



Films in VOD catalogues

Origin, Circulation and Age

Edition 2018

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Edition 2018

Christian Grece



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Short executive summary

On the data in this report

- Averages on the origin of films should not be considered as reflecting the whole picture. Strong differences between VOD services, countries and even catalogues of the same VOD service exist.
- Therefore, the average share of EU films, in TVOD and SVOD catalogues, gives only a partial picture of VOD catalogues and the actual share of EU films must be assessed on an individual catalogue basis for each service.
- The shares of films by region of origin are only true at the collection date. Various catalogues have changed in the composition of films since the data were collected (December 2017 and May/June 2018, October 2017 for Netflix). Therefore, actual shares at the date of publication of this report might differ from the data in this report.

Main findings

The share of unique EU film titles is both for TVOD and SVOD services significantly higher than the volume of EU films in VOD catalogues. This comes from the fact that EU film titles circulate less (on average, in 2.7 countries on TVOD and 2.5 countries on SVOD), in countries and on VOD services. For all other regions of origin, and mainly for US film titles (6 countries on average on TVOD, 4.8 on SVOD), the contrary is true; the volume of films is higher than the actual share of unique film titles, titles of these regions of origin circulate better on VOD services and cross borders more easily.

The reasons for the lower circulation of EU film titles are numerous: different languages, lack of a theatrical release or film promotion in a given country, cultural distance but also the variety and volume of EU films, with specialised art house and niche VOD services offering films which are not found in the catalogues of more mainstream VOD services.

For both TVOD and SVOD services, the share of EU films was higher in national VOD services than for multi-country VOD services. National VOD services tended also to offer more national but also more EU non-national films, and the proportion of national films in EU films was significantly higher for national VOD services. Also, VOD services in bigger film volume producing countries (such as France, the United Kingdom, Germany, Spain and Italy) tended to have a higher share of national films, in the case of national

but also multi-country VOD services. On TVOD services, films of these 5 countries accounted for 77% of all EU films available and on SVOD for 74%.

The catalogues of VOD services, while offering film produced in a large number of production countries (on average, 64 different production countries for TVOD services, 54 for SVOD services with multi-country VOD services offering the most films of different origins), tend also to be concentrated with the top 3 production countries accounting on average for 69% of all films on TVOD services and 68% of all films on SVOD services. Multi-country VOD services had also the bigger film catalogues when compared to national services.

Finally, both types of services offered mainly recent films (produced in or after 2008), with 58% of recent films on TVOD services and 69% of on SVOD services. National and US films were, on average, the least recent films (57% and 56% of recent national films on TVOD and SVOD, 52% and 65% of recent US films on TVOD and SVOD) while other international and EUR OBS tended to be the most recent (with respectively a share of recent films of 70% and 79% on TVOD and SVOD, 84% and 86% of recent films for EUR OBS films). EU films had a share of recent films of 62% on TVOD and 70% on SVOD, while EU non-national films were more recent with 64% of recent films on TVOD and 74% on SVOD.

These figures tend to point to the fact that for catalogues films (produced in or before 2007), audiences prefer to consume nationally (films already seen, national classics) or US films (both blockbusters and classics). Films of other origins than national or US have to be more recent to attract viewers.

This is furthermore underlined by the fact that US catalogue film titles circulated the best among all catalogue titles with only 35% on TVOD and 52% on SVOD of US catalogue film titles being available in only one country, while the same figures for EU catalogue film titles were 62% and 78% respectively.

All findings are based on the overall averages on the shares of films on both types of services, TVOD and SVOD, and national and multi-country VOD services. The situation of each catalogue of a given service is different, and strong differences still exist between countries, services, and catalogues of a same service. The sample of VOD services in itself is composed of services of different natures (niche, mainstream, specialised, art house) and different ownerships (media companies, tech companies, independent, and telecom operators). For all these reasons, the averages in this report only reflect a part of the true state of the VOD sector in the European Union and the results should be taken only on an indicative basis.

On the shares of films and film titles by region of origin

Films – cumulative count, each occurrence of a film is taken into account – 77 TVOD and 45 SVOD services

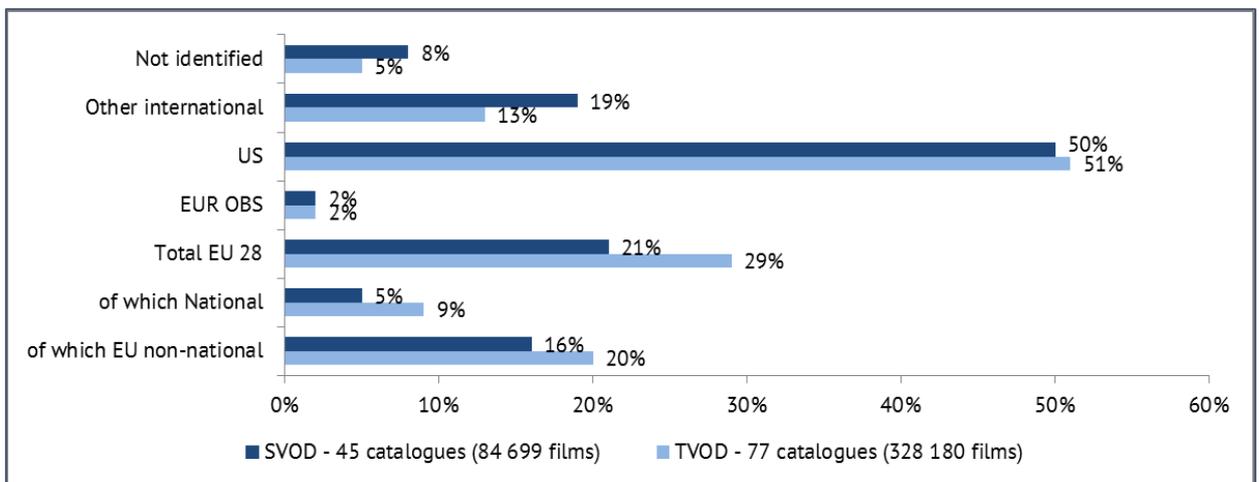
- The average share of EU films on TVOD was 29% (with 20% of EU non-national and 9% of national films), ranging from 6% in the catalogue of Cytavision in



Cyprus to 100% in the catalogue of Kino Fondas in Lithuania. The average share of EU films on SVOD was 21% (with 16% of EU non-national and 5% of national films), ranging from 12% in 4 Netflix catalogues (CZ, HR, LT, SI) to 67% in the catalogues of realez in Germany and 77% in the one of Uncut France.

- The top 5 main production countries accounted for 76% of all identified films on TVOD (US, UK, France, India, Germany), and 75% on SVOD (US, India, UK, Germany, France).

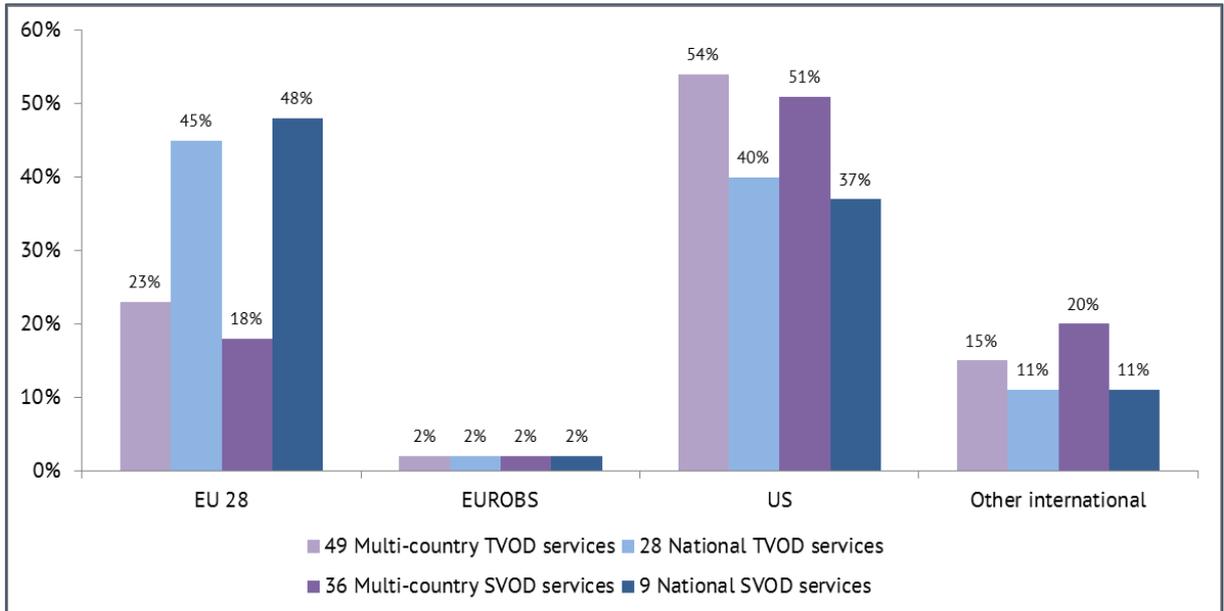
Average shares by region of origin of films in SVOD and TVOD catalogues



Source: European Audiovisual Observatory

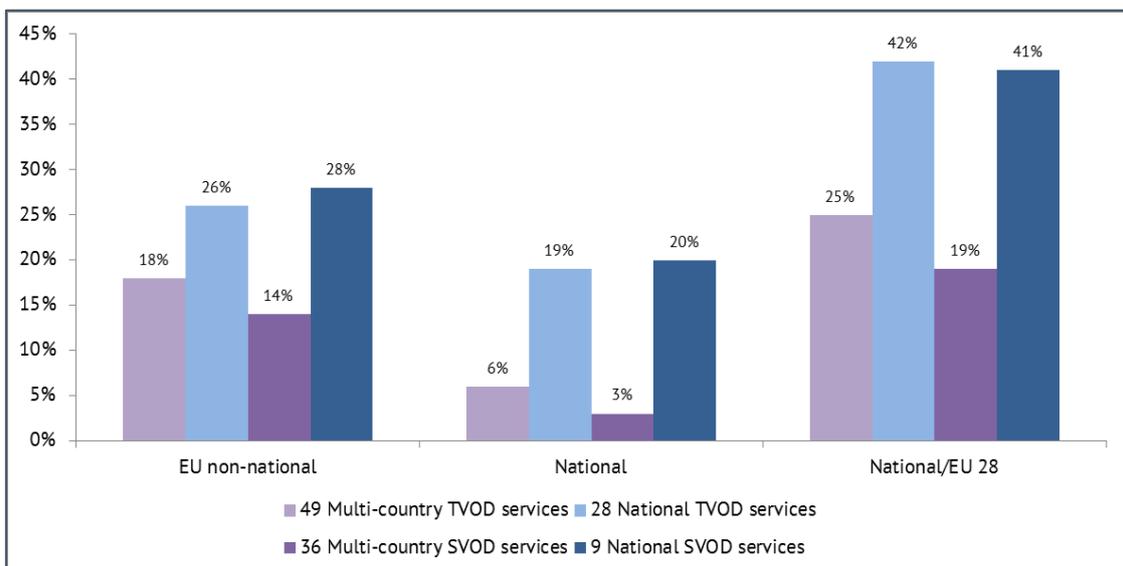


Region of origins - national and multi-country SVOD and TVOD services



Source: European Audiovisual Observatory

National and EU non-national films - national and multi-country SVOD and TVOD services

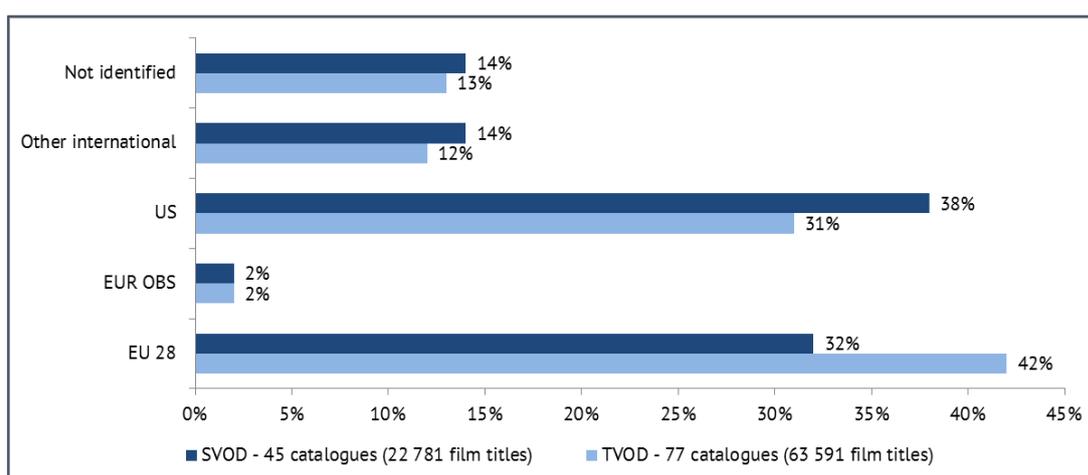


Source: European Audiovisual Observatory

Unique film titles – film titles are only counted once, regardless of occurrences – 77 TVOD and 45 SVOD services

- The share of EU unique film titles on TVOD was 42% for all of the 77 TVOD services.
- The share of EU unique film titles on SVOD was 32% for all of the 45 SVOD services.
- The top 5 main production countries accounted for 67.5% of all identified unique film titles on TVOD (US, France, UK, Italy, Germany), and 68.7% on SVOD (US, Germany, UK, France, India).

Average shares by region of origin of film titles in SVOD and TVOD catalogues



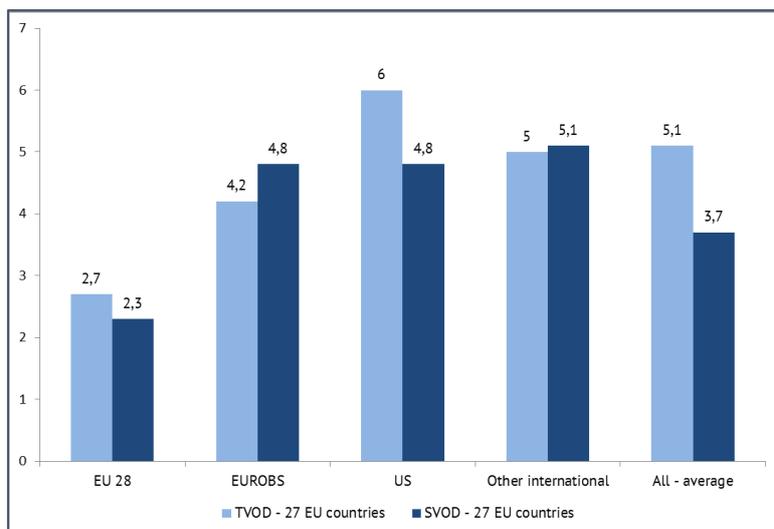
Source: European Audiovisual Observatory

On the circulation of unique film titles by region of origin in countries and on VOD services

■ Country circulation

One given film title was available on average in 5.1 countries on TVOD and in 3.7 countries on SVOD, however with stark differences when the region of origin is taken into consideration.

Country circulation of unique film titles by region of origin

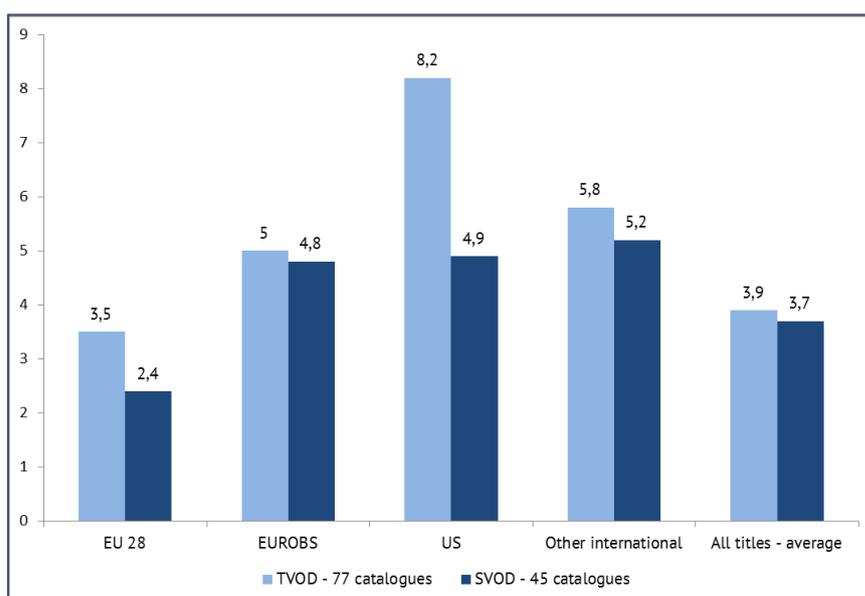


Source: European Audiovisual Observatory

■ Service circulation

One given film title was available on average in 3.9 catalogues on TVOD and 3.7 catalogues on SVOD, again with strong differences when the region of origin is considered.

Service circulation of unique film titles by region of origin

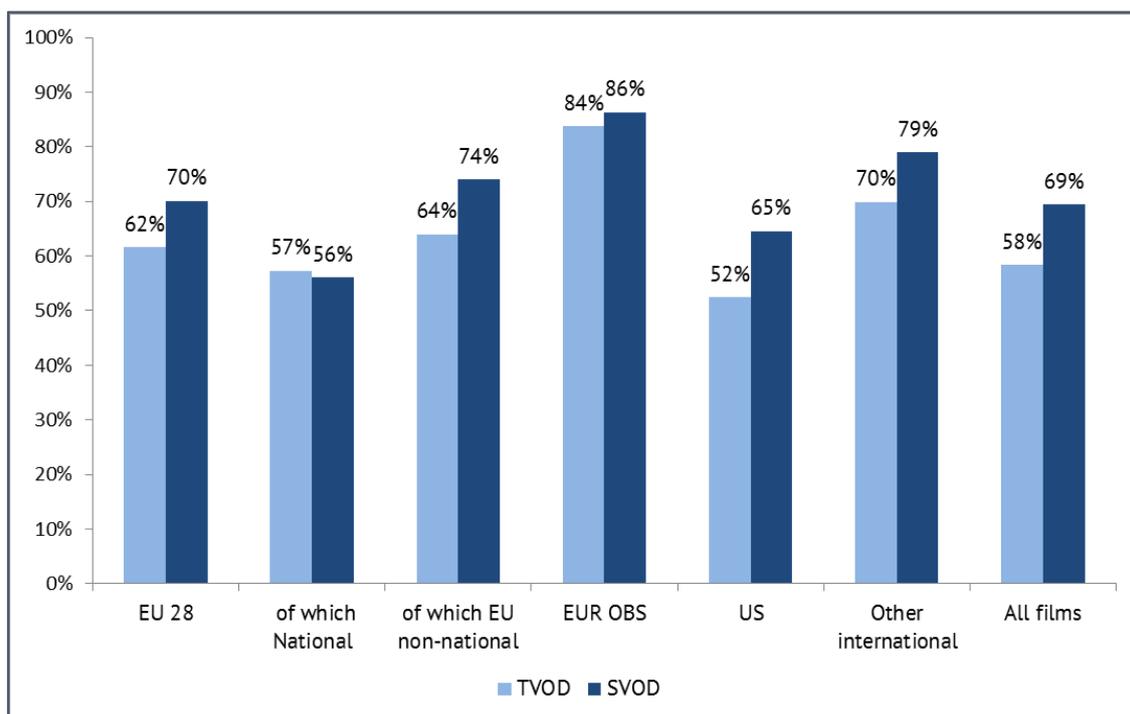


Source: European Audiovisual Observatory

On the share of recent films¹ in VOD catalogues

Recent films represented 58% of films in TVOD catalogues and 69% in SVOD catalogues.

Average share of recent films in TVOD and SVOD catalogues by region of origin



Source: European Audiovisual Observatory

¹ A recent film is defined as being produced in or after 2008 in this report (under 10 years of age)



1. Extended executive summary

1.1. Notice on the data in this report

Caution: Limits to the overall percentage of EU films and EU film titles

The VOD sample, for TVOD and SVOD services, is made of a large variety of different services: national/multi-country, art house/general entertainment; niche/mainstream; operated by different players such as technology companies, telecom operators, media players or independent players; and are therefore not comparable as such.

Large differences with regard to the share of EU films exist between VOD services and even between the different country catalogues of multi-country VOD services and this is the case both for TVOD and SVOD services. The averages are only reflecting different situations in countries and for different types of services and should not be considered as giving a true image of VOD catalogues. This can only be done on an individual catalogue basis.

The catalogues reflect only an image at a given date and could have changed significantly since the data was collected. Therefore, the shares and analysis given in this report reflect the situation in December 2017/January 2018 for most of the catalogues, up to May/August 2018 for the most recent ones.

On the difference between the measurement of overall films (cumulative, each occurrence of a title is counted) and of unique film titles (each unique title is only counted once)

Shares by region of origin can be measured in two different ways. The first one (in this report “films”), is the cumulative count of each occurrence of a film title in a given catalogue. The second one (in this report “film titles”), is the count of unique film titles in all catalogues, a film title being counted only once and not according to the number of occurrences in the different catalogues.

These two different ways of measurement of the shares of films and film titles should be taken into account in the overview of the share of EU films for services of both business models. While EU unique film titles represented 42% of all film titles on TVOD services and 32% of all film titles on SVOD services, the count of their occurrences in the catalogues gives an overall share of 29% in the catalogues of TVOD services and 21% in the catalogues of SVOD services.

Explanation of the differences in the share of EU films and film titles



The differences in the shares of unique EU film titles and cumulative films in VOD catalogues are explained by a lesser circulation of EU film titles in VOD catalogues and therefore between countries.

The differences in circulation have several reasons; language differences, cultural proximity/distance, theatrical releases, promotion/marketing of films - all of these factors play a role. Also, multi-country services tend to offer US and international films in several of their country catalogues while offering national films often only in the national catalogue of their services or those sharing the same language. Another factor is that national services are offering more national films (which for the majority do not cross national borders) and while this inflates the number of unique EU film titles, this lessens also the circulation of EU titles.

On the differences between VOD services and catalogues in the shares of films by region of origin

These same differences are also found when the ownership of a specific VOD service is considered. On average, services operated by national players in the VOD sample tend to have a higher share of EU and national films.

On the differences of EU films in VOD catalogues: national and EU non-national films

When it comes to EU 28 films, the report accounts for 2 origins, national films (being films produced in country of the VOD catalogue) and EU non-national (films being produced in another EU country).

Additional sections

This report also includes sub-sections on the circulation of film titles and the share of recent and catalogue films and film titles in VOD catalogues and their circulation. While these are subjects on which the Observatory has published individual reports, we decided that these angles might add analysis to better describe VOD catalogues of VOD services in the EU.

Research questions addressed in the report

What is the composition of VOD film catalogues – by region of origin and country of origin?

How many unique film titles are in European VOD catalogues – by region of origin and country of origin?

What is the share of individual EU and EUR OBS countries of production in TVOD and SVOD catalogues?

How diverse or concentrated are VOD catalogues when countries of production are taken into consideration?

What are the main differences between TVOD and SVOD catalogues regarding region of production, circulation and share of recent and catalogue films?



What are the differences between national and multi-country VOD services when it comes to the composition of VOD catalogues?

How do film titles on VOD circulate (on services and in countries), by region of origin and country of origin?

What are the shares of recent and catalogue film titles by region of origin in VOD catalogues?

Are there differences in the circulation of recent and catalogue film titles?

Caution: On the limits of the VOD sample, data gathering and identification of titles

While the TVOD sample is quite diversified, with several types of services, the SVOD sample relies on a large part on Netflix' catalogues which account for 60% of all SVOD services (close to their market share in Europe). Amazon, the other big pan-European SVOD player is only represented in the United Kingdom. While this skews heavily the SVOD sample, we are working towards adding more national SVOD services and several country catalogues of Amazon in the EU, in combination with the development of the registry of European films on VOD undertaken by the European Audiovisual Observatory and the European Commission.

We estimate that a small percentage of film titles might have erroneously identified, but this should concern less than 5% of all film titles. Overall, the shares by region of origin reflect the films in the catalogues of the VOD sample. The main databases used for the identification of titles (according to original or alternative titles, year of production, director when available) were LUMIERE, IMDb and the Movie Database. Only when these databases did not have information on the film titles, the information provided by the VOD services were taken into account and additional manual identification was also done. This procedure provides more accurate identification of countries of production of individual film titles.

The data gathering having been undertaken at different time intervals, the shares might have changed at the date of publication of this report. The new project of the registry of films on VOD will allow for a more timely observation of the shares of films by region of origin in 2019. Therefore, all data included in this report is subject to changes and some shares might not be accurately reflecting catalogues' composition in 2019.

Methodology

Country of production: Only the first country of production in the case of co-productions is taken into account.

The information on the country of production, once a film title has been identified, is provided either by LUMIERE, either by IMDb, and in the case the film is not listed in these databases, the information on the country of



production is taken from the VOD service or a manually identified by using several sources.

4 different regions of origins:

EU: Member States of the European Union, with a subdivision of national films, when the film is produced in the country of the VOD service and EU non-national, when the film is of EU origin other than the country where the service is operating. This subdivision is only done for the cumulative count of films and on an individual catalogue basis

EUR OBS: A Member State of the European Audiovisual Observatory not part of the EU².

US: A film produced in the United States, or for which the first production country is US.

Other international: All other countries not part of the above mentioned regions.

Definition of recent and catalogue films:

Catalogue films: Films produced in or before 2007 (10 years and more)

Recent films: Films produced in or after 2008

² The list of the 41 Member States of the European Audiovisual Observatory:
<https://www.obs.coe.int/en/web/observatoire/members-/-executive-council>



1.2. Overview all TVOD and SVOD services - region of origin

Films are counted by each presence in a VOD catalogue, the cumulative count of each occurrence of a film title.

Averages on the region of origin of films

TVOD services, with a higher number of national services (28) than SVOD services (9) in the VOD service sample, had a higher share overall of EU 28 films, with 29% compared to 21% on SVOD, with EU non-national films representing for both type of services the largest amount of EU 28 films with 20% for TVOD and 16% for SVOD. National films accounted on average for 9% on TVOD and 5% on SVOD. British, French and German films accounted for over 60% of all EU films found in TVOD and SVOD catalogues. **Figure 1**

Of course, large differences regarding shares of origin of films exist within both types of services and the averages reflect only an overall overview. The differences are explained by the nature of the services (national or multi-country), the operators (independent, telecom, media or tech players) or even the focus of the services (art-house, entertainment, generalised or specialised). The sections for each VOD business model show the differences among services.

US films accounted on average for roughly half of the films in the catalogues of TVOD and SVOD services.

Films produced in EUR OBS member states (members of the European Audiovisual Observatory but not part of the EU) represented 2% for each type of VOD services. Turkey, Russia and Norway were the main production countries in the region classified as EUR OBS.

Finally, SVOD services had the largest share of other international films with 19% compared to TVOD's average of 13%. The main production countries for this region of origin were India, Canada, Australia, Brazil, Honk Kong, Japan, Mexico, Argentina, China and South Korea.

Main production countries

When only identified films by production country are taken into account (unidentified films are not considered), the top 20 production countries had exactly the same shares of films in TVOD and SVOD catalogues – 92.8% of all films were produced in the top 20 countries. **Table 1**

Main EU production countries of films in TVOD and SVOD catalogues

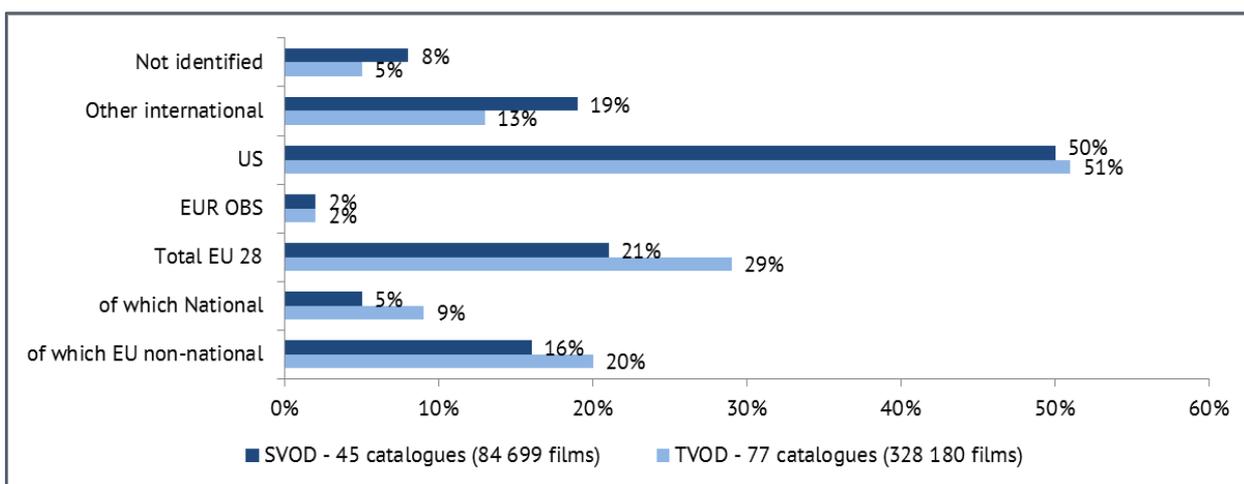
When only EU films are taken into account, films produced in the United Kingdom (25.4% on TVOD, 30.4% on SVOD), France (25% on TVOD, 15.2% on SVOD) and Germany (11.6% on TVOD, 15.2% on SVOD) were the main production countries of EU films, representing around 60% of all EU films that were available in catalogues of both types of services. **Figure 2**

The top 10 EU production countries represented 91.6% on TVOD and 92.4% on SVOD of all EU films.



The influence of services specialised in national films can be seen in the share of Lithuanian films on TVOD with 0.5% (films found mainly in the Lithuanian TVOD service Kino Fondas) while accounting for 0.1% on SVOD, or Czech films which represented 3.9% of films on SVOD (mainly on Voyo) but only 1.3% on TVOD. The large drop of French films from TVOD to SVOD can be also accounted for by the larger number of French TVOD services than SVOD services.

Figure 1 TVOD/SVOD – Region of origins of films in catalogue



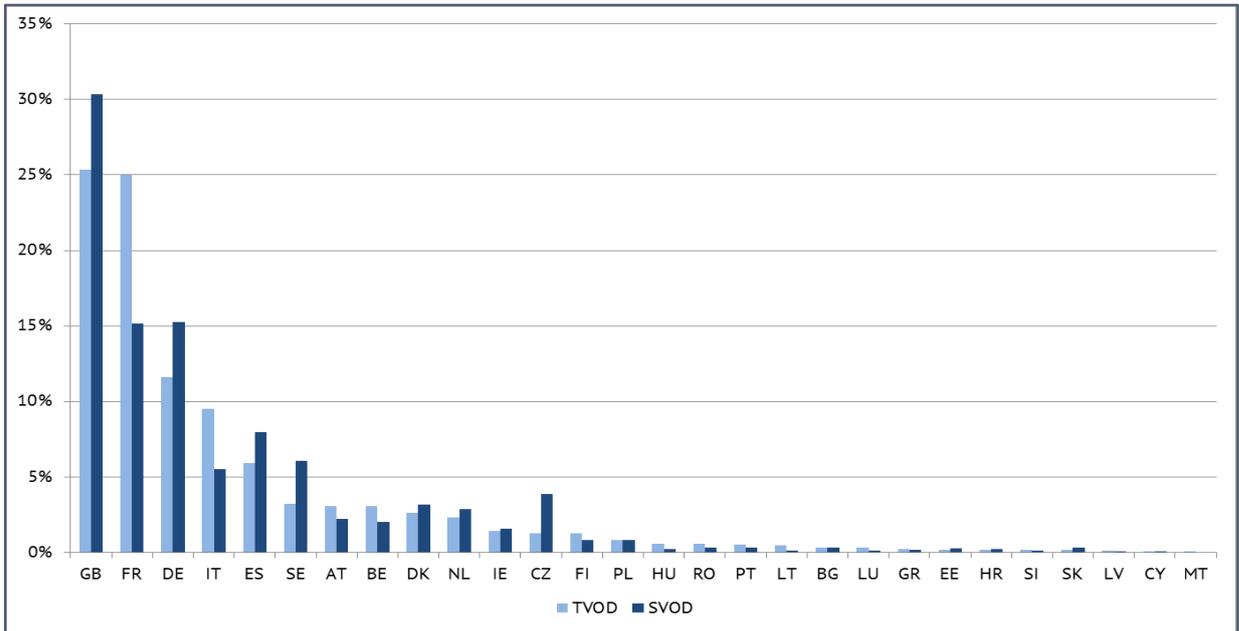
Source: European Audiovisual Observatory

Table 1 TVOD/SVOD – Top 20 production countries by region of origin and % of total identified films

Region of origin of top 20	TVOD - 77 services	SVOD - 45 services
EU	11 countries - 28,2% of films	8 countries - 19,6% of films
Other international	6 countries - 10,2% of films	10 countries - 10,3% of films
EUROBS	2 countries - 0,9% of films	1 country - 1,7% of films
US	1 country - 53,5% of films	1 country - 54% of films
Top 20 production countries represented % of all identified films available	92,8%	92,8%

Source: European Audiovisual Observatory

Figure 2 TVOD/SVOD Main EU production countries of EU 28 films



Source: European Audiovisual Observatory

1.3. Differences between national and multi-country TVOD and SVOD services

For both business models, national services had a higher share of EU 28 films, with a share of 45% for national TVOD services and 48% for national SVOD services. **Figure 3**

Multi-country services on the other hand had clearly lower shares of EU 28 films with 23% for TVOD services and 18% for SVOD services.

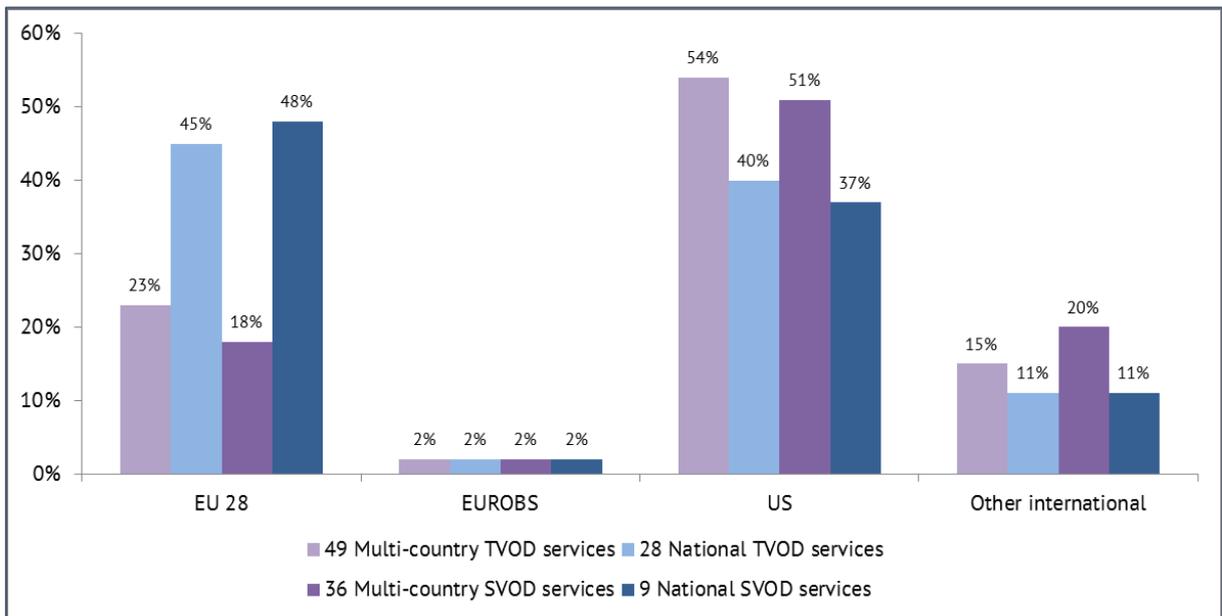
Without surprise, national services had a higher share of national films (19% on TVOD, 20% on SVOD) while multi-country services (hereafter MCS) had a share of national films of 6% on TVOD and 3% on SVOD. MCS had also a lower share with regard to EU non-national films which accounted for 18% of films in TVOD catalogues and 14% in SVOD catalogues. National services had a much higher share of EU non-national films with 26% on average on TVOD and 28% on SVOD. **Figure 4**

The higher focus on national films for national services than MCS, on TVOD and SVOD, becomes even more visible when the proportion of national films in EU 28 films is considered; 42% of all EU 28 films in national TVOD services were national films, 41% in national SVOD services. These services tend to offer a larger part of their EU film catalogues to national films to cater to their customers.



MCS had a share of national films in EU 28 films of 25% for TVOD services and 19% for SVOD services. MCS tend to offer more national films in bigger film producing countries (such as the United Kingdom, France, Germany, Italy, Spain) and rely on EU non-national films in the catalogues of smaller film producing countries, with several catalogues of both TVOD and SVOD services in some countries offering close to 0% of national films while still having a small EU 28 film offering in these catalogues. **Matrix 1**

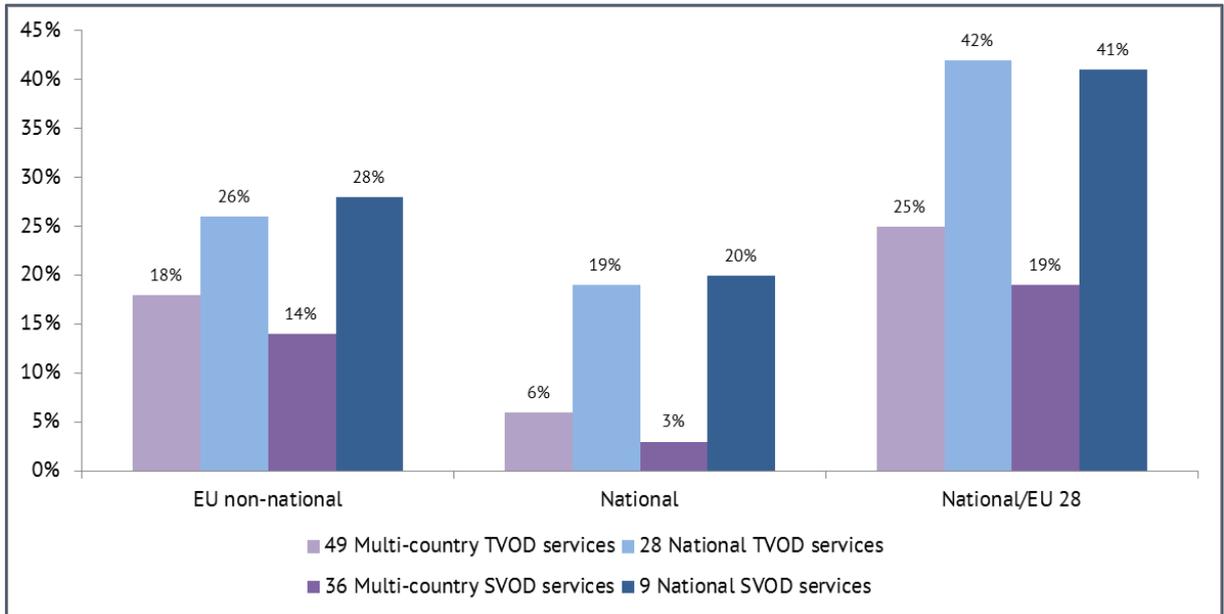
Figure 3 TVOD/SVOD – Regions of origin of films – differences national and multi-country services



Source: European Audiovisual Observatory



Figure 4 TVOD/SVOD EU non-national and national films and Proportion of national films in EU films

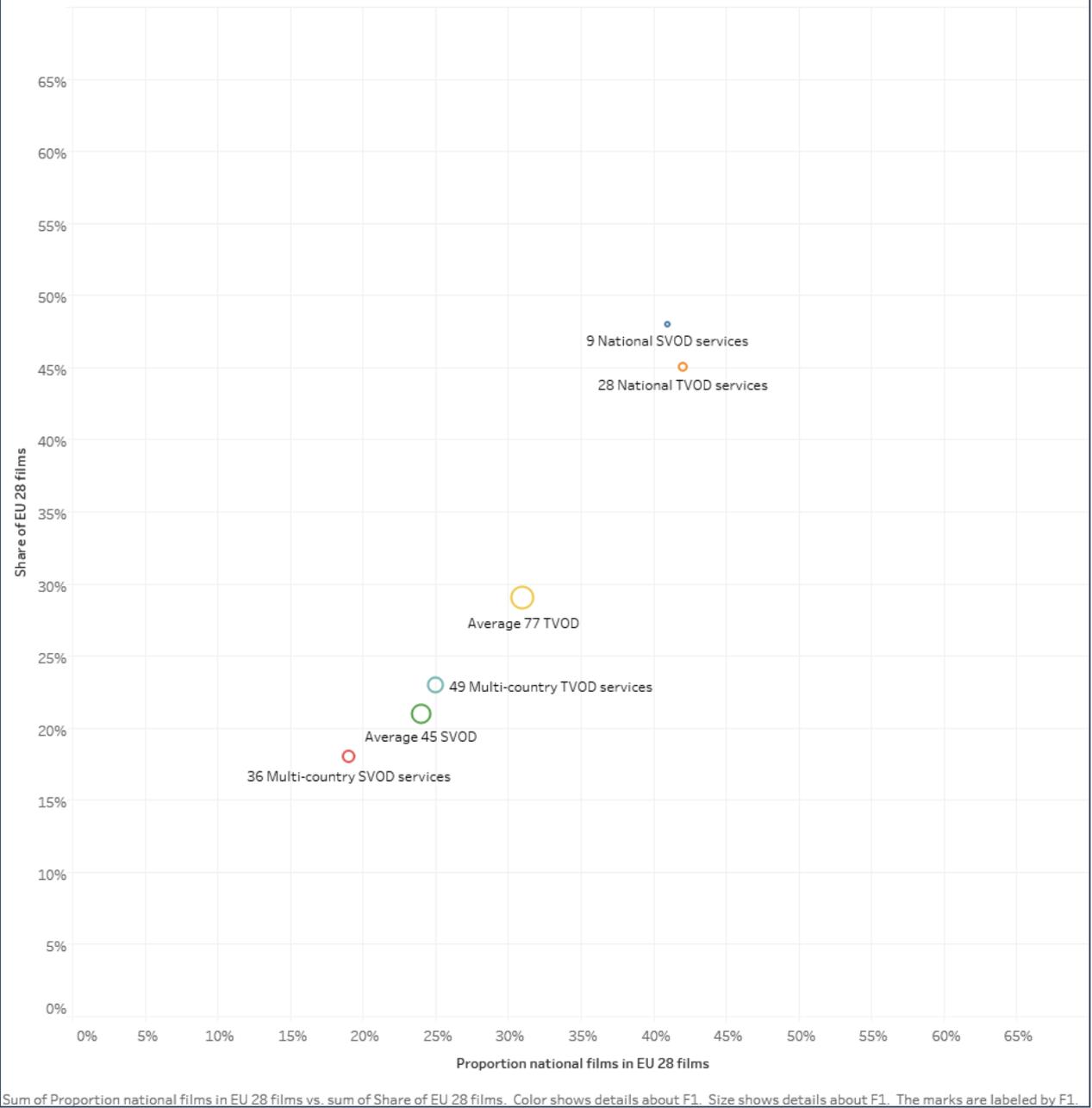


Source: European Audiovisual Observatory



Matrix 1 TVOD/SVOD – Share of EU 28 films and proportion national films/EU films – National and Multi-country services and total averages, in %

Matrix all VOD services - Proportion of national films in EU 28 films and overall share of EU 28 films



Source: European Audiovisual Observatory



1.4. Origin of unique film titles by region of origin

Region of origin of unique film titles

For the calculation of the shares, a film title is only counted once, despite its occurrence in several catalogues. The aim is to establish the diversity of film titles present in VOD catalogues. A unique film title counts always for 1, even if it is present in 5, 10 and more catalogues. Unique film titles have not been reconciled between TVOD and SVOD catalogues. **Figure 5**

EU film titles represented the largest share of unique film titles available on TVOD services, with 42% of all titles. On SVOD, EU unique film titles ranked second to unique US film titles with 32% of all titles available.

US film titles represented 31% of film titles available on TVOD services and 38% of titles available on SVOD services.

Other international film titles had similar shares on TVOD and SVOD services with 12% and 14% respectively while EUROBS had a share of unique films titles similar to their share of films in the catalogues with 2%.

The shares of unique film titles shows that while EU titles represent a larger share of unique film titles, when all presences in VOD catalogues are considered their share diminishes. This comes from a lower circulation of EU titles, in countries and on services as the next section shows.

