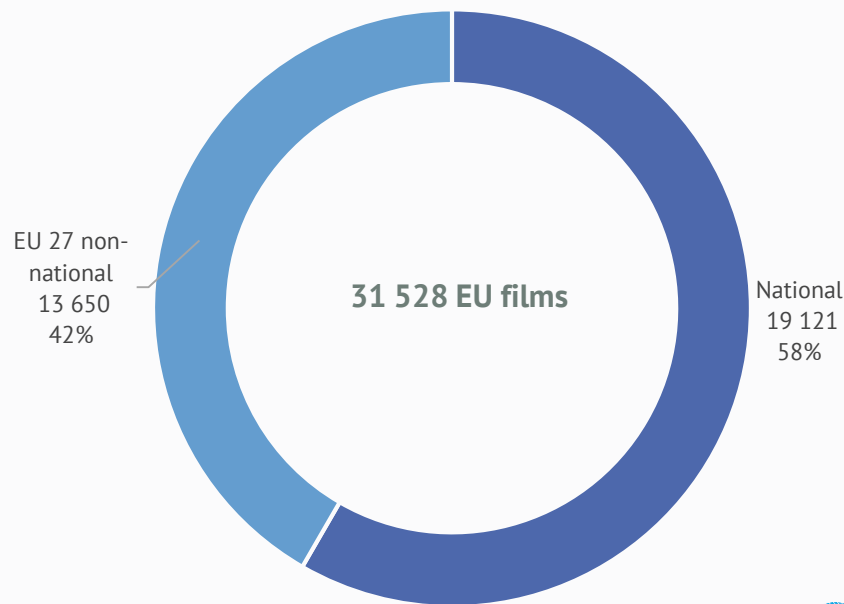
Differences between multi-country and national catalogues

- ▶ On TVOD, national services had a higher share than multi-country services of national films in their EU27 film offering.
- ▶ On the other hand, multi-country services offered more EU films and thus also more national films.
- ▶ National films represent the main EU27 film offering for national TVOD services.

TVOD multi-country services
- Split of national and EU27 non-national films



TVOD national services
- Split of national and EU27 non-national films

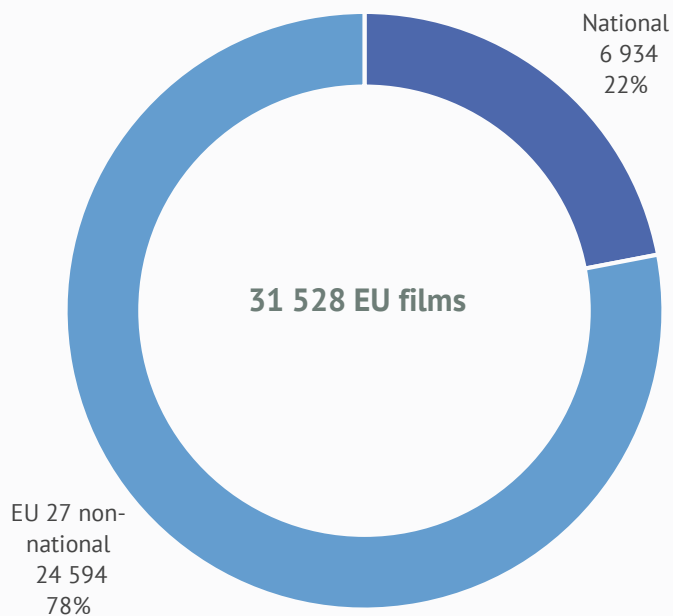


Source: JustWatch, Filmtoro, Chili, La Pantalla Digital, EUROVOD catalogue data

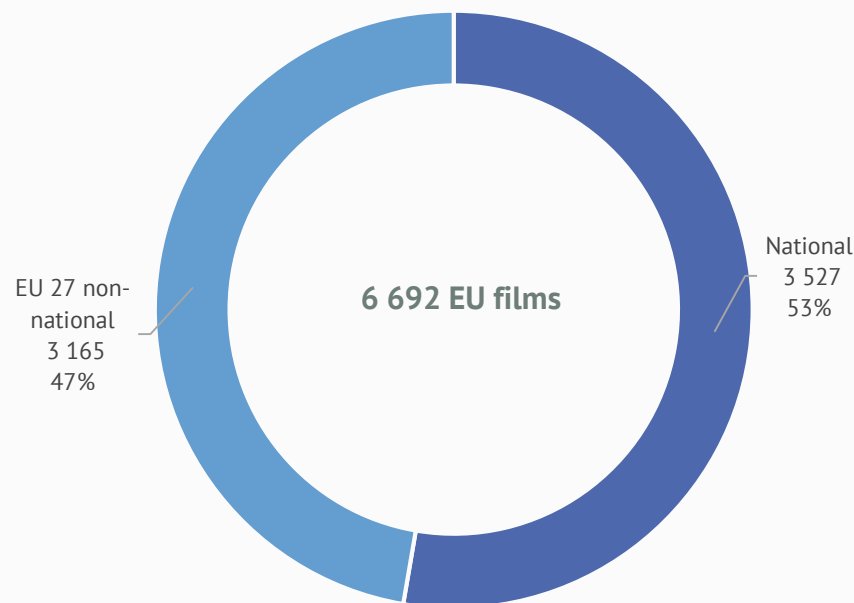
What is the split between national and EU27 non-national films?

- ▶ On SVOD, national services relied also more on national films for their EU27 film offering with a 53% share of national films.
- ▶ As on TVOD, multi-country services offered more EU films and thus also more national films.
- ▶ EU27 non-national accounted for more than $\frac{3}{4}$ of the EU27 film offering for multi-country services.

SVOD multi-country services –
Split of national and EU27 non-national films



SVOD national services –
Split of national and EU27 non-national films



B.6 – Focus on the export of EU27 films in the EU27, on TVOD and SVOD

Only EU27 non-national films were considered

French films were the most exported films on TVOD and SVOD, making respectively up 30% and 26% of all exported EU27 films

- ▶ German films ranked second with 22% of all exported films on TVOD and 19% on SVOD.
- ▶ Italian films were the third most exported EU27 films on TVOD while Spanish films ranked third on SVOD.
- ▶ EU-4 (France, Germany, Italy and Spain) films represented 68% of all EU27 film exports on TVOD and 66% on SVOD.
- ▶ Spanish film titles circulated the best among these EU-4 titles with on average 4,1 export countries on TVOD and 5,2 on SVOD.

French films were the most exported EU27 films on national and multi-country services, on TVOD and on SVOD

- ▶ With 31% and 33% of all exported EU27 films in national TVOD and SVOD catalogues, French films were the first source of imported films on national services.
- ▶ They were also the first source of EU27 non-national films on multi-country services, with 30% on TVOD and 25% on SVOD.

Films from EU27 smaller film producing countries represented a much smaller share of EU27 film exports but when these titles countries managed to get exported, they circulated better on average than titles from larger producing countries

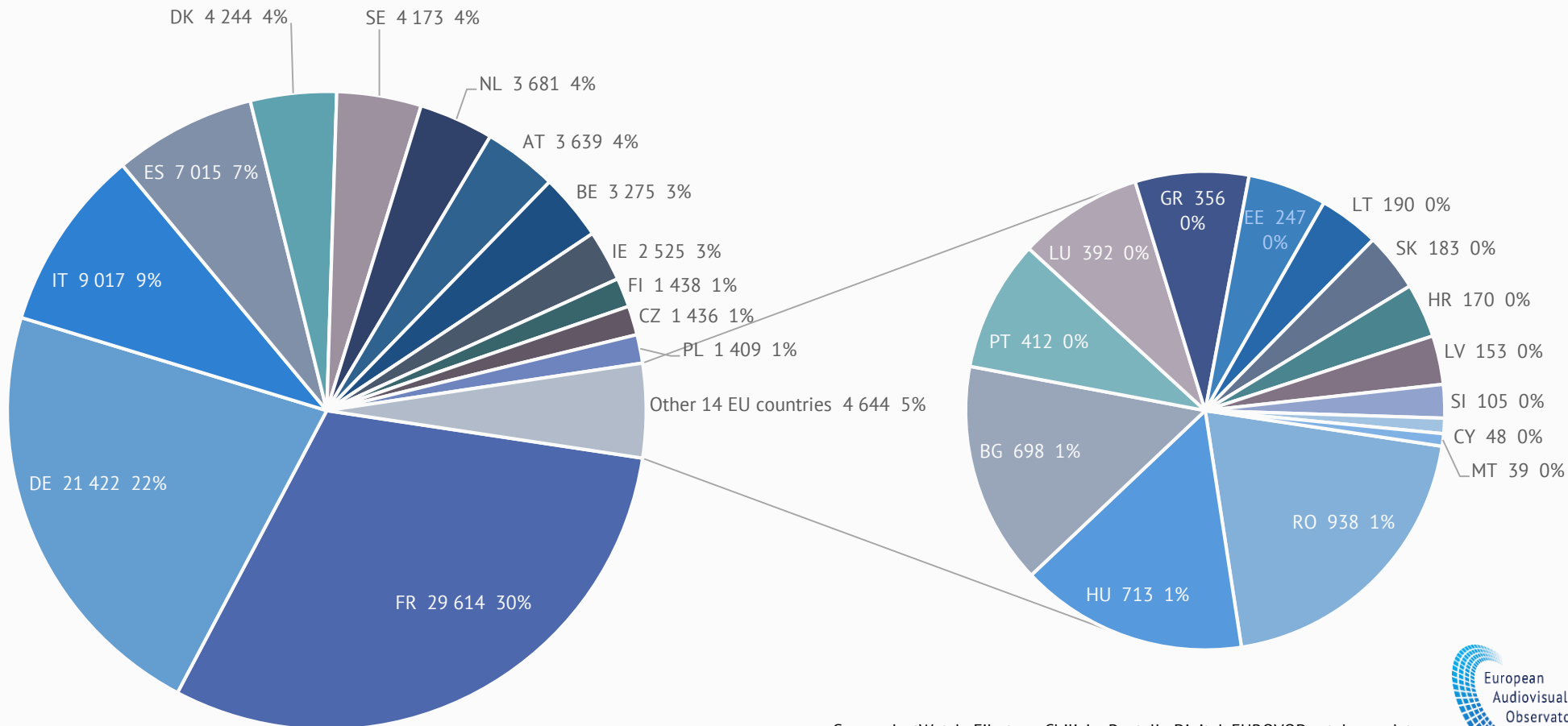
As a rule of thumb, the lower the volume of titles, the better the average country circulation.

For other European films, British films made up the bulk of films with 81% of all EUR OBS films on TVOD and 75% on SVOD

Which EU27 countries exported the most films on TVOD?

- French films dominated the export of EU27 films on TVOD services with 30% followed by the other 3 biggest film producing countries in EU27.
- Nordic countries, Dutch, Austrian, Belgian and Irish films completed the top 10 export countries for EU27 films while remaining 14 EU27 countries exported less than 5% of all EU27 films.

TVOD – Number of EU films exported outside of their national market by country of origin

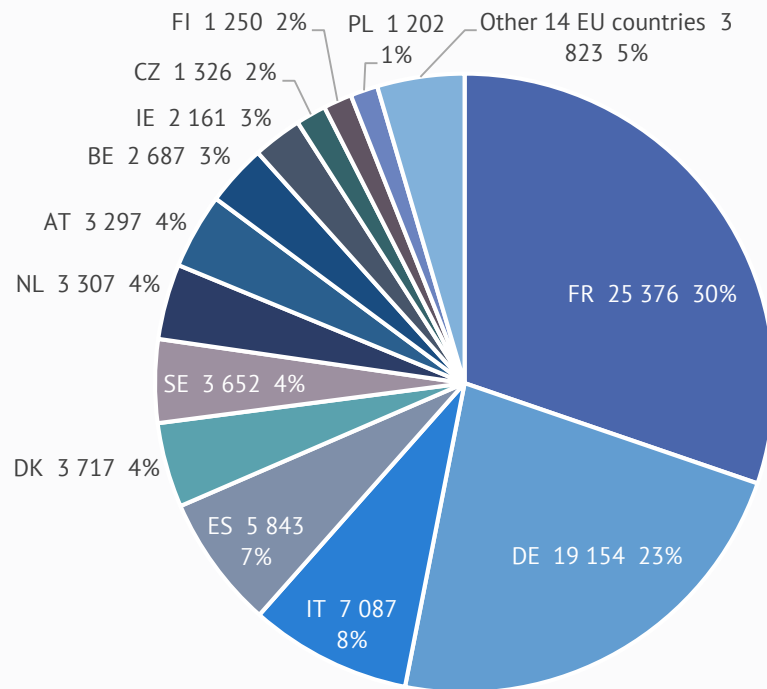


Source: JustWatch, Filmtoro, Chili, La Pantalla Digital, EUROVOD catalogue data

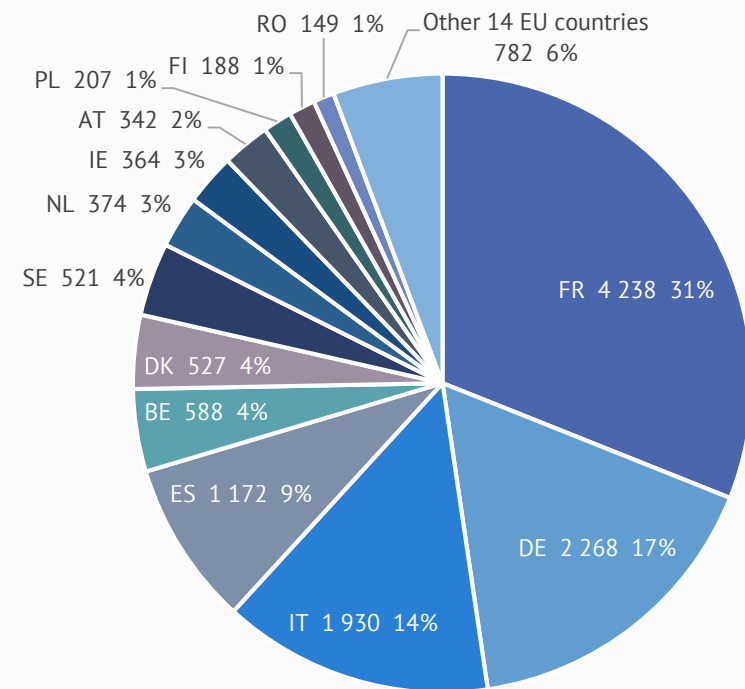
National and multi-country TVOD services had similar share of EU27 non-national films by country of origin

- ▶ For EU27 films, the percentages of exports were comparable for national and multi-country catalogues.
- ▶ French, German, Spanish and Italian films represented 68% of all EU27 films exports for multi-country services and 71% for national services.

Export of EU films in 114 multi-country TVOD catalogues



Export of EU films in 24 national TVOD catalogues

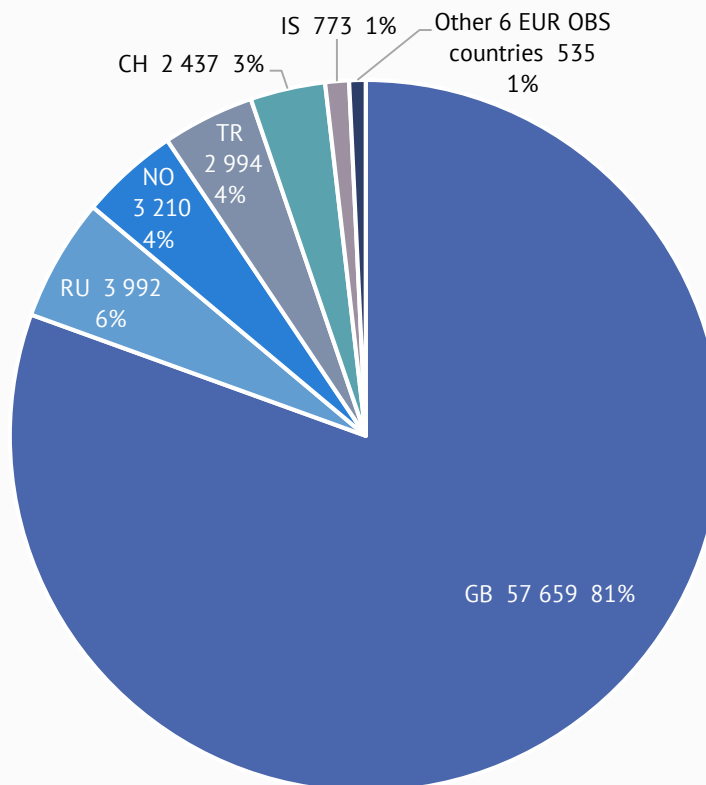


Source: JustWatch, Filmtoro, Chili, La Pantalla Digital, EUROVOD catalogue data

Which other European countries exported the most films on TVOD?

- ▶ **British films dominated the export of other European films** on TVOD services with 81% of all EUR OBS films available on TVOD services.
- ▶ Films from Russia, Norway, Turkey, Switzerland and Island accounted for 18%.
- ▶ The other 1% of films from other European countries were provided by Georgia, Bosnia and Herzegovina, Albania, Armenia, Macedonia and Liechtenstein.

TVOD – Number of EUR OBS by country of origin

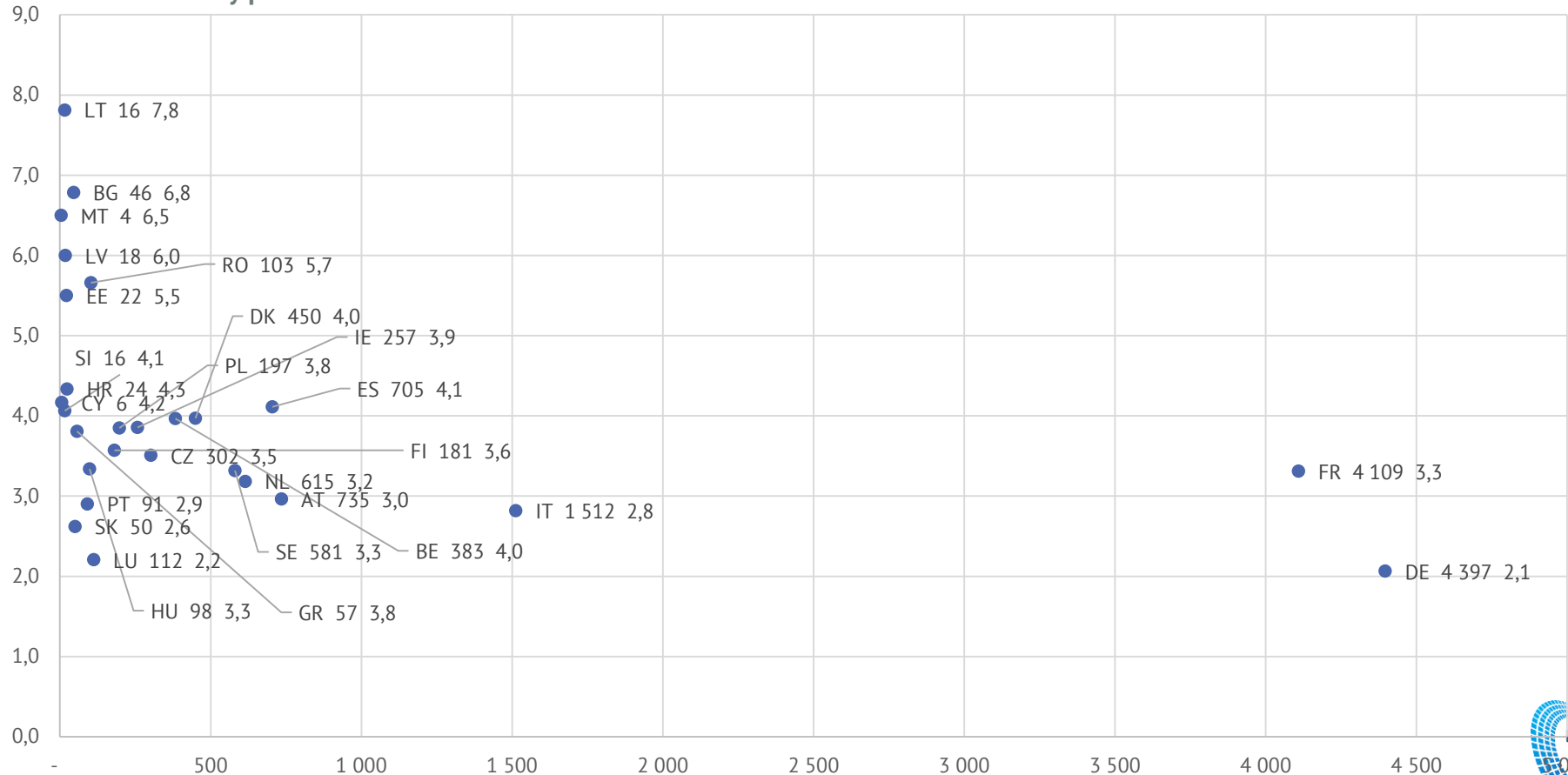


Source: JustWatch, Filmtoro, Chili, La Pantalla Digital, EUROVOD catalogue data

And how many unique film titles were exported and present on average in countries?

- Countries with a lower number of films exports had a better country circulation – a low number of titles enhanced circulation.
- Spanish titles were the best circulating titles from EU-4 when they were exported, followed by French, Italian and German titles.
- Titles from smaller film producing like Bulgaria, Lithuania or Romania also had a high country circulation for a smaller number of titles.

TVOD – Number of unique EU film titles exported outside of their country of origin and average non-national country presence



Read the matrix as: 4 109 French titles were exported with an average country presence in 3,3 countries.

Top 20 EU film titles exported on TVOD services

- ▶ 6 French, 5 Spanish and 3 Italian titles were among the most popular on TVOD services in 2020.
- ▶ The top list is completed by 2 German titles, 2 Irish and respectively 1 Bulgarian and 1 Danish title.
- ▶ 14 titles were co-productions of which 7 with the United States and 7 between at least 2 EU27 countries.
- ▶ The median production year was 2016 and 3 titles were less than 1 year old - 13 titles were produced in the past 5 years in 2020 and 7 titles were produced before 2015 (catalogue films).

