

Film and TV content in VOD catalogues

2019 Edition

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

B. Films in VOD catalogues in the EU

C. TV contents in VOD catalogues in the EU

For each section, six subsections:

1. Size of catalogues
2. Number of unique contents available in catalogues
3. Origin and circulation of contents (titles, seasons and episodes)
4. Focus on services' core business and ownership
5. Composition of catalogues by national and EU non-national contents
6. Focus on the export of EU contents in the EU on TVOD and SVOD

Introduction

- ▶ The aim of this report is to provide the first global insight into the composition of VOD catalogues in Europe, 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 contents 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 EU non-national works in VOD catalogues?
 - ▶ Which EU production countries are the main exporters of film and TV titles on VOD in the EU?
- ▶ For film, 146 TVOD catalogues and 136 SVOD catalogues are analysed based on JustWatch, Ampere, Filmtoro, La Pantalla Digital and EUROVOD catalogue data. The data was collected in June 2019 and the titles were matched through databases with their countries of production.
- ▶ For TV content, the analysis is based on JustWatch data from 118 Subscription Video-On-Demand (SVOD) catalogues in 21 EU countries and on 53 Transactional Video-On-Demand (TVOD) catalogues from 14 EU countries. The data was collected in October 2019 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 taken into account.
- ▶ The contents are analysed as unique titles and as cumulated titles, seasons and episodes available on VOD.
- ▶ For the origin of a title, only the first country of production is taken into account. 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.
- ▶ The shares included in this report are only indicative and minor identification errors might have occurred.
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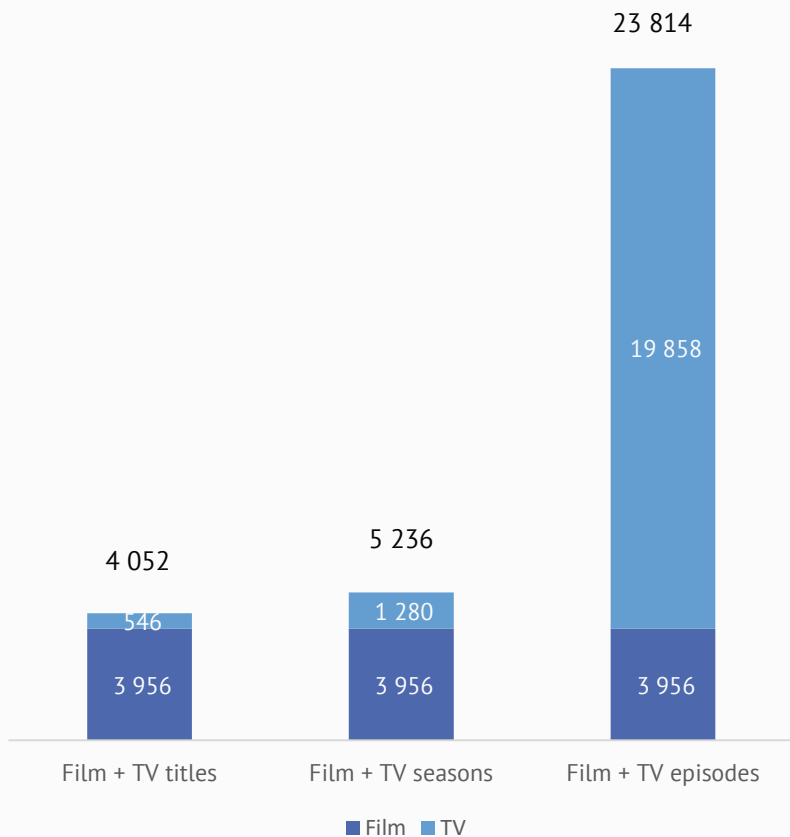
Main findings – Film and TV content

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.

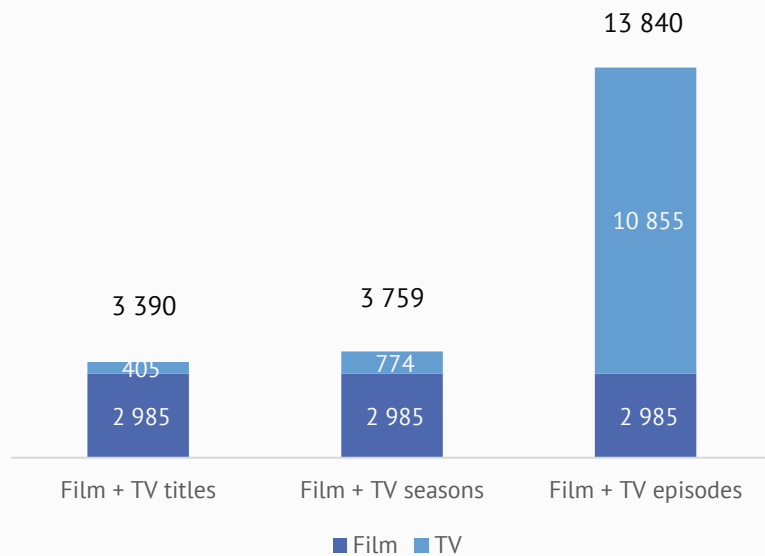
Average size of catalogues: the impact of choice of indicators on the results

- ▶ On average, there are more film titles than TV titles and TV seasons, but dominance of TV episodes
- ▶ Considering TV episodes, the TV content offer is five times bigger than the film titles offer on TVOD, 3.6 times bigger on SVOD

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



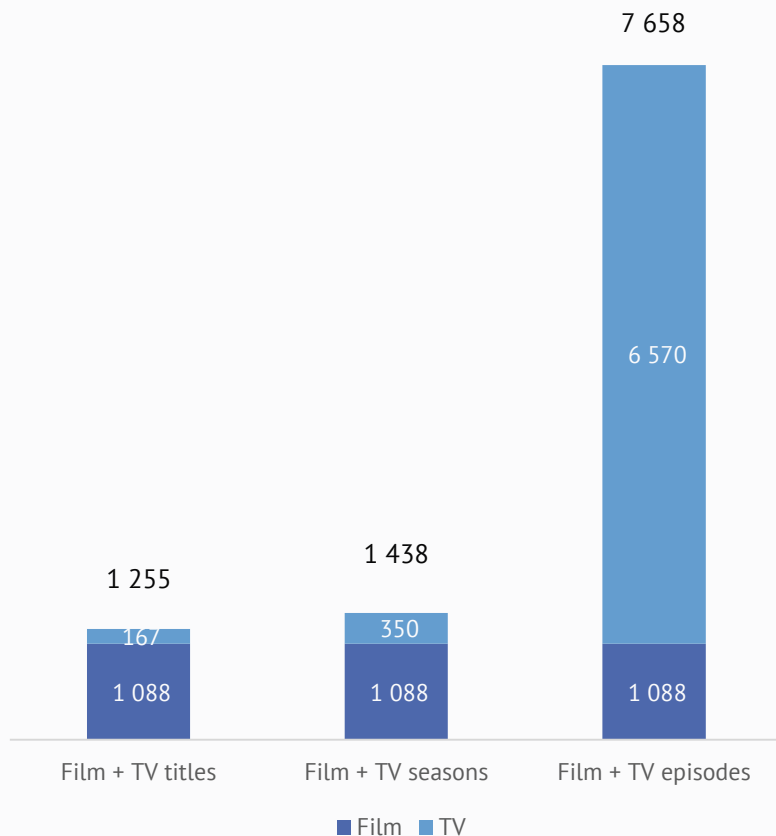
Size of SVOD catalogues in **average** number of contents



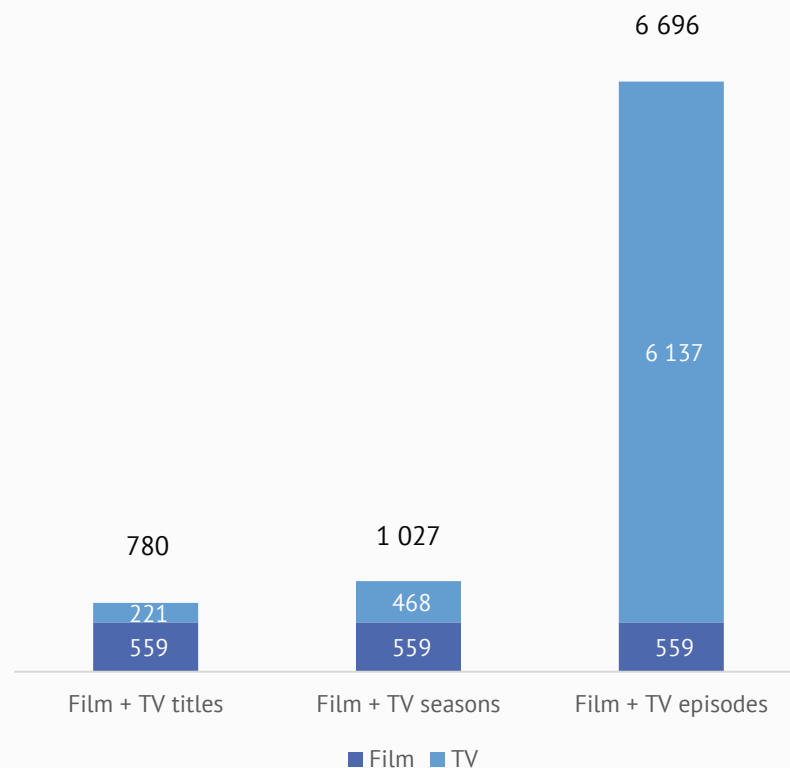
Median size of catalogues: the impact of choice of indicators on the results

- ▶ Median offer of Film titles is superior to median offer of TV titles & seasons on TVOD
- ▶ On SVOD, the offer of unique film titles is also higher but to a lesser extent than on TVOD
- ▶ In episodes, the TV content median offer is 11x bigger than the film offer on SVOD; 6x bigger in TVOD

Size of TVOD catalogues in median number of contents



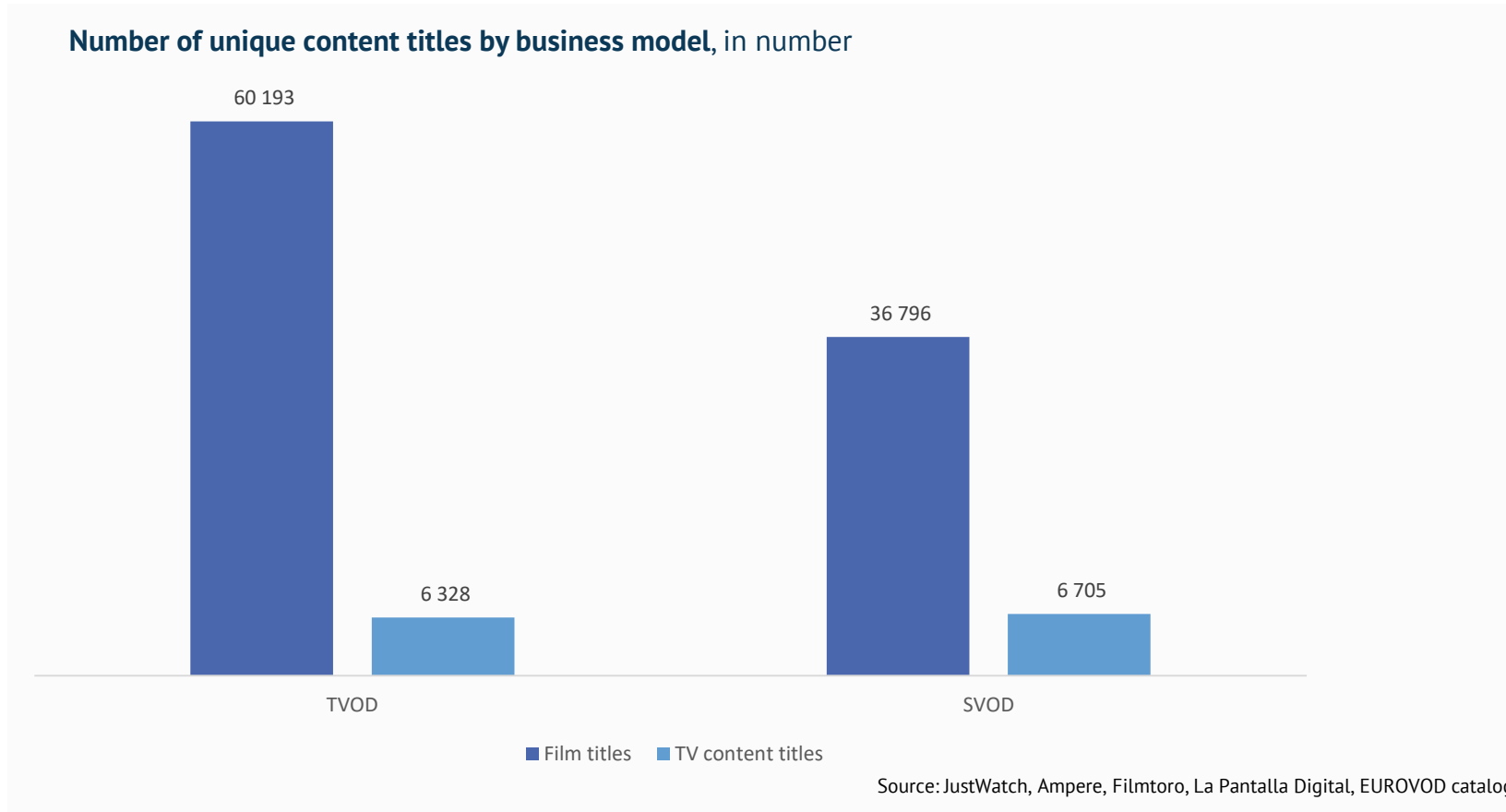
Size of SVOD catalogues in median number of contents



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

Unique film titles much more available than unique TV titles

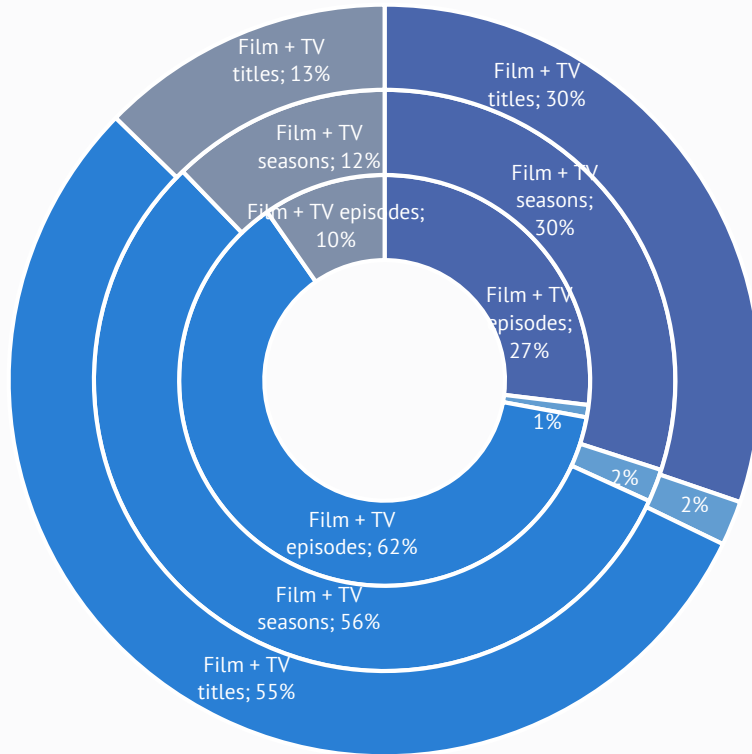
- ▶ The offer of unique film titles is much higher than the offer of unique TV content titles, 10x more unique film than TV titles on TVOD, 5x on SVOD
- ▶ Proportionally, TVOD is more film-oriented and SVOD is more series-oriented
- ▶ In total, TVOD services offered more unique titles than SVOD services



Origin by region of Films + TV titles, Films + TV seasons, Films + TV episodes

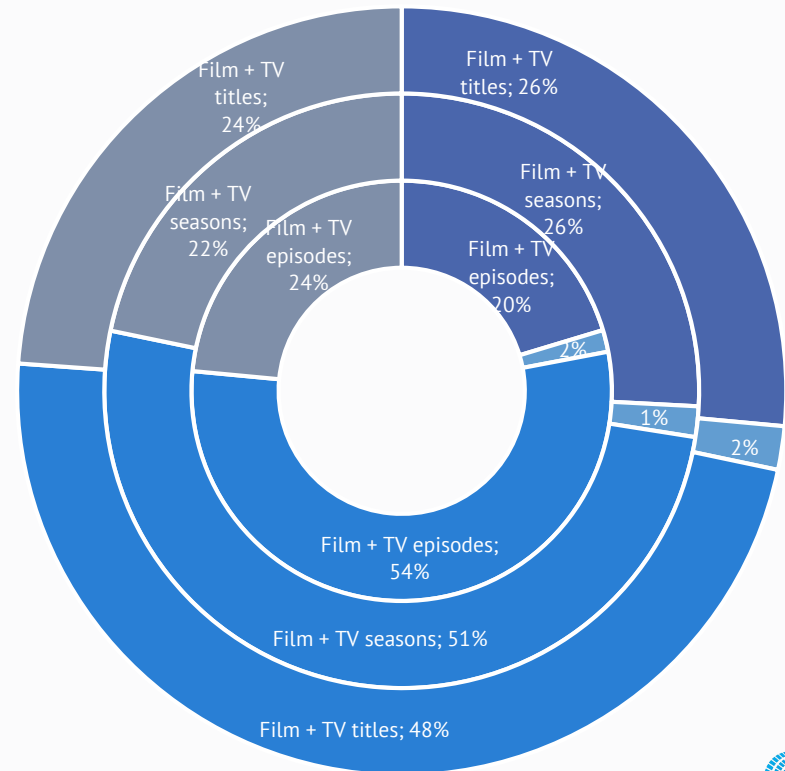
- ▶ While EU content represents 30% on TVOD and 26% on SVOD if films and TV titles and/or seasons are counted, the share falls to 27% on TVOD and 20% on SVOD if films and TV episodes are considered
- ▶ US content's share follows the opposite direction, highest when TV episodes are considered, lowest when TV titles are considered

Origin of Film + TV titles, seasons or episodes found on TVOD



■ EU 28 ■ EUR Obs ■ US ■ Other regions

Origin of Film + TV titles, seasons or episodes found on SVOD



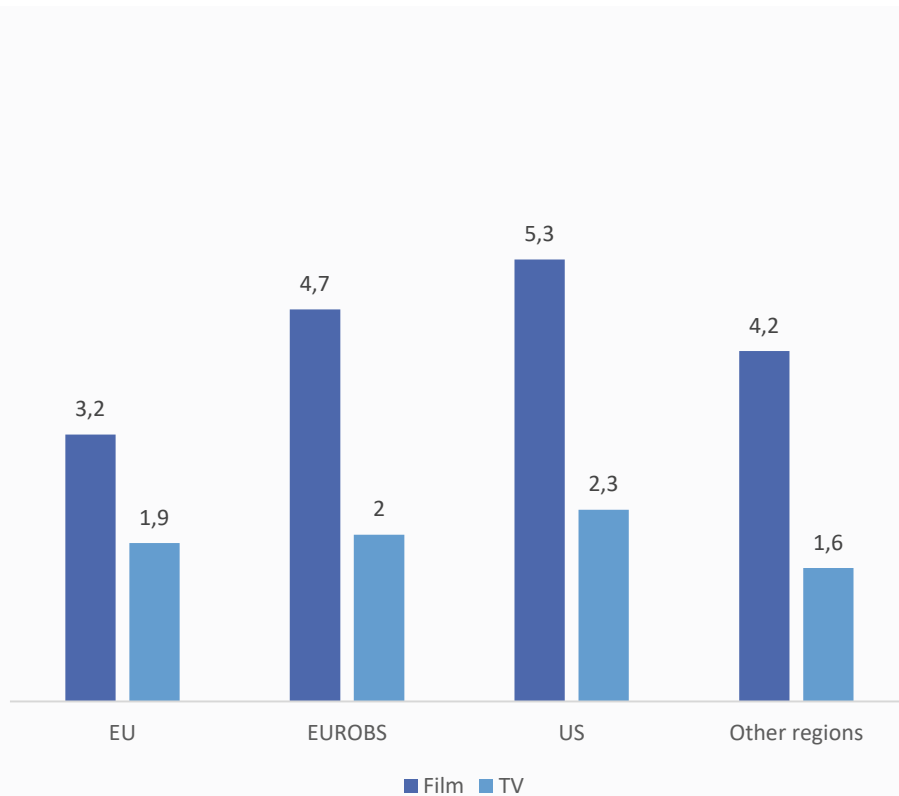
■ EU 28 ■ EUR Obs ■ US ■ Other regions

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

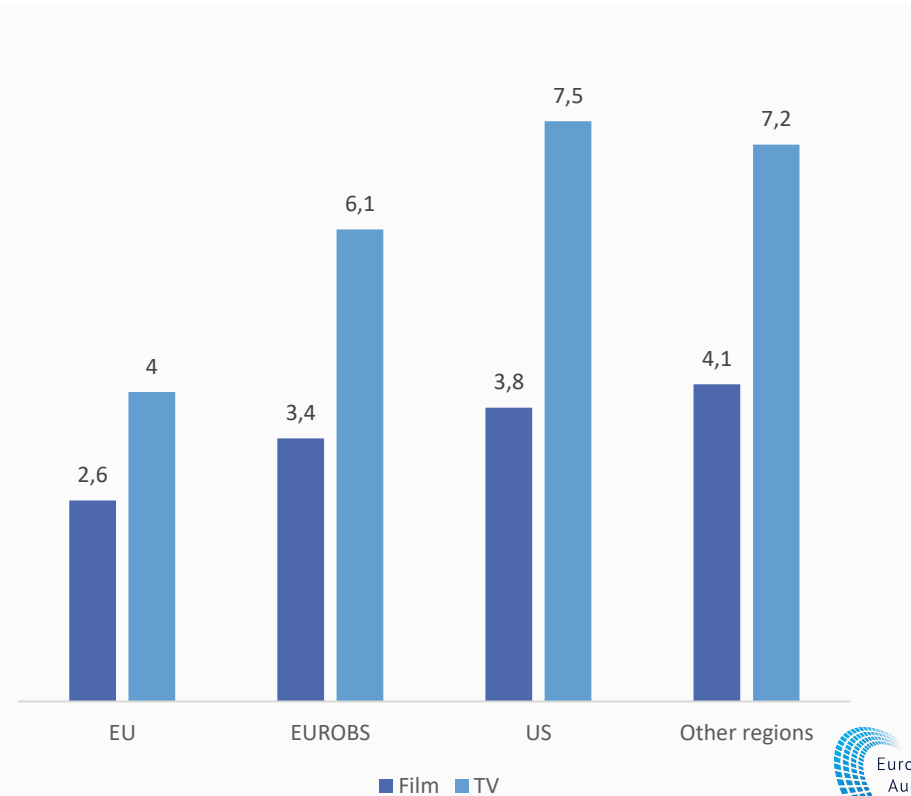
Country circulation of films and TV unique titles by region and by business model

- ▶ Both on TVOD and SVOD, for film and TV titles, **EU titles circulated** less in EU countries than the titles from all other regions (except other regions' TV titles on TVOD)
- ▶ **US titles circulated the best on TVOD for film and TV**, while on **SVOD film and TV titles from other regions and the US circulated the best**

Circulation on TVOD by number of **countries**



Circulation on SVOD by number of **countries**

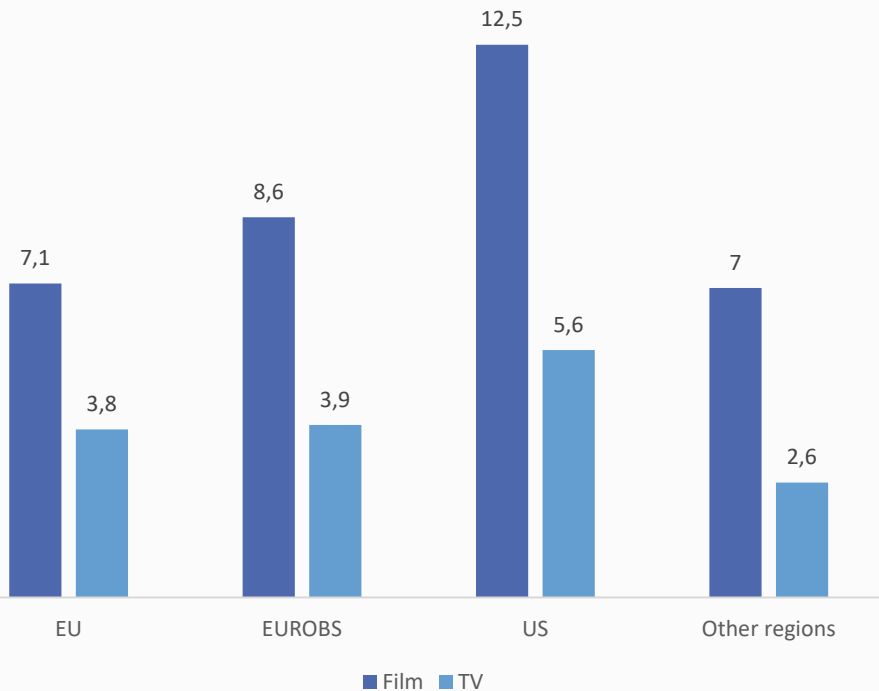


Source: JustWatch, Ampere, Filmtoro, La Pantalla Digital, EUROVOD catalogue data

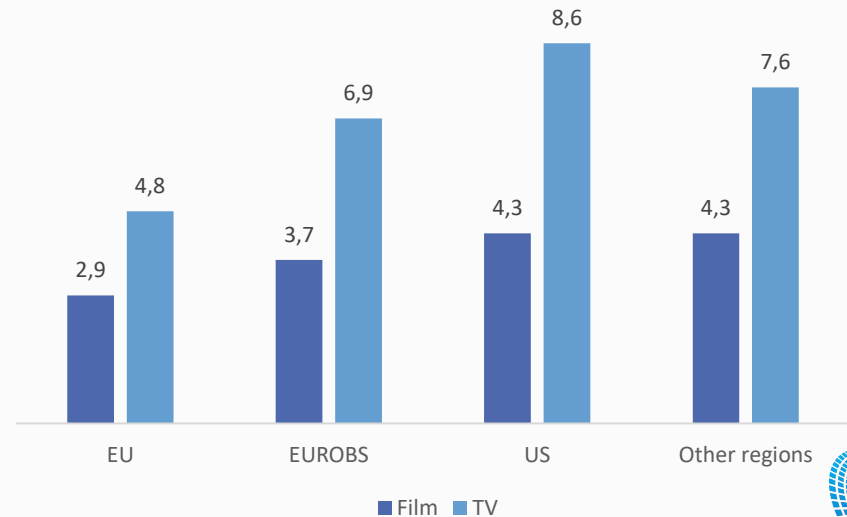
Service circulation of films and TV content by region and by business model

- ▶ **Films circulate better than TV titles on TVOD; TV titles circulate better than films on SVOD**
- ▶ When services are considered, EU film and TV titles circulated better on services than titles from other regions on TVOD. On SVOD on the other hand, EU titles, both film and TV, had the smallest services circulation for titles of all regions
- ▶ US titles, on TVOD and SVOD, film and TV, had the widest service circulation

Circulation on TVOD by number of **services**



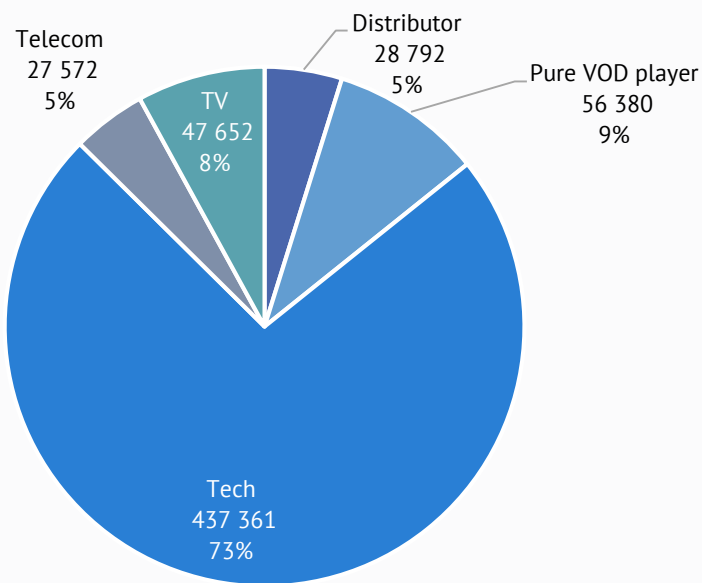
Circulation on SVOD by number of **services**



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

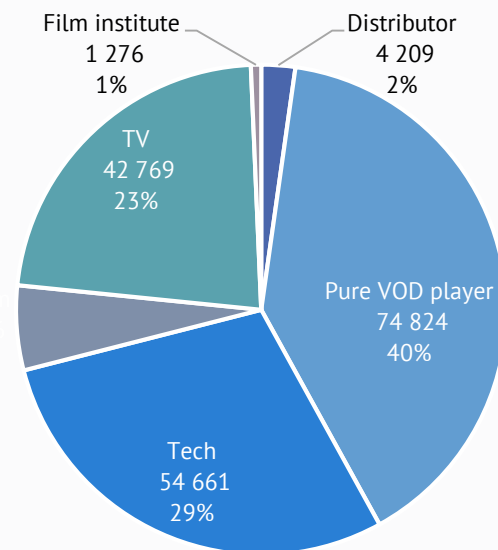
- ▶ On TVOD, tech players have the largest number of TV titles and film titles in their catalogues
- ▶ On SVOD, tech and pure VOD players offer the largest amount of film and TV titles
- ▶ For both business models, over 70% of the works available are offered by tech and pure VOD players

TVOD – Films and TV titles in catalogues



Core business	Number of TVOD catalogues	Average number of film and TV titles
Distributor	16	1 800
Pure VOD player	46	1 226
Tech	106	4 126
Telecom	13	2 121
TV	18	2 647

SVOD – Films and TV titles in catalogues



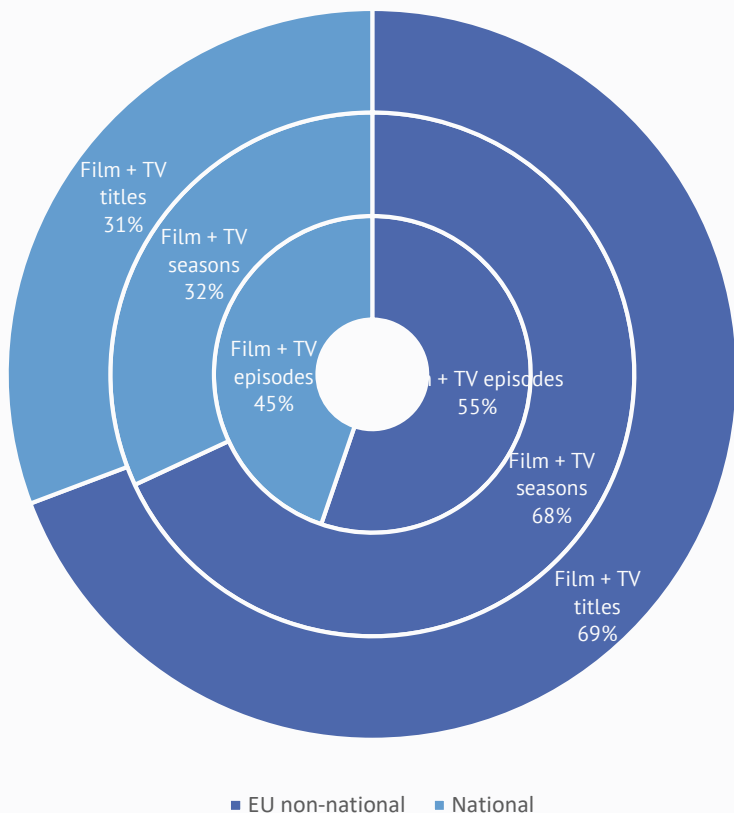
Core business	Number of SVOD catalogues	Average number of film and TV titles
Distributor	26	162
Pure VOD player	74	1 011
Tech	42	1 301
Telecom	21	500
TV	90	475
Film institute	1	1 276

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

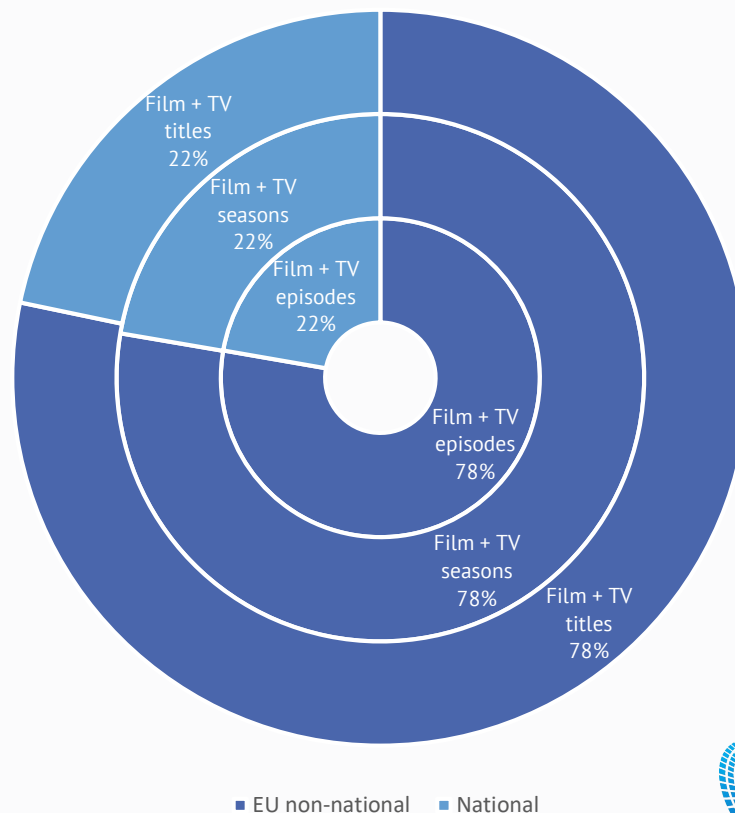
Share of EU non-national and national Films and TV content in catalogues

- ▶ EU non-national film and TV content represents the largest share of EU content, both on SVOD and TVOD
- ▶ TVOD had a higher share of national film and TV content than SVOD services