Top 20 production countries of unique film titles

As it was the case with the cumulative count of films, the share of unidentified film titles is not taken into consideration to calculate the share for the top 20 list of production countries. **Table 2**

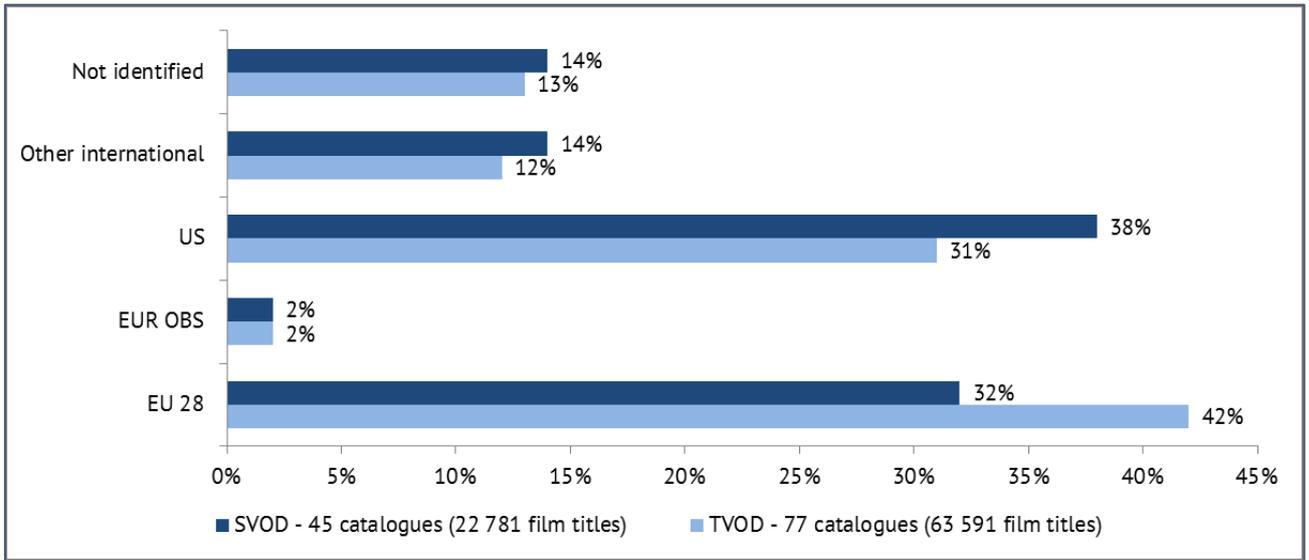
The top 20 production countries by number of unique film titles accounted for 90.4% of all identified unique film titles on TVOD and 91% on SVOD.

11 EU countries were in the top list for both types of services, with these 11 EU countries accounting for 44.5% of all identified unique film titles on TVOD and 35.3% on SVOD.

Main EU production countries of unique EU film titles

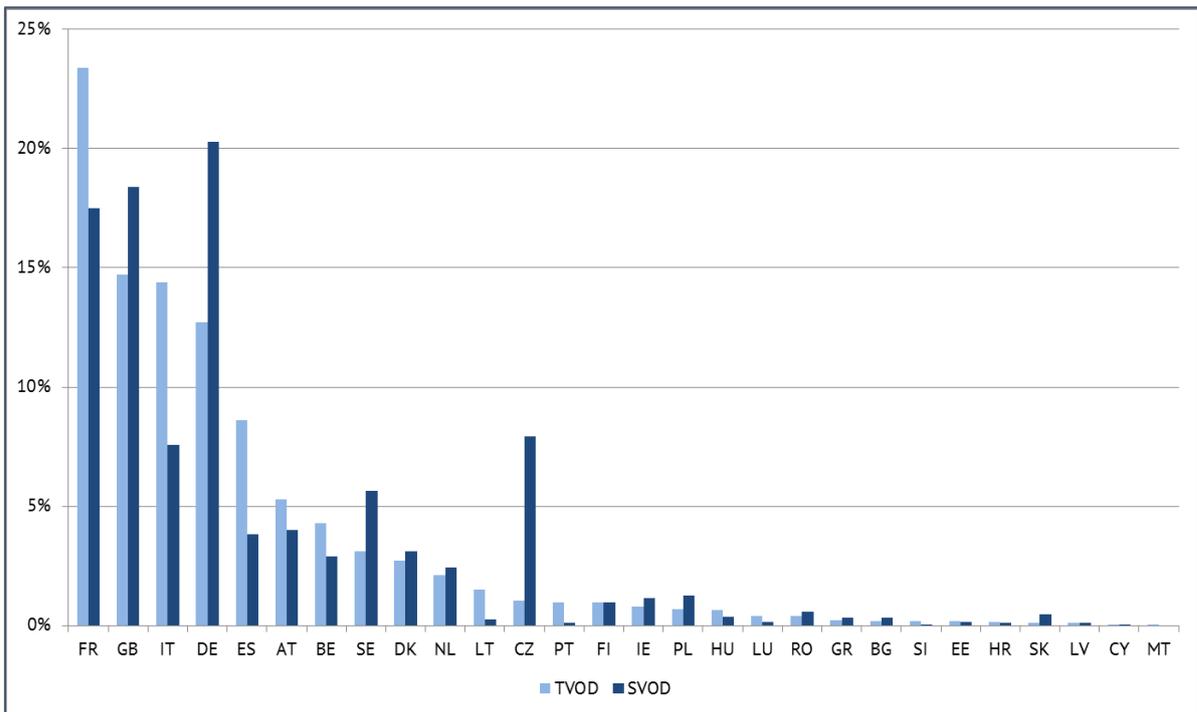
While on TVOD the usual EU-5 countries accounted for 74% of unique film titles (France with 23.4% of all EU titles, the United Kingdom with 14.7%, Italy with 14.4%, Germany with 12.7% and Spain with 8.6%), on SVOD the ranking changed. Germany was the country with the most unique EU films titles, accounting for 20.3%, followed by the United Kingdom with 18.4%, France with 17.5% and the Czech Republic with 7.9% (mostly due to the presence of many Czech films on Voyo and Horizon CZ, Czech titles ranked at the 12th place on TVOD with 1%) and Italy with 7.6%. The top 5 countries on SVOD represented 72% of all unique EU titles. Spanish unique film titles came at the 8th place with 3.8% of all EU film titles, outranked by Swedish titles (5.6%) and Austrian titles (4%). **Figure 6**

Figure 5 TVOD/SVOD – Region of origins of unique film titles in catalogues



Source: European Audiovisual Observatory

Figure 6 TVOD/SVOD Main EU production countries of unique EU film titles, in % of total unique EU film titles



Source: European Audiovisual Observatory



Table 2 TVOD/SVOD – Top 20 production countries by region of origin and % of total unique identified film titles

Region of origin of top 20	TVOD - 77 services	SVOD - 45 services
EU	11 countries - 44,5% of titles	11 countries - 35,3% of titles
Other international	7 countries - 9,1% of titles	7 countries - 11,2% of titles
EUROBS	1 country - 0,6% of titles	1 country - 0,6% of titles
US	1 country - 36,3% of titles	1 country - 44% of titles
Top 20 production countries represented % of all identified film titles available	90,4%	91,0%

Source: European Audiovisual Observatory

1.5. Circulation of film titles – the explanation of the drop in the share from unique film titles to total films in catalogues for EU films

Circulation of film titles – Strong differences for unique film titles by region of origin in country and service circulation

While cumulated EU films accounted for 29% and 21% on average on TVOD and SVOD, the share of EU unique film titles was much higher with respectively 42% and 32% on both types of services. At the same time, cumulated US films represented 51% of all films on TVOD services, while only accounting for 31% of all unique film titles. On SVOD, US films made up 50% of all films and accounted for 38% of all unique film titles. The explanation of these stark differences is found in the circulation of unique film titles; EU film titles were the titles with the lowest country and service circulation.

Country circulation (Maximum of 27 EU countries): On average, EU film titles circulated in 2.7 countries on TVOD and 2.3 countries on SVOD whereas US film titles were on average available in 6 countries on TVOD and 4.8 countries on SVOD. Other international film titles were available on average in 5 countries on TVOD and 5.1 countries on SVOD, and EUR OBS titles in 4.2 countries on TVOD and 4.8 countries on SVOD. **Figure 7**

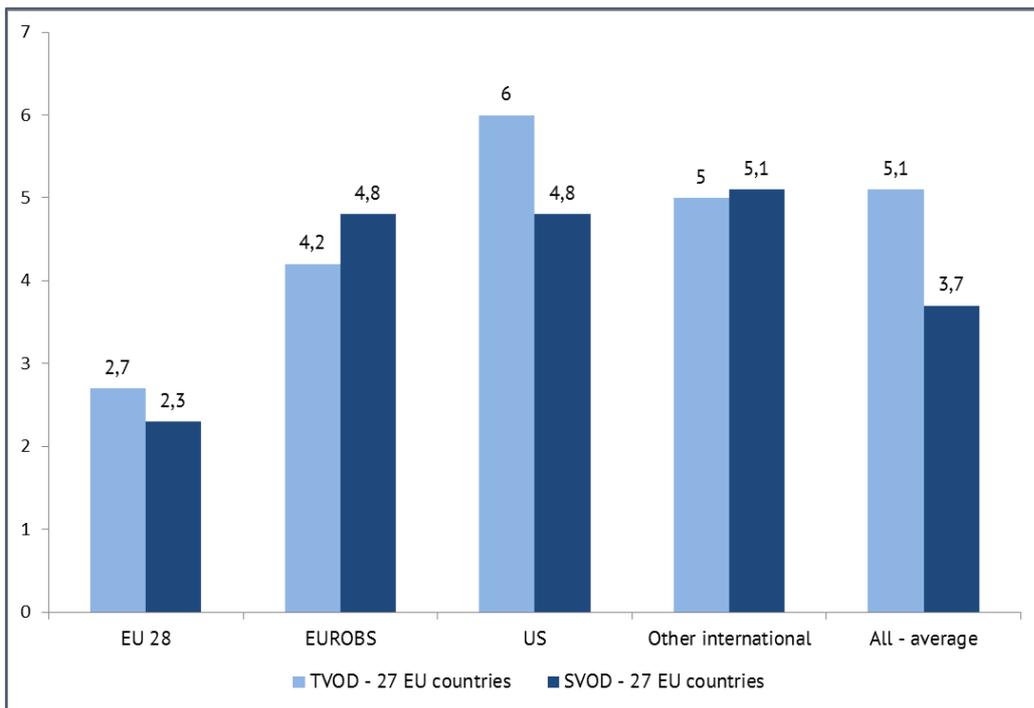
The large quantity of EU film titles is one explanation for the lesser circulation but not the only one; different languages, cultural proximity/distance, theatrical releases (or not) and the promotion (or not) of a title in a given country are other explanatory factors of the lesser circulation of EU film titles. Also, many national film titles are only found in the catalogues of national services or the national catalogue of multi-country services, whereas multi-country services tend to offer US and international film titles in a larger number of their different country catalogues. TVOD services tend to distribute these titles in a larger selection of



countries, whereas SVOD services tend to buy the rights or even exclusive rights to distribute these titles in a larger number of countries.

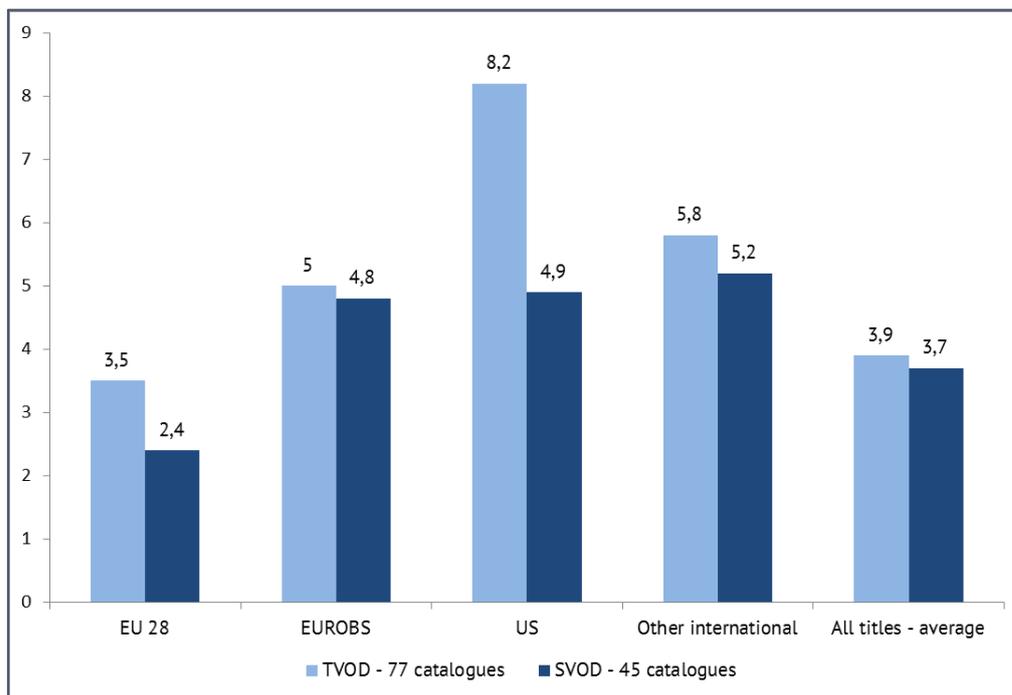
Service circulation: Even if the TVOD catalogue sample represents almost twice (1.7 times to be exact) the catalogues of the SVOD sample, the same differences/proportions in the circulation are found when it comes to service circulation. On TVOD, EU films were available on average in 3.5 services, on SVOD in 2.4. But the real impact of the larger TVOD sample can be seen for US film titles, with a presence on average in 8.2 catalogues on TVOD and 4.9 services on SVOD – the same proportion as the difference in the sample with 1.7 times (8.2 TVOD services/4.9 SVOD services) – a larger number of SVOD services in the sample could have meant a larger service circulation for US titles. For other international titles and EUR OBS titles, the service circulation was almost the same with respectively 5.8 TVOD services/5.2 SVOD services and 5 TVOD services/4.8 SVOD services. Multi-country SVOD and TVOD services tend to distribute these titles in a larger number of their catalogues and to license them for more countries for SVOD services. **Figure 8**

Figure 7 TVOD/SVOD - Country circulation of unique film titles by region of origin



Source: European Audiovisual Observatory

Figure 8 TVOD/SVOD – Service circulation of unique film titles by region of origin



Source: European Audiovisual Observatory

1.6. Diversity and concentration of production countries

On the average film catalogue size:

Without surprise, TVOD services have the larger film catalogues compared to SVOD services (4 307 and 2 178 films on average respectively) and for both business models, multi-country services have on average a larger catalogue than national services (5 046 for TVOD MCS and 2 967 for national TVOD services/ 2 178 for SVOD MCS and 931 for national SVOD services). **Figure 9**

Diversity - On the average number of production countries of films in catalogues

As with catalogue size, the same differences can be seen. TVOD services have on average films produced by 64 different production countries in their catalogues while SVOD services had on average films produced by 54 different production countries in their catalogues. **Figure 10**

TVOD MCS had on average 69 different production countries (with 113 different production countries in the catalogue of iTunes Ireland being the maximum, 15 different countries in the catalogue of Microsoft Denmark the minimum) and national TVOD services on average 55 different production countries (with 107 different countries in the catalogue of UniversCiné France the maximum, 4 in the catalogue of Cytavision VOD Cyprus the minimum).



SVOD MCS had on average 36 different production countries (with 80 different production countries in the catalogue of Amazon being the maximum, 10 different countries in the catalogue of Virgin Media Ireland the minimum, and the average for the 27 Netflix catalogues being 64 different production countries) and national SVOD services had on average 40 different production countries of films in their catalogues (with 71 different countries in the catalogue of realez Germany the maximum, 12 in the catalogue of Uncut France the minimum, but also having only 35 films in the catalogue, and SFR Play with 20 different production countries for 207 films in the catalogue).

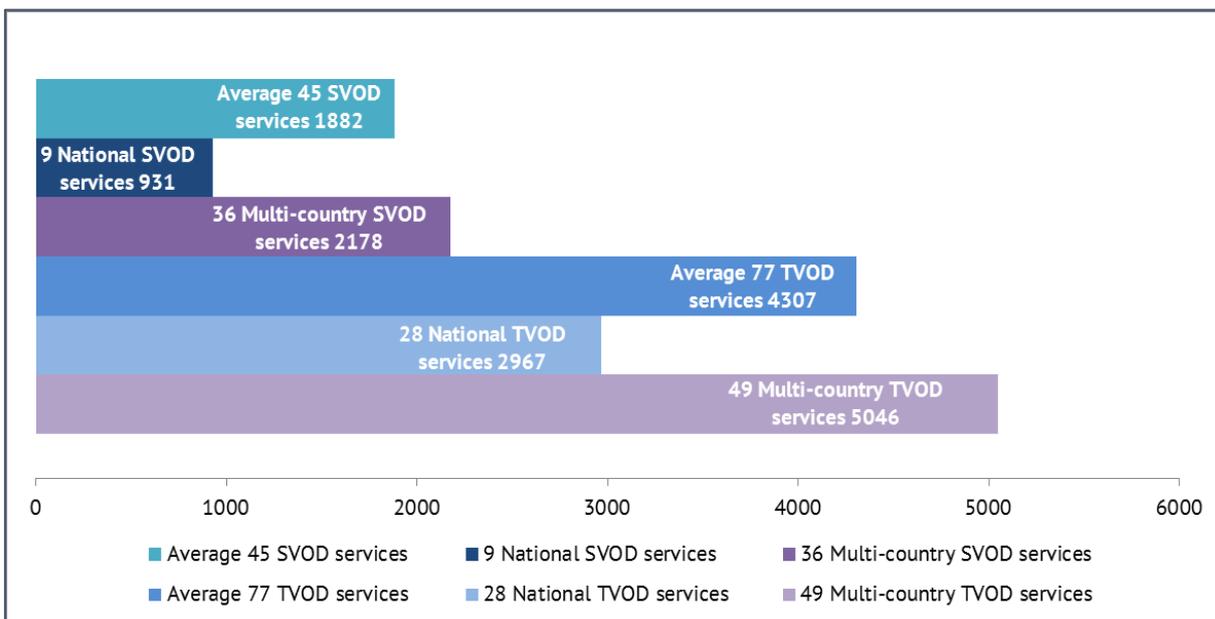
Concentration – a small number of production countries make up a large share of films in VOD catalogues

The top 3 production countries represented on average a share of 69% of all films in the catalogues of TVOD services and 68% of all films for SVOD services. The highest share of concentration was found in the catalogues of Cytavision with 99%, Kino Fondas (97%), Microsoft Denmark (94%) and Virgin Media with 91%, the lowest shares in the SVOD catalogues of Uncut France (64%), realez Germany (59%) and Uncut Belgium (58%) which concentrate on international art house films and in the TVOD catalogues of VOD.lu (63%), UniversCiné Belgium (63%) and France (60%), Filmin Spain (59%) and Médiathèque Numérique (58%) which do also focus on international art house films and aim to offer a variety of films to their customers. **Figure 11**

Also, when the share of films by production country is considered, while more than 5% of films are produced in 18 different production countries for 77 TVOD services and in 14 different production countries for 45 SVOD services, the number of different production countries drops rapidly when the percentage is raised; while there are still 11 different production countries on TVOD and 10 on SVOD with a share of more than 10% of films in the catalogues, this falls to respectively 5 for TVOD services and 5 for SVOD when the share is 20%, 4 different production countries for both types when the share is 30%, 4 and 2 when the share is 40% and finally 3 different production countries on TVOD when the share is 50% and 1 country (US) on SVOD. The majority of services have a large share of either US films or, for specialised services, national films in their catalogues, hence the concentration of production countries seen above. 63 TVOD services had a share of US films above 50% (with the 2 other production countries being Austria in the specialised catalogue of Kino VOD Club Austria and Lithuania in the specialised catalogue of Kino Fondas Lithuania), while on SVOD 32 catalogues had a share of US films above 50%. **Figure 12**

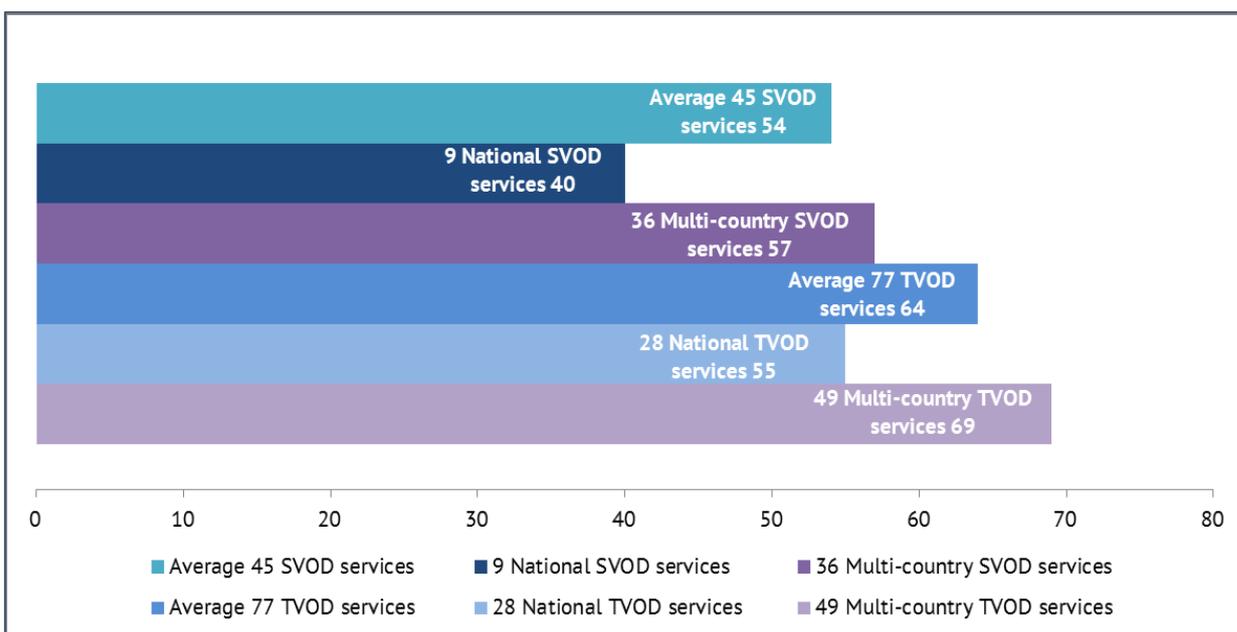


Figure 9 TVOD/SVOD – Average film catalogue size



Source: European Audiovisual Observatory

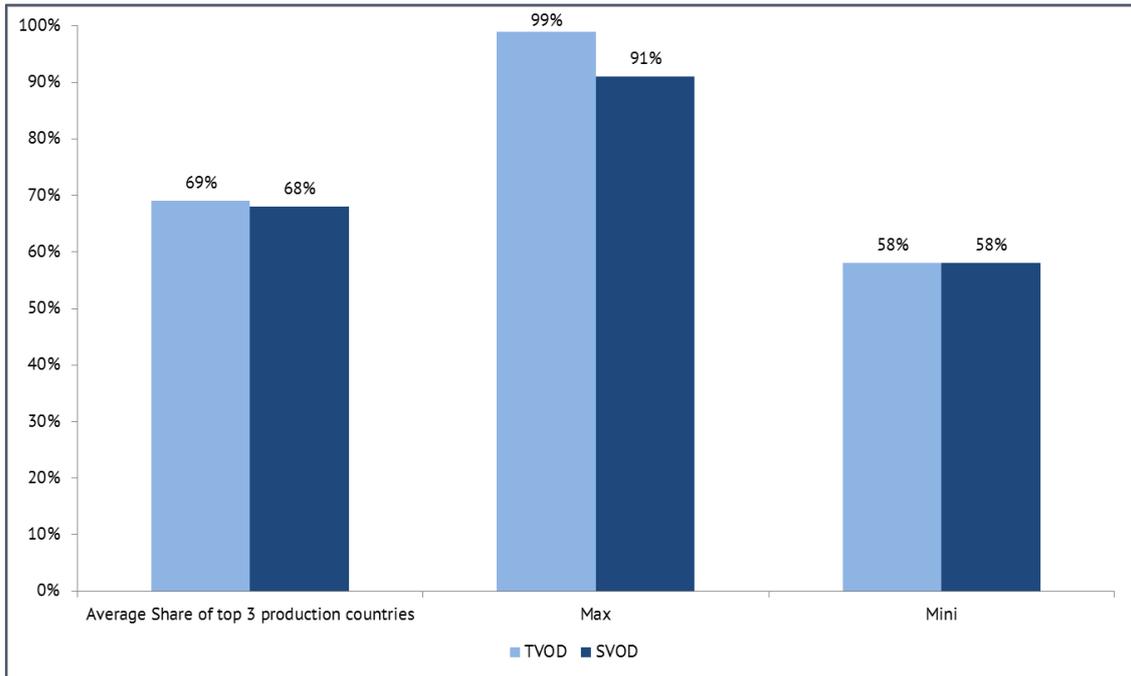
Figure 10 TVOD/SVOD – Average number of production countries for films in catalogues



Source: European Audiovisual Observatory

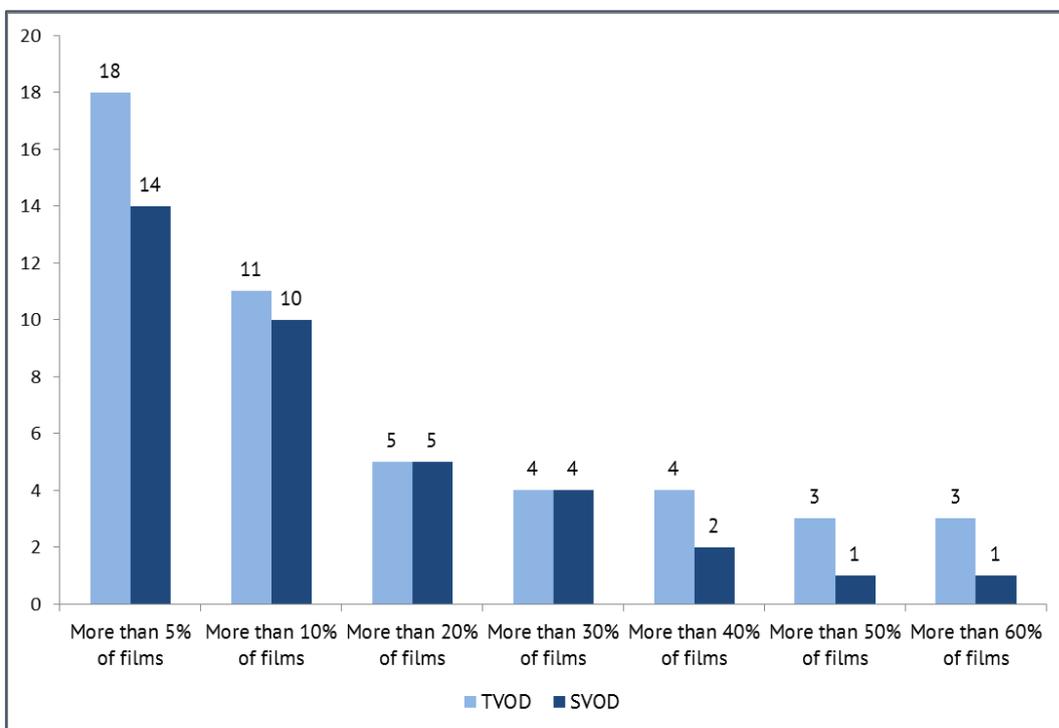


Figure 11 TVOD/SVOD Share of top 3 production countries in catalogues - Average and Max/Min



Source: European Audiovisual Observatory

Figure 12 Share of films in percentiles by presence in catalogues in number of different countries of production



Source: European Audiovisual Observatory



1.7. Age of films and film titles – share of recent films in VOD catalogues

Definition of recent and catalogue films

In this report, recent films are films produced in and after 2008. A catalogue film is defined as a film produced in or before 2007. As the main data collection took place in 2017, a catalogue film is defined as being produced 10 or more years ago, thus 2007 has been the “cut” year for the separation of recent and catalogue films.

On the share of recent films in VOD catalogues

Both types of services had mainly recent films in their catalogues, with an overall share of 58% of all films being produced in or after 2008 on TVOD catalogues and even 69% of all films in SVOD catalogues. Films of each region of origin were more recent on SVOD, except for national films which were slightly more recent on TVOD, with a share of 57% of recent films than on SVOD with a share of 56%. The higher overall share of national films in TVOD catalogues and the presence of more services focused on national production could explain this small difference. **Figure 13**

EU films were more recent on SVOD with a share of 70% of recent films than on TVOD with a share of 62%. National films were less recent than EU non-national films on both services, with EU non-national films being recent for 64% of all EU non-national films on TVOD and 74% on SVOD.

US films, after national films, were the less recent films by region of origin; 51% of all US films were recent on TVOD services, and still 65% of US films were recent on SVOD.

Considering these shares of recent films, the categories which were the least recent were national and US films, which could indicate that national catalogue films have still an appeal for national audiences both on TVOD and SVOD and that catalogue US films (such as older blockbusters but also ‘classics’) still find customers on TVOD services and an audience on SVOD.

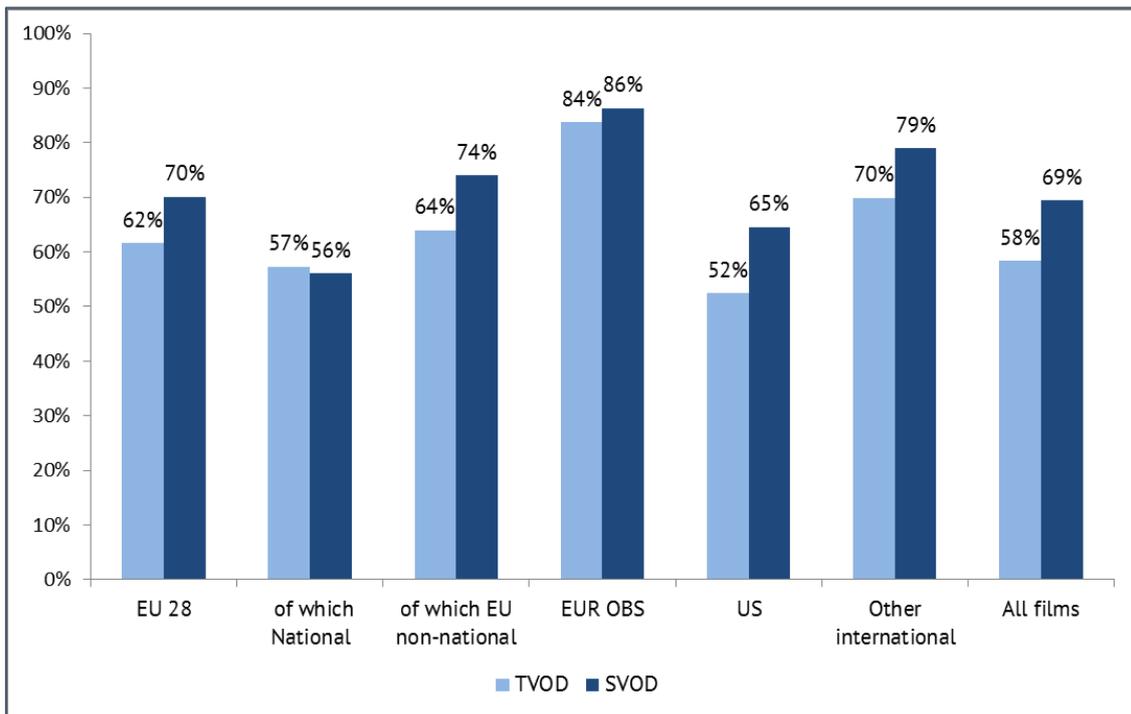
On the share of recent unique film titles

On average, unique film titles were more recent in SVOD catalogues than in TVOD catalogues with 58% of recent film titles in the 45 SVOD catalogues and 50% in these of the 77 TVOD services. The difference is found in the composition of the sample, with several TVOD services specialising on art house and also older films than on SVOD, which aim to provide more recent film titles to their subscribers in order to reduce churn. **Figure 14**



The share of recent films for unique film titles were significantly lower than when the cumulative share of recent films is considered. This shows that while there a large number of catalogue film titles of all region of origins (maybe a little less for EUROBS film titles), these catalogue films tend to circulate less, with the sole exception being US catalogue films which still manage to find an audience.

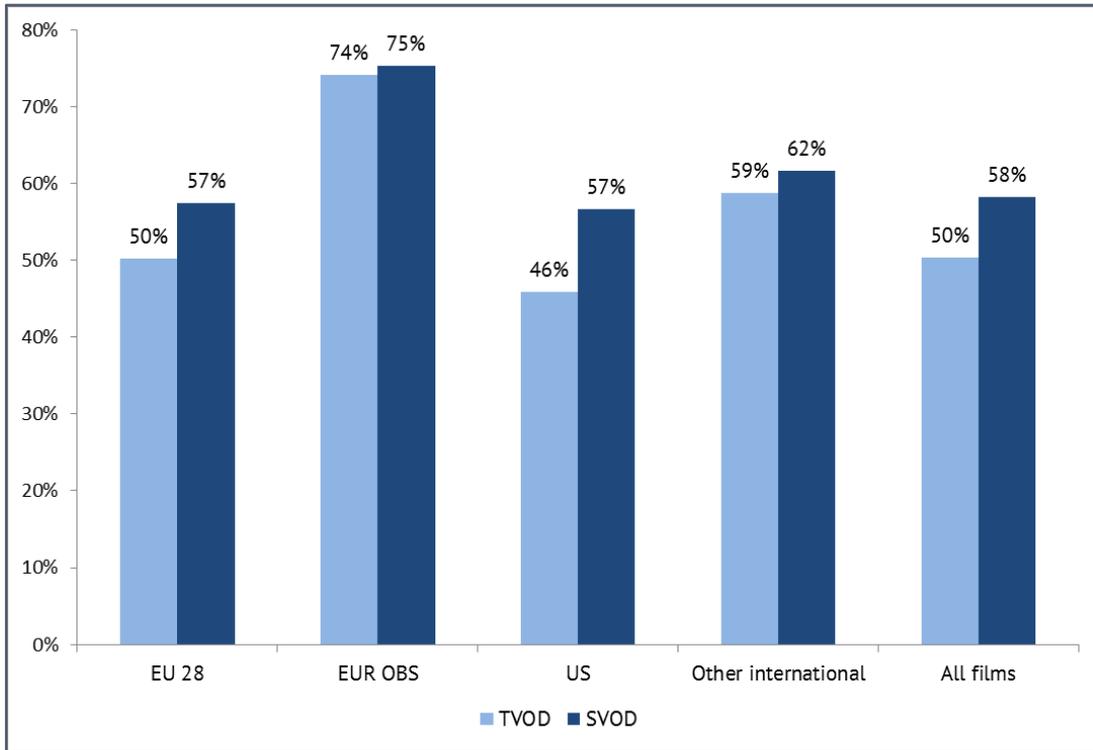
Figure 13 TVOD/SVOD – Average share of recent films in catalogues, in % of all films



Source: European Audiovisual Observatory

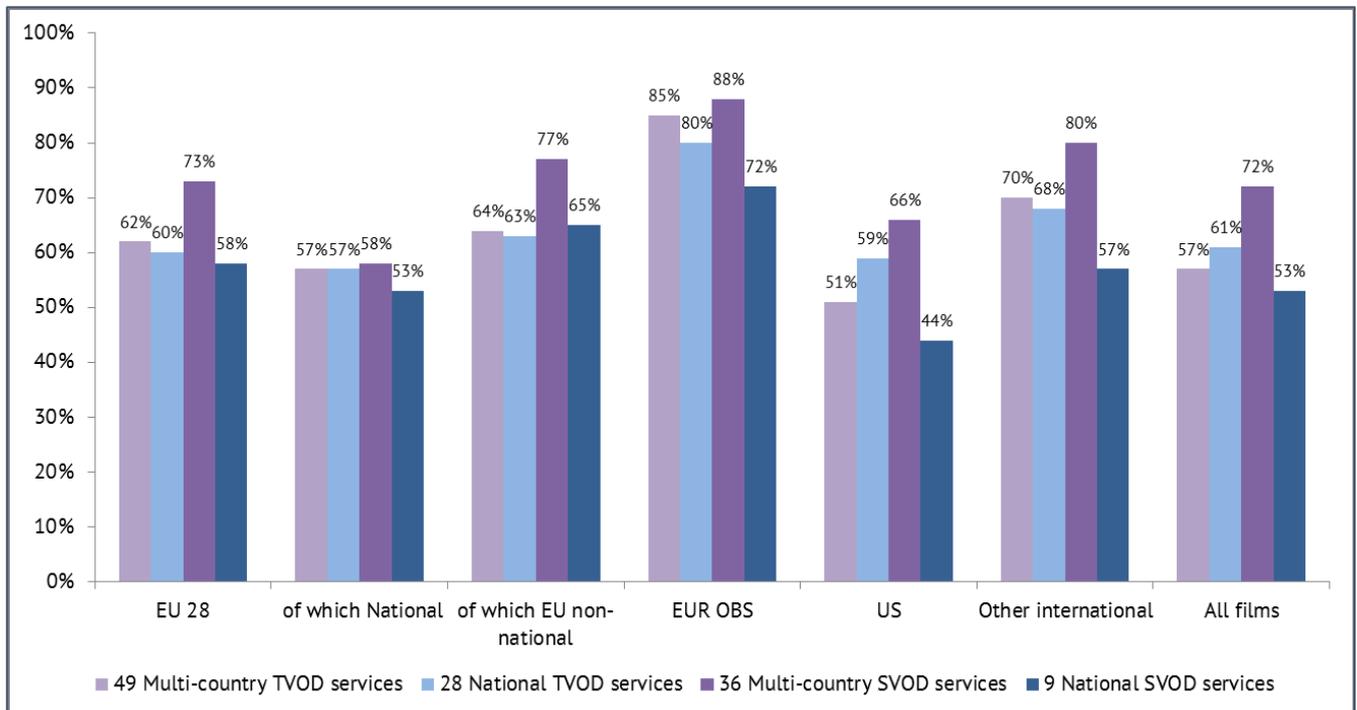


Figure 14 TVOD/SVOD – Share of unique recent film titles in catalogues, in % of total unique titles



Source: European Audiovisual Observatory

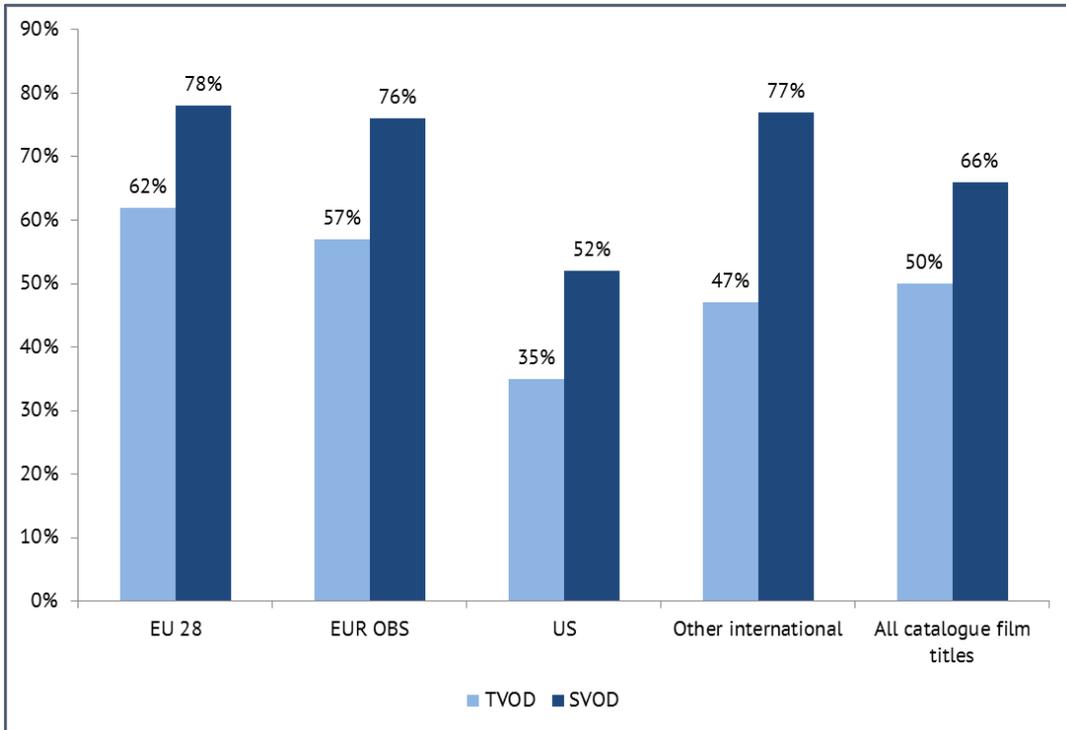
Figure 15 TVOD/SVOD – Average share of recent films by region of origin in catalogues



Source: European Audiovisual Observatory

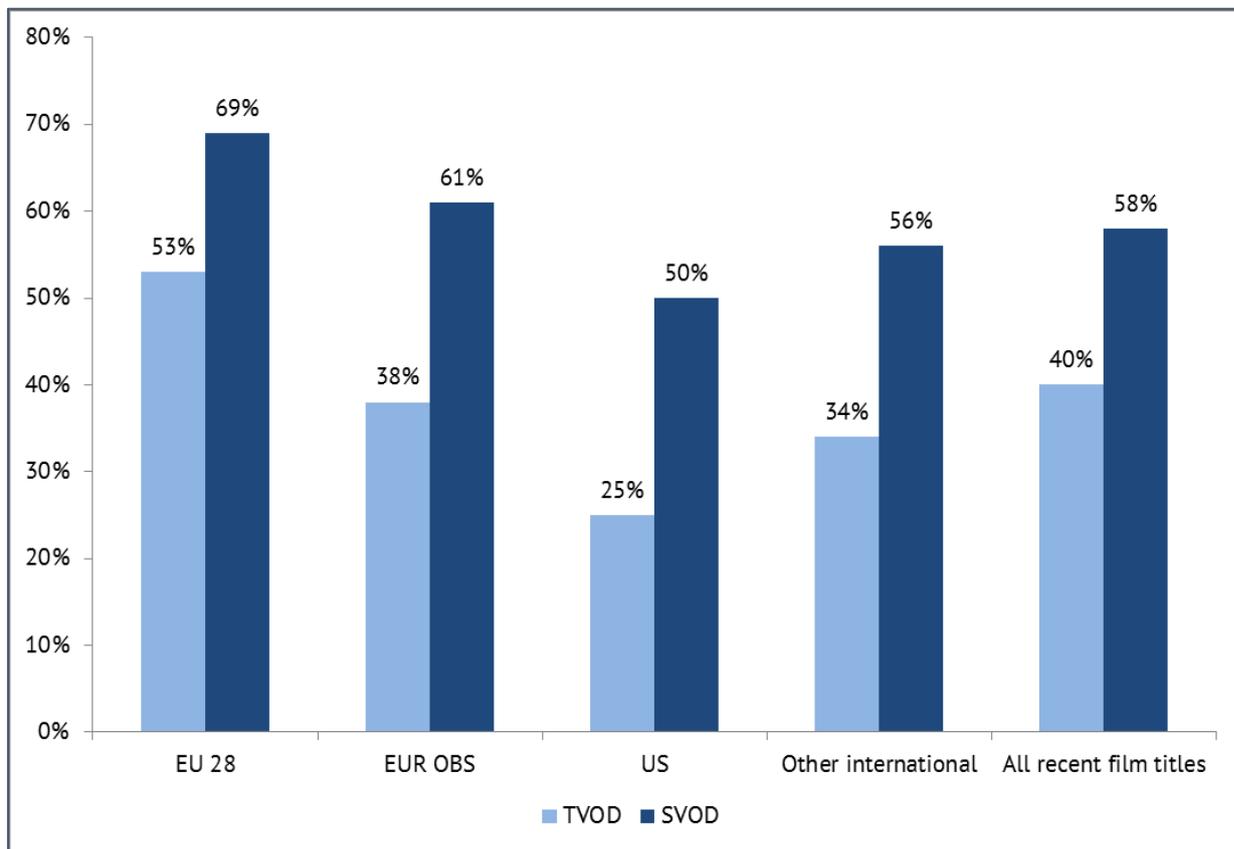


Figure 16 TVOD/SVOD – Share of catalogue film titles only available in one country by region of origin, in % of all catalogue films



Source: European Audiovisual Observatory

Figure 17 TVOD/SVOD – Share of recent film titles only available in 1 country by region of origin, in % of all recent films



Source: European Audiovisual Observatory



2. Detailed analysis of TVOD catalogues

In this section, the origin of films and film titles of 77 transactional VOD catalogues, with 28 national TVOD services and 5 multi-country services representing 49 country catalogues such as Apple's iTunes (25 countries), Microsoft's Films and TV service (12 countries), Rakuten TV (5 countries), ChiliTV (5 countries) and SF Anytime (2 countries), are detailed.