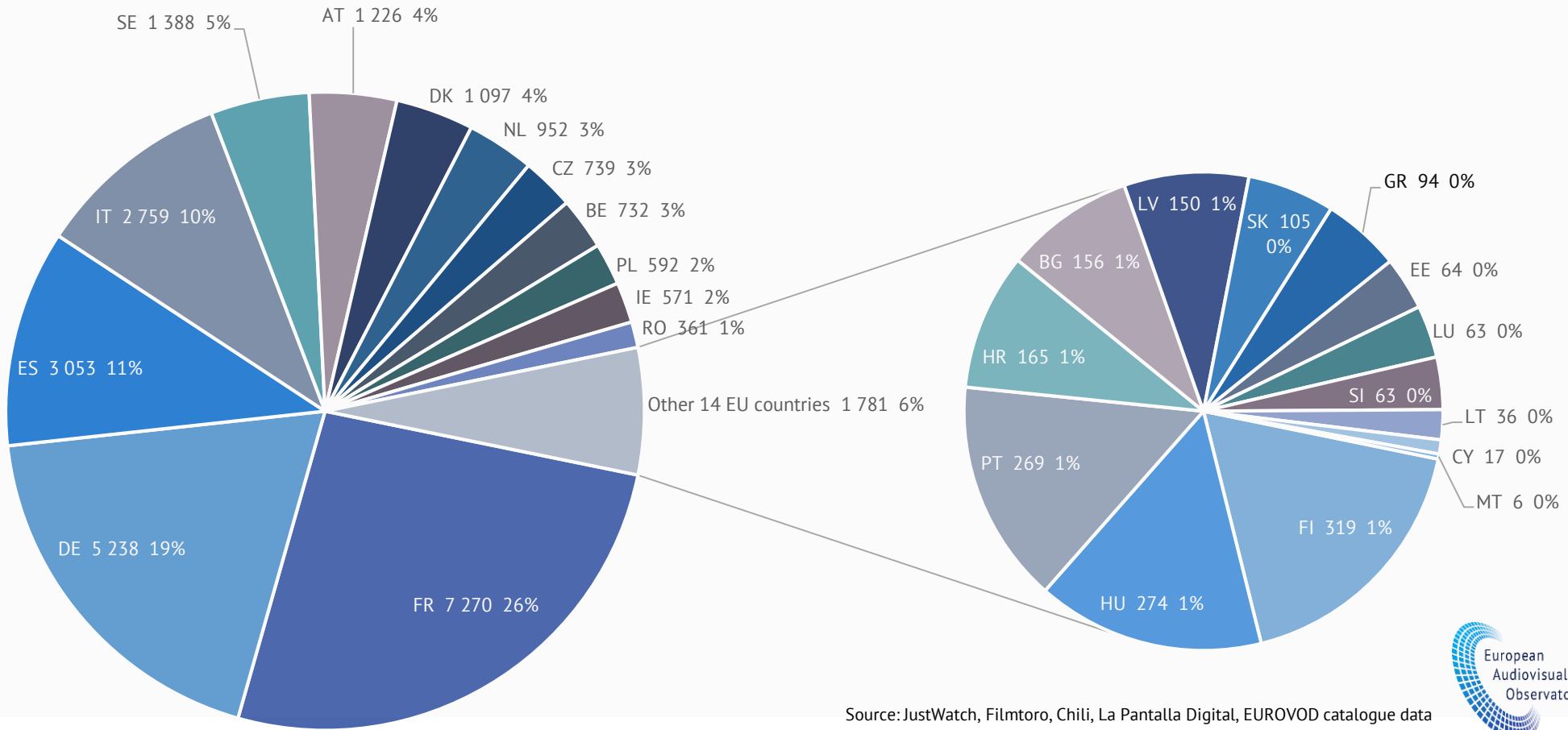
Top 20 EU27 exported film titles in 138 TVOD catalogues

Original title	Year of production	Production country	Export EU services	Export EU countries
The Grinch	2018	FR,JP,US	82	19
Wonder Park	2019	ES,US	80	19
Call Me by Your Name	2017	IT,FR,BR,US	76	19
Lucy	2014	FR	74	18
Cold Blood Legacy	2019	FR,UA,BE	74	19
Hitman	2007	FR,US	73	18
Tadeo Jones 2: El secreto del Rey Midas	2017	ES	73	19
C'era una volta il West	1969	IT,US	71	19
55 Steps	2017	DE,BE	70	19
In the Name of the Father	1993	IE,GB,US	69	19
Conor McGregor: Notorious	2017	IE	69	18
Transporter 2	2005	FR	67	19
Atrapa la bandera	2015	ES	67	19
Grave	2016	FR,BE	67	17
Sniper: Legacy	2014	BG	64	19
Dolor y gloria	2019	ES,FR	64	15
The Leisure Seeker	2017	IT,FR	64	19
Gernika	2016	ES,US	63	18
Love Steaks	2013	DE	63	27
Under sandet	2015	DK,DE	62	19

Which EU countries exported the most on SVOD?

- As it was the case for TVOD, France was also the top film exporter on SVOD with 26% of all EU27 film exports while EU-4 made up 66% of all exported EU27 films.
- The proportion of the bottom 14 export countries was also comparable, at 6% of all EU27 film exports.

SVOD – Number of EU films exported outside of their national market by country of origin

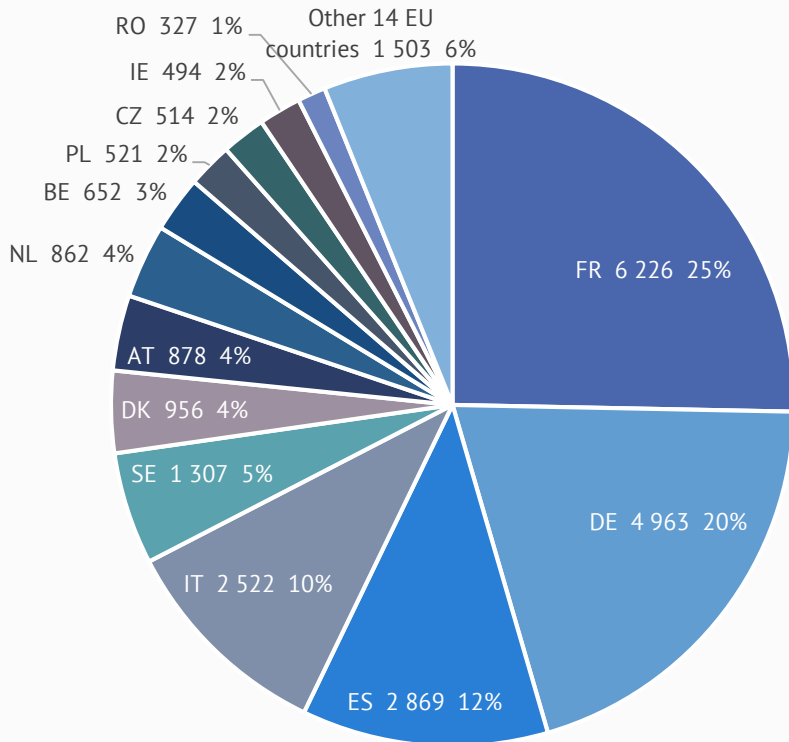


Source: JustWatch, Filmtoro, Chili, La Pantalla Digital, EUROVOD catalogue data

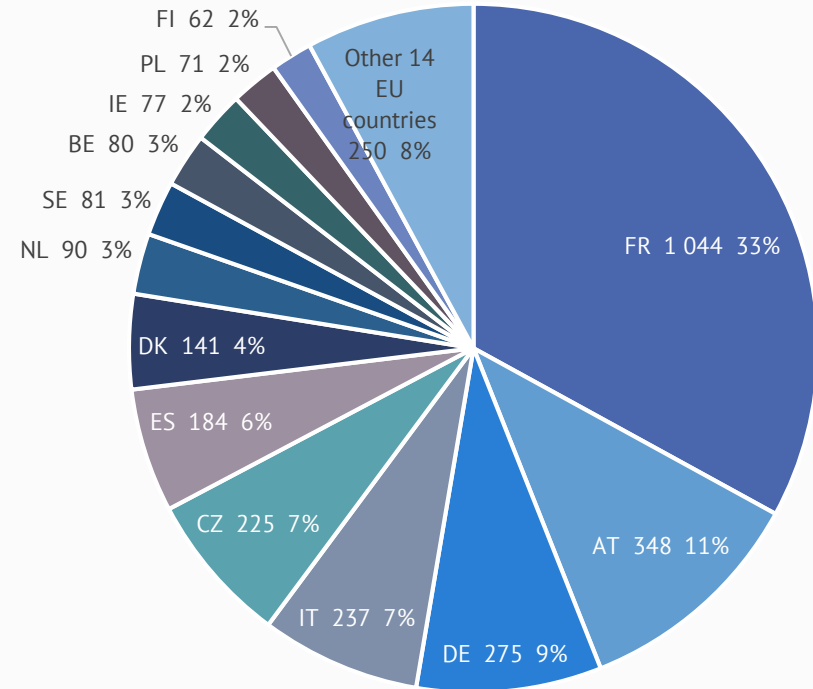
Comparable proportions of films on SVOD as on TVOD for multi-country and national services

- ▶ For multi-country catalogues French, German, Spanish and Italian films represented 67% of all exported EU27 films.
- ▶ For national catalogues, due to the high number of German SVOD catalogues, Austrian films were surprisingly ranked at the second spot of exports with 11%, preceded by French films with 33%.

Export of EU films in 160 multi-country SVOD catalogues



Export of EU films in 25 national SVOD catalogues

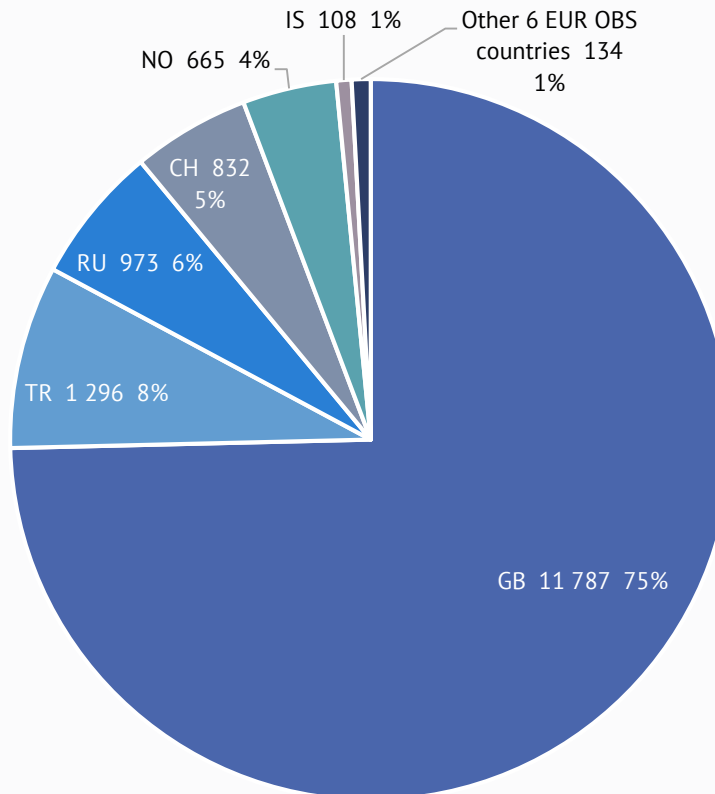


Source: JustWatch, Filmtoro, Chili, La Pantalla Digital, EUROVOD catalogue data

Which other European countries exported the most on SVOD?

- ▶ Comparable to TVOD, **British films made up the lion share of other European films** with 75% on SVOD.
- ▶ Other European countries made up a comparable share of films, with Turkey, Russia, Switzerland, Norway and Island making up 24% of other European films on SVOD.
- ▶ 6 other European countries represented 1% of all EUR OBS films on SVOD.

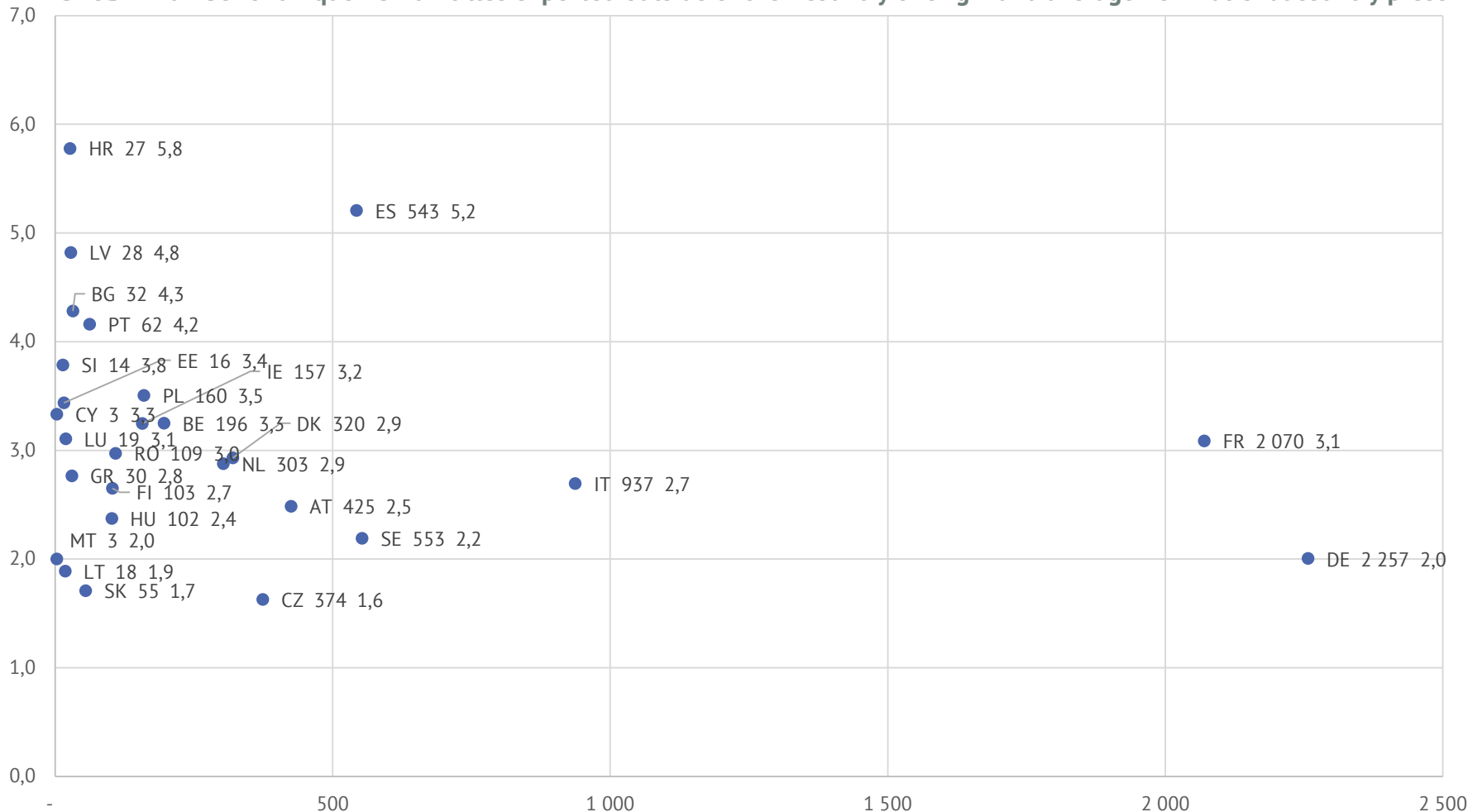
SVOD – Number of EUR OBS films by country of origin



And how many unique film titles are exported and present on average in countries?

- Of EU-4 countries, Spanish titles circulated the best, even with a lower number of titles, followed by French titles.
- Titles from smaller film producing like Croatia, Bulgaria, Latvia, Hungary also had a high country circulation for a smaller number of titles.
- Heavy exporters such as France and Germany had a lower circulation than many other countries but with much more titles exported.

SVOD – Number of unique EU film titles exported outside of their country of origin and average non-national country presence



Read the matrix as: 2 070 French titles were exported with an average country presence in 3,1 countries

Source:
JustWatch,
Filmtoro, La
Pantalla Digital,
EUROVOD
catalogue data



Top 20 EU27 film titles exported on SVOD services

- ▶ French titles represented 11 titles in the top 20 list, followed by 2 Belgian titles and 7 titles from other EU27 country (Germany, Slovenia, Italia, Spain, Poland, Bulgaria, Denmark).
- ▶ 14 titles were co-productions of which 7 with the United States and 7 between at least 2 EU27 countries.
- ▶ The median production year was 2014 and 4 titles were produced in or after 2018 - 8 titles were produced in the past 5 years and 12 titles were produced before 2015 (catalogue films).

Top 20 EU exported film titles in 185 SVOD catalogues

Original title	Year of production	Production count	Export EU services	Export EU countries
Lucy	2014	FR	31	18
Taken 3	2014	FR	28	15
Enemy at the Gates	2001	DE,US,GB,IE	26	16
Astérix: Le secret de la potion magique	2018	FR,BE	23	18
Barbarella	1968	FR,IT	23	15
Robin Hood: Men in Tights	1993	FR,US	22	16
Houston, We Have a Problem	2016	SI,HR,DE,CZ,QA	22	18
Iris	2016	FR,BE	22	16
Colombiana	2011	FR,US	22	14
Once Upon a Time in America	1984	IT,US	22	19
Anacleto: Agente secreto	2015	ES	22	18
Astérix : Le domaine des dieux	2014	FR,BE	21	11
The Queen's Corgi	2019	BE,US	21	15
Sammy's avonturen: De geheime doorgang	2010	BE,US	21	14
Zycie za zycie. Maksymilian Kolbe	1991	PL,DE	20	18
Intouchables	2011	FR	20	11
Day of the Dead: Bloodline	2018	BG,US	20	17
Ninjago: Masters of Spinjitzu - Day of the Departed	2016	DK,CN	20	19
Superstar	2012	FR	20	19
Jonas	2018	FR	20	19

TV content in VOD catalogues in the EU27
Overview of
47 TVOD catalogues
and
160 SVOD catalogues

C.1 – Size of TV content catalogues

TV content in this section was analysed in number of cumulated TV seasons. Some indicators are also shown in number of cumulated TV episodes.

TVOD catalogues were bigger than SVOD catalogues in average number of seasons, while SVOD catalogues were bigger in median number of seasons

- ▶ On average, TVOD catalogues were bigger in number of TV seasons than SVOD catalogues.
- ▶ The median SVOD catalogue was bigger than the median TVOD catalogue, because more SVOD services counted a bigger TV content volume, as it is their core business.

Multi-country TVOD services were the biggest in average number of seasons

- ▶ Multi-country TVOD services had almost twice the average size of multi-country SVOD services.
- ▶ Multi-country VOD catalogues showed a larger average number of seasons than national VOD services

Huge disparities in absolute numbers of TV seasons for TVOD and SVOD services

- ▶ Multi-country services (both TVOD and SVOD) had a much higher amount of TV seasons than national services, which seems to be a matter of scale.
- ▶ SVOD services showed to be more focused on TV content and TVOD services, on films.

The bulk of TV series first seasons available on SVOD were less than 5 years old

- ▶ 59% of all TV series first seasons available on SVOD were produced in 2016 or later and 82% were less than 10 years old in 2020.
- ▶ TV series first seasons on TVOD were older, with just 28% of all first seasons available on TVOD being produced in 2016 or later and 63% being less than 10 years old in 2020.

Strong differences between TVOD and SVOD services in the number of TV seasons

- ▶ On average, TVOD catalogues had 53% more TV seasons than SVOD catalogues.
- ▶ The median SVOD catalogue, though, was 66% bigger than the median TVOD catalogue, because TV content being their core business, more services counted a significant volume of seasons.
- ▶ While 7 TVOD services counted 3 000 or more seasons, only 2 SVOD services counted around 3 000.

Average and Median size of TV seasons catalogues by business model, in number of seasons



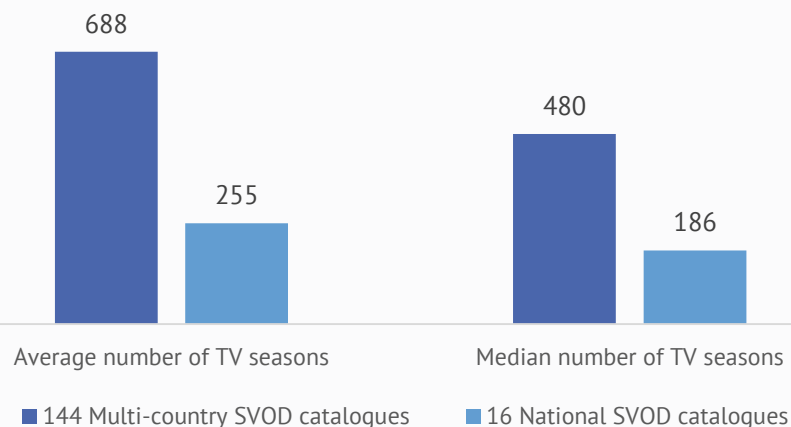
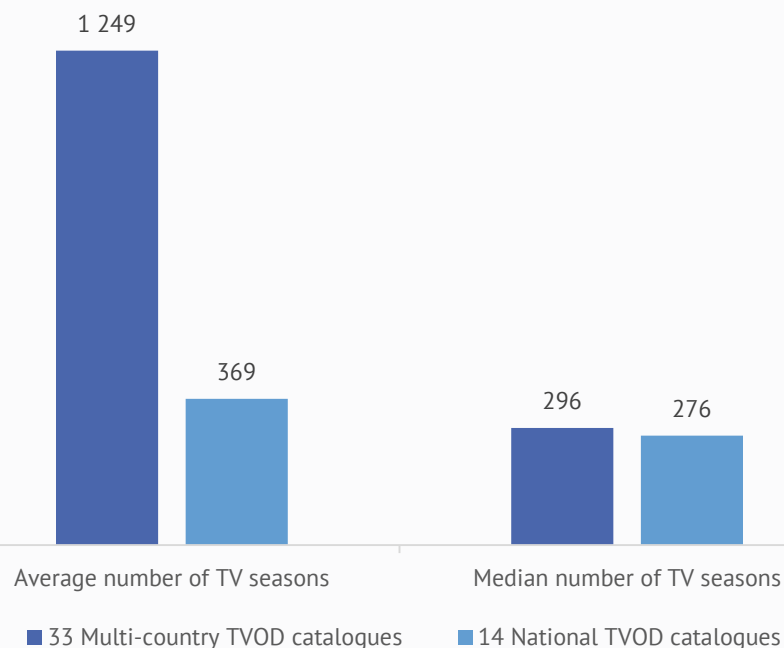
Source: JustWatch data

Also, strong differences between national and multi-country services

- ▶ Multi-country catalogues showed a larger average number of seasons than national services, with an average difference of 880 TV seasons for TVOD and 433 for SVOD services.
- ▶ Multi-country TVOD services had almost twice the average size of multi-country SVOD services.