Share of EU non-national and national contents on TVOD



Share of EU non-national and national contents on SVOD

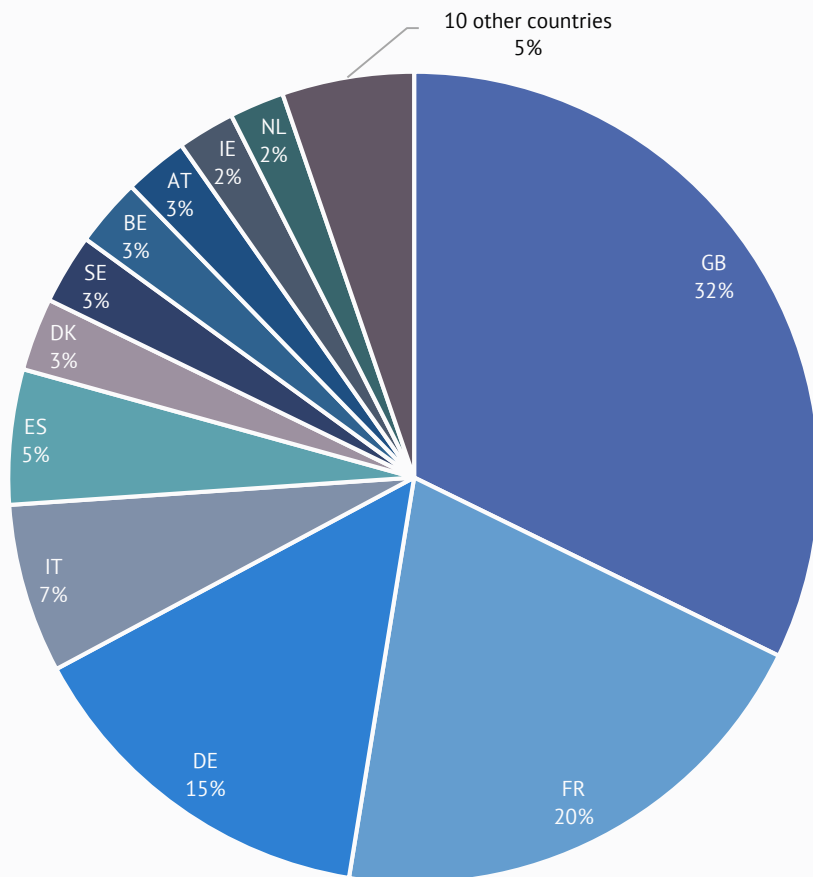


Source: JustWatch, Ampere, Filmtoro, La Pantalla Digital, EUROVOD catalogue data

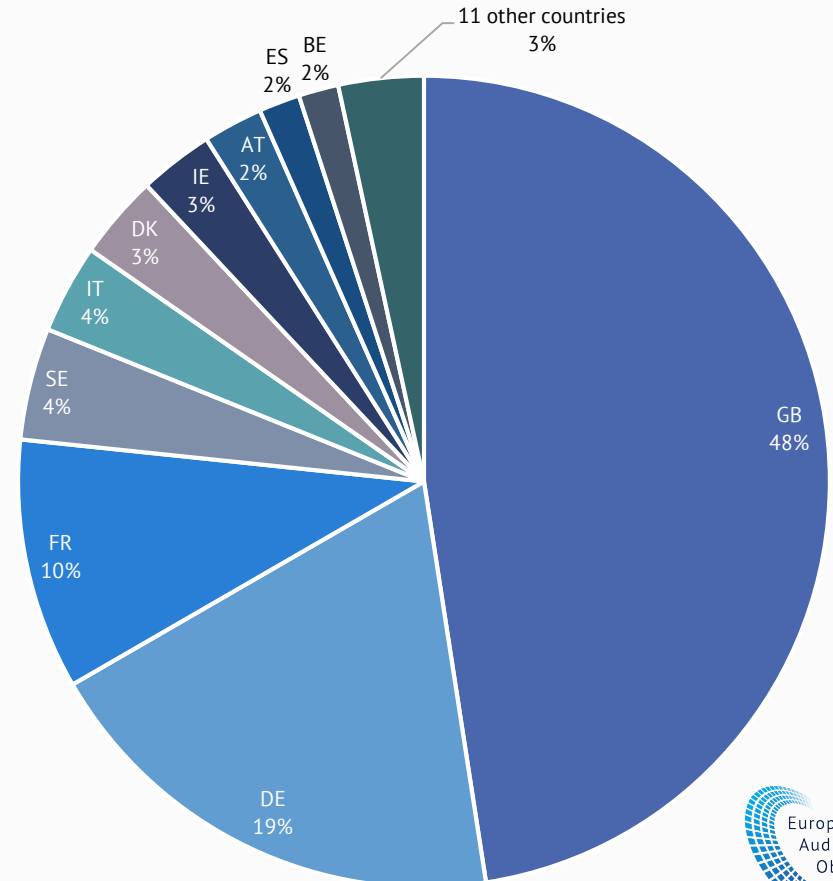
Export of EU non-national Film and TV titles on TVOD

- ▶ On TVOD, British film and TV titles are the most exported titles of EU titles, followed by French film titles and German TV titles
- ▶ While EU-5 are the top exporting countries for film, this is not true for TV content
- ▶ While Spanish titles represent 5% of all EU film exports, they only represent 2% of TV titles exports

Origin of EU non-national film titles on TVOD



Origin of EU non-national TV titles on TVOD

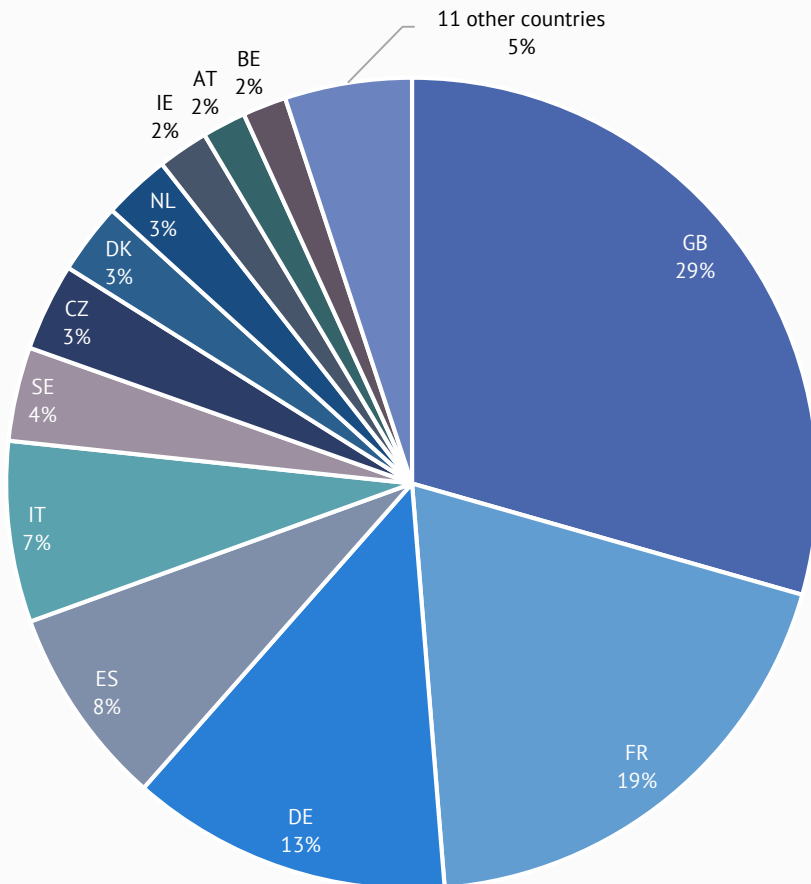


Source: JustWatch, Ampere, Filmtoro, La Pantalla Digital, EUROVOD catalogue data

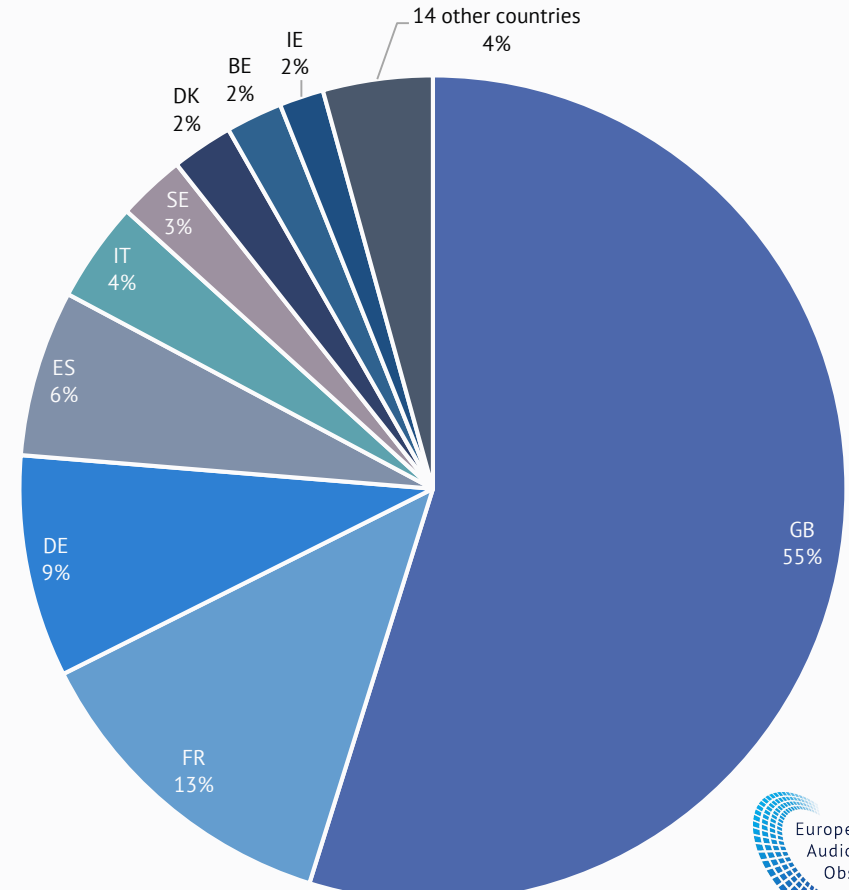
Export of EU non-national Film and TV titles on SVOD

- ▶ On SVOD, British film and TV titles account also for the lion share of EU exports with over 50% of all TV titles which were exported
- ▶ EU-5 countries complete the top 5 export countries, both for film and TV titles on SVOD
- ▶ Spanish TV titles had a higher share of TV titles exports on SVOD with 6% of all EU TV titles exports

Origin of EU non-national film titles on SVOD



Origin of EU non-national TV titles on SVOD



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

Films in VOD catalogues in the EU
Overview of
146 TVOD catalogues
and
136 SVOD catalogues

B.1 – Size of film catalogues

TVOD services are more focused on films than SVOD services

- ▶ On average, a higher number of films and higher median films in catalogues for TVOD services

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

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

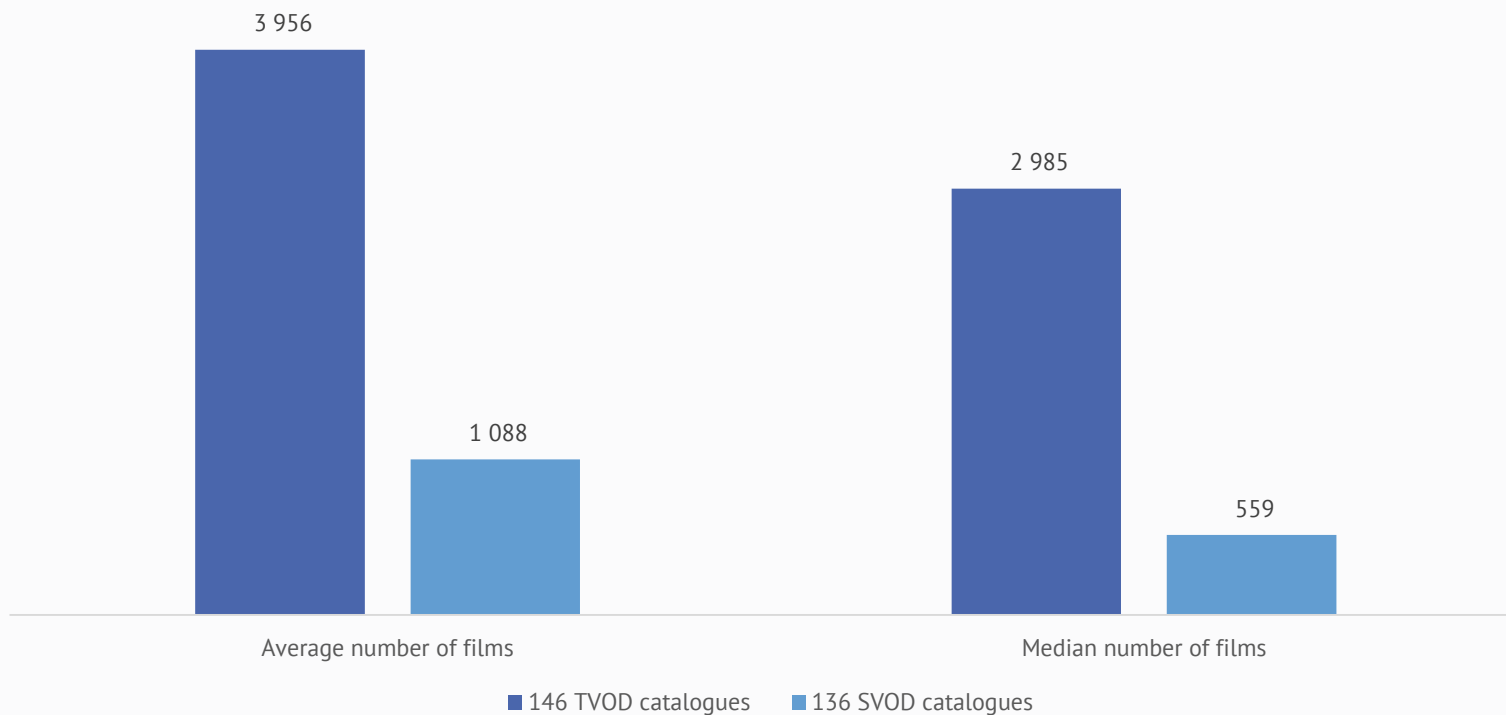
Huge variances in sizes of catalogues reflect different approaches – curation versus large choice

- ▶ While multi-country TVOD services seem to focus on offering a large choice to their customers, several national TVOD and SVOD services have more a logic of curation

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

- ▶ The median TVOD catalogue has more than 5 times as many films than the median SVOD catalogue
- ▶ On average, TVOD catalogues have more than 3 times as many films than SVOD catalogues
- ▶ TVOD services are more film-focused whereas SVOD services rely more heavily on TV content

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

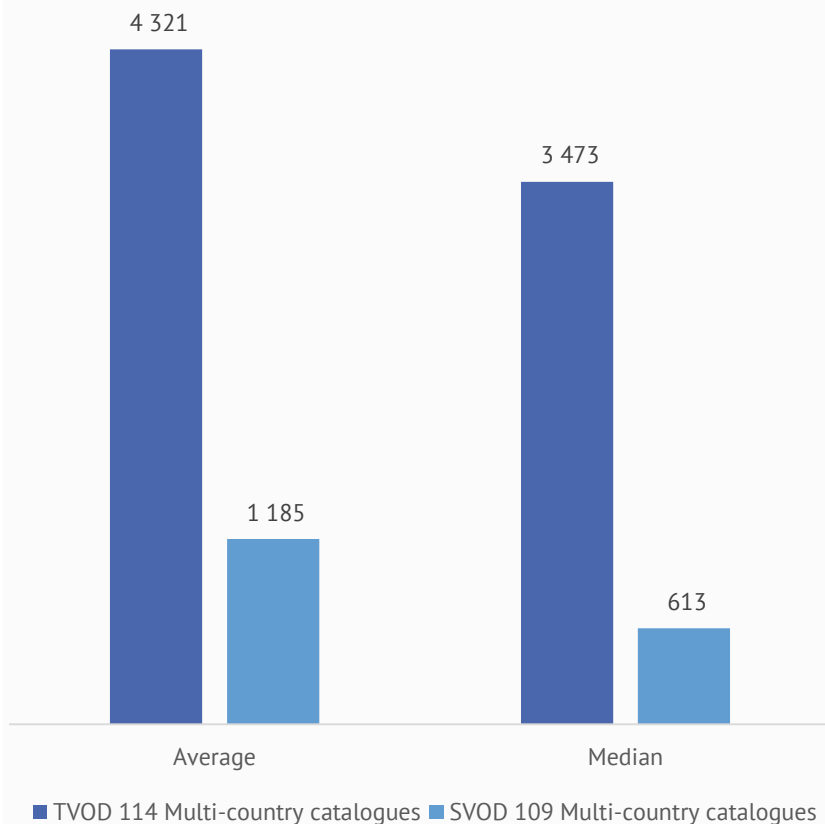


Source: JustWatch, Ampere, Filmtoro, La Pantalla Digital, EUROVOD catalogue data

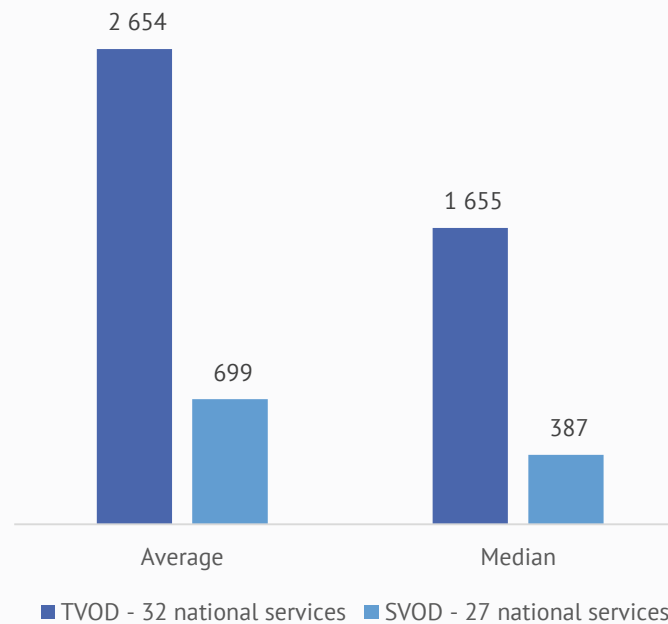
Also strong differences between national and multi-country services

- ▶ Be it on TVOD or SVOD, **multi-country catalogues have a larger number of films than national services**, with an average difference of 1 667 films for TVOD services and 486 films for SVOD services

Size of multi-country film catalogues, in number of films



Size of national film catalogues, in number of films

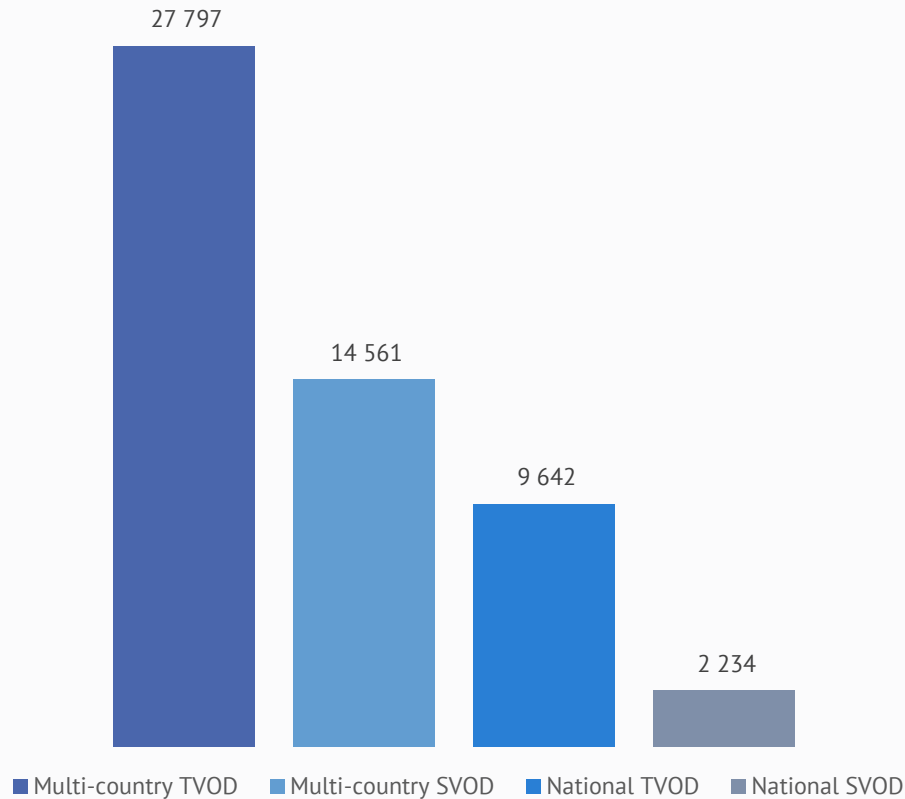


Source: JustWatch, Ampere, Filmtoro, La Pantalla Digital, EUROVOD catalogue data

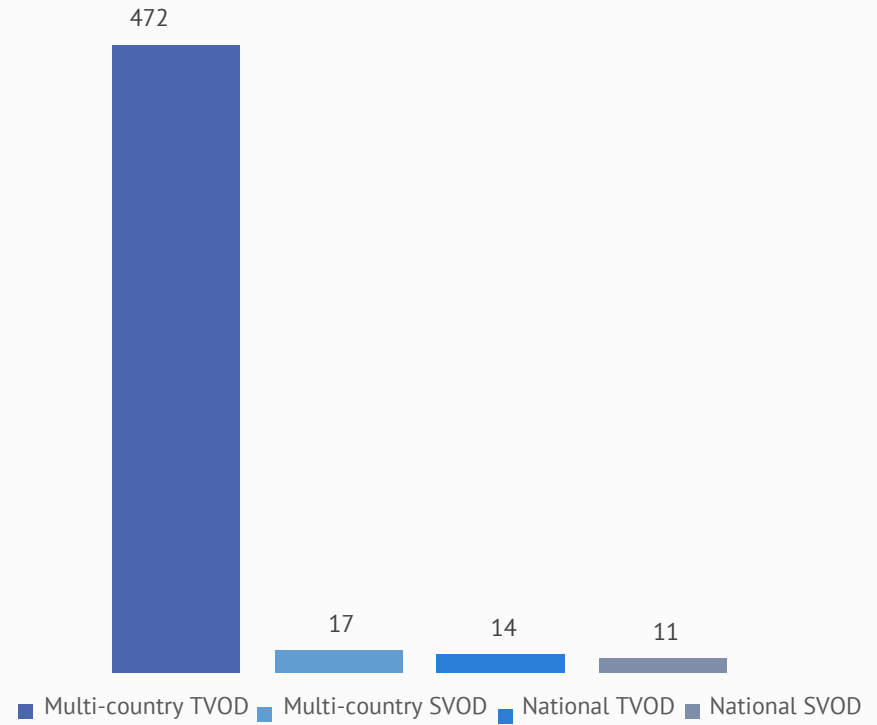
And huge disparities in the number of films for TVOD and SVOD services

- ▶ The maximum and minimum number of films show that **multi-country TVOD services are more focused on films** than other service types, for which some seem more focused on curation.

Maximum number of films in catalogue by business model



Minimum number of films in catalogue by business model



B.2 – Unique film titles available in VOD catalogues

On TVOD and SVOD combined, over 68 500 unique film titles were available

- ▶ EU unique film titles represented 40% of all unique film titles with 23 704 titles
- ▶ US film titles were the most represented with 24 834 titles or 41% of overall unique 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 36 700 titles

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

- ▶ With 40% of all unique titles being of EU origin, representing 23 704 unique film titles, TVOD services offered a larger choice than SVOD services' 12 763 unique EU film titles or 35% of all film titles available on SVOD

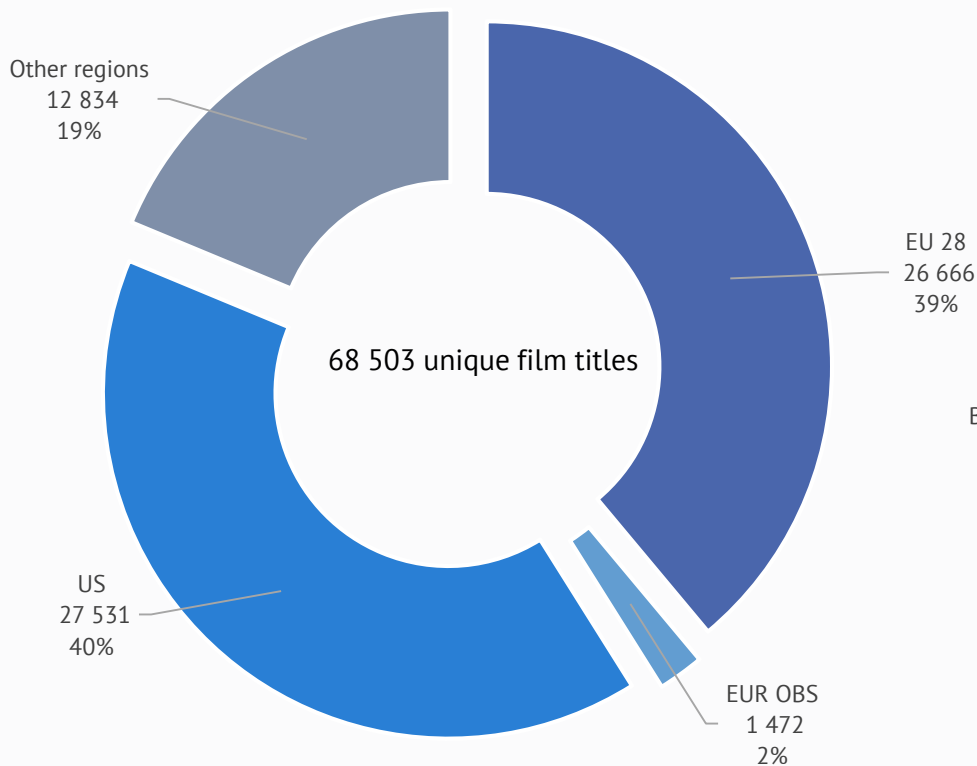
More British unique film titles on SVOD, more French titles on TVOD

- ▶ With 24% of all EU titles, British film titles were the most offered EU titles on SVOD with French titles making up 16% and German titles 13%
- ▶ On TVOD, French titles represented 23% of all EU titles, British titles 19% and German titles 14%
- ▶ On both types of services, Spanish titles represented 6% and the least found titles from other 18 EU countries 10% of all EU titles.

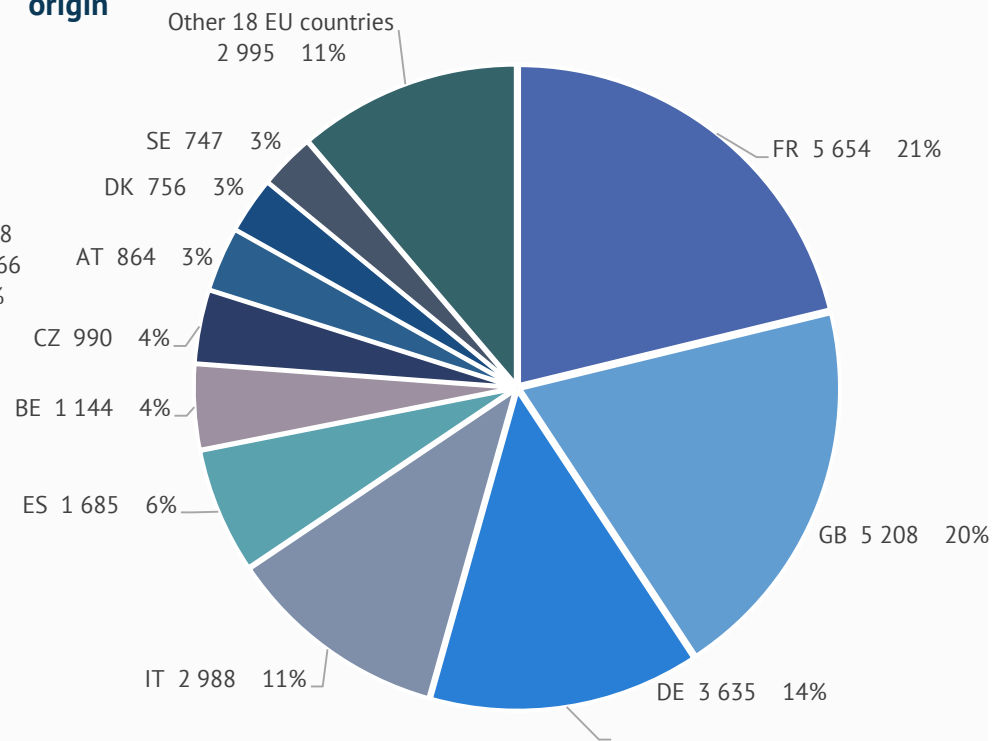
Total number of unique film titles available in VOD catalogues

- ▶ On a whole, over **68 503 unique film titles** were available to customers on both types of services
- ▶ **39%** of all unique film titles were of EU origin and 40% of US origin
- ▶ For EU films, **French and British titles represented 41% of all unique EU films titles**, and **EU-5 titles 72%** of all EU unique film titles

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



Origin of unique EU film titles in VOD catalogues by country of origin

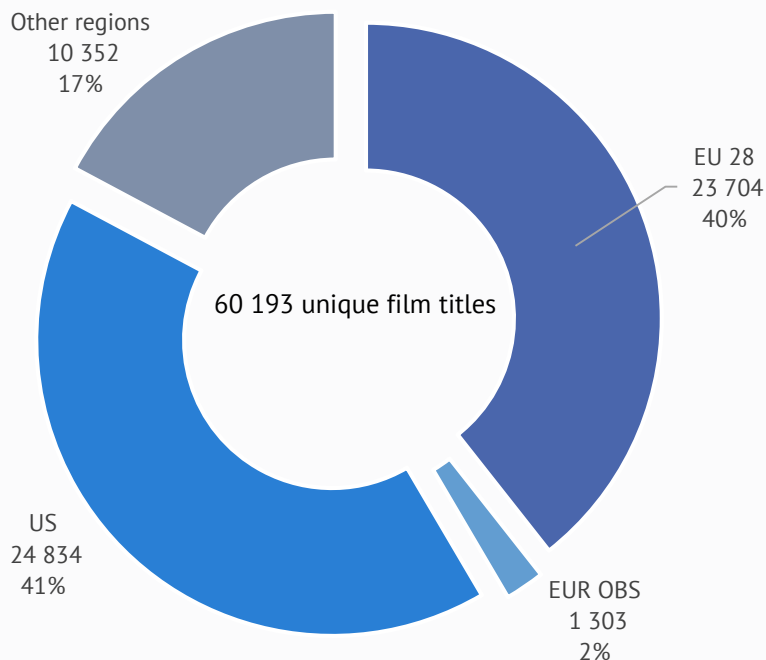


7 760 film titles could not be identified and have been excluded from the analysis. They represent 10% of all collected film titles.

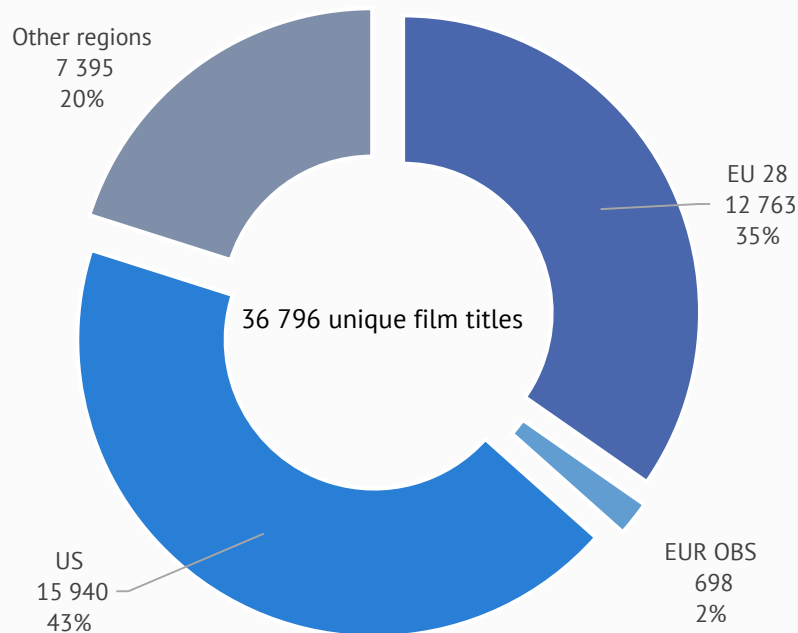
A larger choice of unique titles on TVOD

- ▶ TVOD services offer the highest number of total unique films titles, with over 60 000 titles available
- ▶ On TVOD services, EU unique film titles represented 40% of all unique titles, on SVOD 35%
- ▶ On both type of services, US titles made up more than 40% of all unique films titles

Origin of unique film titles in TVOD catalogues



Origin of unique film titles in SVOD catalogues



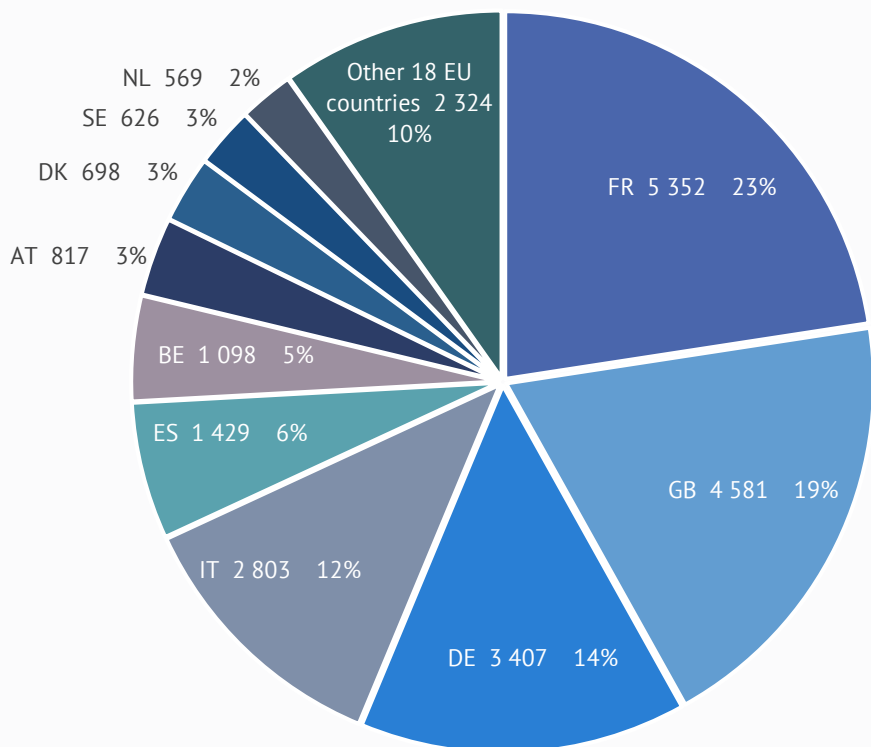
Source: JustWatch, Ampere, Filmtoro, La Pantalla Digital, EUROVOD catalogue data

On TVOD, 4 894 film titles have not been identified (7,5% of all film titles), on SVOD the number of unidentified titles was 3 119 or 7,8% of all titles. They have been excluded for the analysis.

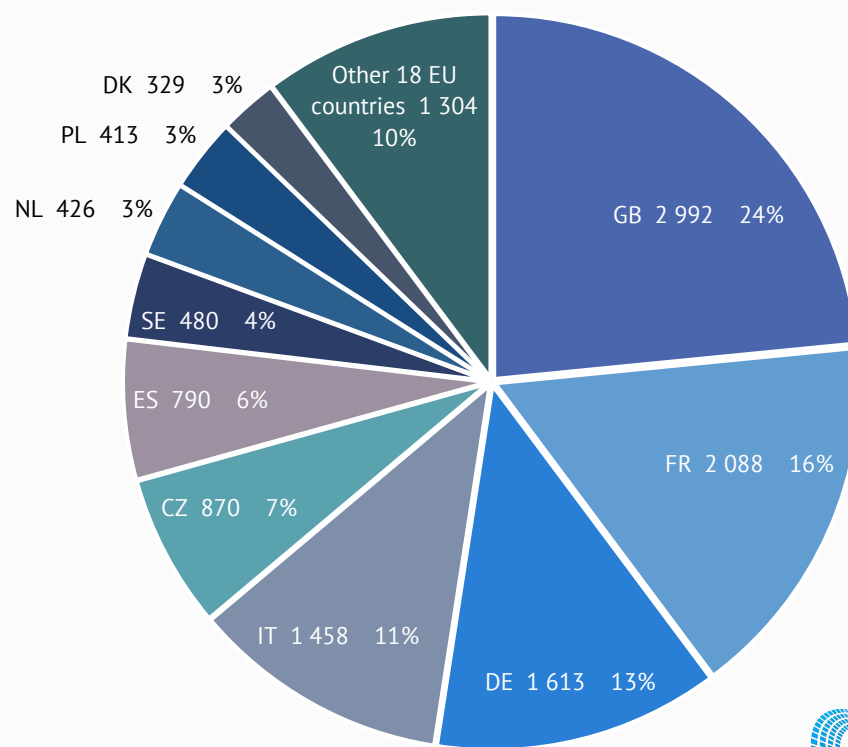
Differences in the origin of EU titles by business model

- ▶ While on TVOD, French titles were the most represented with 23% of EU titles, on SVOD this was the case for British titles with 24% which travelled better in multi-country catalogues
- ▶ For the other EU-5 countries, the percentages were almost identical on TVOD and SVOD
- ▶ Nordic films from SE and DK made up 6% on TVOD and 7% on SVOD
- ▶ For both type of services, the rest of 18 EU countries represented 10% of all unique EU titles.