The general overview provides data on all TVOD catalogues; however, significant differences exist between services, be it in the origin of films, the number of films in the catalogues or the average year of production of these films. Therefore, in order to facilitate the comprehension of the data sets, a split is made between the 28 national and the 5 multi-country services in the following sub-sections after the general overview.

The films and film titles in the catalogues are analysed from 3 different angles:

- Origin (region of production and countries of production);
- Circulation of unique film titles in countries and on TVOD services;
- Share of recent and catalogue films and film titles (a catalogue film title is defined as being produced in 2007 or before, a recent film title in 2008 or after).

2.1. Origin of films and film titles in 77 TVOD catalogues

Origin of 328 180 films in 77 TVOD catalogues (cumulative count)

29% of all films are of EU origin, with national films accounting on average for 9% and EU non-national for 20%. **Table 4** and **Figure 18**

Films with an US origin represent on average 51% of the films in TVOD catalogues, followed by films with another international origin with 14% and EUR OBS films with 2% while for 5% of all films no region of origin could be identified.

Origin of 63 591 unique film titles in the 77 TVOD catalogues

42% of all film titles are of EU origin.

US film titles represented 31% of all film titles, other international film titles 12% and EUR OBS film titles 2%. 13% of film titles were not identified.

The following sections provide a more detailed overview on the regions and countries of origin of films and film titles found in the 77 TVOD catalogues.



Table 3 The 77 TVOD catalogues of the service sample by country

Country	TVOD Services	Country	TVOD Services
AT	ChiliTV AT	GB	Apple iTunes GB
AT	Apple iTunes AT	GB	Microsoft Film & TV GB
AT	Microsoft Film & TV AT	GB	RakutenTV GB
AT	Flimmit TVOD AT	GB	Sky Store GB
AT	Kino VOD Club AT	GB	TalkTalk GB
BE	Apple iTunes BE	GR	Apple iTunes GR
BE	Microsoft Film & TV BE	HR	MaxTV HR
BE	Belgacom Proximus TVOD BE	HU	Apple iTunes HU
BE	UniversCiné Belgium BE	IE	Apple iTunes IE
BG	Apple iTunes BG	IE	Microsoft Film & TV IE
CY	Cytavision VoD CY	IT	ChiliTV IT
CZ	Apple iTunes CZ	IT	Apple iTunes IT
CZ	O2 Videotéka CZ	IT	Microsoft Film & TV IT
DE	ChiliTV DE	IT	RakutenTV IT
DE	Apple iTunes DE	IT	Mediaset Premium Film IT
DE	Microsoft Film & TV DE	LT	Apple iTunes LT
DE	RakutenTV DE	LT	Kino Fondas LT
DE	Maxdome DE	LU	Apple iTunes LU
DE	Videobuster DE	LU	VoD.lu LU
DE	Videoload DE	LV	Apple iTunes LV
DK	Apple iTunes DK	LV	Lattelcom Shortcuts Film LV
DK	Microsoft Film & TV DK	MT	Apple iTunes MT
DK	SF Anytime DK	NL	Apple iTunes NL
DK	Plejmo DK	NL	Microsoft Film & TV NL
EE	Apple iTunes EE	NL	MovieMax Online NL
EE	Starman EE	NL	PathéThuis NL
ES	Apple iTunes ES	NL	Ziggo NL
ES	Microsoft Film & TV ES	PL	ChiliTV PL
ES	RakutenTV ES	PL	Apple iTunes PL
ES	Filmin TVOD ES	PT	Apple iTunes PT
FI	Apple iTunes FI	PT	Vodafone Videoclube PT
FI	Microsoft Film & TV FI	SE	Apple iTunes SE
FR	Apple iTunes FR	SE	Microsoft Film & TV SE
FR	Microsoft Film & TV FR	SE	SF Anytime SE
FR	RakutenTV FR	SE	ComHem SE
FR	Canal VOD FR	SI	Apple iTunes SI
FR	Médiathèque Numérique FR	SI	Voyo SI
FR	UniversCiné France FR	SK	Apple iTunes SK
GB	ChiliTV GB		

Source: European Audiovisual Observatory



2.1.1. Origin of films – General overview

This film figure accounts for each occurrence of a film title in the catalogues. It is the cumulative count of all film titles which were present in the 77 TVOD catalogues and reflects therefore the cumulative share of all films in the catalogues.

On the region of origin of 328 180 films in TVOD catalogues:

Around 29% of all films are of EU origin, with national films accounting on average for 9% and EU non-national for 20%. **Table 4** and **Figure 18**.

Films with an US origin represent on average 51% of the films in TVOD catalogues, followed by films with another international origin with 14% and films with an origin in one of the member of the Observatory not part of the EU with 2% while for 5% of all films no region of origin could be identified.

On the countries of production of 311 686 identified films in TVOD catalogues

When only films with an identified country of production are taken into consideration (and therefore all unidentified films are not part of the film sample), US films take the lion share with 53% of all films, followed in the top 5 by British films (8%), French films (8%), Indian films (4%) and German films (4%)

Table 6

5 other EU countries are in the top 20 of countries of production of films: Italy (3%), Spain (2%), Sweden (1%), Austria (0.9%), Belgium (0.9%), Denmark (0.8%), the Netherlands (0.7%) and Ireland (0.4%)

Furthermore, 2 EUR OBS countries are also in the top 20, Norway with 0.5% and Turkey with 0.4% of all films

The top 20 countries of production represent 92.8% of all films available in TVOD catalogues, with the rest composed of films produced in 134 countries.

When only films produced in the EU 28 are taken into consideration, films produced in EU-5 represent 77% of all EU films. **Table 7**

2.1.1.1. Region of origin of films

The number of films of all catalogues represented 328 180 films. Of these films, films produced in the US accounted for 51%, films produced in the EU 28 for 29% and films produced in other member countries of the European Audiovisual Observatory (such as Russia and Turkey for example) for 2% while other international films accounted for 14% and only 5% of all films were not identified in regard to their country/region of production.

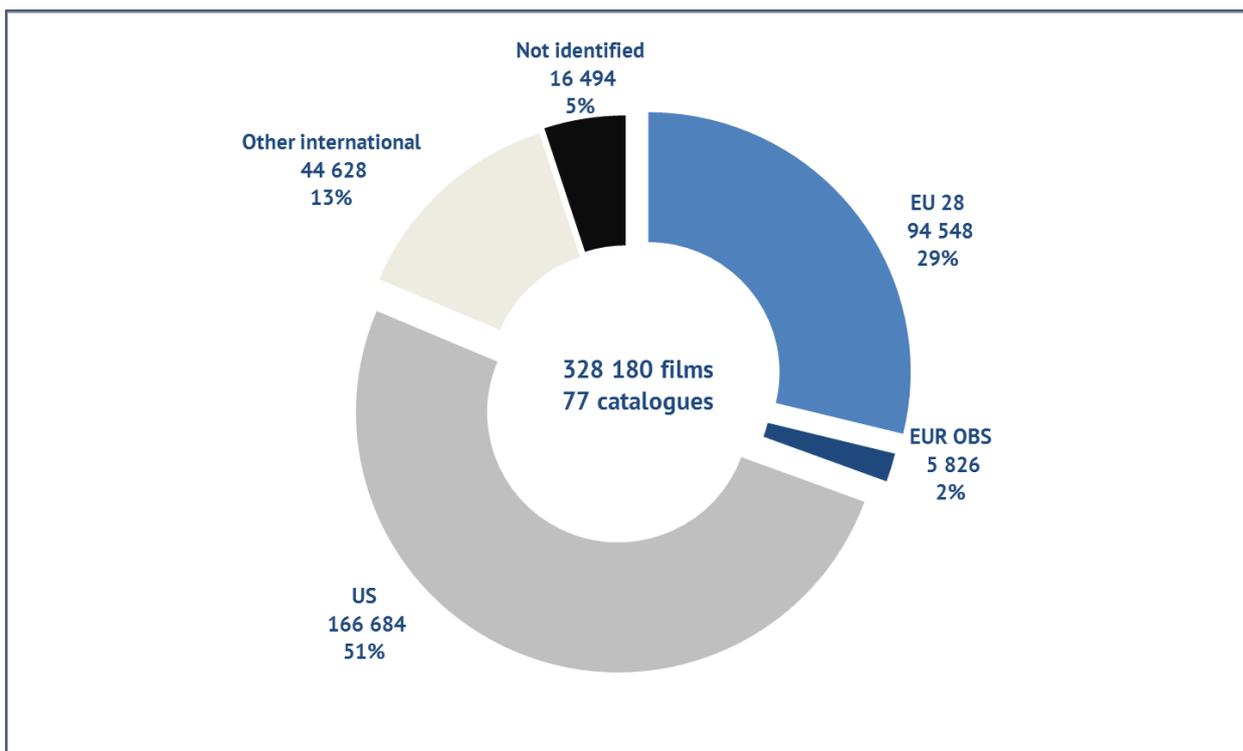
However, this is only the general overview comprising all TVOD catalogues. As the sub-sections on services will show, strong differences between services exist.

Table 4 Origin of 328 180 films in 77 TVOD catalogues

	EU 28	EUR OBS	US	Other international	Not identified	Total
Number of films - 77 TVOD catalogues	94 548	5 826	166 684	44 628	16 494	328 180
<i>In percentage of total</i>	29%	2%	51%	14%	5%	100%

Source: European Audiovisual Observatory

Figure 18 Origin of 328 180 films in 77 TVOD catalogues



Source: European Audiovisual Observatory

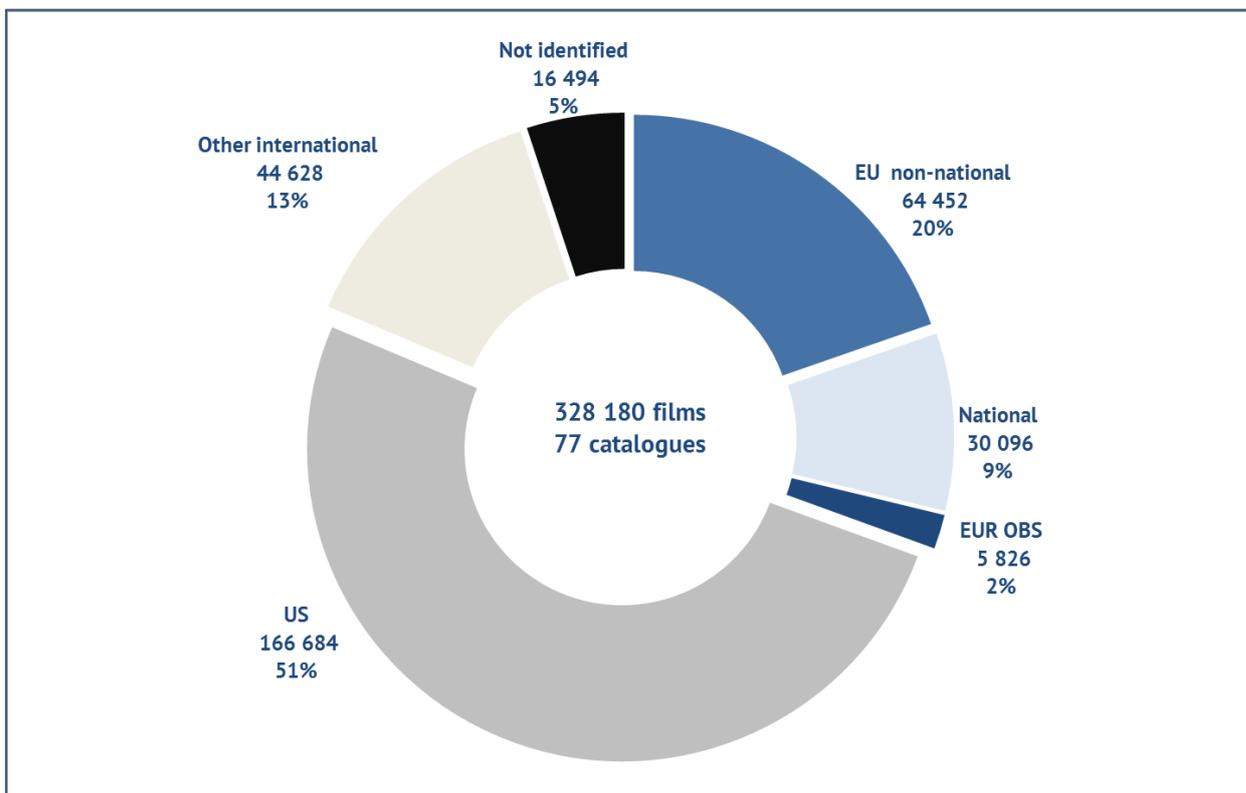
Finally, with regard to EU non-national and national films, 20% of all films in the catalogues were of EU non-national origin and 9% of national origin.

Table 5 Origin of 328 180 films in 77 TVOD catalogues – distinction EU non-national and national

	EU non-national	National	EUR OBS	US	Other international	Not identified	Total
Number of films - 77 TVOD catalogues	64 452	30 096	5 826	166 684	44 628	16 494	328 180
<i>In percentage of total</i>	20%	9%	2%	51%	14%	5%	100%

Source: European Audiovisual Observatory

Figure 19 Origin of 328 180 films in 77 TVOD catalogues – distinction EU non-national and national



Source: European Audiovisual Observatory

National films therefore only represented 31% of EU films in the catalogues on average. However, stark differences between services and even catalogues of the same services exist.

2.1.1.2. Country of origin of films

When only identified films (311 686 identified films) are taken into consideration, these films represent 154 different countries of productions.

The top 10 countries of production represent 85.6% of all films available, with US-originated films accounting alone for 53.5%, followed by films produced in the United Kingdom with 7.7% and those produced in France with 7.5% - the top 10 of countries of production include 3 other EU countries, with Germany at rank 5 (3.5%), followed by Italy (2.9%) and Spain at rank 8 (1.8%).

11 EU countries are in the top 20 country of productions for films available in the 77 TVOD catalogues, and the top 20 producing countries accounted for 92.78% of all films available.



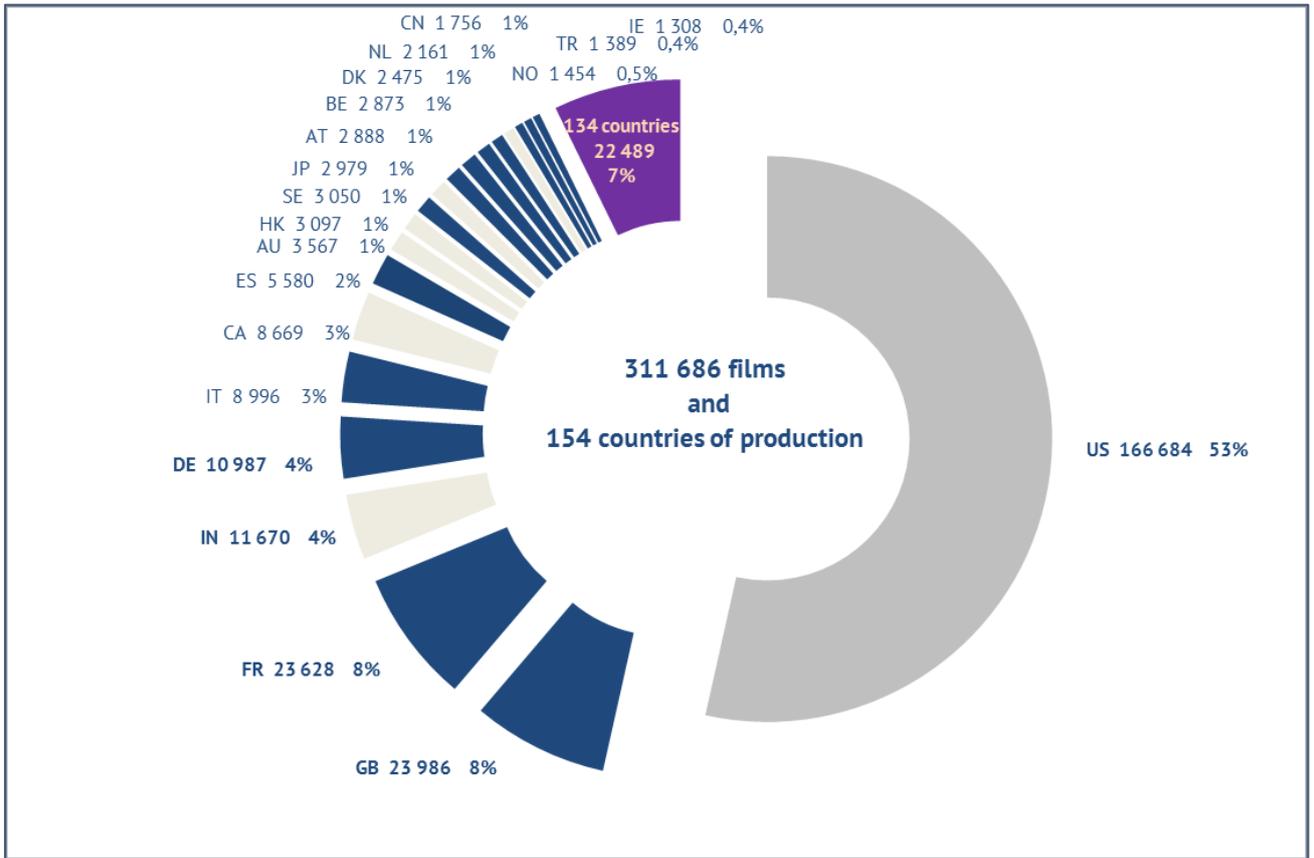
Table 6 Top 20 – Countries of production of films identified in 77 TVOD catalogues

Rank	Country of production	Total films	In % of total films identified	Cumulative %	Region
1	US	166 684	53,5%	53,5%	US
2	GB	23 986	7,7%	61,2%	EU
3	FR	23 628	7,6%	68,8%	EU
4	IN	11 670	3,7%	72,5%	INT
5	DE	10 987	3,5%	76,0%	EU
6	IT	8 996	2,9%	78,9%	EU
7	CA	8 669	2,8%	81,7%	INT
8	ES	5 580	1,8%	83,5%	EU
9	AU	3 567	1,1%	84,6%	INT
10	HK	3 097	1,0%	85,6%	INT
11	SE	3 050	1,0%	86,6%	EU
12	JP	2 979	1,0%	87,6%	INT
13	AT	2 888	0,9%	88,5%	EU
14	BE	2 873	0,9%	89,4%	EU
15	DK	2 475	0,8%	90,2%	EU
16	NL	2 161	0,7%	90,9%	EU
17	CN	1 756	0,6%	91,5%	INT
18	NO	1 454	0,5%	91,9%	EUROBS
19	TR	1 389	0,4%	92,4%	EUROBS
20	IE	1 308	0,4%	92,8%	EU
21-154	134 countries	22 489	7,2%	100,0%	
	Total 154 countries	311 686	100%	100%	

Source: European Audiovisual Observatory



Figure 20 Top 20 – Countries of production of identified films in 77 TVOD catalogues



Source: European Audiovisual Observatory

Taking a closer look at films produced in the 28 Member States of the European Union, the biggest producing countries are also the countries with the most films which were available in the 77 TVOD catalogues.

Films produced in the United Kingdom and France alone make up 50.4% of EU films available; adding Germany, Italy and Spain, the top 5 accounted for 77.4% of all EU films and the top 10 EU producing countries represented 91.6% of all EU films available in the sample of TVOD services. This also explains the relative low percentage of 9% of national films on average; the percentage of national films is higher in the top 5 film producing countries on average than in the rest of EU VOD catalogues and countries.



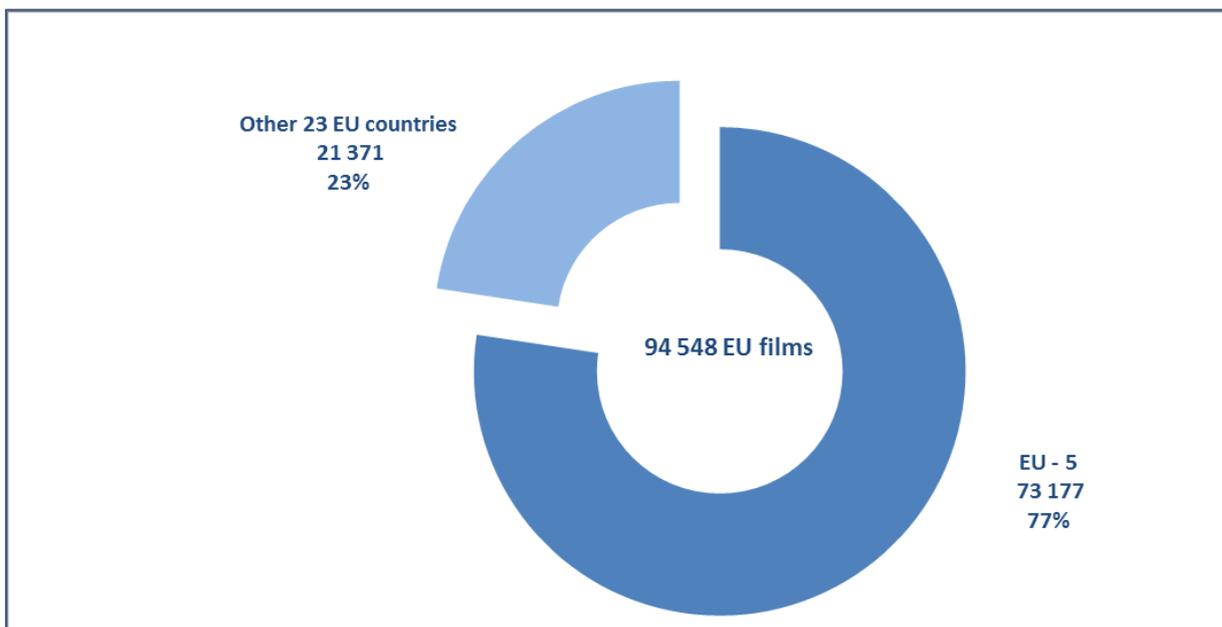
Table 7 Ranking of EU countries by number of films – EU 28

Overall Rank	EU rank	Country of production	Total films	In % of EU films	Cumulative % EU films
2	1	GB	23 986	25,4%	25,4%
3	2	FR	23 628	25,0%	50,4%
5	3	DE	10 987	11,6%	62,0%
6	4	IT	8 996	9,5%	71,5%
8	5	ES	5 580	5,9%	77,4%
11	6	SE	3 050	3,2%	80,6%
13	7	AT	2 888	3,1%	83,7%
14	8	BE	2 873	3,0%	86,7%
15	9	DK	2 475	2,6%	89,3%
16	10	NL	2 161	2,3%	91,6%
20	11	IE	1 308	1,4%	93,0%
23	12	CZ	1 197	1,3%	94,3%
24	13	FI	1 182	1,3%	95,5%
32	14	PL	748	0,79%	96,3%
35	15	HU	546	0,58%	96,9%
36	16	RO	518	0,55%	97,4%
37	17	PT	485	0,51%	97,9%
38	18	LT	453	0,48%	98,4%
44	19	BG	293	0,31%	98,7%
45	20	LU	275	0,29%	99,0%
49	21	GR	192	0,20%	99,2%
50	22	EE	169	0,18%	99,4%
51	23	HR	147	0,16%	99,6%
52	24	SI	138	0,15%	99,7%
54	25	SK	125	0,13%	99,8%
58	26	LV	112	0,12%	100,0%
93	27	CY	27	0,03%	100,0%
115	28	MT	9	0,01%	100,0%
-	-	Total EU 28	94 548	100%	100%

Source: European Audiovisual Observatory

(84% of all Lithuanian films are found in a specialized Lithuanian service, Kino Fondas which has a share of 93% national films representing Lithuanian 379 films)

Figure 21 EU films – EU-5 and Rest of the EU compared to EU film volume



Source: European Audiovisual Observatory

2.1.2. Origin of film titles – General overview

Unique film title count: For this figure, a film title is only counted once, regardless of occurrences in the catalogue. This measurement is useful to give an overview on the variety of film titles present in the 77 TVOD catalogues and is used in the circulation section to explain why, despite having a higher share in unique film titles, the cumulative volume of EU films is lower than those of other regions of origin.

On the regions of origin of 63 591 unique film titles in the 77 TVOD catalogues

42% of all film titles are of EU origin, followed by US film titles with 31%, international film titles with 12% and EUR OBS film titles with 2%. Around 13% of film titles were not identified. **Table 8**

On the countries of production of 55 291 identified unique film titles

US unique film titles represented 36% of all film titles, followed in the top 5 by titles produced in France (11%), the United Kingdom (7%), Italy (7%) and Germany (6%). **Table 9**

7 other EU countries and 1 EUR OBS country are in the top 20 of unique film titles: Spain (4%), Austria (2.5%), Belgium (2%), Sweden (1.5%), Denmark (1.3%), the Netherlands (1%), Lithuania (0.7%) and Switzerland (0.6%)

Canadian film titles with 2.8% are at the 7th rank, while Indian films rank 10th with 990 titles or 1.8% of all titles, closely followed by Japanese titles (1.6%).



The rest of the top 20 production countries of unique film titles are Australia, Hong Kong, South Korea and China.

The top 20 represents 90% of all unique film titles, with 134 other countries accounting for 5 306 unique titles.

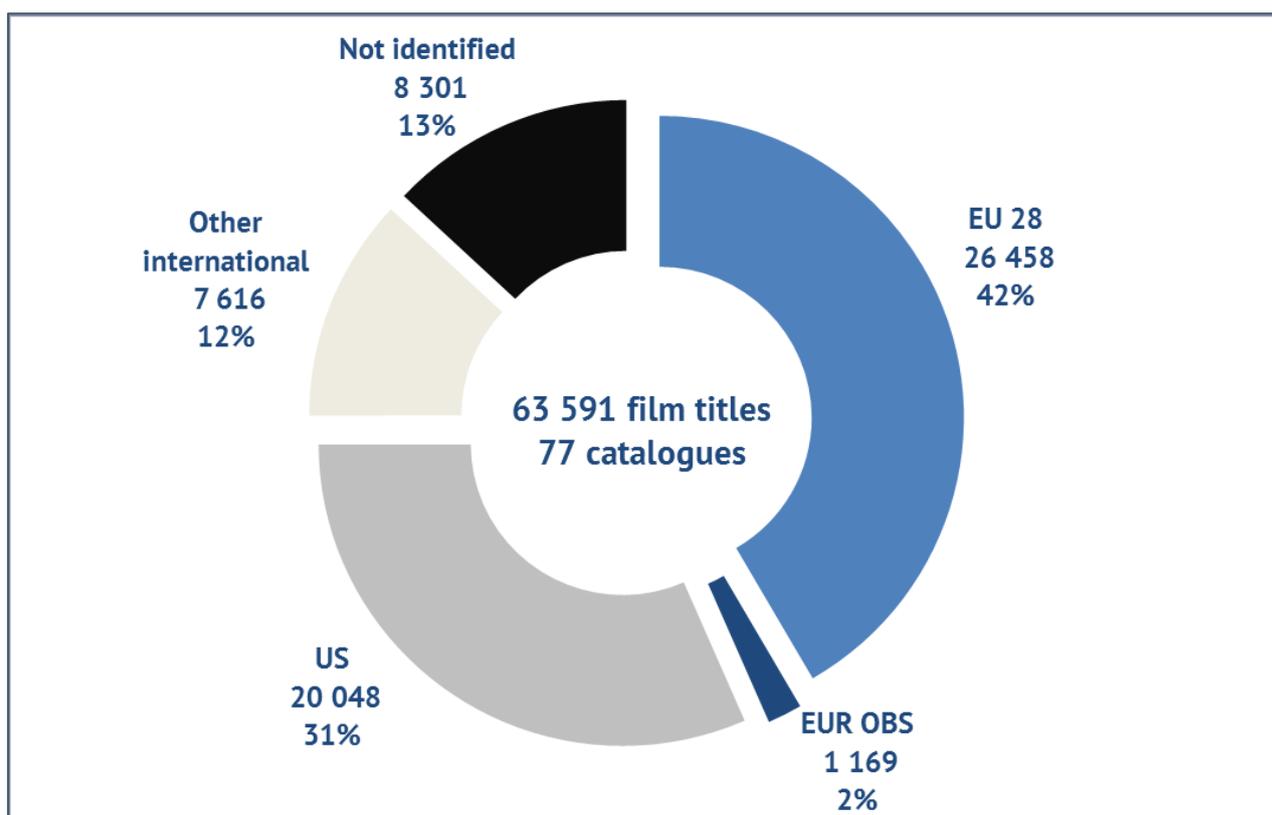
When only EU film titles are taken into consideration, films of EU-5 account for 74% of all EU unique film titles. **Table 10**

Table 8 Origin of 63 591 films titles in 77 TVOD catalogues

	EU 28	EUR OBS	US	Other international	Not identified	Total
Number of film titles 77 TVOD catalogues	26 458	1 169	20 048	7 616	8 301	63 591
<i>In percentage of total</i>	42%	2%	32%	12%	13%	100%

Source: European Audiovisual Observatory

Figure 22 Origin of 63 591 films titles in 77 TVOD catalogues



Source: European Audiovisual Observatory

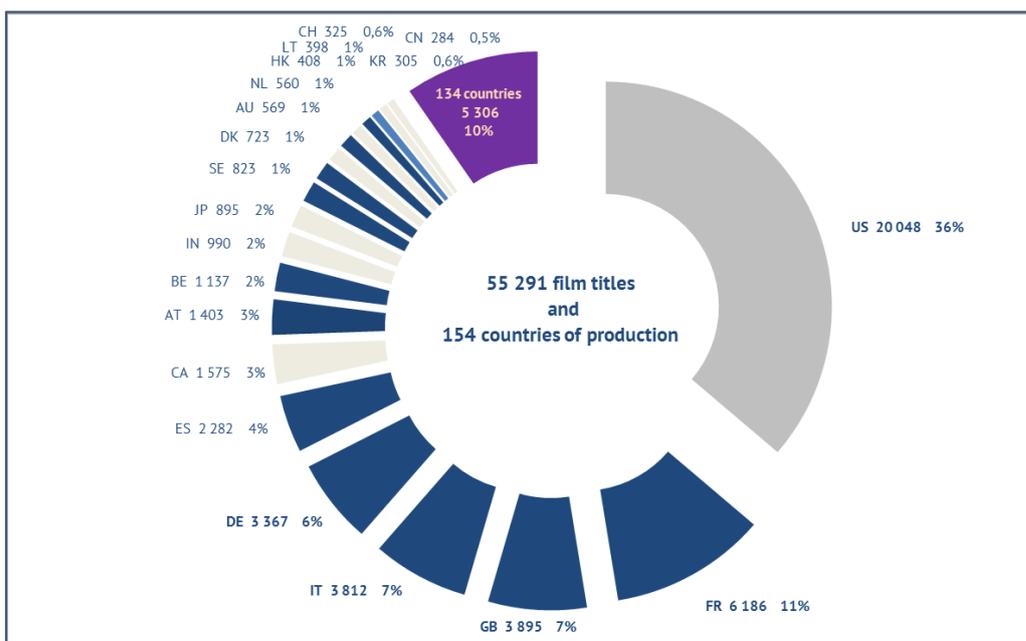


Table 9 Top 20 – Countries of production of identified film titles in 77 TVOD catalogues

Rank	Country of production	Total film titles	In % of total film titles identified	Cumulative %	Region
1	US	20 048	36,3%	36,3%	US
2	FR	6 186	11,2%	47,4%	EU
3	GB	3 895	7,0%	54,5%	EU
4	IT	3 812	6,9%	61,4%	EU
5	DE	3 367	6,1%	67,5%	EU
6	ES	2 282	4,1%	71,6%	EU
7	CA	1 575	2,8%	74,5%	INT
8	AT	1 403	2,5%	77,0%	EU
9	BE	1 137	2,1%	79,0%	EU
10	IN	990	1,8%	80,8%	INT
11	JP	895	1,6%	82,5%	INT
12	SE	823	1,5%	83,9%	EU
13	DK	723	1,3%	85,3%	EU
14	AU	569	1,0%	86,3%	INT
15	NL	560	1,0%	87,3%	EU
16	HK	408	0,7%	88,0%	INT
17	LT	398	0,7%	88,8%	EU
18	CH	325	0,6%	89,3%	EUROBS
19	KR	305	0,6%	89,9%	INT
20	CN	284	0,5%	90,4%	INT
21-154	134 countries	5 306	9,6%	100,0%	
	Total 154 countries	55 291	100%	100%	

Source: European Audiovisual Observatory

Figure 23 Top 20 – Countries of production of identified film titles in 77 TVOD catalogues



Source: European Audiovisual Observatory

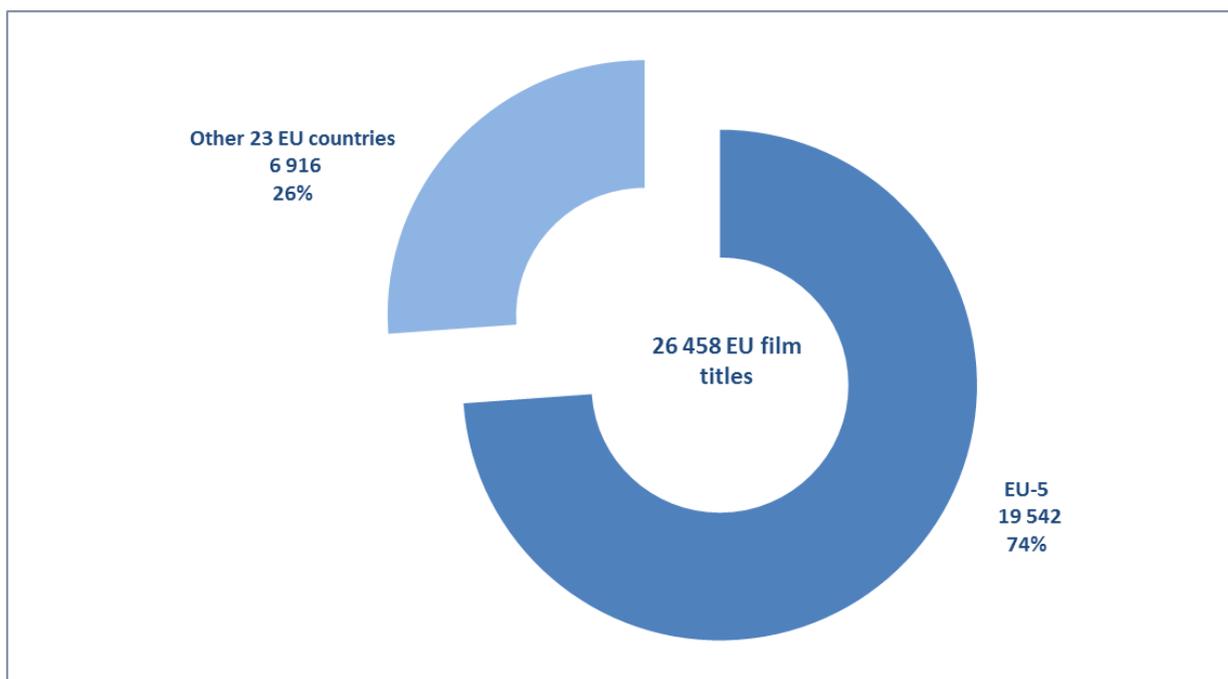


Table 10 Ranking of EU countries by number of film titles – EU 28

Overall Rank	EU Rank	Country of production	Total film titles	In % of total EU film titles identified	Cumulative %
2	1	FR	6 186	23,4%	23,4%
3	2	GB	3 895	14,7%	38,1%
4	3	IT	3 812	14,4%	52,5%
5	4	DE	3 367	12,7%	65,2%
6	5	ES	2 282	8,6%	73,9%
8	6	AT	1 403	5,3%	79,2%
9	7	BE	1 137	4,3%	83,5%
12	8	SE	823	3,1%	86,6%
13	9	DK	723	2,7%	89,3%
15	10	NL	560	2,1%	91,4%
17	11	LT	398	1,5%	92,9%
23	12	CZ	274	1,0%	94,0%
25	13	PT	256	1,0%	94,9%
26	14	FI	252	0,95%	95,9%
29	15	IE	211	0,80%	96,7%
30	16	PL	183	0,69%	97,4%
32	17	HU	170	0,64%	98,0%
37	18	LU	109	0,41%	98,4%
39	19	RO	102	0,39%	98,8%
45	20	GR	58	0,22%	99,0%
48	21	BG	51	0,19%	99,2%
49	22	SI	50	0,19%	99,4%
51	23	EE	48	0,18%	99,6%
52	24	HR	40	0,15%	99,7%
55	25	SK	33	0,12%	99,9%
58	26	LV	29	0,11%	100,0%
95	27	CY	4	0,02%	100,0%
112	28	MT	2	0,01%	100,0%
-	-	Total EU 28	26 458	100%	100%

Source: European Audiovisual Observatory

Figure 24 EU films – EU-5 and Rest of the EU compared to EU film volume



Source: European Audiovisual Observatory

2.2. TVOD service catalogues – detailed overview of the origin of films

In this section, each occurrence of a film title is counted. It is the cumulative count of all films present in the 77 TVOD catalogues.

National and multi-country TVOD services compared

A split between TVOD services operating in multiple countries (multi-country services (M-C) with 5 services and 49 country catalogues) and national services available in a single country (28 services) is made to permit a comparison between these differently focused TVOD services. Details on catalogues are provided in sub-sections 1.9.1 and 1.9.2. as strong differences exist even between services and catalogues of the same category or even company.

On average, the share of EU 28 films was 45% for national services and 23% for multi-country services (overall average 29%). The same differences are seen for national films, with 19% for national services and 6% for multi-country services (overall share 9%) and EU non-national films (national services 16%, M-C services 18%). **Figure 25**

The proportion of national films of EU 28 films shows the same stark differences with 42% for national services, showing a higher relevance of national films to their customers, and 25% for M-C services, which offer national films in the



bigger film producing countries while mainly relying on EU non-national films in other countries. (Overall share 31%) **Figure 26**

Both types of services have the same share of EUROBS films with 2%.

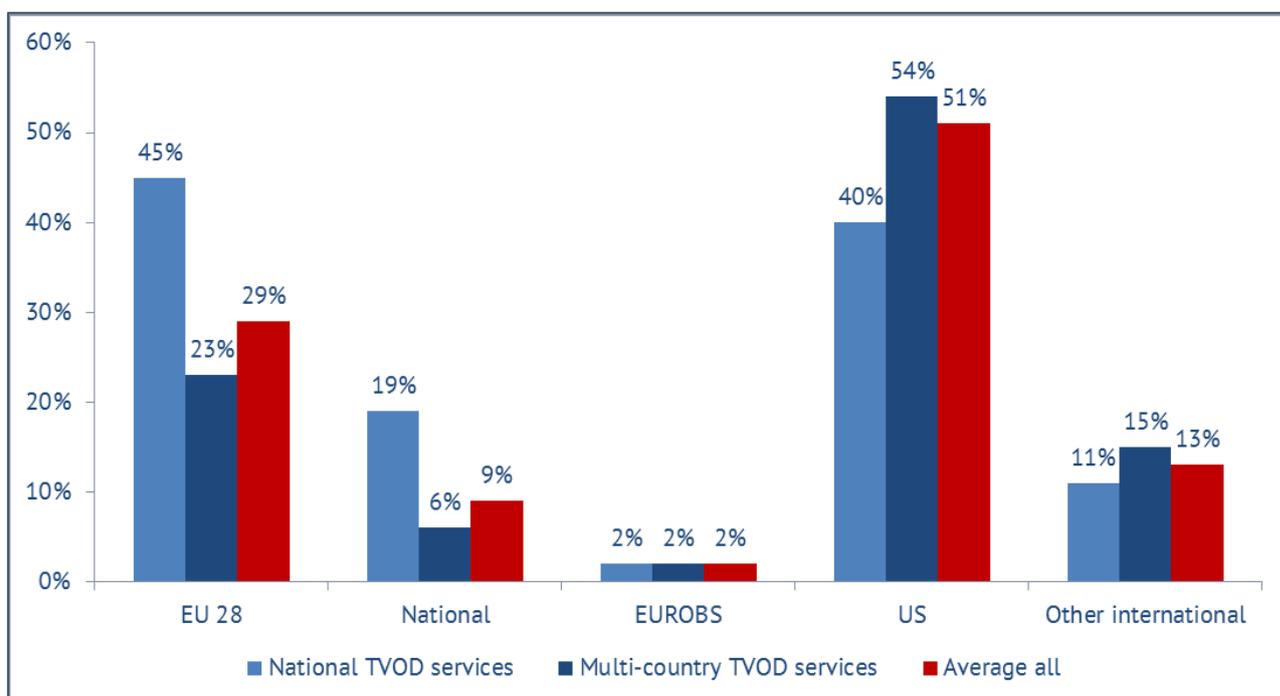
When it comes to US films, these represent 40% of films in national services' catalogues and 54% in these of M-C services. Other international films accounted for 11% in the catalogues of national services and 15% in these of M-C services, mainly driven by Apple's iTunes. **Figure 25**

Finally, the sizes of the catalogues show also strong differences, with national services having on average 2 967 films and M-C services 5 046, for an overall average per TVOD service of 4 307 films. However, in both categories extreme differences exist. **Figure 27**

National films tend to be more present in EU-5 countries; services in France and the United Kingdom rely more on national films than EU non-national for EU 28 films. US films can be found in most services, except these specialising on national and/or EU films.

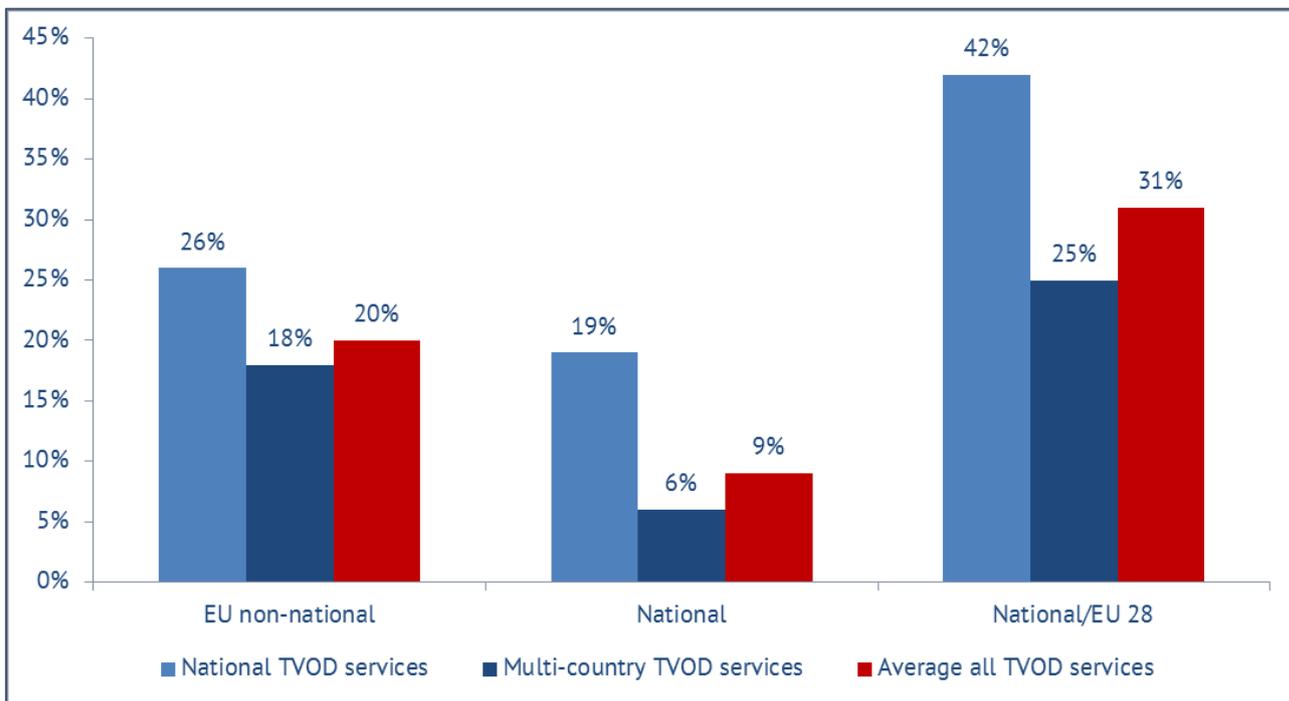
EU 28 films are found more in national services than services operating in multiple countries. However, European oriented services such as ChiliTV, Rakuten TV (former Wuaki.tv) or SF Anytime boost also a high share around 30% of EU films on average.