Average and median size of TVOD catalogues, in number of seasons

Average and median size of SVOD catalogues, in number of seasons

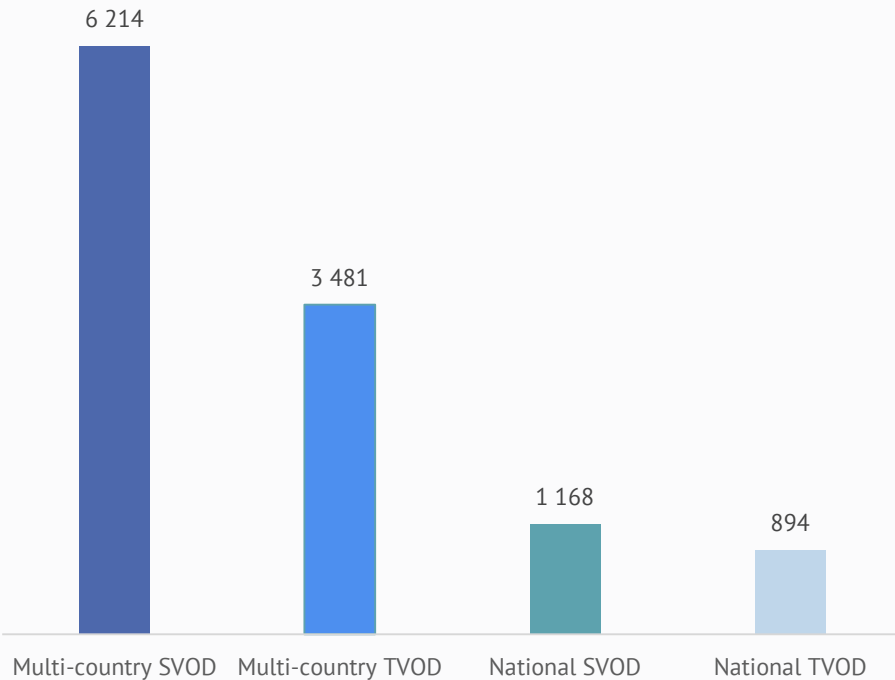


Source: JustWatch data

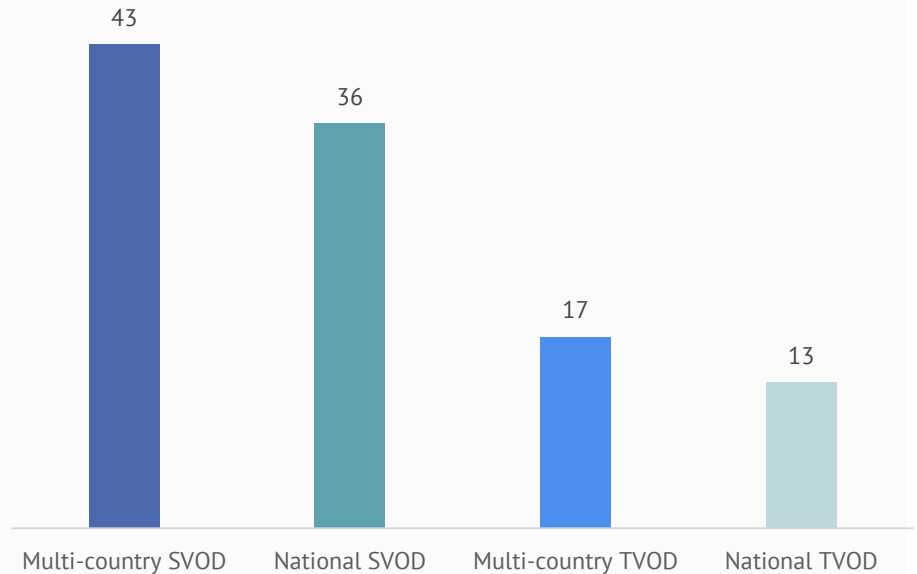
Huge disparities in absolute numbers of TV seasons for TVOD and SVOD services

- ▶ Multi-country services (both TVOD and SVOD) had a much higher amount of TV seasons than national services, which seemed to be a matter of **scale**.
- ▶ 77% of TVOD catalogues and 81% of SVOD catalogues offered less than 1 000 TV seasons.
- ▶ **SVOD services** seemed to be more **focused on TV content** and TVOD services, on films.

Maximum number of seasons in catalogue by business model



Minimum number of seasons in catalogue by business model

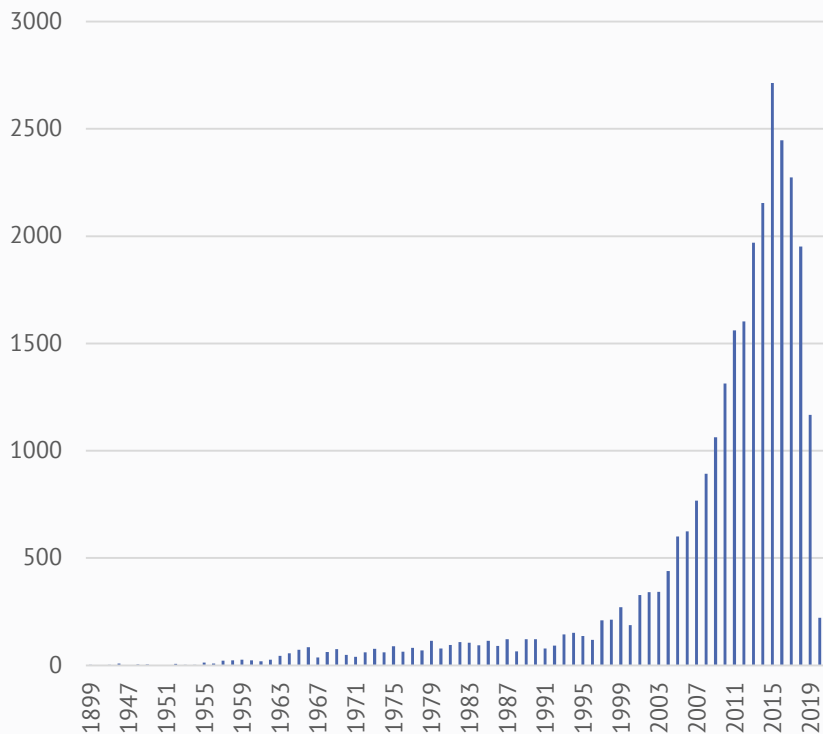


Source: JustWatch data

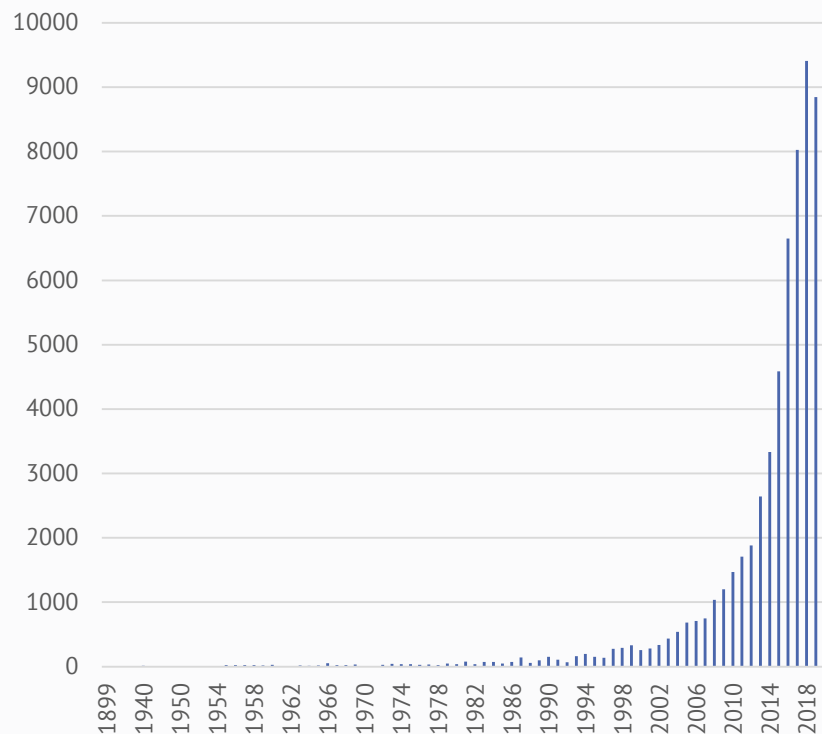
The bulk of TV series first seasons available on SVOD were less than 5 years old

- ▶ 59% of all TV series first seasons available on SVOD were produced in 2016 or later and 82% were less than 10 years old in 2020.
- ▶ TV series first seasons on TVOD were older, with just 28% of all first seasons available on TVOD being produced in 2016 or later and 63% being less than 10 years old in 2020.

TVOD - Number of TV series first seasons by production year



SVOD - Number of TV series first seasons by production year



Source: JustWatch data

C.2 – Unique TV contents available in VOD catalogues

TV content in this section was analysed in number of unique TV seasons.

Over 21 000 unique TV seasons were available in VOD catalogues, 23% from EU27

- ▶ 23% of all (21 124) unique seasons were of EU27 origin and 37% of US origin.
- ▶ EU4: German (39%), French, Spanish and Italian TV seasons represented 75% of all unique EU27 seasons.
- ▶ Other European seasons, with the integration of British content, represented 19% of all available.

A larger choice of unique seasons on SVOD, more EU27 content on TVOD

- ▶ With over 12 000 unique TV seasons available, SVOD services offered more unique TV seasons than TVOD.
- ▶ On TVOD services, EU27 content represented one third of TV seasons (32%).
- ▶ On SVOD services, seasons from outside the US or Europe represented 28%, more than European seasons.
- ▶ Other European seasons, with the integration of British content, reached 23% on SVOD and 14% on TVOD.

Differences in origin of EU27 content by business model: more equilibrated on SVOD, dominated by German content

- ▶ On TVOD, German seasons represented half of EU27 total, and German TV seasons also came first on SVOD.
- ▶ Germany, France and Spain alone provide the bulk (85%) of EU27 content on TVOD.
- ▶ DE, ES, NL, FR, IT and BE provided the majority of TV seasons on SVOD (76%) .

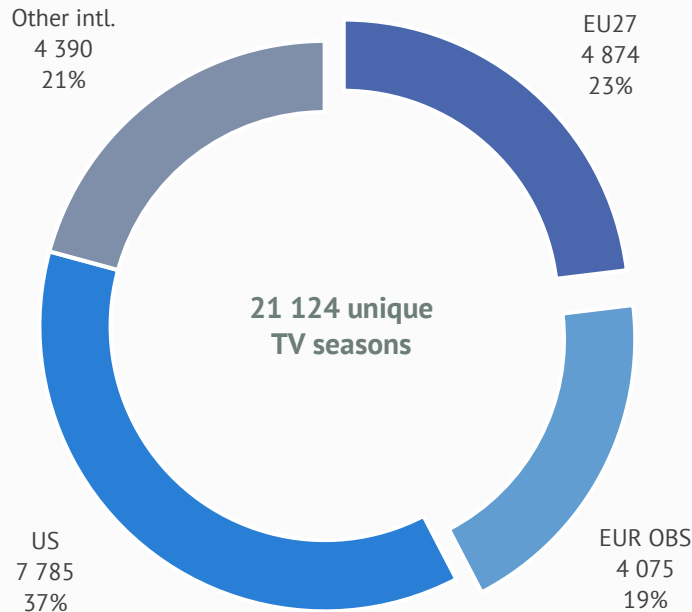
Dominance of British content in Other European TV seasons

- ▶ GB content represented for both types of services over 90% of all Other European TV seasons available.
- ▶ The shift of British TV content from EU28 to Other European, had a significant impact on the share of EU27 TV seasons for both types of services.

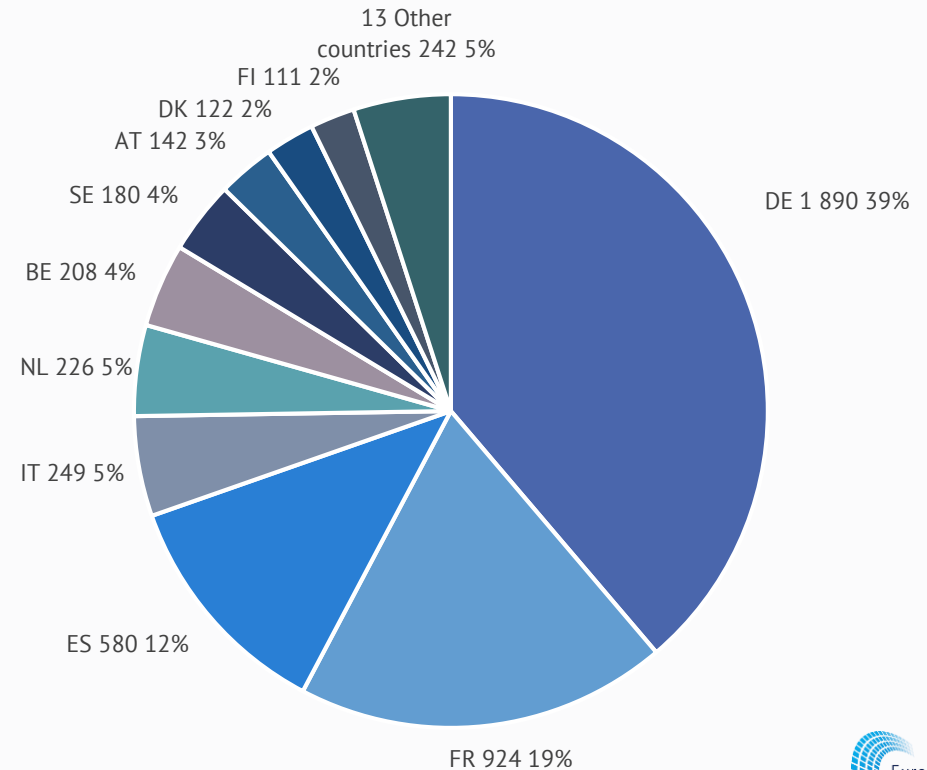
Over 21 000 unique TV seasons available in VOD catalogues, 23% from EU27

- ▶ 21 124 unique TV seasons were available to customers on both types of VOD services.
- ▶ 23% of all unique seasons were of EU27 origin and 37% of US origin.
- ▶ EU4: German (39%), French, Spanish and Italian seasons represented 75% of all unique EU27 seasons.
- ▶ Other European seasons, with the integration of British content, represented 19% of all available.

Origin of unique TV seasons in VOD catalogues by region of origin



Origin of unique EU27 seasons in VOD catalogues by country of origin

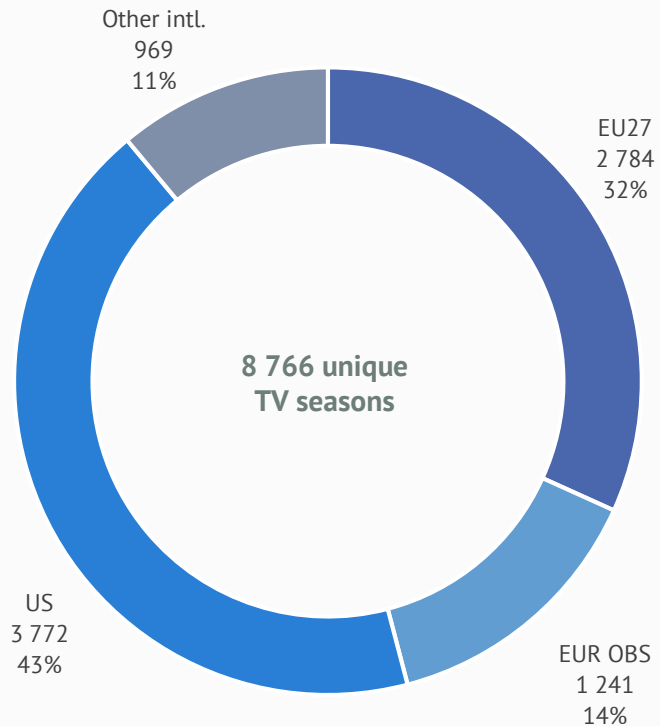


Source: JustWatch data

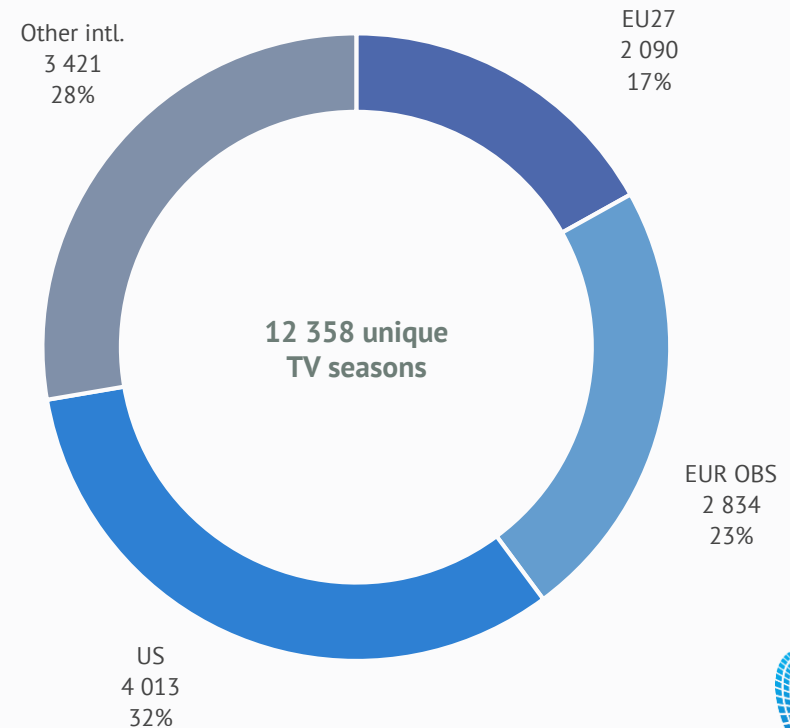
A larger choice of unique seasons on SVOD, more EU27 content on TVOD

- ▶ With over 12 000 seasons available, **SVOD services** offer the **highest number of unique TV seasons**.
- ▶ On TVOD services, **EU27 content** represented **one third of TV seasons (32%)**.
- ▶ On SVOD services, **Other international seasons** represented **28% of total**, above any European origin.
- ▶ **Non-EU27 European seasons**, with the integration of **British content**, made **23% on SVOD** and **14% on TVOD**.

Origin of unique TV seasons in TVOD catalogues



Origin of unique TV seasons in SVOD catalogues

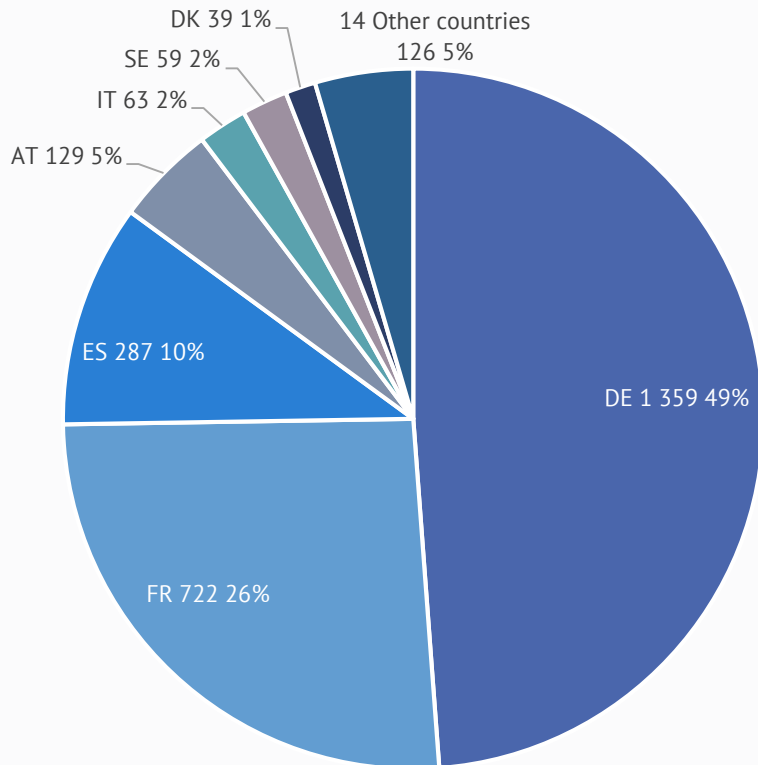


Source: JustWatch data

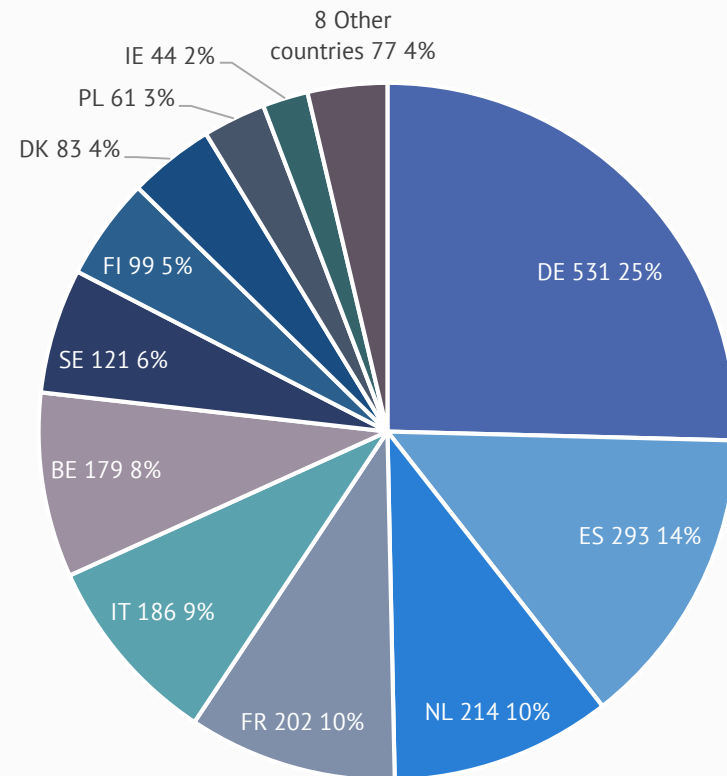
Origin of EU27 content by business model: more equilibrated on SVOD, German TVOD

- ▶ On TVOD, German seasons represented half of EU27 total, due to numerous seasons per TV title. (*)
- ▶ On SVOD, German TV seasons come first, while there are more Dutch than French or Italian seasons.
- ▶ Germany, France and Spain alone provide the bulk (85%) of EU27 content on TVOD.
- ▶ DE, ES, NL, FR, IT and BE provide the majority (76%) of TV seasons on SVOD.

Origin of unique EU27 TV seasons in TVOD catalogues



Origin of unique EU27 TV seasons in SVOD catalogues

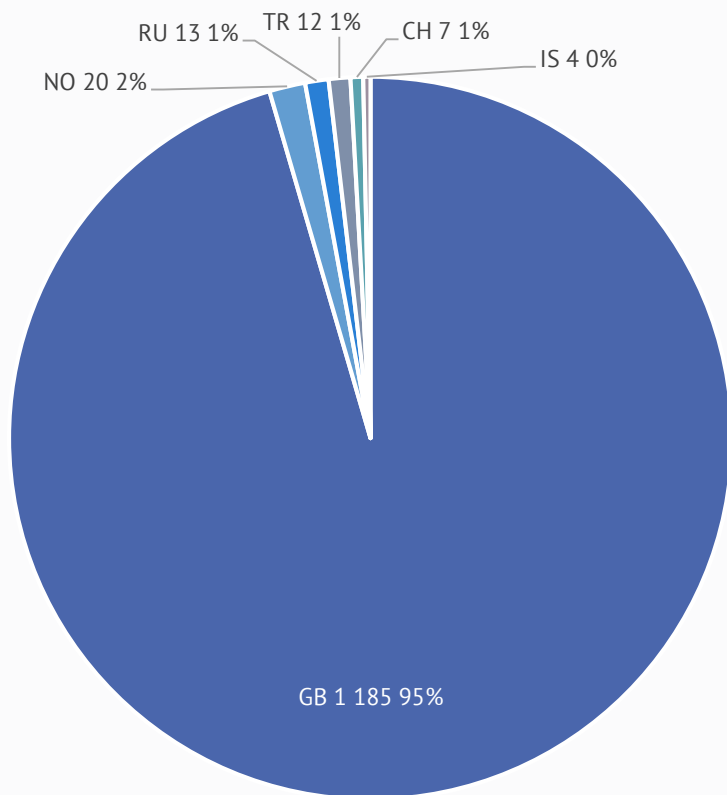


(*) Also partly due to the weight of German and Austrian services in the sample.