Origin of unique EU film titles in TVOD catalogues



Origin of unique EU film titles in SVOD catalogues



B.3 – Origin and circulation of films

30% if all films found on TVOD are of EU origin, 26% on SVOD

- ▶ US titles made up 55% of films on TVOD and 49% on SVOD
- ▶ Films from other regions had a much larger share on SVOD with 23% than on TVOD with 13%

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

- ▶ In the 32 national TVOD catalogues, EU films represented 50% of all films, on national SVOD services their share was 52%
- ▶ US films on national services represented less than 40% of all films and films from other regions 11% for both type of services

EU films on multi-country services made up 27% of all films on TVOD and 23% on SVOD

- ▶ US films accounted for the lion share with 53% on multi-country TVOD services and 51% on SVOD
- ▶ Films of other regions accounted for 13% on TVOD and 24% on SVOD

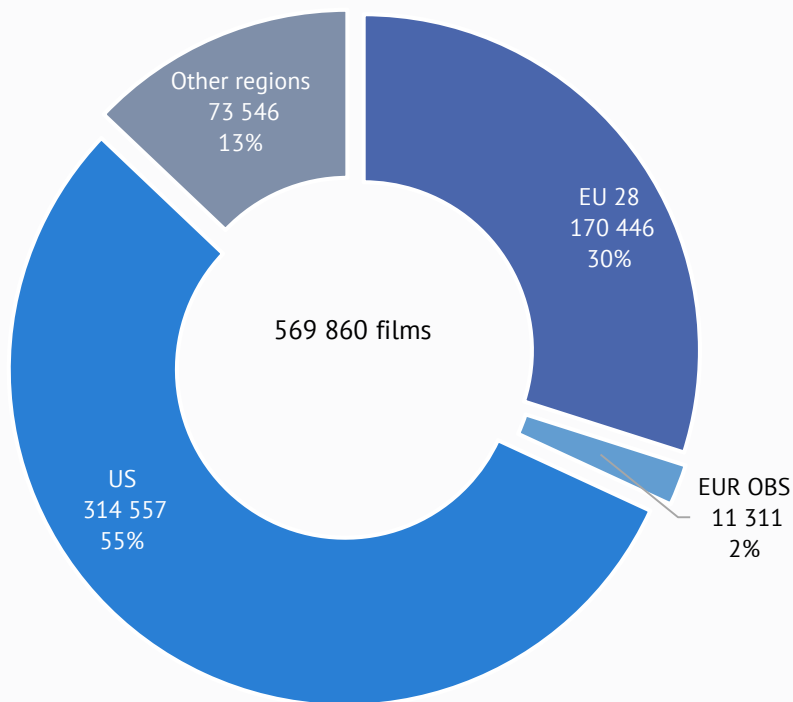
On average, an EU film title was available in in 3,2 countries on TVOD and 2,6 countries on SVOD

- ▶ This circulation compares to 5,3 countries for US titles on TVOD and 3,8 countries on SVOD
- ▶ On services, the circulation of EU titles was 7,1 TVOD services on average and 2,9 SVOD services on average compared to 12,5 TVOD services and 4,3 SVOD services for US titles

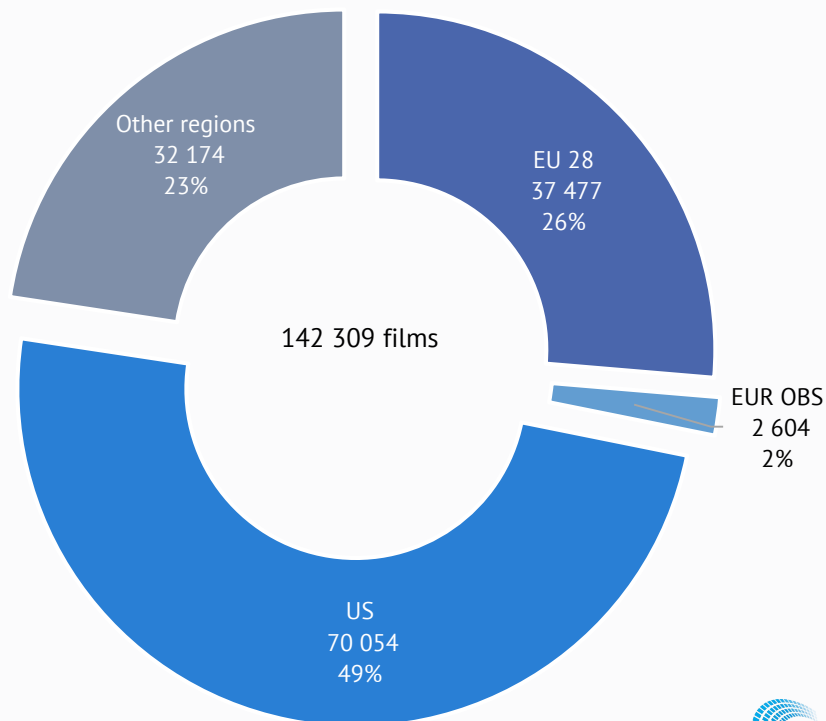
30% of all films on TVOD and 26% on SVOD are of EU origin

- ▶ In terms of availability, EU films represented 30% in all TVOD catalogues and 26% in SVOD catalogues
- ▶ US films had a higher share in TVOD catalogues with 55% of all films and 49% in SVOD catalogues
- ▶ Films of other regions were better represented in SVOD catalogues with 23% compared to 13% in TVOD catalogues

Origin of films in 146 TVOD catalogues



Origin of films in 136 SVOD catalogues



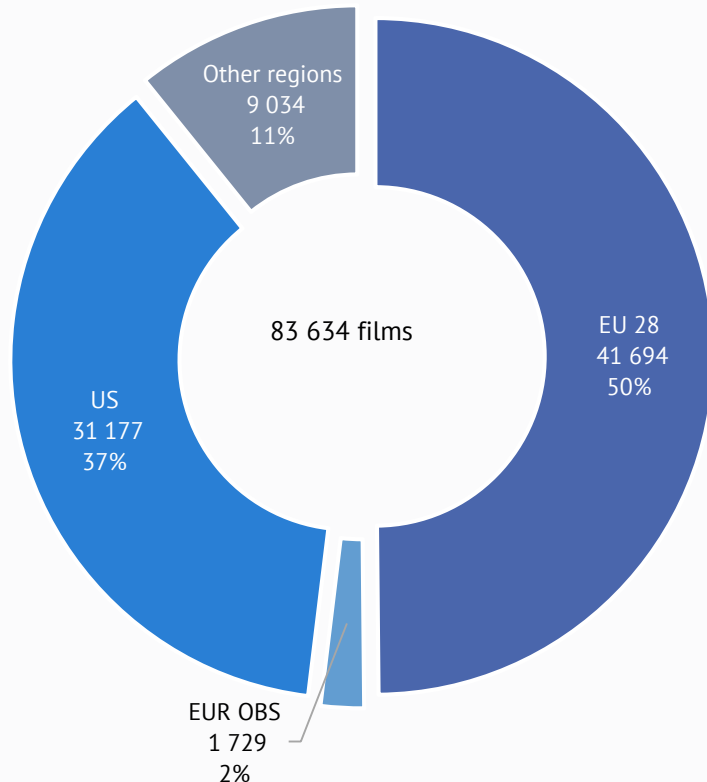
Source: JustWatch, Ampere, Filmtoro, La Pantalla Digital, EUROVOD catalogue data

On TVOD, 7 664 films have not been identified (1,8% of all films), on SVOD the number of unidentified films was 6 680 or 3,8% of all films. They have been excluded for the analysis.

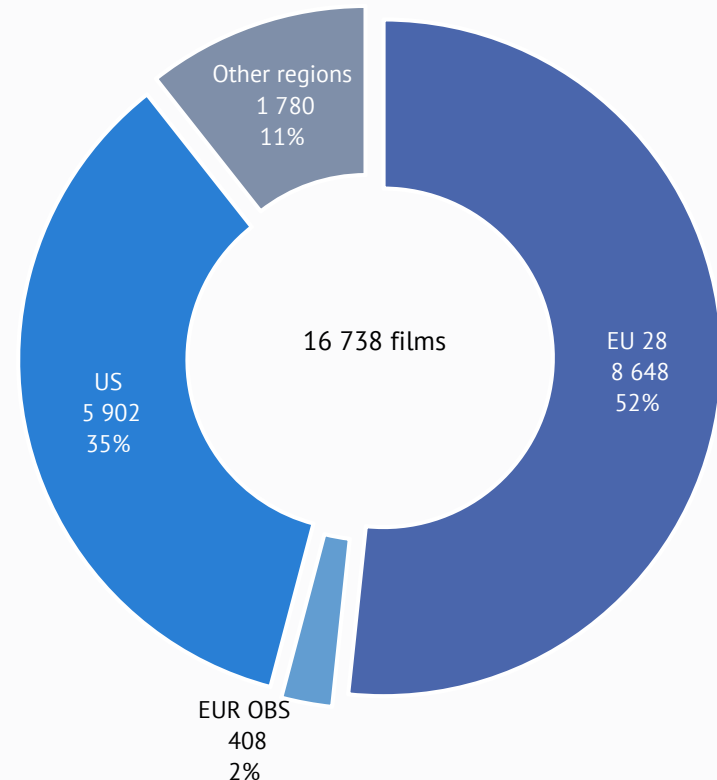
National services are more EU film centric...

- ▶ National services, be it TVOD or SVOD services, had a high share of EU films with 50% and 52% of all films and an almost equal share of US films with respectively 37% and 35%.
- ▶ Both types of national services had also the same share of films of other regions with 11% and of EUR OBS countries with 2%.

Origin of films in 32 national TVOD catalogues



Origin of films in 27 national SVOD catalogues

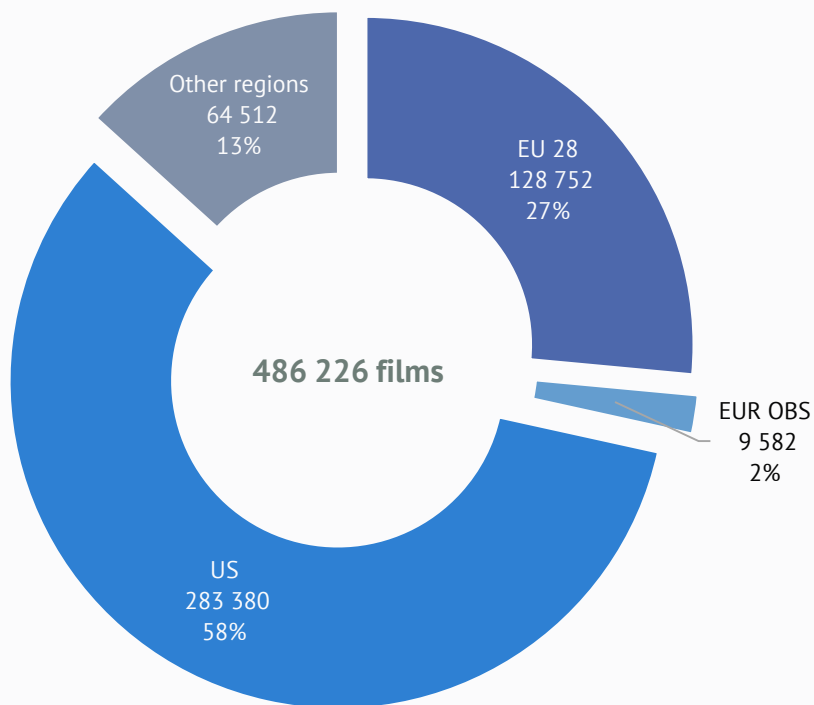


Source: JustWatch, Ampere, Filmtoro, La Pantalla Digital, EUROVOD catalogue data

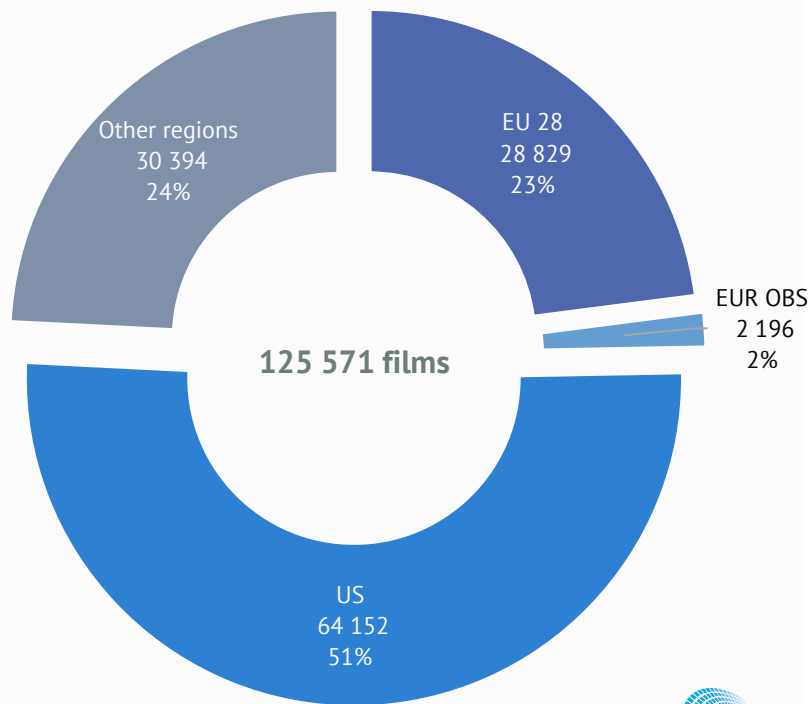
While multi-country services rely more on US films

- ▶ Multi-country services, both for TVOD and SVOD, had a share of US films above 50%
- ▶ EU films on the other hand represented 27% of all films on TVOD and 23% on SVOD
- ▶ SVOD catalogues had a relatively high share of films of other regions with 24%, compared to TVOD's 13%

Origin of films in 114 multi-country TVOD catalogues



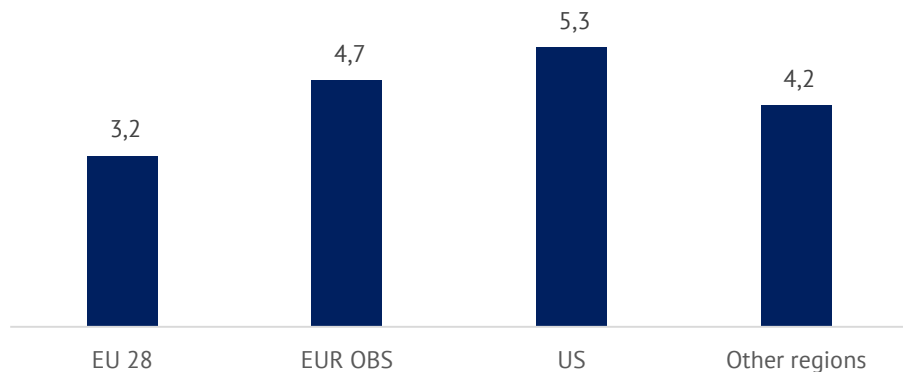
Origin of films in 109 multi-country SVOD catalogues



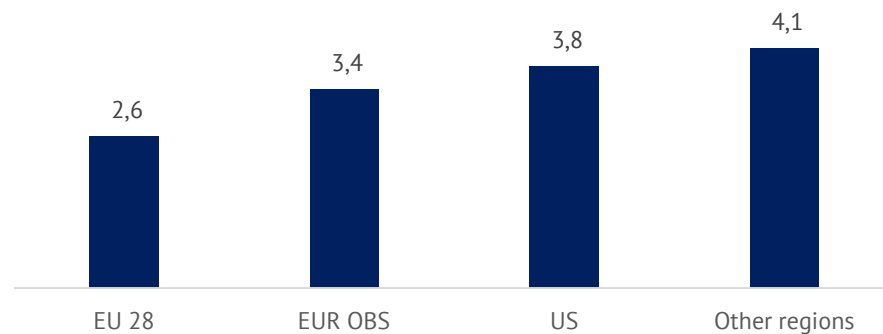
Lower percentages of EU films is explained by circulation – in 28 EU countries

- ▶ The lower share of EU films in total compared to their share of unique films (30% of all films on TVOD compared to 40% of all titles; 26% of all films on SVOD compared to 35% of all titles) is explained by their lower circulation in countries, with an average of 3,2 countries on TVOD and 2,6 on SVOD
- ▶ US and films of other regions travel the best, crossing borders more easily than EU films

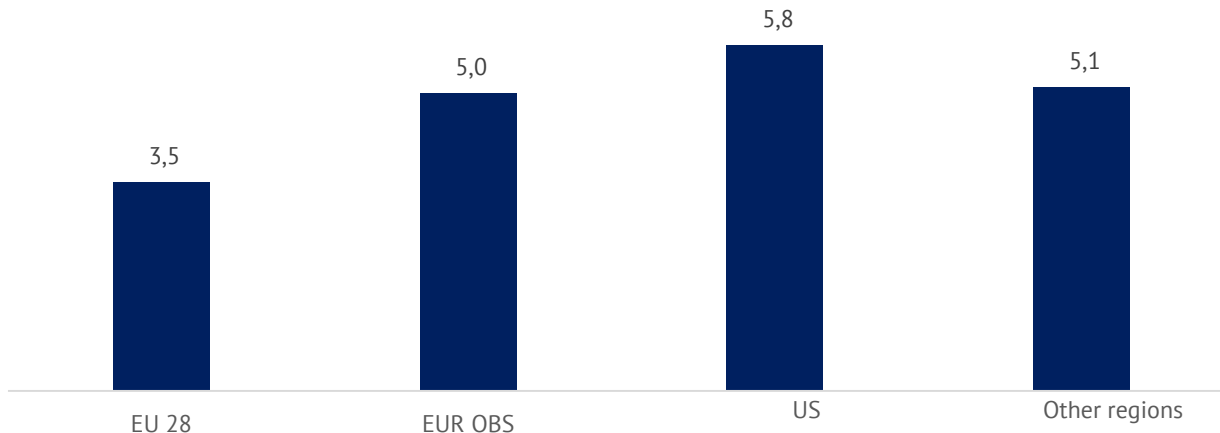
TVOD – Average circulation of titles in countries by region of origin



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



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

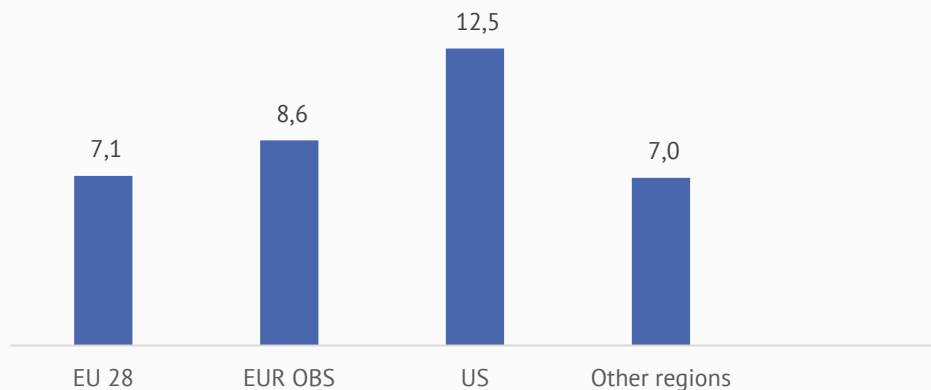


Source: JustWatch, Ampere, Filmtoro, La Pantalla Digital, EUROVOD catalogue data

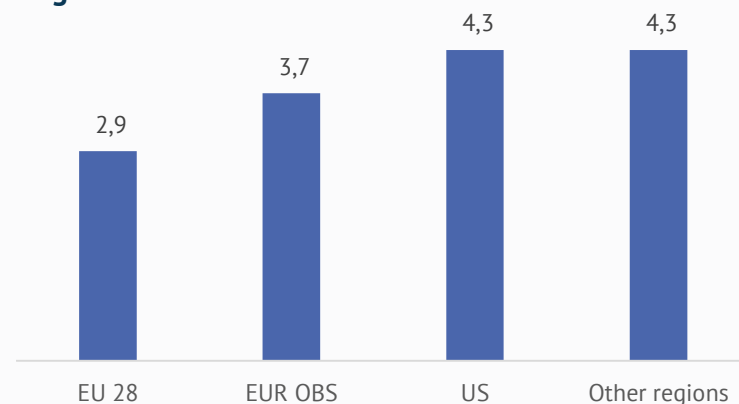
And this also true when looking at services circulation for EU films

- ▶ On average, EU films are present in 7,1 TVOD catalogues and 2,9 SVOD catalogues, less than films of all other regions
- ▶ US films circulated the best also on services

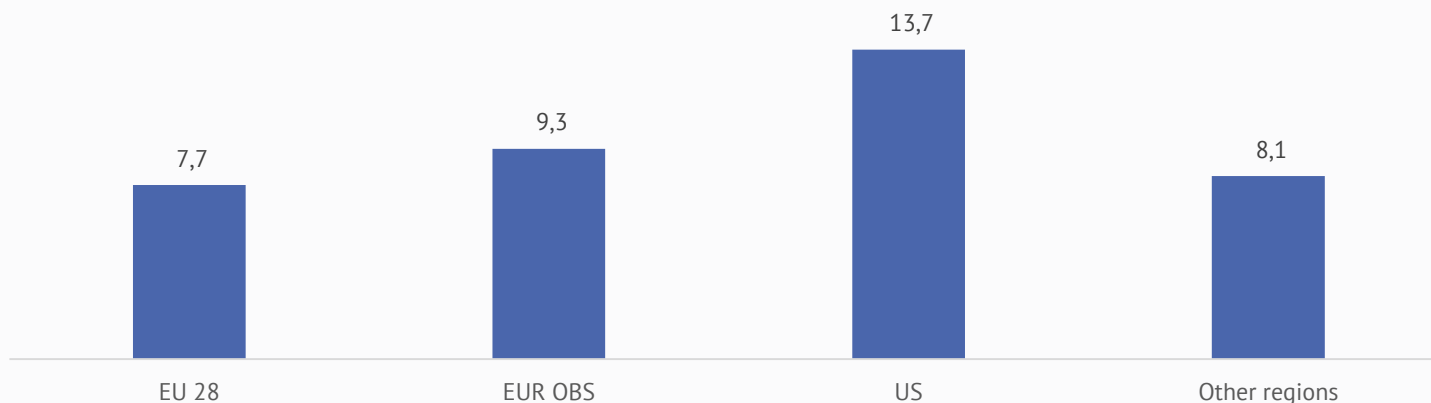
TVOD – Average circulation of titles on services by region of origin



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, Ampere, Filmtoro, La Pantalla Digital, EUROVOD catalogue data

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

Services owned by tech and pure VOD players have the highest number of films in their catalogues

- ▶ 73% of all films found on TVOD are on services owned by tech companies (Apple, Microsoft) and 67% of all films found on SVOD are on services owned by pure VOD players (Netflix) and tech players (Amazon)

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

- ▶ On TVOD and SVOD, business owned by telecom players and film distributors have the largest share of EU films in their catalogues, while the lowest share is found in the catalogues of tech and pure VOD players

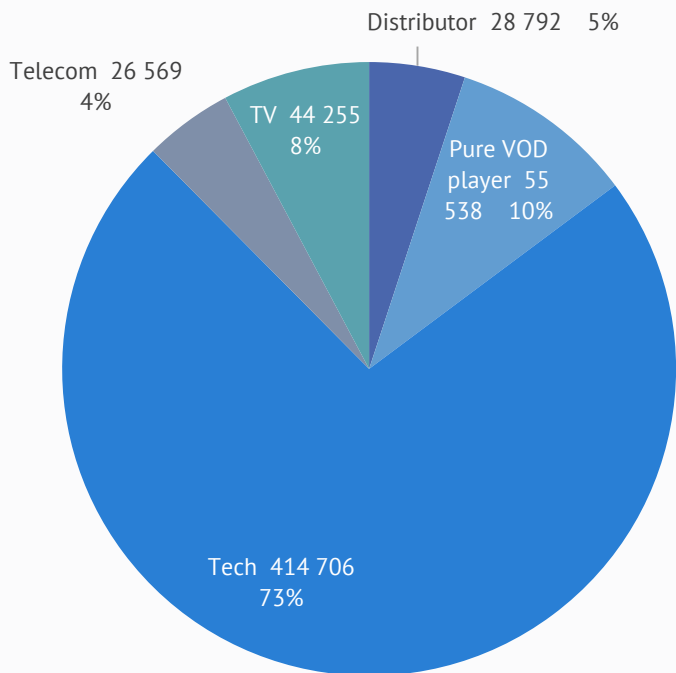
Services owned by EU players have the highest share of EU films while services owned by global players offer the largest number of films

- ▶ With almost 3 times more films, global players have a larger film offering than EU players
- ▶ Therefore, in absolute numbers, more EU films are available on services owned by global players than EU players

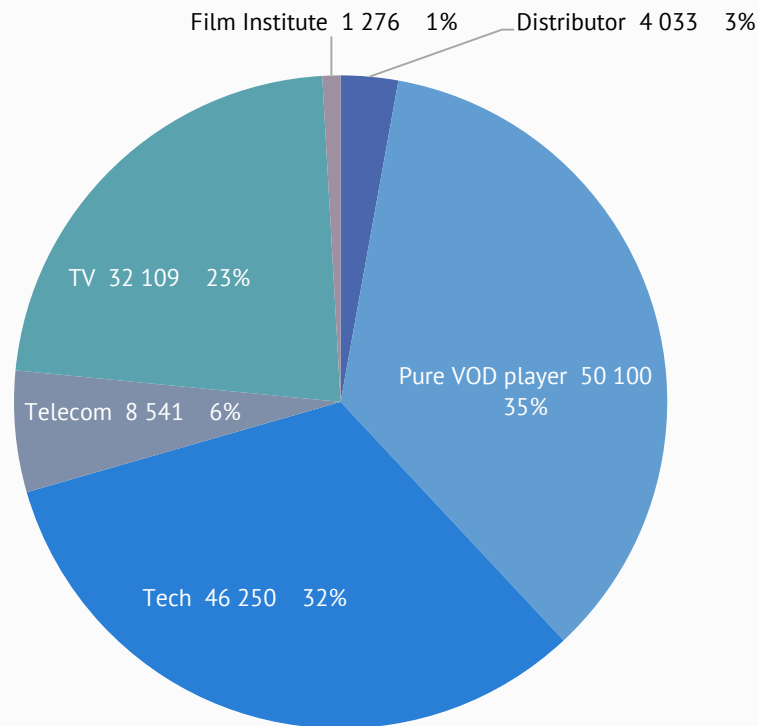
Services owned by tech players have the highest number of films in their catalogues

▶ Tech and pure VOD players such as Netflix have 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



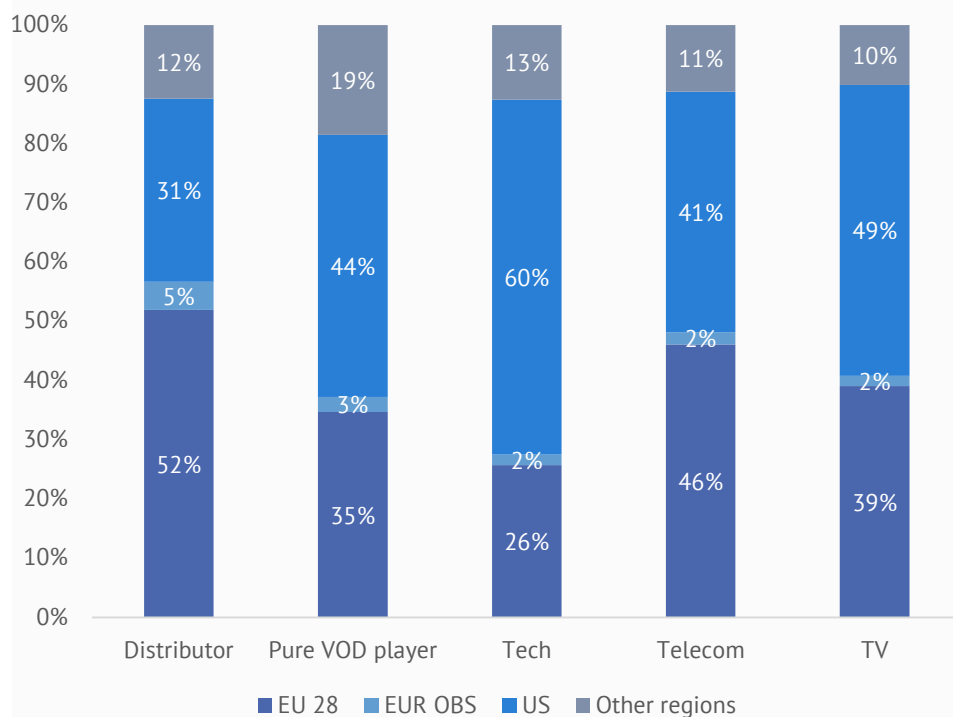
Core business	Number of TVOD catalogues	Average number of films/catalogue	Number of SVOD catalogues	Average number of films/catalogue
Distributor	16	1 800	24	168
Film Institute	0		1	1 276
Pure VOD player	39	1 424	42	1 193
Tech	73	10 633	18	2 569
Telecom	7	3 796	11	776
TV	11	6 322	40	803

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

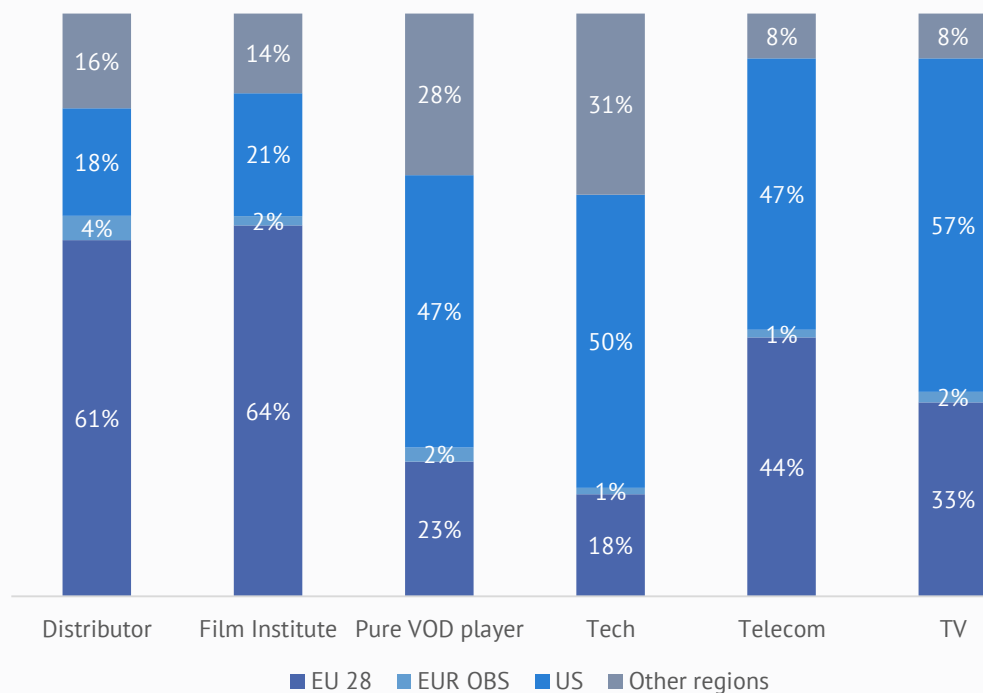
Sharp differences in the composition of catalogues by core business of service owners

- ▶ Services owned by film distributors and telecom players had the highest share of EU films
- ▶ Tech players offered the smallest share of EU films
- ▶ The highest share of US films were found on SVOD services operated by broadcasters on SVOD and tech players on TVOD

TVOD – Share of films by core business of service owner



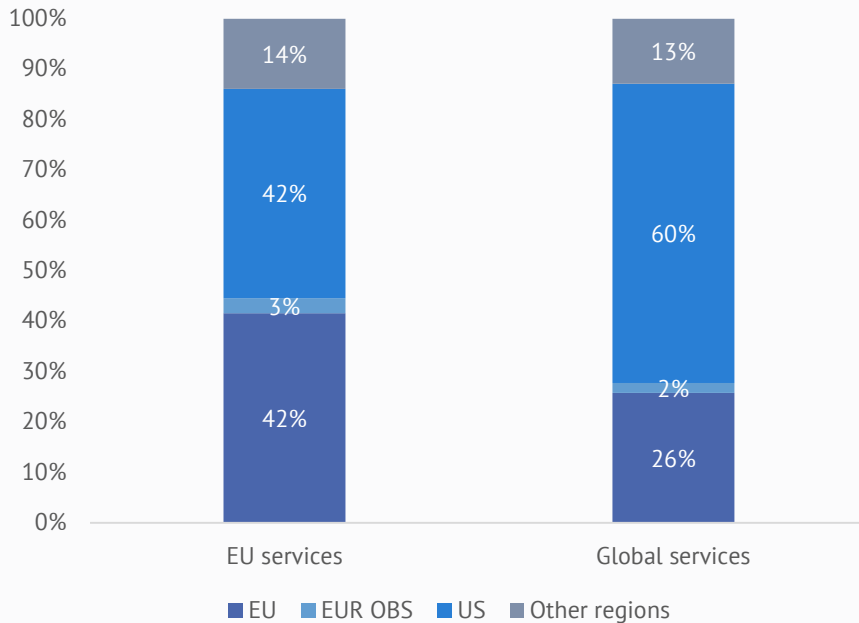
SVOD – Share of films by core business of service owner



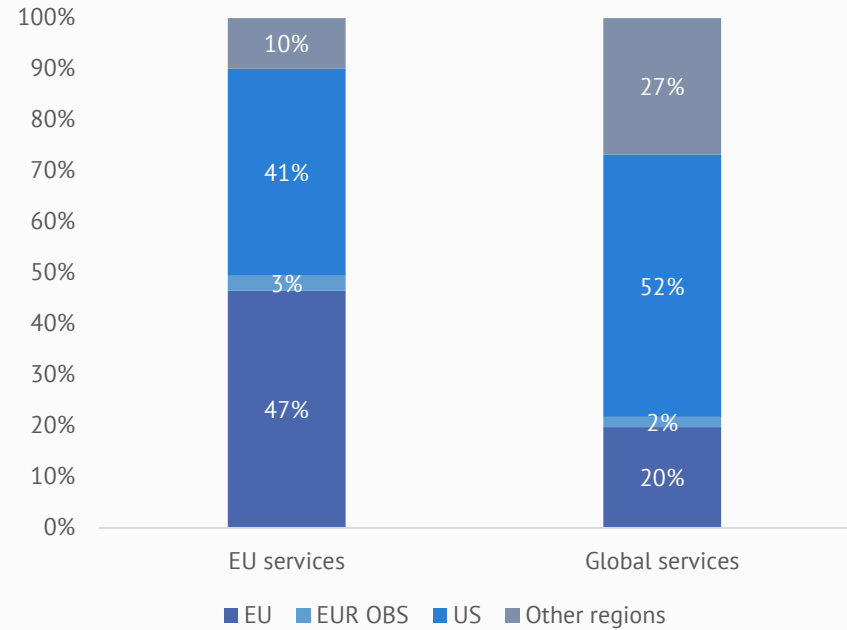
Higher share of EU films for EU owned services...