Figure 25 Comparison national and multi-country services, average shares of origin of films, in percentages



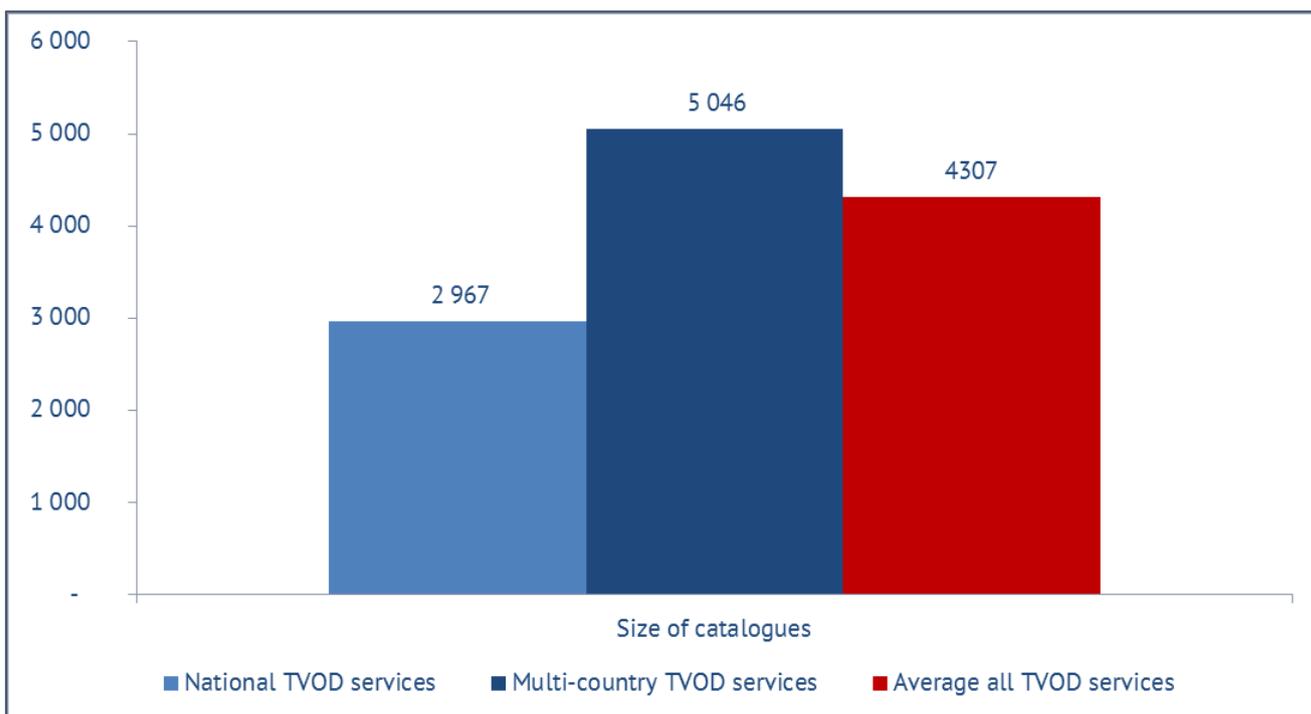
Source: European Audiovisual Observatory

Figure 26 Comparison national and multi-country services, EU non-national and national films, in percentages



Source: European Audiovisual Observatory

Figure 27 Average sizes of film catalogues, in numbers



Source: European Audiovisual Observatory

2.2.1. 28 National TVOD services

Overall shares of 28 national TVOD services

45% of all films are of EU28 origin of which 19% are national films. US films represent on average 40% and other international films 11%. **Table 12**

However, a great disparity between services can be seen. Several are specialised in art house films and independent, others operated by telecommunications companies or by media groups which explains these disparities.

Noticeable points on EU 28, national and EU non-national films

Catalogue sizes vary from over 5 000 films for UniversCiné Belgium and France, Plejmo DK, SkyStore, Canal VOD, Videoload and Filmin to under and around 400 titles in the catalogues of Kino Fondas, ComHem, MovieMax, Kino VOD Club and Cytavision VOD. **Table 11**

11 services have a share of EU 28 films above the average of 45%, with 6 services having even more than 2/3 of the overall film offer of EU 28 origin. **Figure 28**

At the same time, 11 services have an EU 28 film offer below 30%, with Cytavision having only 6% of films of EU 28 origin.

The same differences can be seen when it comes to national films – 8 services have more than 19% of national films, with the crown going to specialised TVOD services Kino Fondas (93%) and Kino VOD Club (79%). The French services Médiathèque Numérique and UniversCiné France boost also more than 40% of national content. **Figure 29**

17 services meanwhile, have less than 15% of national films, mostly from smaller film producing countries (such as CY, HR, LV, LU, EE, SI) but also from medium to bigger once (GB, DE, NL, DK, BE, PT). Most of these services are operated by telecom players. **Figure 29**

Around 26% of films are of EU non-national origin for these services, also with large differences; 63% for VoD.lu and 47% for UniversCiné Belgium to less than 10% for TalkTalk, Sky Store, Kino Fondas and Cytavision. **Figure 30**

Finally when the proportion of national films in the offer of EU 28 films is considered, the average for these services is that a share of 42% of all EU 28 films are of national origin. This share rises to over 60% for services located in the 2 biggest film producing countries France and the United Kingdom, or specialised in national content (for UniversCiné France, Canal VOD, Sky Store, Médiathèque Numérique, Kino VOD Club and Kino Fondas). **Figure 31**

Again, strong variations can be seen, as **Matrix 2** shows.



Table 11 28 National TVOD services – films by origin, in numbers

Name of TVOD service - Country	EU 28	EUR OBS	US	Other international	Not identified	Total	of which national
Belgacom Proximus TVOD BE	262	15	250	50	2	579	18
Canal VOD FR	3 745	82	3 085	628	6	7 546	2 374
ComHem SE	99	15	223	22	22	381	12
Cytavision VoD CY	8	-	119	1	-	128	-
Filmin TVOD ES	5 080	184	2 470	1 099	7	8 840	1 587
Flimmit TVOD AT	2 454	105	339	192	7	3 097	1 199
Kino Fondas LT	406	2	-	-	-	408	379
Kino VOD Club AT	181	2	1	4	-	188	148
Lattelcom Shortcuts Film LV	103	18	432	67	51	671	14
Maxdome DE	1 433	88	1 216	442	52	3 231	816
MaxTV HR	477	36	896	168	98	1 675	19
Médiathèque Numérique FR	2 437	133	305	595	1	3 471	1 573
MovieMax Online NL	58	3	94	12	25	192	26
O2 Videotéka CZ	166	11	457	19	30	683	83
PathéThuis NL	597	13	1 217	99	43	1 969	244
Plejmo DK	1 507	95	2 975	481	385	5 443	75
Sky Store GB	1 239	50	3 974	489	238	5 990	787
Starman EE	165	23	412	31	-	631	25
TalkTalk GB	799	39	2 360	376	221	3 795	423
UniversCiné Belgium BE	3 349	128	1 038	758	-	5 273	891
UniversCiné France FR	4 155	203	771	909	2	6 040	2 529
Videobuster DE	1 288	70	925	202	1	2 486	596
Videoload DE	2 720	157	4 785	882	73	8 617	1 059
VoD.lu LU	1 733	63	457	369	-	2 622	85
Vodafone Videoclube PT	1 429	51	2 010	446	556	4 492	204
Voyo SI	152	11	274	101	163	701	34
Ziggo NL	236	15	535	47	120	953	70
Total 28 national TVOD services	36 278	1 612	31 620	8 489	2 103	80 102	15 270

Source: European Audiovisual Observatory



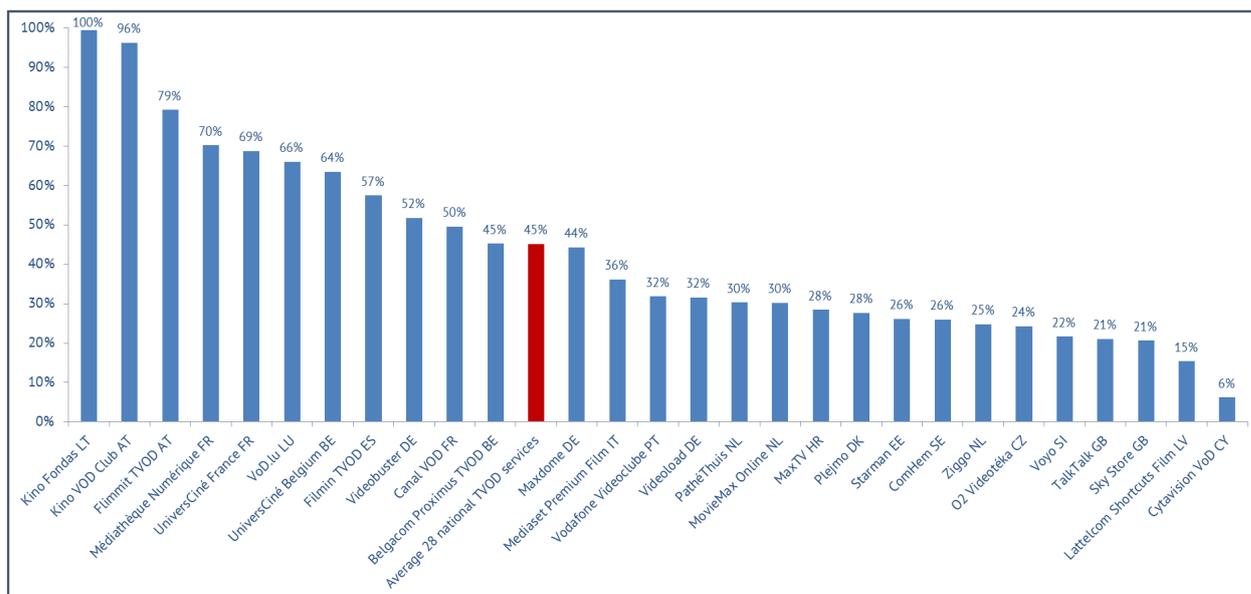
Table 12 28 National TVOD services – films by origin, in percentages

Name of TVOD service - Country	EU 28	EUR OBS	US	Other international	Not identified	Total	of which national
Belgacom Proximus TVOD BE	45%	3%	43%	9%	0%	100%	3%
Canal VOD FR	50%	1%	41%	8%	0%	100%	31%
ComHem SE	26%	4%	59%	6%	6%	100%	3%
Cytavision VoD CY	6%	0%	93%	1%	0%	100%	0%
Filmin TVOD ES	57%	2%	28%	12%	0%	100%	18%
Flimmit TVOD AT	79%	3%	11%	6%	0%	100%	39%
Kino Fondas LT	100%	0%	0%	0%	0%	100%	93%
Kino VOD Club AT	96%	1%	1%	2%	0%	100%	79%
Lattelcom Shortcuts Film LV	15%	3%	64%	10%	8%	100%	2%
Maxdome DE	44%	3%	38%	14%	2%	100%	25%
MaxTV HR	28%	2%	53%	10%	6%	100%	1%
Mediaset Premium Film IT	36%	1%	53%	7%	2%	100%	21%
Médiathèque Numérique FR	70%	4%	9%	17%	0%	100%	45%
MovieMax Online NL	30%	2%	49%	6%	13%	100%	14%
O2 Videotéka CZ	24%	2%	67%	3%	4%	100%	12%
PathéThuis NL	30%	1%	62%	5%	2%	100%	12%
Plejmo DK	28%	2%	55%	9%	7%	100%	1%
Sky Store GB	21%	1%	66%	8%	4%	100%	13%
Starman EE	26%	4%	65%	5%	0%	100%	4%
TalkTalk GB	21%	1%	62%	10%	6%	100%	11%
UniversCiné Belgium BE	64%	2%	20%	14%	0%	100%	17%
UniversCiné France FR	69%	3%	13%	15%	0%	100%	42%
Videobuster DE	52%	3%	37%	8%	0%	100%	24%
Videoload DE	32%	2%	56%	10%	1%	100%	12%
VoD.lu LU	66%	2%	17%	14%	0%	100%	3%
Vodafone Videoclube PT	32%	1%	45%	10%	12%	100%	5%
Voyo SI	22%	2%	39%	14%	23%	100%	5%
Ziggo NL	25%	2%	56%	5%	13%	100%	7%
Total 28 national TVOD services	45%	2%	40%	11%	3%	100%	19%

Source: European Audiovisual Observatory

2.2.1.1. Focus on the share of EU 28 films, national and EU non-national

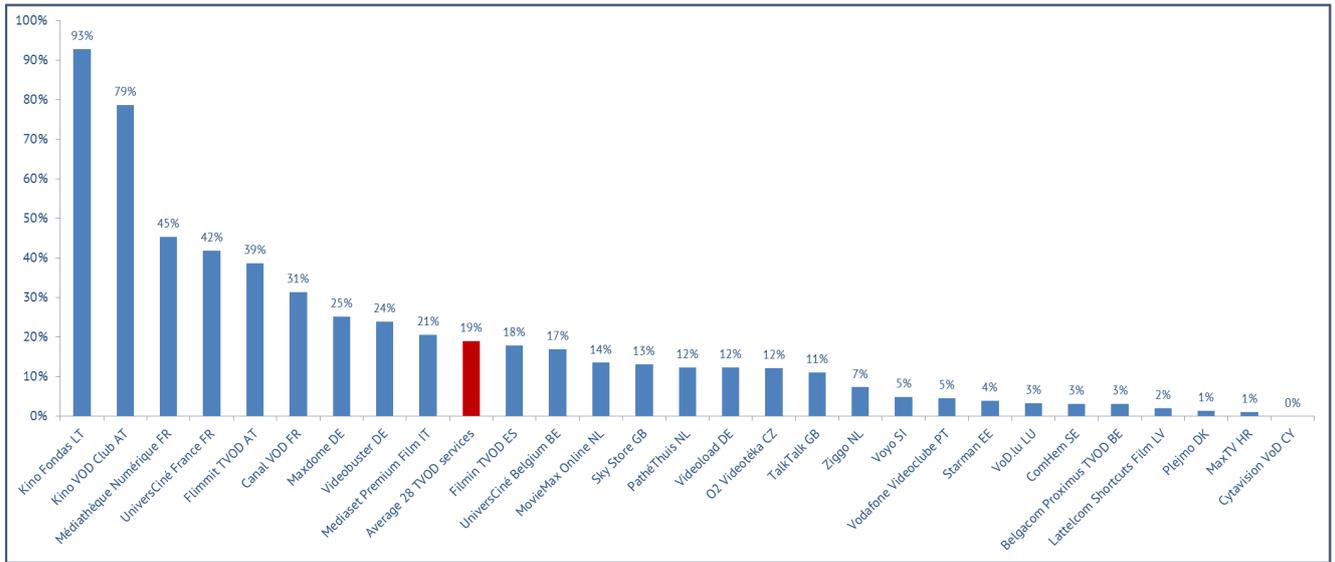
Figure 28 28 national TVOD services - Share of EU 28 films



Source: European Audiovisual Observatory

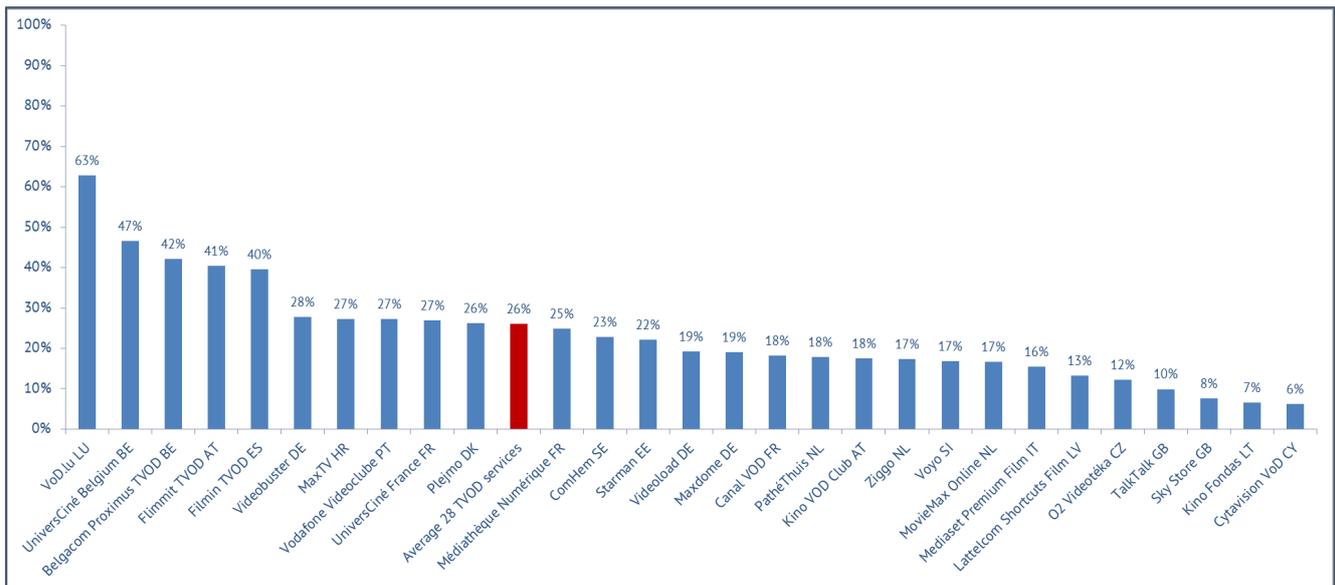


Figure 29 28 national TVOD services Share of national films



Source: European Audiovisual Observatory

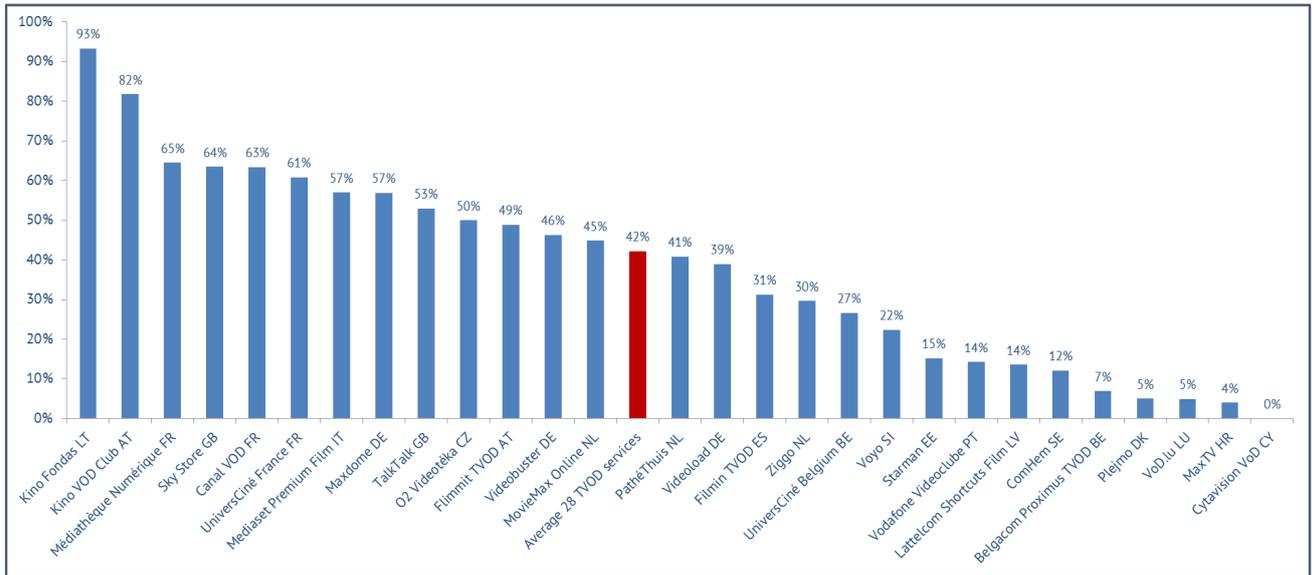
Figure 30 28 national TVOD services - Share of EU non-national films



Source: European Audiovisual Observatory

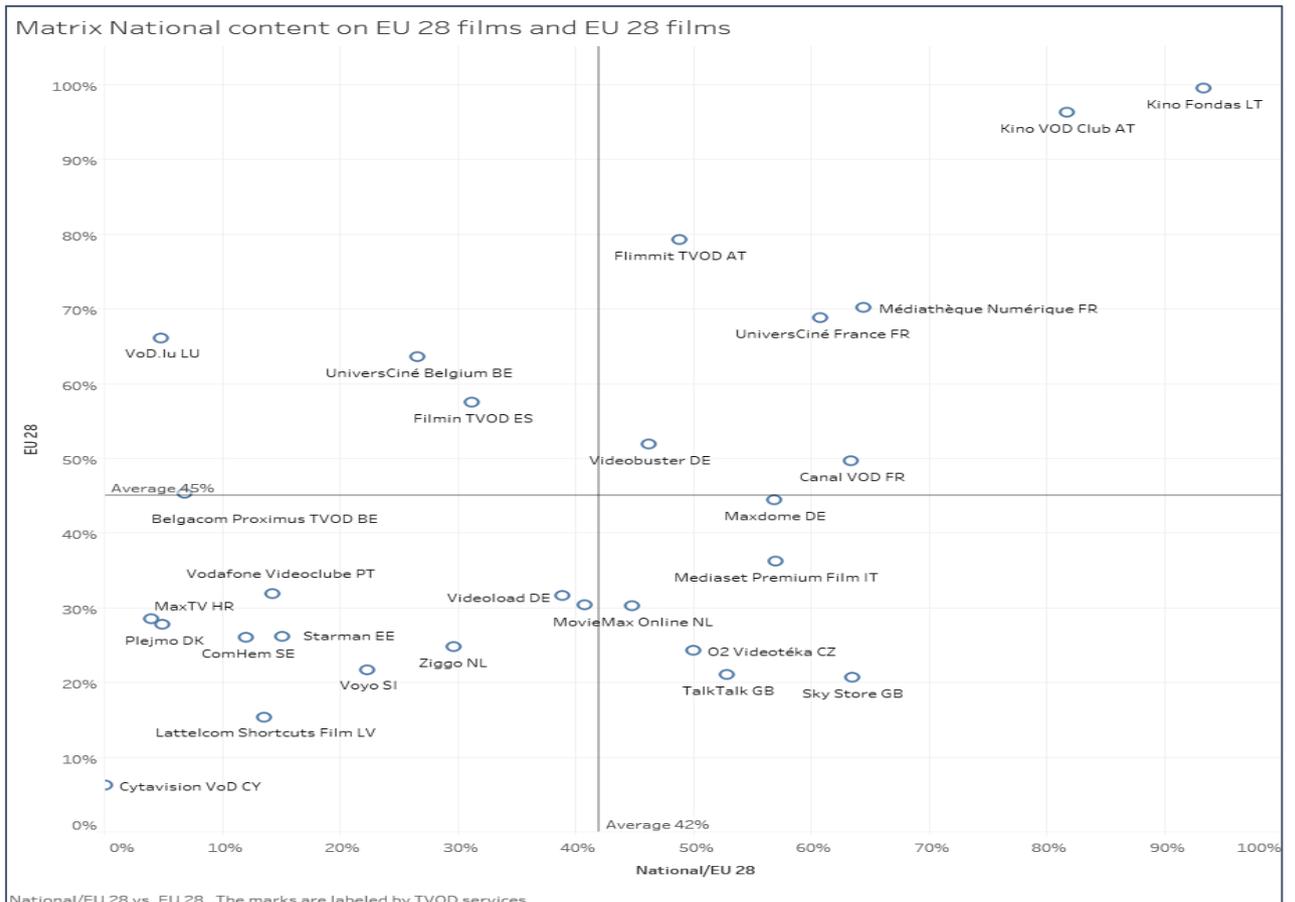


Figure 31 28 national TVOD services - Proportion of national films in EU 28 films



Source: European Audiovisual Observatory

Matrix 2 28 national TVOD services - Proportion of national films in EU 28 films and share of EU 28 films



Source: European Audiovisual Observatory

2.2.2. 49 Multi-country TVOD services

Overall composition of 49 multi-country TVOD catalogues of 5 services

23% of all films are of EU 28 origin, with the average shares ranging from 30% and 29% for the catalogues of ChiliTV, Rakuten TV and SF Anytime to 22% for the 25 Apple iTunes' catalogues and 16% for the 12 catalogues of Microsoft's Film and TV TVOD services. **Table 13**

6% of films are of national origin on average, here again with differences; while Rakuten TV (14%) and Chili TV (13%) have a comparatively higher share of national films in their catalogues, Microsoft (6%), SF Anytime (5%) and iTunes (4%) carry lower shares. These differences come also from the presence of the largest catalogues in smaller film producing countries; while iTunes has 19% and 13% of national films in France and Italy, and Microsoft 12% in the UK, the services have together 14 catalogues in which the share of national films is around 0% (in MT, LT, SI, EE, GR, LV, SK, BG, PT, HU, LU, PL, IE for iTunes, AT and BE for Microsoft). **Table 15 Table 17**

54% of the films in these catalogues are of US origin, with an average of 50% and 51% for SF Anytime and iTunes, to 62% and 63% for ChiliTV and Rakuten TV to over 74% for Microsoft's 12 catalogues. The range of the share of US films extends from 41% in the catalogue of iTunes in Austria to over 80% in the catalogues of Microsoft catalogues in 7 countries and ChiliTV's in the UK.

International films' shares vary also widely in the 49 catalogues. Apple's iTunes emerges as a distributor of international films with an average share of 18% of all films in its catalogues, while the other catalogues have on average between 7% and 9% of international films.

Noticeable points on EU 28, national and EU non-national films

The sizes of the catalogues are also an important factor; while iTunes has on average 6 689 films in its catalogues (from 4 256 in PL to over 10 000 in BE, DE, AT, GB and IE), Microsoft has a much lower average with 1 116 films (from 534 in NL to 3 633 in FR). ChiliTV, which boosts on average around 6 000 films, has 15 247 films in its Italian catalogue (the most of any TVOD service) to 2 584 in PL. SF Anytime has on average 7 674 films in its 2 catalogues in DK and SE while Rakuten TV has an average size of 4 260 films **Table 13 Table 14 Table 16**

While the overall share of EU 28 films is lower than for national services (22% compared to 45%), 16 catalogues have a share higher than the 22% average, with ChiliTV Italy at 40%, Rakuten TV France at 35%, iTunes France (34%) and Germany (32%) and Rakuten Germany (32%) having quite significant shares. **Figure 32**

On the other hand, 16 catalogues have also an EU 28 share below 16% - 8 Microsoft catalogues, 7 iTunes catalogues and the catalogue of ChiliTV in the UK. **Figure 32**



While national TVOD services had an average share of 19% of national films, the share for multi-country services falls to 6% on average. 32 catalogues had a share below 5% of national films, often in smaller film producing countries. However, 10 catalogues have a share of national films above 10% and these for catalogues in France, Italy, the United Kingdom and Germany. The national film production seems to influence the share of national films for multi-country services. SF Anytime in Sweden had 7% of national films, while this share fell to 3% in its Danish catalogue. **Figure 33**

With lower shares of national films, the catalogues of these services are however counting on EU non-national films to offer EU films to their customers, with 18% of EU non-national films in the catalogues on average. The catalogues of iTunes AT (28%) and iTunes BE (25%) have the highest share, with mostly films from respectively Germany and France/the Netherlands accounting for these high shares (shared languages). This is also the case for the catalogues of SF Anytime DK (24%) and SE (23%), or iTunes IE (23%), LU (21%) and DE (21%). On the other hand, the catalogues of several services in the United Kingdom have the lowest share of EU non-national films with Rakuten (8%), Microsoft (5%) and ChiliTV (5%). Even the British catalogue of iTunes share (10%) is much lower than the average iTunes catalogue share (18%). **Figure 34**

The low shares of catalogues in the UK of EU non-national films come to light when the proportion of national films of EU 28 films is observed. The British catalogues of EU 28 films are composed of 71% for Microsoft, 57% for Rakuten, 62% for ChiliTV and 56% for iTunes of national films. The French catalogues of Rakuten (61%) and iTunes (56%) boost similar shares. In these countries, the audiences tend to consume national films more than EU non-national, at least on these services. On average, one quarter of EU 28 films are of national origin for the 49 catalogues (42% for the 28 national TVOD catalogues). National films tend to make up the larger part of EU 28 films in bigger film producing countries, and these for all catalogues of the multi-country TVOD services. This is the case in the United Kingdom, France, Italy and Germany. **Figure 34**

Finally, the matrix which shows EU 28 shares and the shares of national films in EU 28 films indicates this clear distinction. While the catalogues of lower film producing countries tend to be all in the lower quadrant, those of bigger film producing countries are clearly above the averages. This tends to demonstrate a direct link between film volume output of countries and the share of national films in the EU 28 film offering. **Matrix 3**



Table 13 49 multi-country catalogues, Summary of the averages shares of films by region of origin by service, in percentages

	EU 28	EUR OBS	US	Other international	Not identified	Average films in catalogues	of which national
ChiliTV Average 5 catalogues	30%	1%	62%	7%	0%	5 999	13%
iTunes Average 25 catalogues	22%	2%	51%	18%	7%	6 689	4%
Microsoft Average 12 catalogues	16%	1%	74%	7%	3%	1 116	6%
RakutenTV Average 5 catalogues	29%	1%	63%	8%	0%	4 260	14%
SF Anytime Average 2 catalogues	29%	2%	50%	9%	10%	7 674	5%
Average 49 multi-country TVOD catalogues	23%	2%	54%	15%	6%	100%	6%

Source: European Audiovisual Observatory

Table 14 Detail of the country catalogues of ChiliTV, Microsoft, Rakuten and SF Anytime, in figures

Name of TVOD service - Country	EU 28	EUR OBS	US	Other international	Not identified	Total	of which national
ChiliTV AT	934	32	3 011	291	18	4 286	134
ChiliTV DE	869	31	3 030	293	17	4 240	237
ChiliTV GB	451	12	2 999	163	8	3 633	281
ChiliTV IT	6 128	114	7 667	1 267	71	15 247	3 050
ChiliTV PL	473	31	1 965	118	-	2 587	56
Microsoft Film & TV AT	90	6	506	45	8	655	1
Microsoft Film & TV BE	66	2	595	49	9	721	3
Microsoft Film & TV DE	262	8	930	106	22	1 328	82
Microsoft Film & TV DK	70	1	472	23	4	570	24
Microsoft Film & TV ES	71	2	502	27	2	604	16
Microsoft Film & TV FI	75	1	445	31	6	558	19
Microsoft Film & TV FR	695	31	2 450	271	180	3 627	317
Microsoft Film & TV GB	484	20	1 984	233	123	2 844	346
Microsoft Film & TV IE	106	4	518	29	12	669	7
Microsoft Film & TV IT	83	3	534	24	2	646	24
Microsoft Film & TV NL	52	2	450	22	8	534	6
Microsoft Film & TV SE	67	4	523	36	3	633	13
RakutenTV DE	1 361	62	2 500	385	1	4 309	549
RakutenTV ES	1 243	48	3 174	366	-	4 831	397
RakutenTV FR	1 278	39	2 060	237	-	3 614	774
RakutenTV GB	1 151	35	3 227	377	-	4 790	771
RakutenTV IT	1 054	30	2 407	266	-	3 757	427
SF Anytime DK	2 104	136	4 051	690	741	7 722	259
SF Anytime SE	2 300	143	3 622	735	826	7 626	561
Total ChiliTV - 5 catalogues	8 855	220	18 672	2 132	114	29 993	3 758
Total Microsoft - 12 catalogues	2 121	84	9 909	896	379	13 389	858
Total Rakuten TV - 5 catalogues	6 087	214	13 368	1 631	1	21 301	2 918
Total SF Anytime - 2 catalogues	4 404	279	7 673	1 425	1 567	15 348	820

Source: European Audiovisual Observatory



Table 15 Detail of the country catalogues of ChiliTV, Microsoft, Rakuten and SF Anytime, in percentages

Name of TVOD service - Country	EU 28	EUR OBS	US	Other international	Not identified	Total	of which national
ChiliTV AT	22%	1%	70%	7%	0%	4 286	3%
ChiliTV DE	20%	1%	71%	7%	0%	4 240	6%
ChiliTV GB	12%	0%	83%	4%	0%	3 633	8%
ChiliTV IT	40%	1%	50%	8%	0%	15 247	20%
ChiliTV PL	18%	1%	76%	5%	0%	2 587	2%
Microsoft Film & TV AT	14%	1%	77%	7%	1%	655	0%
Microsoft Film & TV BE	9%	0%	83%	7%	1%	721	0%
Microsoft Film & TV DE	20%	1%	70%	8%	2%	1 328	6%
Microsoft Film & TV DK	12%	0%	83%	4%	1%	570	4%
Microsoft Film & TV ES	12%	0%	83%	4%	0%	604	3%
Microsoft Film & TV FI	13%	0%	80%	6%	1%	558	3%
Microsoft Film & TV FR	19%	1%	68%	7%	5%	3 627	9%
Microsoft Film & TV GB	17%	1%	70%	8%	4%	2 844	12%
Microsoft Film & TV IE	16%	1%	77%	4%	2%	669	1%
Microsoft Film & TV IT	13%	0%	83%	4%	0%	646	4%
Microsoft Film & TV NL	10%	0%	84%	4%	1%	534	1%
Microsoft Film & TV SE	11%	1%	83%	6%	0%	633	2%
RakutenTV DE	32%	1%	58%	9%	0%	4 309	13%
RakutenTV ES	26%	1%	66%	8%	0%	4 831	8%
RakutenTV FR	35%	1%	57%	7%	0%	3 614	21%
RakutenTV GB	24%	1%	67%	8%	0%	4 790	16%
RakutenTV IT	28%	1%	64%	7%	0%	3 757	11%
SF Anytime DK	27%	2%	52%	9%	10%	7 722	3%
SF Anytime SE	30%	2%	47%	10%	11%	7 626	7%
Total ChiliTV - 5 catalogues	30%	1%	62%	7%	0%	29 993	13%
Total Microsoft - 12 catalogues	16%	1%	74%	7%	3%	13 389	6%
Total Rakuten TV - 5 catalogues	29%	1%	63%	8%	0%	21 301	14%
Total SF Anytime - 2 catalogues	29%	2%	50%	9%	10%	15 348	5%

Source: European Audiovisual Observatory

Table 16 Detail of the country catalogues of Apple's iTunes, in figures

Name of TVOD service - Country	EU 28	EUR OBS	US	Other international	Not identified	Total	of which national
iTunes AT	3 343	251	4 670	1 859	1 277	11 400	163
iTunes BE	2 653	198	4 800	1 620	789	10 060	124
iTunes BG	772	118	2 605	1 158	278	4 931	5
iTunes CZ	950	119	2 921	1 194	435	5 619	113
iTunes DE	3 221	242	4 468	998	1 164	10 093	1 108
iTunes DK	1 573	110	3 250	1 161	413	6 507	425
iTunes EE	796	119	2 834	1 218	290	5 257	3
iTunes ES	954	62	2 801	373	346	4 536	183
iTunes FI	1 280	96	3 417	1 241	321	6 355	108
iTunes FR	2 936	166	3 851	869	921	8 743	1 638
iTunes GB	2 356	234	5 678	2 246	971	11 485	1 194
iTunes GR	776	120	2 736	1 130	303	5 065	3
iTunes HU	785	106	2 703	1 104	263	4 961	6
iTunes IE	2 673	259	6 284	2 220	774	12 210	82
iTunes IT	1 432	59	2 641	365	346	4 843	643
iTunes LT	759	114	2 554	1 096	242	4 765	1
iTunes LU	1 939	178	4 760	1 584	733	9 194	14
iTunes LV	745	116	2 360	1 059	250	4 530	3
iTunes MT	933	120	3 158	1 425	349	5 985	-
iTunes NL	1 176	103	2 718	401	288	4 686	244
iTunes PL	834	117	2 863	1 197	312	5 323	13
iTunes PT	622	45	2 315	1 017	257	4 256	5
iTunes SE	1 395	157	3 702	1 297	389	6 940	216
iTunes SI	739	98	2 348	1 071	235	4 491	2
iTunes SK	861	101	2 563	1 092	365	4 982	5
Total iTunes - 25 catalogues	36 503	3 408	85 000	29 995	12 311	167 217	6 301

Source: European Audiovisual Observatory



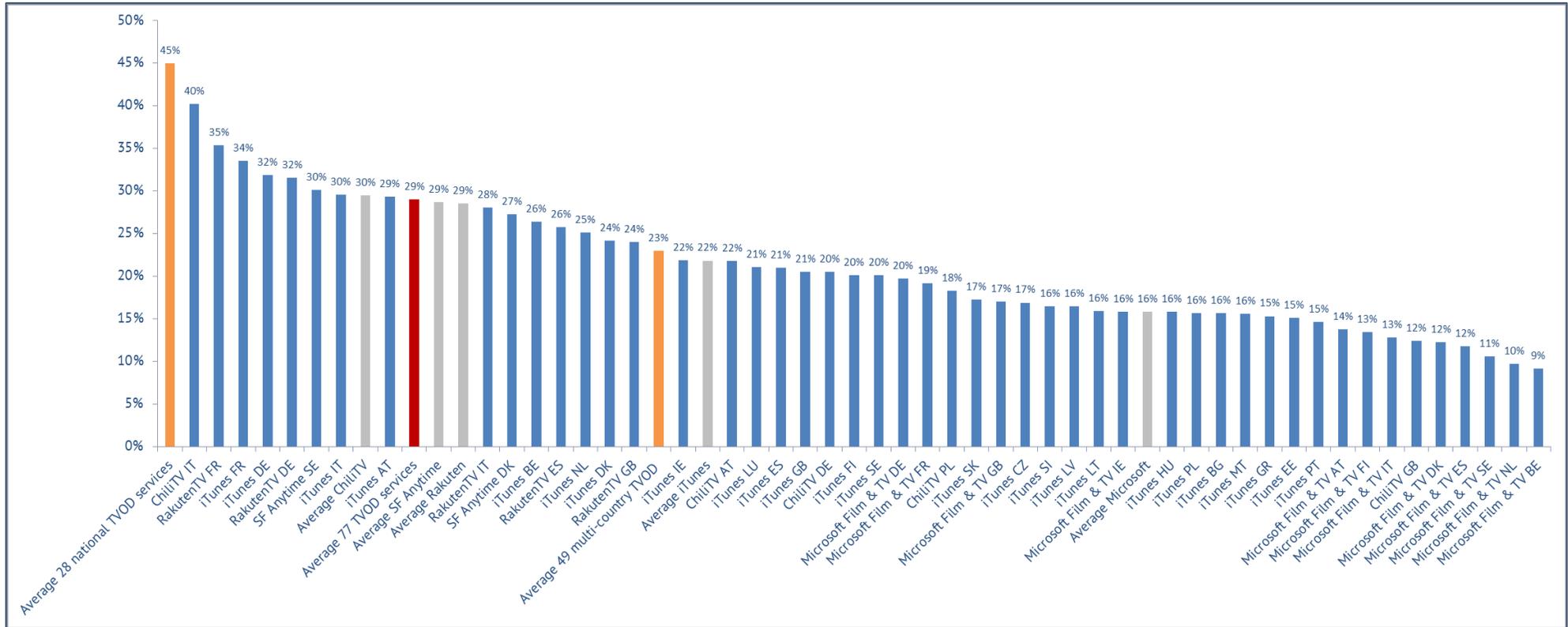
Table 17 Detail of the country catalogues of Apple's iTunes, in percentages

Name of TVOD service - Country	EU 28	EUR OBS	US	Other international	Not identified	Total	of which national
iTunes AT	29%	2%	41%	16%	11%	11 400	1%
iTunes BE	26%	2%	48%	16%	8%	10 060	1%
iTunes BG	16%	2%	53%	23%	6%	4 931	0%
iTunes CZ	17%	2%	52%	21%	8%	5 619	2%
iTunes DE	32%	2%	44%	10%	12%	10 093	11%
iTunes DK	24%	2%	50%	18%	6%	6 507	7%
iTunes EE	15%	2%	54%	23%	6%	5 257	0%
iTunes ES	21%	1%	62%	8%	8%	4 536	4%
iTunes FI	20%	2%	54%	20%	5%	6 355	2%
iTunes FR	34%	2%	44%	10%	11%	8 743	19%
iTunes GB	21%	2%	49%	20%	8%	11 485	10%
iTunes GR	15%	2%	54%	22%	6%	5 065	0%
iTunes HU	16%	2%	54%	22%	5%	4 961	0%
iTunes IE	22%	2%	51%	18%	6%	12 210	1%
iTunes IT	30%	1%	55%	8%	7%	4 843	13%
iTunes LT	16%	2%	54%	23%	5%	4 765	0%
iTunes LU	21%	2%	52%	17%	8%	9 194	0%
iTunes LV	16%	3%	52%	23%	6%	4 530	0%
iTunes MT	16%	2%	53%	24%	6%	5 985	0%
iTunes NL	25%	2%	58%	9%	6%	4 686	5%
iTunes PL	16%	2%	54%	22%	6%	5 323	0%
iTunes PT	15%	1%	54%	24%	6%	4 256	0%
iTunes SE	20%	2%	53%	19%	6%	6 940	3%
iTunes SI	16%	2%	52%	24%	5%	4 491	0%
iTunes SK	17%	2%	51%	22%	7%	4 982	0%
Total iTunes - 25 catalogues	22%	2%	51%	18%	7%	167 217	4%

Source: European Audiovisual Observatory

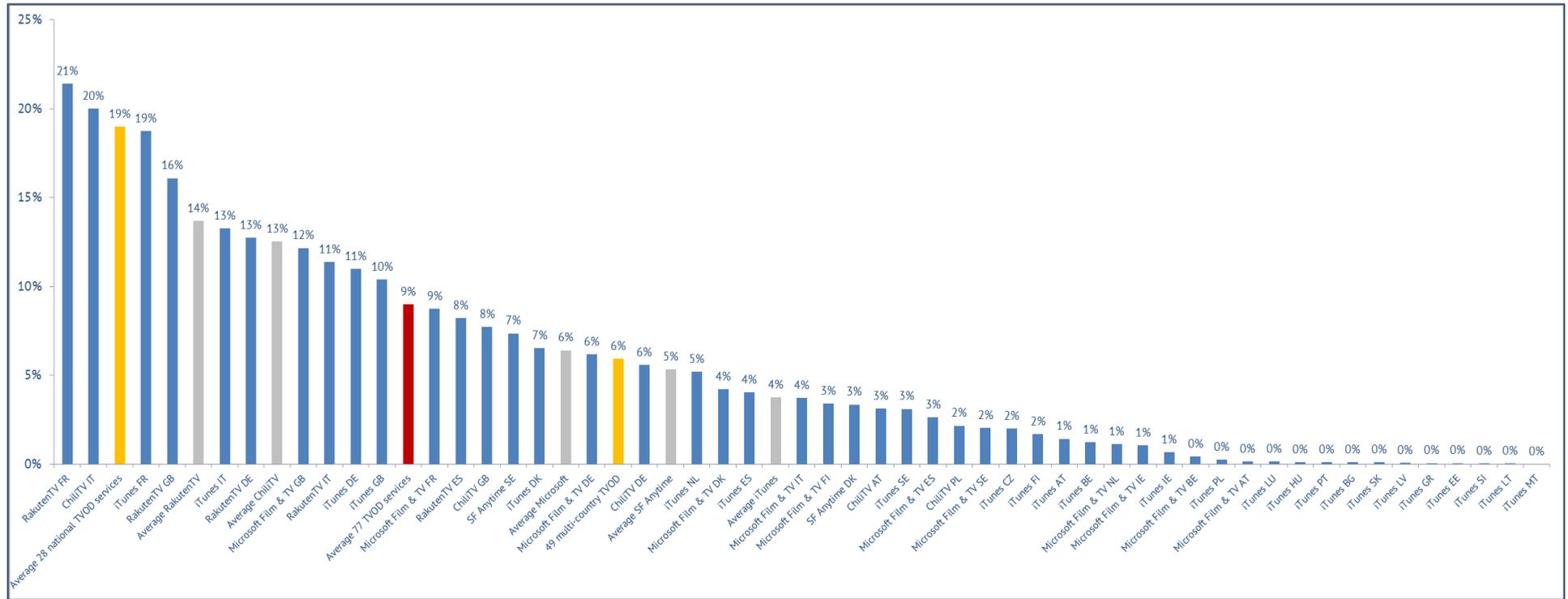
2.2.2.1. Focus on the share of EU 28 films, national and EU non-national films

Figure 32 Share of EU 28 films by multi-country service catalogues and averages, in percentages