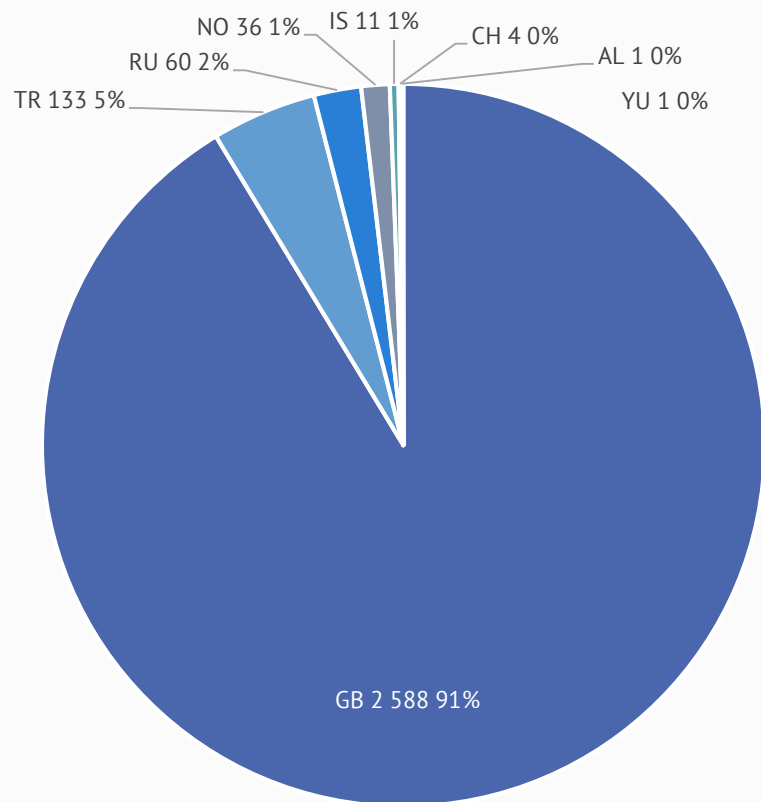
The dominance of British content in Other European TV seasons

- ▶ GB content represented over 90% of all Other European TV seasons available ON TVOD and on SVOD.
- ▶ Turkish, Russian, Norwegian and Swiss titles completed the Top 5 of Other European content.
- ▶ The shift of British TV content from EU-28 to EUR OBS had a significant impact on the share of EU27 TV seasons for both types of services.

Origin of unique EUR OBS TV seasons in TVOD catalogues



Origin of unique EUR OBS TV seasons in SVOD catalogues



Source: JustWatch data

C.3 – Origin and circulation of cumulated TV content

TV content was analysed here in **cumulated number of seasons**, with some indicators in **cumulated number of episodes**.

ORIGIN

24% of cumulated TV seasons on TVOD are of EU27 origin, but only 10,5% on SVOD

- ▶ On SVOD services, EU27 content decreased from 17% unique seasons to 10% cumulated seasons.
- ▶ US TV seasons, over half of all cumulated content in VOD, multiplied by 13 times in SVOD and by 7 times on TVOD their unique presence.
- ▶ There was more TV content from outside the US or Europe (26%) than European (23%) in SVOD catalogues.

US TV content counted more seasons, while Other international counted more episodes

- ▶ Episodes from outside the US or Europe represent almost one third of all TV episodes in SVOD catalogues (29%), and were mostly composed of Japanese, Canadian and Korean animation and drama.

The difference between the share of EU27 and of all European TV seasons was significant on SVOD

- ▶ If other European countries (incl. UK) are considered, the **European share is 37% for TVOD and 23% for SVOD**.

National VOD services presented the highest shares of EU27 TV seasons

- ▶ National TVOD services complemented their offering with other European content, while national SVOD catalogues relied more on other international content.

Multi-country VOD services relied more heavily on US seasons, but offered more European content in volume

- ▶ EU27 TV seasons represented 22% on multi-country TVOD services but just 10% on SVOD services.

C.3 – Origin and circulation of cumulated TV content

TV content was analysed here in **cumulated number of seasons**, with some indicators in **cumulated number of episodes**

CIRCULATION

EU27 TV seasons circulated in a smaller **number of countries** than other origins

- ▶ 32% of EU27 unique TV seasons represented only 24% of all cumulated content on TVOD, while on SVOD, 17% of EU27 unique TV content represented just 10% of cumulated. This is explained by the **lower circulation of EU27 content than other origins, with an average of 2,4 countries on TVOD and 3 on SVOD.**
- ▶ US and other regions TV seasons travelled best, crossing borders more easily than European content.

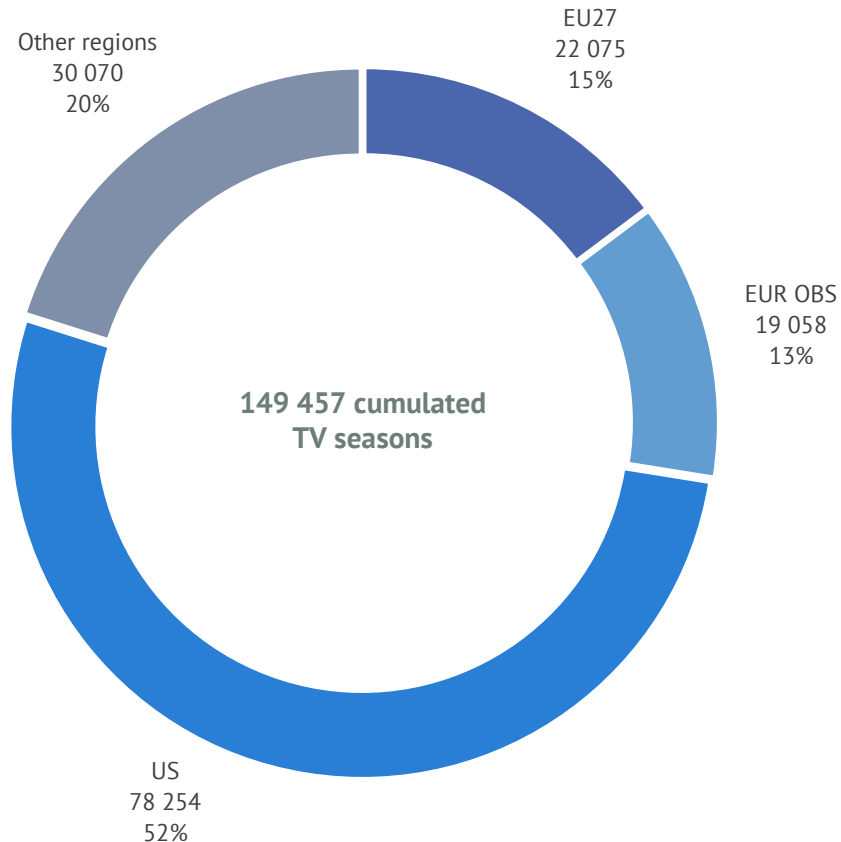
And **on catalogues**, EU27 TV content tended to circulate less than seasons from other regions

- ▶ **On average, EU27 TV seasons were present in 5 different TVOD catalogues and in 3 SVOD catalogues.**
- ▶ On TVOD, other European seasons (including GB) were found on an average 7,8 catalogues.
- ▶ While on SVOD, other international TV seasons circulated on an average 6,5 catalogues.
- ▶ US TV content circulated the best also in average number of catalogues, more importantly on TVOD (with 13,1 services).

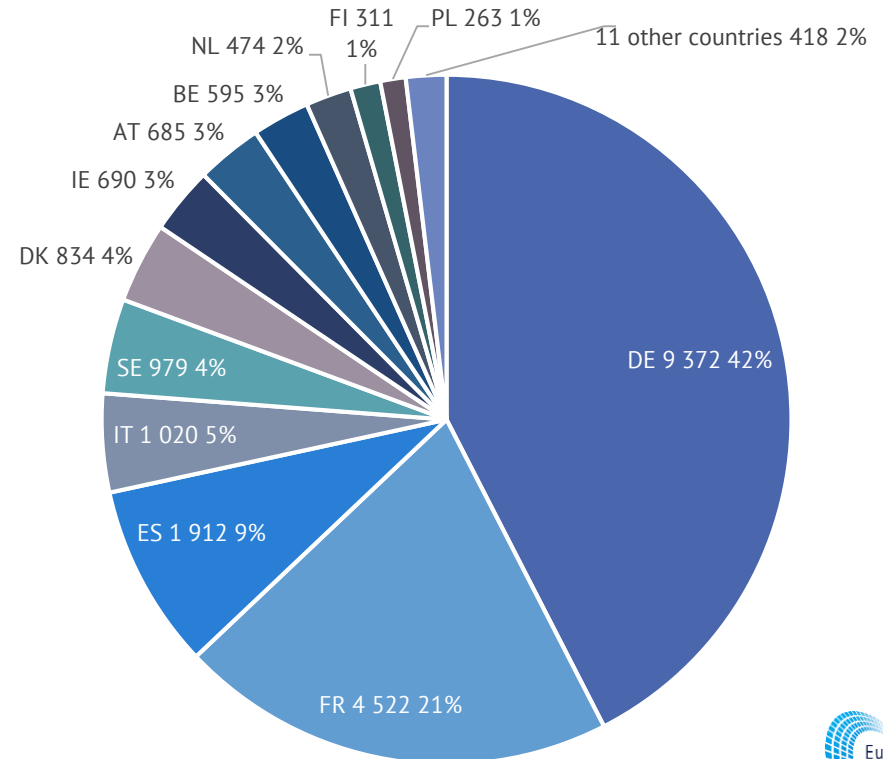
Around 150 000 cumulated TV seasons available in VOD catalogues, 15% from EU27

- ▶ 149 457 cumulated TV seasons were available to EU customers on 207 catalogues (TVOD and SVOD).
- ▶ 15% of all unique seasons were of EU27 origin compared to more than half of US origin (52%).
- ▶ Other European seasons, with the integration of British content, represented 13% of total available.
- ▶ EU4: German (39%), French, Spanish and Italian seasons represented 77% of cumulated EU27 seasons.

Origin of cumulated TV seasons in 207 VOD catalogues



Origin of cumulated EU27 seasons in 207 VOD catalogues, by country of origin



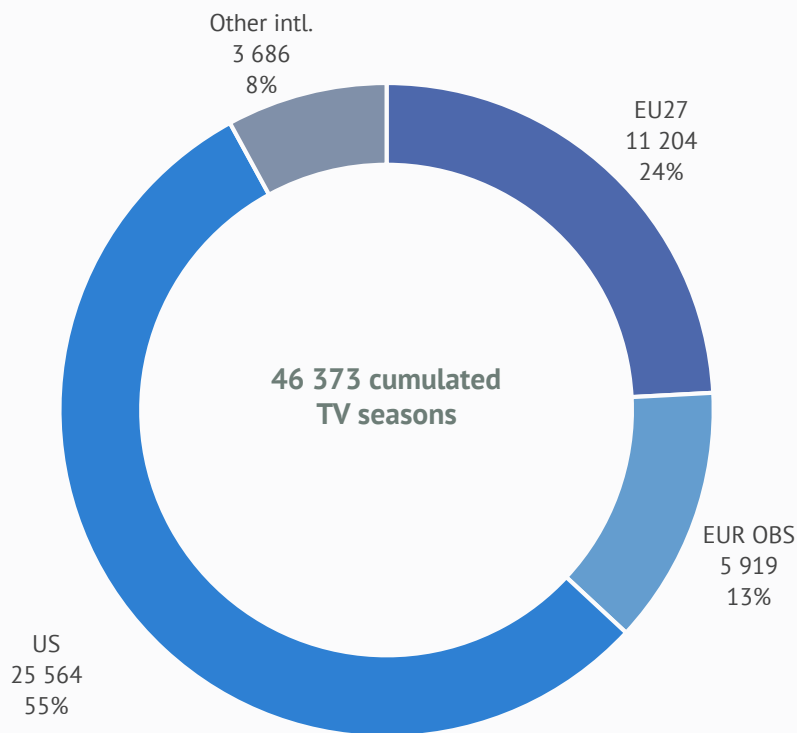
3 008 TV seasons have not been identified with a country of origin (2% of all seasons). They have been excluded for the analysis.

Source: JustWatch data

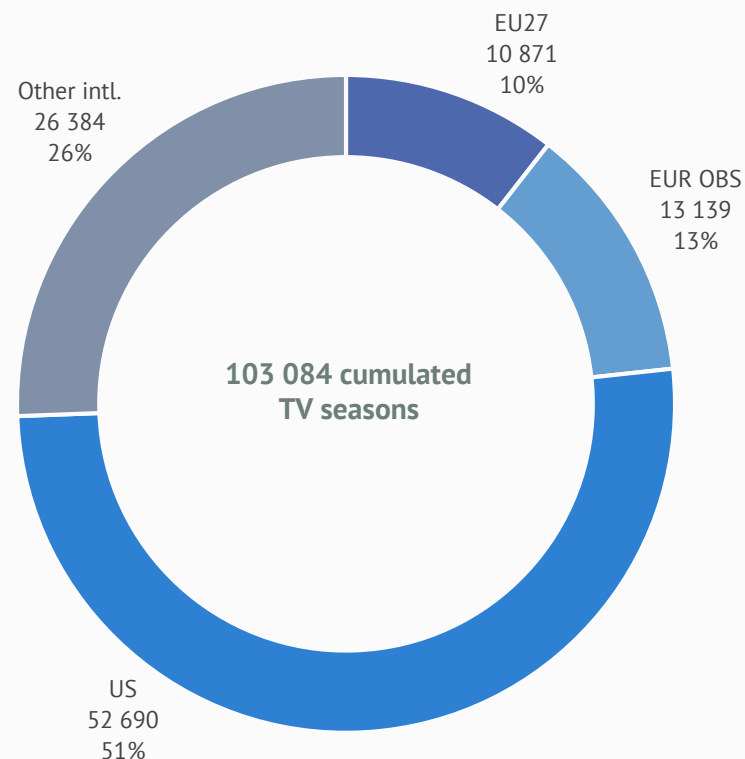
24% of cumulated TV seasons on TVOD were of EU27 origin, but only 10% on SVOD

- ▶ On SVOD services, EU27 content decreased from 17% unique seasons to 10,5% cumulated seasons.
- ▶ US TV seasons represented over half of all cumulated content in TVOD (55%) and in SVOD (51%), multiplying their unique presence by 13 times in SVOD and by 7 times on TVOD.
- ▶ More TV seasons from outside the US or Europe (26%) than European(*) in SVOD catalogues, showing the strong reliance of SVOD on productions from Japan (42%) and Canada (27%).

Origin of TV seasons in 47 TVOD catalogues



Origin of TV seasons in 160 SVOD catalogues



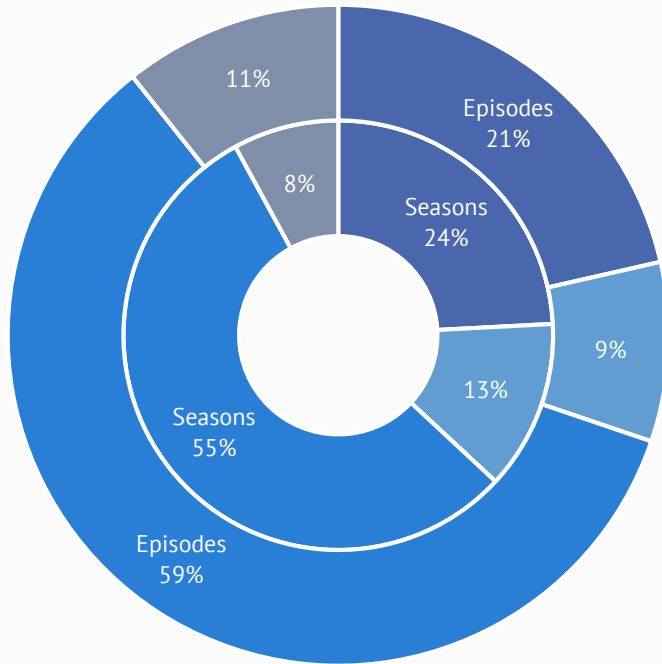
Source: JustWatch data

(*) EU27 and Other European origins together.

US TV content counted more seasons, while Other international, more episodes

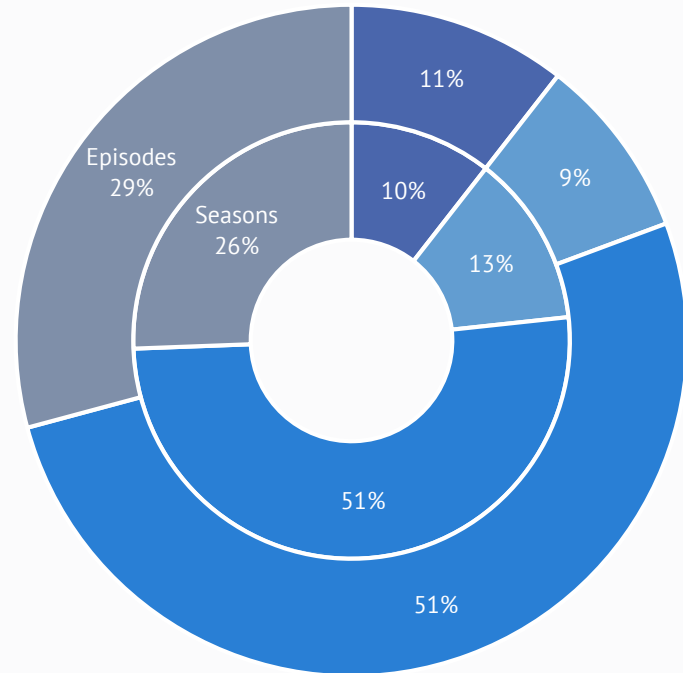
- ▶ European TV seasons showed less episodes in proportion than other origins seasons: European series counted fewer episodes than US or Other international series.
- ▶ Other international episodes represented almost one third of all TV episodes in SVOD catalogues (29%), and was mostly composed of Japanese, Canadian and Korean animation and drama.

Origin of TV titles, seasons and episodes on TVOD



■ EU27 ■ EUR OBS ■ US ■ Other intl.

Origin of TV titles, seasons and episodes on SVOD



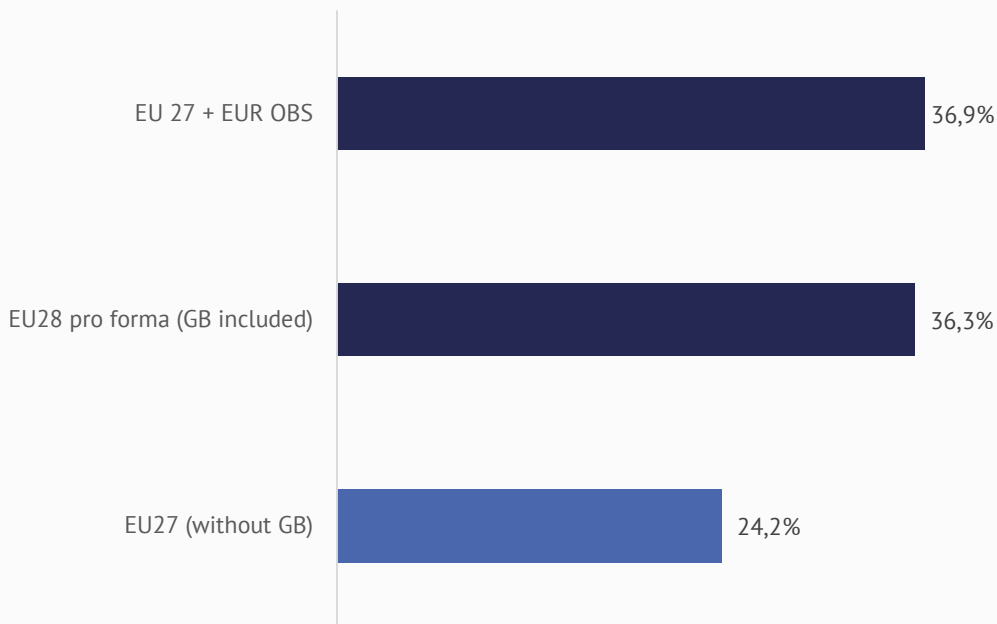
■ EU27 ■ EUR OBS ■ US ■ Other intl.

Source: JustWatch data

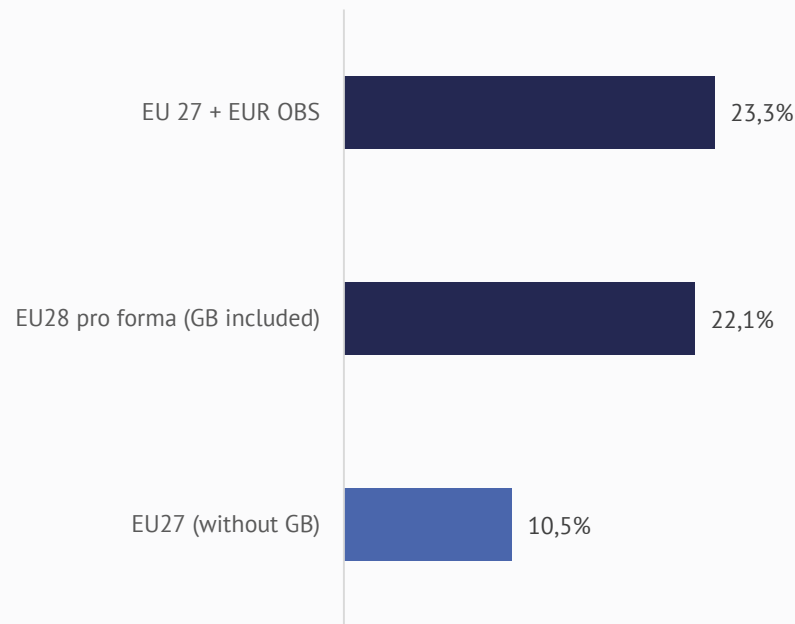
The difference between the share of EU27 and of all European seasons was significant on SVOD

- ▶ Share of European TV seasons varies strongly depending on which countries qualify as “European”.
- ▶ If only EU27 countries are counted the share of European seasons was 10,5% on SVOD, 24% on TVOD.
- ▶ If other European countries are taken into account, the share was 37% for TVOD and 23% for SVOD.
- ▶ Depending on whether British TV seasons were counted as European content or not, it increased the share of European seasons by 13% for both TVOD and SVOD.