▶ The share of EU films in the catalogues of EU owned services is higher, with 42% on TVOD and 47% on SVOD while global services have a share of EU films of 26% on TVOD and 20% on SVOD

TVOD – Share of films by origin of service owner



SVOD – Share of films by origin of service owner



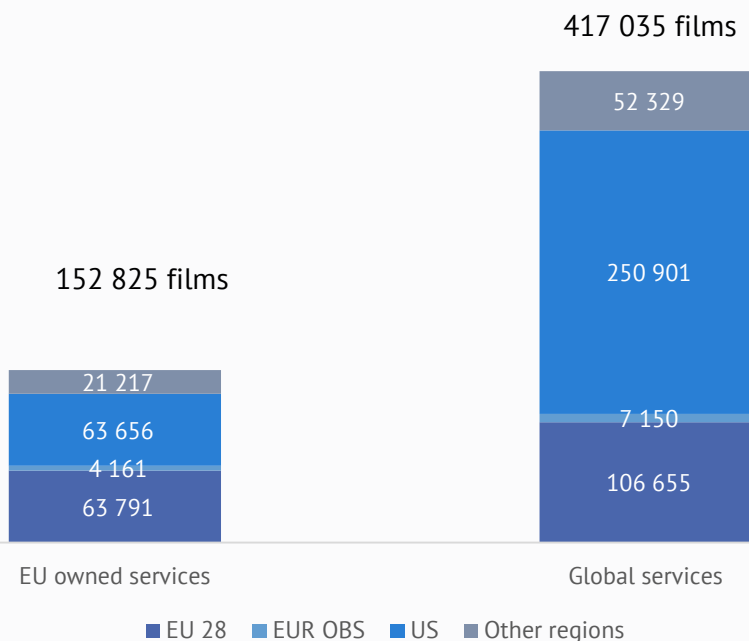
Source: JustWatch, Ampere, Filmtoro, La Pantalla Digital, EUROVOD catalogue data

Origin of service owner	Number of TVOD catalogues	Average number of films/catalogue	Number of SVOD catalogues	Average number of films/catalogue
EU	72	2 123	73	461
Global	74	5 636	63	1 725

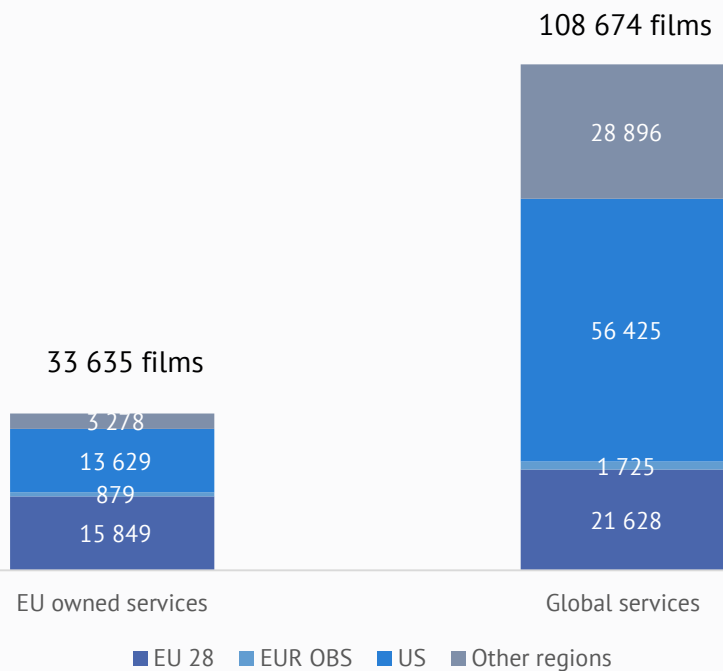
But the total offer of EU films is higher for global services

- ▶ From an absolute numbers point of view, **global services offer more films** and thus also **more EU 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 EU non-national films

On TVOD, 29% of all EU films were of national origin, 22% on SVOD services

- ▶ EU non-national are the main source of EU films for both type of services

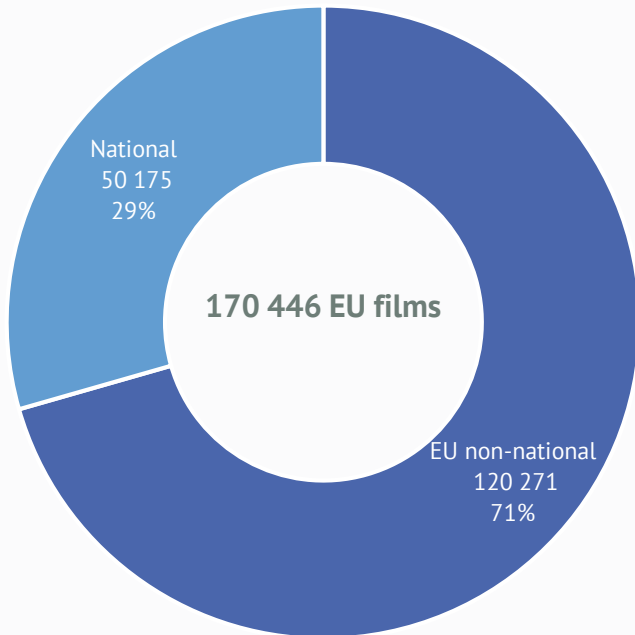
Both on TVOD and SVOD, national services had a much higher share of national films than multi-country services which relied more on EU non-national films for their EU film offering

- ▶ With a share of 39% of national films of EU films on TVOD and 38% on SVOD, national services had a higher share of national film offering
- ▶ For multi-country services, national films represented 26% of all EU films on TVOD and 17% on SVOD

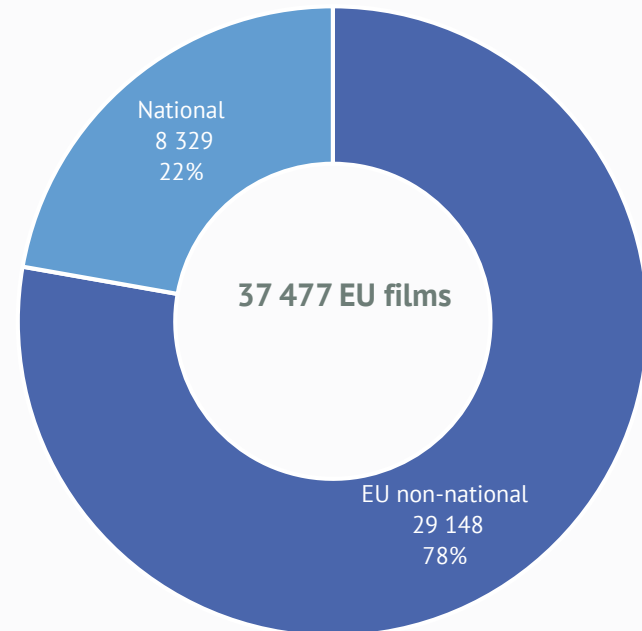
What is the split between EU non-national and national films?

- ▶ On TVOD, national films have a slightly higher share than EU non-national films compared to SVOD, as TVOD services aim is to sell films and could therefore have a higher national film offering
- ▶ For both business models, EU non-national films represent the main source for EU films with over 70% of all EU films

TVOD - Split of national and EU non-national films



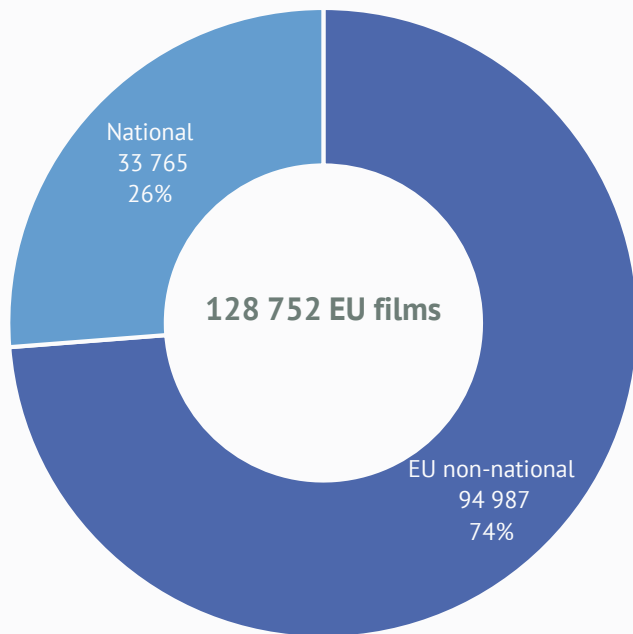
SVOD - Split of national and EU non-national films



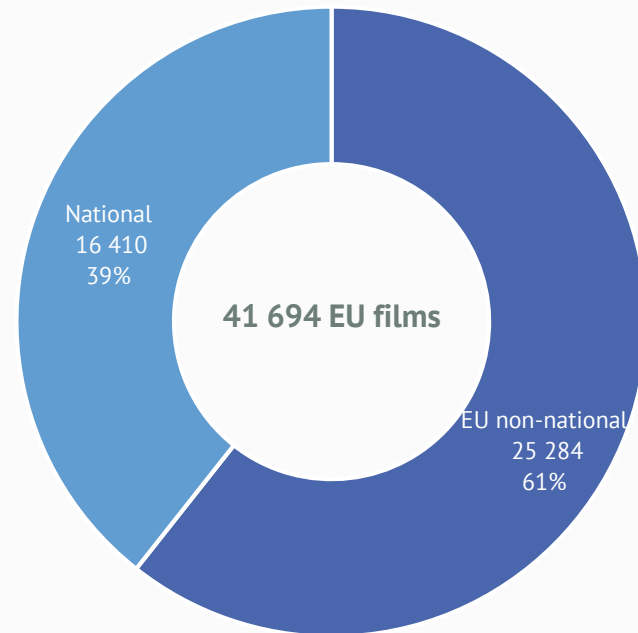
Differences between multi-country and national catalogues

- ▶ On TVOD, national services have a higher share than multi-country services of national films in their EU film offering
- ▶ On the other hand, multi-country services offered more EU films and thus also national films
- ▶ EU non-national is the main source of EU films for both national and multi-country services

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



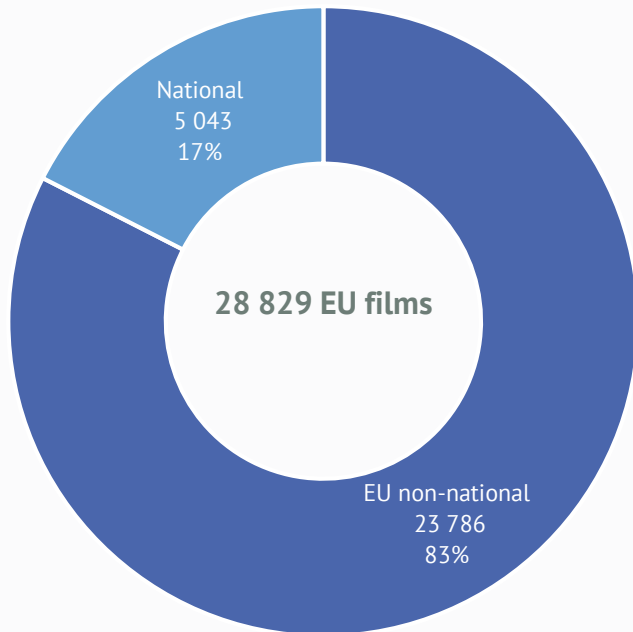
TVOD national services - Split of national and EU non-national films



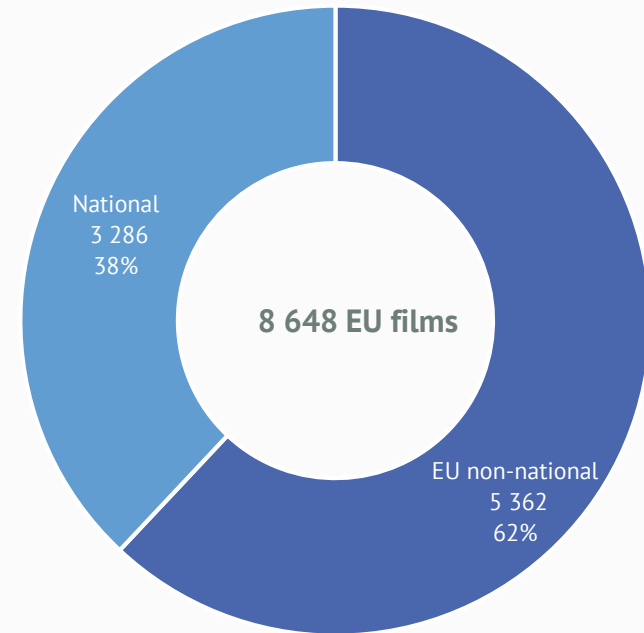
What is the split between EU non-national and national films?

- ▶ On SVOD, national services have a higher share than multi-country services of national films in their EU film offering
- ▶ As on TVOD, multi-country services offered more EU films and thus also national films
- ▶ EU non-national is the main source of EU films for both national and multi-country services also on SVOD

SVOD multi-country services - Split of national and EU non-national films



SVOD national services - Split of national and EU non-national films



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

Only EU non-national films are considered

- ▶ Export of EU films – national market does not enter into consideration

British films are the most exported films on TVOD and SVOD, making respectively up 32% and 29% of all exported EU films

- ▶ French films are ranking second with 20% of all exported films on TVOD and 19% on SVOD
- ▶ And German films were third for both business models (14% on TVOD and 13% on SVOD), and on both national and multi-country services
- ▶ EU-5 films represent 78% of all EU film exports on TVOD and 76% on SVOD

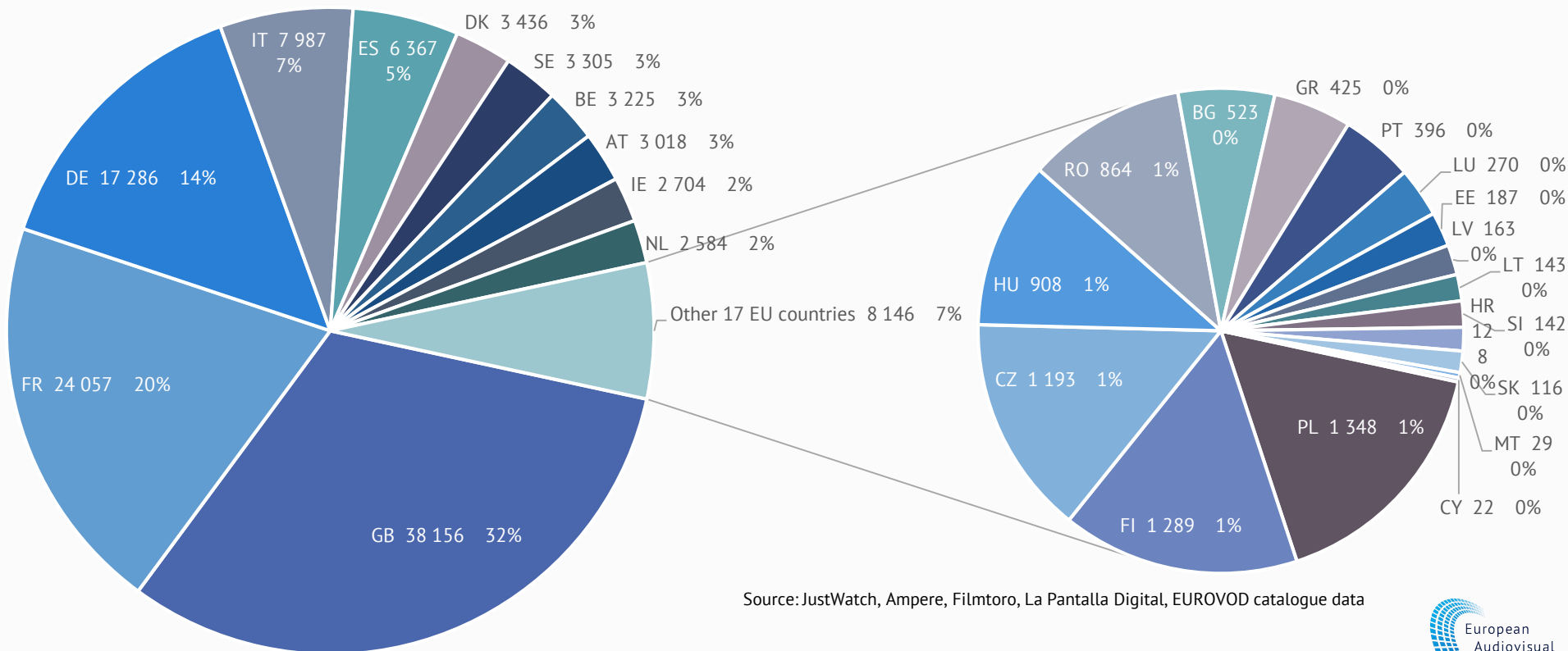
French films were the most exported films on national services, on TVOD and on SVOD

- ▶ With 24% of all exported EU films in national TVOD and SVOD catalogues, French films were the first source of imported films on national services
- ▶ In multi-country catalogues, British films were by far the main source of imported films with 34% on TVOD (and French films were second with 19%) and 33% on SVOD (and French films second with 19%)

Which EU countries export the most films on TVOD?

- ▶ British films dominate the export of EU films on TVOD services with 32%.
- ▶ Without surprise, EU-5 films take the first five places in the top exporting film producing countries
- ▶ Danish, Swedish, Belgian, Austrian and Irish films complete the top 10 export countries list

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

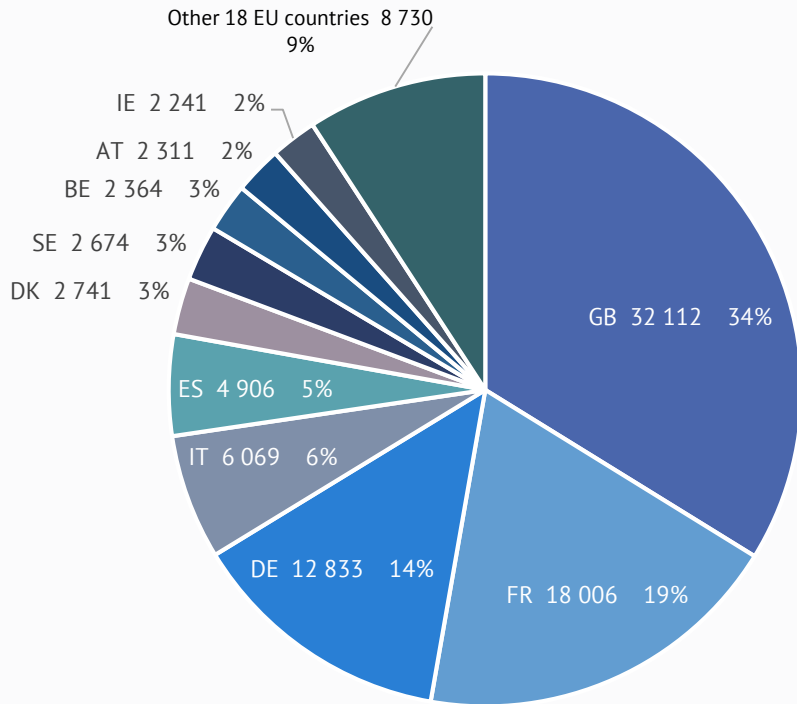


Source: JustWatch, Ampere, Filmtoro, La Pantalla Digital, EUROVOD catalogue data

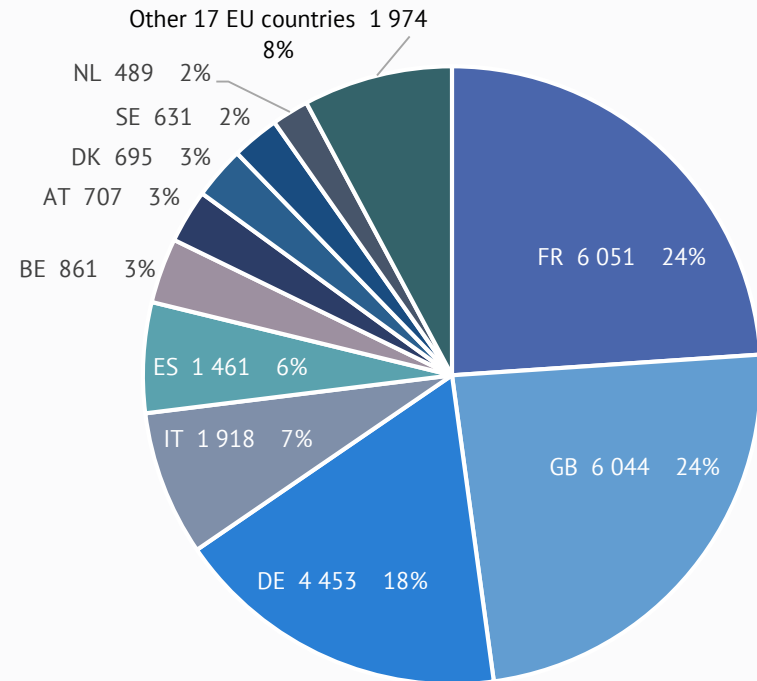
Heavy reliance on GB films by multi-country TVOD services

- ▶ While British films represent more than 1/3 of all EU exported films in multi-country TVOD catalogues, French and British films are more equally represented in national catalogues
- ▶ For films of other EU countries, the proportions are comparable when it comes to their export

Export of EU films in 114 multi-country TVOD catalogues



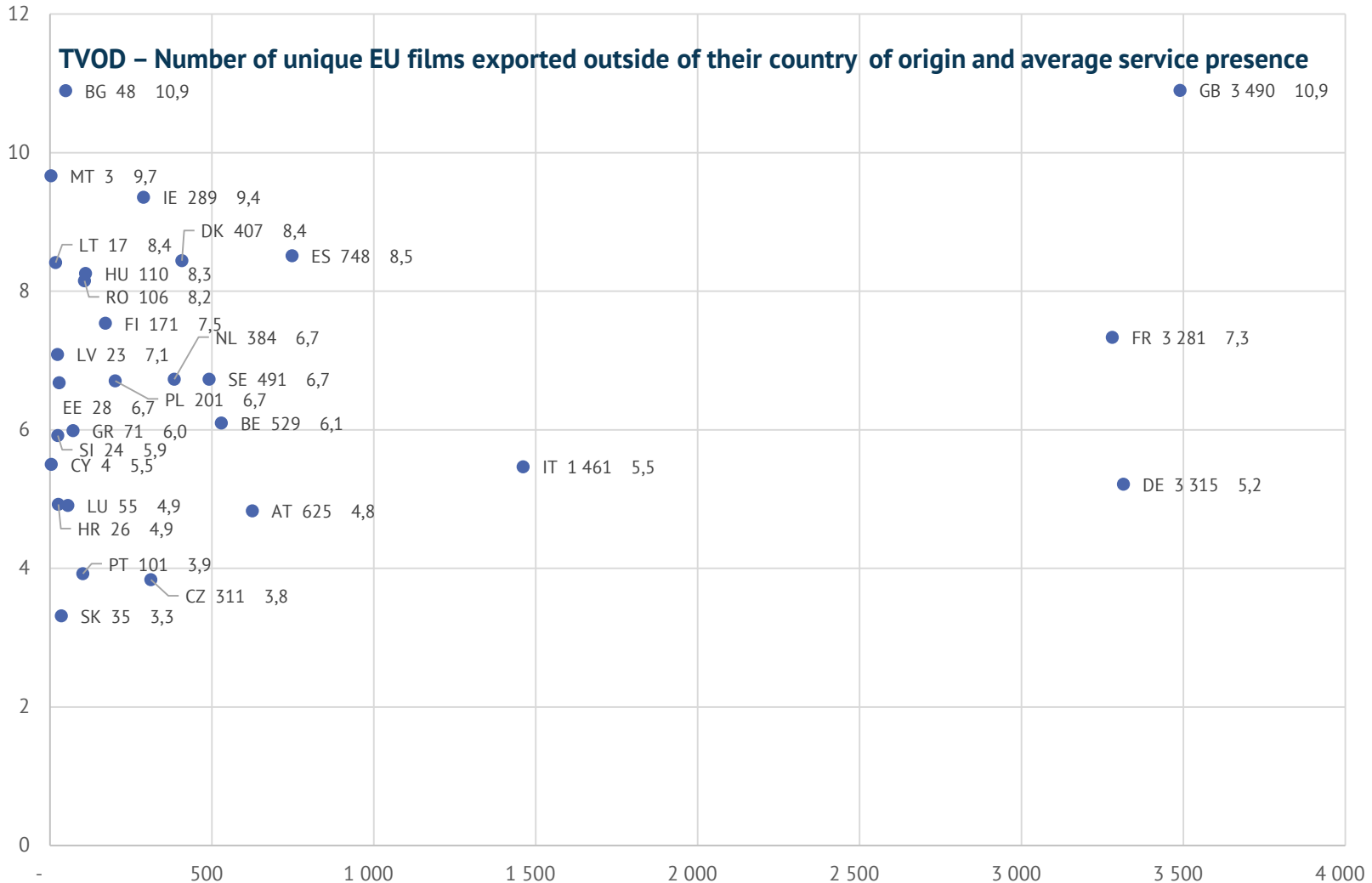
Export of EU films in 32 national TVOD catalogues



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

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

- ▶ British titles circulate the best on services with an average of 10,9 services and have the highest number of exported film titles
- ▶ Spanish titles are the second best circulating titles from EU-5 when they are exported
- ▶ Titles from smaller film producing like Bulgaria, Ireland or Denmark can have also a high service circulation for a smaller number of titles



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

Top 20 EU film titles exported on TVOD services

- ▶ British film titles represented 13 out of the 20 top film titles
- ▶ 4 French titles, and respectively one German, Spanish and Irish titles completed the top list
- ▶ The median production year was 2010 for the titles of the top 20 list
- ▶ Only 3 titles were less than 2 years old

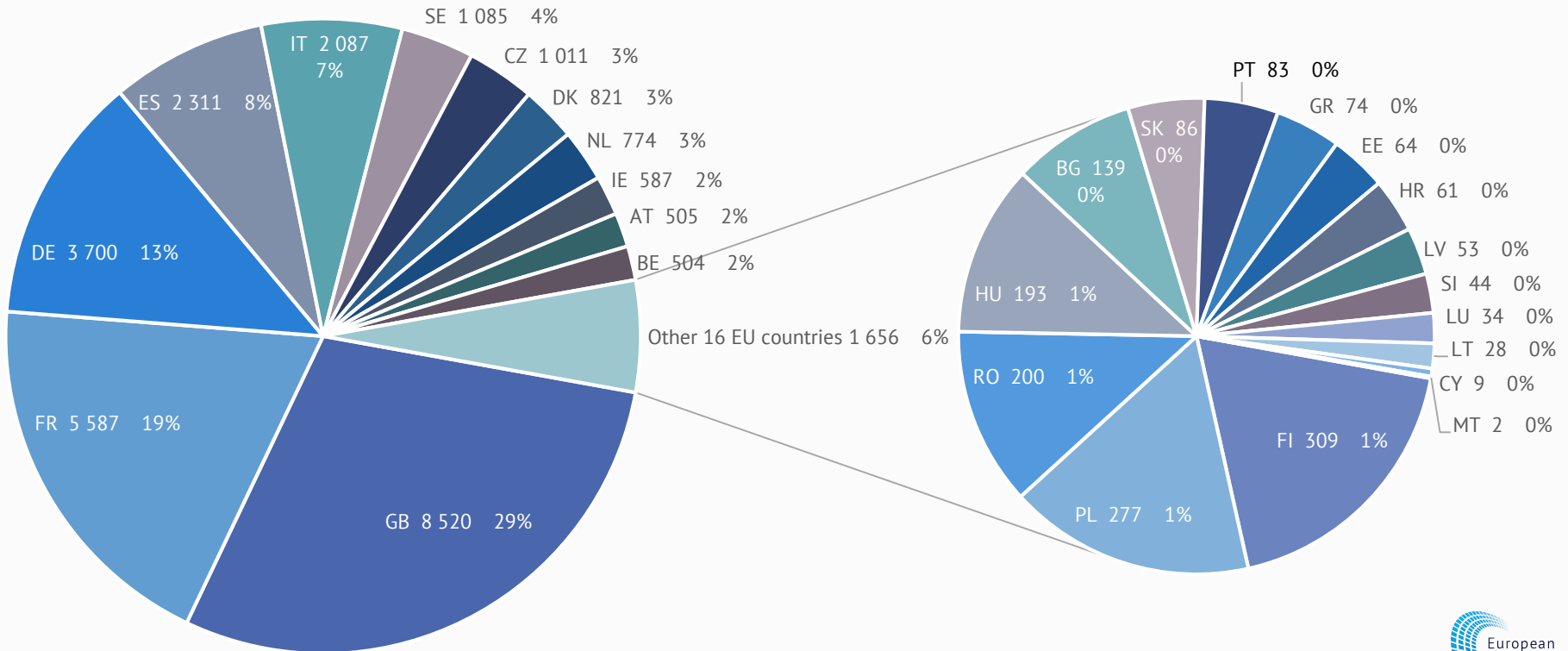
Top 20 EU exported film titles in 146 TVOD catalogues

Original title	Production country	Year of production	Number of catalogues	Number of countries
The Danish Girl	GB,US,BE,DK,DE	2015	90	17
Notting Hill	GB,US	1999	88	17
Snatch	GB,US	2000	86	17
Johnny English Strikes Again	GB,US,FR	2018	86	17
Lucy	FR	2014	84	19
Hitman	FR, US	2007	84	17
Astérix aux jeux olympiques	FR,DE,ES,IT	2008	83	15
The Shining	GB,US	1980	82	17
Mary Magdalene	GB	2018	81	17
28 Weeks Later	GB,ES	2007	81	17
About Time	GB	2013	81	17
Das Tagebuch der Anne Frank	DE	2016	79	16
The Full Monty	GB	1997	78	17
The Lobster	IE,FR,GB,NL,GR	2015	78	19
Bridget Jones's Diary	GB,US	2001	77	16
Tadeo Jones 2: El secreto del Rey Midas	ES	2017	74	17
Taken 2	FR	2012	74	16
The Last King of Scotland	GB,DE	2006	74	17
Paddington 2	GB,FR	2017	74	17
Sunshine	GB,US,BE,DK,DE	2007	74	17

Which EU countries export the most on SVOD?

- ▶ British films also dominate the export of EU films on SVOD services with 29%.
- ▶ EU-5 films take the first five places in the top exporting film producing countries, with 76% of all exported films
- ▶ Swedish, Czech, Danish, Dutch and Irish films complete the top 10 export countries list

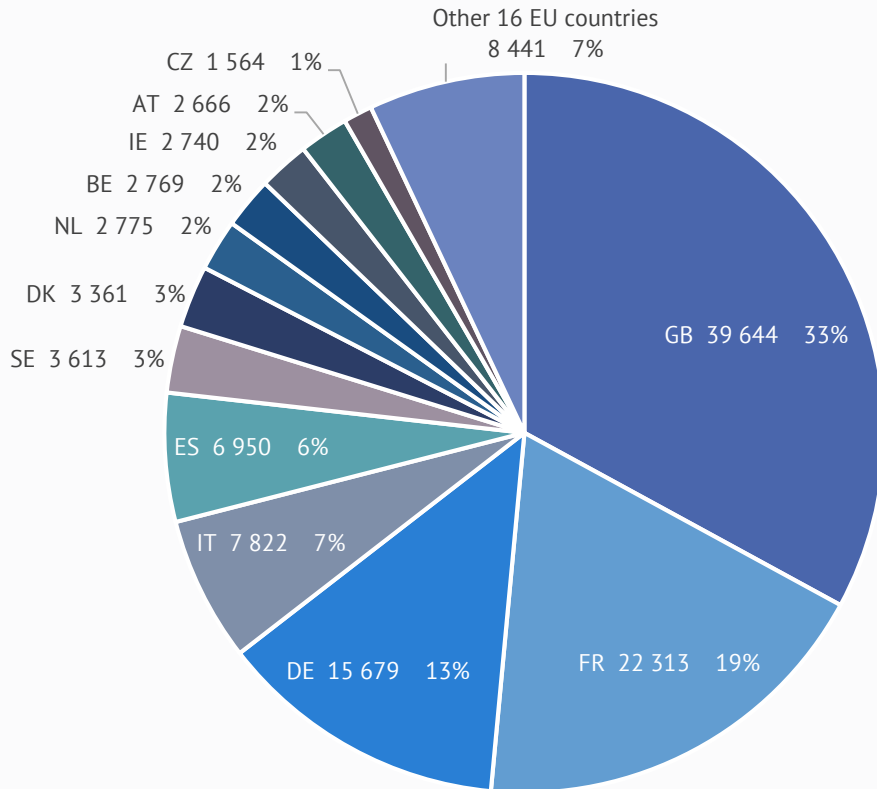
SVOD – Number of EU films exported outside of their national market by country of origin



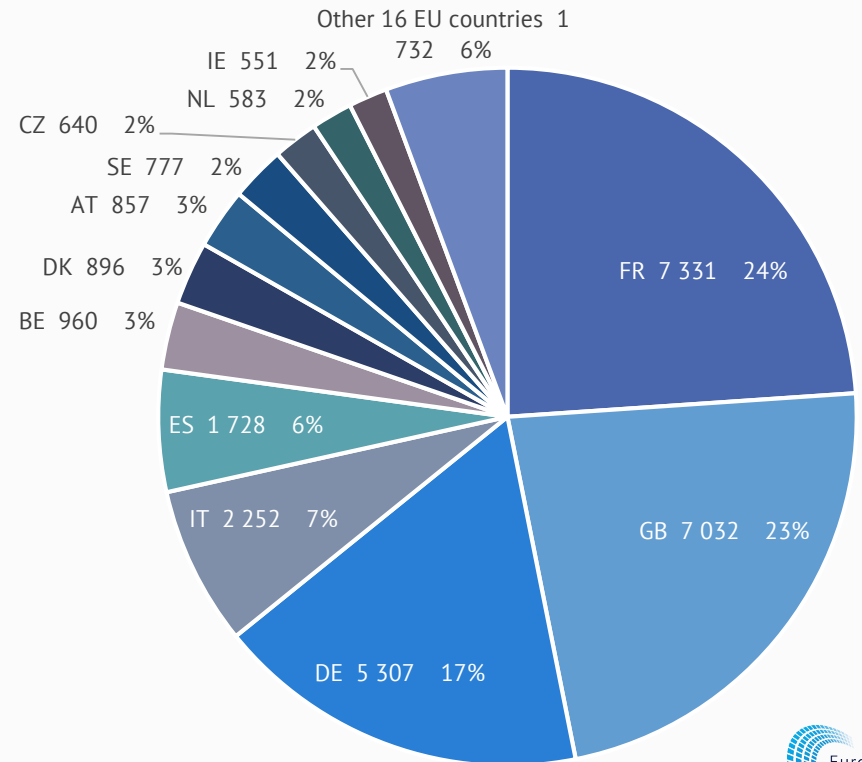
Comparable proportions of films on SVOD as on TVOD for multi-country and national services

- ▶ While British films represent 1/3 of all EU exported films in multi-country SVOD catalogues, **French and British films are more equally represented in national catalogues**, the same as it was the case on TVOD
- ▶ For films of other EU countries, the proportions are comparable when it comes to their export

Export of EU films in 109 multi-country SVOD catalogues



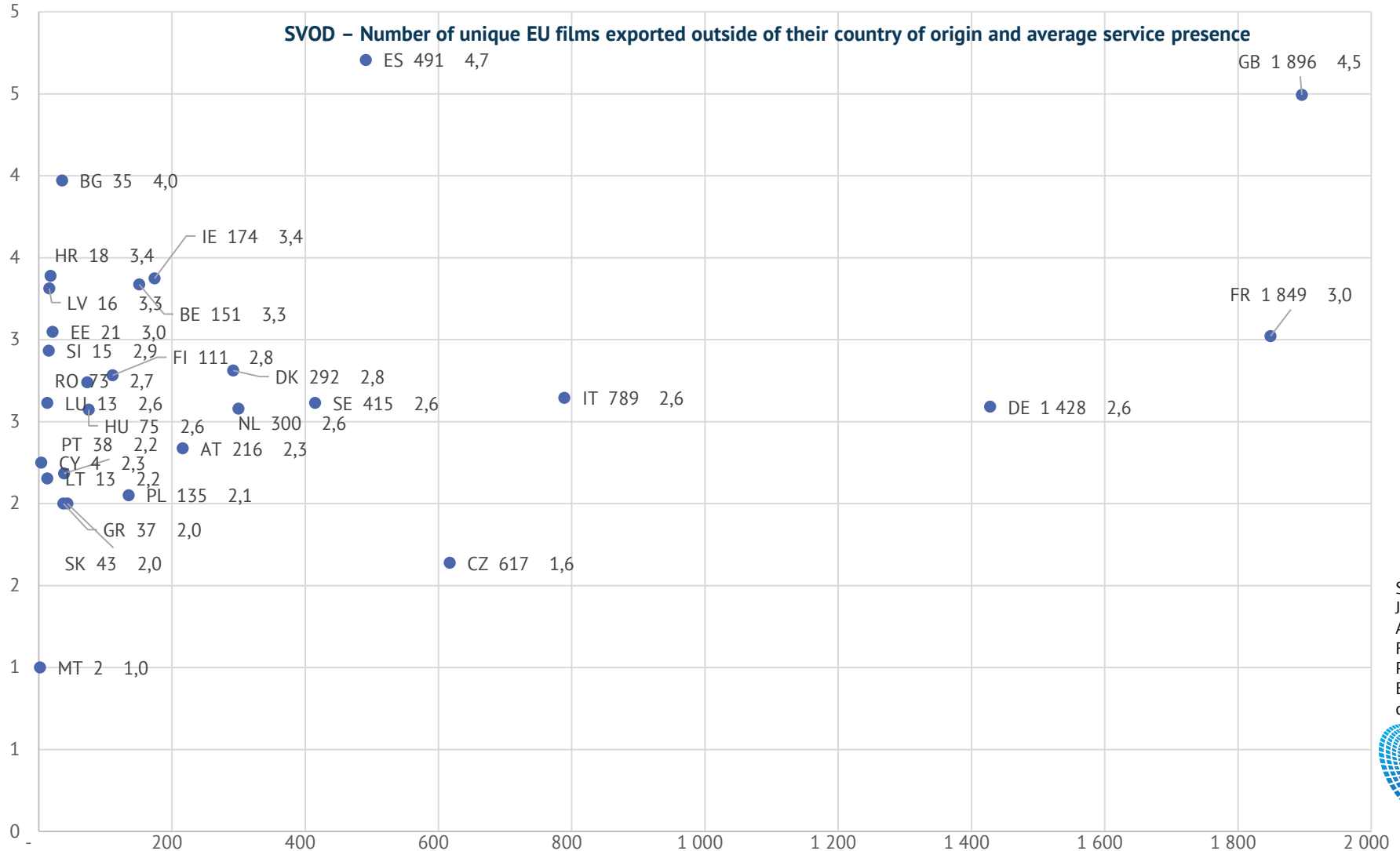
Export of EU films in 27 national SVOD catalogues



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

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

- Spanish titles circulated the best, even with a lower number of titles, followed by British titles
- Titles from smaller film producing like Bulgaria, Ireland or Belgium can have also a high service circulation for a smaller number of titles
- Heavy exporters such as France and Germany have a lower circulation than many other countries but with much more titles exported



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



Top 20 EU film titles exported on SVOD services

- ▶ British film titles represented 15 out of the 20 top film titles which were present on the most SVOD catalogues
- ▶ The rest of the top list is made up by 2 Bulgarian titles, 2 French and 1 German title
- ▶ The median production year for the top 20 titles was 2007