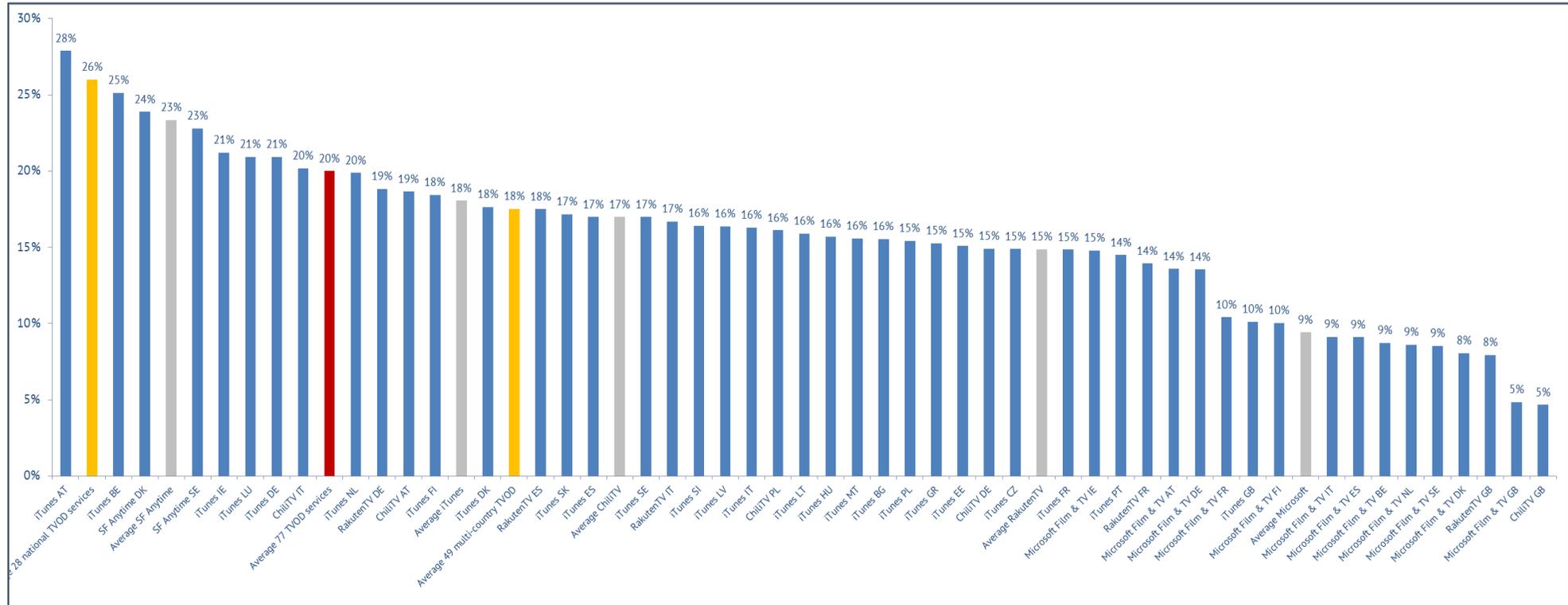
Source: European Audiovisual Observatory

Figure 33 Share of national films by multi-country service catalogues and averages, in percentages



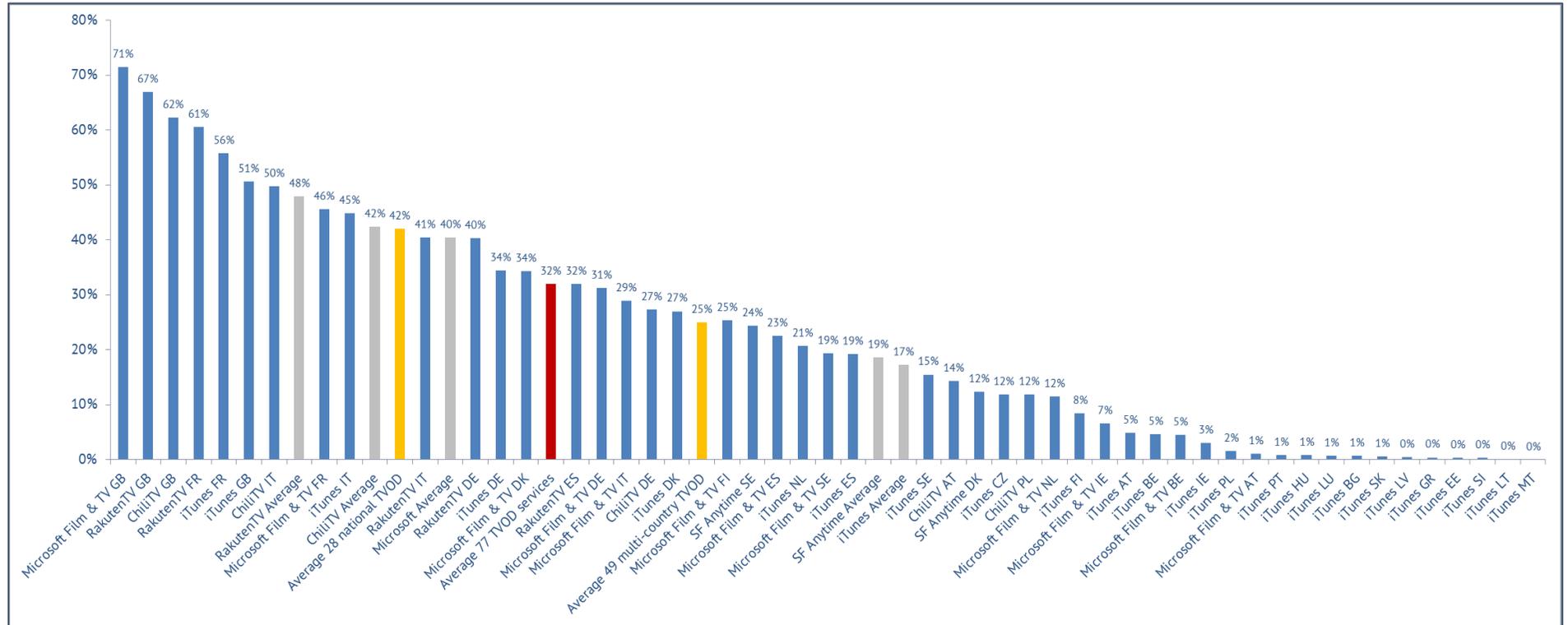
Source: European Audiovisual Observatory

Figure 34 Share of EU non-national films by multi-country service catalogues and averages, in percentages



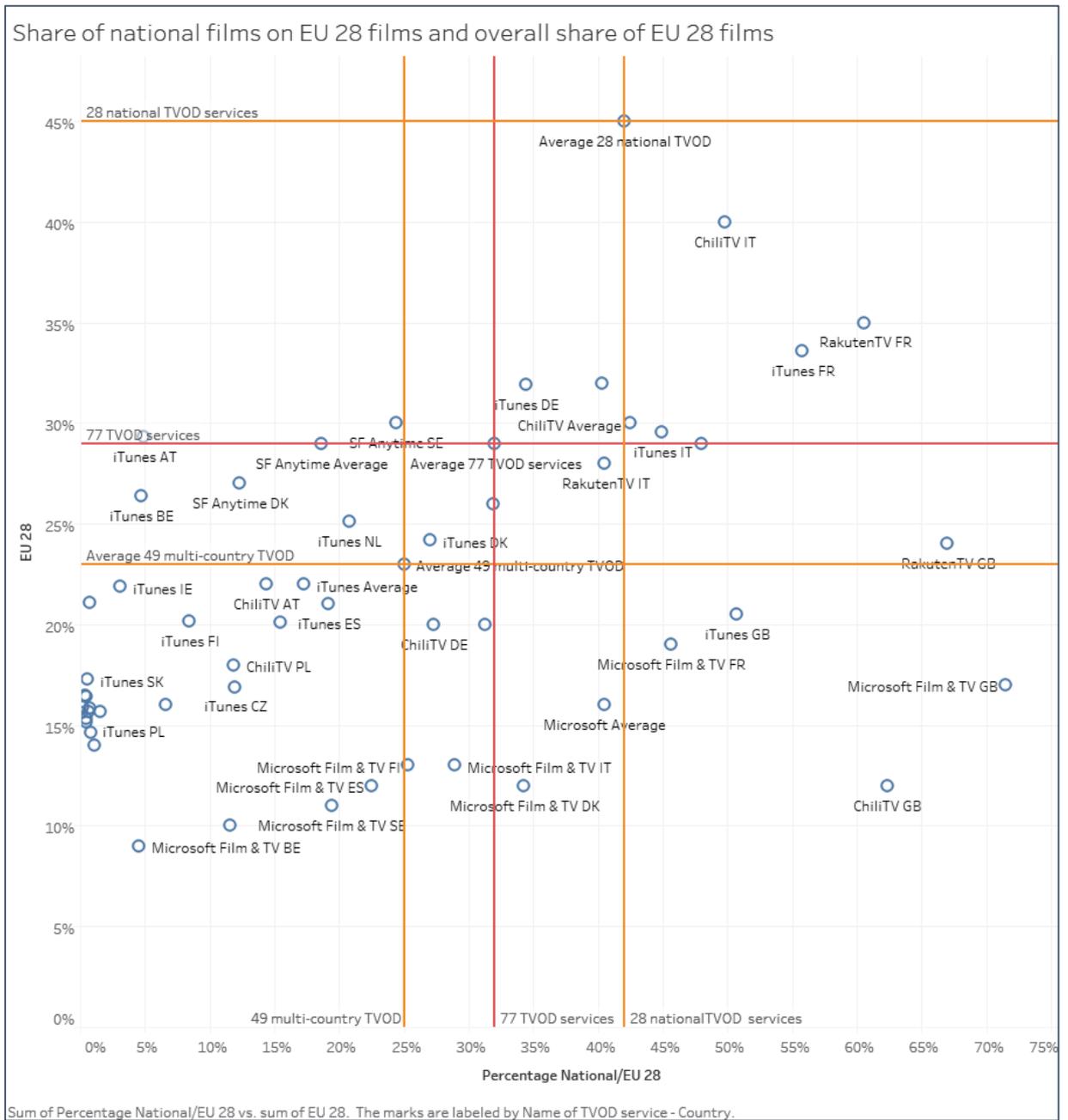
Source: European Audiovisual Observatory

Figure 35 49 multi-country TVOD catalogues - Proportion of national films in EU 28 films



Source: European Audiovisual Observatory

Matrix 3 49 multi-country catalogues - Proportion of national films in EU 28 films and share of EU 28 films



Source: European Audiovisual Observatory



2.2.3. Diversity or Concentration – the number of different production countries by services

On the most present production countries in each catalogue

18 countries of production accounted for at least 5% of films in 77 TVOD services, with US films accounting for this share in at least 75 (only exception, the specialised services Kino Fondas and Kino Club VOD). British films represented at least 5% of films in 68 catalogues, and French films in 27 catalogues. **Table 18**

The number of different production countries in function of their share in the catalogues falls drastically; for a share of at least 10% of the films, there are still 11 different production countries in 77 services, for a share of at least 20% only 5 different production countries remain in 77 catalogues (US films account for most), for a share of 30% only 4 different production countries and finally for at least 50%, only 3 different production countries. If the observation is made that 2 out of the 3 production countries are Lithuania and Austria which represent over 80% of the catalogues of Kino Fondas and Kino Club VOD respectively, the single most represented production countries is the US, followed by France, the United Kingdom, India, Germany and Italy. **Figure 36**

On the number of production countries

On average, in the 77 TVOD services, 64 distinct production countries of films are found in each catalogue. Apple's iTunes in Ireland (113 production countries), in the United Kingdom (112) and UniversCiné France (107) have the most diverse offer if only the number of production countries is considered. On the other hand, Cytavision (4 prod countries, US, FR, GB and KR), Kino Fondas (11), Kino VOD Club (14) and Microsoft Denmark (15) have the least diverse films when it comes to production countries. **Figure 37**

On average, multi-country services offer films from 69 different production countries while national services offer films on average from 55 different production countries. A great disparity between services exists.

Concentration of the top 3 countries of production

However, films, in each catalogue, of the respective top 3 production countries accounted on average for 69% of the whole film catalogue, with the highest rates found in Cytavision (99%), Kino Fondas (97%) and Microsoft DK (94%). In all, 31 services have catalogues in which the top 3 production countries accounted for more than 80% of the film offering. On the other hand, only 10 services have catalogues in which the top 3 production countries accounted for less than 70%, with Médiathèque Numérique at the lowest with 58%. **Figure 38**

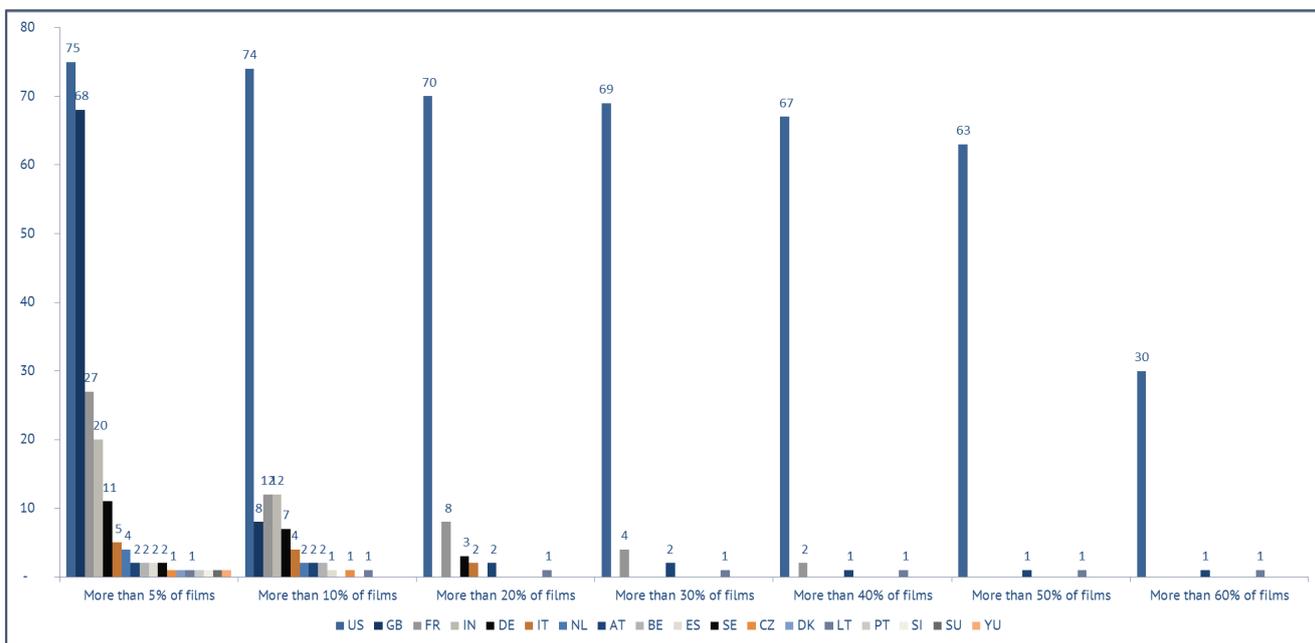


Table 18 Share of films present in catalogues by country of origin

Country of production	More than 5% of films	More than 10% of films	More than 20% of films	More than 30% of films	More than 40% of films	More than 50% of films	More than 60% of films
US	75	74	70	69	67	63	30
GB	68	8					
FR	27	12	8	4	2		
IN	20	12					
DE	11	7	3				
IT	5	4	2				
NL	4	2					
AT	2	2	2	2	1	1	1
BE	2	2					
ES	2	1					
SE	2						
CZ	1	1					
DK	1						
LT	1	1	1	1	1	1	1
PT	1						
SI	1						
SU	1						
YU	1						
Total countries of production	18	11	5	4	4	3	3
Total TVOD services out of 77	77	77	77	75	71	65	32

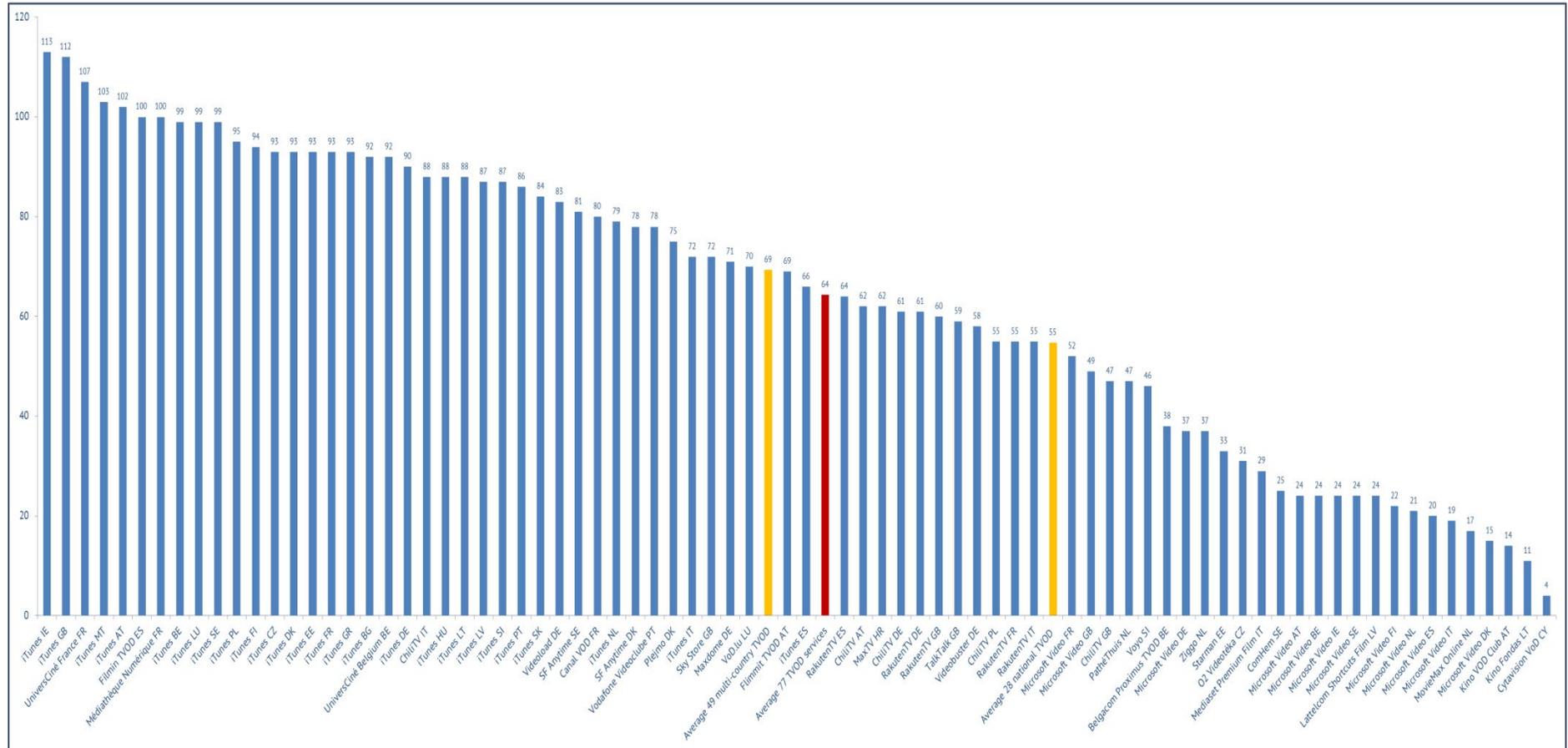
Source: European Audiovisual Observatory

Figure 36 Number of TVOD services carrying films of a specific production country in function of the share in the catalogue, in numbers of TVOD services



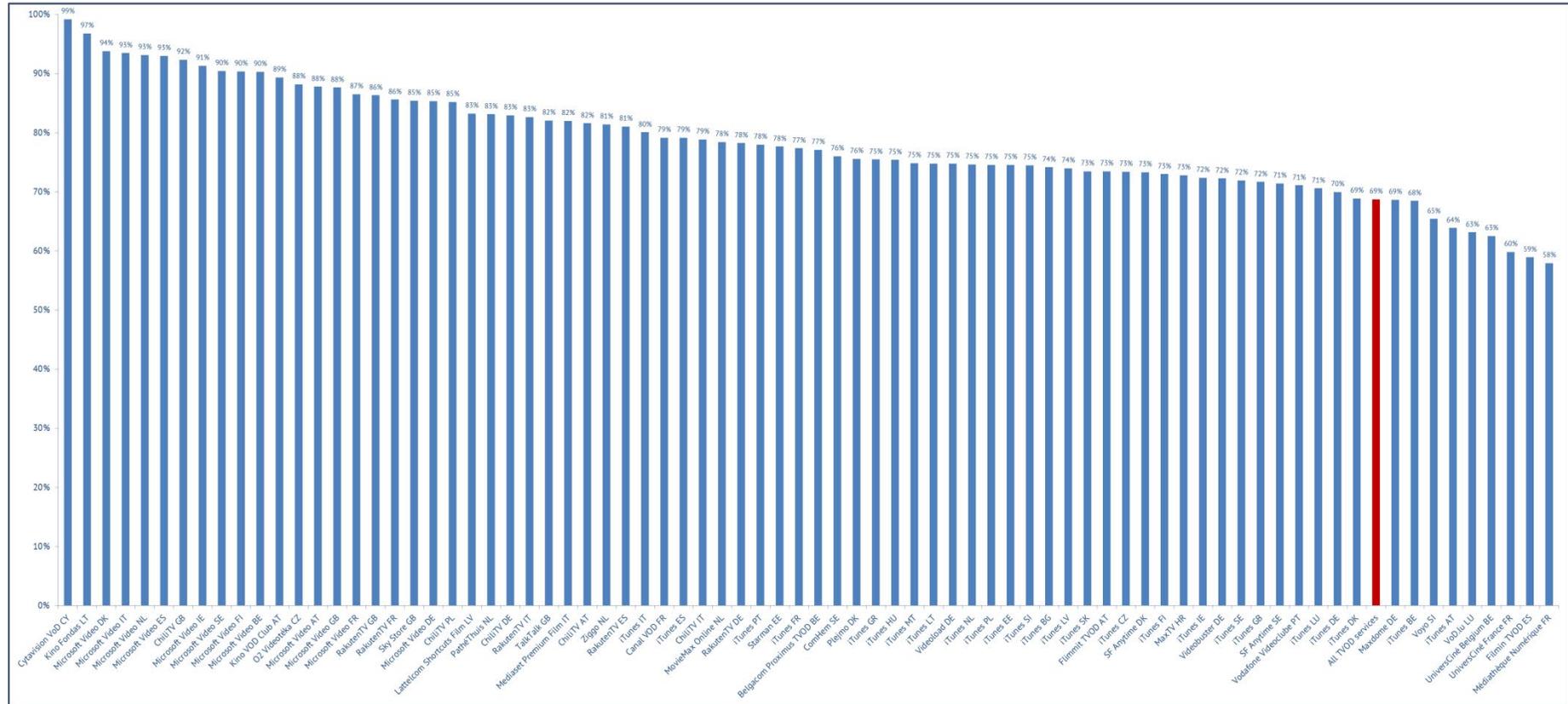
Source: European Audiovisual Observatory

Figure 37 Number of different countries of production by TVOD catalogue, in numbers



Source: European Audiovisual Observatory

Figure 38 Share of top 3 production countries by catalogue, in percentages



Source: European Audiovisual Observatory



2.3. The circulation of film titles

On this statistic

The figure of circulation for unique film titles, in countries and on services, aims to show how film titles circulate between countries and on TVOD services in order to differentiate the potential of circulation of film titles by their region of origin and to show why, even if they accounted for more than 42% of unique film titles, EU films only made 29% of all films available on TVOD services, whereas US films, accounting for 32% of all titles available, represented a share of 51% of all films available.

This figure is given for film titles by region of origin, for all EU and EUROBS film titles and in the top lists for other countries of production.

Circulation by region of origin of film titles in countries (Max 27 EU countries)- EU film titles have the lowest country circulation, with on average a given EU title being available in 2.7 countries. EUR OBS film titles circulate better, with 4.2 countries on average. US film titles on the other hand have the highest circulation with 6 countries on average, while other international titles circulate in 5 countries. The overall average for all film titles is 3.9 countries. **Table 19** and **Figure 39**

These differences become even more visible when the cumulative number of titles available in countries is taken into consideration; 90% of EU 28 titles were available in less than 5 countries while for US titles this figure was 16 countries, for other international titles 18 countries and for EUROBS titles 11 countries. **Table 20**

When the availability per title in only one country is considered, more than half of EU titles were only available in one country (57.4%), whereas this figure was 31% for US titles, 39.6% for other international titles and 43.4% for EUROBS titles. Overall, 48.3% of all film titles were only available in one country. **Table 23**

The only film titles available in all 27 countries were *Ice Age: Dawn of the Dinosaurs* (US, 2009) and *The Wolverine* (US/GB, 2013). 43 US titles were available in 26 countries, 5 EU titles and 1 other international title. **Table 22**

Circulation on TVOD services by region of origin of film titles (Max 60 services)- EU titles were available on average on 3.5 TVOD services, EUROBS on 5, US titles on 8.2 and other international titles on 5.8 TVOD services. The overall average of all film titles is a presence on 5.1 TVOD services. **Table 19** and **Figure 40**

As it was the case before, stark differences exist also when the percentile of film titles is taken into account; 90% of EU titles were available in less than 8 TVOD services, this figure was 15 services for EUROBS titles, 23 services for US titles,



18 services for other international titles. Overall, 90% of all titles were available in less than 16 services. **Table 21**

Also, almost half of EU titles were available on only one service (48.9%), while this was only the case for 29.6% of US titles, 34.8% of other international titles, 36.4% for EUROBS titles. Overall, 39.7% of all titles were only available on one TVOD service. **Table 25**

The only title available on 60 TVOD services was *Fifty Shades of Grey (US, 2015)* and the only title available on 59 services was *Kong: Skull Island (US/CN, 2017)*.

On country and service circulation by country of production

Table 26 gives the top 20 production countries in number of titles and their average country and service circulation, accounting for 90% of all film titles available. 11 EU countries are in this list, 7 other international countries, 1 EUR OBS country (Switzerland) and of course the US. On average, the film titles of these top 20 production countries circulated in 4.3 countries and 5.7 services, here however again with strong differences again.

While French titles rank second in number of titles available, they rank 13th in country circulation and 10th in service circulation. Indian titles, ranking at the 10th place in number of titles available, are the film titles which circulate the best, in countries (11.4) and on services (11.5). US films are only beaten by Indian and Hong Kongese film titles in service circulation, while they rank at the second place in country circulation, despite their higher volume of titles available.

Among EU films, British films circulate the best in countries (4.6) and on services (6.1), followed by Dutch films (3 countries on average and 3.8 services) while Swedish films complete the podium in country circulation (2.8) and French in service circulation (3.8). It is noticeable that other international titles (from IN, HK, AU, CN, CA, KR), except Japanese films, rank in the top 10 when it comes to country and service circulation.

Finally, in order to allow a better overview of EU and EUROBS film titles and their circulation, **Table 27** gives an overview for titles of these 40 countries.

Table 28 gives an overview of the top 20 country of productions with at least 50 titles available on TVOD services by country circulation. Film titles produced in Turkey, Russia, Romania, Bulgaria, Island, Ireland, Romania, Norway, the Czech Republic and Cyprus, thanks to a low volume available and a high circulation rate of several titles, often distributed on iTunes in several country catalogues, are presented in this top 20 list.

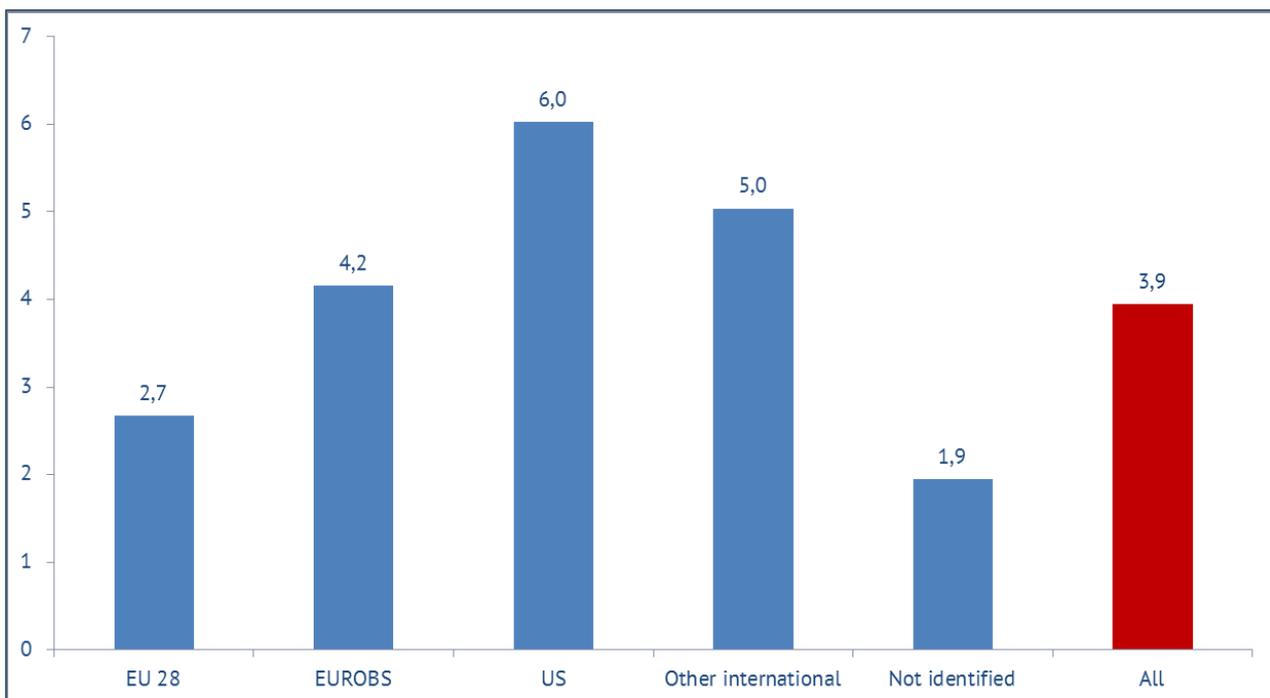


Table 19 Average country and TVOD service circulation of unique film titles by region of origin

	EU 28	EUROBS	US	Other international	Not identified	All
Film titles	26 458	1 169	20 048	7 616	8 301	63 591
Average country circulation	2,7	4,2	6,0	5,0	1,9	3,9
Average TVOD service circulation	3,5	5,0	8,2	5,8	2,0	5,1

Source: European Audiovisual Observatory

Figure 39 Average country circulation of unique film titles by region of origin



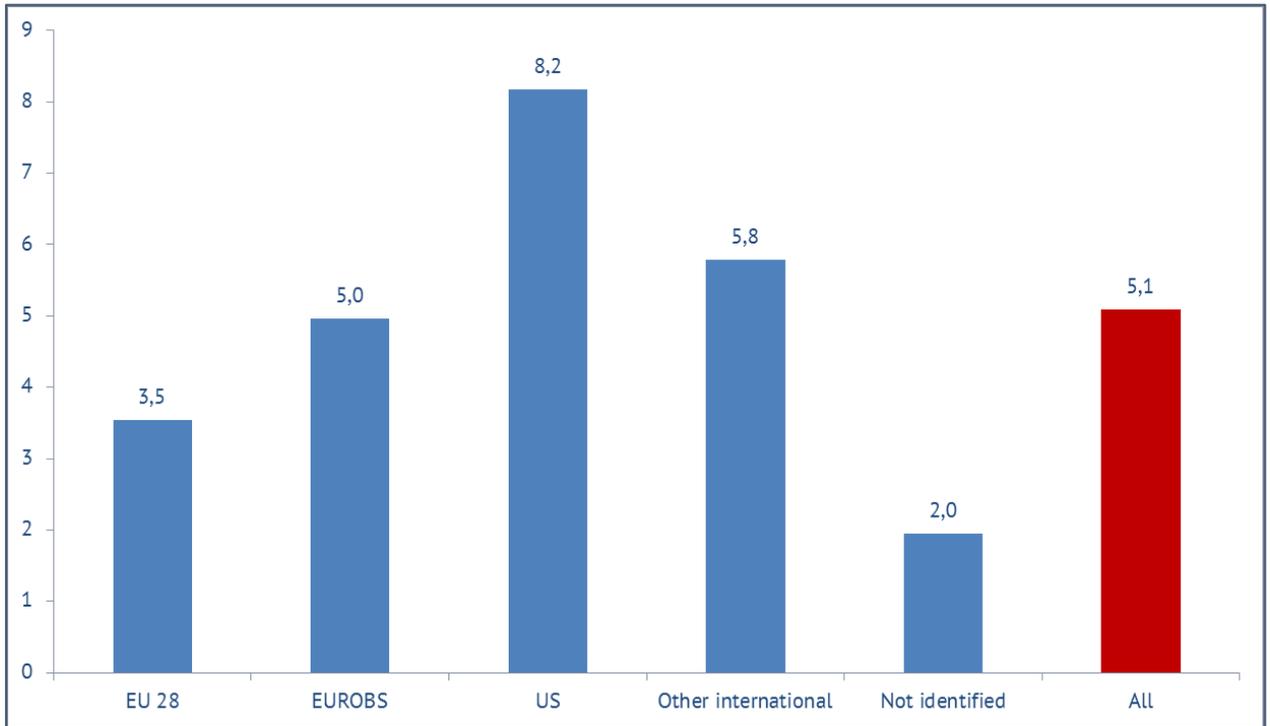
Source: European Audiovisual Observatory

Table 20 Country circulation of unique film titles per percentile by region of origin, in number of countries

	EU 28	EUR OBS	US	Other international	All film titles
90% of titles in less than	5 countries	11 countries	16 countries	18 countries	11 countries
80% of titles in less than	3 countries	6 countries	10 countries	7 countries	5 countries
60% of titles in less than	2 countries	2 countries	4 countries	2 countries	2 countries

Source: European Audiovisual Observatory

Figure 40 Average presences on TVOD services by film titles by region of origin, in number of services



Source: European Audiovisual Observatory

Table 21 Service circulation of unique film titles per percentile by region of origin, in number of countries

	EU 28	EUR OBS	US	Other international	All film titles
90% of titles in less than	8 services	15 services	23 services	18 services	16 services
80% of titles in less than	4 services	7 services	14 services	10 services	8 services
60% of titles in less than	2 services	2,5 services	5 services	3 services	3 services

Source: European Audiovisual Observatory



2.3.1. Circulation of film titles in 27 EU Member

Table 22 Countries of circulation of film titles by region of origin, in number of unique film titles

Number of countries	EU 28	EUR OBS	US	Other international	Not identified	All film titles
1	15 191	507	6 212	3 013	5 800	30 723
2	4 447	197	3 105	1 274	1 626	10 649
3	2 083	94	1 506	676	522	4 881
4	1 200	65	1 107	391	35	2 798
5	777	54	926	297	14	2 068
6	498	31	726	206	9	1 470
7	368	24	680	166	6	1 244
8	286	29	544	133	2	994
9	217	30	559	105	12	923
10	185	12	469	101	16	783
11	164	15	487	83	5	754
12	131	7	410	63	8	619
13	132	7	437	123	22	721
14	88	10	430	50	12	590
15	52	7	270	40	5	374
16	68	4	217	54	7	350
17	78	4	210	48	7	347
18	54	17	167	60	10	308
19	58	9	195	114	23	399
20	115	29	247	474	95	960
21	53	3	162	34	7	259
22	47	3	158	26	18	252
23	36	3	190	22	11	262
24	49	5	222	27	22	325
25	76	3	367	35	7	488
26	5	-	43	1	-	49
27	-	-	2	-	-	2
Total film titles	26 458	1 169	20 048	7 616	8 301	63 592

Source: European Audiovisual Observatory



Table 23 Countries of circulation of film titles by region of origin, in percentages of total titles

Number of countries	EU 28	EUR OBS	US	Other international	Not identified	All film titles
1	57,4%	43,4%	31,0%	39,6%	69,9%	48,3%
2	16,8%	16,9%	15,5%	16,7%	19,6%	16,7%
3	7,9%	8,0%	7,5%	8,9%	6,3%	7,7%
4	4,5%	5,6%	5,5%	5,1%	0,4%	4,4%
5	2,9%	4,6%	4,6%	3,9%	0,2%	3,3%
6	1,9%	2,7%	3,6%	2,7%	0,1%	2,3%
7	1,4%	2,1%	3,4%	2,2%	0,1%	2,0%
8	1,1%	2,5%	2,7%	1,7%	0,0%	1,6%
9	0,8%	2,6%	2,8%	1,4%	0,1%	1,5%
10	0,7%	1,0%	2,3%	1,3%	0,2%	1,2%
11	0,6%	1,3%	2,4%	1,1%	0,1%	1,2%
12	0,5%	0,6%	2,0%	0,8%	0,1%	1,0%
13	0,5%	0,6%	2,2%	1,6%	0,3%	1,1%
14	0,3%	0,9%	2,1%	0,7%	0,1%	0,9%
15	0,2%	0,6%	1,3%	0,5%	0,1%	0,6%
16	0,3%	0,3%	1,1%	0,7%	0,1%	0,6%
17	0,3%	0,3%	1,0%	0,6%	0,1%	0,5%
18	0,2%	1,5%	0,8%	0,8%	0,1%	0,5%
19	0,2%	0,8%	1,0%	1,5%	0,3%	0,6%
20	0,4%	2,5%	1,2%	6,2%	1,1%	1,5%
21	0,2%	0,3%	0,8%	0,4%	0,1%	0,4%
22	0,2%	0,3%	0,8%	0,3%	0,2%	0,4%
23	0,1%	0,3%	0,9%	0,3%	0,1%	0,4%
24	0,2%	0,4%	1,1%	0,4%	0,3%	0,5%
25	0,3%	0,3%	1,8%	0,5%	0,1%	0,8%
26	0,0%	0,0%	0,2%	0,0%	0,0%	0,1%
27	0,0%	0,0%	0,01%	0,0%	0,0%	0,0%
Total film titles	26 458	1 169	20 048	7 616	8 301	63 592

Source: European Audiovisual Observatory



2.3.2. Circulation of film titles on 77 TVOD services by region of origin

Table 24 Number of TVOD services per film title in function of region of origin, in number of titles

Number of TVOD services	EU 28	EUR OBS	US	Other international	Not identified	Total film titles
1	12 929	426	5 934	2 648	5 781	27 718
2	4 269	199	2 698	1 195	1 613	9 974
3	2 237	101	1 390	710	537	4 975
4	1 569	67	1 032	414	47	3 129
5	1 079	49	840	301	16	2 285
6	771	47	680	259	11	1 768
7	599	40	559	194	7	1 399
8	425	26	489	150	2	1 092
9	321	25	409	123	12	890
10	230	19	408	104	16	777
11	186	18	368	96	4	672
12	187	13	344	91	7	642
13	184	8	427	150	24	793
14	153	10	413	77	12	665
15	126	13	310	63	5	517
16	107	5	261	68	7	448
17	131	7	244	66	7	455
18	117	20	232	66	10	445
19	110	9	203	124	22	468
20	157	34	281	478	94	1 044
21	80	3	204	45	9	341
22	91	7	194	43	13	348
23	65	6	189	27	16	303
24	81	11	219	28	21	360
25	84	4	238	33	8	367
26	38	1	165	6	-	210
27	22	1	143	10	-	176
28	20	-	118	9	-	147
29	12	-	105	3	-	120
30	6	-	90	5	-	101
31	14	-	72	1	-	87
32	6	-	87	6	-	99
33	6	-	67	2	-	75
34	1	-	65	2	-	68
35	5	-	62	-	-	67
36	6	-	63	4	-	73
37	7	-	61	3	-	71
38	5	-	53	4	-	62
39	4	-	31	1	-	36
40	1	-	41	1	-	43
41	1	-	28	-	-	29
42	-	-	29	1	-	30
43	1	-	18	1	-	20
44	2	-	24	1	-	27
45	3	-	28	1	-	32
46	2	-	28	-	-	30
47	2	-	23	-	-	25
48	1	-	13	-	-	14
49	1	-	8	-	-	9
50	1	-	8	-	-	9
51	-	-	14	-	-	14
52	-	-	7	-	-	7
53	-	-	7	-	-	7
54	-	-	6	1	-	7
55	-	-	6	-	-	6
56	-	-	5	1	-	6
57	1	-	3	-	-	4
58	2	-	2	-	-	4
59	-	-	1	-	-	1
60	-	-	1	-	-	1
Total film titles	26 458	1 169	20 048	7 616	8 301	63 592

Source: European Audiovisual Observatory



Table 25 Number of TVOD services per film title in function of region of origin, in percentages of total titles

Number of TVOD services	EU 28	EUR OBS	US	Other international	Not identified	Total
1	48,9%	36,4%	29,6%	34,8%	69,6%	43,6%
2	16,1%	17,0%	13,5%	15,7%	19,4%	15,7%
3	8,5%	8,6%	6,9%	9,3%	6,5%	7,8%
4	5,9%	5,7%	5,1%	5,4%	0,6%	4,9%
5	4,1%	4,2%	4,2%	4,0%	0,2%	3,6%
6	2,9%	4,0%	3,4%	3,4%	0,1%	2,8%
7	2,3%	3,4%	2,8%	2,5%	0,1%	2,2%
8	1,6%	2,2%	2,4%	2,0%	0,0%	1,7%
9	1,2%	2,1%	2,0%	1,6%	0,1%	1,4%
10	0,9%	1,6%	2,0%	1,4%	0,2%	1,2%
11	0,7%	1,5%	1,8%	1,3%	0,0%	1,1%
12	0,7%	1,1%	1,7%	1,2%	0,1%	1,0%
13	0,7%	0,7%	2,1%	2,0%	0,3%	1,2%
14	0,6%	0,9%	2,1%	1,0%	0,1%	1,0%
15	0,5%	1,1%	1,5%	0,8%	0,1%	0,8%
16	0,4%	0,4%	1,3%	0,9%	0,1%	0,7%
17	0,5%	0,6%	1,2%	0,9%	0,1%	0,7%
18	0,4%	1,7%	1,2%	0,9%	0,1%	0,7%
19	0,4%	0,8%	1,0%	1,6%	0,3%	0,7%
20	0,6%	2,9%	1,4%	6,3%	1,1%	1,6%
21	0,3%	0,3%	1,0%	0,6%	0,1%	0,5%
22	0,3%	0,6%	1,0%	0,6%	0,2%	0,5%
23	0,2%	0,5%	0,9%	0,4%	0,2%	0,5%
24	0,3%	0,9%	1,1%	0,4%	0,3%	0,6%
25	0,3%	0,3%	1,2%	0,4%	0,1%	0,6%
26	0,1%	0,1%	0,8%	0,1%	0,0%	0,3%
27	0,1%	0,1%	0,7%	0,1%	0,0%	0,3%
28	0,1%	0,0%	0,6%	0,1%	0,0%	0,2%
29	0,0%	0,0%	0,5%	0,0%	0,0%	0,2%
30	0,0%	0,0%	0,4%	0,1%	0,0%	0,2%
31	0,1%	0,0%	0,4%	0,0%	0,0%	0,1%
32	0,0%	0,0%	0,4%	0,1%	0,0%	0,2%
33	0,0%	0,0%	0,3%	0,0%	0,0%	0,1%
34	0,0%	0,0%	0,3%	0,0%	0,0%	0,1%
35	0,0%	0,0%	0,3%	0,0%	0,0%	0,1%
36	0,0%	0,0%	0,3%	0,1%	0,0%	0,1%
37	0,0%	0,0%	0,3%	0,0%	0,0%	0,1%
38	0,0%	0,0%	0,3%	0,1%	0,0%	0,1%
39	0,0%	0,0%	0,2%	0,0%	0,0%	0,1%
40	0,0%	0,0%	0,2%	0,0%	0,0%	0,1%
41	0,0%	0,0%	0,1%	0,0%	0,0%	0,0%
42	0,0%	0,0%	0,1%	0,0%	0,0%	0,0%
43	0,0%	0,0%	0,1%	0,0%	0,0%	0,0%
44	0,0%	0,0%	0,1%	0,0%	0,0%	0,0%
45	0,0%	0,0%	0,1%	0,0%	0,0%	0,1%
46	0,0%	0,0%	0,1%	0,0%	0,0%	0,0%
47	0,0%	0,0%	0,1%	0,0%	0,0%	0,0%
48	0,0%	0,0%	0,1%	0,0%	0,0%	0,0%
49	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%
50	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%
51	0,0%	0,0%	0,1%	0,0%	0,0%	0,0%
52	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%
53	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%
54	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%
55	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%
56	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%
57	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%
58	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%
59	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%
60	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%
Total film titles	26 458	1 169	20 048	7 616	8 301	63 592

Source: European Audiovisual Observatory

2.3.3. Circulation of film titles by country of production

Table 26 Top 20 countries of production by number of titles in 77 TVOD services and average country and service circulation