Origin of TV seasons in 47 TVOD catalogues



Origin of TV seasons in 160 SVOD catalogues

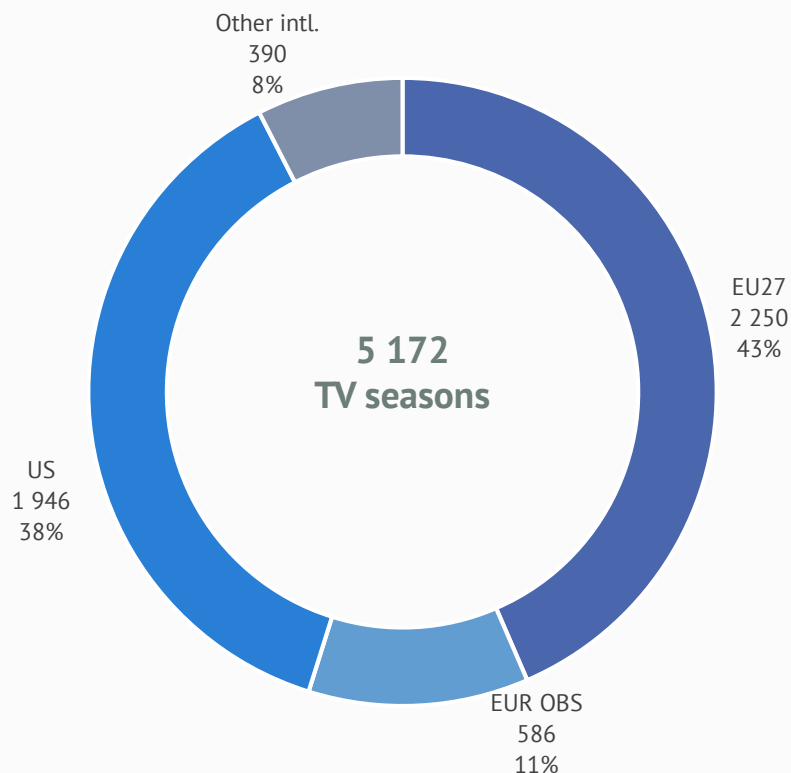


Source: JustWatch data

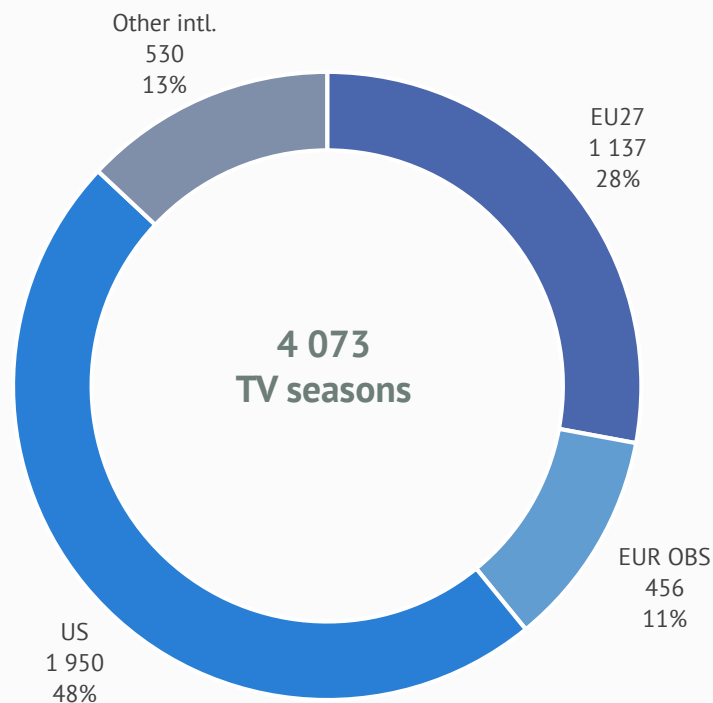
National VOD services presented the highest shares of EU27 TV seasons

- ▶ National TVOD services relied more on EU27 TV seasons (43%) than SVOD services (28%) but both types took care of their national audiences. More than half content on TVOD was European.
- ▶ Stronger reliance on US TV seasons of SVOD national services (48%) than that of TVOD services.
- ▶ National TVOD services complemented their offering with other European content, while national SVOD catalogues relied more on other international content.

Origin of TV seasons in 14 national TVOD catalogues



Origin of TV seasons in 16 national SVOD catalogues

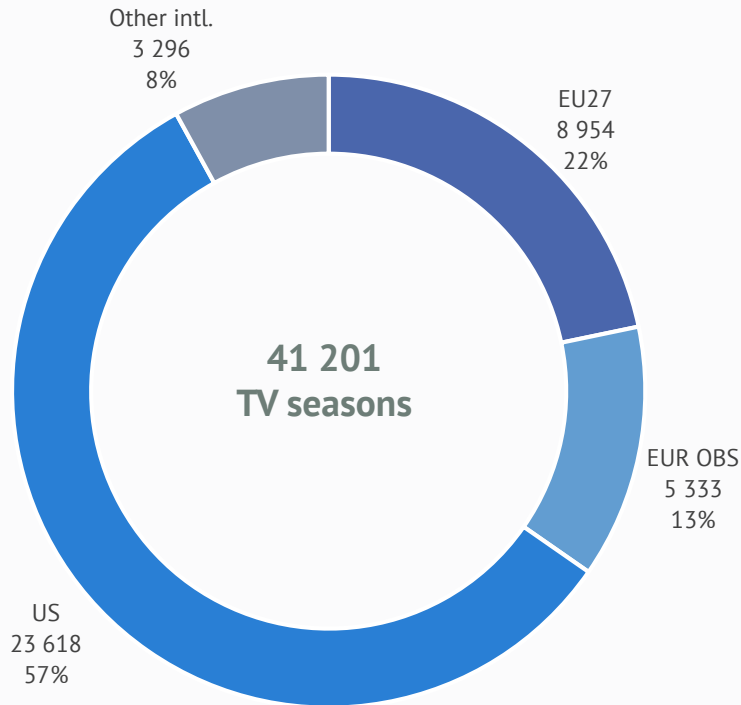


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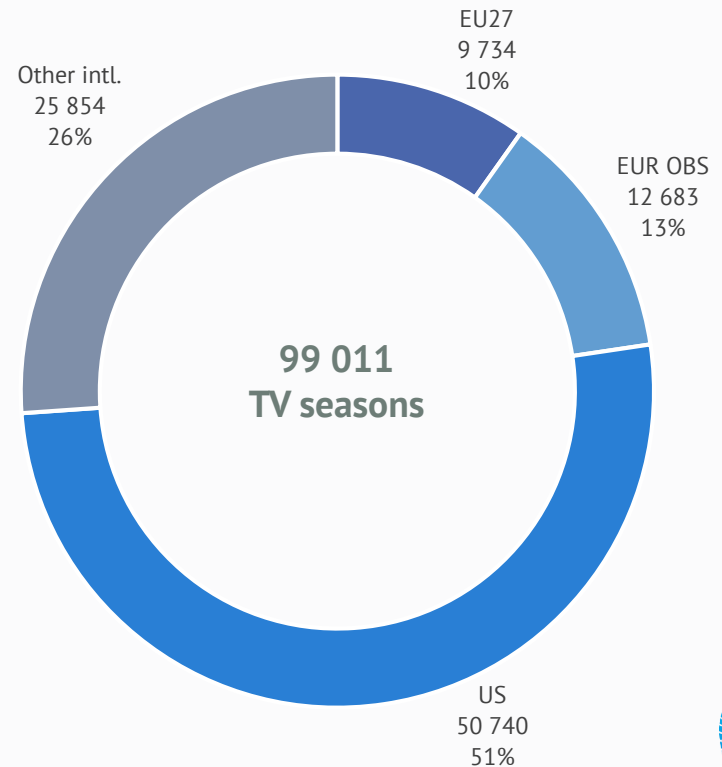
While multi-country VOD services relied more heavily on US TV seasons

- ▶ EU27 TV seasons represented 22% on multi-country TVOD services but just 10% on SVOD services.
- ▶ Multi-country TVOD services relied more heavily on US TV seasons (57%), but SVOD offered more volume.
- ▶ SVOD catalogues had conversely the highest share of other international TV seasons (26%), even bigger than all European (EU27 and other European) TV seasons together.

Origin of TV seasons in 33 multi-country TVOD catalogues



Origin of TV seasons in 144 multi-country SVOD catalogues



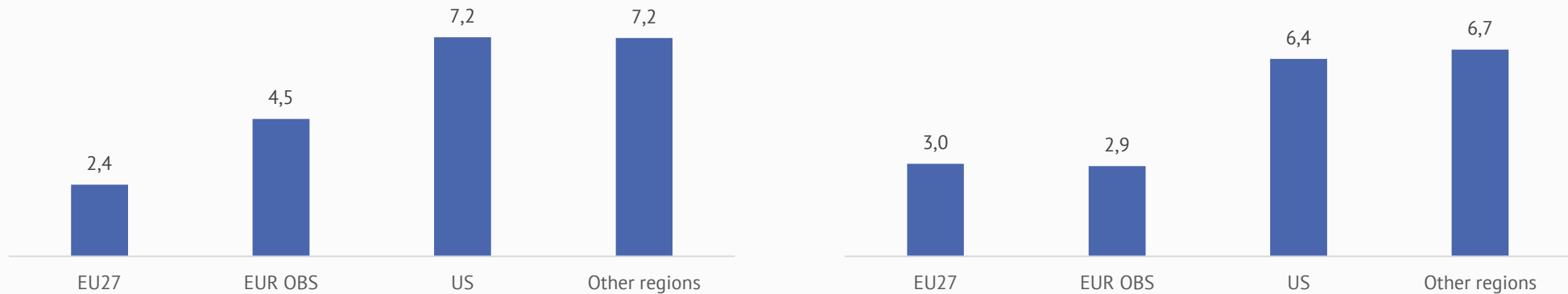
Source: JustWatch data

EU27 TV seasons circulated in a smaller number of countries than other origins

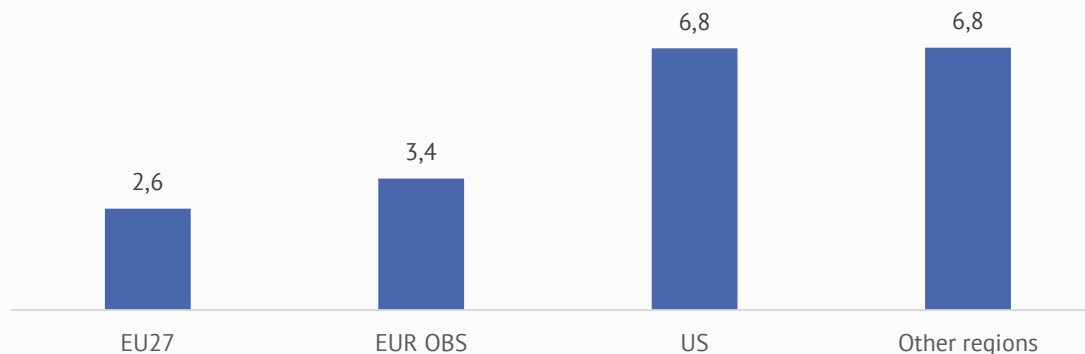
- ▶ 32% of EU27 unique TV seasons on TVOD represented only 24% of all cumulated content, and 17% of EU27 unique TV content on SVOD represented just 10% of cumulated. This is explained by the lower circulation in countries of EU27 content, with an average of 2,4 countries on TVOD and 3 on SVOD.
- ▶ US and other regions TV seasons travelled best, crossing borders more easily than European content.

TVOD – Average circulation of seasons in countries by region of origin

SVOD – Average circulation of seasons in countries by region of origin



All VOD services – Average circulation of TV seasons in countries by region of origin



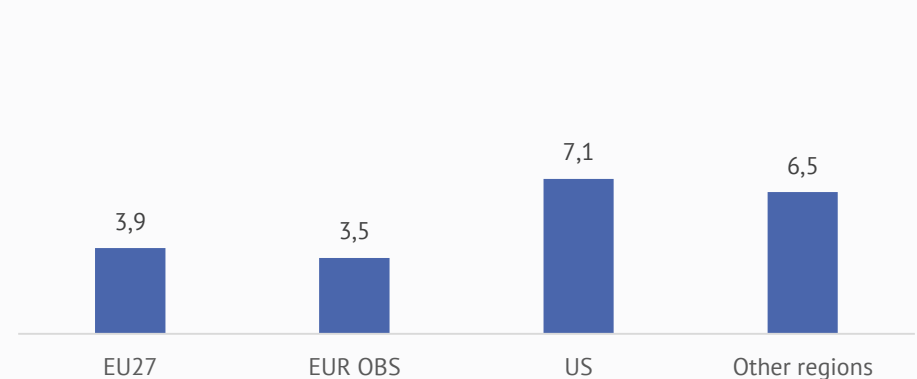
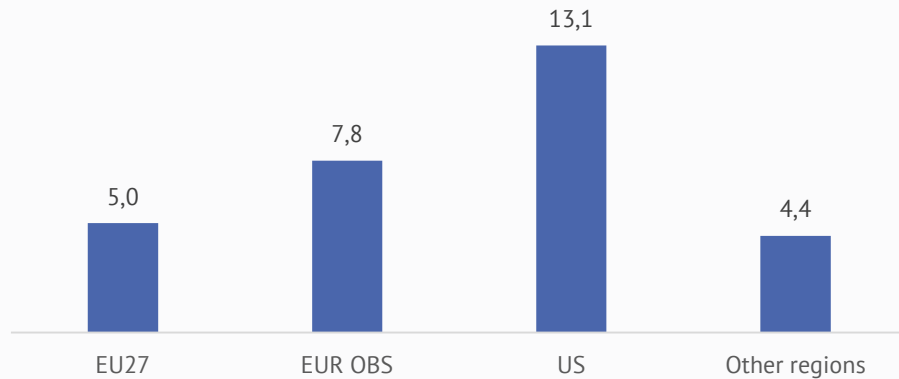
Source: JustWatch data

And on services, EU27 content circulated less than TV seasons from other regions

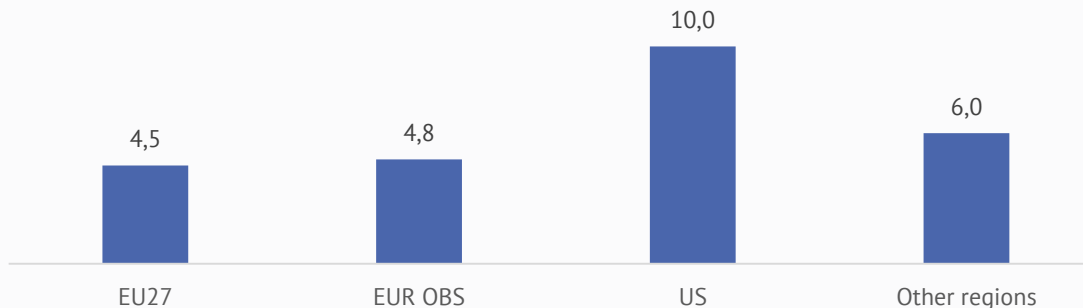
- ▶ On average, EU27 TV seasons were present in 5 different TVOD catalogues and in 3 SVOD catalogues.
- ▶ On TVOD, other European seasons (including GB) were found on an average 7,8 catalogues.
- ▶ While on SVOD, other international TV seasons circulated on an average 6,5 catalogues.
- ▶ US TV content circulated the best also in average number of services, more importantly on TVOD (13,1).

TVOD – Average circulation of seasons on services by region of origin

SVOD – Average circulation of seasons on services by region of origin



All VOD services – Average circulation of seasons on services by region of origin



Source: JustWatch data

C.4 – Focus on services' core business and ownership

Services owned by tech on TVOD, and by pure VOD players, Tech or Telecom on SVOD have the highest number of TV seasons in their catalogues

- ▶ 69% of all TV content on TVOD was on tech services (Amazon, Google, iTunes, Microsoft)
- ▶ 50% of content on SVOD was found on pure VOD players (Netflix, Crunchyroll, Hayu).

Sharp differences in the composition of catalogues by core business of service owners

- ▶ Services owned by distributors, telecom (Orange, Sky) and TV players (Maxdome, Canal VOD) showed the highest share of EU27 TV seasons on TVOD,
- ▶ Services owned by TV (Viaplay, Disney+) and distributors showed the largest EU27 TV content on SVOD.
- ▶ For SVOD, Pure VOD players (Netflix) built their catalogues on US and Other international TV seasons.
- ▶ The highest share of US seasons was found in SVOD services operated by telecom (Sky) and tech (Amazon) players, and in TVOD on Pure VOD (Chili) and tech players, all of them rounding 69% of US content.

Higher share of EU27 TV content for EU27 owned services...

- ▶ The share of EU27 TV seasons in the catalogues of EU owned services was higher, with 35% on TVOD and 29% on SVOD while global services had a EU27 seasons share of 19% on TVOD and 8% on SVOD.
- ▶ SVOD global services showed a higher share of Other international content (27%) than European content.

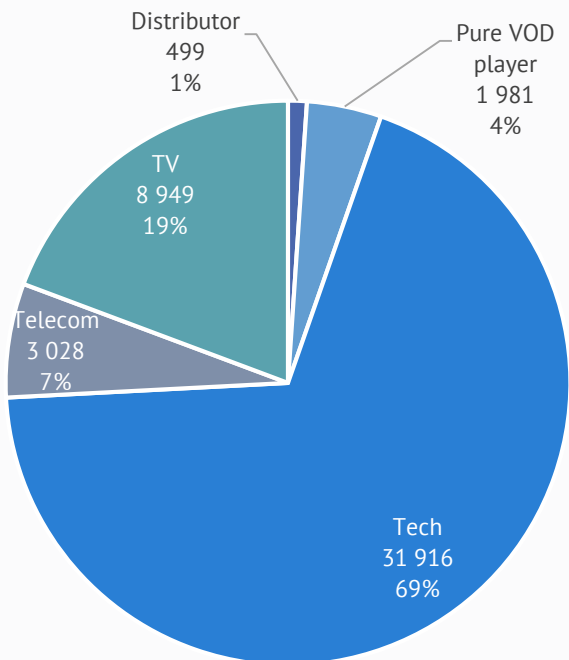
...But the total offer of EU27 seasons was higher for global services, mainly on SVOD

- ▶ In absolute numbers, global services offered more TV seasons and thus also more EU27 seasons than EU27 owned services (9,7 times more on SVOD; 3,5 times more on TVOD).
- ▶ SVOD global services offered 10 times more seasons from outside Europe and the US than global TVOD services.

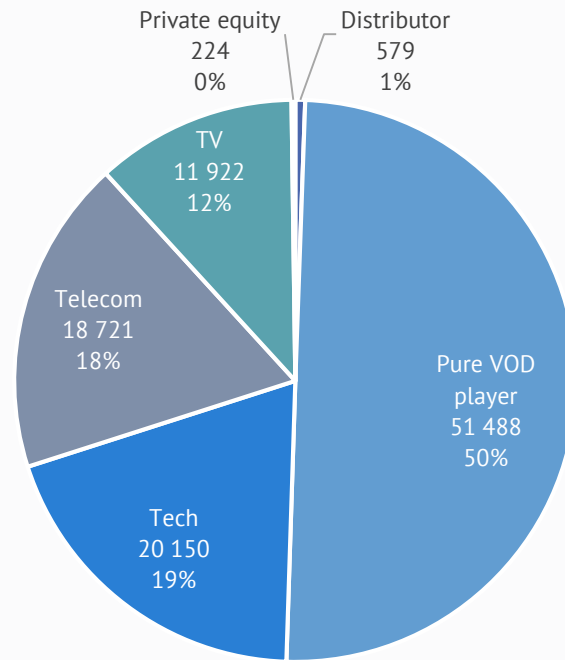
The biggest number of seasons was found on Tech players and Pure VOD players

▶ 69% of all TV content on TVOD were on tech services and 50% of content on SVOD on pure VOD players.

TVOD – Number of TV seasons by core business of service owner



SVOD – Number of TV seasons by core business of service owner



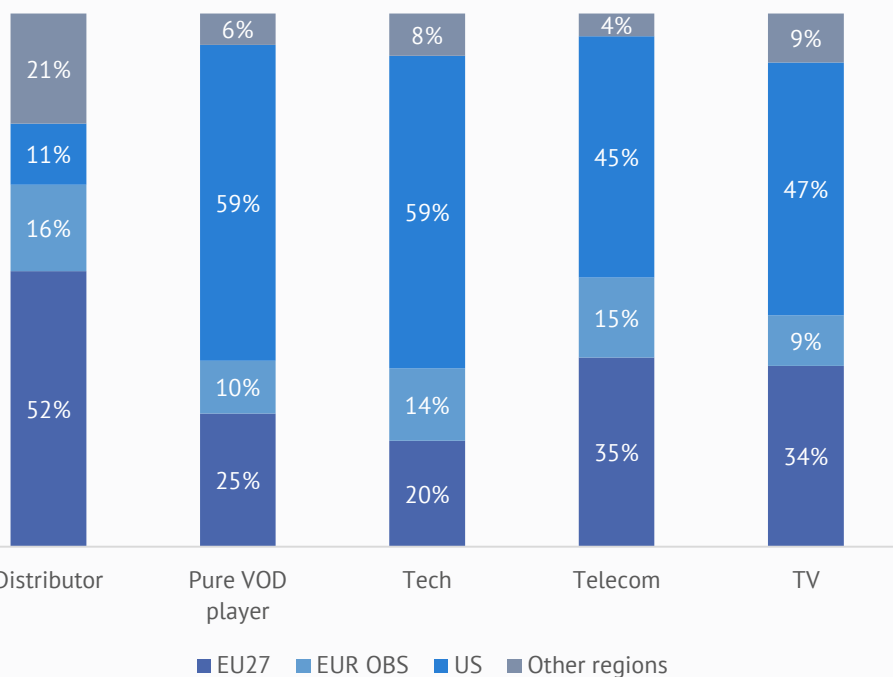
Core business	Number of TVOD catalogues	Average number of seasons/catalogue	Number of SVOD catalogues	Average number of seasons/catalogue
Distributor	3	166	5	116
Pure VOD player	7	283	43	1 197
Tech	23	1 388	50	403
Telecom	8	379	27	693
TV	6	1 492	32	373
Private equity			3	75

Source:
JustWatch data

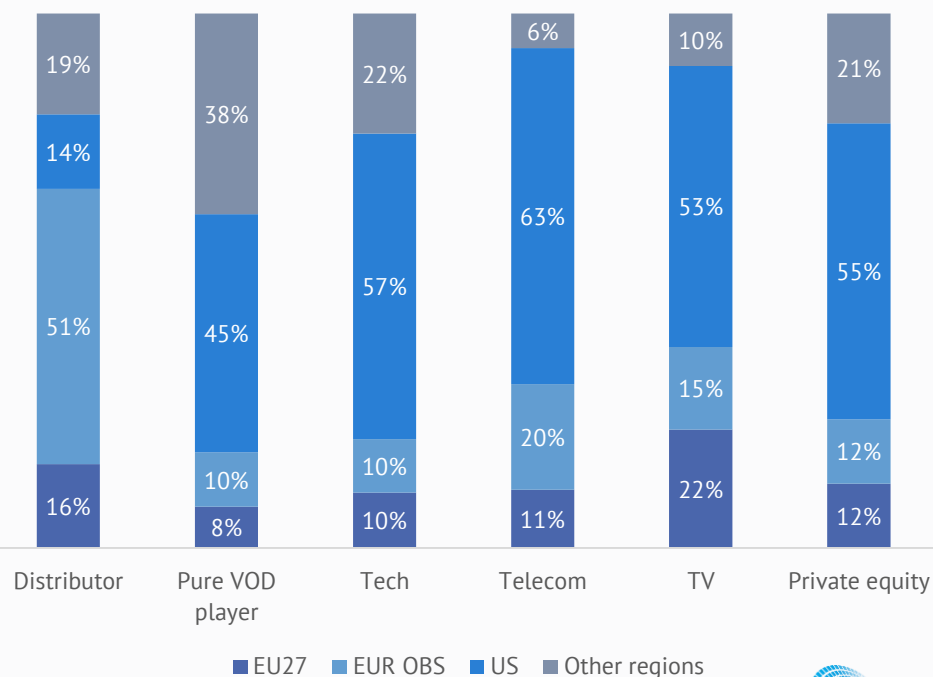
Sharp differences in the composition of catalogues by core business of service owners

- ▶ Services owned by **distributors, telecom and TV players** had the highest share of EU27 TV seasons on TVOD, and TV and distributors owned catalogues had the largest EU27 TV content on SVOD.
- ▶ For SVOD, Pure VOD players built their catalogues on US and Other international TV seasons.
- ▶ The highest share of US seasons was found in SVOD services operated by telecom and tech players, and in TVOD, on Pure VOD players and tech players (all of them rounding 69% of US content).