Top 20 EU exported film titles in 136 SVOD catalogues

Original title	Production country	Year of production	Number of catalogues	Number of countries
Hot Fuzz	GB	2007	31	15
Astérix aux jeux olympiques	FR,DE,ES,IT	2008	31	16
Shaun of the Dead	GB,FR	2004	28	17
10 x 10	GB	2018	28	18
Layer Cake	GB	2004	27	16
Liebe mich!	DE	2014	25	18
Bridget Jones's Diary	GB,US	2001	25	16
Snatch	GB,US	2000	25	17
The Gruffalo's Child	GB,DE	2011	25	16
Acts of Vengeance	BG	2017	24	16
Mr. Bean's Holiday	GB,FR,DE,US	2007	24	14
About Time	GB	2013	23	16
Bridget Jones: The Edge of Reason	GB,US,FR,DE,IE	2004	23	15
Johnny English	GB,US	2003	22	16
Bullet Head	BG,US	2017	22	17
The Gruffalo	GB,DE	2009	21	16
Love Actually	GB,US	2003	21	16
Slumdog Millionaire	GB	2008	20	13
Notting Hill	GB,US	1999	20	16
Bienvenue à Marly-Gomont	FR	2016	19	16

TV content in VOD catalogues in the EU
Overview of
53 TVOD catalogues
and
118 SVOD catalogues

C.1 – Size of TV content catalogues

TV content is analysed under 3 dimensions: number of cumulated **titles, seasons & episodes** are shown separately

TVOD catalogues are bigger than SVOD catalogues in average number of titles, seasons and episodes

- ▶ The differences in size are more flagrant when counting in episodes (TVOD 85% bigger than SVOD)

SVOD catalogues are bigger than TVOD catalogues in median number of titles and seasons, but not in episodes

Multi-country TVOD services are the biggest, but national TVOD services are also almost as big as Multi-country SVOD services in average number of titles, seasons and episodes

- ▶ National SVOD services are smaller, with proportionally even less seasons and episodes

55% of all catalogues have less than 250 titles, 500 seasons, 7 000 episodes in median numbers

- ▶ National services have less titles, seasons and episodes than multi-country services (50% less for TVOD, 60% less for SVOD) in median numbers

Biggest catalogues in maximum number of contents are found on multi-country TVOD for titles (3 989), seasons (8 792) and episodes (141 461)

- ▶ Maximum titles, seasons and episodes is equivalent for Multi-country SVOD and national TVOD

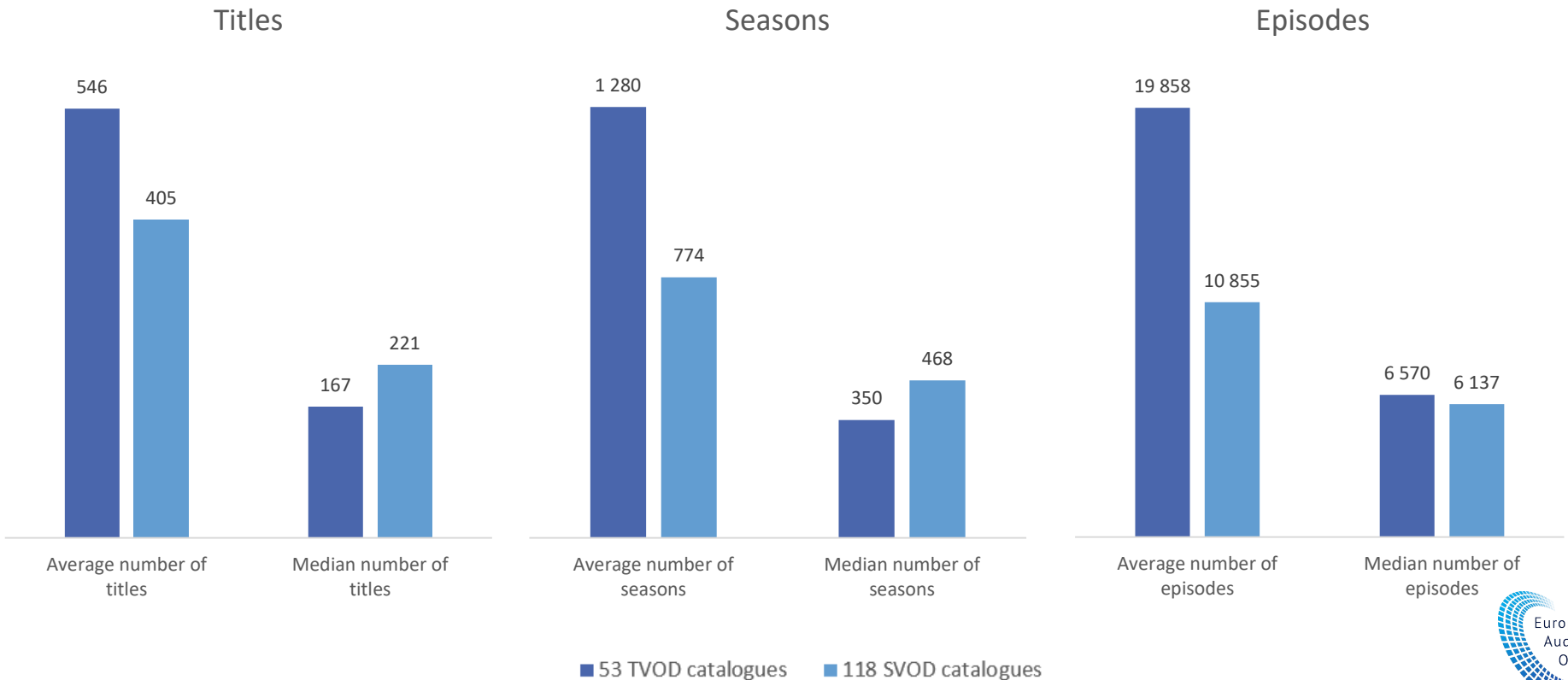
Huge variances in size reflect TVOD dominance in TV contents offer

- ▶ TVOD services offer more titles, seasons and proportionally even more episodes to their customers
- ▶ SVOD national services fail to provide equivalent offer of titles, seasons and episodes

Size of TV content catalogues in average and median Titles, Seasons and Episodes

- ▶ On average, **TVOD catalogues are bigger** than SVOD catalogues in titles, seasons and episodes
- ▶ In SVOD, titles represent 75% of TVOD size, seasons 60% and **episodes only 55%** of TVOD size
- ▶ The **median TVOD and SVOD catalogues** shows that SVOD is bigger in titles and seasons

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

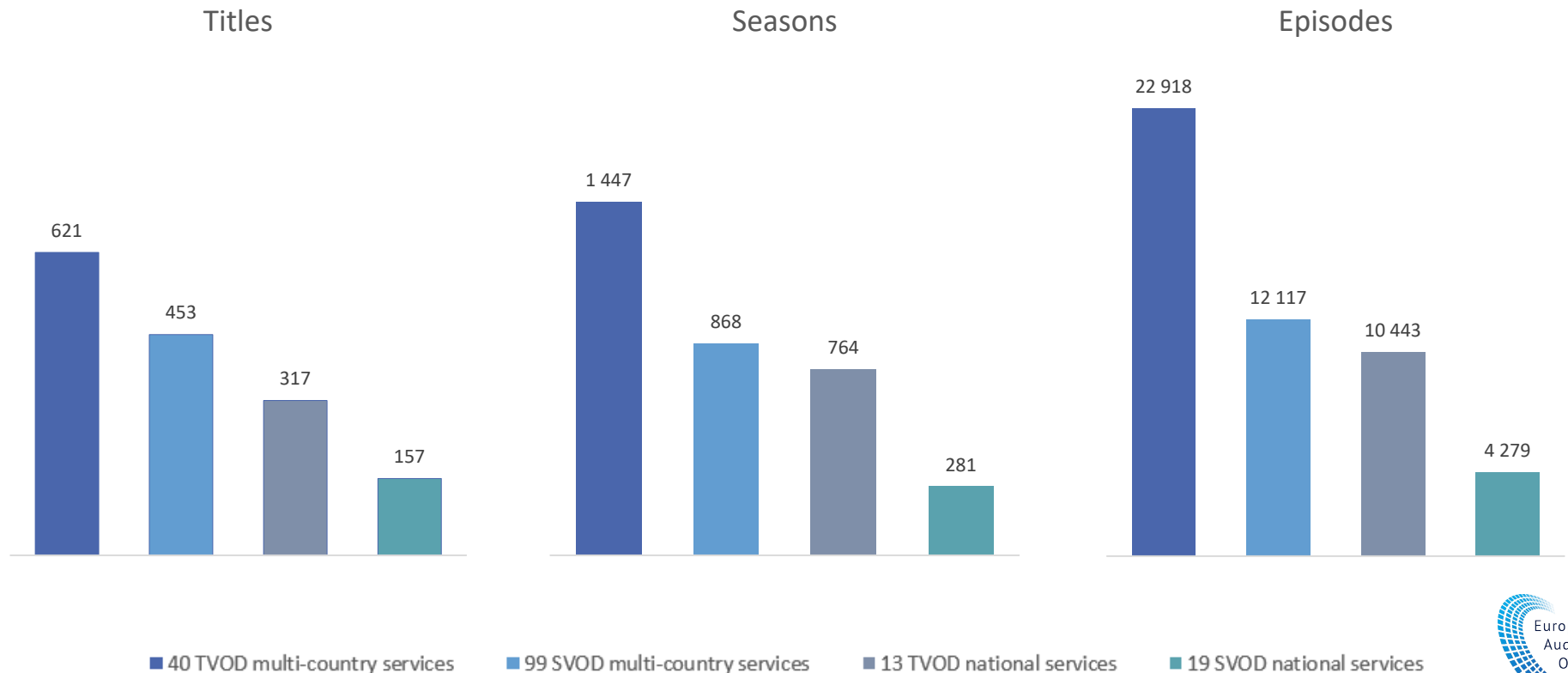


Source: JustWatch catalogue data

Average size of TV content catalogues by multi-country and national services

- ▶ Multi-country TVOD services are the biggest, in **average number of titles, seasons and episodes**
- ▶ TVOD dominance: National TVOD services are almost as big as multi-country SVOD services
- ▶ **National SVOD services** are smaller, with proportionally even less seasons and episodes

Average size of TV content catalogues by business model and multi-country vs. national, in number of titles, seasons and episodes

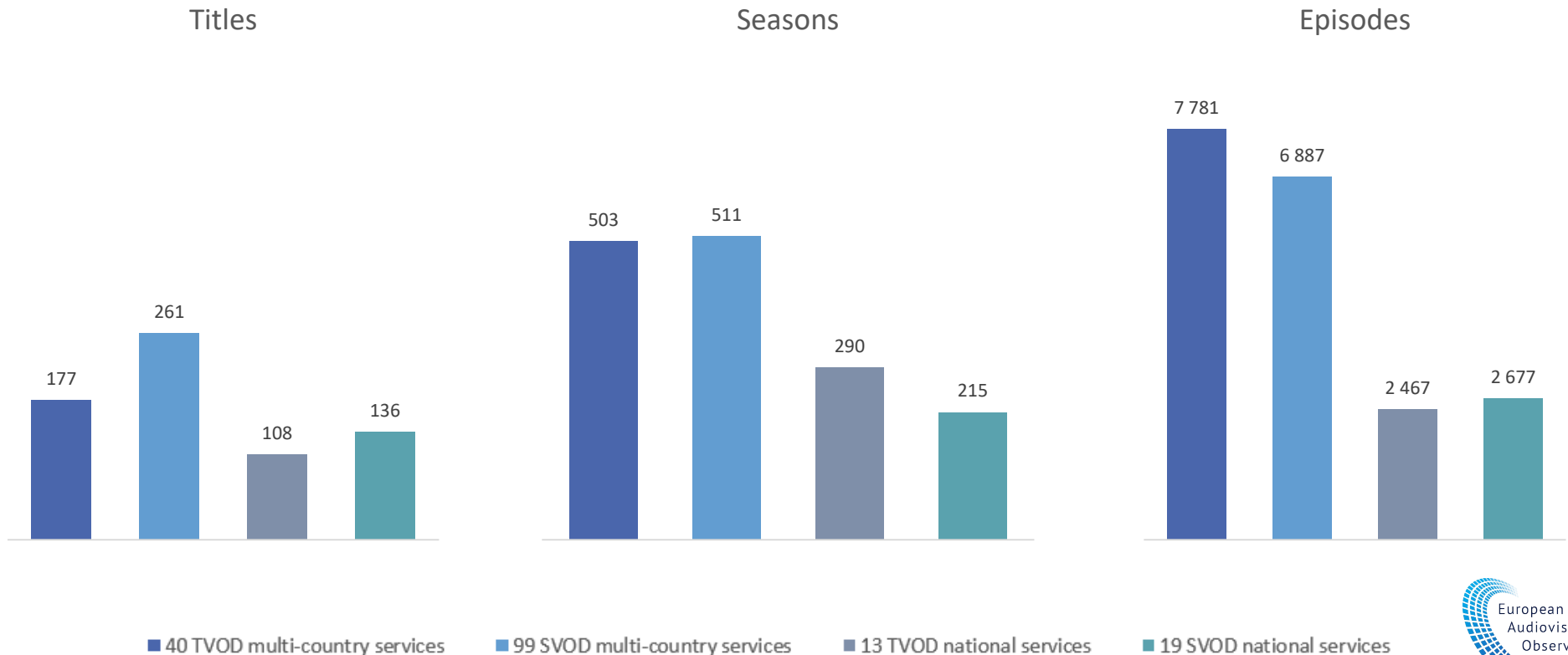


Source: JustWatch catalogue data

Median size of TV content catalogues by multi-country and national services

- ▶ 55% of all catalogues have less than 250 titles, 500 seasons, 7 000 episodes
- ▶ SVOD stronger in titles, TVOD bigger in episodes; both comparable in seasons
- ▶ National services have around 50% less titles, seasons and episodes than multi-country services

Median size of TV content catalogues by business model and multi-country vs. national, in number of titles, seasons and episodes

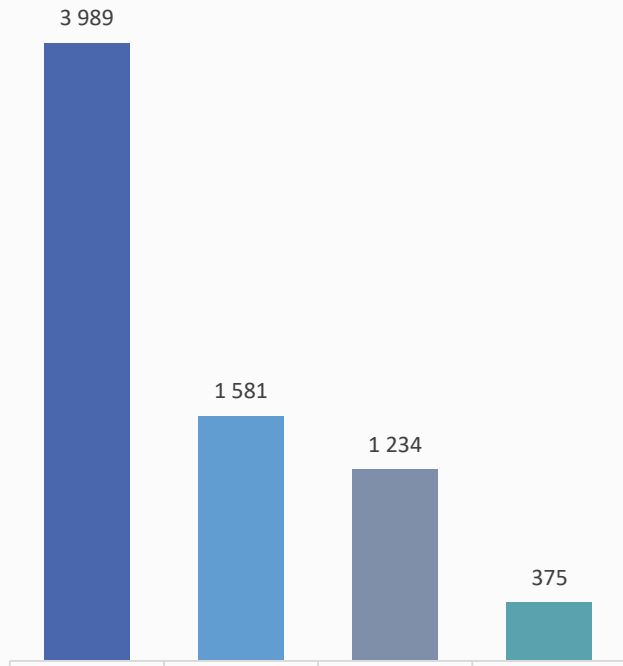


Source: JustWatch catalogue data

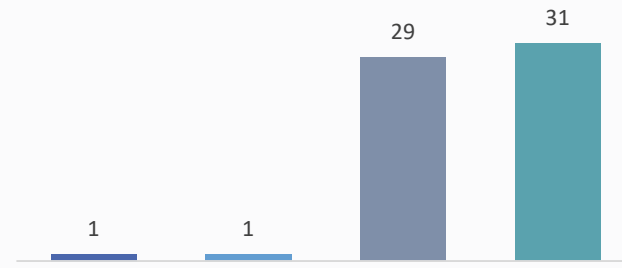
Important disparities in the number of TV titles for TVOD and SVOD services

- ▶ **TVOD** multi-country is **2,5x** and TVOD national is **3,3x bigger in titles** than SVOD equivalents
- ▶ Biggest **national TVOD** service has almost the **same size in titles** as biggest **multi-country SVOD**
- ▶ Biggest national SVOD catalogue is **91% smaller in titles** than biggest multi-country TVOD

Maximum number of TV titles in catalogue by business model



Minimum number of TV titles in catalogue by business model



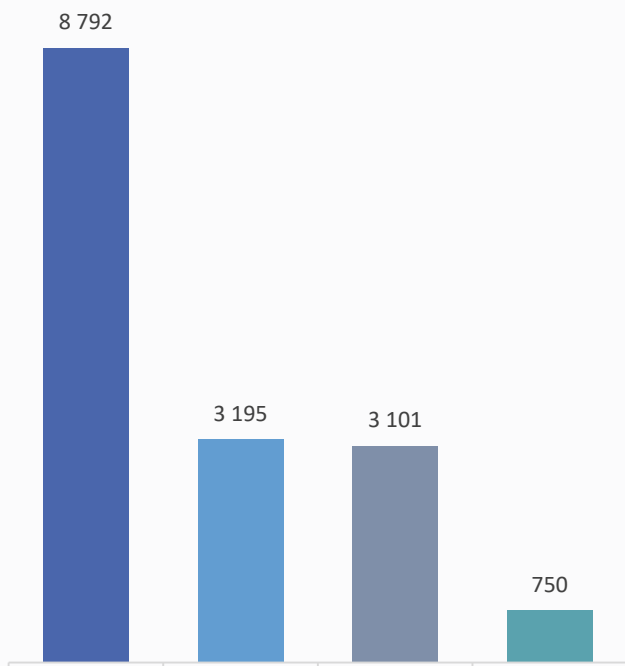
■ 40 TVOD multi-country services ■ 99 SVOD multi-country services ■ 13 TVOD national services ■ 19 SVOD national services

Source: JustWatch catalogue data

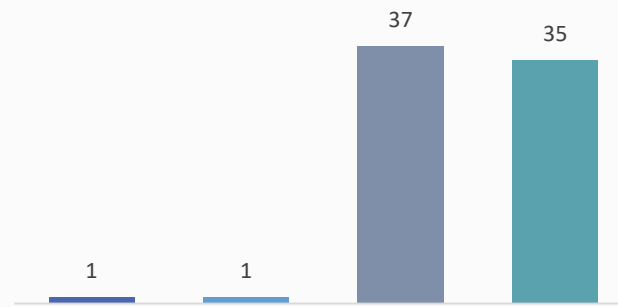
Important disparities in the number of TV seasons for TVOD and SVOD services

- ▶ **TVOD** multi-country is **2,7x bigger** and TVOD national is **4x bigger in seasons** than SVOD equivalents
- ▶ Biggest **national TVOD** catalogue is **equivalent in seasons** to biggest multi-country SVOD catalogue
- ▶ Biggest national SVOD catalogue is **92% smaller in seasons** than biggest multi-country TVOD

Maximum number of TV **seasons** in catalogue by business model



Minimum number of TV **seasons** in catalogue by business model



■ 40 TVOD multi-country services

■ 99 SVOD multi-country services

■ 13 TVOD national services

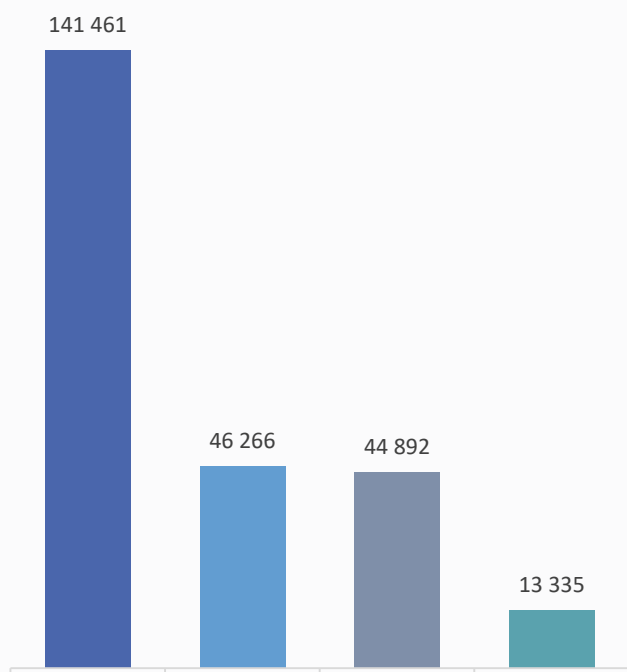
■ 19 SVOD national services

Source: JustWatch catalogue data

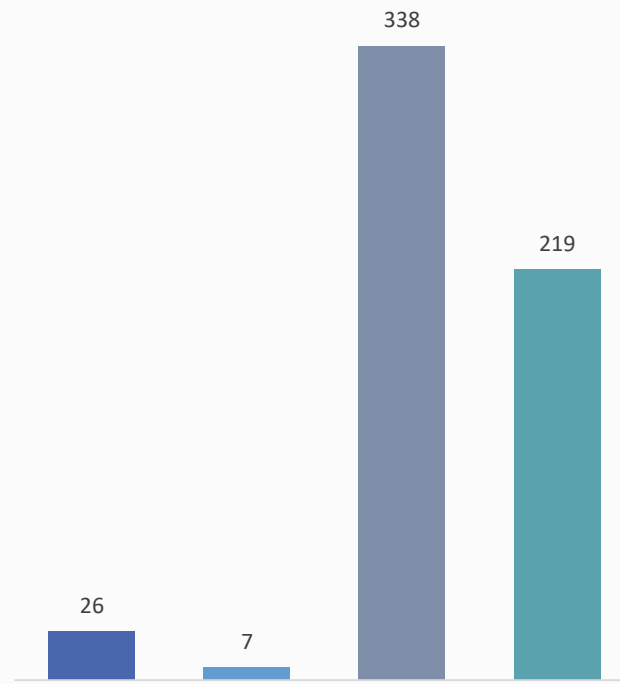
Important disparities in the number of TV episodes for TVOD and SVOD services

- ▶ **TVOD** multi-country is **3x bigger** and TVOD national is **3,4x bigger in episodes** than SVOD equivalents
- ▶ Biggest **national TVOD** catalogue is **equivalent in episodes** to biggest multi-country SVOD catalogue
- ▶ Biggest national SVOD catalogue is **91% smaller in episodes** than biggest multi-country TVOD

Maximum number of TV episodes in catalogue by business model



Minimum number of TV episodes in catalogue by business model



■ 40 TVOD multi-country services

■ 99 SVOD multi-country services

■ 13 TVOD national services

■ 19 SVOD national services

Source: JustWatch catalogue data

C.2 – Unique TV contents available in VOD catalogues

TV content is analysed in **number of unique titles**

By region of origin, EU 28 leads in number of unique TV titles on VOD in Europe (41% of titles)

- ▶ US provides 37% of unique titles on VOD in Europe
- ▶ 21% of unique titles come from Other regions

Almost half (48%) of the European unique titles available on VOD come from the United Kingdom

- ▶ Followed by Germany (one fifth of unique European titles) and France (11%)

The five countries with higher production capacity (the United Kingdom, Germany, France, Spain and Italy) provide the majority of European unique titles (87%) on VOD in Europe

TVOD: EU 28 origin (43%) and US origin (42%) equally provide the majority of unique titles

- ▶ The United Kingdom (53%) and Germany (24%) are the main providers of European unique titles on TVOD
- ▶ With France, the three countries provide 90% of unique European titles on TVOD catalogues

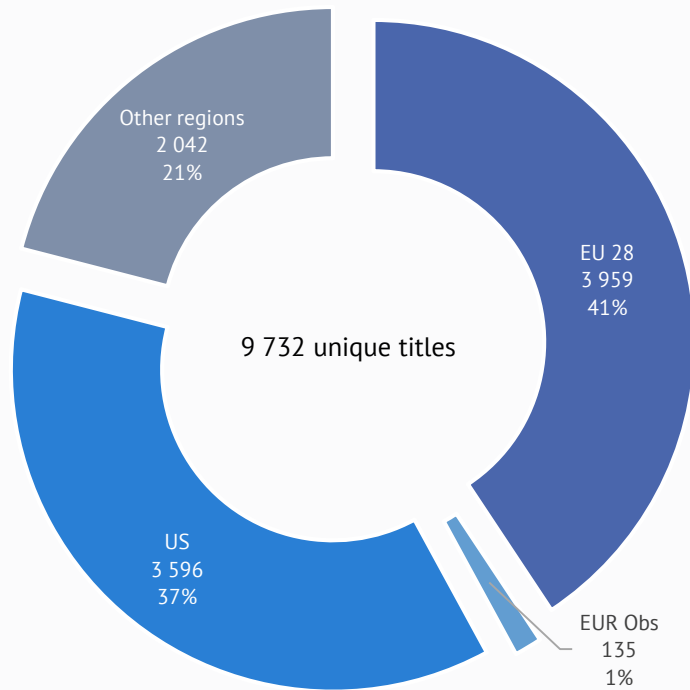
SVOD: European origin leads; unique titles from Other regions represent 25% of the offer

- ▶ Other region's principal origin being: Japan (animation, youth), Canada (animation, fiction), South Korea (fiction, animation) and Australia (fiction, documentary, animation)
- ▶ European unique titles on SVOD come mainly from the UK (44%), Germany, Spain and France Smaller
- ▶ production capacity countries (NL, BE, Nordics) are providers of many unique titles on SVOD

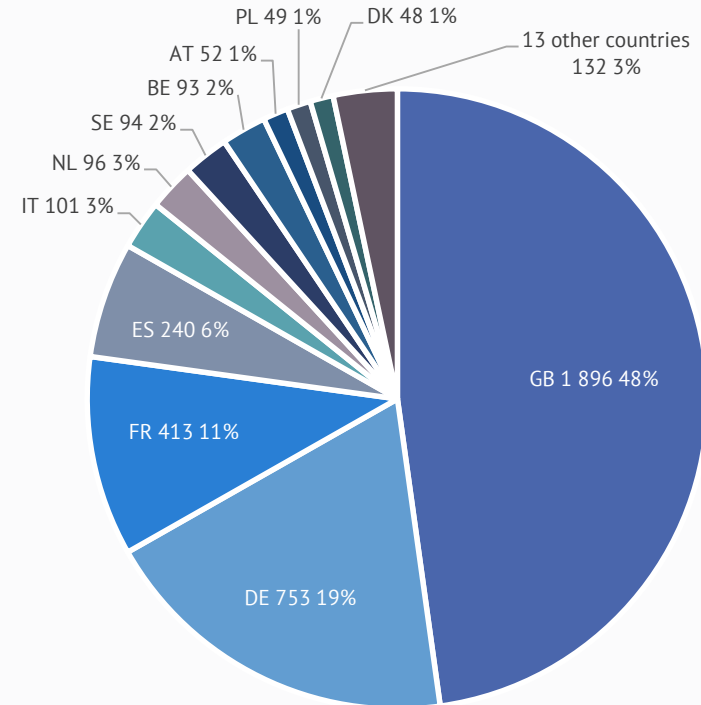
Unique TV titles available in all VOD catalogues: European and UK origin

- ▶ **EU leads in number of unique TV content titles** in VOD in Europe by region of origin
- ▶ Almost **half of the EU TV titles offer is of UK origin** and DE provides another fifth
- ▶ Almost **90%** of unique EU TV titles come from the **five main production countries**

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



Origin of unique EU TV titles in VOD catalogues by country of origin



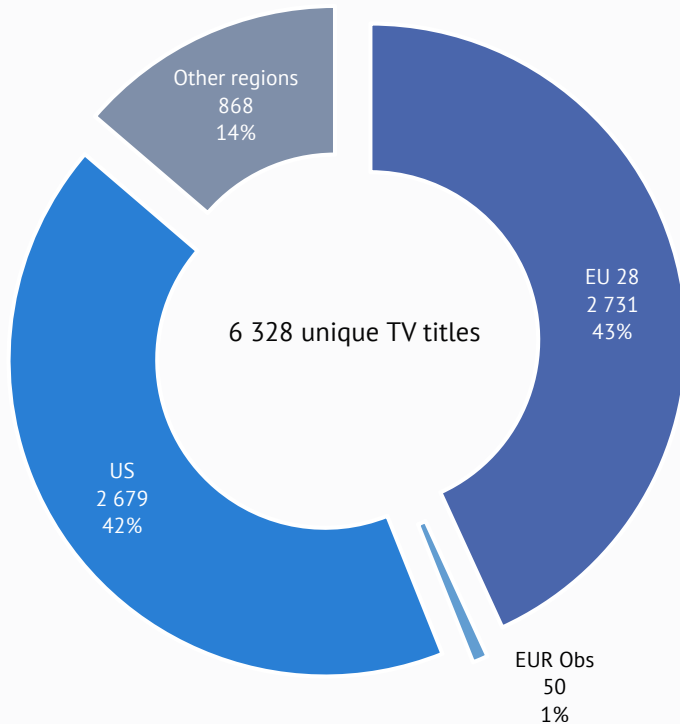
928 unique TV titles could not be identified and have been excluded from the analysis. They represent 8,8% of total TV titles.

Source: JustWatch catalogue data

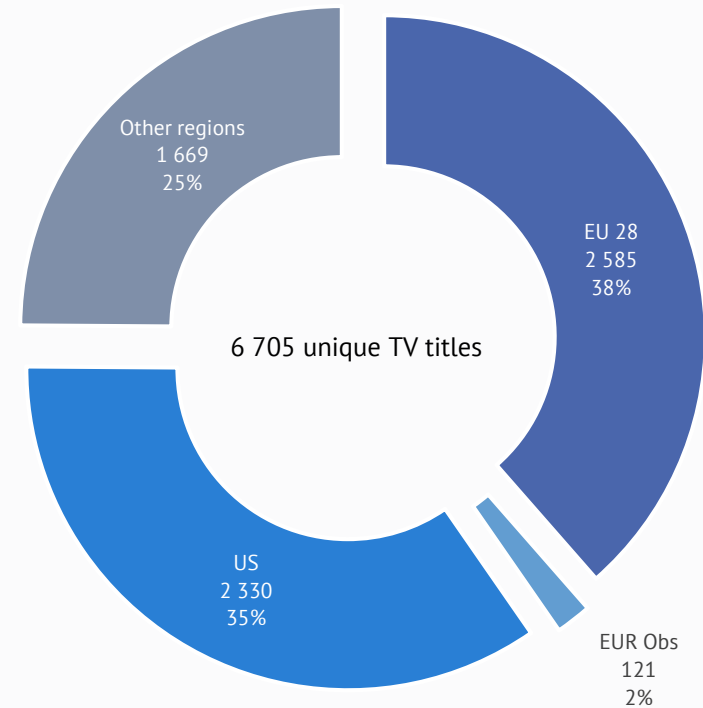
Similar choice of unique TV titles on TVOD and SVOD

- ▶ **EU leads in number of TV titles** both on TVOD (over two fifths) and on SVOD
- ▶ TV titles from **other regions** represent **one in four titles on SVOD**

Origin of unique TV titles in TVOD catalogues



Origin of unique TV titles in SVOD catalogues



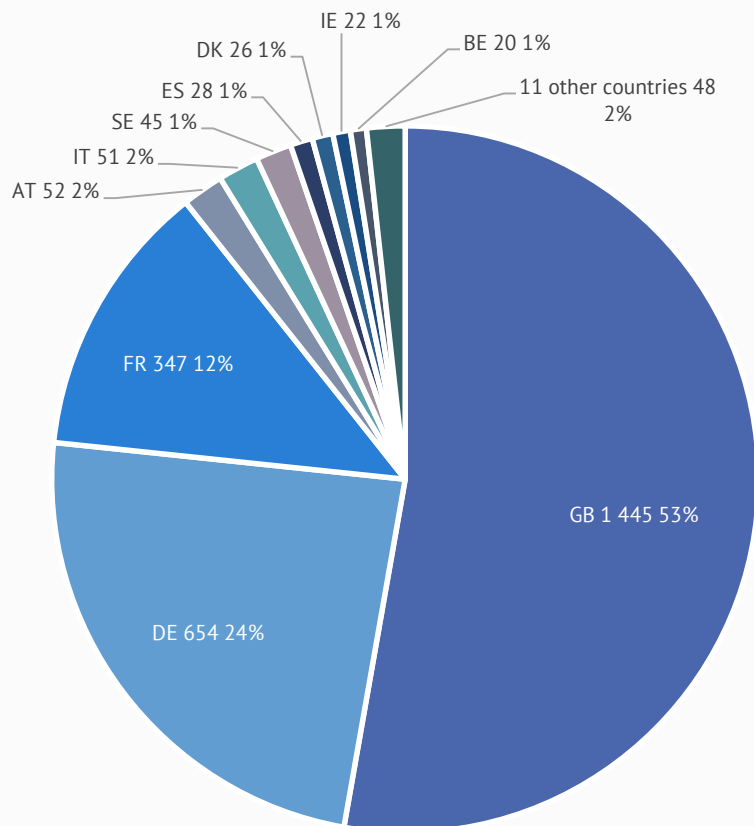
Source: JustWatch catalogue data

On TVOD, 536 TV titles have not been identified (7,9% of all titles), on SVOD the number of unidentified titles was 559 (or 7,7% of all titles). They have been excluded for the analysis.

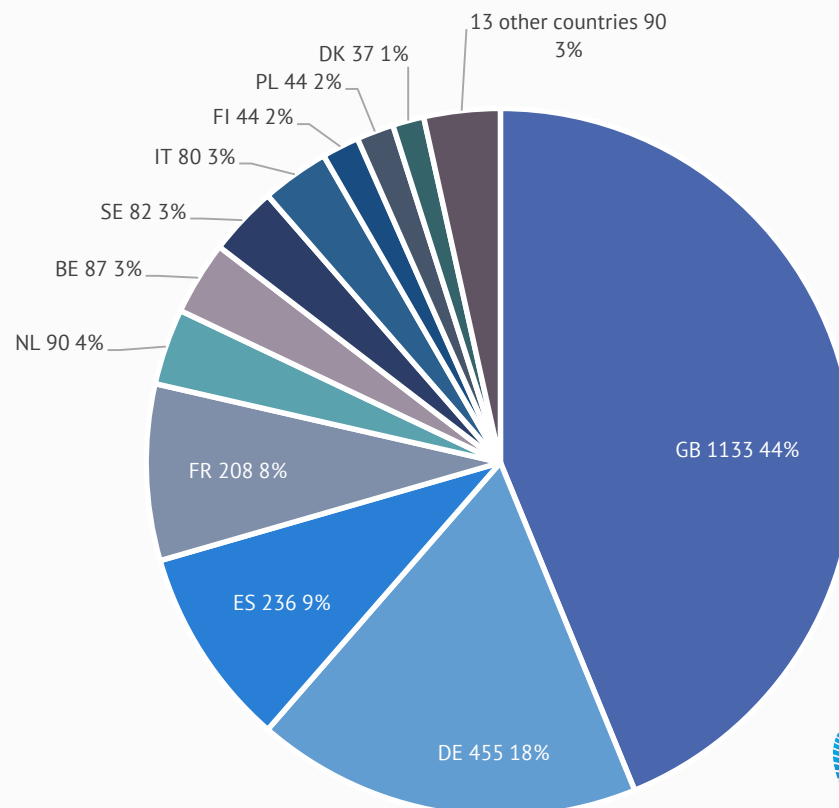
Dominance of English & German TV titles on TVOD, more distributed on SVOD

- ▶ **European TV titles from the UK and Germany are the majority on TVOD** (77% of all titles)
- ▶ **90% of EU TV titles on TVOD** come from 3 countries: the United Kingdom, Germany and France
- ▶ SVOD is more spread, with smaller production countries providing numerous TV titles

Origin of unique EU TV titles in TVOD catalogues



Origin of unique EU TV titles in SVOD catalogues



Source: JustWatch catalogue data

C.3 – Origin and circulation of cumulated TV contents

TV content is analysed in **cumulated number of titles, seasons and episodes**

In total number of titles, seasons and episodes, there are more US TV contents than any other origin on VOD, followed by EU 28 on TVOD and by Other regions on SVOD

- ▶ TVOD: 37% of EU 28 titles represent 31% of seasons and only 25% of episodes
- ▶ SVOD: less European titles and episodes than from Other regions (mainly Asian animation)

Predominance of European titles on national VOD services: 51% on TVOD and 48% on SVOD

- ▶ On national TVOD services, US provides 41% of titles but 50% of seasons and 58% of episodes
- ▶ On national SVOD services, 18% of titles from Other regions reach 24% of total episodes

While multi-country services rely heavily on US TV contents (68% of episodes on TVOD, 57% on SVOD)

- ▶ On multi-country TVOD services, 35% of European titles represent only 24% of total episodes
- ▶ On multi-country SVOD services, more titles from Other regions than from Europe; up to 2% of EUR Obs (weight of Russian, Norwegian titles and of Turkish episodes on Netflix catalogues)

Lower shares of EU TV contents explained by circulation... in less European countries

- ▶ SVOD is fueling circulation of US, 'Other regions' and EUR Obs TV contents in Europe

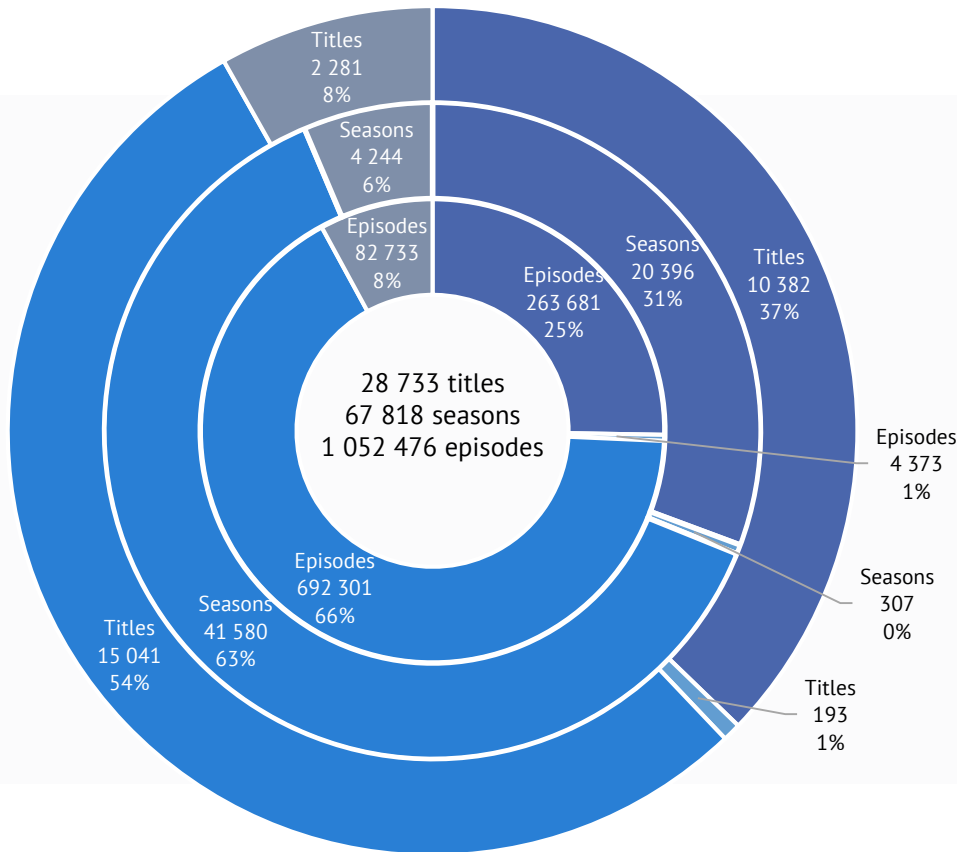
And also, by circulation on fewer services...