Rank	Country of production	Film titles	Average country circulation	Average TVOD service circulation	% of total film titles	Region
1	US	20 048	6,03	8,2	36%	US
2	FR	6 186	2,63	3,8	11%	EU
3	GB	3 895	4,64	6,1	7%	EU
4	IT	3 812	1,84	2,3	7%	EU
5	DE	3 367	2,27	3,3	6%	EU
6	ES	2 282	2,01	2,4	4%	EU
7	CA	1 575	4,46	5,5	3%	INT
8	AT	1 403	1,63	2,1	3%	EU
9	BE	1 137	2,09	2,5	2%	EU
10	IN	990	11,36	11,5	2%	INT
11	JP	895	2,64	3,3	2%	INT
12	SE	823	2,83	3,7	1%	EU
13	DK	723	2,55	3,4	1%	EU
14	AU	569	4,77	6,2	1%	INT
15	NL	560	3,06	3,8	1%	EU
16	HK	408	6,92	7,5	1%	INT
17	LT	398	1,11	1,1	1%	EU
18	CH	325	2,92	3,4	1%	EUROBS
19	KR	305	3,27	4,2	1%	INT
20	CN	284	4,63	6,1	1%	INT
Total 20		49 985	4,3	5,7	90%	

Source: European Audiovisual Observatory



Table 27 Ranking EU 28 and EUROBS countries by number of titles in 77 TVOD services and average country and service circulation

Overall rank	Country of production	Film titles	Average country circulation	Average TVOD service circulation	% of total European film titles	Region
2	FR	6 186	2,6	3,8	11%	EU
3	GB	3 895	4,6	6,1	7%	EU
4	IT	3 812	1,8	2,3	7%	EU
5	DE	3 367	2,3	3,3	6%	EU
6	ES	2 282	2,0	2,4	4%	EU
8	AT	1 403	1,6	2,1	3%	EU
9	BE	1 137	2,1	2,5	2%	EU
12	SE	823	2,8	3,7	1%	EU
13	DK	723	2,5	3,4	1%	EU
15	NL	560	3,1	3,8	1%	EU
17	LT	398	1,1	1,1	1%	EU
18	CH	325	2,9	3,4	1%	EUROBS
21	RU	281	3,6	4,5	1%	EUROBS
23	CZ	274	3,9	4,3	0,5%	EU
24	NO	268	4,2	5,4	0,5%	EUROBS
25	PT	256	1,6	1,8	0,5%	EU
26	FI	252	3,4	4,1	0,5%	EU
29	IE	211	4,7	6,1	0,4%	EU
30	PL	183	3,5	4,1	0,3%	EU
31	TR	178	7,4	7,8	0,3%	EUROBS
32	HU	170	2,7	3,2	0,3%	EU
37	LU	109	2,3	2,5	0,2%	EU
39	RO	102	4,1	5,0	0,2%	EU
45	GR	58	2,8	3,3	0,1%	EU
46	IS	58	4,7	6,2	0,1%	EUROBS
48	BG	51	4,5	5,7	0,1%	EU
49	SI	50	2,4	2,7	0,1%	EU
51	EE	48	3,0	3,5	0,1%	EU
52	HR	40	3,1	3,6	0,1%	EU
55	SK	33	3,2	3,8	0,1%	EU
58	LV	29	3,7	3,9	0,1%	EU
68	BA	19	3,2	4,0	0,03%	EUROBS
69	GE	19	2,4	3,1	0,03%	EUROBS
70	MA	19	2,7	3,2	0,03%	EUROBS
82	MK	8	1,5	2,1	0,01%	EUROBS
84	AL	7	4,0	4,6	0,01%	EUROBS
92	AM	5	5,4	5,6	0,01%	EUROBS
95	CY	4	5,5	6,8	0,01%	EU
112	MT	2	3,5	4,5	0,004%	EU
139	LI	1	1,0	1,0	0,002%	EUROBS
40 OBS	Total EU and EUROBS	27 646	2,7	3,6	100%	

Source: European Audiovisual Observatory



Table 28 Top 20 countries of production by average country circulation (at least 50 film titles)

Overall rank	Country of production	Film titles	Average country circulation	Average TVOD service circulation	% of total film titles	Region
10	IN	990	11,36	11,5	1,8%	INT
31	TR	178	7,37	7,8	0,3%	EUROBS
40	PH	96	7,70	7,9	0,2%	INT
36	TH	124	7,11	7,8	0,2%	INT
16	HK	408	6,92	7,5	0,7%	INT
1	US	20 048	6,03	8,2	36,3%	US
38	NZ	108	5,31	6,6	0,2%	INT
14	AU	569	4,77	6,2	1,0%	INT
46	IS	58	4,74	6,2	0,1%	EUROBS
29	IE	211	4,73	6,1	0,4%	EU
3	GB	3 895	4,64	6,1	7,0%	EU
20	CN	284	4,63	6,1	0,5%	INT
41	ZA	95	4,82	5,9	0,2%	INT
48	BG	51	4,55	5,7	0,1%	EU
7	CA	1 575	4,46	5,5	2,8%	INT
28	BR	213	4,44	4,9	0,4%	INT
24	NO	268	4,22	5,4	0,5%	EUROBS
39	RO	102	4,06	5,0	0,2%	EU
23	CZ	274	3,92	4,3	0,5%	EU
21	RU	281	3,61	4,5	0,5%	EUROBS
	Total 20	29 828	5,8	7,6	54%	

Source: European Audiovisual Observatory



2.4. Share of recent and catalogue films and film titles

Distinction between catalogue and recent films

Catalogue films are defined as films produced in 2007 and before as the catalogue data gathering has taken place in 2017 and early 2018. Recent films are therefore films produced in 2008 and after. Unidentified films have been excluded from the analysis, even if their year of production was available

On the share of recent and catalogue films in the 77 TVOD catalogues

Overall, 58.3% of all films available were recent films. The highest share of recent films were for EUR OBS films with 84% (but they represented also the lowest number of available films), followed by other international films (70% of recent films), EU 28 films (62%), of which national films (57%) and US films, which tended to be the less recent with 52.5% of films being produced in or after 2008. **Table 29** and **Figure 41**

The average production year for all films was 2003, this was also the case for the average production year for EU films. US films were on average produced in 2001, national films in 2002, other international films in 2006 and EUR OBS films in 2011. **Table 30**

Half of all EU films were produced in or after 2011, for national films this was the case in year 2010 while 50% of all US films were produced in or after 2009, 2012 for other international films and half of EUROBS films were produced in or after 2013. **Table 30**

On the share of recent and catalogue unique film titles in the 77 TVOD catalogues

When it comes to unique film titles, the splits are even; 50% of titles were catalogue titles, 50% recent titles. EU titles were also evenly split between recent and catalogue titles, whereas US titles are more catalogue titles with 54% being produced in or after 2007. Other international titles were mostly recent with 59%, the same applies to EUR OBS titles with 74% of all titles being recently produced. **Table 31**

The average year of production for all titles was 1999. EU film titles were produced on average in 1999, US titles in 1996, other international titles in 2003 and EUR OBS titles in 2009. **Table 32**

80% of all EU titles were produced in or after 1982, for US titles the year was 1979, for other international titles 1993 and for EUR OBS titles 2006. For all films, 80% were produced in or after 1983. **Table 32**

US titles tend to be more catalogue titles than titles of other origins. This could mean that “old” US” blockbusters still find an audience in TVOD catalogues. EU film titles even split between recent and catalogue films shows also that some services of the sample are more specialised in art house films and still carry older EU film titles in their catalogues.



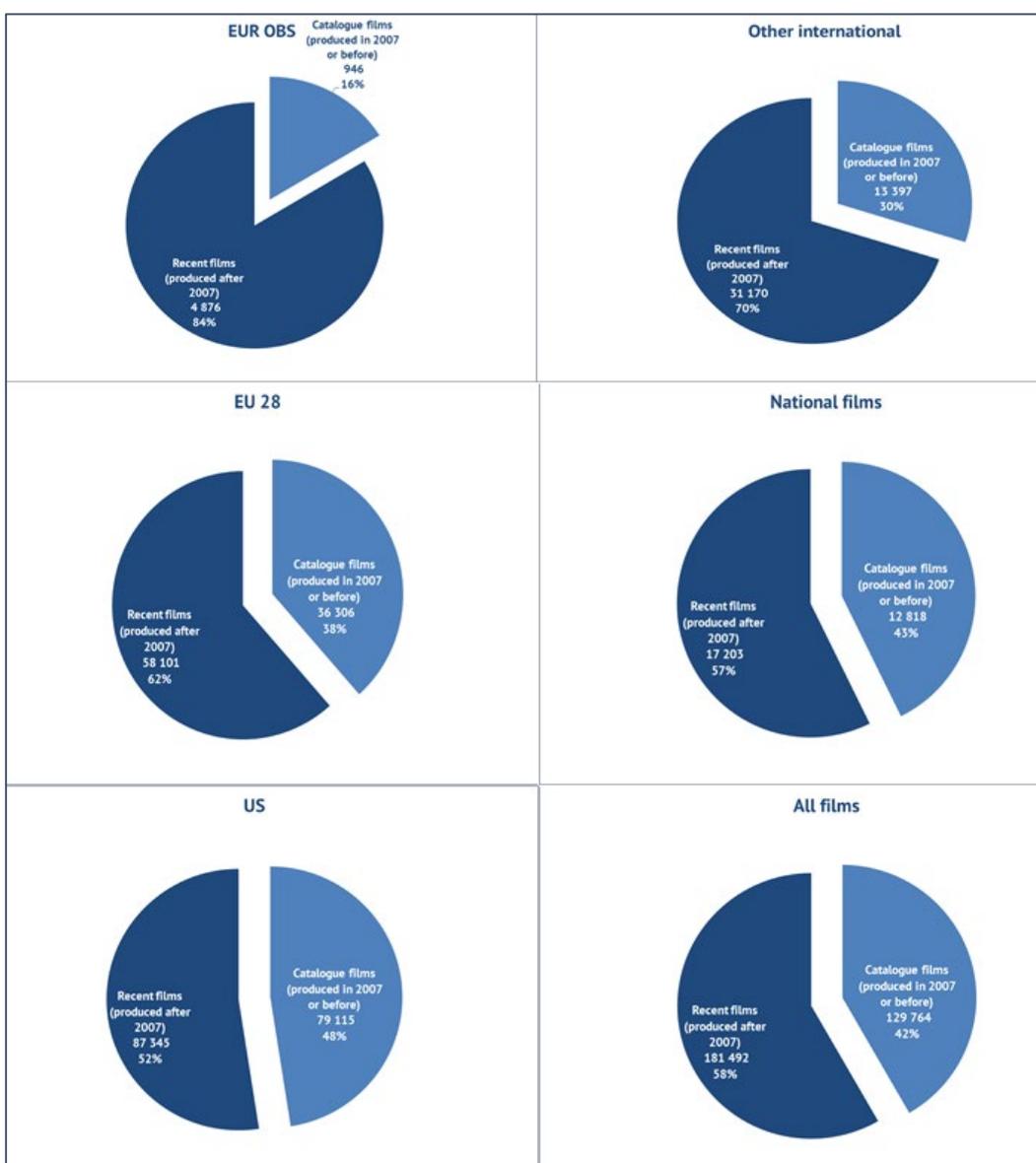
2.4.1. Films and film titles on 77 TVOD services

Table 29 Number and share of recent and catalogue films by region of origin in TVOD catalogues

	EU 28	of which National	EUR OBS	US	Other international	All films
Catalogue films (produced in 2007 or before)	36 306	12 818	946	79 115	13 397	129 764
Recent films (produced after 2007)	58 101	17 203	4 876	87 345	31 170	181 492
Total	94 407	30 021	5 822	166 460	44 567	311 256
Catalogue films (produced in 2007 or before)	38%	43%	16%	47,5%	30,1%	41,7%
Recent films (produced after 2007)	62%	57%	84%	52,5%	69,9%	58,3%

Source: European Audiovisual Observatory

Figure 41 Overview – Shares of recent and catalogues films in TVOD catalogues



Source: European Audiovisual Observatory



Table 30 Average year of production for films by region of origin in TVOD catalogues

	EU 28	National	EUR OBS	US	Other international	Average all titles
Average year of production	2003	2002	2011	2001	2006	2003
50% of films produced in and after	2011	2010	2013	2009	2012	2010
80% of films produced in and after	1995	1991	2009	1992	2002	1994
90% of films produced in and after	1973	1972	2006	1978	1983	1977

Source: European Audiovisual Observatory

Table 31 Number and share of recent and catalogue film titles by region of origin in TVOD catalogues

	EU 28	EUR OBS	US	Other international	All film titles
Catalogue film titles (produced in 2007 or before)	13 130	302	10 806	3 122	27 360
Recent film titles (produced after 2007)	13 212	863	9 134	4 455	27 664
Total	26 342	1 165	19 940	7 577	55 024
Catalogue film titles (produced in 2007 or before)	50%	26%	54%	41%	50%
Recent film titles (produced after 2007)	50%	74%	46%	59%	50%

Source: European Audiovisual Observatory

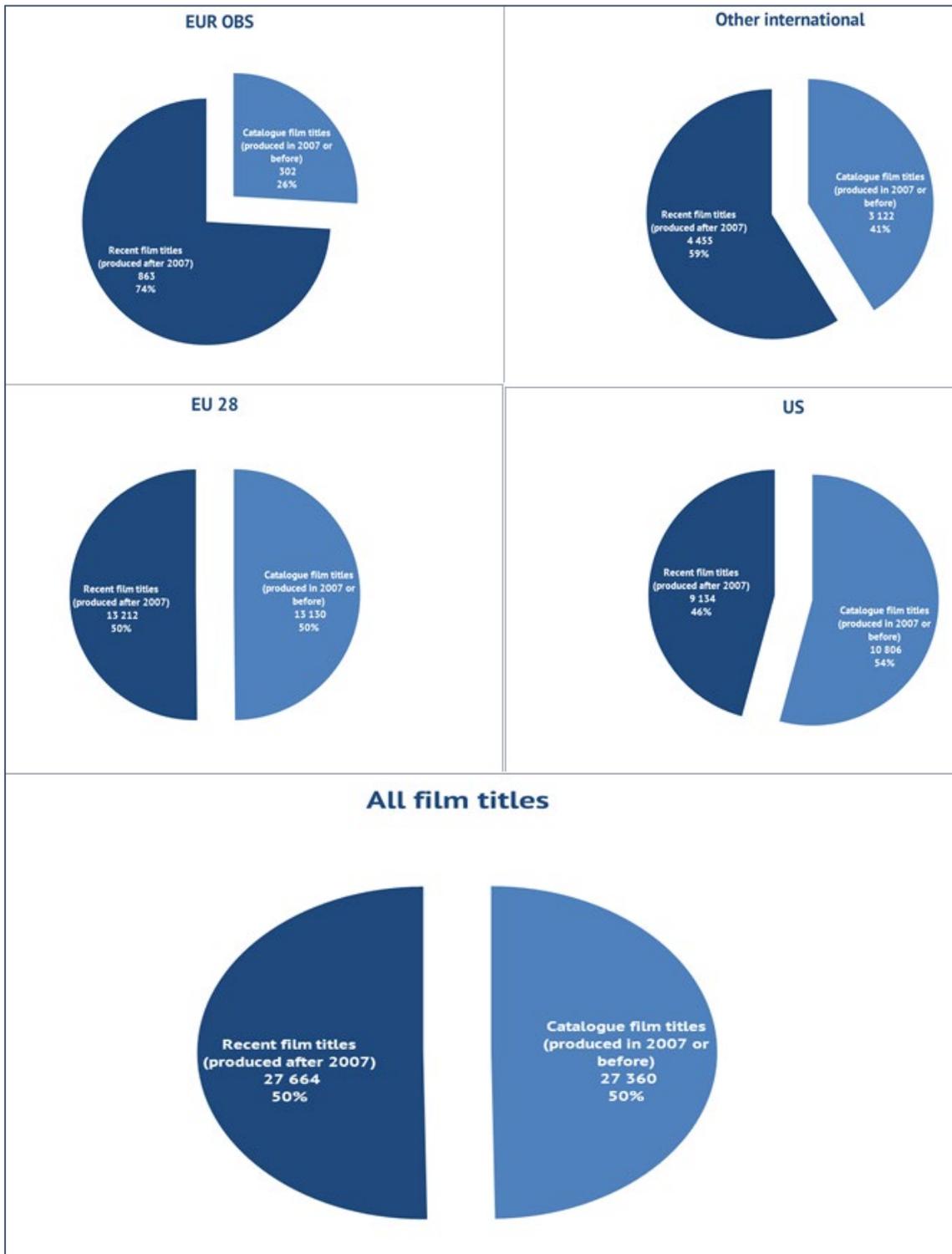
Table 32 Average year of production for film titles by region of origin in TVOD catalogues

	EU 28	EUR OBS	US	Other international	Average all titles
Average year of production	1999	2009	1996	2003	1999
50% of film titles produced in and after	2008	2012	2006	2010	2008
80% of film titles produced in and after	1982	2006	1979	1993	1983
90% of film titles produced in and after	1967	2000	1955	1977	1965

Source: European Audiovisual Observatory



Figure 42 Overview – Shares of recent and catalogues film titles in TVOD catalogues



Source: European Audiovisual Observatory

2.4.2. Share of recent films in 77 TVOD services by origin

On the share of recent films in individual TVOD catalogues

National TVOD services

On average, the film offerings of the 28 national services were recent films with 61% of the films being produced in or after 2008, with recent EU films accounting for 60% of EU films (of which 57% of all national films in the catalogues). The services carrying the most recent films were Starman in Estonia with 89% of recent films, Belgacom Proximus with 84%, the Dutch service MovieMax Online with 83% and MaxTV in Croatia with 81%. On the other hand, the Lithuanian service Kino Fondas had only a share of 29% of recent films, the Italian service Mediaset Premium 41% and the Spanish Filmin 48%, as did UniversCiné France. **Table 33**

The same services are also offering the most and least recent films when it comes to EU titles, with Mediaset Premium offering mostly catalogue Italian films for which the share of recent national films was at 16%. Filmin in Spain seems to offer mostly catalogue US films, classics, with only a share of 24% of recent US films (or 76% catalogue US films). **Table 33** and **Figure 43**

Multi-country TVOD services

Recent films represented 57% of all films in the catalogues of M-C services, with ChiliTV having only 44% of recent films in its catalogues (due to mostly to its Italian catalogue which has a share of 32% of recent films, the lowest of all M-C catalogues), iTunes having 57% of recent films in its country catalogues on average, Microsoft 64%, Rakuten TV 65% and SF Anytime 72%. **Table 34**

For EU films, the most recent titles can be found in the catalogues of Rakuten TV in the UK (84%), Germany (76%), Italy (75%) and France (71%) while Microsoft has 75% recent EU films in its catalogues in Finland, 72% in Spain and 70% in France and Italy. Apple's iTunes has the highest share of recent EU films in the catalogues in the Netherlands (78%), Spain (71%), Finland (70%), the Czech Republic (69%) and Poland (69%). **Figure 43**

US films in iTunes catalogues are the most recent in the British catalogue (57%) and the lowest in France, Hungary and Spain (43%). The most recent US films of all M-C services are found in the catalogues of Microsoft FI (74%), NL (73%), AT (72%) and in the Swedish catalogue of SF Anytime (72%). **Table 34** and **Table 35**

Finally **Figure 43** and **Figure 44** give the overview of recent EU and all films by service. Only 6 services offer less than 50% of recent films and rely more on catalogue films. These services are Kino Fondas, ChiliTV IT, Mediaset Premium, Filmin, UniversCiné France and Chili TV GB. Most of TVOD services rely on recent films to attract their customers and national services are offering are bit more recent films than M-C services (with 61% versus 57%).



Table 33 28 national TVOD services - Share of recent films in percentages by region of origin

	EU 28	of which national	EUR OBS	US	Other international	All films identified
Belgacom Proximus TVOD BE	89%	94%	93%	77%	94%	84%
Canal VOD FR	54%	50%	90%	51%	70%	54%
ComHem SE	68%	75%	67%	66%	82%	68%
Cytavision VoD CY	63%			70%	100%	70%
Filmin TVOD ES	54%	76%	84%	24%	62%	48%
Flimmit TVOD AT	58%	60%	74%	54%	60%	58%
Kino Fondas LT	29%	28%	50%			29%
Kino VOD Club AT	61%	59%	100%	100%	100%	62%
Lattelcom Shortcuts Film LV	84%	79%	94%	77%	28%	74%
Maxdome DE	49%	47%	69%	57%	51%	53%
MaxTV HR	83%	100%	92%	79%	82%	81%
Mediaset Premium Film IT	29%	16%	56%	47%	57%	41%
Médiathèque Numérique FR	53%	51%	67%	56%	65%	56%
MovieMax Online NL	91%	100%	100%	74%	100%	83%
O2 Videotéka CZ	61%	47%	100%	57%	89%	60%
PathéThuis NL	85%	87%	100%	73%	90%	78%
Plejmo DK	77%	89%	94%	71%	84%	74%
Sky Store GB	77%	76%	88%	56%	81%	63%
Starman EE	91%	84%	100%	87%	94%	89%
TalkTalk GB	72%	70%	85%	60%	76%	65%
UniversCiné Belgium BE	59%	48%	77%	60%	59%	59%
UniversCiné France FR	46%	46%	61%	40%	59%	48%
Videobuster DE	66%	69%	93%	51%	53%	60%
Videoload DE	76%	77%	89%	63%	84%	70%
VoD.lu LU	70%	52%	78%	61%	60%	67%
Vodafone Videoclube PT	71%	39%	84%	69%	76%	71%
Voyo SI	61%	50%	91%	62%	38%	58%
Ziggo NL	84%	94%	93%	67%	87%	73%
Average 28 national services	60%	57%	80%	59%	68%	61%
All 77 TVOD services	62%	57%	84%	52%	70%	58%

Source: European Audiovisual Observatory



Table 34 Multi-country services – Share of recent films by region of origin, in percentages

	EU 28	of which national	EUR OBS	US	Other international	All films identified
ChiliTV AT	62%	43%	91%	52%	76%	56%
ChiliTV DE	63%	76%	90%	52%	76%	56%
ChiliTV GB	64%	59%	83%	46%	74%	50%
ChiliTV IT	31%	27%	62%	32%	43%	32%
ChiliTV PL	68%	100%	84%	56%	81%	60%
Microsoft Film & TV AT	74%	100%	83%	72%	87%	74%
Microsoft Film & TV BE	55%	100%	100%	61%	59%	60%
Microsoft Film & TV DE	68%	80%	100%	66%	72%	67%
Microsoft Film & TV DK	66%	83%	100%	68%	87%	68%
Microsoft Film & TV ES	72%	88%	50%	70%	78%	71%
Microsoft Film & TV FI	75%	100%	100%	74%	77%	74%
Microsoft Film & TV FR	70%	74%	74%	55%	69%	59%
Microsoft Film & TV GB	67%	66%	85%	59%	73%	62%
Microsoft Film & TV IE	66%	57%	100%	61%	79%	63%
Microsoft Film & TV IT	70%	83%	67%	69%	67%	69%
Microsoft Film & TV NL	58%	100%	100%	73%	86%	72%
Microsoft Film & TV SE	60%	77%	100%	67%	83%	68%
RakutenTV DE	76%	78%	90%	67%	85%	72%
RakutenTV ES	60%	53%	83%	48%	70%	53%
RakutenTV FR	71%	73%	90%	57%	77%	63%
RakutenTV GB	84%	83%	100%	66%	89%	72%
RakutenTV IT	75%	73%	97%	57%	82%	64%
SF Anytime DK	70%	64%	88%	72%	78%	72%
SF Anytime SE	67%	54%	84%	72%	79%	71%
Average ChiliTV	41%	34%	73%	43%	56%	44%
Average Microsoft	68%	73%	83%	63%	73%	64%
Average RakutenTV	73%	74%	91%	59%	81%	65%
Average SF Anytime	69%	58%	86%	72%	79%	72%
Average iTunes	65%	61%	86%	48%	70%	57%
Average 49 multi-country TVOD	62%	57%	85%	51%	70%	57%
All 77 TVOD services	62%	57%	84%	52%	70%	58%

Source: European Audiovisual Observatory

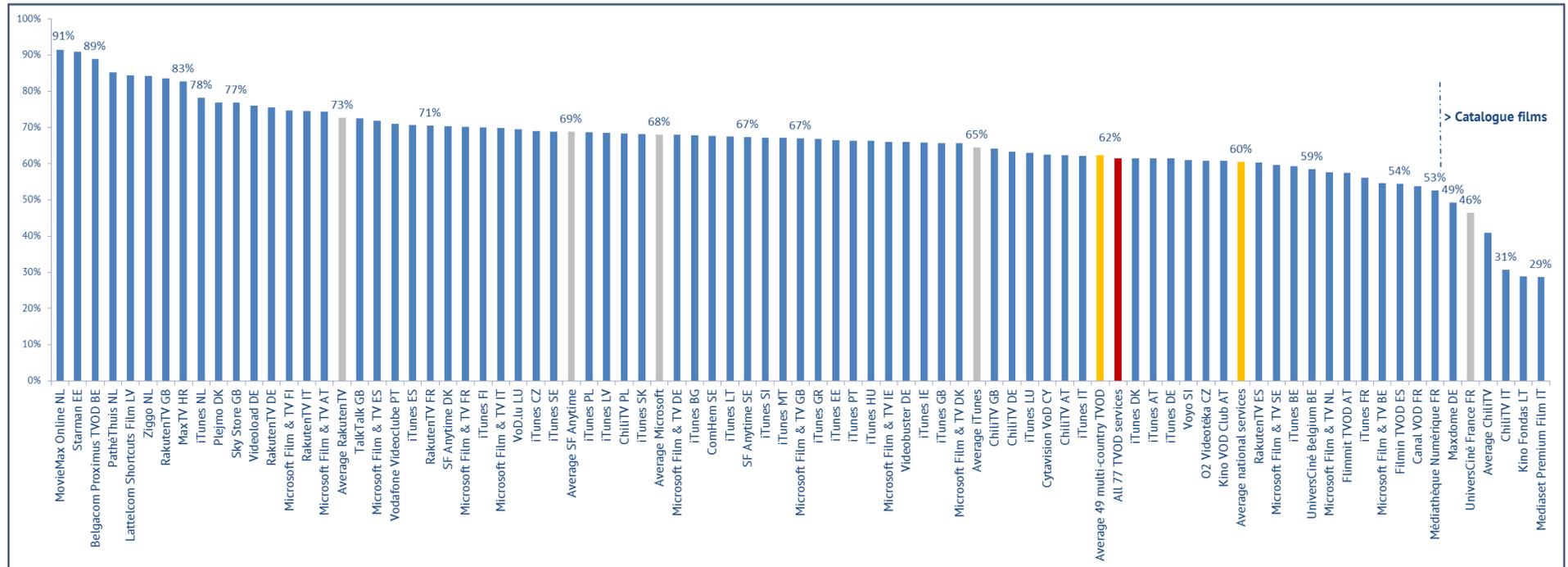


Table 35 Apple's iTunes catalogues - Share of recent films by region of origin, in percentages

	EU 28	of which national	EUR OBS	US	Other international	All films identified
iTunes AT	61%	57%	84%	50%	69%	58%
iTunes BE	59%	81%	87%	48%	69%	56%
iTunes BG	68%	80%	86%	48%	72%	58%
iTunes CZ	69%	72%	87%	49%	71%	59%
iTunes DE	61%	66%	83%	48%	68%	56%
iTunes DK	62%	42%	87%	47%	75%	57%
iTunes EE	66%	100%	87%	46%	71%	56%
iTunes ES	71%	77%	85%	43%	76%	53%
iTunes FI	70%	92%	84%	50%	73%	59%
iTunes FR	56%	52%	86%	43%	67%	51%
iTunes GB	66%	63%	84%	57%	68%	62%
iTunes GR	67%	100%	84%	47%	74%	58%
iTunes HU	66%	67%	89%	43%	71%	55%
iTunes IE	66%	76%	83%	54%	68%	60%
iTunes IT	62%	52%	86%	48%	72%	55%
iTunes LT	67%	100%	88%	44%	71%	55%
iTunes LU	63%	50%	81%	46%	68%	55%
iTunes LV	68%	100%	88%	46%	71%	57%
iTunes MT	67%		86%	48%	63%	56%
iTunes NL	78%	86%	91%	48%	79%	60%
iTunes PL	69%	69%	87%	49%	71%	58%
iTunes PT	66%	40%	87%	48%	73%	57%
iTunes SE	69%	75%	85%	51%	73%	60%
iTunes SI	67%	100%	88%	45%	72%	57%
iTunes SK	68%	100%	88%	46%	71%	57%
Average iTunes	65%	61%	86%	48%	70%	57%

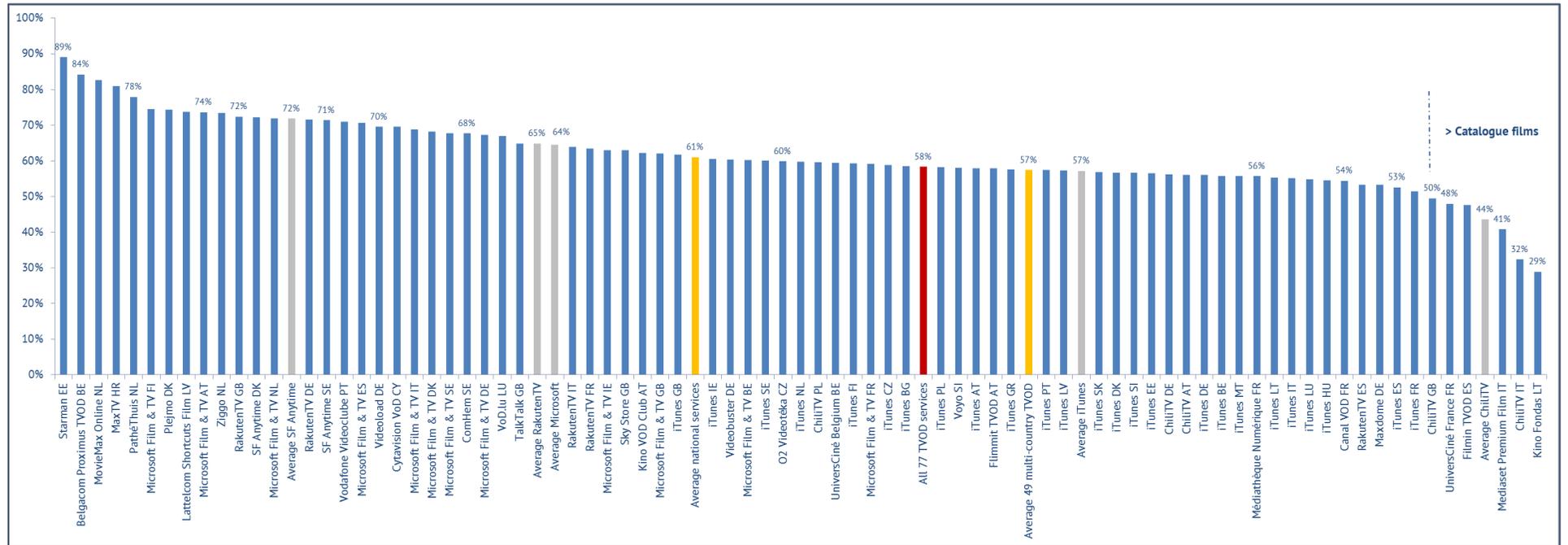
Source: European Audiovisual Observatory

Figure 43 Recent EU films in catalogues by TVOD services, in % of EU films



Source: European Audiovisual Observatory

Figure 44 Share of all recent films in TVOD catalogues by services, in % of all films



Source: European Audiovisual Observatory



2.4.3. Country and service circulation of catalogue and recent film titles

On the country circulation in one or more than one country of catalogue and recent film titles

50% of all catalogue titles were only available in 1 country, whereas this only concerned 40% of recent titles. The difference was the starkest for EU catalogue titles, for which 62% were only available in 1 country whereas for EU recent titles this figure was 53%. US catalogue titles were the less likely to be only available in 1 country, as this was the case for only 35% of US titles. For recent US titles, this figure is even 25%, showing the appeal of recent US productions.

Table 36 and Figure 46

Recent EU titles had the highest share of titles available in only 1 country with 53% of all EU titles (average all titles 40%), with other international titles having only 35% of titles available in 1 country, and EUR OBS titles have 38% of titles only available in one country. **Figure 45**

On the service circulation in one or more than one country of catalogue and recent film titles

As it was the case for country circulation, the same was true for EU catalogue titles circulation on services (but also due to a high number of specialised art house VOD services for EU and national films); 54% of all EU catalogue titles were only available on one TVOD services, whereas the average for all titles was 45%, with the share for US titles at 35%, for other international titles at 44% and for EUROBS titles at 49%. **Figure 48 and Table 37**

Recent titles circulated much better on more than one service and this for all regions of origin. On average, only 34% of recent titles were available on only one service; this concerned 43% of EU titles (the highest share for recent film titles being available on only one service), 23% of recent US titles, 28% of recent international titles and 32% of recent EUR OBS titles.

When it comes to circulation, recent film titles circulate better on TVOD services and in countries. Customers are more eager to see recent films. However, a large share of film titles available were catalogue films (an even split 50/50), showing that niche services specialising in national, EU or international catalogue films can also find their audiences.

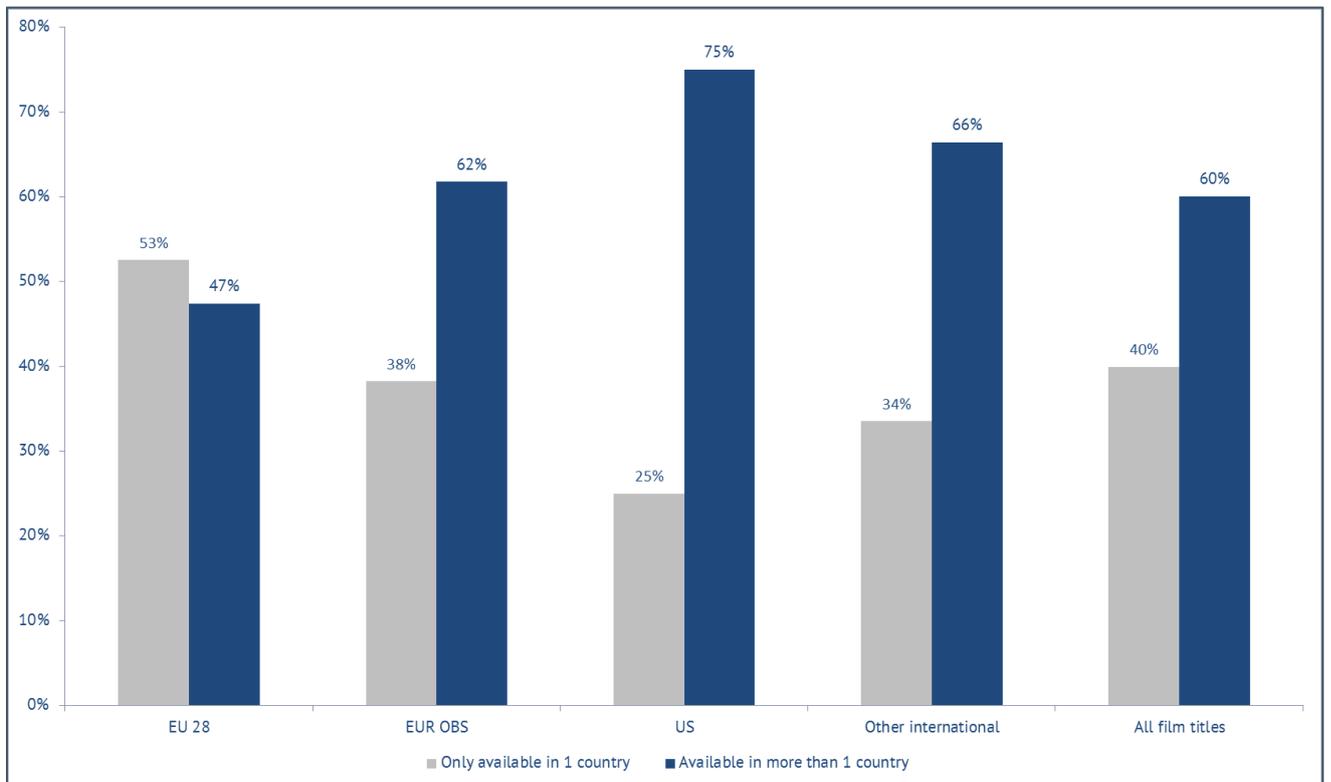
2.4.3.1. Country circulation of catalogue and recent film titles by region of origin

Table 36 Country circulation of catalogue & recent film titles in 1 and more than 1 country, by region of origin

Film titles	Catalogues film titles					Recent film titles				
	EU 28	EUR OBS	US	Other international	All film titles	EU 28	EUR OBS	US	Other international	All film titles
Only available in 1 country	8 131	173	3 829	1 480	13 613	6 947	330	2 284	1 495	11 056
Available in more than 1 country	4 999	129	6 977	1 642	13 747	6 265	533	6 850	2 960	16 608
Total film titles	13 130	302	10 806	3 122	27 360	13 212	863	9 134	4 455	27 664
Only available in 1 country	62%	57%	35%	47%	50%	53%	38%	25%	34%	40%
Available in more than 1 country	38%	43%	65%	53%	50%	47%	62%	75%	66%	60%
Total film titles	13 130	302	10 806	3 122	27 360	13 212	863	9 134	4 455	27 664

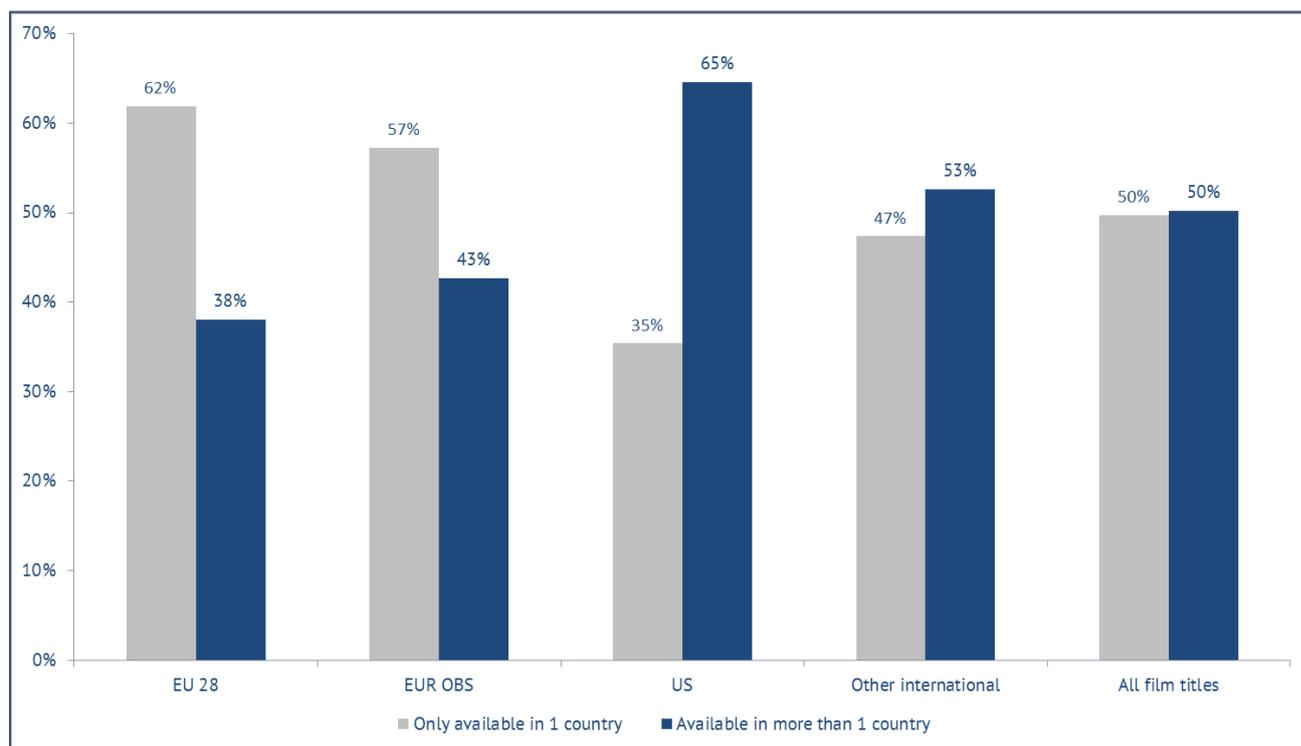
Source: European Audiovisual Observatory

Figure 45 Circulation of recent film titles in 1 and more than 1 country by region of origin, in %



Source: European Audiovisual Observatory

Figure 46 Circulation of catalogue film titles in 1 and more than 1 country by region of origin, in %



Source: European Audiovisual Observatory

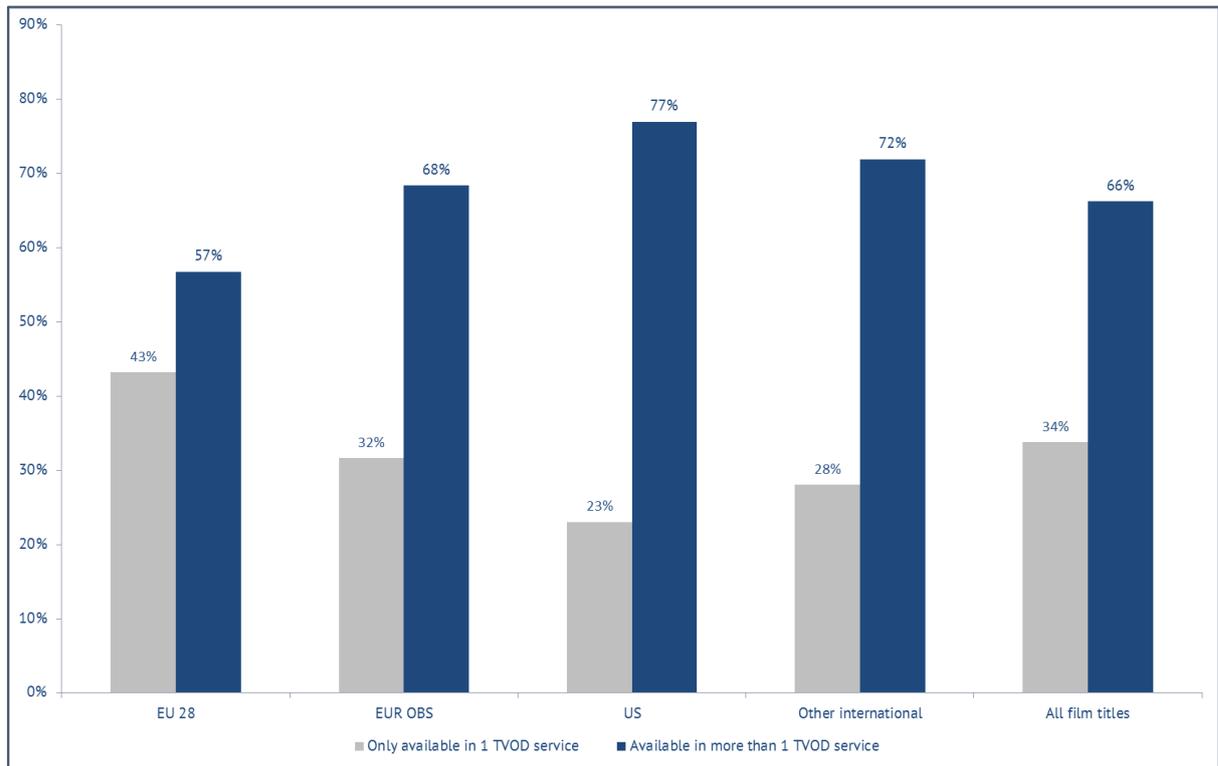
2.4.3.2. Service circulation of catalogue and recent film titles by region of origin

Table 37 Service circulation of catalogue & recent film titles in 1 and more than 1 service, by region of origin

Film titles	Catalogues film titles					Recent film titles				
	EU 28	EUR OBS	US	Other international	All film titles	EU 28	EUR OBS	US	Other international	All film titles
Only available in 1 TVOD service	7 104	149	3 729	1 359	12 341	5 712	273	2 106	1 251	9 342
Available in more than 1 TVOD service	6 026	153	7 077	1 763	15 019	7 500	590	7 028	3 204	18 322
Total film titles	13 130	302	10 806	3 122	27 360	13 212	863	9 134	4 455	27 664
Only available in 1 TVOD service	54%	49%	35%	44%	45%	43%	32%	23%	28%	34%
Available in more than 1 TVOD service	46%	51%	65%	56%	55%	57%	68%	77%	72%	66%

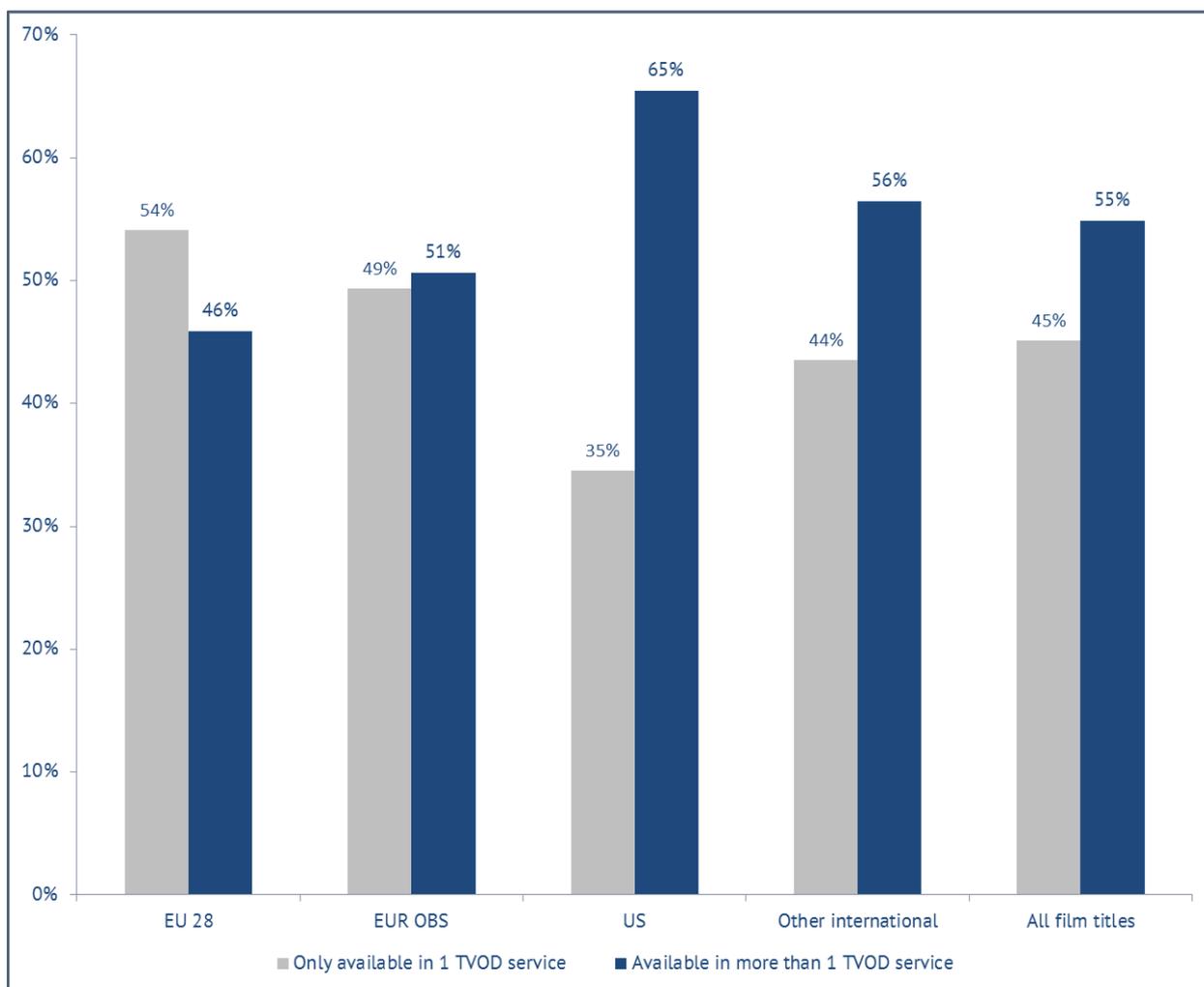
Source: European Audiovisual Observatory

Figure 47 Service circulation in 1 and more than 1 service of recent film titles by region of origin, in %



Source: European Audiovisual Observatory

Figure 48 Service circulation in 1 and more than 1 service of catalogue film titles by region of origin, in %



Source: European Audiovisual Observatory

3. Detailed analysis of Subscription VOD catalogues

3.1. Origin of films and film titles in 45 SVOD catalogues

Cumulative count of 84 699 films present in the 45 SVOD catalogues

For this figure, each occurrence of a film is counted

EU films had a share of 21% of all films, with 5% of national films and 16% of EU non-national films. **Table 39** and **Table 40**

US films had a share of 50%, other international films of 19% and films produced in EUR OBS countries of 2%.