TVOD – Share of TV seasons by core business of service owner



SVOD – Share of TV seasons by core business of service owner

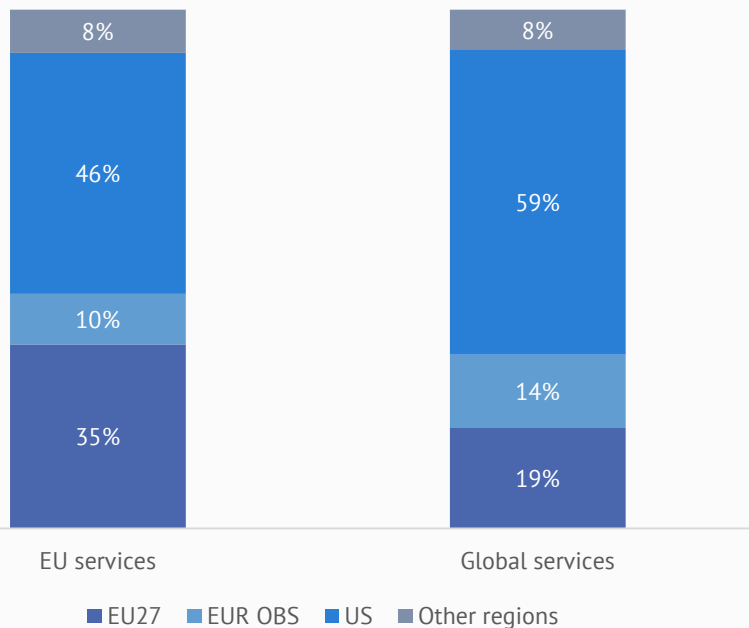


Source: JustWatch data

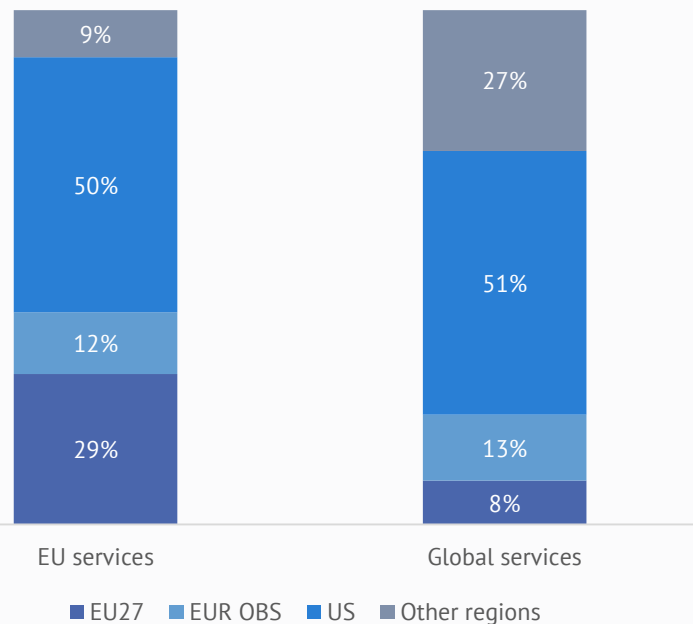
Higher share of EU TV content for EU owned services...

- The share of EU27 TV seasons in the catalogues of EU27 owned services was higher, with 35% on TVOD and 29% on SVOD while global services had a EU27 seasons share of 19% on TVOD and 8% on SVOD.
- SVOD global services showed a higher share of content from outside US and Europe (27%) than European.

TVOD – Share of TV seasons by origin of service owner



SVOD – Share of TV seasons by origin of service owner



Origin of service owner	Number of TVOD catalogues	Average number seasons/catalogue	Number of SVOD catalogues	Average number seasons/catalogue
EU	23	591	26	394
Global	24	1 366	134	693

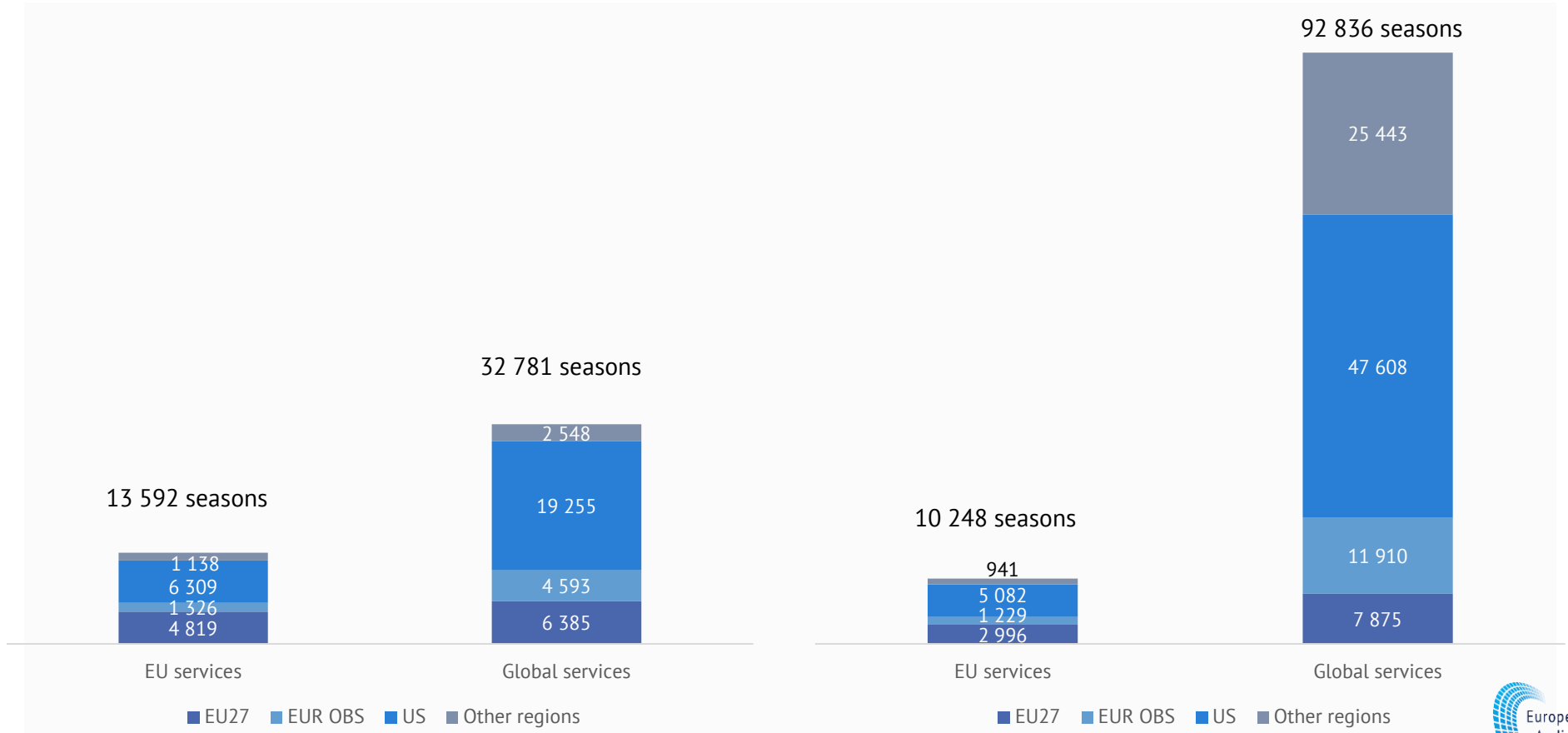
Source:
JustWatch data

...But the total offer of EU seasons was higher for global services, mainly on SVOD

- In absolute numbers, **global services offered more TV seasons** and thus also **more EU27 seasons than EU27 owned services** (9,7 times more on SVOD; 3,5 times more on TVOD).
- SVOD global services offered 10 times more other regions seasons than global TVOD services.

TVOD – Number of TV seasons by origin of service owner

SVOD – Number of TV seasons by origin of service owner



Source: JustWatch data

C.5 – Composition of catalogues by national and EU27 non-national TV contents

TV content on this section was analysed in **cumulated number of seasons**.

National TV seasons on TVOD vs EU27 non-national content on SVOD

- ▶ EU27 TV content catalogues on TVOD was composed by more than half of national seasons (56%).
- ▶ On the contrary, EU27 non-national TV seasons represented almost the majority (72%) on SVOD: for some services (Netflix, Amazon) the worldwide rights acquisition of content made European content available on all their European catalogues.

National TV seasons offering was dominant on national TVOD services

- ▶ On TVOD, national services had a higher share (74%) of national TV seasons than multi-country services (51%) in their EU27 offering.
- ▶ On the other hand, multi-country services offered a bigger number of EU seasons and thus also more national TV seasons in absolute numbers.

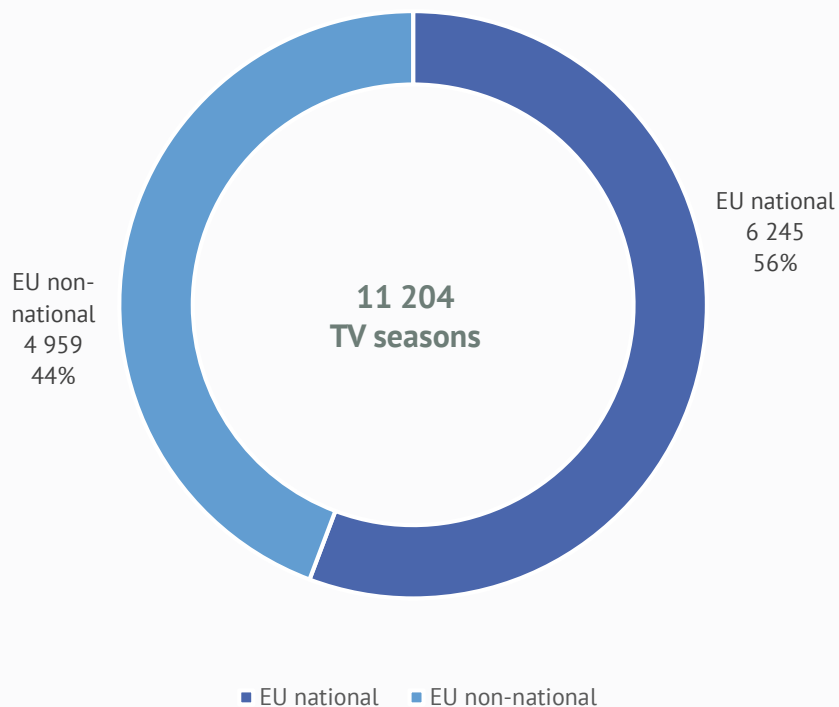
National SVOD services also built their offer on national TV seasons

- ▶ On SVOD, national services also relied importantly on national TV content for their EU27 offering with a 72% share of national TV seasons.
- ▶ As on TVOD, multi-country services offered more EU TV seasons in volume and thus also more national content in absolute terms.
- ▶ EU27 non-national accounted for almost 80% of the EU27 offering on multi-country SVOD services.

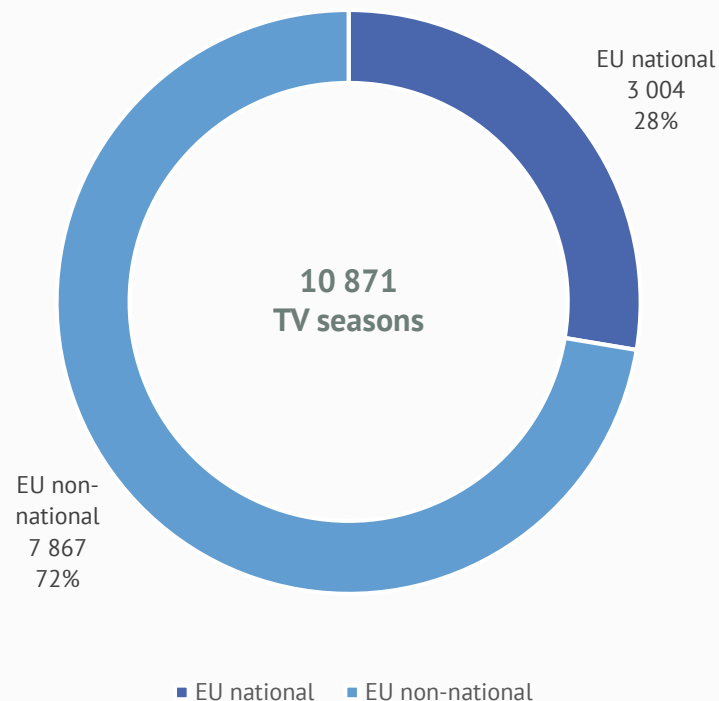
National TV seasons on TVOD, while EU27 non-national content con SVOD

- ▶ EU TV content catalogues on TVOD was composed by **more than half of national seasons (56%)**.
- ▶ On the contrary, EU27 non-national TV seasons represent almost the majority (72%) on SVOD, showing as their main source for EU27 content.

TVOD - Split of national and EU non-national TV seasons



SVOD - Split of national and EU non-national TV seasons

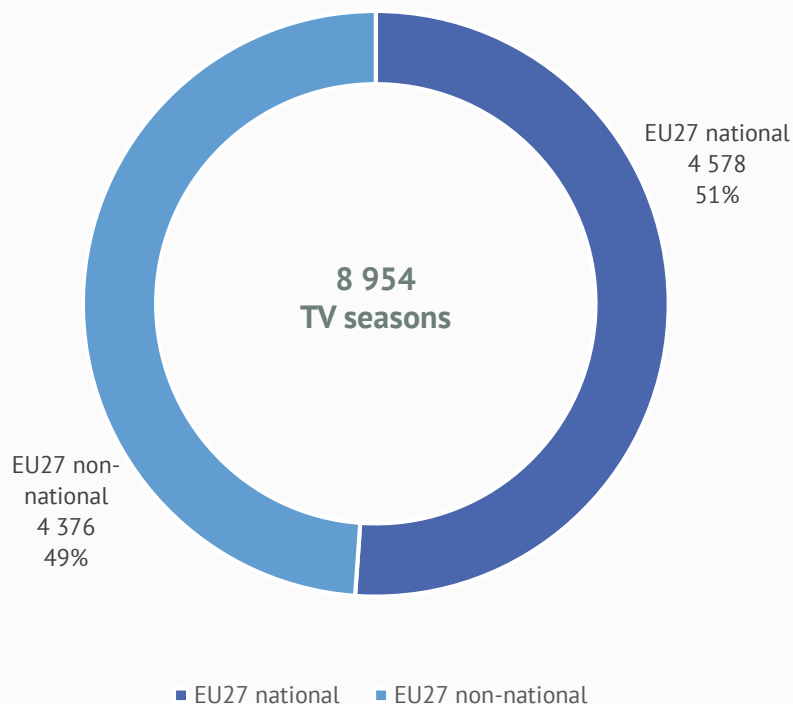


Source: JustWatch data

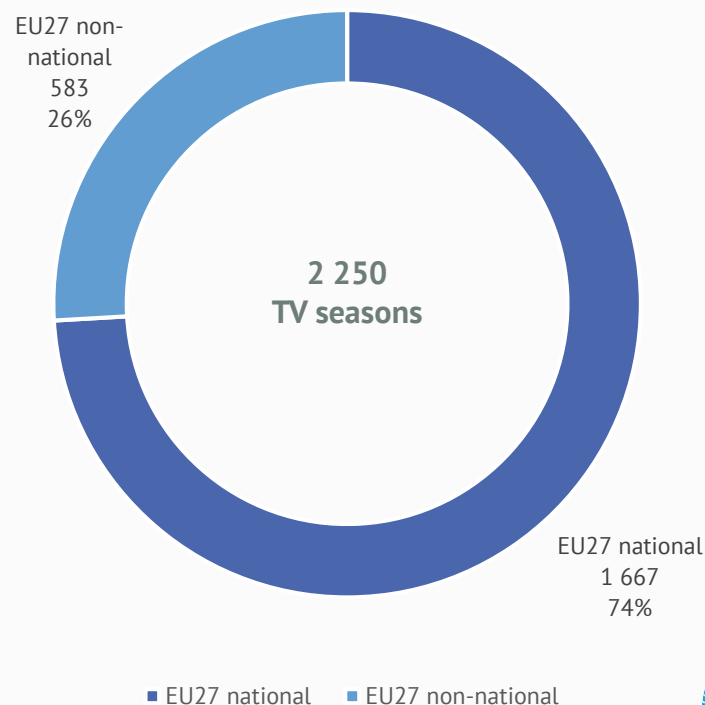
National TV seasons offering was dominant on national TVOD services

- ▶ On TVOD, national services had a higher share (74%) of national TV seasons than multi-country services (51%) in their EU27 offering.
- ▶ On the other hand, multi-country services offered a bigger number of EU seasons and thus also more national TV seasons in absolute numbers.

TVOD multi-country services - National vs EU non-national seasons



TVOD national services - National vs EU non-national seasons

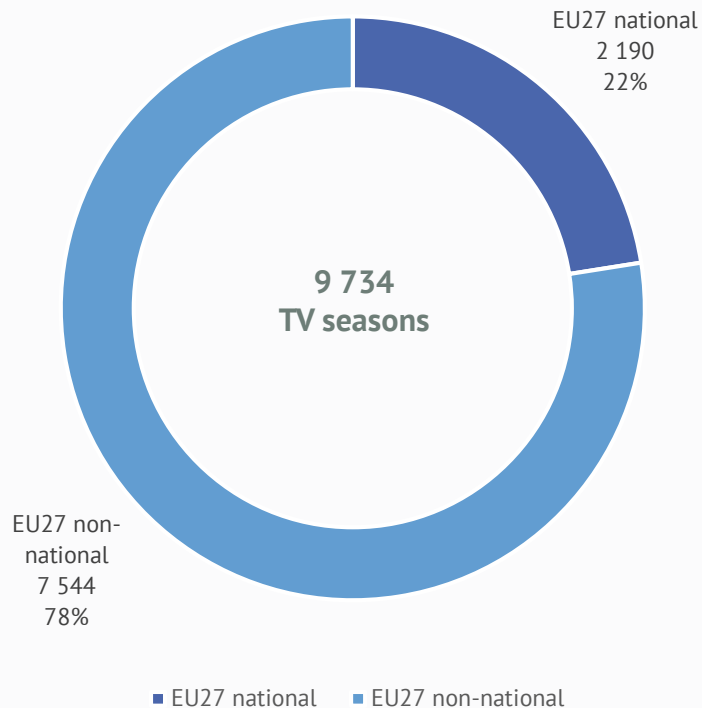


Source: JustWatch data

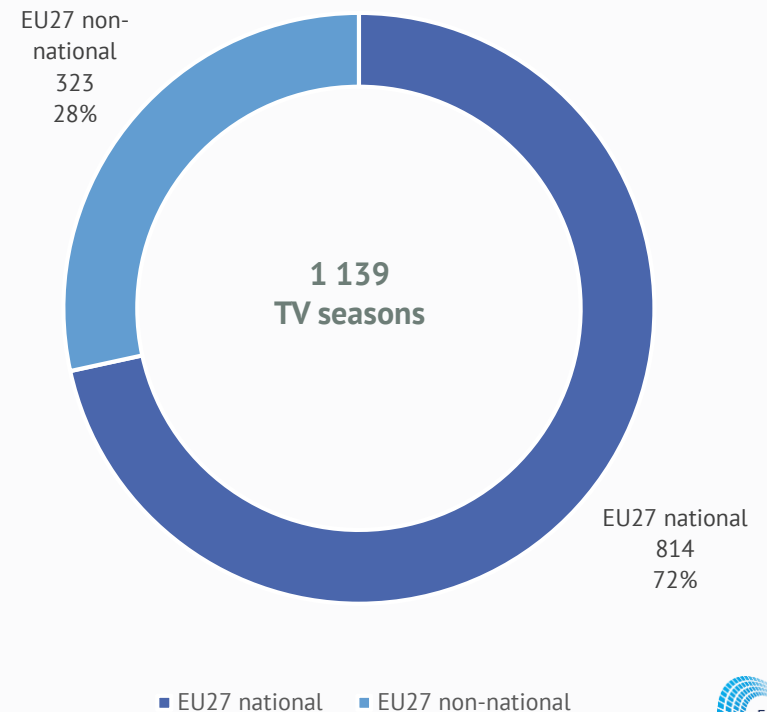
National SVOD services equally built their offer on national TV seasons

- ▶ On SVOD, national services also relied importantly on national TV content for their EU27 offering with a 72% share of national TV seasons.
- ▶ As on TVOD, multi-country services offered more EU TV seasons in volume and thus also more national.
- ▶ EU27 non-national accounted for almost 80% of the EU27 offering on multi-country SVOD services.

SVOD multi-country services - National vs EU non-national seasons



SVOD national services - National vs EU non-national seasons



C.6 – Focus on the Export of European TV contents in EU27, on TVOD and SVOD

TV content was analysed in **cumulated number of seasons**. Only EU27 non-national content is considered.

On TVOD services, German TV seasons dominated the export of EU27 TV content (with almost half of the offer)

- ▶ French exported seasons appeared second in volume, followed by TV seasons from Nordic countries, Austria, Italy, Ireland and Spain.
- ▶ On multi-country TVOD services, almost half of EU27 exported content was of German origin, and together with French, Swedish and Danish they represented 78% of the offer.
- ▶ **With the United Kingdom being accounted as Other European country after Brexit, British TV seasons dominated the export of EUR OBS TV content on TVOD services with 95% of total.**

On SVOD, France appeared as the top TV content exporter with 25% of all EU27 exports

- ▶ EU4 (France, Germany, Spain and Italy) provided 67% of all EU27 TV seasons exported on SVOD.
- ▶ Multi-country and national SVOD services both showed EU4 main origin of exports (67%), but if French content showed always first, the other three countries showed alternating provision shares.
- ▶ **As for TVOD, British TV seasons made up the lion share of Other European seasons on SVOD with 90% of all.**

A big presence in number of seasons did not ensure a better export of content

- ▶ Countries with a lower number of TV seasons available showed a better country export rate.