- ▶ In All VOD in Europe, it is US TV contents that are found on average in a greater number of services

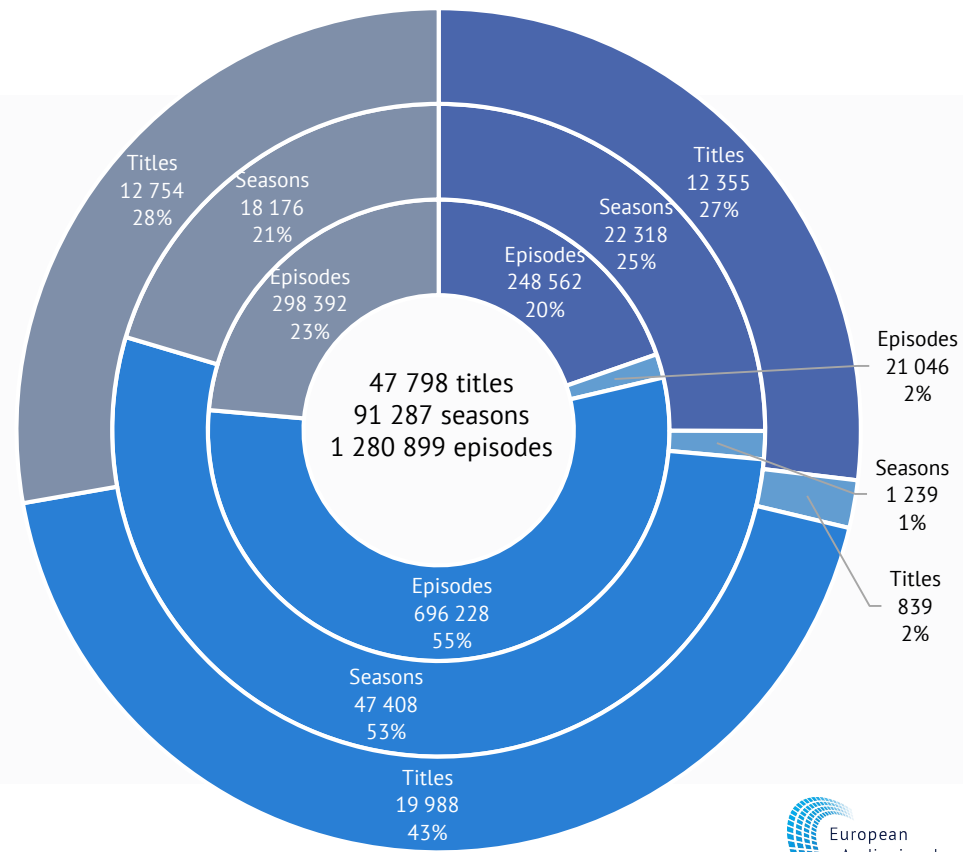
Beyond US dominance, more EU 28 TV contents on TVOD, more Asian on SVOD

- ▶ On TVOD, **37% of EU 28 titles represent** 31% of seasons and only **25% of episodes**
- ▶ **On SVOD**, less titles and episodes from EU 28 than from **Other regions' (28% of titles)**, mainly Asian
- ▶ US TV contents dominate in titles, seasons and episodes everywhere in VOD

Origin of TV contents in 53 TVOD catalogues



Origin of TV contents in 118 SVOD catalogues



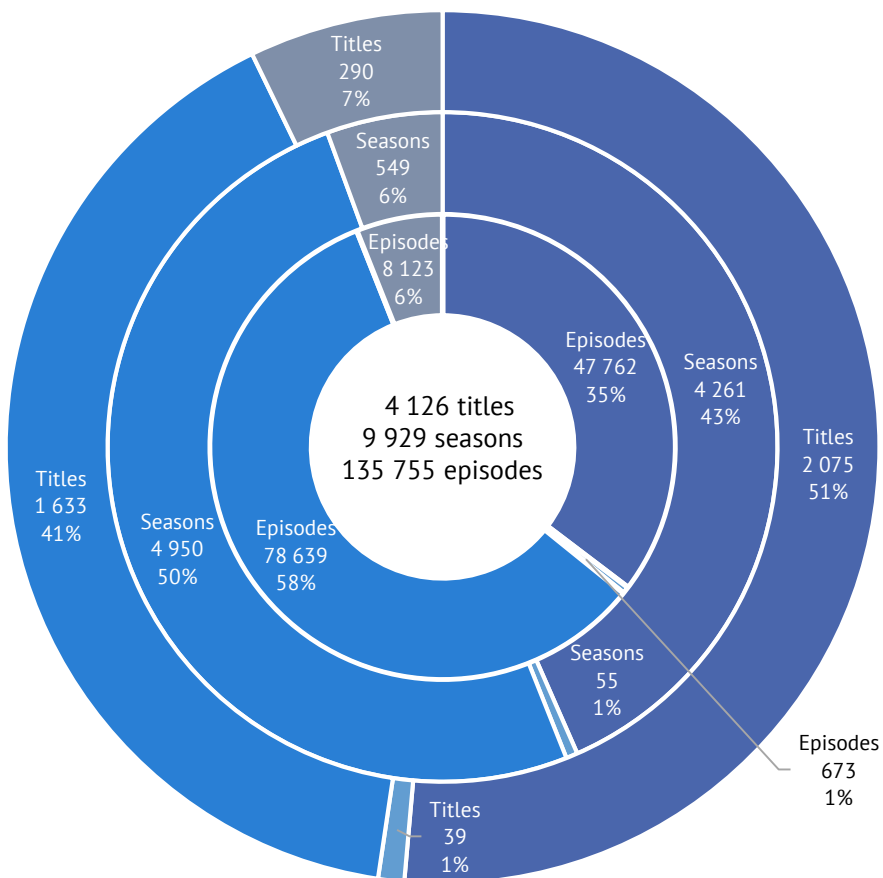
■ EU 28 ■ EUR Obs ■ US ■ Other regions

Source: JustWatch catalogue data

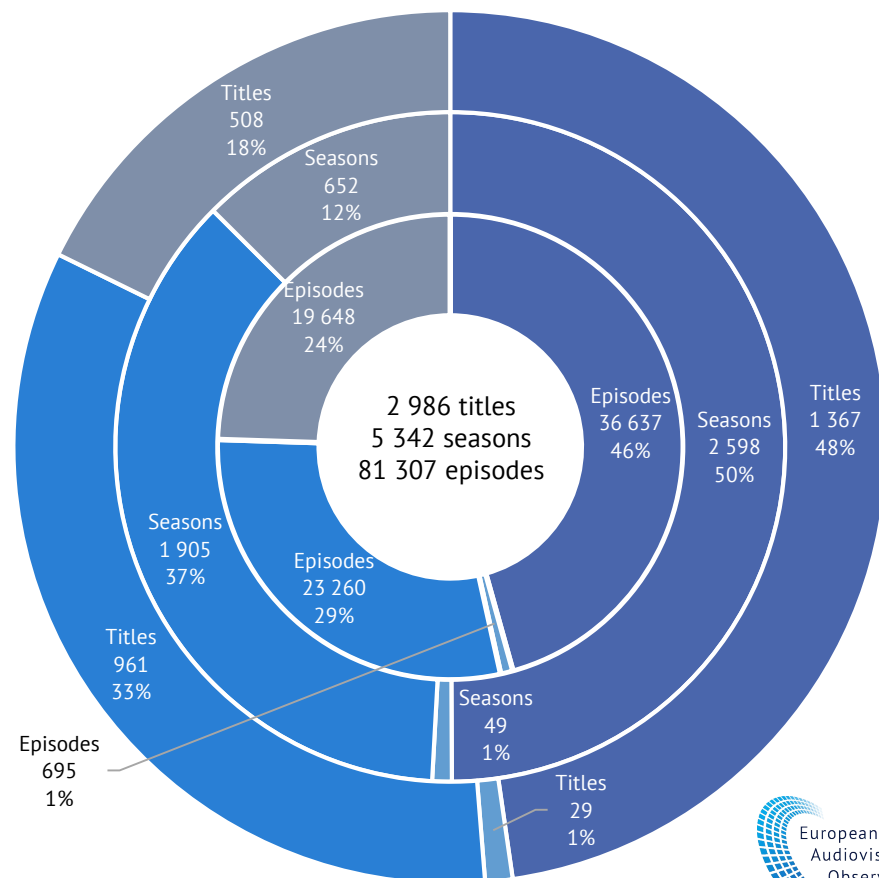
National services have more EU titles, TVOD more US seasons and episodes

- ▶ **Predominance of EU titles on national services:** TVOD (51%) and SVOD (48%)
- ▶ **US TV contents on TVOD** represent 41% of titles but 50% of seasons and **58% of episodes**
- ▶ TV contents from **Other regions on national SVOD** represent **24% of episodes**

Origin of TV contents in 13 national TVOD catalogues



Origin of TV contents in 19 national SVOD catalogues



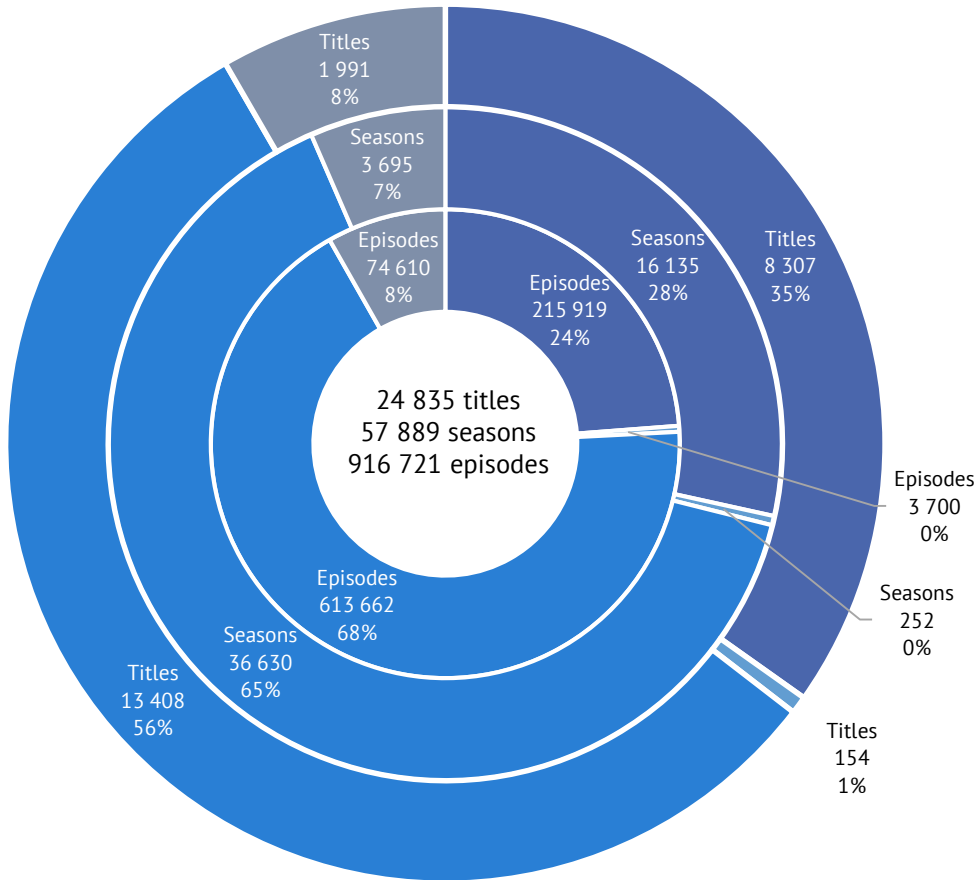
■ EU 28 ■ EUR Obs ■ US ■ Other regions

Source: JustWatch catalogue data

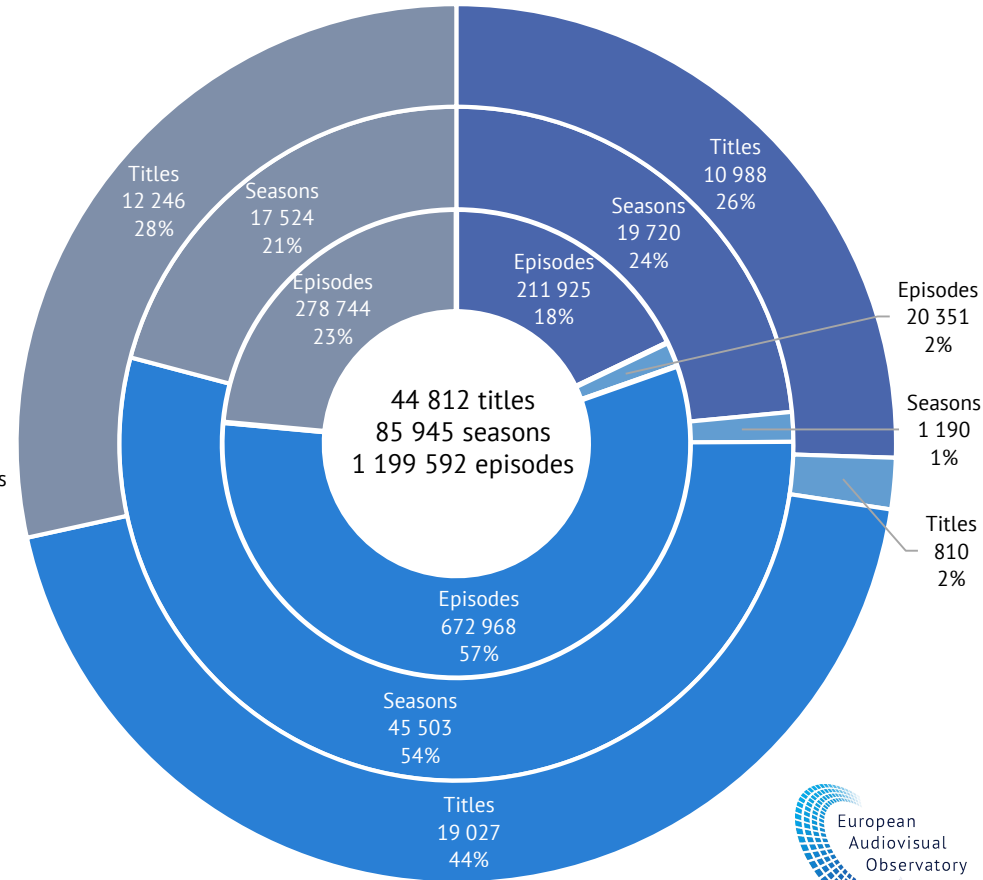
While multi-country services rely heavily on US TV contents

- ▶ **One third of TV titles on TVOD are from EU 28**, but represent only 24% of episodes
- ▶ On SVOD, 26% of EU titles show only 18% of episodes: **European series have fewer episodes**
- ▶ **SVOD** almost **one third of titles are from Other regions** and 2% from EUR Obs (TR, RU, NO)

Origin of TV contents in 40 multi-country TVOD catalogues



Origin of TV contents in 99 multi-country SVOD catalogues



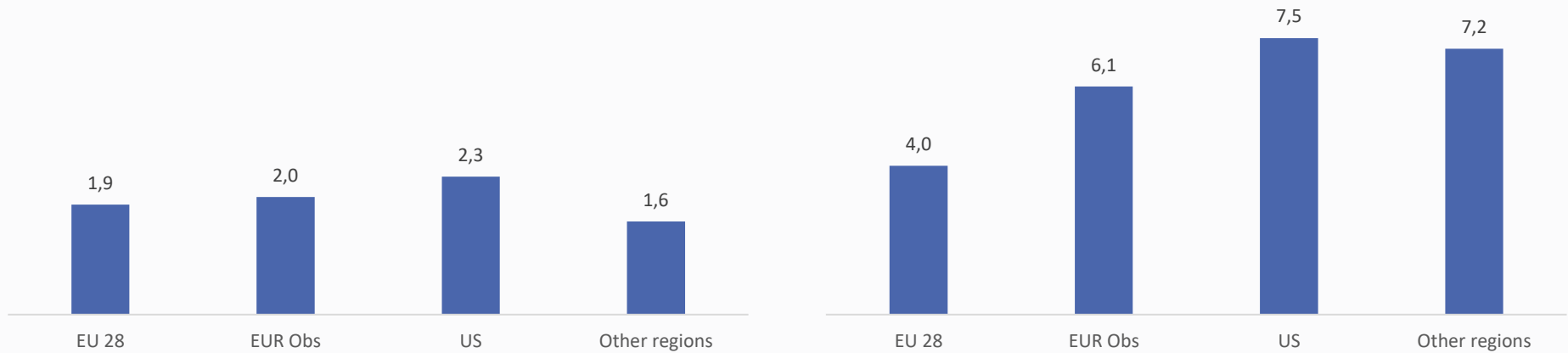
■ EU 28 ■ EUR Obs ■ US ■ Other regions

Source: JustWatch catalogue data

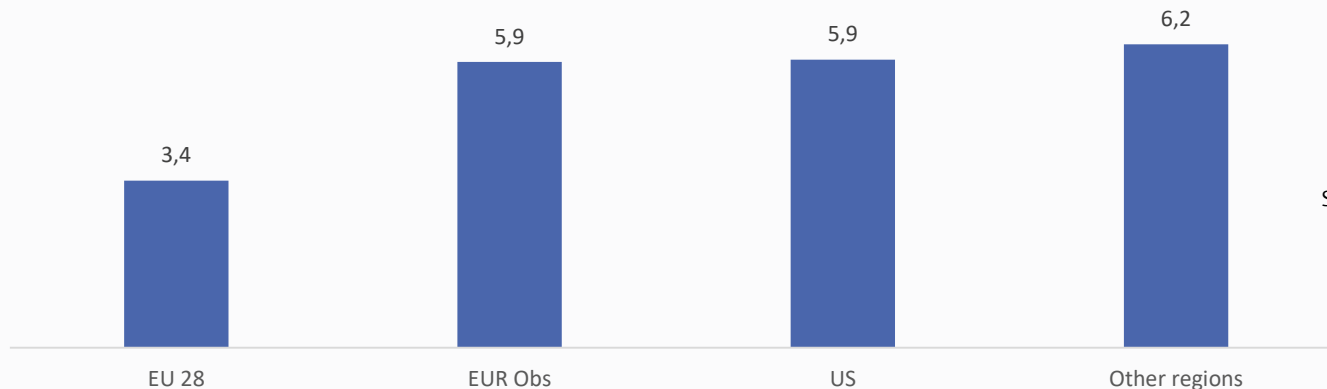
Lower shares of EU TV contents explained by circulation... in less European countries

- ▶ **SVOD is fuelling circulation of US, 'Other regions' and EUR Obs** TV contents in Europe
- ▶ On TVOD and SVOD, it is US TV contents that are found in the largest average number of countries

TVOD – Average circulation of titles on countries by region of origin **SVOD – Average circulation of titles on countries by region of origin**



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

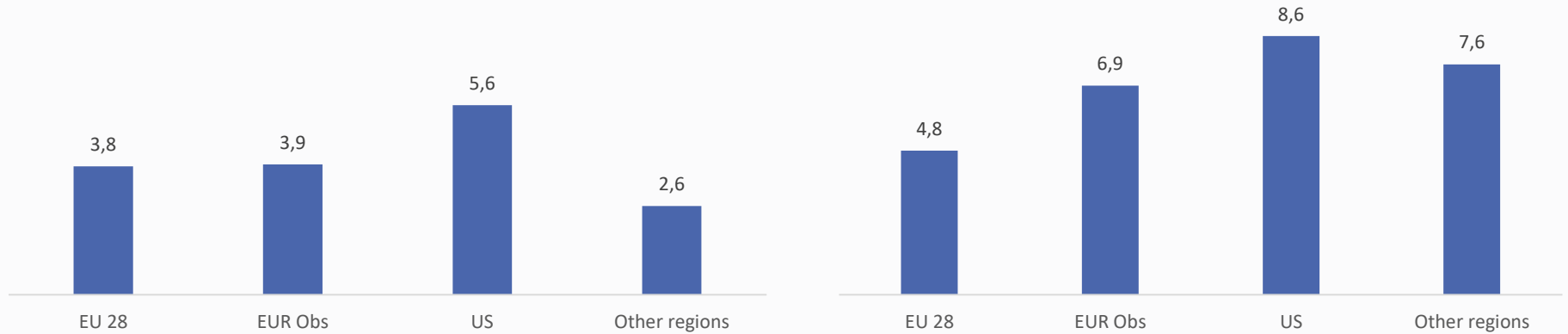


Source: JustWatch catalogue data

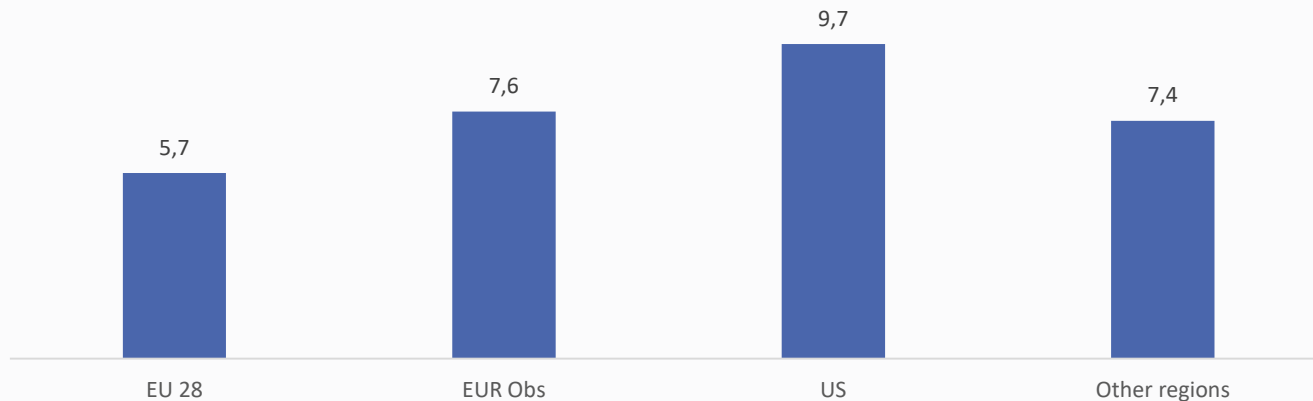
And also, by circulation on fewer services...

- ▶ Although **SVOD brings 'Other regions' and EUR Obs TV contents** to numerous services, US dominates
- ▶ In All VOD in Europe, it is US TV contents that are found on average in a greater number of 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 catalogue data

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

Services owned by tech (on TVOD) and pure VOD players (on SVOD) have the highest number of TV titles in their catalogues

- ▶ 81% of all TV titles found on TVOD are on services owned by tech companies (Apple, Microsoft) and 72% of all TV titles found on SVOD are either on services owned by pure VOD players (Netflix) or tech players (Amazon)

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

- ▶ Distributor services on SVOD, TV and Telecom services on TVOD have almost 50% of EU contents
- ▶ Pure VOD players: majority of US contents on TVOD (73%); one third of Other origin contents on SVOD (more than EU)

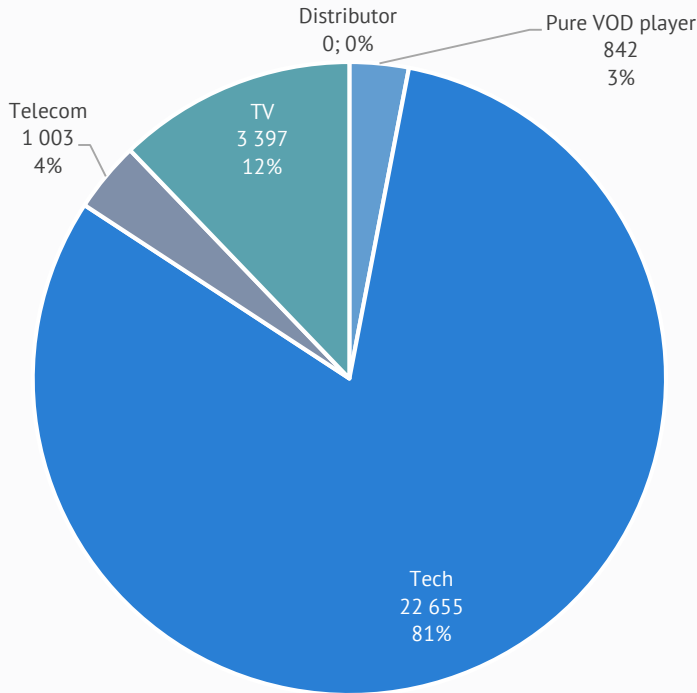
Services owned by EU players have the highest share of EU TV titles while services owned by global players offer overall, the largest number of TV titles

- ▶ With 7 times more TV titles on SVOD than EU services and almost 5 times more TV titles on TVOD, global players have a larger film offering than EU players

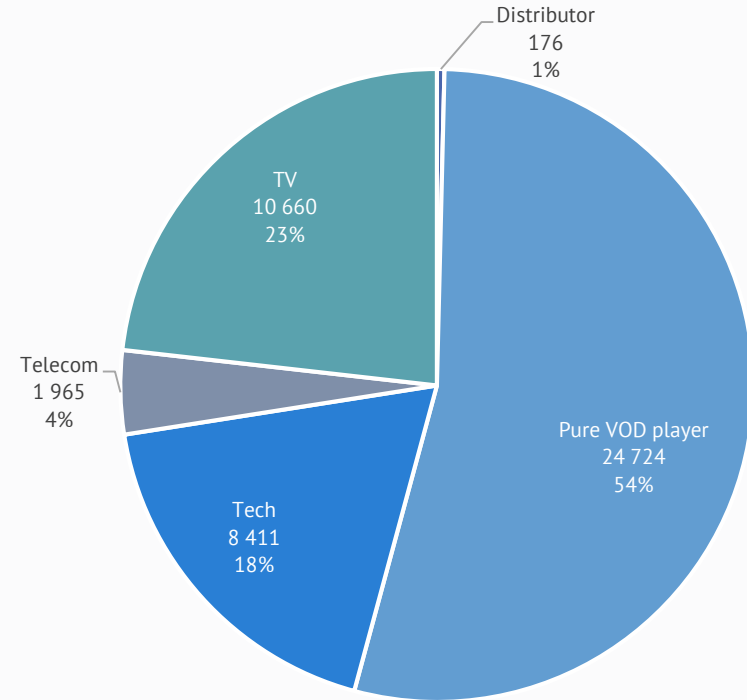
Tech players on TVOD, Pure VOD players on SVOD have the highest number of TV titles in their catalogues

▶ **Tech and pure VOD players** (Amazon, Netflix, iTunes) have the **highest number of titles in their catalogues**

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



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



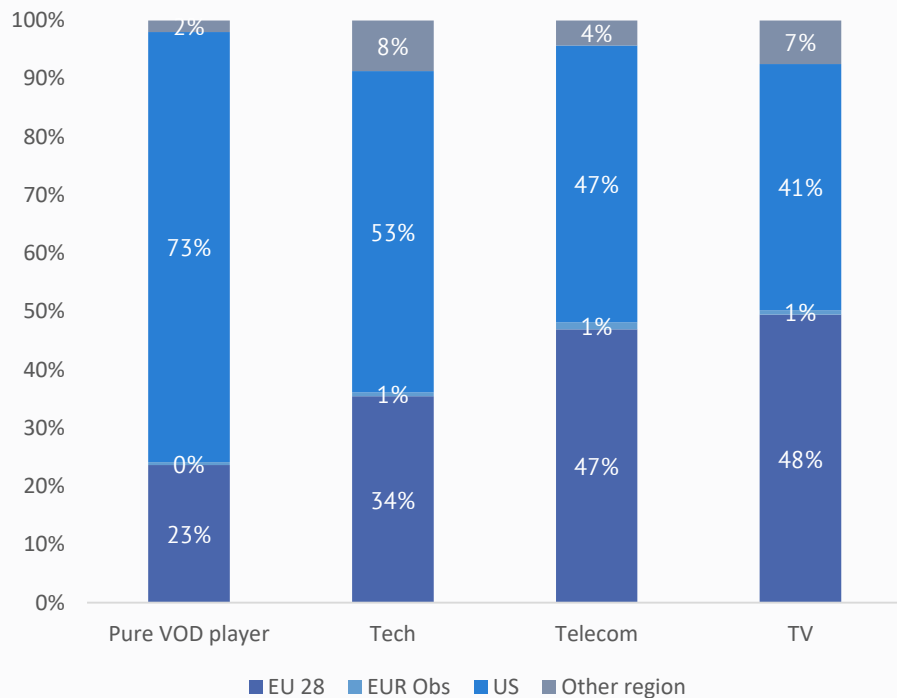
Core business	Number of TVOD catalogues	Average number of TV titles/catalogue	Number of SVOD catalogues	Average number of TV titles/catalogue
Distributor	0		2	88
Pure VOD player	7	120	32	773
Tech	33	687	24	350
Telecom	6	167	10	197
TV	7	485	50	213

Source: JustWatch catalogue data

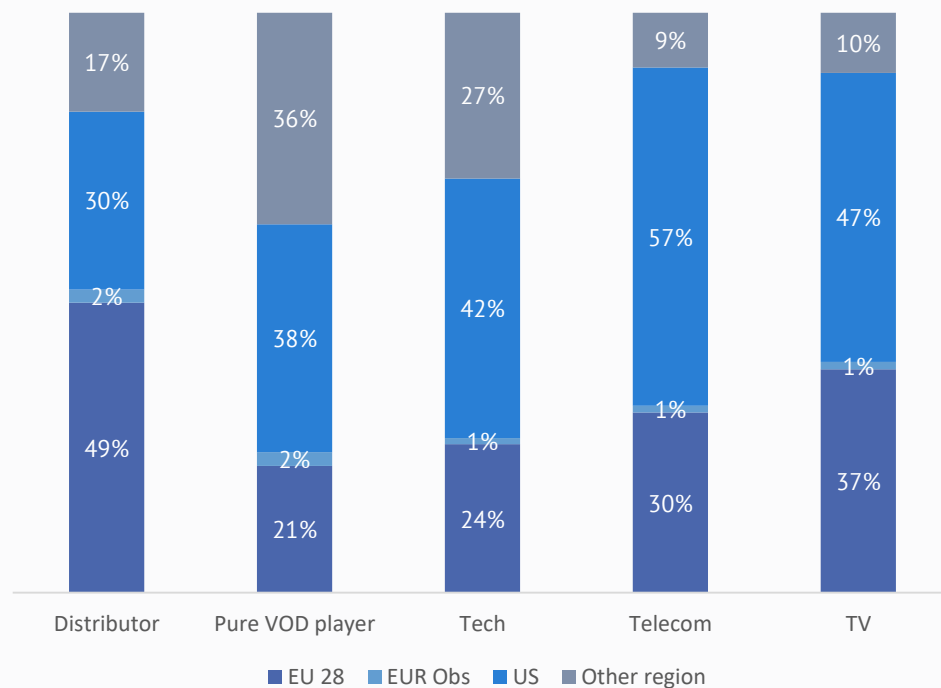
Sharp differences in the composition of catalogues by core business of service owners

- ▶ Pure VOD players: TVOD majority of US contents; SVOD one third of Other origin contents (more than EU)
- ▶ Distributor SVOD services, TV TVOD and Telecom TVOD have almost 50% of European contents

TVOD – Share of TV titles by core business and region



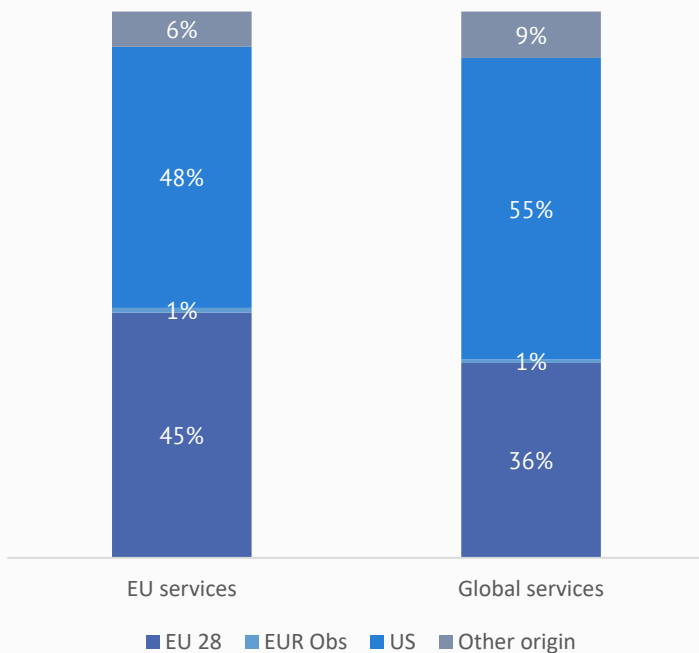
SVOD – Share of TV titles by core business and region



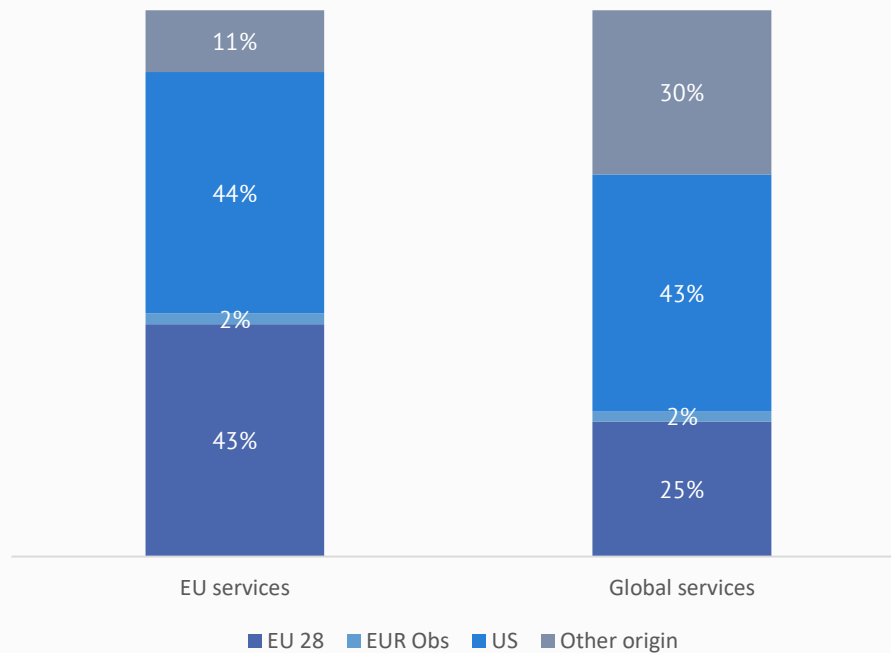
Higher share of EU TV contents for EU owned services...