8% of all films were not identified and therefore have no region of origin.

Unique count of 22 781 film titles in 45 SVOD catalogues.

For this figure, a film title is only counted once, regardless of the number of occurrences in catalogues

32% of unique film titles are of EU origin. **Figure 53** and **Table 43**

The largest share of unique film titles in the 45 SVOD catalogues are US film titles with 38%, followed by EU titles and then by other international film titles with 14% and EUR OBS film titles which accounted for 2%.

14% of all unique film titles have not been identified.

The following sections provide a more detailed overview on the regions and countries of origin of films and film titles found in the 45 SVOD catalogues.

**Table 38** The 45 SVOD catalogues of the service sample by country

Country	SVOD Services
AT	Netflix AT
BE	Belgacom Proximus TV BE
BE	Netflix BE
BE	Uncut Belgium BE
BG	HBO Go BG
BG	Netflix BG
CY	Netflix CY
CZ	Horizon/UPC CZ
CZ	Netflix CZ
CZ	Voyo Czech SVOD CZ
DE	Horizon Go DE
DE	Netflix DE
DE	realeyz DE
DK	C More Film DK
DK	Netflix DK
EE	Netflix EE
ES	Netflix ES
FI	C More Play FI
FI	Netflix FI
FR	Canal Play FR
FR	Netflix FR
FR	SFR Play FR
FR	Uncut France FR
GB	Amazon GB
GB	Netflix GB
GB	Sky Now GB
GR	Netflix GR
HR	Netflix HR
HU	Netflix HU
IE	Netflix IE
IE	Virgin Media On Demand Film
IT	Netflix IT
IT	TIMVISION IT
LT	Netflix LT
LV	Netflix LV
MT	Netflix MT
NL	Netflix NL
PL	Horizon/UPC PL
PL	Netflix PL
PT	Netflix PT
RO	Netflix RO
SE	C More Film Sweden SE
SE	Netflix SE
SI	Netflix SI
SK	Netflix SK

Source: European Audiovisual Observatory



3.1.1. Origin of films – General overview

Films: The measure reflects the share of films when all occurrences of a given film title are counted in all SVOD catalogues, the cumulative count of films; each occurrence of a film title counts for one.

On the origin of 84 699 films in 45 SVOD catalogues

21% of all films found in the SVOD catalogues of the sample (17 478 films) are of an EU 28 origin see **Table 39** and **Figure 49**. Of these EU films, 5% are national (4 187 films) and 16% EU non-national (13 291 films). **Table 40** and **Figure 50**

Films with an US origin represent 50% of all films (41 935 films), followed by films with another international origin with 19% (16 292 films) and films produced in EUR OBS countries with 2% (2 007 films). 8% of all films have not been identified with their country of production and thus region of origin (6 987 films).

On the countries of production of films in SVOD catalogues

When only films for which the country of production is identified are taken into account (and therefore the number of films passes to 77 712), as it was the case for TVOD, US films represent 54% of all films, followed by Indian films with 7.2% of all films, British films (6.8%), German films (3.4%) and French films (3.4%). **Figure 51** and **Table 41**

5 other EU countries are in the top 20 of production countries; Spain (1.8%) at rank 7, Sweden (1.4%) at rank 9, Italy (1.2%) at rank 10, the Czech Republic (0.9%) at rank 15 and Denmark with 0.7% at rank 19. Turkey is the sole country of the EUR OBS region at rank 8 with 1.7% of all films.

10 other international countries are included in the top 20 of production countries with India, notably Canada at rank 6 with 3% of all films, and from the 11th to the 14th place Australia, Brazil, Mexico and Argentina with each accounting for 1% to 1.2% of all films. Finally, the top 20 list is completed by Asian countries with Japan at rank 16 (0.8%), followed by South Korea 0.8%), China (0.7%) and Honk Kong (0.7%) at the rank 20.

The top 20 countries of production represent 92.8% of all films available in the 45 SVOD catalogues. The 27 catalogues of Netflix account for a large proportion of EUR OBS and other international films, showing the growing diversification of the service and the acquisition of multiple film titles in different production countries in order to complete the country catalogues of the pan-European SVOD service.

All in all, 117 different production countries for the films found in the catalogues exist, with the bottom 97 countries accounting for 7.2% of films or 5 631 films (close to the figure for only Indian films to put this into context).

On the origin of EU films in the SVOD catalogues

British films accounted for the lion share, and by a large margin; of the 17 478 EU films in the catalogues, 30.4% were produced in the United Kingdom (5 308 films). At distance, were films produced in Germany with 15.2% (2 665 films) and France with also 15.2% (2 651 films) at rank 2 and 3. **Table 42**

Spanish films followed with 8% of all EU films and Swedish films completed the top 5 of EU production countries with 6.1%. This top 5 of EU production countries accounted for 74.8% of all EU films in SVOD catalogues. Italian films are at rank 6 with 5.5%; the higher number of Swedish films than Italian ones is explained by the presence of 3 C More catalogues, a Swedish service, in 3 Nordic countries and only one Italian national service, TIMVision.

The top 10 EU production countries represented 92.4% of all EU films available. 13 EU countries had less than 100 films in the catalogues, and no Maltese film was found in any of the 45 SVOD catalogues. **Figure 52**

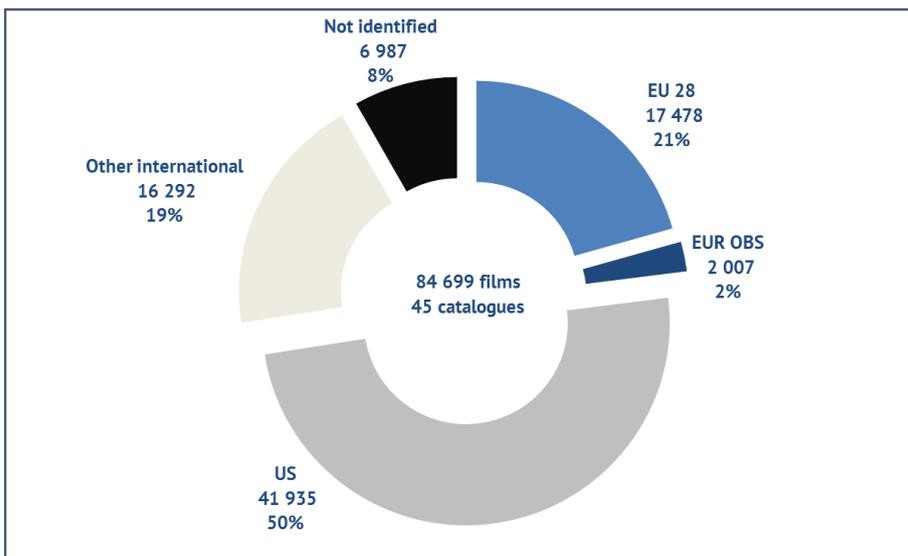
3.1.1.1. Region of origin of films

Table 39 Origin of 84 699 films in 45 SVOD catalogues

	EU 28	EUR OBS	US	Other international	Not identified	Total
Number of films - 45 SVOD catalogues	17 478	2 007	41 935	16 292	6 987	84 699
<i>in percentage of total</i>	21%	2%	50%	19%	8%	100%

Source: European Audiovisual Observatory

Figure 49 Origin of 84 699 films in 45 SVOD catalogues



Source: European Audiovisual Observatory

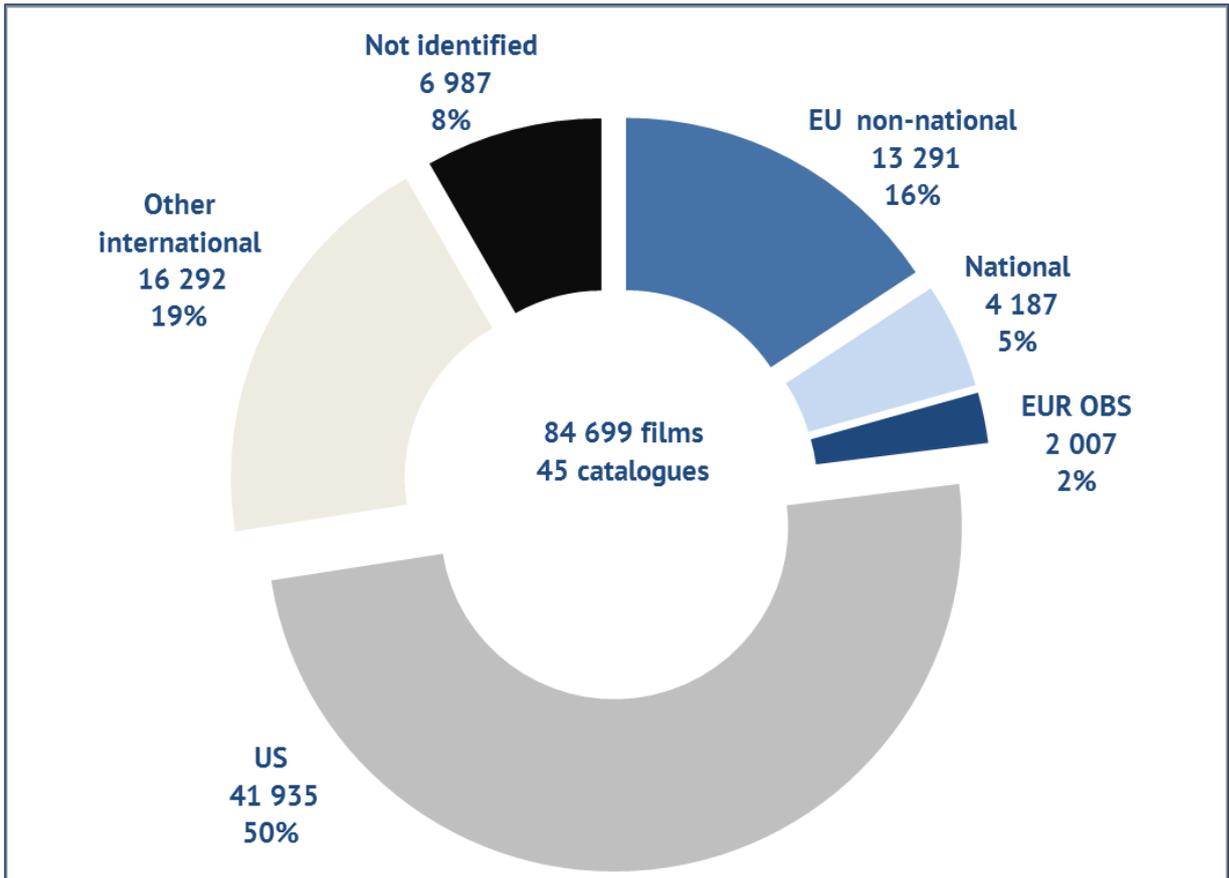


Table 40 Origin of 84 699 films in 45 SVOD catalogues – distinction EU non-national and national

	EU non-national	National	EUR OBS	US	Other international	Not identified	Total
Number of films - 45 SVOD catalogues	13 291	4 187	2 007	41 935	16 292	6 987	84 699
<i>in percentage of total</i>	16%	5%	2%	50%	19%	8%	100%

Source: European Audiovisual Observatory

Figure 50 Origin of 84 699 films in 45 SVOD catalogues – distinction EU non-national and national



Source: European Audiovisual Observatory



3.1.1.2. Country of origin of films

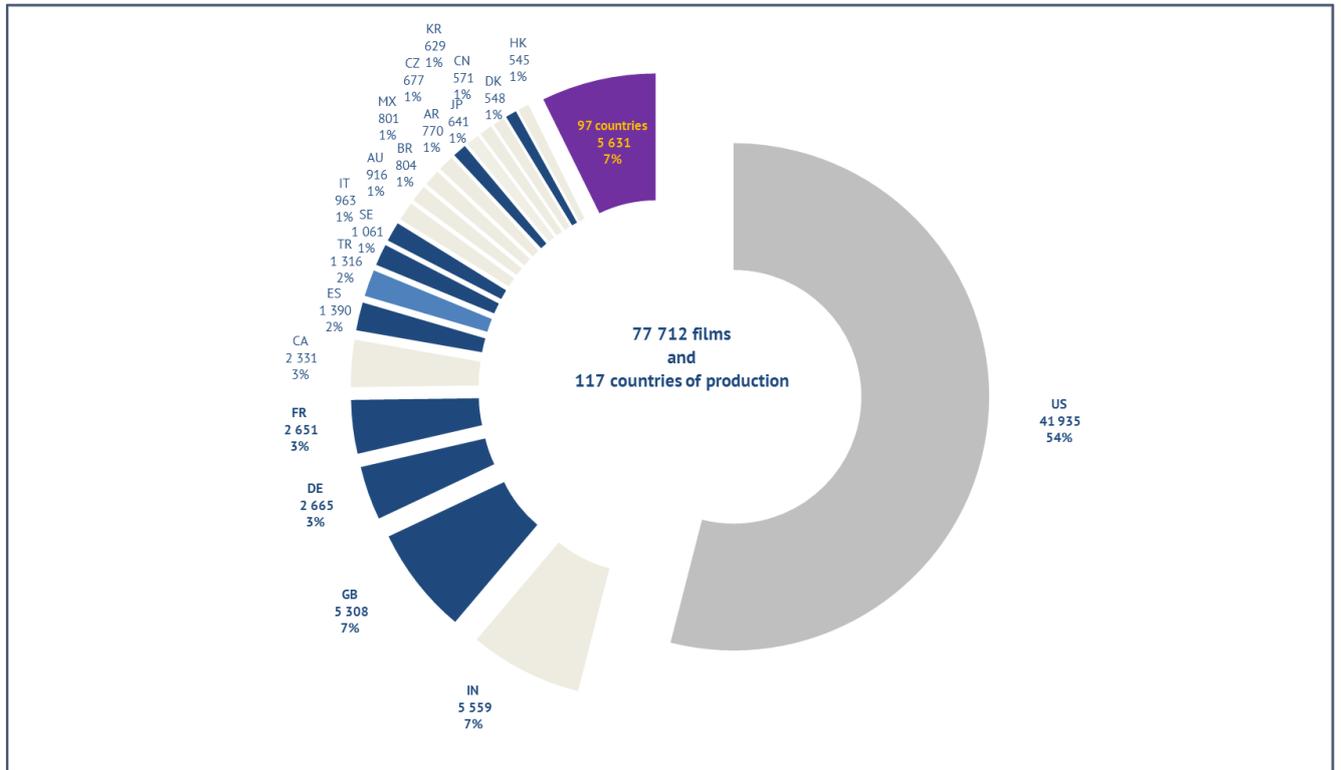
Table 41 Top 20 – Countries of production of identified films in 45 SVOD catalogues

Rank	Country of production	Count of title	In % of total films identified	Cumulutative %	Region
1	US	41 935	54,0%	54,0%	US
2	IN	5 559	7,2%	61,1%	INT
3	GB	5 308	6,8%	67,9%	EU
4	DE	2 665	3,4%	71,4%	EU
5	FR	2 651	3,4%	74,8%	EU
6	CA	2 331	3,0%	77,8%	INT
7	ES	1 390	1,8%	79,6%	EU
8	TR	1 316	1,7%	81,3%	EUROBS
9	SE	1 061	1,4%	82,6%	EU
10	IT	963	1,2%	83,9%	EU
11	AU	916	1,2%	85,1%	INT
12	BR	804	1,0%	86,1%	INT
13	MX	801	1,0%	87,1%	INT
14	AR	770	1,0%	88,1%	INT
15	CZ	677	0,9%	89,0%	EU
16	JP	641	0,8%	89,8%	INT
17	KR	629	0,8%	90,6%	INT
18	CN	571	0,7%	91,3%	INT
19	DK	548	0,7%	92,1%	EU
20	HK	545	0,7%	92,8%	INT
21-117	97 countries	5 631	7,2%	100,0%	
	Total 117 countries	77 712	100%	100%	

Source: European Audiovisual Observatory



Figure 51 Top 20 – Countries of production of identified films in 45 SVOD catalogues



Source: European Audiovisual Observatory



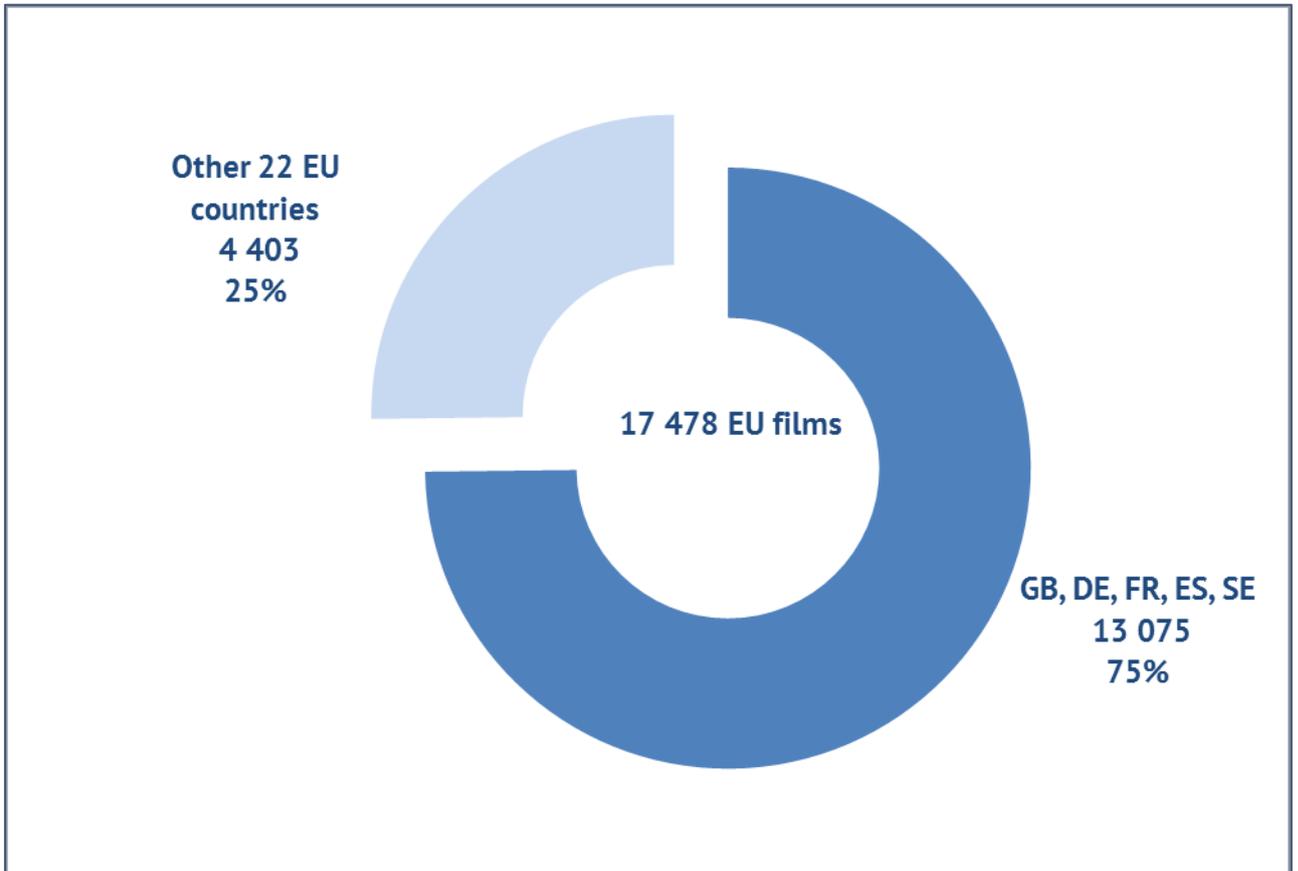
Table 42 SVOD – Ranking of EU countries by number of films

Overall Rank	EU rank	Country of production	Total films	In % of EU films	Cumulative % EU films
3	1	GB	5 308	30,4%	30,4%
4	2	DE	2 665	15,2%	45,6%
5	3	FR	2 651	15,2%	60,8%
7	4	ES	1 390	8,0%	68,7%
9	5	SE	1 061	6,1%	74,8%
10	6	IT	963	5,5%	80,3%
15	7	CZ	677	3,9%	84,2%
19	8	DK	548	3,1%	87,3%
21	9	NL	503	2,9%	90,2%
22	10	AT	389	2,2%	92,4%
23	11	BE	350	2,0%	94,4%
26	12	IE	269	1,5%	96,0%
32	13	FI	142	0,8%	96,8%
33	14	PL	142	0,8%	97,6%
48	15	RO	52	0,3%	97,9%
49	16	SK	51	0,3%	98,2%
51	17	BG	50	0,3%	98,5%
52	18	PT	50	0,3%	98,8%
54	19	EE	42	0,2%	99,0%
58	20	HR	37	0,2%	99,2%
59	21	HU	36	0,2%	99,4%
63	22	GR	30	0,2%	99,6%
71	23	SI	22	0,1%	99,7%
72	24	LT	19	0,1%	99,8%
73	25	LU	18	0,1%	99,9%
74	26	LV	12	0,1%	100,0%
102	27	CY	1	0,0%	100,0%
-	-	Total EU 28	17 478	100%	100

Source: European Audiovisual Observatory



Figure 52 EU films – Share of top 5 EU productions countries and rest of EU countries – film volume SVOD



Source: European Audiovisual Observatory



3.1.2. Origin of film titles – General overview

Unique film titles: This statistics measures only a film title once, even if it has more than one occurrence in several catalogues. The figure reflects the potential availability of unique film titles (as opposed to the volume of films in the section before). Generally, EU film titles have a higher share than EU films (cumulative) whereas US unique film titles have a lower share than US films (cumulative). These differences come from a lower circulation on services and in countries for EU film titles and a higher circulation for US film titles.

On the origin of 22 781 unique film titles in 45 SVOD catalogues

32% of unique film titles are of EU origin (7 349 unique film titles). **Figure 53** and **Table 43**

The largest share of unique film titles in the 45 SVOD catalogues are US film titles with 38% (8 564 film titles), followed by other international film titles with 14% (3 148 titles) and EUR OBS film titles which accounted for 2% (417 titles).

3 303 film titles could not be identified with their country of production (14% of the total of unique film titles, one service, Amazon Prime in the United Kingdom, accounted for 2 087 film titles which were not matched with a country production, or 63% of all not identified film titles in the 45 SVOD catalogues) due to the presence of videos and content not identified by any database. **Table 50** and **Table 51**

On the countries of production of 19 478 identified unique film titles in SVOD catalogues

As before, the number of unique film titles excludes the 3 303 not identified film titles, the sample is now 19 478 identified unique film titles.

US film titles accounted for 44% of all identified unique film titles, followed at distance by 3 EU countries; Germany with 7.7% of all titles (1 491 unique titles), the United Kingdom with 6.9% (1 352 titles) and France with 6.6% or 1 286 titles. The top 5 is completed by Indian film titles with 692 or 3.6%. These top 5 production countries represented 68.7% of all unique film titles available in the 45 SVOD catalogues. **Table 44** and **Figure 54**

8 other EU countries are in the top 20 list of producers of film titles available in 45 SVOD catalogues, with share ranging from 3% of all titles to 0.9%. In order these production countries are: from the 7th to the 11th place the Czech Republic (3%), Italy (2.9%), Sweden (2.1%), Austria (1.5%) and Spain (1.4%). Rank 13 and 14 are taken by Denmark (1.2%) and Belgium (1.1%) and the last EU country in this top 20 list is the Netherlands at rank 17 with 0.9% of all unique film titles.

Norway is the only EUR OBS country at rank 20 with 0.6% of all unique film titles or 108 titles.

In addition to India, 6 other international countries are in the top list; Canada at rank 6, Australia rank 12, Hong Kong and Japan and rank 15 to 16 and South Korea and China at rank 18 and 19.

The top 20 production countries of unique film titles represented 91% of all unique film titles available on our sample of SVOD services, with the bottom 97 countries accounting for 9% of titles or 1 754 unique film titles.

The proportion is similar than what has been observed in the top 20 of films (cumulative) however, several countries of production of films in volume have disappeared from the top list of unique film titles, showing that with a lesser number of unique film titles their wider circulation enables them to account for a larger volume of cumulative films. These countries are: Turkey (at rank 8 in top 20 films list), Brazil (rank 12 before), Mexico (13) and Argentina (14).

Countries which did not figure in the top 20 list of films by volume but have entered the top list of unique film titles, and thus have a narrower circulation on SVO services, are Austria, Belgium, the Netherlands and Norway.

On the origin of 7 349 unique EU film titles in 45 SVOD services

Film titles of 27 EU countries were found in the catalogues, ranging from German titles which accounted for 20.3% of all EU unique titles to a film title produced in Cyprus. No film produced in Malta was found in the sample.

Table 45

The top 5 EU production countries accounted for 71.7% of all EU titles; Germany, the United Kingdom (18.4% of EU unique titles), France (17.5%), the Czech Republic (7.9%) and Italy (7.6%). **Figure 55**

The top 10 EU production countries represented 91.2% of all EU film titles; Sweden (5.6%), Austria (4%), Spain (3.8%), Denmark (3.1%) and Belgium (2.9%) complete the top 5 EU titles production list.

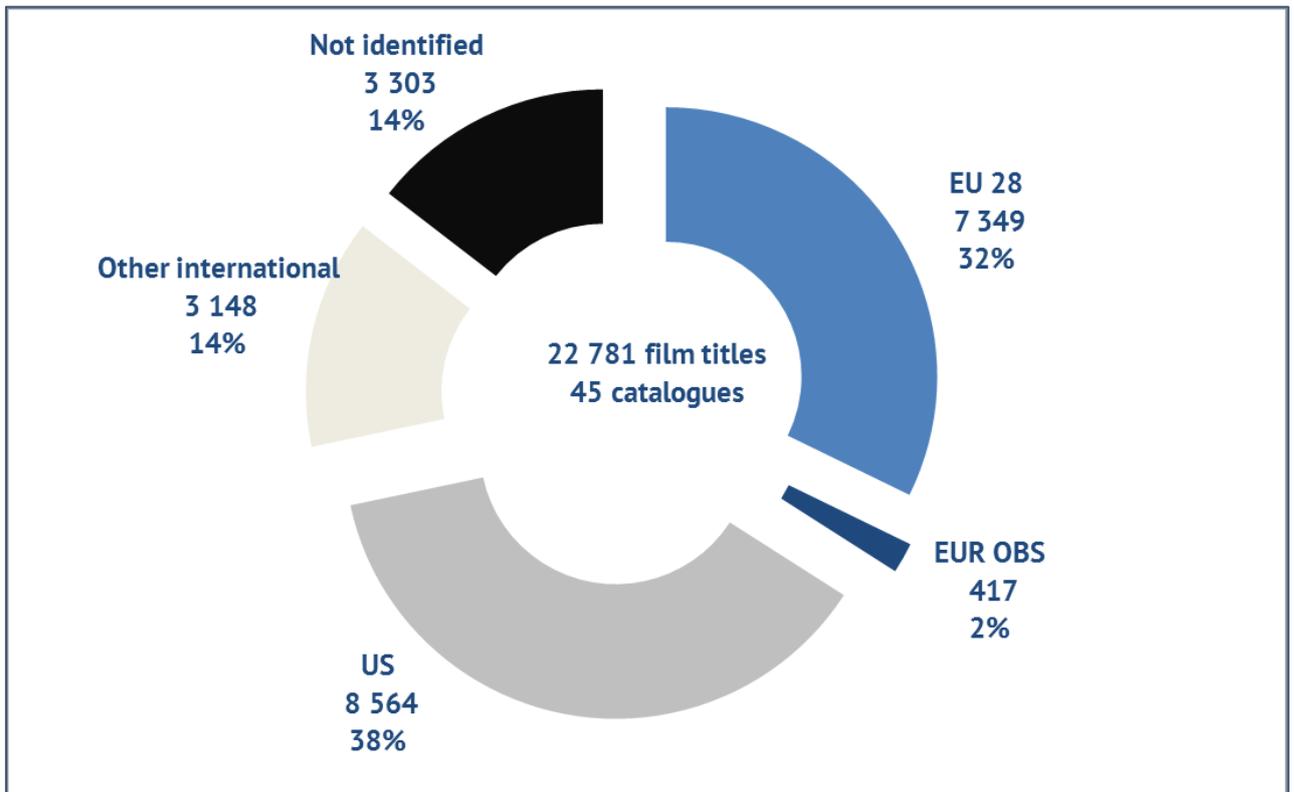
With the exception of the Netherlands (2.4% or 178 unique titles), all other EU countries had less than 100 titles available, ranging from Poland with 91 titles (1.2%) to Slovenia (4 titles or 0.1%) to Cyprus (1 title).

Table 43 **Origin of 22 781 film titles in 45 SVOD catalogues**

	EU 28	EUR OBS	US	Other international	Not identified	Total
Number of film titles 45 SVOD catalogues	7 349	417	8 564	3 148	3 303	22 781
<i>in percentage of total</i>	32%	2%	38%	14%	14%	100%

Source: European Audiovisual Observatory

Figure 53 Origin of 22 781 film titles in 45 SVOD catalogues



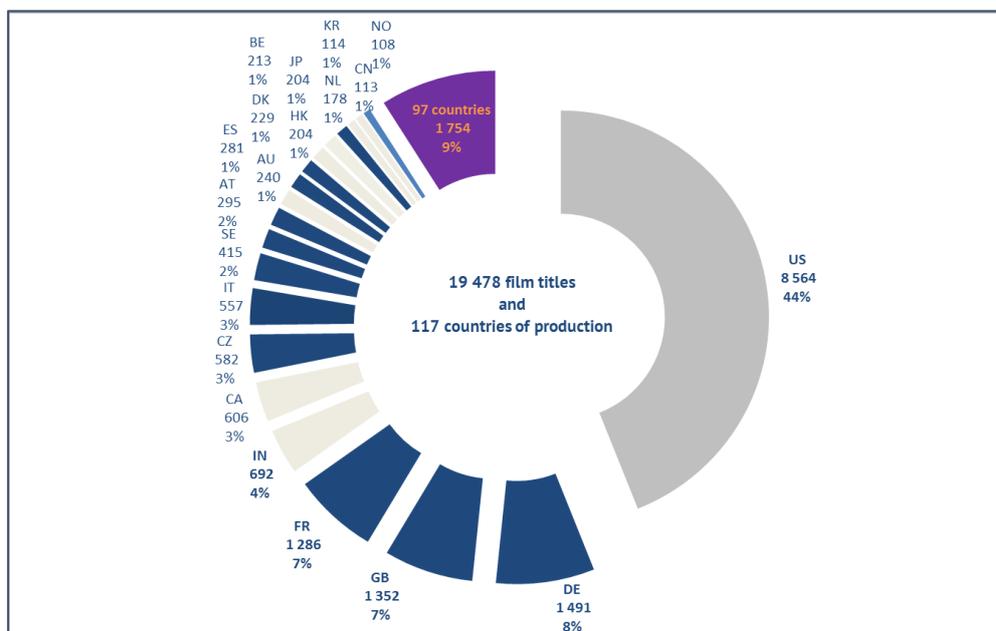
Source: European Audiovisual Observatory

Table 44 Top 20 – Countries of production of identified film titles in 45 SVOD catalogues

Overall rank	Country of production	Total film titles	In % of total film titles identified	Cumulative %	Region
1	US	8 564	44,0%	44,0%	US
2	DE	1 491	7,7%	51,6%	EU
3	GB	1 352	6,9%	58,6%	EU
4	FR	1 286	6,6%	65,2%	EU
5	IN	692	3,6%	68,7%	INT
6	CA	606	3,1%	71,8%	INT
7	CZ	582	3,0%	74,8%	EU
8	IT	557	2,9%	77,7%	EU
9	SE	415	2,1%	79,8%	EU
10	AT	295	1,5%	81,3%	EU
11	ES	281	1,4%	82,8%	EU
12	AU	240	1,2%	84,0%	INT
13	DK	229	1,2%	85,2%	EU
14	BE	213	1,1%	86,3%	EU
15	HK	204	1,0%	87,3%	INT
16	JP	204	1,0%	88,4%	INT
17	NL	178	0,9%	89,3%	EU
18	KR	114	0,6%	89,9%	INT
19	CN	113	0,6%	90,4%	INT
20	NO	108	0,6%	91,0%	EUROBS
21-117	97 countries	1 754	9,0%	100,0%	
	Total 117 countries	19 478	100%	100%	

Source: European Audiovisual Observatory

Figure 54 Top 20 – Countries of production of identified film titles in 45 SVOD catalogues



Source: European Audiovisual Observatory

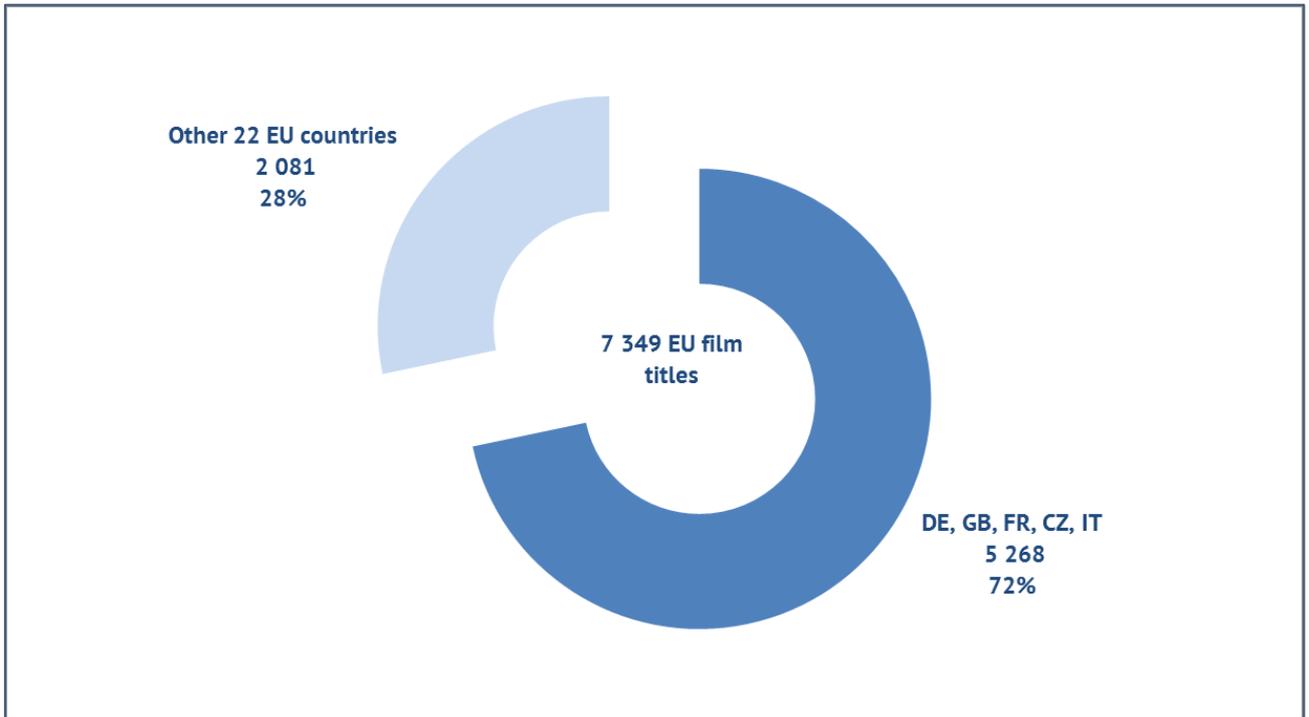


Table 45 Ranking of EU countries by number of film titles – EU 27 / SVOD

Overall rank	EU Rank	Country of production	Total film titles	In % of total film titles identified	Cumulative %
2	1	DE	1 491	20,3%	20,3%
3	2	GB	1 352	18,4%	38,7%
4	3	FR	1 286	17,5%	56,2%
7	4	CZ	582	7,9%	64,1%
8	5	IT	557	7,6%	71,7%
9	6	SE	415	5,6%	77,3%
10	7	AT	295	4,0%	81,3%
11	8	ES	281	3,8%	85,2%
13	9	DK	229	3,1%	88,3%
14	10	BE	213	2,9%	91,2%
17	11	NL	178	2,4%	93,6%
24	12	PL	91	1,2%	94,8%
25	13	IE	84	1,1%	96,0%
28	14	FI	70	1,0%	96,9%
35	15	RO	42	0,6%	97,5%
38	16	SK	35	0,5%	98,0%
42	17	HU	27	0,4%	98,4%
44	18	BG	25	0,3%	98,7%
45	19	GR	23	0,3%	99,0%
48	20	LT	19	0,3%	99,3%
54	21	EE	11	0,1%	99,4%
55	22	LU	11	0,1%	99,6%
57	23	HR	9	0,1%	99,7%
58	24	LV	9	0,1%	99,8%
61	25	PT	9	0,1%	99,9%
76	26	SI	4	0,1%	100,0%
101	27	CY	1	0,0%	100,0%
-	-	Total EU 27	7 349	100%	100%

Source: European Audiovisual Observatory

Figure 55 Top EU 5 production countries and Rest of the EU compared to EU film titles volume



Source: European Audiovisual Observatory

3.2. SVOD service catalogues – detailed overview of the origin of films

National and multi-country SVOD services compared

In the sample, only 3 multi-country SVOD services out of 5 have several country catalogues: Netflix (27 catalogues), Horizon GO/Virgin Media (4 catalogues - Liberty Global) and C More (3 catalogues). Multi-country SVOD services, which had only 1 catalogue present in our sample, are HBO Go in Bulgaria and Amazon Prime Video in the United Kingdom. In total, multi-country SVOD represent 36 country catalogues while national SVOD services accounted for 9 catalogues. Sub-sections 2.2.2 (national services) and 2.2.3 (multi-country services) provide a detailed overview of each country catalogue regarding the region of origins of films in the catalogue.

On the regions of origin of films

Strong differences in the shares by region of origin exist between the 2 types of services, national and multi-country. National services had a share of EU films of 48% while multi-country services (hereafter MCS) had a share of 18%, for an overall average for the 45 services of 21% of EU films in the catalogues. On the other hand, MCS had a higher share of US films with 51% compared to 37% for national services and of international films with 20% compared to 11% for national services. Both types of services had a share of 2% of EUR OBS films.

Figure 56

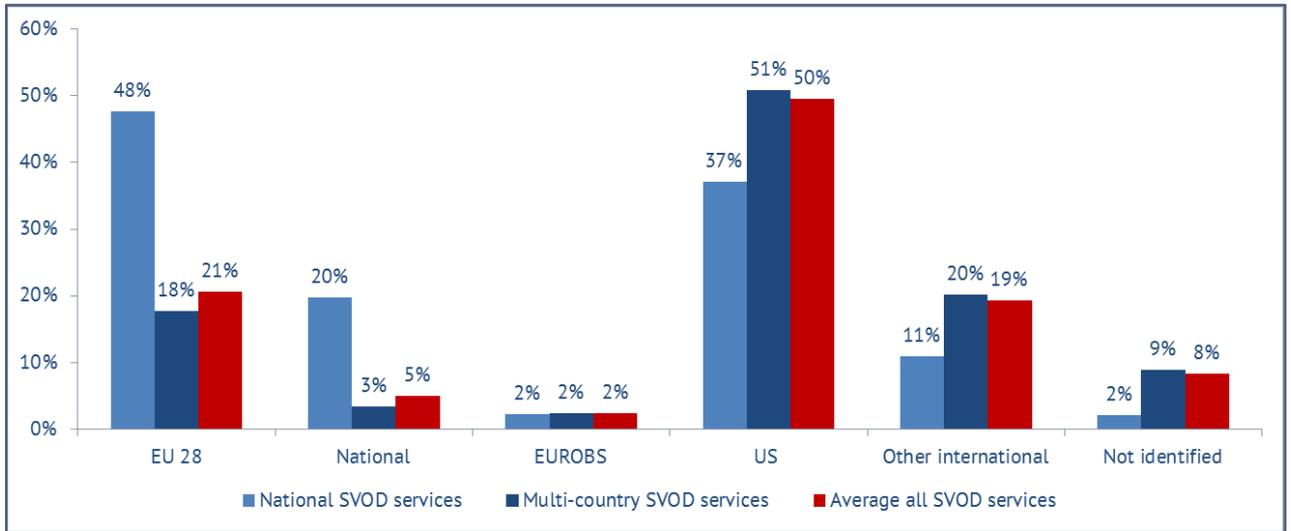
When it comes to the split of EU films between national and EU non-national films, without surprise national services had a share of national films almost 7 times higher than MCS with 20% compared to only 3% for MCS. This shows the focus of national players on productions of their home country whereas MCS tend to offer their exclusive or original films on most of their catalogues and completing their offer with only a small proportion of national films. **Figure 57**

This is demonstrated by the higher share of EU non-national films in MCS catalogues; though still half of the share of national services. MCS had on average a share of 14% of EU non-national films whereas national services had a share of 28% of EU non-national films. Therefore, the weight of national films in the overall share of EU films is twice higher for national services with 41% of national films making up their EU 28 film offering than MCS for which national films represented only 19% of their EU 28 film offer. **Figure 57**

MCS had more than twice as much films in their catalogues than national services, with on average 2 178 films for MCS and 931 for national services.