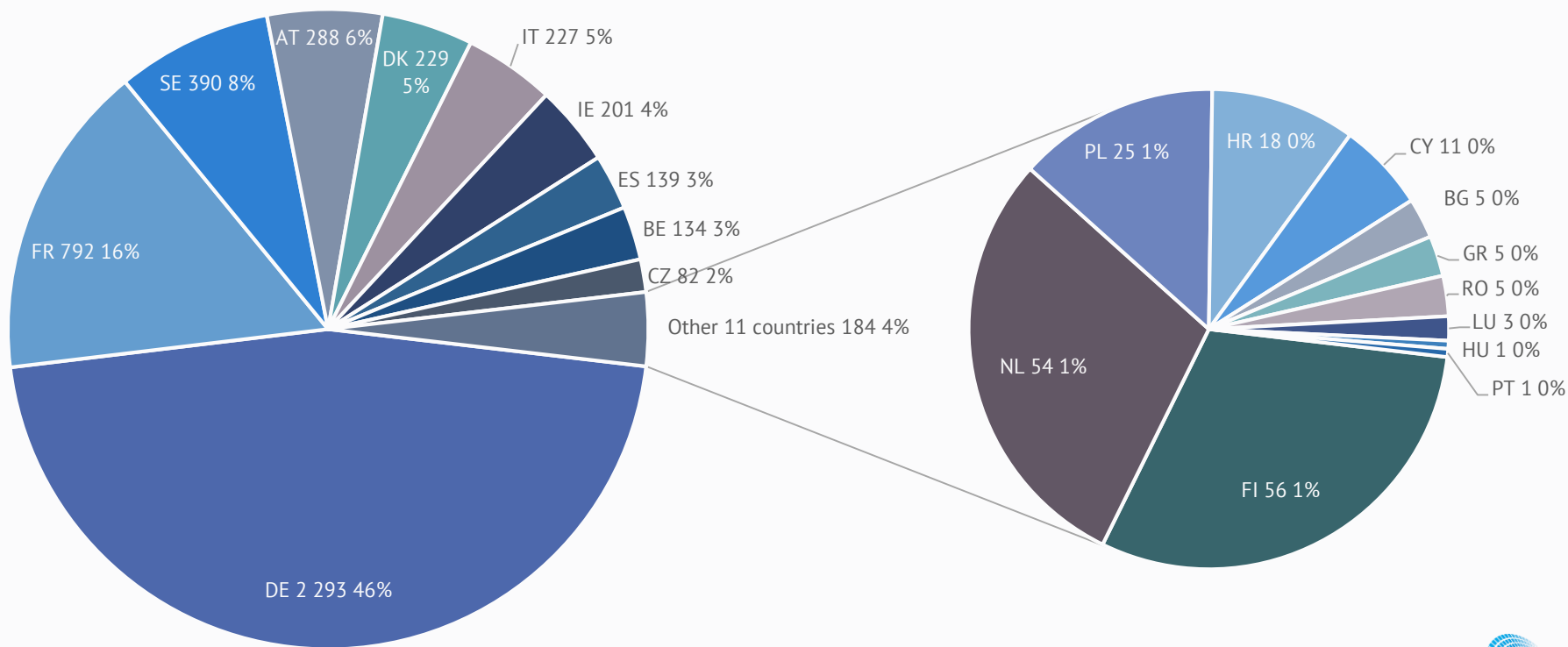
Better export rates on SVOD than on TVOD. Recent High-end series reached most countries in export

- ▶ High-end series (counting 2 to 13 episodes per season) were exported to more countries than longer formats, notably on SVOD catalogues where they represented 81% of EU27 exports.

21 EU27 countries exported their TV content on EU27 TVOD services

- ▶ German TV seasons, with almost half of the offer (*), dominated the export of EU27 TV content on TVOD services, while French exported seasons appeared second in volume.
- ▶ Nordic countries, Austrian, Italian, Irish, Spanish, Belgian and Czech TV seasons completed the top 10 export countries, while other 11 EU countries exports represented only 4% of all EU seasons exported.

TVOD – Number of EU27 TV seasons exported outside of their national market, by country of origin

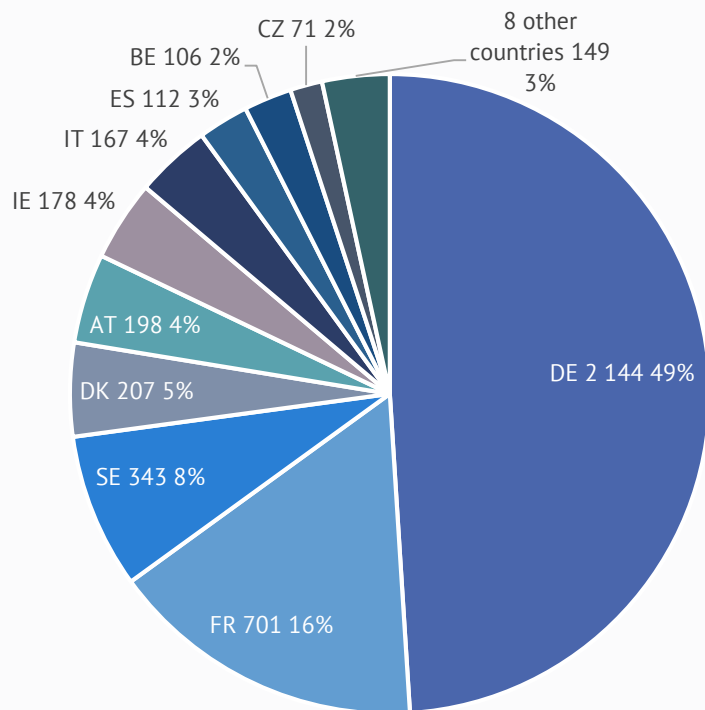


(*) Partly due to the weight of German and Austrian services in the sample.

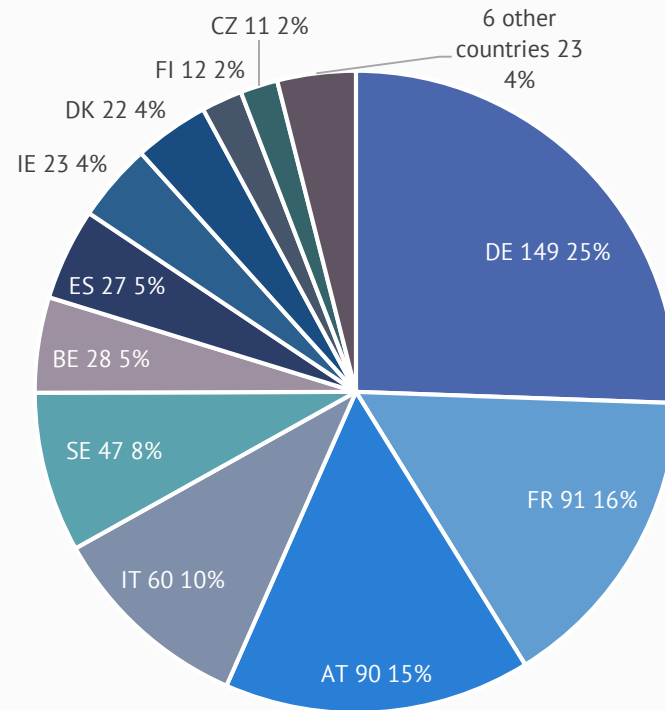
Origins of EU27 TV content for multi-country and national TVOD catalogues differed

- ▶ On multi-country TVOD services, almost half of EU27 exported content was of German origin (*), and together with French, Swedish and Danish content, it represented 78% of the offer.
- ▶ While on national TVOD services, German, French, Austrian (*), Italian and Swedish seasons represented the majority (75%) of all EU27 exported TV seasons.

Export of EU TV seasons in 33 multi-country TVOD catalogues



Export of EU TV seasons in 14 national TVOD catalogues



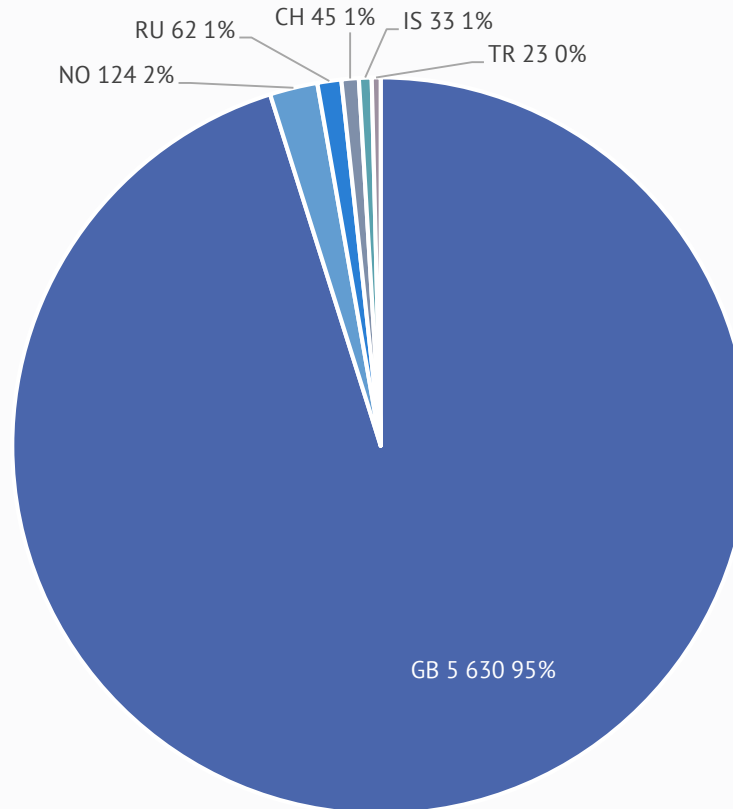
(*) Partly due to the weight of German and Austrian services in the sample.

Source: JustWatch data

Other European most exported TV seasons on TVOD were massively British

- ▶ With the **UK being accounted as Other European country after Brexit**, British TV seasons dominated the export of EUR OBS TV content on TVOD services with 95% of total.
- ▶ TV seasons from Norway, Russia, Switzerland, Island and Turkey completed the offer.

TVOD – EUR OBS TV seasons by country of origin

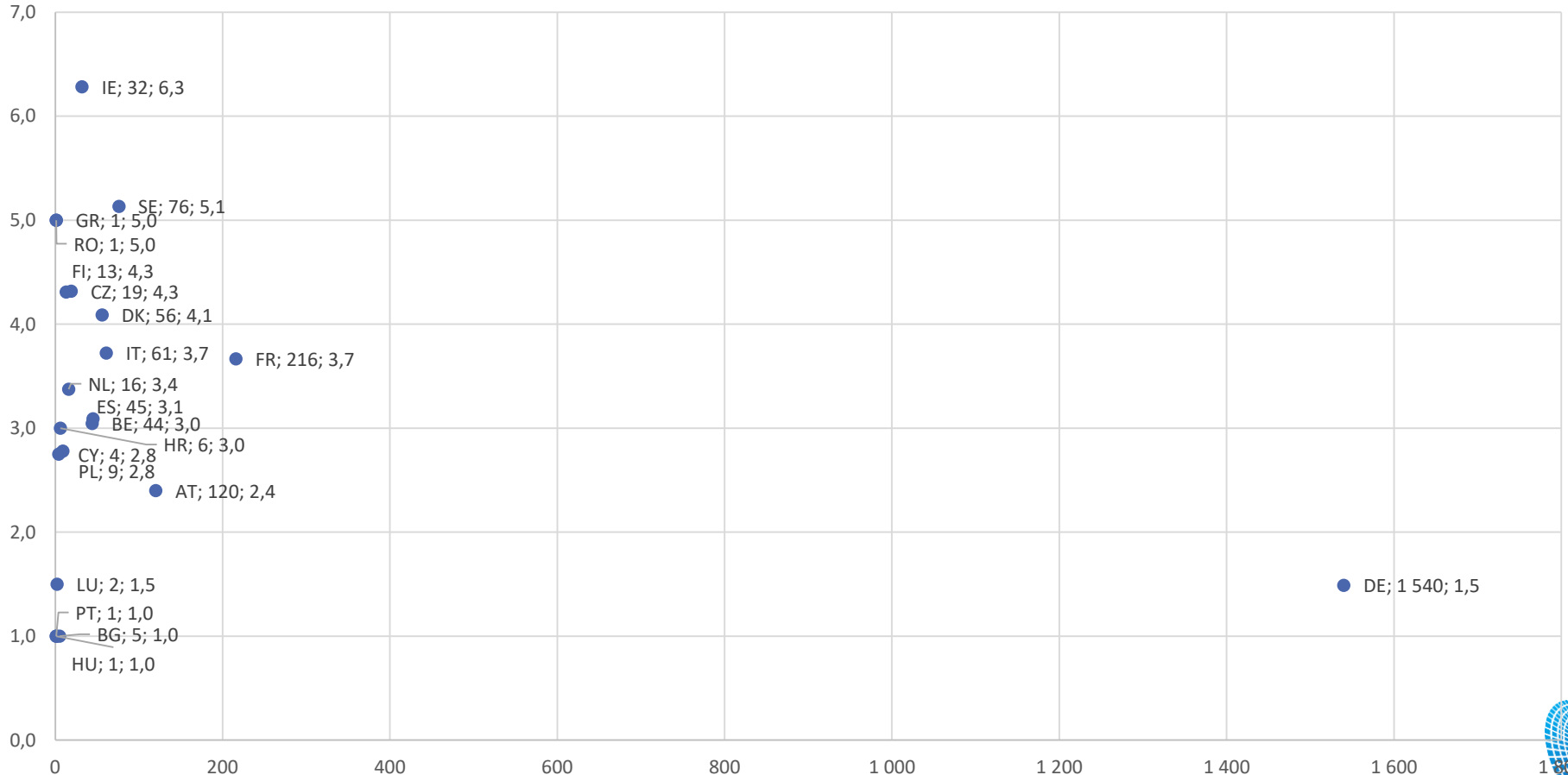


Source: JustWatch data

A big presence in number of seasons does not ensure a better circulation of content

- Countries with a lower number of TV seasons had a better country circulation, as opposed to German numerous seasons but exported only in an average 1,5 countries.
- French and Italian TV seasons showed the best (and equal) average exports circulation, but there was 3,5 times more French content.
- Culturally close countries were targeted export territories: 98% of Austrian content was exported to Germany, and 94% of German, to Austria

TVOD – Number of unique EU TV seasons exported outside of their country of origin and average non-national country presence



Read the matrix as: 803 German TV seasons were exported with an average country presence in 2,0 countries

Source:
JustWatch
data



Top 20 EU27 exported TV seasons on TVOD services: Ireland, France & Italy main providers

- ▶ 7 Irish, 5 French and 5 Italian TV seasons were the most exported on TVOD services in May 2020.
- ▶ The top list is completed by Nordic animated TV seasons (2 from Denmark and 1 from Finland).
- ▶ 13 seasons were co-productions of which 7 with at least with 2 European countries (including the UK).
- ▶ The median production year was 2015 (2014 for animation) and half were produced before 2015.
- ▶ The average episodes number per season was 11 for fiction and 56 for animated TV seasons.

Top 20 EU27 exported TV seasons in 47 TVOD catalogues

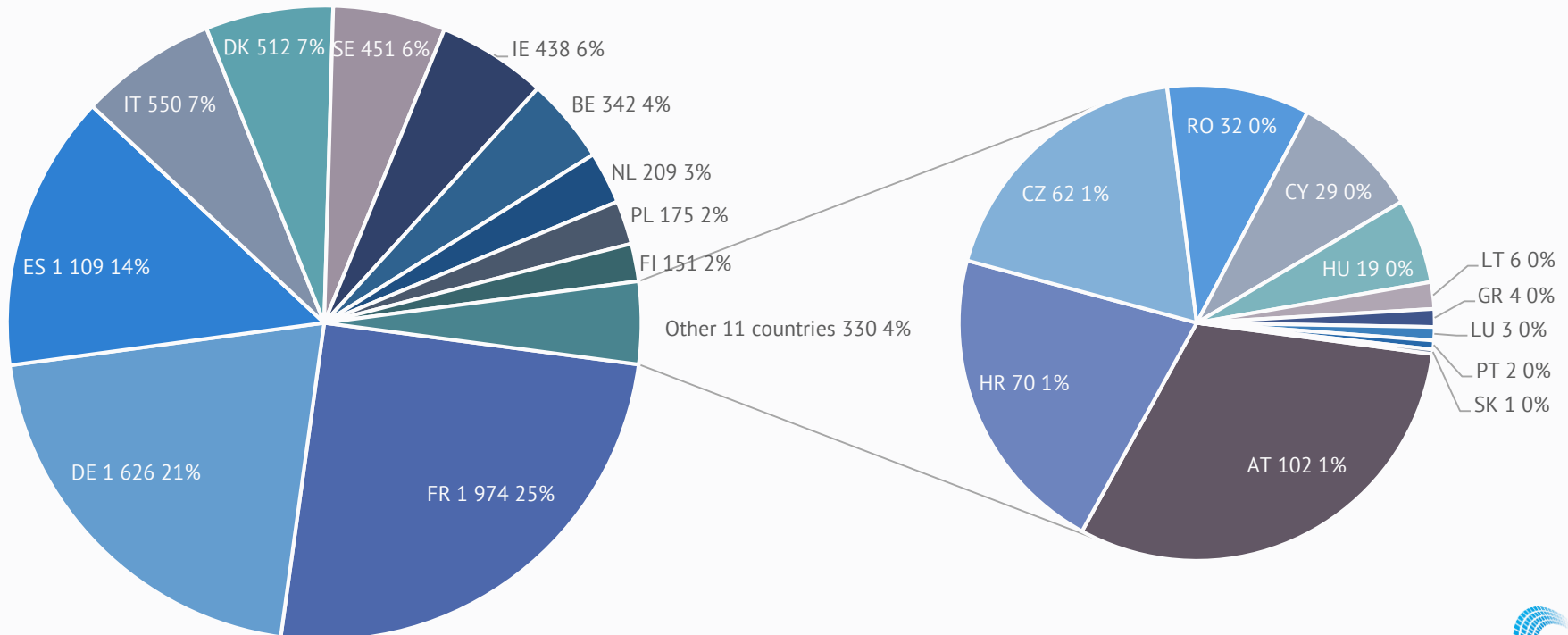
Original Season name	Year of production	Production country	Episodes	Export EU services	Export EU countries
Vikings 1	2013	IE,CA	9	51	18
Vikings 2	2014	IE,CA	10	48	18
Vikings 3	2015	IE,CA	10	48	18
LEGO Ninjago: Masters of Spinjitzu 1	2011	DK,SG,CA,US	13	38	18
PJ Masks 1	2015	FR,GB	104	35	17
Gomorra: La serie 1	2014	IT	12	34	15
Angry Birds Toons 1	2013	FI	52	32	18
Gomorra: La serie 4	2019	IT	12	32	14
LEGO Ninjago: Masters of Spinjitzu 2	2012	DK,SG,CA,US	13	32	17
Gomorra: La serie 3	2017	IT	12	31	15
Grizzy and the Lemmings 1	2017	FR	52	31	18
The Tudors 1	2007	IE,CA,US,GB	10	31	14
The Tudors 4	2010	IE,CA,US,GB	10	31	15
The Young Pope 1	2016	IT,FR,ES,GB,US	10	31	17
Gomorra: La serie 2	2016	IT	13	30	15
Taken 1	2017	FR,US	10	29	18
Au service de la France 1	2015	FR	12	28	16
PJ Masks 2	2018	FR,GB	104	28	15
The Tudors 2	2008	IE,CA,US,GB	10	28	14
The Tudors 3	2009	IE,CA,US,GB	8	28	14

Source: JustWatch data

22 EU27 countries exported their TV content on EU27 SVOD services

- ▶ On SVOD, France appeared as the top TV content exporter with 25% of all EU27 exports while EU4 (FR, DE, ES, IT) provided 67% of all EU27 TV seasons exported on SVOD.
- ▶ The remaining 11 countries represented only 4% of all EU27 exported TV seasons on SVOD.

SVOD – Number of EU TV seasons exported outside of their national market, by country of origin

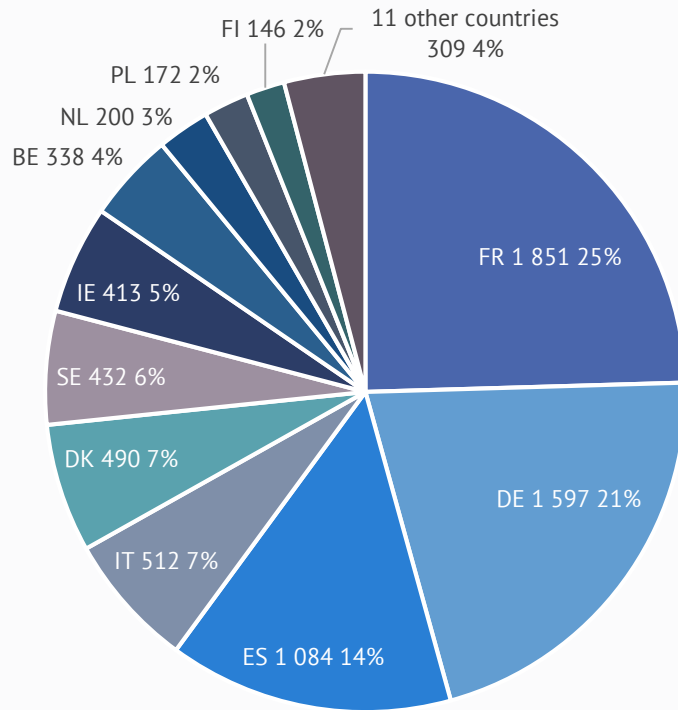


Source: JustWatch data

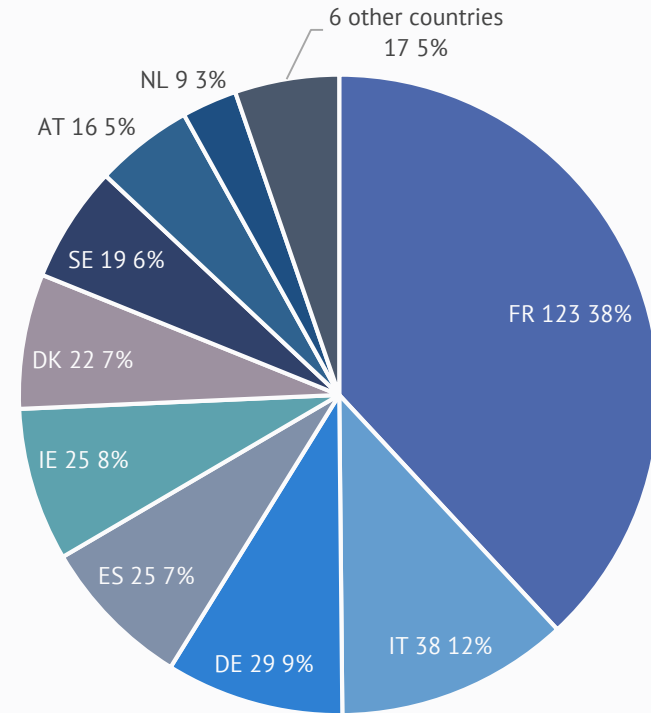
Multi-country and national SVOD services both showed EU4 main origin of exports

- ▶ Both for multi-country and national SVOD catalogues, **EU4 exported TV seasons represented 67% of all exported EU27 content**, but if French always first, the other three countries alternated order.
- ▶ **Apart from EU4 countries**, most represented origin of EU27 exported TV seasons were **Denmark, Ireland and Sweden**, although not on the same order on multi-country and on national SVOD catalogues.