- ▶ The share of EU titles in the catalogues of EU owned services is similar in TVOD (45%) and SVOD (43%)
- ▶ On global SVOD services we find the highest share of Other origin TV contents (30%)

TVOD – Share of TV titles by origin of service owner



SVOD – Share of TV titles by origin of service owner



Source: JustWatch catalogue data

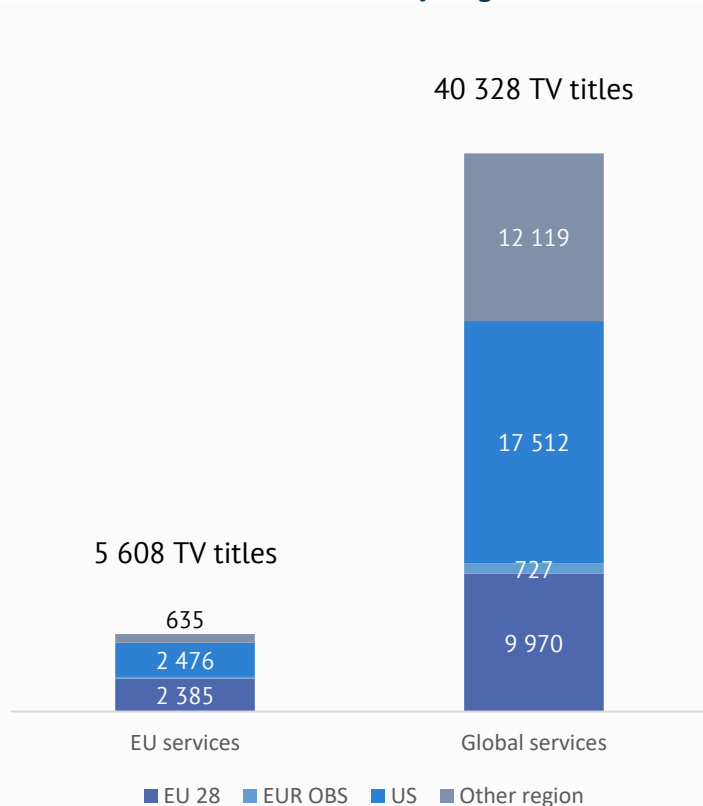
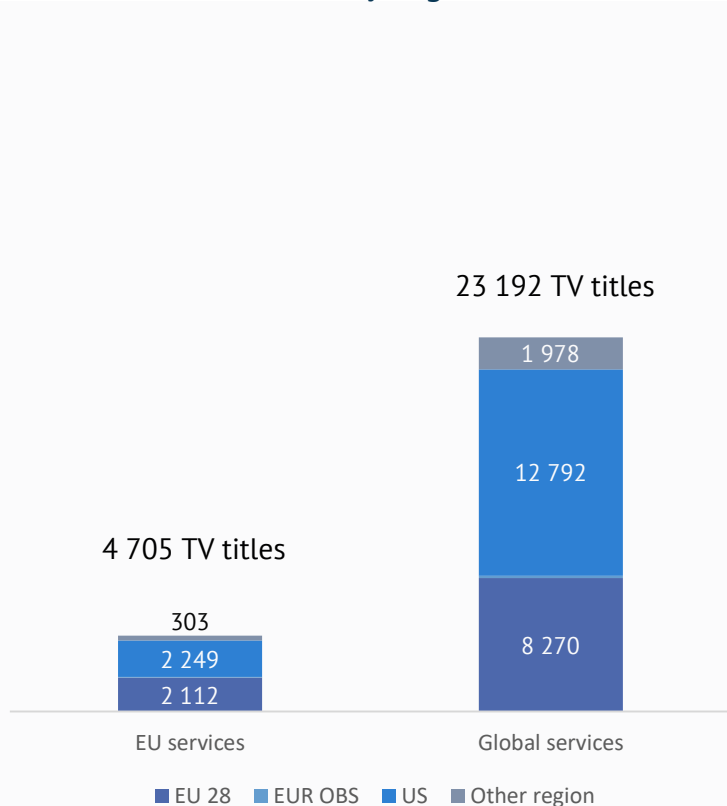
Origin of service owner	Number of TVOD catalogues	Average number of TV titles/catalogue	Number of SVOD catalogues	Average number of TV titles /catalogue
EU	18	261	31	181
non-EU	35	663	87	464

But the total offer of EU TV contents is higher for global owned services

- ▶ From an absolute numbers point of view, **global services offer more TV titles** and thus also **more EU films than EU owned services**

TVOD – Number of TV titles by origin of service owner

SVOD – Number of TV titles by origin of service owner



Source: JustWatch catalogue data

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

TV content is analysed in **cumulated number of titles, seasons and episodes**

TVOD services acquire more local content, while SVOD services build on European non-national TV contents

- ▶ More than half of TV titles, seasons and episodes on TVOD catalogues are of **national origin**
- ▶ On SVOD catalogues, large majority of EU non-national titles, seasons and episodes
- ▶ European national titles count proportionally more episodes than European non-national

Multi-country TVOD services build on local content

- ▶ National TV episodes represent almost three fifths of the offer in 40 multi-country TVOD services

National TVOD services rely on European TV contents from the rest of Europe rather than on national

- ▶ Almost two thirds of titles are of European non-national origin in 13 national TVOD services

Multi-country SVOD services offer very few local TV contents

- ▶ More than 80% of EU non-national titles, seasons and episodes are found on 99 multi-country SVOD services

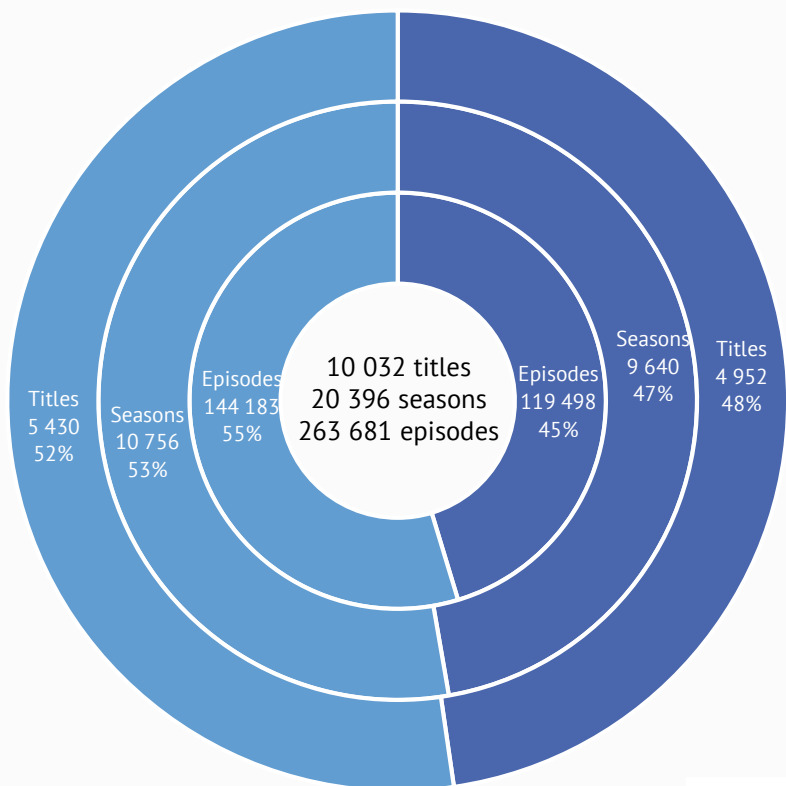
National SVOD services have an almost 50-50 split between local and European non-national TV contents

- ▶ Most of 19 national SVOD services are quite small (median of 136 titles, 215 seasons and 2 677 episodes)

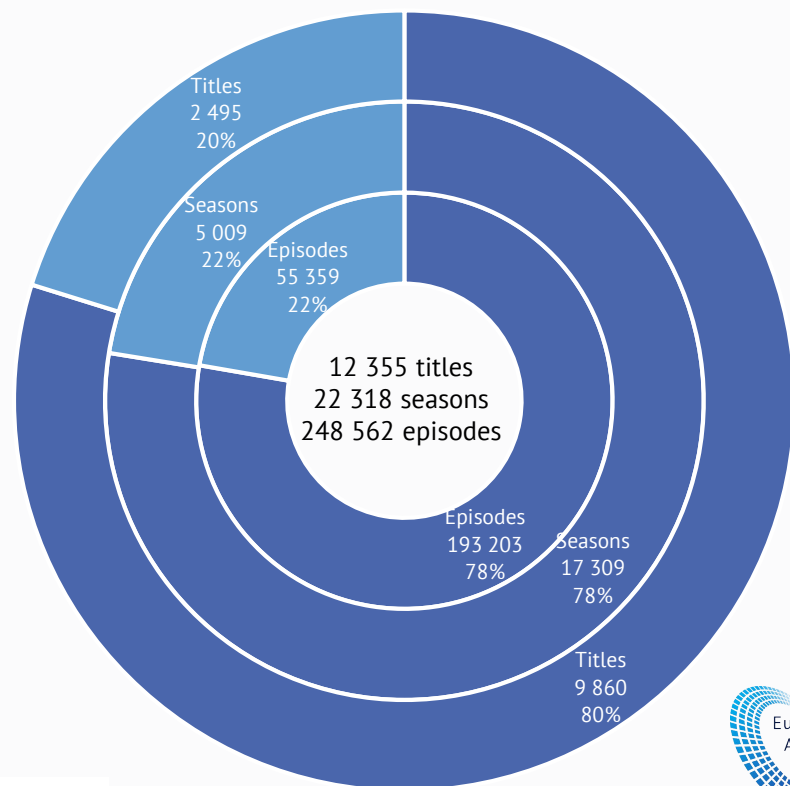
More national TV contents on TVOD, EU non-national dominance on SVOD

- ▶ More than half of TV titles, seasons and episodes on **53 TVOD** catalogues are of **national** origin
- ▶ On **118 SVOD** catalogues, large majority of **EU non-national** titles, seasons and episodes
- ▶ EU national titles count proportionally more episodes than EU non-national

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



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



■ EU non-national ■ National

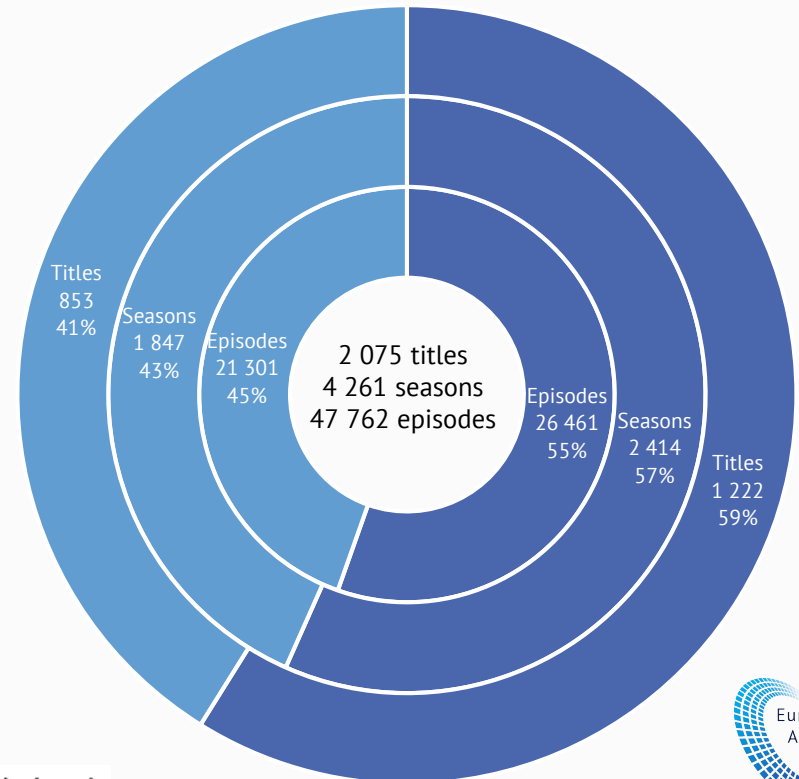
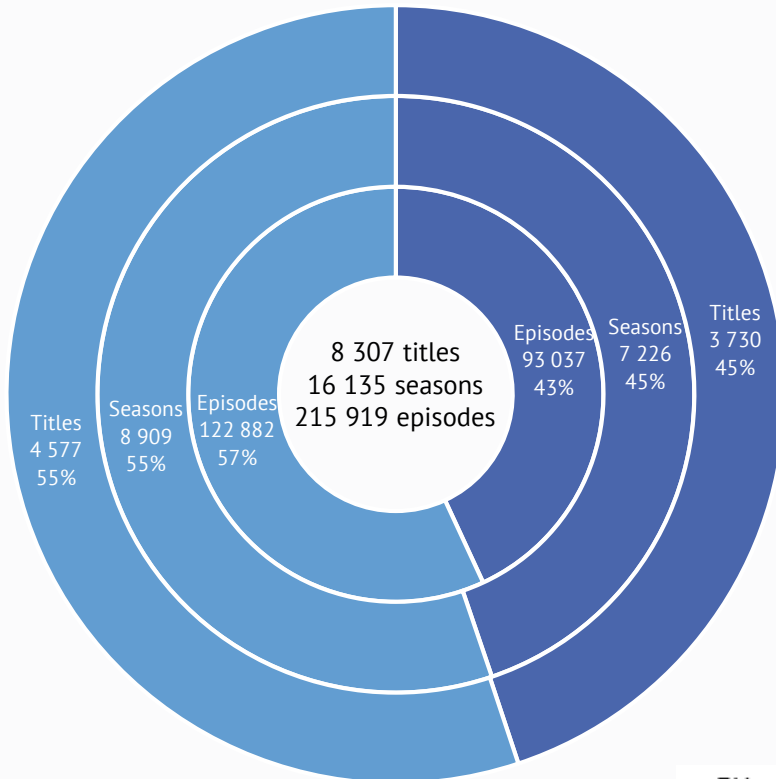
Source: JustWatch catalogue data

TVOD: multi-country services build on local content; national TVOD on rest of Europe

- ▶ National TV episodes represent almost three fifths of the offer in 40 multi-country TVOD services
- ▶ Inverse situation for 13 national TVOD services, which rely relatively less on national TV contents

TVOD multi-country services - EU non-national vs. national TV contents

TVOD national services - EU non-national vs. national TV contents



■ EU non-national ■ National

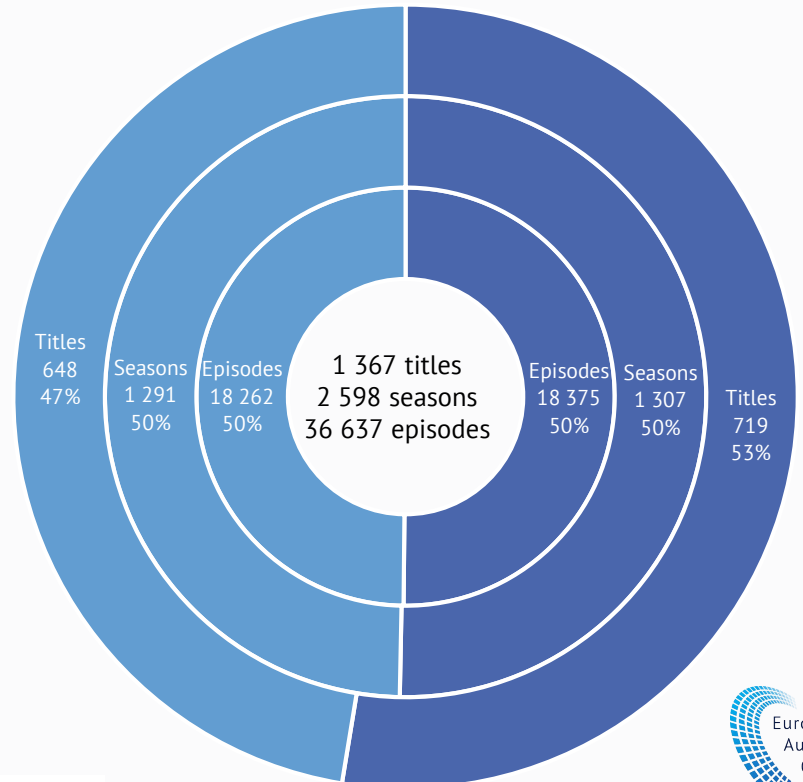
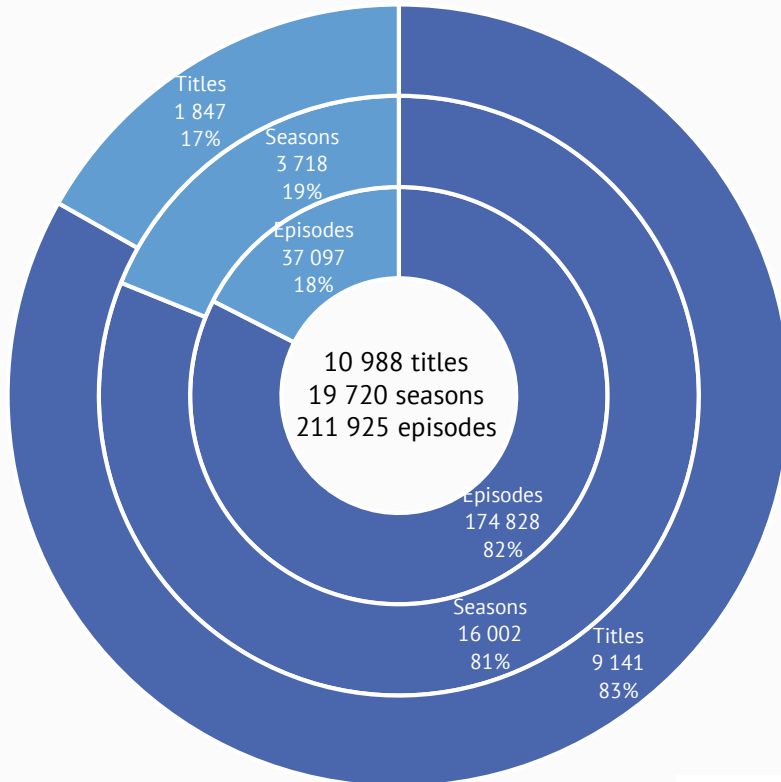
Source: JustWatch catalogue data

SVOD: multi-country services almost no local content; national services show 50-50

- ▶ 99 multi-country SVOD services rely almost solely on EU non-national to fill their TV catalogues
- ▶ 19 national SVOD services show a 50-50 split between national and European non-national contents

SVOD multi-country services - EU non-national vs. national TV contents

SVOD national services - EU non-national vs. national TV contents



■ EU non-national ■ National

Source: JustWatch catalogue data

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

TV content is analysed in **cumulated number of titles, seasons and episodes, focusing on European non-national**

The **United Kingdom is the strongest European exporter of TV contents on VOD in Europe (short high-end series)**

- ▶ On TVOD, 48% of titles, 49% of seasons and **40%** of episodes are from UK. National services more German
- ▶ On SVOD, 55% of titles, 58% of seasons and **48%** of episodes are from UK. More German episodes on national

On TVOD, **Germany is the second best European exporter of TV titles, seasons and mainly episodes (23%)**

- ▶ On TVOD, the UK, Germany and France represent over 75% of exported titles, seasons and episodes
- ▶ Sweden exports more titles and seasons than Italy and Spain (the latter coming only in 9th position)
- ▶ Proportionally, Germany and France export more TV Episodes per title than the UK
- ▶ Austria comes 4th in share of exported episodes, mainly related to cultural interaction with Germany
- ▶ High-end series dominate **Top 20** on TVOD, with 45% of UK origin and 15% from Nordics, Ireland or France

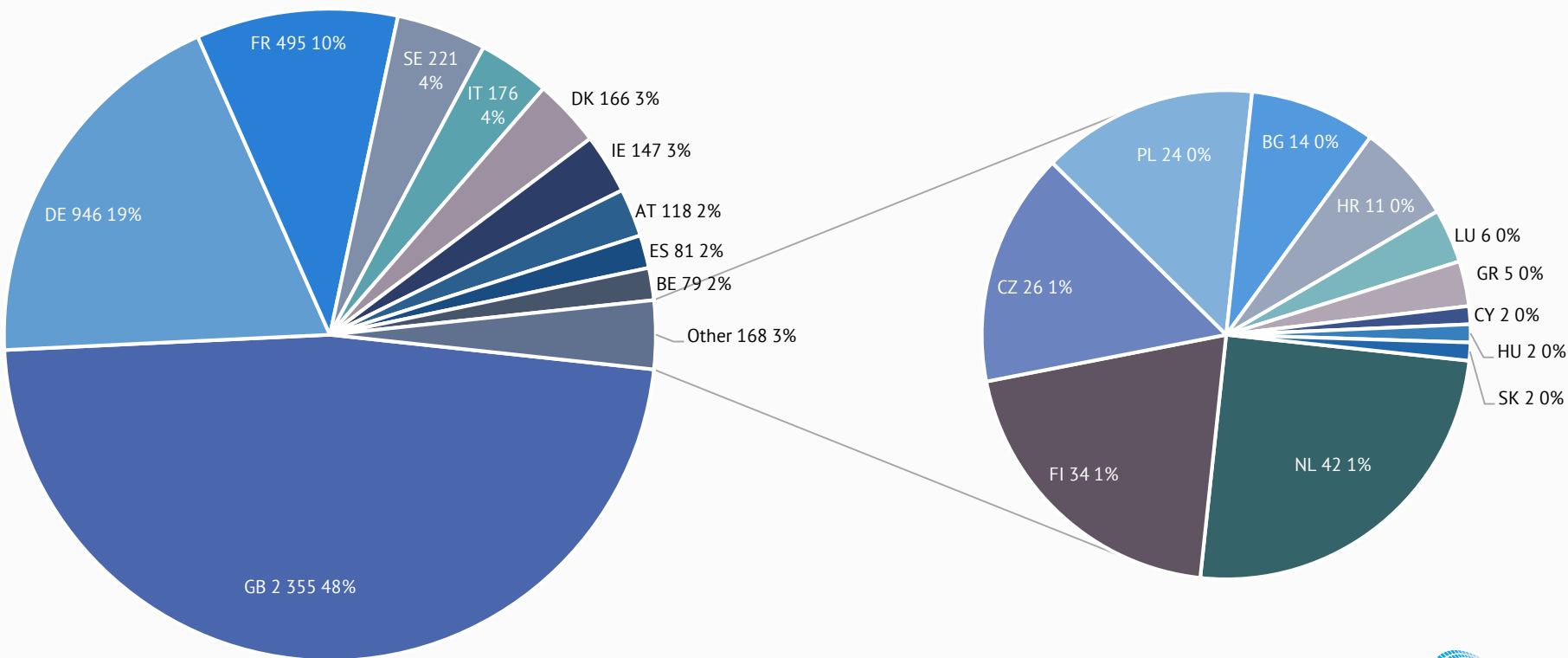
On SVOD, **France is the second best European exporter of TV titles, seasons and episodes (17%)**

- ▶ On TVOD, the UK, Germany and France represent over 75% of exported titles, seasons and episodes
- ▶ The five European countries with higher production capacity provide 88% of exported titles
- ▶ Three out of five European seasons on SVOD are of UK origin: long-running classic oldies
- ▶ Nordics (SE, DK, FI) and smaller countries (BE, IE, NL) are also important European exporters on SVOD
- ▶ On 19 national SVOD services there are almost double episodes from Germany (47%) than from the UK (26%)
- ▶ **Animation** dominates **Top 20** on SVOD, with 45% of UK origin, 20% from France and 15% from Nordics
- ▶ Excluding animation, **Top 20** on SVOD marks dominance of UK origin (65%)

TVOD: UK is the strongest European exporter of TV titles, Germany comes second

- ▶ The majority (77%) of exported titles are from the United Kingdom, Germany or France
- ▶ Sweden performs better than Italy and Spain (the latter coming only in 9th position)

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

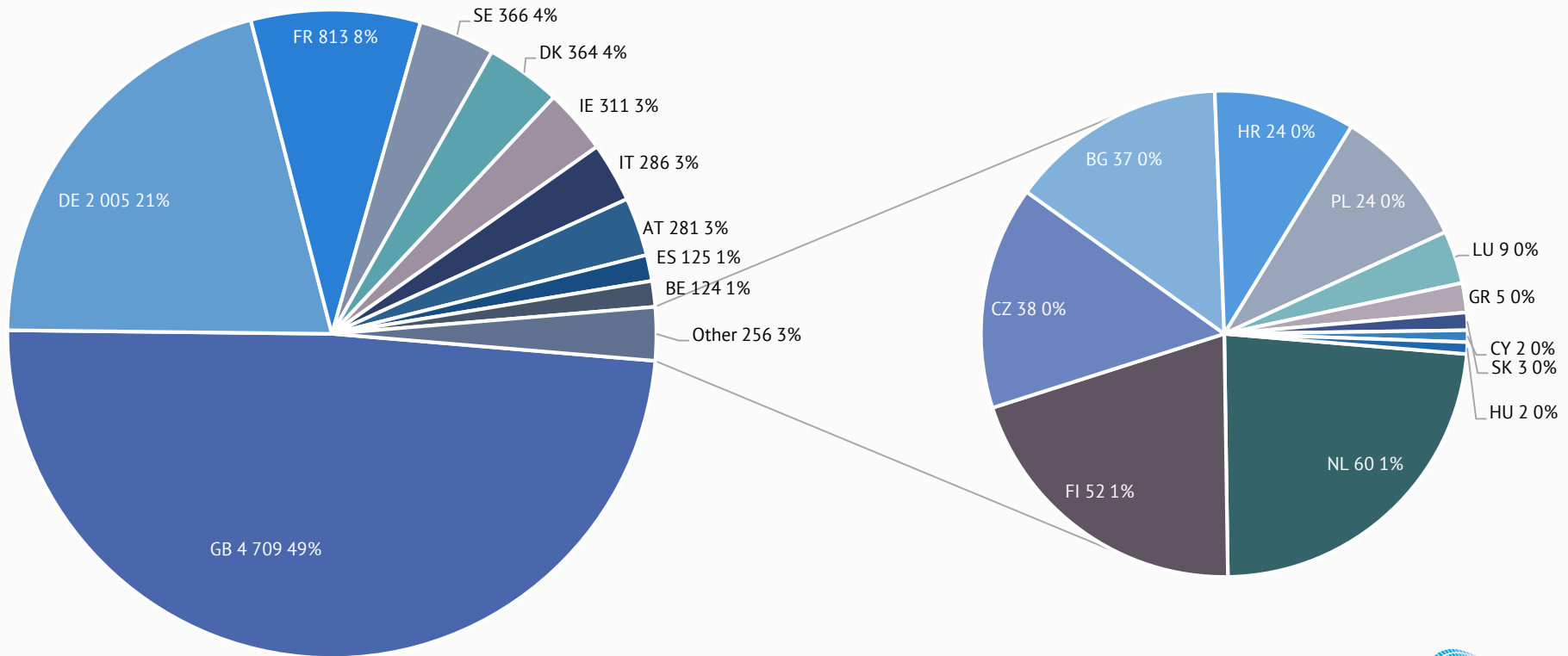


Source: JustWatch catalogue data

TVOD: UK also exports the most TV seasons, again followed by Germany, France

- ▶ Almost four in five exported seasons (78%) come from the UK, Germany or France
- ▶ In seasons, Sweden, Denmark and Ireland perform better than Italy and Spain

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

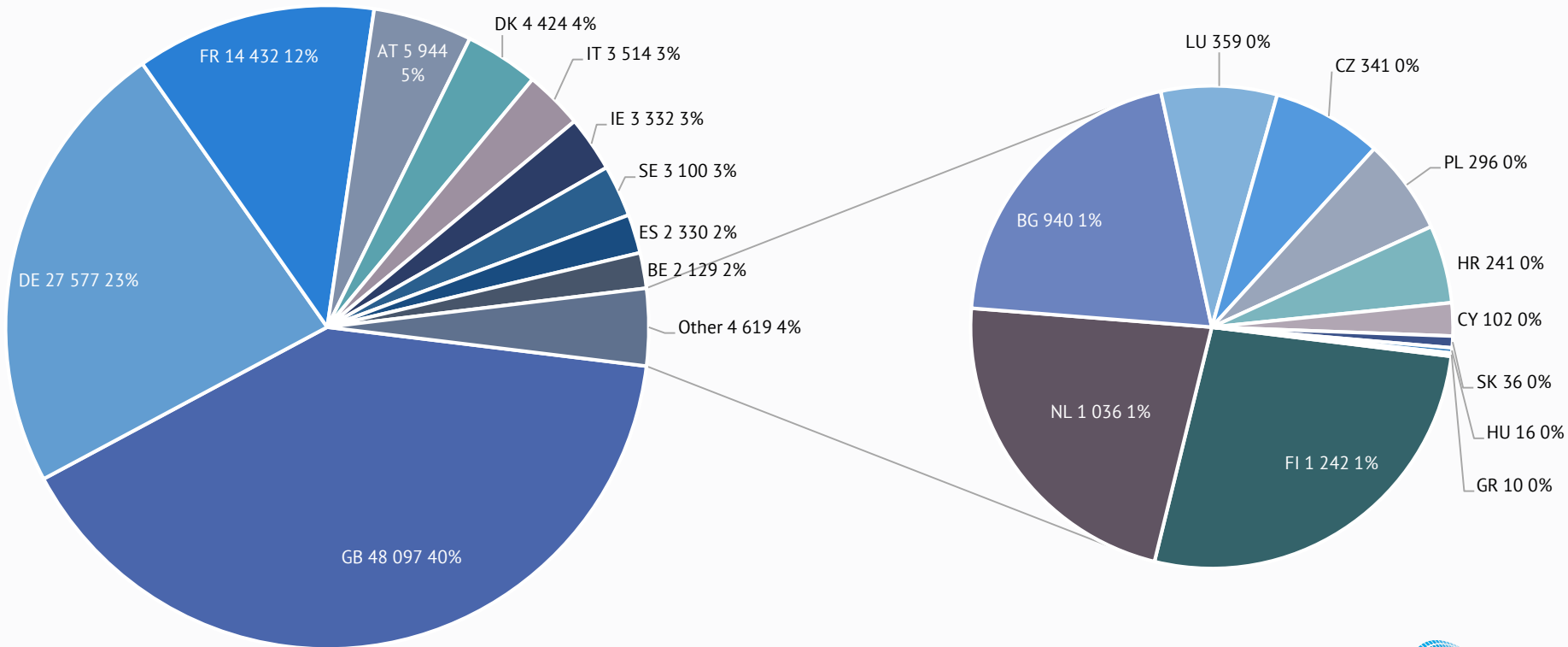


Source: JustWatch catalogue data

TVOD: proportionally, Germany and France export more TV episodes per title

- ▶ The UK with 48% of titles, represents 40% of episodes (production of high-end series: 3 to 13 eps)
- ▶ Germany, by opposition represents 23% of episodes with 19% of titles (more soaps produced)
- ▶ Austria comes 4th in share of exported episodes, related to cultural closeness and DE-AT co-prods

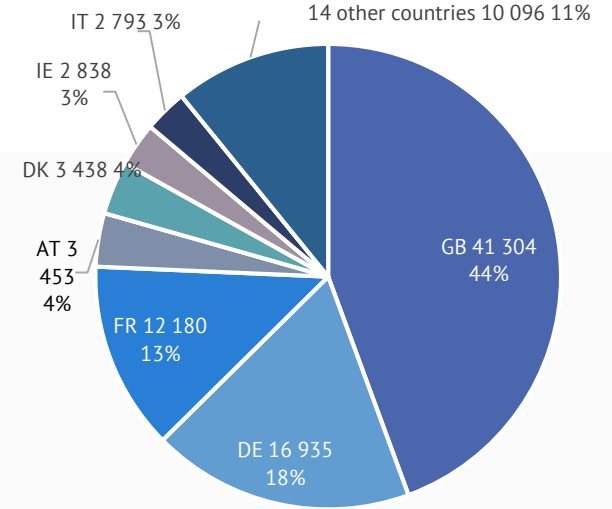
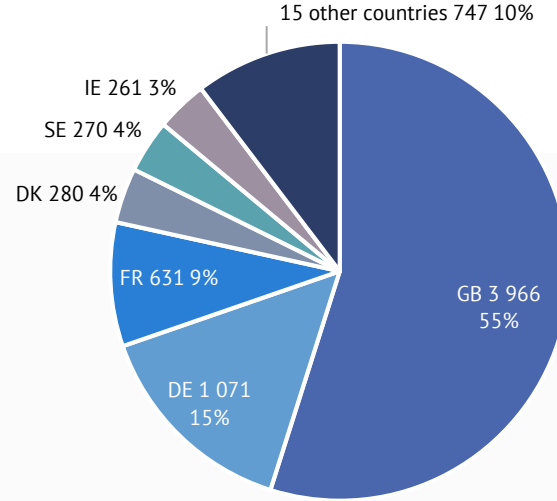
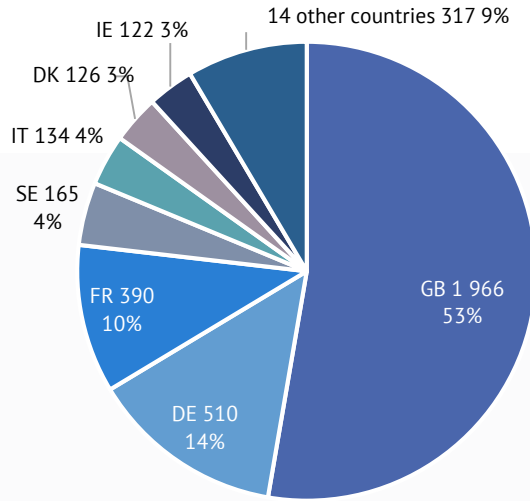
TVOD – Number of EU TV episodes exported outside of their national market by country of origin



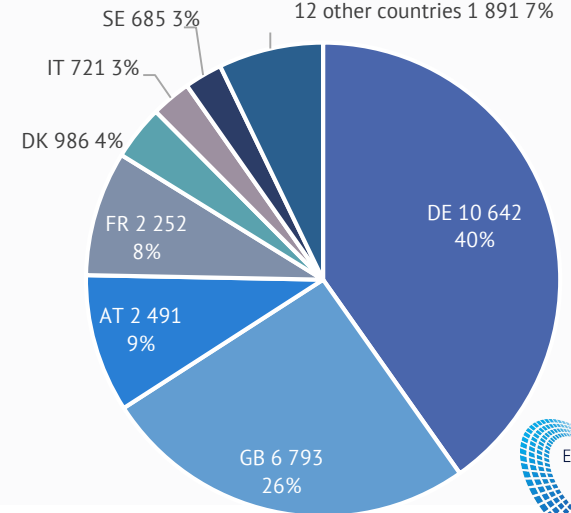
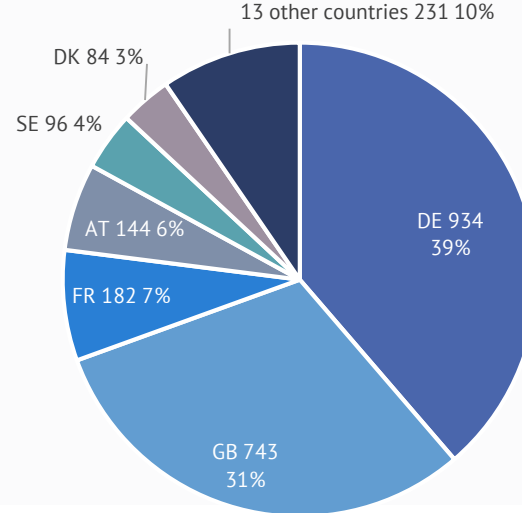
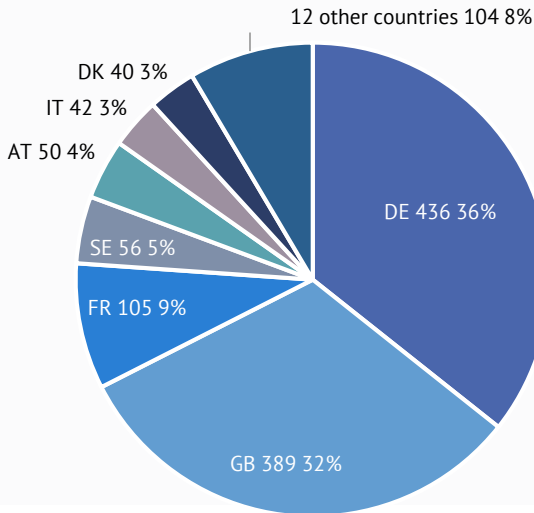
Source: JustWatch catalogue data

TVOD: multi-country building on UK contents, national on DE, UK contents

Export of EU Titles / Seasons / Episodes in 40 multi-country TVOD catalogues



Export of EU Titles / Seasons / Episodes in 13 national TVOD catalogues



Source: JustWatch catalogue data

How many unique TV titles are exported and present on average on TVOD services?

- ▶ Bulgarian TV titles circulated the best (with only 2 TV titles), followed by Finnish, Irish and Danish titles
- ▶ Titles from smaller film producing countries have also a high service circulation for a small number of titles: **multi-country services effect**
- ▶ Heavy exporters such as the UK and Germany have a lower circulation than many other countries but with much more titles exported

TVOD – Number of unique EU TV titles exported outside of their country of origin and average service presence



Source:
JustWatch
catalogue data

Top European TV titles exported on TVOD in Europe

▶ **High-end series dominate** Top 20 on TVOD, with 45% of UK origin and 15% from Nordics, IE or FR

Top 20 EU 28 non-national export TV scripted titles on TVOD, in number of catalogues and countries of availability

Original title	Production country	Year (1)	Format	Number of catalogues	Number of countries
Rome	GB,US	2005	3 to 13	25	8
Strike Back	GB	2010	3 to 13	25	8
Doctor Who	GB	1963	26 to 52	25	5
The Tudors	IE,CA,US,GB	2007	3 to 13	23	7
Gomorra - La serie	IT,DE	2014	3 to 13	21	5
Prison Break	GB,US	2005	3 to 13	18	6
LEGO Ninjago: Masters of Spinjitzu	DK,SG,CA,US	2011	3 to 13	17	7
Bron/Broen	SE,DK,DE	2011	3 to 13	16	5
Taken	FR,US	2017	3 to 13	16	5
Downton Abbey	GB	2010	3 to 13	15	4
Fortitude	GB	2015	3 to 13	14	7
Ennemi public	BE	2016	3 to 13	14	5
Forbrydelsen	DK,NO,SE,DE	2007	3 to 13	14	5
Top of the Lake	GB,AU,NZ,US	2013	3 to 13	14	5
Broadchurch	GB	2013	3 to 13	14	4
The Fall	IE	2013	3 to 13	14	4
Vikings	IE,CA	2013	3 to 26 (2)	14	4
Luther	GB	2010	3 to 13	13	5
Les témoins	FR,BE	2014	3 to 13	13	4
Versailles	FR,CA	2015	3 to 13	13	3

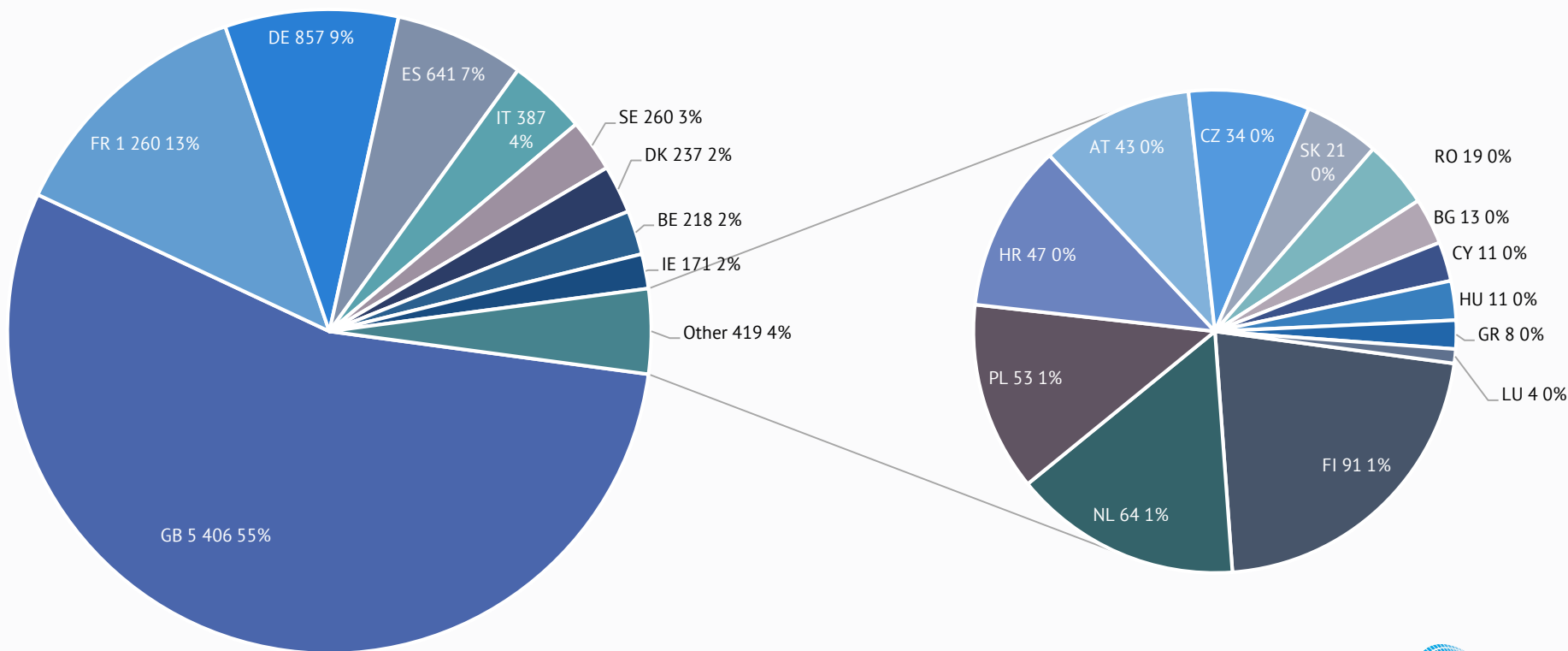
(1) Production year for season 1

(2) Seasons 1 to 3, 10 episodes; seasons 4 to 6, 20 episodes

SVOD: UK is the strongest European exporter of TV titles, France comes second

- ▶ The five European countries with higher production capacity provide 88% of exported titles
- ▶ Scandinavian (SE, DK, FI) and smaller countries (BE, IE, NL) are important exporters on SVOD

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

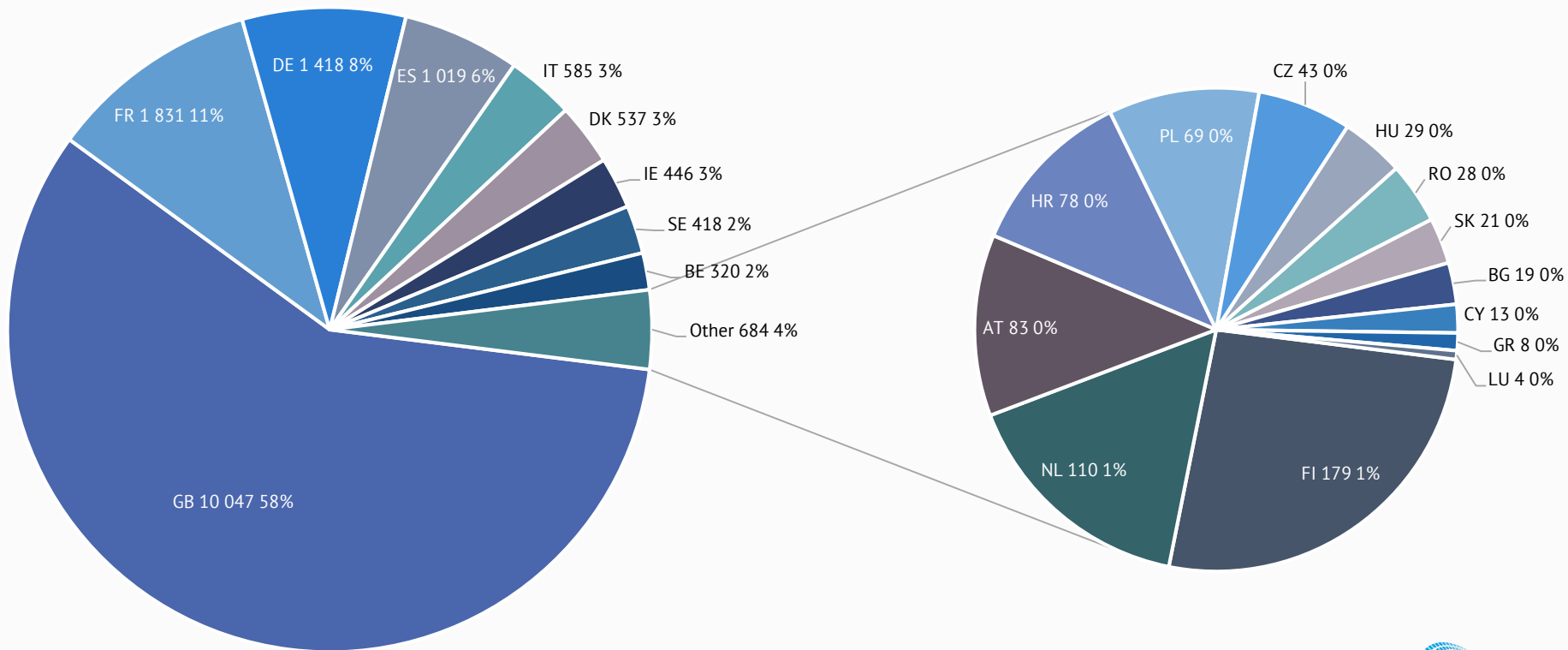


Source: JustWatch catalogue data

SVOD: dominance of UK TV seasons, majority from 5 main production countries

- ▶ Three out of five European seasons on SVOD are of UK origin: long-running classic oldies
- ▶ The five countries with higher production capacity provide 86% of all exported seasons on SVOD

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

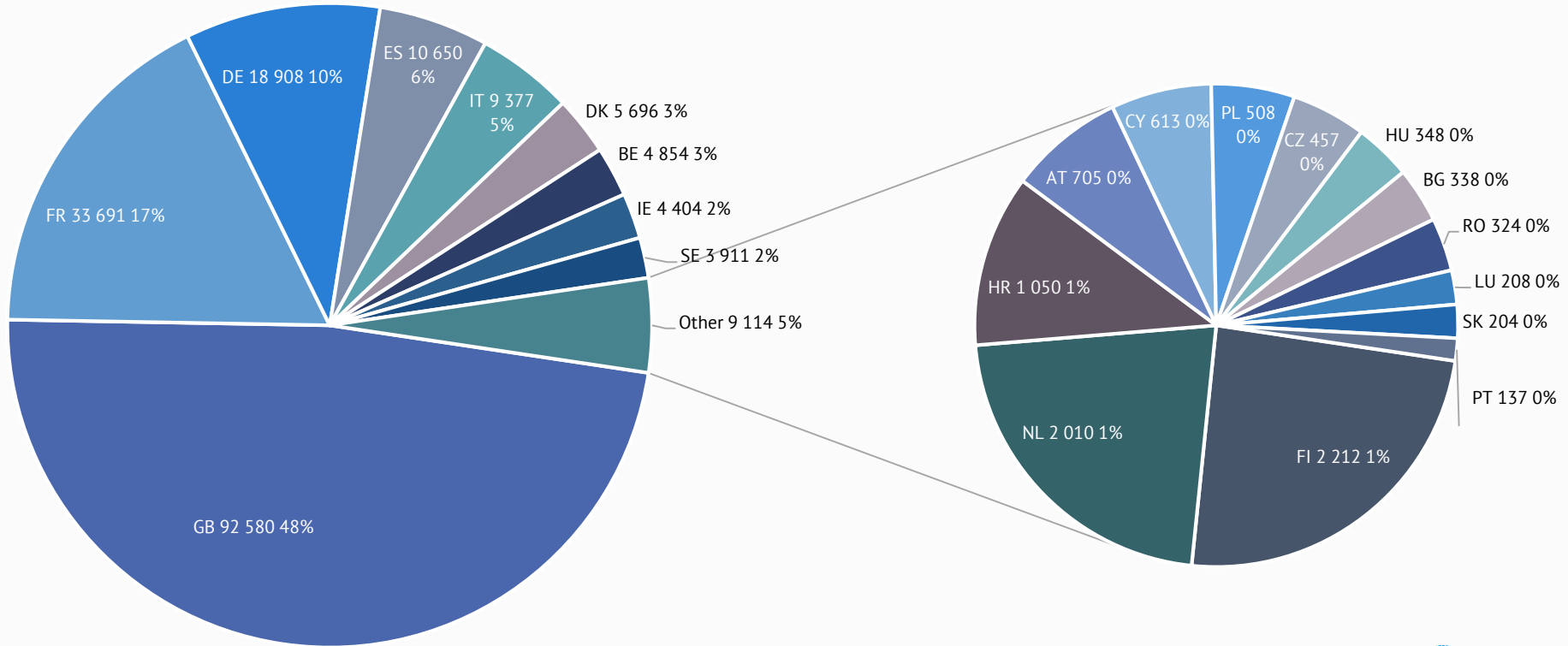


Source: JustWatch catalogue data

SVOD: UK main provider, important presence of French TV Episodes in Europe

- ▶ UK TV titles count proportionally less episodes per season on SVDO than French or German titles
- ▶ French, German and Italian TV content producers export more episodes per title

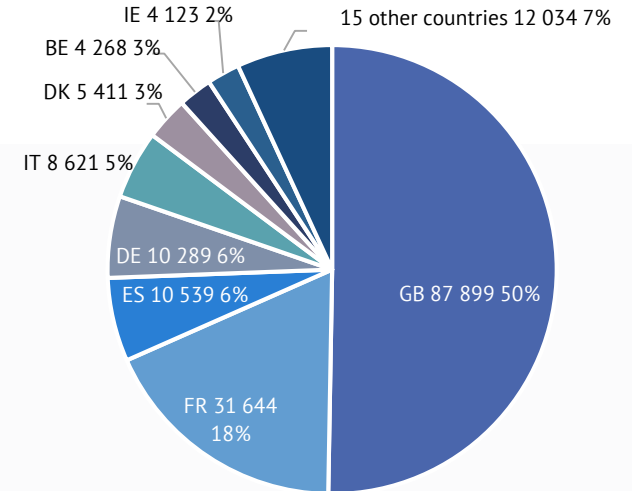
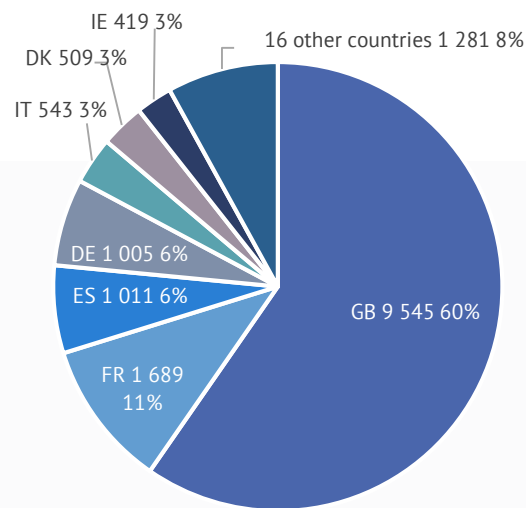
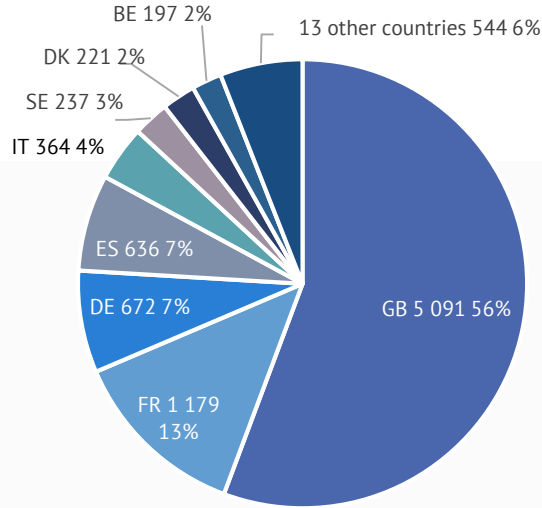
SVOD – Number of EU TV episodes exported outside of their national market by country of origin



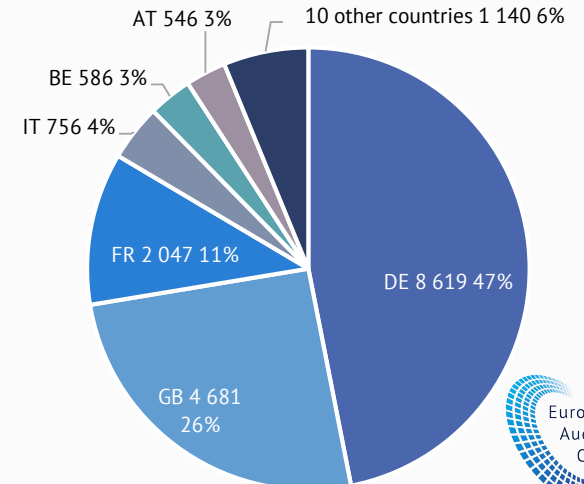
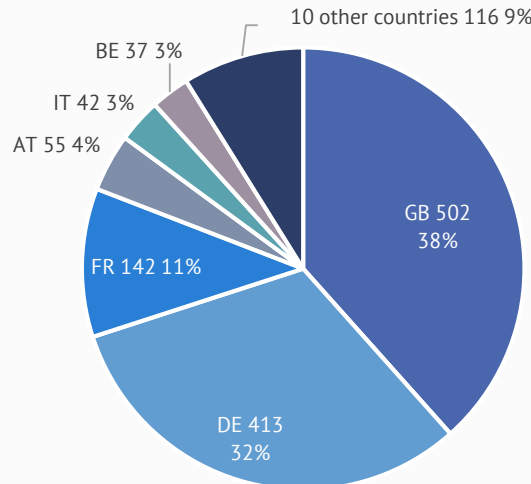
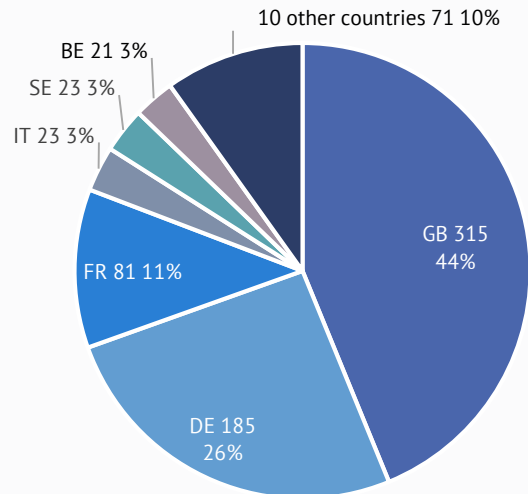
Source: JustWatch catalogue data

SVOD: exports on multi-country are of UK, FR, ES origin – On national, DE episodes

Export of EU Titles / Seasons / Episodes in 99 multi-country SVOD catalogues



Export of EU Titles / Seasons / Episodes in 19 national SVOD catalogues

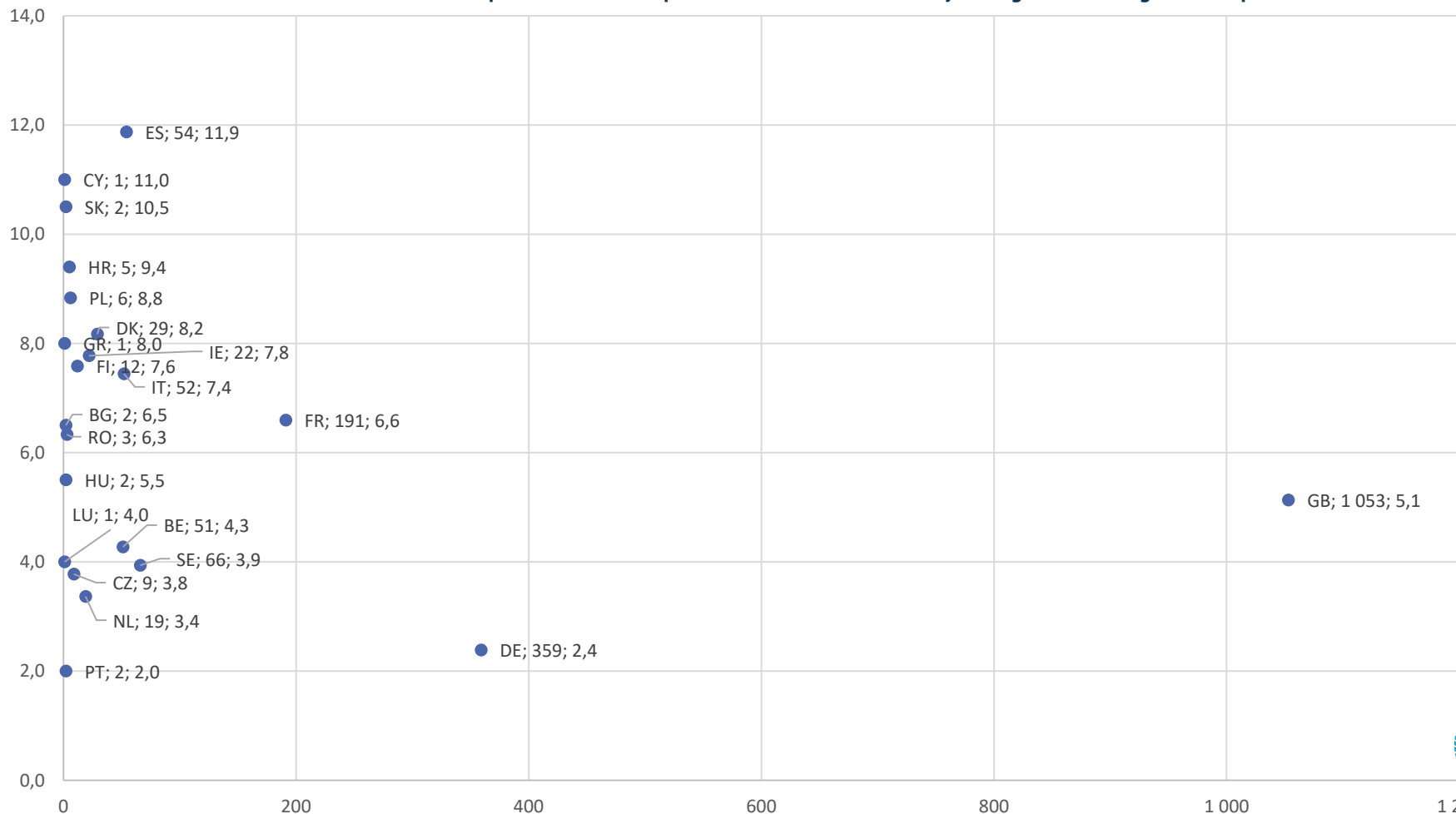


Source: JustWatch catalogue data

How many unique TV titles are exported and present on average on SVOD services?

- ▶ Spanish titles circulated the best, even with an extremely lower number of titles, followed by Cypriot and Slovak titles
- ▶ Titles from smaller film producing countries have also a high service circulation for a small number of titles: **multi-country services effect**
- ▶ Heavy exporters such as the UK and Germany have a lower circulation than many other countries but with much more titles exported

SVOD – Number of unique EU TV titles exported outside of their country of origin and average service presence



Source:
JustWatch
catalogue data

Top European TV titles exported on SVOD in Europe

- ▶ **Animation dominates** Top 20 on SVOD, with 45% of UK origin, 20% from FR and 15% from Nordics

Top 20 EU 28 non-national export TV scripted titles on SVOD, in number of catalogues and countries of availability

Original title	Production country	Year (1)	Format	Number of catalogues	Number of countries
Peppa Pig	GB	2004	26 to 52	62	20
LEGO Ninjago: Masters of Spinjitzu	DK,US	2011	3 to 13	52	20
Fireman Sam	GB	1987	14 to 26	49	20
PJ Masks	FR,GB	2015	14 to 26	44	19
Shaun the Sheep	GB	2007	26 to 52	44	18
LEGO Nexo Knights	DK	2015	3 to 13	42	20
Oddbods	GB,SG	2016	More than 52	40	20
Wolfblood	GB	2012	3 to 13	39	19
Top Boy	GB	2011	3 to 13	38	19
Pocoyo	ES,GB	2005	26 to 52	36	17
Angry Birds Toons	FI	2013	26 to 52	35	19
Danger Mouse	GB	1981	3 to 13	35	19
Grizzy et les Lemmings	FR	2017	26 to 52	35	19
Molang	FR	2015	26 to 52	35	19
Ben and Holly's Little Kingdom	GB	2009	26 to 52	33	18
Timmy Time	GB	2009	26 to 52	33	19
Tip the Mouse	DE,US,IT	2014	26 to 52	32	16
Oggy et les Cafards	FR,CA,PH,VN,KR,US,GB	1998	More than 52	30	19
Vikings	IE,CA	2013	3 to 26 (2)	28	16
Winx Club	IT	2004	26 to 52	28	19

(1) Production year for season 1

(2) Seasons 1 to 3, 10 episodes; seasons 4 to 6, 20 episodes

Top European TV titles -excluding animation- exported on SVOD in Europe

- ▶ **Excluding animation**, Top 20 on SVOD marks dominance of UK origin (65%), high-end series

Top 20 EU 28 non-national export TV scripted titles excluding animation on SVOD, in number of catalogues and

Original title	Production country	Year (1)	Format	Number of catalogues	Number of countries
Wolfblood	GB	2012	3 to 13	39	19
Top Boy	GB	2011	3 to 13	38	19
Vikings	IE,CA	2013	3 to 26 (2)	28	16
Babylon	GB	2014	3 to 13	26	17
Peaky Blinders	GB	2013	3 to 13	26	19
Prison Break	GB,US	2005	3 to 13	26	19
Sept nains et moi	FR	2016	14 to 26	25	16
The Bletchley Circle	GB	2012	3 to 13	25	18
Deutschland 83	DE	2015	3 to 13	22	16
La Trêve	BE	2016	3 to 13	22	18
The IT Crowd	GB	2006	3 to 13	22	19
4 Blocks	DE	2017	3 to 13	21	18
Baby	IT	2018	3 to 13	21	19
Gomorra - La serie	IT	2014	3 to 13	21	15
Line of Duty	GB	2012	3 to 13	21	16
Monty Python's Flying Circus	GB	1969	3 to 13	21	19
Vexed	GB	2010	3 to 13	21	18
Derek	GB	2012	3 to 13	20	19
Derry Girls	GB	2018	3 to 13	20	19
Downton Abbey	GB	2010	3 to 13	20	18

(1) Production year for season 1

(2) Seasons 1 to 3, 10 episodes; seasons 4 to 6, 20 episodes

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	Name of service	Country	Number of TVOD catalogues
Aerovod CZ	Filmin TVOD ES	Microsoft Films & TV AT	UniversCiné Belgium BE	AT	14
Aerovod SK	Filmo TV FR	Microsoft Films & TV DE	Videobuster AT	BE	2
alles kino AT	Flimmit AT	Microsoft Films & TV DK	Videobuster DE	BG	1
alles kino DE	Flimmit DE	Microsoft Films & TV ES	VoD.lu LU	CY	1
Amazon TVOD AT	Google Play Movies AT	Microsoft Films & TV FI	Volta IE	CZ	8
Amazon TVOD DE	Google Play Movies CZ	Microsoft Films & TV FR	YouTube Movies DE	DE	15
Amazon TVOD GB	Google Play Movies DE	Microsoft Films & TV GB	YouTube Movies FR	DK	5
Atres Player ES	Google Play Movies DK	Microsoft Films & TV IE	YouTube Movies GB	EE	3
Banaxi CZ	Google Play Movies EE	Microsoft Films & TV IT	YouTube Movies PL	ES	7
Bbox VOD FR	Google Play Movies FI	Microsoft Films & TV NL	YouTube Movies PT	FI	5
Canal VOD FR	Google Play Movies GB	Microsoft Films & TV SE	ZMONES Cinema filmai LT	FR	13
Chili AT	Google Play Movies IE	MyTF1vod FR		GB	12
Chili DE	Google Play Movies IT	O2TV CZ		GR	1
Chili GB	Google Play Movies LT	Orange VOD FR		HR	1
Chili IT	Google Play Movies LV	Pantaflix AT		HU	1
Chili PL	Google Play Movies NL	Pantaflix DE		IE	7
Cineman PL	Google Play Movies PL	Pantaflix FR		IT	8
FilmDoo AT	Google Play Movies PT	Pantaflix GB		LT	4
FilmDoo BE	Google Play Movies SE	Pathé Thuis NL		LU	2
FilmDoo BG	Google Play Movies SK	Plejmo DK		LV	3
FilmDoo CY	Infinity TV IT	Plejmo FI		MT	1
FilmDoo CZ	iTunes AT	Plejmo SE		NL	6
FilmDoo DE	iTunes CZ	Prima Videopůjčovna CZ		PL	7
FilmDoo DK	iTunes DE	Rakuten TV CZ		PT	6
FilmDoo EE	iTunes DK	Rakuten TV IE		RO	1
FilmDoo ES	iTunes EE	Rakuten TV NL		SE	5
FilmDoo FI	iTunes ES	Rakuten TV PL		SI	1
FilmDoo FR	iTunes FI	Rakuten TV PT		SK	6
FilmDoo GB	iTunes FR	Rakuten TV SK			
FilmDoo GR	iTunes GB	RakutenTV AT			
FilmDoo HR	iTunes IE	RakutenTV DE			
FilmDoo HU	iTunes IT	RakutenTV ES			
FilmDoo IE	iTunes LT	RakutenTV FR			
FilmDoo IT	iTunes LV	RakutenTV GB			
FilmDoo LT	iTunes NL	RakutenTV IT			
FilmDoo LU	iTunes PL	Sky Store AT			
FilmDoo LV	iTunes PT	Sky Store DE			
FilmDoo MT	iTunes SE	Sky Store GB			
FilmDoo NL	iTunes SK	Sky Store IE			
FilmDoo PL	K2Studio SK	Sony Playstation Store DE			
FilmDoo PT	Kino VOD Club AT	Sony Playstation Store ES			
FilmDoo RO	LaCinetek FR	Sony Playstation Store FR			
FilmDoo SE	Maxdome Store AT	Sony Playstation Store GB			
FilmDoo SI	Maxdome Store DE	Sony Playstation Store IT			
FilmDoo SK	MEO PT	Talk Talk TV GB			

Source: JustWatch catalogue data

SVOD catalogues and countries in the film sample

Name of service	Name of service	Name of service
Amazon Prime Video BE	GuideDoc IE	Netflix DE
Amazon Prime Video CZ	GuideDoc IT	Netflix DK
Amazon Prime Video DE	GuideDoc LT	Netflix EE
Amazon Prime Video DK	GuideDoc LV	Netflix ES
Amazon Prime Video EE	GuideDoc NL	Netflix FI
Amazon Prime Video ES	GuideDoc PL	Netflix FR
Amazon Prime Video FI	GuideDoc SE	Netflix LT
Amazon Prime Video FR	HBO GO CZ	Netflix LV
Amazon Prime Video GB	HBO GO PL	Netflix NL
Amazon Prime Video IE	HBO Go PT	Netflix PL
Amazon Prime Video IT	HBO GO RO	Netflix PT
Amazon Prime Video LT	HBO GO SK	Netflix RO
Amazon Prime Video LV	HBO Nordic DK	Netflix SE
Amazon Prime Video NL	HBO Nordic FI	Netflix SK
Amazon Prime Video PL	HBO Nordic SE	Obbod CZ
Amazon Prime Video PT	Horizon/UJPC PL	Obbod SK
Amazon Prime Video SE	IPLA PL	OCS GO FR
Amazon Prime Video SK	Kividoo AT	Otta SK
Animax Plus Amazon Channel DE	Kividoo DE	SFR Play FR
Anime on Demand DE	Magio Kino SK	Shudder AT
Be2Can CZ	Maxdome AT	Shudder DE
Be2Can SK	Maxdome DE	Shudder GB
BFI Player GB	Mediaset Premium Play IT	Shudder IE
C More DK	Movistar+ ES	Sky GO AT
C More FI	MUBI AT	Sky GO DE
C More SE	MUBI CZ	Sky GO GB
Curzon Home Cinema GB	MUBI DE	Sky GO IE
DaFilms CZ	MUBI DK	Sky GO IT
DaFilms SK	MUBI EE	Sky Now TV GB
Disney Life GB	MUBI ES	Sky NOW TV IE
Disney Life IE	MUBI FI	Sky Now TV IT
Film1 NL	MUBI FR	Sky Ticket AT
Filmbox CZ	MUBI GB	Sky Ticket DE
Filmbox PL	MUBI IE	Starz Play Amazon Channel DE
Filmbox SK	MUBI IT	Starz Play GB
Filmin Plus ES	MUBI LT	TIMvision IT
Filmo TV SVOD FR	MUBI LV	Uncut Belgium BE
Filmpopular CZ	MUBI NL	UPC My Prime CZ
GuideDoc AT	MUBI PL	UPC My Prime PL
GuideDoc DE	MUBI PT	UPC My Prime SK
GuideDoc DK	MUBI SE	Viaplay DK
GuideDoc EE	MUBI SK	Viaplay FI
GuideDoc ES	Netflix AT	Viaplay SE
GuideDoc FI	Netflix BE	Videoland NL
GuideDoc GB	Netflix CZ	Voyo CZ and SK

Country	Number of SVOD catalogues
AT	8
BE	3
CZ	11
DE	12
DK	7
EE	4
ES	6
FI	7
FR	6
GB	10
IE	7
IT	7
LT	4
LV	4
NL	6
PL	9
PT	4
RO	2
SE	7
SK	12

Source: JustWatch catalogue data

TVOD catalogues and countries in the TV sample

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

Country	Number of TVOD catalogues
AT	8
BE	1
CZ	1
DE	10
DK	1
ES	3
FI	1
FR	9
GB	9
IE	3
IT	4
NL	1
PL	1
SE	1

Source: JustWatch catalogue data

SVOD catalogues and countries in the TV sample

Name of service	Name of service	Name of service	Name of service
Acorn TV DK	C More SE	Netflix DK	Shudder DE
Acorn TV NL	Disney Life GB	Netflix EE	Shudder GB
Acorn TV SE	Disney Life IE	Netflix ES	Shudder IE
Amazon Prime Video AT	Disney Plus NL	Netflix FI	Sky ES
Amazon Prime Video BE	Filmin Plus ES	Netflix FR	Sky GO AT
Amazon Prime Video CZ	Fox Play PT	Netflix GB	Sky GO DE
Amazon Prime Video DE	Fubo TV ES	Netflix HU	Sky GO GB
Amazon Prime Video DK	HBO ES	Netflix IE	Sky GO IE
Amazon Prime Video EE	HBO GO CZ	Netflix IT	Sky GO IT
Amazon Prime Video ES	HBO GO HU	Netflix Kids AT	Sky Now TV GB
Amazon Prime Video FI	HBO GO PL	Netflix Kids DE	Sky Now TV IE
Amazon Prime Video FR	HBO Go PT	Netflix Kids DK	Sky Now TV IT
Amazon Prime Video GB	HBO GO RO	Netflix Kids EE	Sky Online DE
Amazon Prime Video HU	HBO Nordic DK	Netflix Kids GB	Sky X AT
Amazon Prime Video IE	HBO Nordic FI	Netflix Kids IE	Starz Play Amazon Channel DE
Amazon Prime Video IT	HBO Nordic SE	Netflix Kids LT	Starz Play Amazon Channel GB
Amazon Prime Video LT	Horizon/UPC HU	Netflix Kids LV	TIMvision IT
Amazon Prime Video LV	Horizon/UPC PL	Netflix Kids NL	TVNOW DE
Amazon Prime Video NL	Horizon/UPC RO	Netflix Kids SE	Viaplay DK
Amazon Prime Video PL	ITV GB	Netflix LT	Viaplay EE
Amazon Prime Video PT	JOYN DE	Netflix LV	Viaplay FI
Amazon Prime Video RO	Kividoo AT	Netflix NL	Viaplay LT
Amazon Prime Video SE	Kividoo DE	Netflix PL	Viaplay LV
Amazon Prime Video SK	Maxdome AT	Netflix PT	Viaplay SE
Animax Plus Amazon Channel DE	Maxdome DE	Netflix RO	Videoland NL
Anime on Demand DE	Movistar+ ES	Netflix SE	Vodafone ES
Atresplayer ES	Netflix AT	OCS GO FR	Yelo Play BE
Be tv BE	Netflix BE	Ruutu FI	Ziggo NL
C More DK	Netflix CZ	SFR Play FR	
C More FI	Netflix DE	Shudder AT	

Country	Number of SVOD catalogues
AT	8
BE	4
CZ	3
DE	13
DK	7
EE	4
ES	9
FI	6
FR	4
GB	9
HU	4
IE	7
IT	5
LT	4
LV	4
NL	7
PL	4
PT	4
RO	4
SE	7
SK	1

Source: JustWatch catalogue data

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