Export of EU TV seasons in 144 multi-country SVOD catalogues



Export of EU TV seasons in 16 national SVOD catalogues

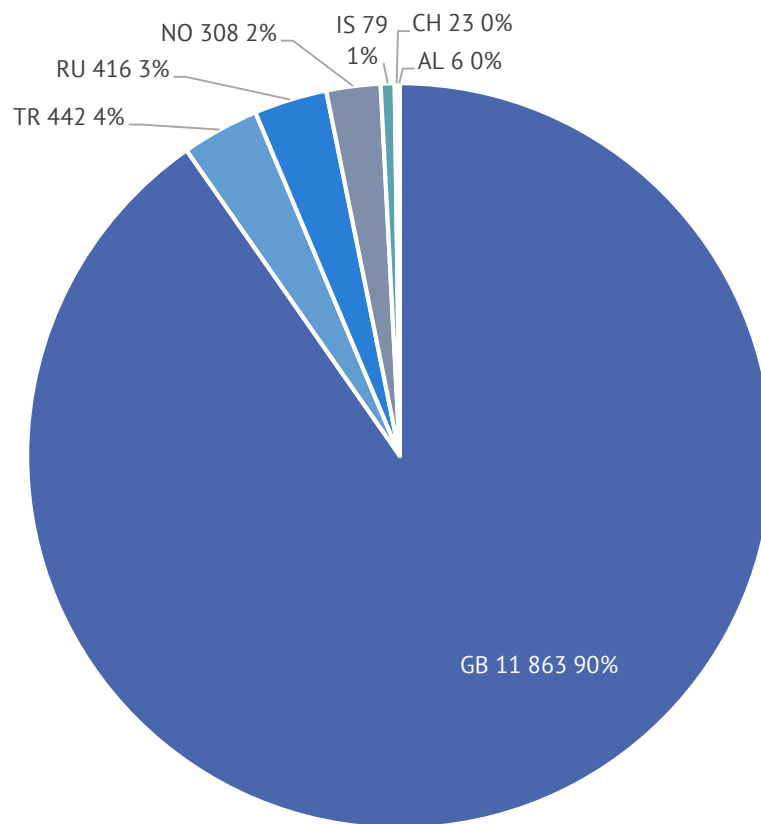


Source: JustWatch data

On SVOD also, Other European most exported TV seasons are fundamentally British

- ▶ As for TVOD, **British TV seasons made up the lion share of EUR OBS seasons on SVOD with 90%.**
- ▶ Turkey, Russia and Norway made up a bigger share of TV seasons than on TVOD, shyly followed by Iceland, Switzerland and Albania to complete the Other European exports of TV seasons on SVOD.

SVOD – EUR OBS TV seasons by country of origin

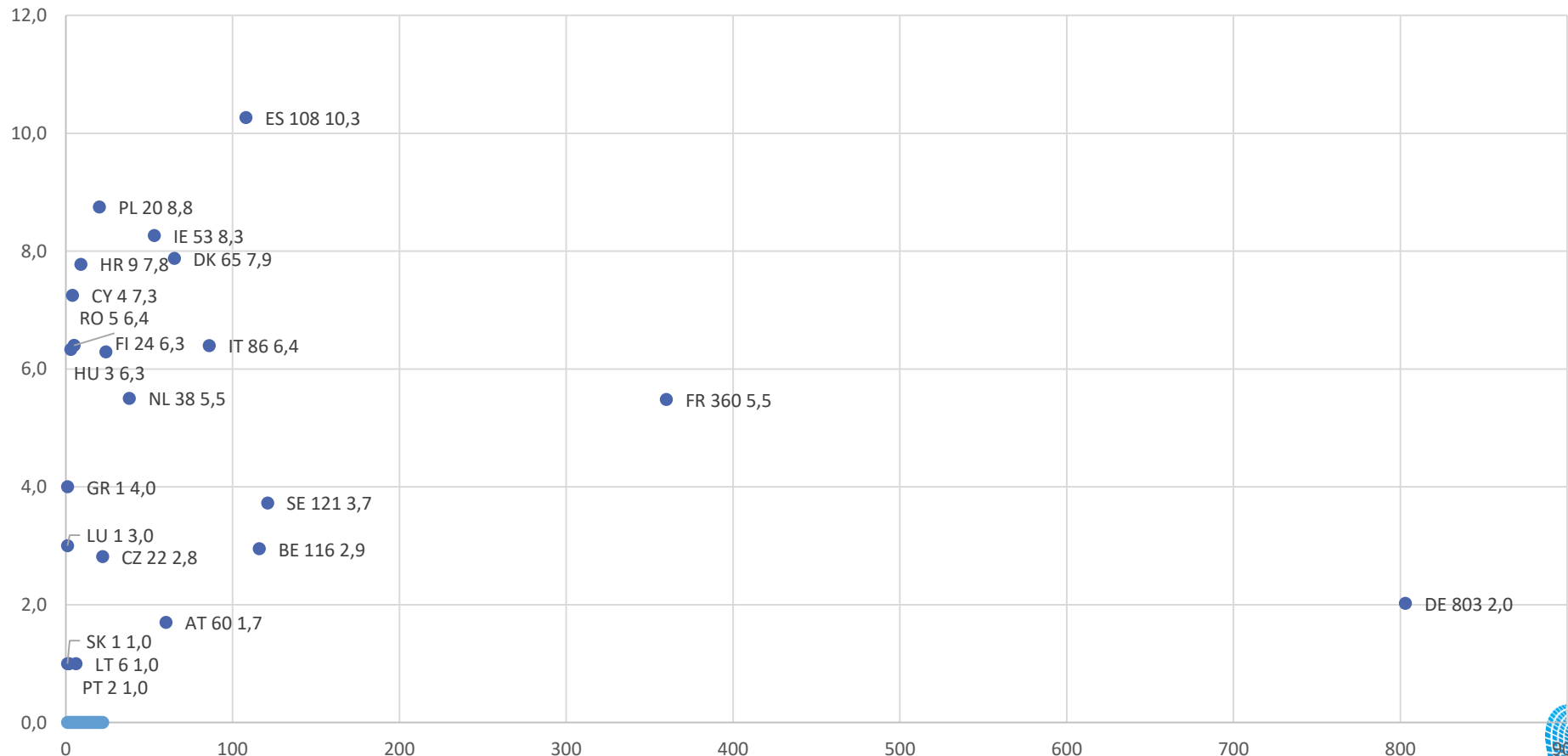


Source: JustWatch data

On SVOD, better export results even when lower volumes of TV seasons

- Of EU4, Spanish content circulated the best, even with a lower number of TV seasons, followed by Italian, French and German.
- Poland, Ireland, Denmark or Croatia also showed a high country circulation for a smaller number of TV seasons exported on SVOD services.
- Heavy exporters such as Germany and France showed a lower circulation but with many more TV seasons exported.

SVOD – Number of unique EU27 TV seasons exported outside of their country of origin and average non-national country presence



Source:
JustWatch
data

Read the matrix as, 360 French TV seasons were exported with an average country presence in 5,5 countries

Top 20 EU27 exported TV seasons on SVOD services: Danish & French animation dominated

- ▶ 7 Danish and 5 French animated TV seasons among the most exported seasons on SVOD services in May 2020.
- ▶ The top list is completed by fiction seasons from Germany, Ireland, Italy, Belgium and Spain.
- ▶ 11 titles were co-productions of which just 1 with 2 European countries (FR & GB). Many co-productions from European countries with Asia, which is quite specific to the animation industry.
- ▶ The median production year was 2016 (2015 for animation) and 85% were produced in 2015 or later.
- ▶ The average episodes number per season was 11 for fiction and 27 for animated TV seasons.

Top 20 EU27 exported TV seasons in 47 TVOD catalogues

Original Season name	Year of production	Production country	Episodes	Export EU services	Export EU countries
LEGO Ninjago: Masters of Spinjitzu 5	2015	DK,SG,CA,US	10	41	18
Vikings 4	2016	IE,CA	20	40	17
LEGO Ninjago: Masters of Spinjitzu 6	2016	DK,SG,CA,US	10	37	18
Molang 1	2015	FR,US,GB	52	37	18
LEGO Nexo Knights 1	2015	DK	12	36	18
Vikings 5	2017	IE,CA	20	36	17
Deutschland 83 1	2015	DE	8	31	17
LEGO Ninjago: Masters of Spinjitzu 3	2013	DK,SG,CA,US	8	25	15
LEGO Ninjago: Masters of Spinjitzu 4	2015	DK,SG,CA,US	10	25	15
Miraculous: Tales of Ladybug & Cat Noir 1	2015	FR,KR,JP	26	25	17
LEGO Ninjago: Masters of Spinjitzu 7	2017	DK,SG,CA,US	10	23	11
LEGO Ninjago: Masters of Spinjitzu 8	2018	DK,SG,CA,US	10	23	11
La víctima número 8 1	2018	ES	8	22	18
Miraculous: Tales of Ladybug & Cat Noir 2	2016	FR,KR,JP	25	22	15
Tabula Rasa 1	2017	BE	9	22	15
Zig et Sharko 2	2016	FR	78	22	18
Zeit der Geheimnisse 1	2019	DE	3	21	18
ZeroZeroZero 1	2019	IT	8	21	12
Academia Regala 1	2016	IT	26	20	15
Oscar's Oasis 1	2011	FR	78	20	17

Source: JustWatch data

Focus on series format: recent High-end series were best exported format, on SVOD

- ▶ EU27 TV content was exported (beyond the country of origin) to more countries on SVOD than on TVOD.
- ▶ High-end series (series counting 2 to 13 episodes per season) were more exported than longer formats.
- ▶ **Recent high-end series** (2010-2020) were the **most exported format**, reaching in average 5,5 countries of export on SVOD. They represented **81% of total EU27 exports on SVOD** and 52% on TVOD.

Average export ratio per format, on TVOD and on SVOD



Average export ratio per format, recent series, on TVOD and on SVOD



Source: JustWatch data

Annex

Services and country catalogues included in the film and TV samples

TVOD catalogues and countries in the film sample

Name of service	Name of service	Name of service
Aerovod CZ	Google Play Movies BE	Microsoft Films & TV DE
alles kino AT	Google Play Movies CZ	Microsoft Films & TV DK
alles kino DE	Google Play Movies DE	Microsoft Films & TV ES
Amazon TVOD AT	Google Play Movies DK	Microsoft Films & TV FI
Amazon TVOD DE	Google Play Movies EE	Microsoft Films & TV FR
Atres Player ES	Google Play Movies ES	Microsoft Films & TV IE
Bbox VOD FR	Google Play Movies FI	Microsoft Films & TV IT
Canal VOD FR	Google Play Movies HU	Microsoft Films & TV NL
Chili AT	Google Play Movies IE	Microsoft Films & TV SE
Chili DE	Google Play Movies IT	MyTF1vod FR
Chili IT	Google Play Movies LT	O2TV CZ
Chili PL	Google Play Movies LV	Orange VOD FR
cinema[s] @ la demande FR	Google Play Movies NL	Pantaflix AT
EntertainTV DE	Google Play Movies PL	Pantaflix DE
FilmDoo AT	Google Play Movies PT	Pantaflix FR
FilmDoo BE	Google Play Movies SE	Pathé Thuis NL
FilmDoo BG	Google Play Movies SK	Prima Videopůjčovna CZ
FilmDoo CY	Infinity TV IT	Rakuten TV CZ
FilmDoo CZ	iTunes AT	Rakuten TV DK
FilmDoo DE	iTunes BE	Rakuten TV FI
FilmDoo DK	iTunes CZ	Rakuten TV IE
FilmDoo EE	iTunes DE	Rakuten TV NL
FilmDoo ES	iTunes DK	Rakuten TV PL
FilmDoo FI	iTunes EE	Rakuten TV PT
FilmDoo FR	iTunes ES	Rakuten TV SE
FilmDoo GR	iTunes FI	Rakuten TV SK
FilmDoo HR	iTunes FR	RakutenTV AT
FilmDoo HU	iTunes HU	RakutenTV BE
FilmDoo IE	iTunes IE	RakutenTV DE
FilmDoo IT	iTunes IT	RakutenTV ES
FilmDoo LT	iTunes LT	RakutenTV FR
FilmDoo LU	iTunes LV	RakutenTV IT
FilmDoo LV	iTunes NL	Sky Store AT
FilmDoo MT	iTunes PL	Sky Store DE
FilmDoo NL	iTunes PT	Sky Store IE
FilmDoo PL	iTunes RO	UniversCiné Belgium BE
FilmDoo PT	iTunes SE	Videobuster AT
FilmDoo RO	iTunes SK	Videobuster DE
FilmDoo SE	K2Studio SK	Volta IE
FilmDoo SI	Kino on Demand DE	YouTube Movies DE
FilmDoo SK	Kino VOD Club AT	YouTube Movies FR
Filmin TVOD ES	LaCinetek FR	YouTube Movies HU
Filmo TV FR	Maxdome Store AT	YouTube Movies PL
Flimmit AT	Maxdome Store DE	YouTube Movies PT
Flimmit DE	MEO PT	Ziggo NL
Google Play Movies AT	Microsoft Films & TV AT	

Country	Services
AT	14
BE	5
BG	1
CY	1
CZ	7
DE	16
DK	5
EE	3
ES	7
FI	5
FR	13
GR	1
HR	1
HU	4
IE	7
IT	7
LT	3
LU	1
LV	3
MT	1
NL	7
PL	6
PT	6
RO	2
SE	5
SI	1
SK	5

Source: JustWatch, Filmtoro, Chili, La Pantalla Digital, EUROVOD catalogue data

SVOD catalogues and countries in the film sample

Name of service	Name of service	Name of service	Name of service
Acorn TV DK	C More FI	Kividoo AT	Obbod SK
Acorn TV NL	C More SE	Kividoo DE	OCS GO FR
Acorn TV SE	DaFilms CZ	Magio Kino SK	Otta SK
All 4 IE	Disney Life IE	Maxdome AT	realzey DE
Amazon Prime Video AT	Disney+ AT	Maxdome DE	Ruutu FI
Amazon Prime Video BE	Disney+ DE	Mediaset Premium Play IT	SFR Play FR
Amazon Prime Video CZ	Disney+ ES	Movistar+ ES	Shudder AT
Amazon Prime Video DE	Disney+ FR	MUBI AT	Shudder DE
Amazon Prime Video DK	Disney+ IE	MUBI BE	Shudder IE
Amazon Prime Video EE	Disney+ IT	MUBI CZ	Sky GO AT
Amazon Prime Video ES	Disney+ NL	MUBI DE	Sky GO DE
Amazon Prime Video FI	Filmbox CZ	MUBI DK	Sky GO IE
Amazon Prime Video FR	Filmbox SK	MUBI EE	Sky GO IT
Amazon Prime Video HU	Filmin Plus ES	MUBI ES	Sky NOW TV IE
Amazon Prime Video IE	Filmtastic Amazon Channel DE	MUBI FI	Sky Now TV IT
Amazon Prime Video IT	Fubo TV ES	MUBI FR	Sky Ticket DE
Amazon Prime Video LT	Go3 EE	MUBI HU	Sky X AT
Amazon Prime Video LV	Go3 LT	MUBI IE	Starz Play Amazon Channel DE
Amazon Prime Video NL	Go3 LV	MUBI IT	TIMvision IT
Amazon Prime Video PL	GuideDoc AT	MUBI LT	TV Now DE
Amazon Prime Video PT	GuideDoc DE	MUBI LV	UnivisCine DE
Amazon Prime Video RO	GuideDoc DK	MUBI NL	UPC My Prime PL
Amazon Prime Video SE	GuideDoc EE	MUBI PL	Viaplay DK
Animax Plus Amazon Channel DE	GuideDoc ES	MUBI PT	Viaplay EE
Anime on Demand DE	GuideDoc FI	MUBI RO	Viaplay FI
Apple TV+ AT	GuideDoc IE	MUBI SE	Viaplay LT
Apple TV+ BE	GuideDoc IT	MUBI SK	Viaplay LV
Apple TV+ CZ	GuideDoc LT	Netflix AT	Viaplay SE
Apple TV+ DE	GuideDoc LV	Netflix BE	Videoland NL
Apple TV+ DK	GuideDoc NL	Netflix CZ	Viki Rakuten DE
Apple TV+ EE	GuideDoc PL	Netflix DE	Voyo SK
Apple TV+ ES	GuideDoc SE	Netflix DK	Yelo Play BE
Apple TV+ FI	HBO GO CZ	Netflix EE	YouTube Premium AT
Apple TV+ FR	HBO GO HU	Netflix ES	YouTube Premium BE
Apple TV+ HU	HBO GO PL	Netflix FI	YouTube Premium DE
Apple TV+ IE	HBO Go PT	Netflix FR	YouTube Premium DK
Apple TV+ IT	HBO GO RO	Netflix HU	YouTube Premium ES
Apple TV+ LT	HBO GO SK	Netflix IE	YouTube Premium FI
Apple TV+ LV	HBO Nordic DK	Netflix IT	YouTube Premium FR
Apple TV+ NL	HBO Nordic FI	Netflix LT	YouTube Premium HU
Apple TV+ PL	HBO Nordic SE	Netflix LV	YouTube Premium IE
Apple TV+ PT	Herzokino Amazon Channels DE	Netflix NL	YouTube Premium IT
Apple TV+ SE	Horizon HU	Netflix PL	YouTube Premium PT
Be tv BE	Horizon RO	Netflix PT	YouTube Premium SE
Be2Can CZ	Horizon/UPC PL	Netflix RO	
BluTV DE	IPLA PL	Netflix SE	
C More DK	Joyn DE	Obbod CZ	

Country	Services
AT	12
BE	7
CZ	9
DE	23
DK	10
EE	7
ES	10
FI	10
FR	8
HU	7
IE	12
IT	11
LT	7
LV	7
NL	8
PL	9
PT	6
RO	5
SE	10
SK	7

Source: JustWatch, Filmtoro, Chili, La Pantalla Digital, EUROVOD catalogue data

TVOD catalogues and countries in the TV sample

Name of service	Name of service
Amazon TVOD AT	Microsoft Films & TV ES
Amazon TVOD DE	Microsoft Films & TV FI
AtresPlayer ES	Microsoft Films & TV FR
Bbox VOD FR	Microsoft Films & TV IE
Canal VOD FR	Microsoft Films & TV IT
Chili AT	Microsoft Films & TV NL
Chili DE	Microsoft Films & TV SE
Chili IT	MyTF1vod FR
Chili PL	O2TV CZ
EntertainTV DE	Orange VOD FR
Filmin TVOD ES	Pantaflix AT
Flimmit AT	Pantaflix DE
Flimmit DE	Pantaflix FR
Google Play Movies & TV AT	Rakuten TV AT
Google Play Movies & TV DE	Rakuten TV BE
Google Play Movies & TV FR	Rakuten TV DE
Infinity TV IT	Rakuten TV ES
iTunes DE	Rakuten TV FR
iTunes FR	Rakuten TV IT
Maxdome Store AT	Sky Store IE
Maxdome Store DE	Videobuster AT
Microsoft Films & TV AT	Videobuster DE
Microsoft Films & TV DE	Ziggo NL
Microsoft Films & TV DK	

Country	TVOD services
AT	9
BE	1
CZ	1
DE	11
DK	1
ES	4
FI	1
FR	9
IE	2
IT	4
NL	2
PL	1
SE	1
Total	47

SVOD catalogues and countries in the TV sample

Name of service	Name of service	Name of service	Name of service
Acorn TV DK	Apple TV+ PL	HBO Go PT	Shudder IE
Acorn TV NL	Apple TV+ PT	HBO GO RO	Sky ES
Acorn TV SE	Apple TV+ SE	HBO Nordic DK	Sky GO AT
All 4 IE	Be tv BE	HBO Nordic FI	Sky GO DE
Amazon Prime Video AT	BluTV DE	HBO Nordic SE	Sky GO IE
Amazon Prime Video BE	C More DK	Herzkino Amazon Channels DE	Sky GO IT
Amazon Prime Video CZ	C More FI	Horizon HU	Sky NOW TV IE
Amazon Prime Video DE	C More SE	Horizon RO	Sky NOW TV IT
Amazon Prime Video DK	Canal+ Séries FR	Horizon/UPC PL	Sky Ticket DE
Amazon Prime Video EE	Crunchyroll AT	Joyn DE	Sky X AT
Amazon Prime Video ES	Crunchyroll DE	Kividoo AT	Starz Play Amazon Channel DE
Amazon Prime Video FI	Crunchyroll DK	Kividoo DE	TIMvision IT
Amazon Prime Video FR	Crunchyroll ES	Maxdome AT	TV Now DE
Amazon Prime Video HU	Crunchyroll FI	Maxdome DE	Viaplay DK
Amazon Prime Video IE	Crunchyroll FR	Mediaset Premium Play IT	Viaplay EE
Amazon Prime Video IT	Crunchyroll IT	Movistar+ ES	Viaplay FI
Amazon Prime Video LT	Crunchyroll NL	Netflix AT	Viaplay LT
Amazon Prime Video LV	Crunchyroll PT	Netflix BE	Viaplay LV
Amazon Prime Video NL	Crunchyroll RO	Netflix CZ	Viaplay SE
Amazon Prime Video PL	Crunchyroll SE	Netflix DE	Videoland NL
Amazon Prime Video PT	Disney+ AT	Netflix DK	Viki Rakuten DE
Amazon Prime Video RO	Disney+ DE	Netflix EE	Wanim DE
Amazon Prime Video SE	Disney+ ES	Netflix ES	Wanim DK
Animax Plus Amazon Channel DE	Disney+ FR	Netflix FI	Wanim FI
Anime on Demand DE	Disney+ IE	Netflix FR	Wanim FR
Apple TV+ AT	Disney+ IT	Netflix HU	Wanim SE
Apple TV+ BE	Disney+ NL	Netflix IE	watchbox AT
Apple TV+ CZ	Fubo TV ES	Netflix IT	Yelo Play BE
Apple TV+ DE	Go3 EE	Netflix LT	YouTube Premium AT
Apple TV+ DK	Go3 LT	Netflix LV	YouTube Premium BE
Apple TV+ EE	Go3 LV	Netflix NL	YouTube Premium DE
Apple TV+ ES	hayu DK	Netflix PL	YouTube Premium DK
Apple TV+ FI	hayu FI	Netflix PT	YouTube Premium ES
Apple TV+ FR	hayu IE	Netflix RO	YouTube Premium FI
Apple TV+ HU	hayu NL	Netflix SE	YouTube Premium FR
Apple TV+ IE	hayu SE	OCS GO FR	YouTube Premium HU
Apple TV+ IT	HBO España ES	Ruutu FI	YouTube Premium IE
Apple TV+ LT	HBO GO CZ	SFR Play FR	YouTube Premium IT
Apple TV+ LV	HBO GO HU	Shudder AT	YouTube Premium PT
Apple TV+ NL	HBO GO PL	Shudder DE	YouTube Premium SE

Country	SVOD services
AT	12
BE	6
CZ	4
DE	20
DK	11
EE	5
ES	10
FI	11
FR	10
HU	6
IE	10
IT	10
LT	5
LV	5
NL	8
PL	5
PT	6
RO	5
SE	11
Total	160

Source: JustWatch data

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