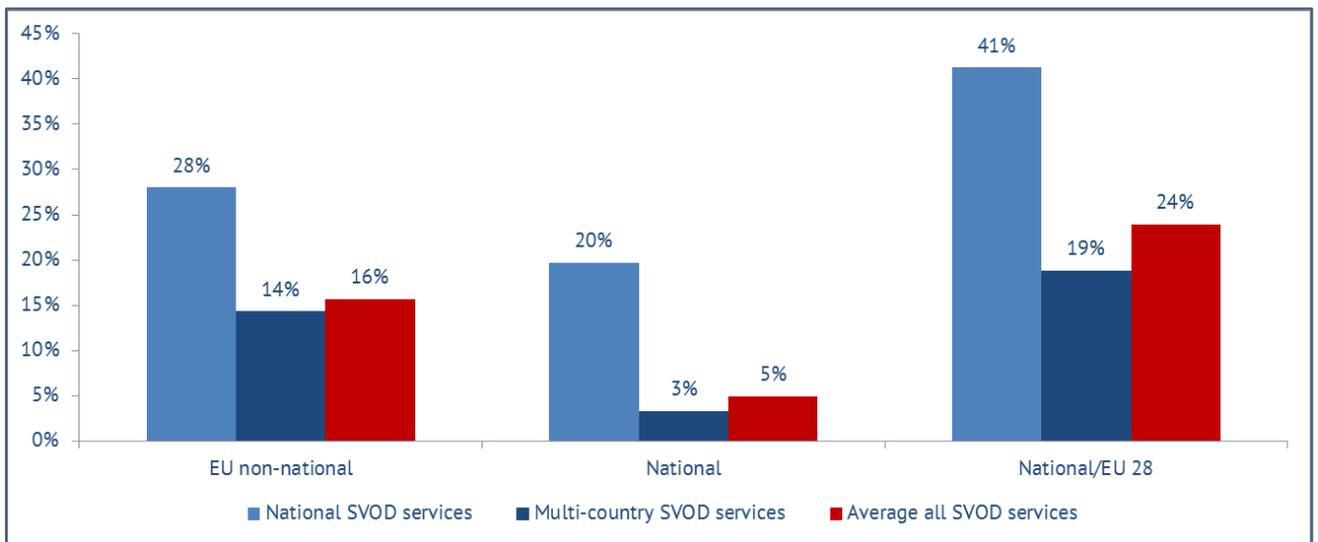
Figure 58

Figure 56 Comparison national and multi-country SVOD services, average share of origin of films, in %



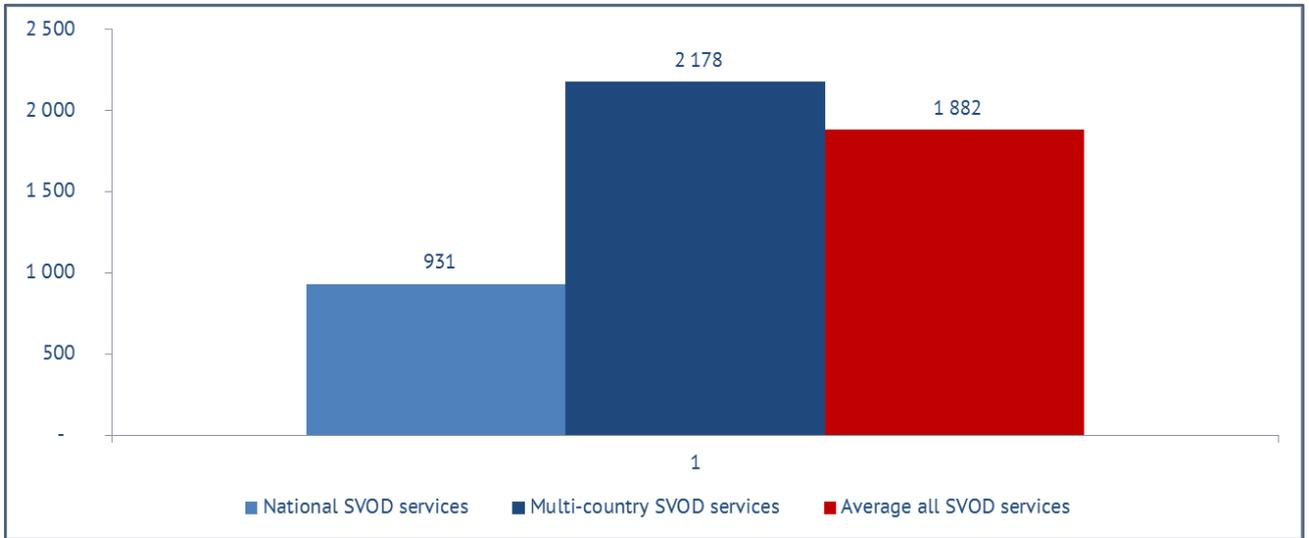
Source: European Audiovisual Observatory

Figure 57 Comparison national and multi-country SVOD services, EU non-national and national films, in %



Source: European Audiovisual Observatory

Figure 58 Comparison national and multi-country SVOD services, Average sizes of film catalogues, in numbers



Source: European Audiovisual Observatory

3.2.1. 45 SVOD catalogues – Detailed overview

The 45 catalogues of the SVOD service sample in overview

The 9 national services are analysed in detail in section 2.2.2 and the 45 MCS catalogues in section 2.2.3.



Table 46 SVOD services – films by region of origin, in numbers

Name of SVOD service - Country	EU 28	EUR OBS	US	Other international	Not identified	Total	of which national	Type of service
Amazon GB	850	46	2 122	953	2 087	6 058	365	Multi-country
Belgacom Proximus TV BE	194	4	81	30	1	310	7	National
C More Film DK	398	28	284	26	-	736	37	Multi-country
C More Film Sweden SE	406	28	285	28	-	747	266	Multi-country
C More Play FI	296	15	263	27	58	659	29	Multi-country
Canal Play FR	412	11	385	60	2	870	279	National
HBO Go BG	205	15	502	61	95	878	5	Multi-country
Horizon Go DE	1 338	94	1 058	407	225	3 122	741	Multi-country
Horizon/UPC CZ	322	9	296	78	222	927	126	Multi-country
Horizon/UPC PL	56	1	46	3	61	167	3	Multi-country
Netflix AT	320	53	1 175	383	132	2 063	3	Multi-country
Netflix BE	449	55	1 365	459	149	2 477	7	Multi-country
Netflix BG	284	56	1 123	532	164	2 159	-	Multi-country
Netflix CY	263	58	1 094	514	157	2 086	-	Multi-country
Netflix CZ	296	57	1 218	638	167	2 376	-	Multi-country
Netflix DE	351	52	1 193	399	143	2 138	115	Multi-country
Netflix DK	417	71	1 344	389	101	2 322	81	Multi-country
Netflix EE	281	57	1 137	531	166	2 172	1	Multi-country
Netflix ES	345	54	1 228	447	101	2 175	88	Multi-country
Netflix FI	418	71	1 503	396	101	2 489	5	Multi-country
Netflix FR	390	55	1 190	489	137	2 261	135	Multi-country
Netflix GB	541	66	1 774	802	217	3 400	279	Multi-country
Netflix GR	211	55	574	374	124	1 338	-	Multi-country
Netflix HR	260	56	1 115	528	162	2 121	1	Multi-country
Netflix HU	279	56	1 116	529	162	2 142	-	Multi-country
Netflix IE	523	64	1 768	693	210	3 258	14	Multi-country
Netflix IT	428	56	1 252	424	104	2 264	103	Multi-country
Netflix LT	297	58	1 220	642	170	2 387	-	Multi-country
Netflix LV	281	57	1 137	532	166	2 173	-	Multi-country
Netflix MT	391	60	1 314	633	189	2 587	-	Multi-country
Netflix NL	399	57	1 129	402	111	2 098	83	Multi-country
Netflix PL	268	54	1 222	394	127	2 065	7	Multi-country
Netflix PT	408	56	1 354	501	152	2 471	2	Multi-country
Netflix RO	528	65	1 767	695	209	3 264	-	Multi-country
Netflix SE	424	78	1 348	405	107	2 362	41	Multi-country
Netflix SI	261	56	1 115	528	165	2 125	-	Multi-country
Netflix SK	280	56	1 123	530	162	2 151	1	Multi-country
realeyz DE	998	70	221	203	3	1 495	479	National
SFR Play FR	76	5	114	6	6	207	43	National
Sky Now GB	193	7	1 022	86	24	1 332	98	National
TIMVISION IT	200	3	251	40	15	509	87	National
Uncut Belgium BE	782	34	281	191	-	1 288	152	National
Uncut France FR	27	3	2	3	-	35	15	National
Virgin Media On Demand Film IE	17	-	70	11	8	106	-	Multi-country
Voyo Czech SVOD CZ	1 115	45	754	290	125	2 329	489	National
Total 45 SVOD catalogues	17 478	2 007	41 935	16 292	6 987	84 699	4 187	45
Total 9 national SVOD catalogues	3 997	182	3 111	909	176	8 375	1 649	9
Total 36 multi-country catalogues	13 481	1 825	38 824	15 383	6 811	76 324	2 538	36

Source: European Audiovisual Observatory



Table 47 SVOD services – films by region of origin, in % of total catalogue

Name of SVOD service - Country	EU 28	EUR OBS	US	Other international	Not identified	Total	of which national	Type of service
Amazon GB	14%	1%	35%	16%	34%	6 058	6%	Multi-country
Belgacom Proximus TV BE	63%	1%	26%	10%	0%	310	2%	National
C More Film DK	54%	4%	39%	4%	0%	736	5%	Multi-country
C More Film Sweden SE	54%	4%	38%	4%	0%	747	36%	Multi-country
C More Play FI	45%	2%	40%	4%	9%	659	4%	Multi-country
Canal Play FR	47%	1%	44%	7%	0%	870	32%	National
HBO Go BG	23%	2%	57%	7%	11%	878	1%	Multi-country
Horizon Go DE	43%	3%	34%	13%	7%	3 122	24%	Multi-country
Horizon/UPC CZ	35%	1%	32%	8%	24%	927	14%	Multi-country
Horizon/UPC PL	34%	1%	28%	2%	37%	167	2%	Multi-country
Netflix AT	16%	3%	57%	19%	6%	2 063	0%	Multi-country
Netflix BE	18%	2%	55%	19%	6%	2 477	0%	Multi-country
Netflix BG	13%	3%	52%	25%	8%	2 159	0%	Multi-country
Netflix CY	13%	3%	52%	25%	8%	2 086	0%	Multi-country
Netflix CZ	12%	2%	51%	27%	7%	2 376	0%	Multi-country
Netflix DE	16%	2%	56%	19%	7%	2 138	5%	Multi-country
Netflix DK	18%	3%	58%	17%	4%	2 322	3%	Multi-country
Netflix EE	13%	3%	52%	24%	8%	2 172	0%	Multi-country
Netflix ES	16%	2%	56%	21%	5%	2 175	4%	Multi-country
Netflix FI	17%	3%	60%	16%	4%	2 489	0%	Multi-country
Netflix FR	17%	2%	53%	22%	6%	2 261	6%	Multi-country
Netflix GB	16%	2%	52%	24%	6%	3 400	8%	Multi-country
Netflix GR	16%	4%	43%	28%	9%	1 338	0%	Multi-country
Netflix HR	12%	3%	53%	25%	8%	2 121	0%	Multi-country
Netflix HU	13%	3%	52%	25%	8%	2 142	0%	Multi-country
Netflix IE	16%	2%	54%	21%	6%	3 258	0%	Multi-country
Netflix IT	19%	2%	55%	19%	5%	2 264	5%	Multi-country
Netflix LT	12%	2%	51%	27%	7%	2 387	0%	Multi-country
Netflix LV	13%	3%	52%	24%	8%	2 173	0%	Multi-country
Netflix MT	15%	2%	51%	24%	7%	2 587	0%	Multi-country
Netflix NL	19%	3%	54%	19%	5%	2 098	4%	Multi-country
Netflix PL	13%	3%	59%	19%	6%	2 065	0%	Multi-country
Netflix PT	17%	2%	55%	20%	6%	2 471	0%	Multi-country
Netflix RO	16%	2%	54%	21%	6%	3 264	0%	Multi-country
Netflix SE	18%	3%	57%	17%	5%	2 362	2%	Multi-country
Netflix SI	12%	3%	52%	25%	8%	2 125	0%	Multi-country
Netflix SK	13%	3%	52%	25%	8%	2 151	0%	Multi-country
realeyz DE	67%	5%	15%	14%	0%	1 495	32%	National
SFR Play FR	37%	2%	55%	3%	3%	207	21%	National
Sky Now GB	14%	1%	77%	6%	2%	1 332	7%	National
TIMVISION IT	39%	1%	49%	8%	3%	509	17%	National
Uncut Belgium BE	61%	3%	22%	15%	0%	1 288	12%	National
Uncut France FR	77%	9%	6%	9%	0%	35	43%	National
Virgin Media On Demand Film IE	16%	0%	66%	10%	8%	106	0%	Multi-country
Voyo Czech SVOD CZ	48%	2%	32%	12%	5%	2 329	21%	National
Average 45 SVOD catalogues	21%	2%	50%	19%	8%	84 699	5%	45
Average 9 national catalogues	48%	2%	37%	11%	2%	8 375	20%	9
Average 36 multi-country catalogues	18%	2%	51%	20%	9%	76 324	3%	36

Source: European Audiovisual Observatory



3.2.2. 9 National SVOD services

Overall shares of 9 national SVOD services by the region of origin of films

On average 48% of all films in the 9 catalogues were of EU origin, with 4 services having more than 60% of EU films in their catalogues: 77% for Uncut France (out of 35 films), 67% for realeyz in Germany, 63% for Belgacom's Proximus and 61% for Uncut Belgium, with the lowest share for Sky Now in the United Kingdom with 14%. Except Sky Now, all services had a share above 37% of EU films. **Table 48, Table 49 and Figure 59**

When it comes to the share of US films, the same differences exist. While the overall share for the 9 services stands at 37%, Sky Now has a share of 77% of US films, followed by SFR Play with 55% and TIMVision in Italy with 49%. The lowest shares of US films are found in the catalogues of Uncut France with 6%, realeyz Germany with 15% and Uncut Belgium with 22%.

On average, 11% of films were of other international origin, with a high of 15% in the catalogue of Uncut Belgium and 14% in the one of realeyz, whereas SFR Play had only a share of 3% and Sky Now 6%.

As it was the case with most types of services, EUR OBS films had an average share of 2%, ranging from 1% in 4 catalogues to 9% in the catalogue of Uncut France.

On the split between national and EU non-national films

The split of EU films into national and EU non-national films shows again differences between services. On average, the catalogues were composed of 28% of EU non-national films and 20% of national films. **Figure 29 and Figure 30**

The highest share of national films can be found in the catalogues of Uncut France with 43%, CanalPlay France with 32% and realeyz with 32%. On the other side, Belgacom's Proximus had a share of national films of 2%, Sky Now of 7% and Uncut Belgium of 12%. But even if their share of national films was lower than the average, both Belgian services were the leaders in EU non-national films, with a share of 60% for Belgacom and 49% for Uncut Belgium. Sky Now with 7%, CanalPlay with 15% and SFR Play with 16% had the lowest shares of EU non-national films.

Matrix 4 shows these differences. Whereas French, German and British and Italian services relied on a higher proportion of national films for their EU 28 film offering, for the Belgian services the input for their EU film offer were more EU non-national films than national films.

On average, 931 films were in the catalogues of the 9 services, with only 35 films in the one of Uncut France (which changes films monthly) to over 1 000 in the catalogues of Uncut Belgium, Sky Now and realeyz and even above 2 000 in the catalogue of Voyo in the Czech Republic.

Table 48 9 National SVOD services – films by region of origin, in numbers

Name of SVOD service - Country	EU non-national	National	EUR OBS	US	Other international	Not identified	Total
Belgacom Proximus TV BE	187	7	4	81	30	1	310
Canal Play FR	133	279	11	385	60	2	870
realeyz DE	519	479	70	221	203	3	1 495
SFR Play FR	33	43	5	114	6	6	207
Sky Now GB	95	98	7	1 022	86	24	1 332
TIMVISION IT	113	87	3	251	40	15	509
Uncut Belgium BE	630	152	34	281	191	-	1 288
Uncut France FR	12	15	3	2	3	-	35
Voyo Czech SVOD CZ	626	489	45	754	290	125	2 329
Total 9 national SVOD services	2 348	1 649	182	3 111	909	176	8 375

Source: European Audiovisual Observatory

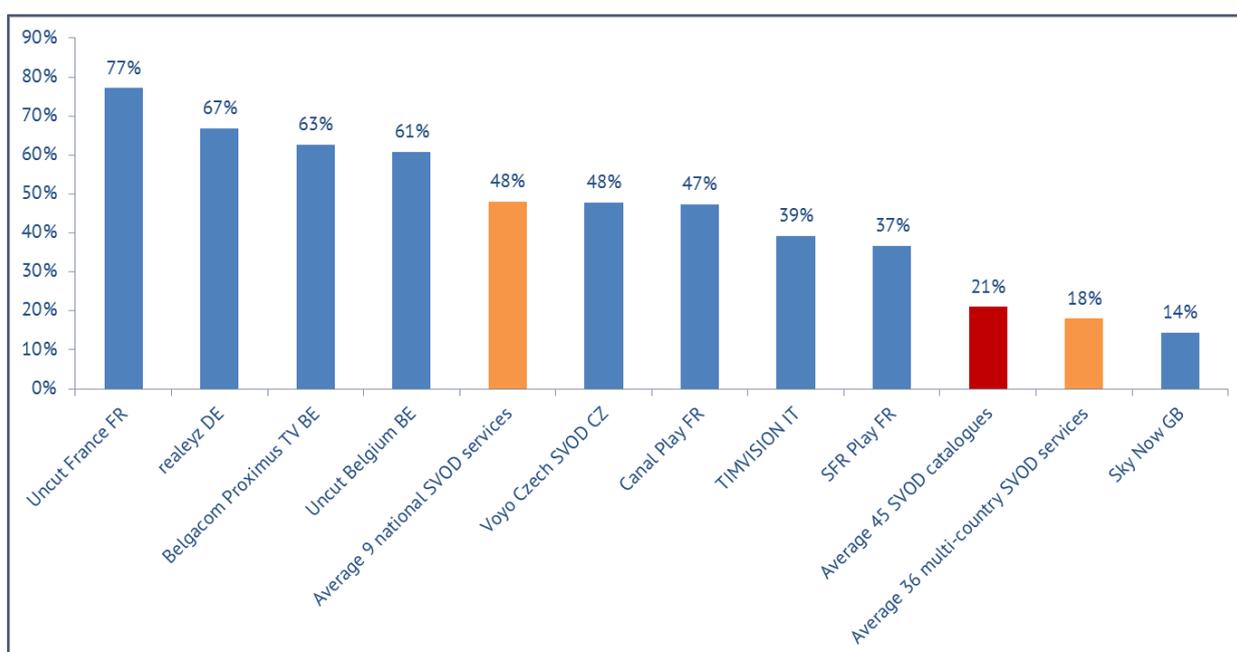
Table 49 9 National SVOD services – films by region of origin, in % of total catalogue

Name of SVOD service - Country	EU non-national	National	EUR OBS	US	Other international	Not identified	Total
Belgacom Proximus TV BE	60%	2%	1%	26%	10%	0%	310
Canal Play FR	15%	32%	1%	44%	7%	0%	870
realeyz DE	35%	32%	5%	15%	14%	0%	1 495
SFR Play FR	16%	21%	2%	55%	3%	3%	207
Sky Now GB	7%	7%	1%	77%	6%	2%	1 332
TIMVISION IT	22%	17%	1%	49%	8%	3%	509
Uncut Belgium BE	49%	12%	3%	22%	15%	0%	1 288
Uncut France FR	34%	43%	9%	6%	9%	0%	35
Voyo Czech SVOD CZ	27%	21%	2%	32%	12%	5%	2 329
Average 9 national SVOD services	28%	20%	2%	37%	11%	2%	8 375

Source: European Audiovisual Observatory

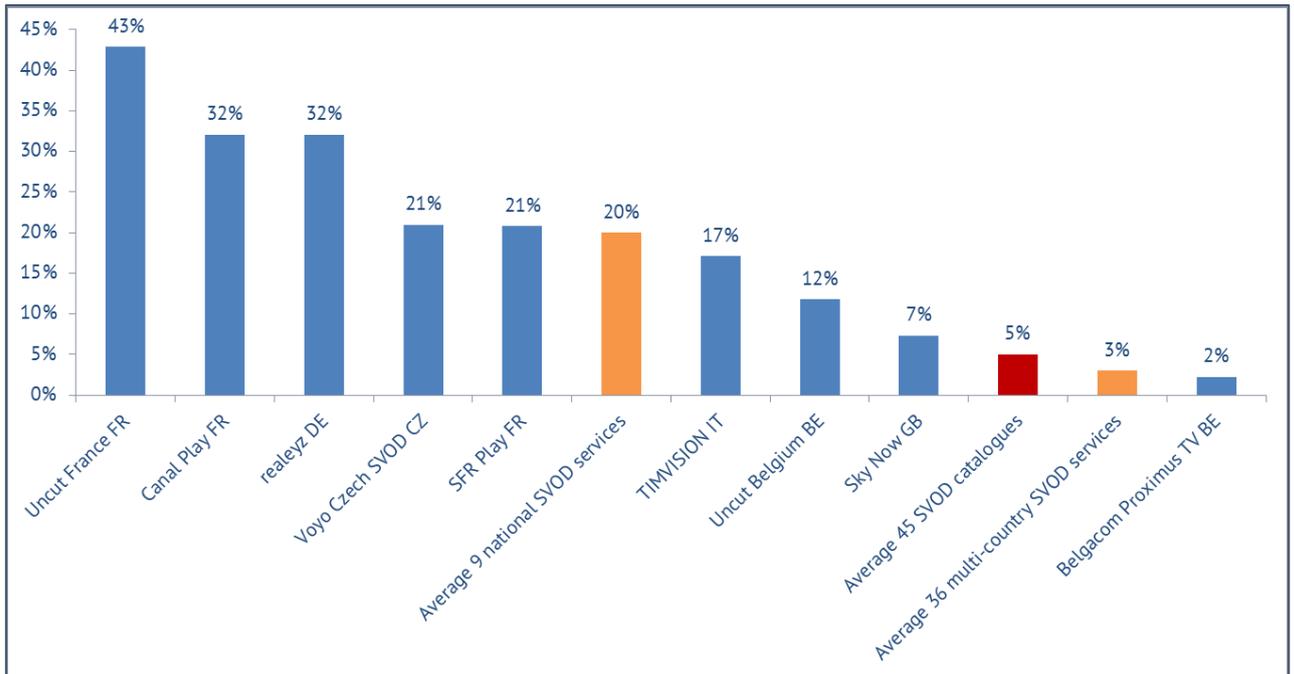
3.2.2.1. Focus on the share of EU 28, national and EU non-national films

Figure 59 9 national SVOD services – Share of EU 28 films



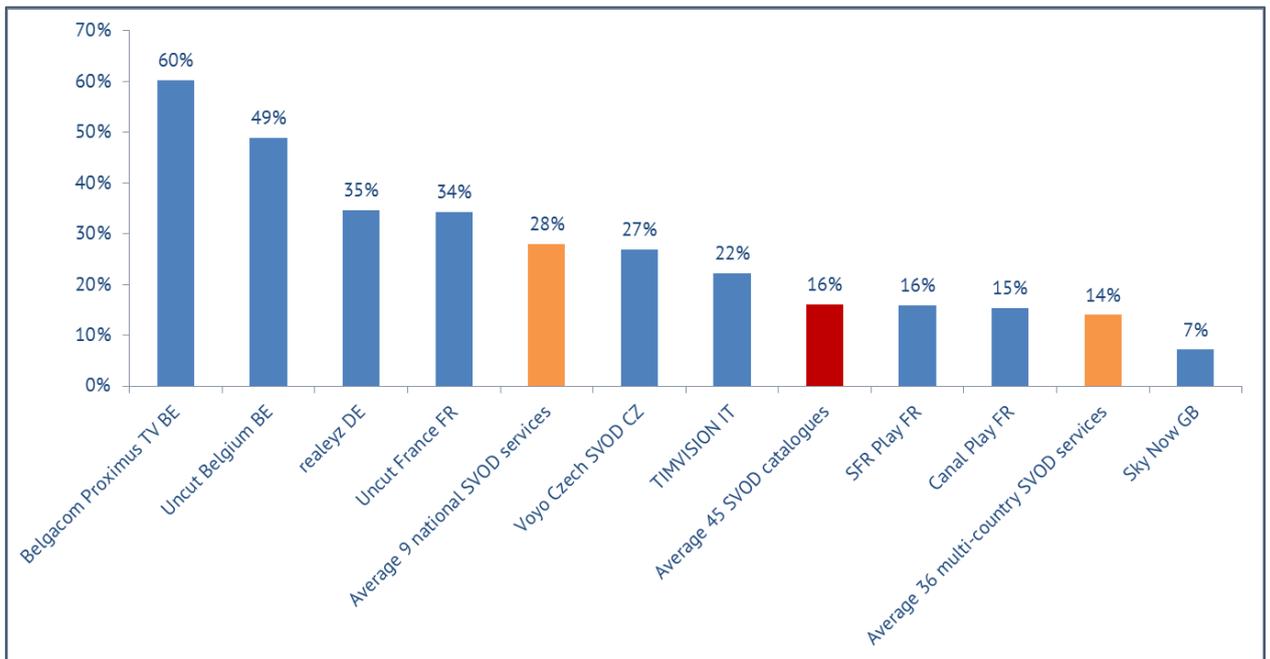
Source: European Audiovisual Observatory

Figure 60 9 national SVOD services – Share of national films



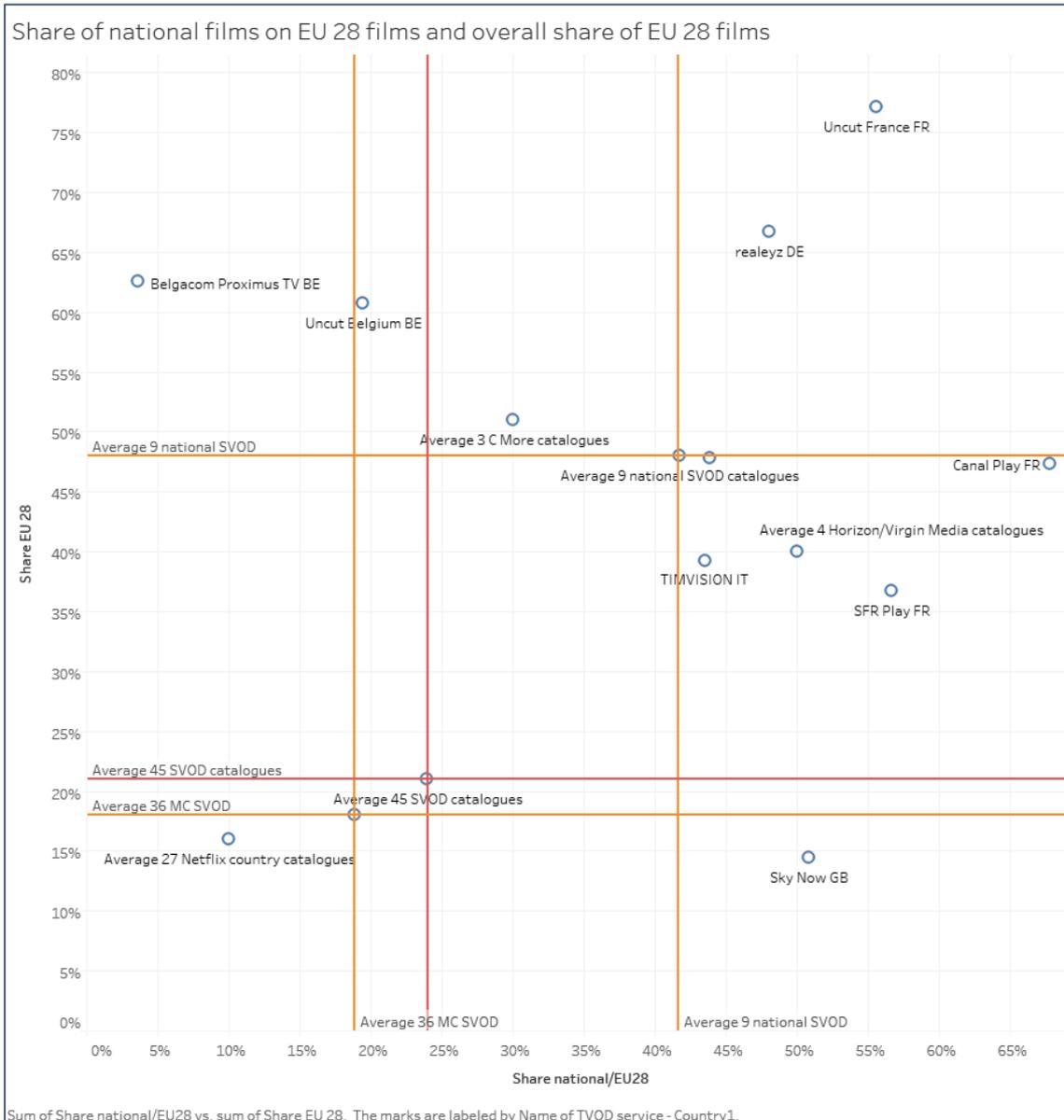
Source: European Audiovisual Observatory

Figure 61 9 national SVOD services – Share of EU non-national films



Source: European Audiovisual Observatory

Matrix 4 9 national SVOD services – Proportion of national films in EU 28 films and share of EU 28 films



Source: European Audiovisual Observatory



3.2.3. 36 Multi-country SVOD services and catalogues

The sample of MCS is heavily impacted by Netflix, with 27 catalogues out of 36, or 75% of all catalogues. Therefore, the figures are provided by averages of MCS, averages without Netflix and Netflix averages. The shares of films by region of origin vary, once again, strongly between services.

Also, caution should be taken as Netflix's country catalogue data are the oldest ones; the last data gathering that was made possible by our IT services was in October 2017. Netflix has changed its catalogues since, including more international production, original content and has also started to produce European original content.

On the overall shares by region of origin of films in the 36 catalogues

On average, 17%-18% of films in the catalogues of MCS were of EU origin, 51% of US origin, 20% of other international origin and 2% of EUR OBS origin. 9% of films were not identified, mostly in the catalogues of Netflix and Amazon which accounted for 90% of not identified films, and the sole Amazon catalogue in the UK accounted for 30% of unidentified films (no information provided by IMDb or LUMIERE). EU non-national films accounted for 14% and national films for 3%.

Table 50 and Table 51

On the shares by region of origin of films in the 9 catalogues of MCS without Netflix' 27 catalogues

When Netflix is excluded, the average share of EU 28 films stands at 29%, with 17% of EU non-national films and 12% of national films. The highest share of EU films was found in the 3 catalogues of C More with 51% (36% EU non-national, 15% national), followed by the 4 catalogues of Horizon/Virgin Media with 40% (a split 20%/20% between national and EU non-national, due mainly to the importance of the German catalogue with 3 122 films of which 24% were national). Amazon Prime UK had a share of 14% of EU films (8% non-national, 6% national) and HBO Go in Bulgaria of 24% (23% non-national, 1% national).

Table 50 and Table 51

US films accounted on average for 37%, with a high in the HBO Go catalogue of 57%, and in the one of Virgin Media with 66%.

Other international films accounted on average for 12%, with 4% in the catalogues of C More and 16% in the one of Amazon Prime in the United Kingdom. EUR OBS films had an average of 2%.

On the average shares by region of origin in the 27 country catalogues of Netflix

Netflix's 27 country catalogues had an average share of EU films comprised between 15%-16%, with EU non-national films representing the bulk of EU films with 14% and 1.5%-2% of national films (or 12.5% of EU films were national). The share of EU films ranges from 12% in 4 catalogues (CZ, LT, SI, HR) to 18%-19% in 5 catalogues (NL, IT, BE, DK, SE). **Table 52 and Table 53**



The largest shares of national films were found in the catalogues in the United Kingdom with 8%, France 6%, Germany 5.4%, Italy 4.5%, Spain 4% and the Netherlands with also 4%. These were naturally the catalogues in which national films took a higher share of EU films, with national films representing 51.6% of EU films in the British catalogue, 34.6% in the French, 32.8% in the German, 25.5% in the Spanish and 24.1% in the Italian catalogue.

14 countries had a share of national films below 0.1% with 10 catalogues carrying no national film.

EU non-national films had the highest shares, between 16% and 18%, in Ireland, Greece, Romania, Sweden, Portugal, Finland and Belgium.

On average, 54% of US films were found in the 27 catalogues, with shares ranging from 43% in Greece to 60% in Finland. Other international films represented 22% on average, from 16% in the Finnish catalogue to 28% in the Greek catalogue. EUR OBS films had a share of 3%.

Overall comparison of 36 multi-country SVOD services on EU films

The highest share of EU films with 54% was found in the catalogues of C More in Sweden and Denmark, the lowest share in the catalogues of Netflix in the Czech Republic, Lithuania, Slovenia and Croatia with 12%. **Figure 62**

The highest share of national films was also found in the Swedish catalogue of C More with 36% (C More is a national service in Sweden) and in the German catalogue of Horizon Go with 24%. HBO Go with 1%, Virgin Media with 0% and 19 Netflix catalogues with less than 1% of national films had the least national films of the MCS. **Figure 63**

Finally, the highest shares of EU non-national films were found in the Danish and Finnish catalogues of C More with respectively 49% and 41%, whereas the lowest shares were found in the British catalogues of Amazon and Netflix with each 8%. **Figure 64**

Matrix 5 shows the proportion of national films in EU films and the overall share of EU films in the catalogues of each service and services averages. The highest share of national films in EU films is found in the catalogues of C More Sweden with 66%, Horizon Go Germany with 55%, Netflix UK with 52% and Amazon UK with 43%; these services rely mostly on national films for their EU film offering. 23 services had a share below 10%; C More Denmark with 9%, Horizon in Poland with 5%, HBO Go with 2%, Virgin Media with no national film and 19 Netflix catalogues. Overall, the 3 C More services had the highest share of EU films, followed by the 3 Horizon Go services.

On average, 2 120 films were in the catalogues, with the highest average being the Netflix catalogues with on average 2 331 films, Amazon UK with over 6 000 titles. Horizon had on average 1 081 titles but with over 3 100 titles in Germany and under 200 in Poland and on Virgin Media with big disparities. C More catalogues were composed on average of 714 films.



Table 50 36 Multi-country SVOD services, Summary of the average shares of films by region of origin, in numbers

Name of SVOD service - Country	EU non-national	National	EUR OBS	US	Other international	Not identified	Total
Amazon GB	485	365	46	2 122	953	2 087	6 058
C More Film DK	361	37	28	284	26	-	736
C More Film Sweden SE	140	266	28	285	28	-	747
C More Play FI	267	29	15	263	27	58	659
HBO Go BG	200	5	15	502	61	95	878
Horizon Go DE	597	741	94	1 058	407	225	3 122
Horizon/UPC CZ	196	126	9	296	78	222	927
Horizon/UPC PL	53	3	1	46	3	61	167
Virgin Media On Demand Film IE	17	-	-	70	11	8	106
Total 9 Multi-country SVOD services (without Netflix)	2 316	1 572	236	4 926	1 594	2 756	13 400
Total 3 C More catalogues	768	332	71	832	81	58	2 142
Total 4 Horizon/Virgin Media catalogues	863	870	104	1 470	499	516	4 322
Total 27 Netflix catalogues	8 627	966	1 589	33 898	13 789	4 055	62 924
Total 36 multi-country catalogues	10 943	2 538	1 825	38 824	15 383	6 811	76 324

Source: European Audiovisual Observatory

Table 51 36 Multi-country SVOD services, Summary of the average shares of films by region of origin, in %

Name of SVOD service - Country	EU non-national	National	EUR OBS	US	Other international	Not identified	Total
Amazon GB	8%	6%	1%	35%	16%	34%	6 058
C More Film DK	49%	5%	4%	39%	4%	0%	736
C More Film Sweden SE	19%	36%	4%	38%	4%	0%	747
C More Play FI	41%	4%	2%	40%	4%	9%	659
HBO Go BG	23%	1%	2%	57%	7%	11%	878
Horizon Go DE	19%	24%	3%	34%	13%	7%	3 122
Horizon/UPC CZ	21%	14%	1%	32%	8%	24%	927
Horizon/UPC PL	32%	2%	1%	28%	2%	37%	167
Virgin Media On Demand Film IE	16%	0%	0%	66%	10%	8%	106
Average 9 Multi-country SVOD services (without Netflix)	17%	12%	2%	37%	12%	21%	1 489
Average 3 C More catalogues	36%	15%	3%	39%	4%	3%	714
Average 4 Horizon/Virgin Media catalogues	20%	20%	2%	34%	12%	12%	1 081
Average 27 Netflix catalogues	14%	2%	3%	54%	22%	6%	2 331
Average 36 multi-country catalogues	14%	3%	2%	51%	20%	9%	2 120

Source: European Audiovisual Observatory



Table 52 27 Netflix catalogues – region of origin of films, in numbers

Name of SVOD service - Country	EU non-national	National	EUR OBS	US	Other international	Not identified	Total
Netflix AT	317	3	53	1 175	383	132	2 063
Netflix BE	442	7	55	1 365	459	149	2 477
Netflix BG	284	-	56	1 123	532	164	2 159
Netflix CY	263	-	58	1 094	514	157	2 086
Netflix CZ	296	-	57	1 218	638	167	2 376
Netflix DE	236	115	52	1 193	399	143	2 138
Netflix DK	336	81	71	1 344	389	101	2 322
Netflix EE	280	1	57	1 137	531	166	2 172
Netflix ES	257	88	54	1 228	447	101	2 175
Netflix FI	413	5	71	1 503	396	101	2 489
Netflix FR	255	135	55	1 190	489	137	2 261
Netflix GB	262	279	66	1 774	802	217	3 400
Netflix GR	211	-	55	574	374	124	1 338
Netflix HR	259	1	56	1 115	528	162	2 121
Netflix HU	279	-	56	1 116	529	162	2 142
Netflix IE	509	14	64	1 768	693	210	3 258
Netflix IT	325	103	56	1 252	424	104	2 264
Netflix LT	297	-	58	1 220	642	170	2 387
Netflix LV	281	-	57	1 137	532	166	2 173
Netflix MT	391	-	60	1 314	633	189	2 587
Netflix NL	316	83	57	1 129	402	111	2 098
Netflix PL	261	7	54	1 222	394	127	2 065
Netflix PT	406	2	56	1 354	501	152	2 471
Netflix RO	528	-	65	1 767	695	209	3 264
Netflix SE	383	41	78	1 348	405	107	2 362
Netflix SI	261	-	56	1 115	528	165	2 125
Netflix SK	279	1	56	1 123	530	162	2 151
Total 27 Netflix country catalogues	8 627	966	1 589	33 898	13 789	4 055	62 924

Source: European Audiovisual Observatory

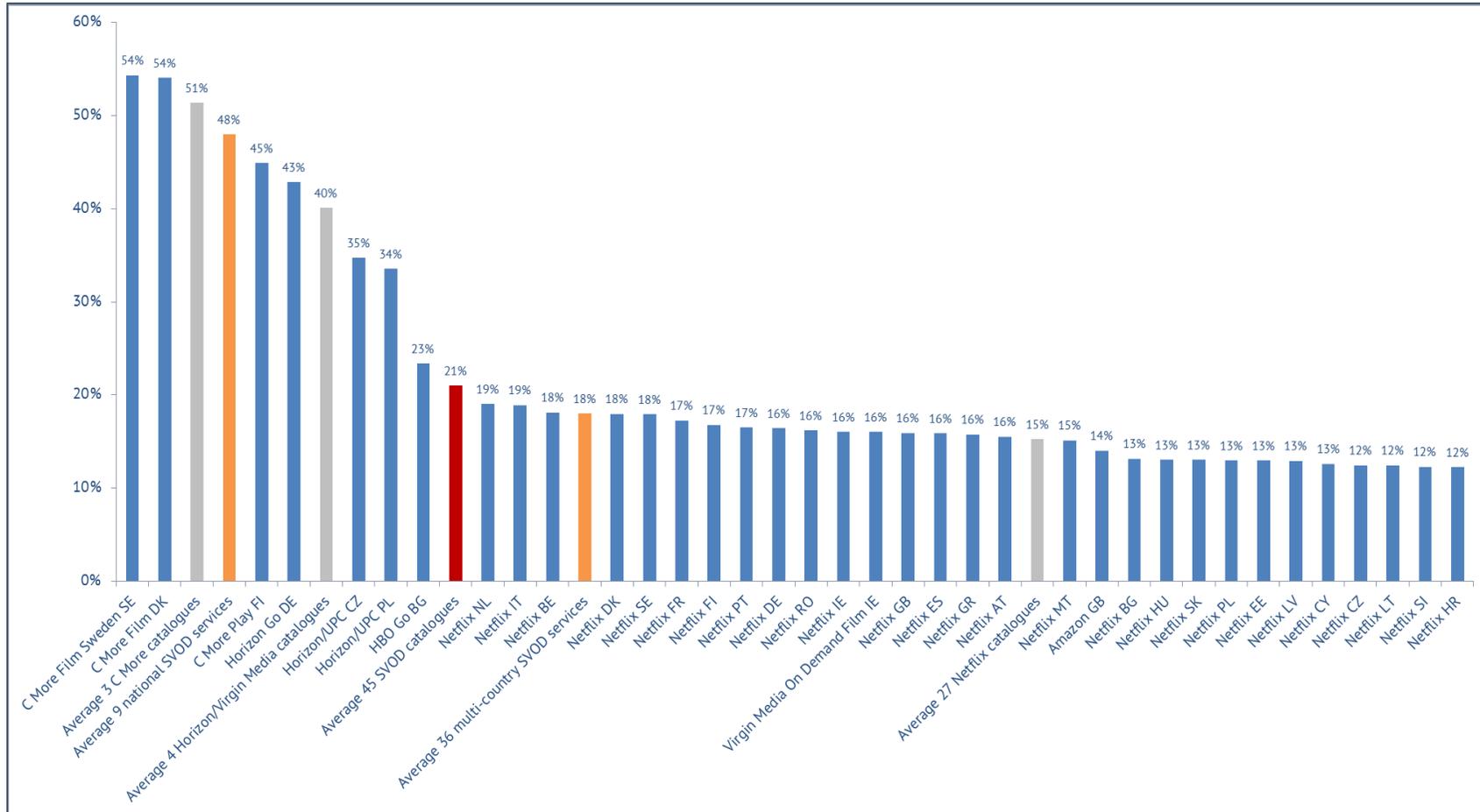
Table 53 27 Netflix catalogues – region of origin of films, in %

Name of SVOD service - Country	EU non-national	National	EUR OBS	US	Other international	Not identified	Total
Netflix AT	15%	0%	3%	57%	19%	6%	2 063
Netflix BE	18%	0%	2%	55%	19%	6%	2 477
Netflix BG	13%	0%	3%	52%	25%	8%	2 159
Netflix CY	13%	0%	3%	52%	25%	8%	2 086
Netflix CZ	12%	0%	2%	51%	27%	7%	2 376
Netflix DE	11%	5%	2%	56%	19%	7%	2 138
Netflix DK	14%	3%	3%	58%	17%	4%	2 322
Netflix EE	13%	0%	3%	52%	24%	8%	2 172
Netflix ES	12%	4%	2%	56%	21%	5%	2 175
Netflix FI	17%	0%	3%	60%	16%	4%	2 489
Netflix FR	11%	6%	2%	53%	22%	6%	2 261
Netflix GB	8%	8%	2%	52%	24%	6%	3 400
Netflix GR	16%	0%	4%	43%	28%	9%	1 338
Netflix HR	12%	0%	3%	53%	25%	8%	2 121
Netflix HU	13%	0%	3%	52%	25%	8%	2 142
Netflix IE	16%	0%	2%	54%	21%	6%	3 258
Netflix IT	14%	5%	2%	55%	19%	5%	2 264
Netflix LT	12%	0%	2%	51%	27%	7%	2 387
Netflix LV	13%	0%	3%	52%	24%	8%	2 173
Netflix MT	15%	0%	2%	51%	24%	7%	2 587
Netflix NL	15%	4%	3%	54%	19%	5%	2 098
Netflix PL	13%	0%	3%	59%	19%	6%	2 065
Netflix PT	16%	0%	2%	55%	20%	6%	2 471
Netflix RO	16%	0%	2%	54%	21%	6%	3 264
Netflix SE	16%	2%	3%	57%	17%	5%	2 362
Netflix SI	12%	0%	3%	52%	25%	8%	2 125
Netflix SK	13%	0%	3%	52%	25%	8%	2 151
Average 27 Netflix country catalogues	14%	2%	3%	54%	22%	6%	2 331

Source: European Audiovisual Observatory

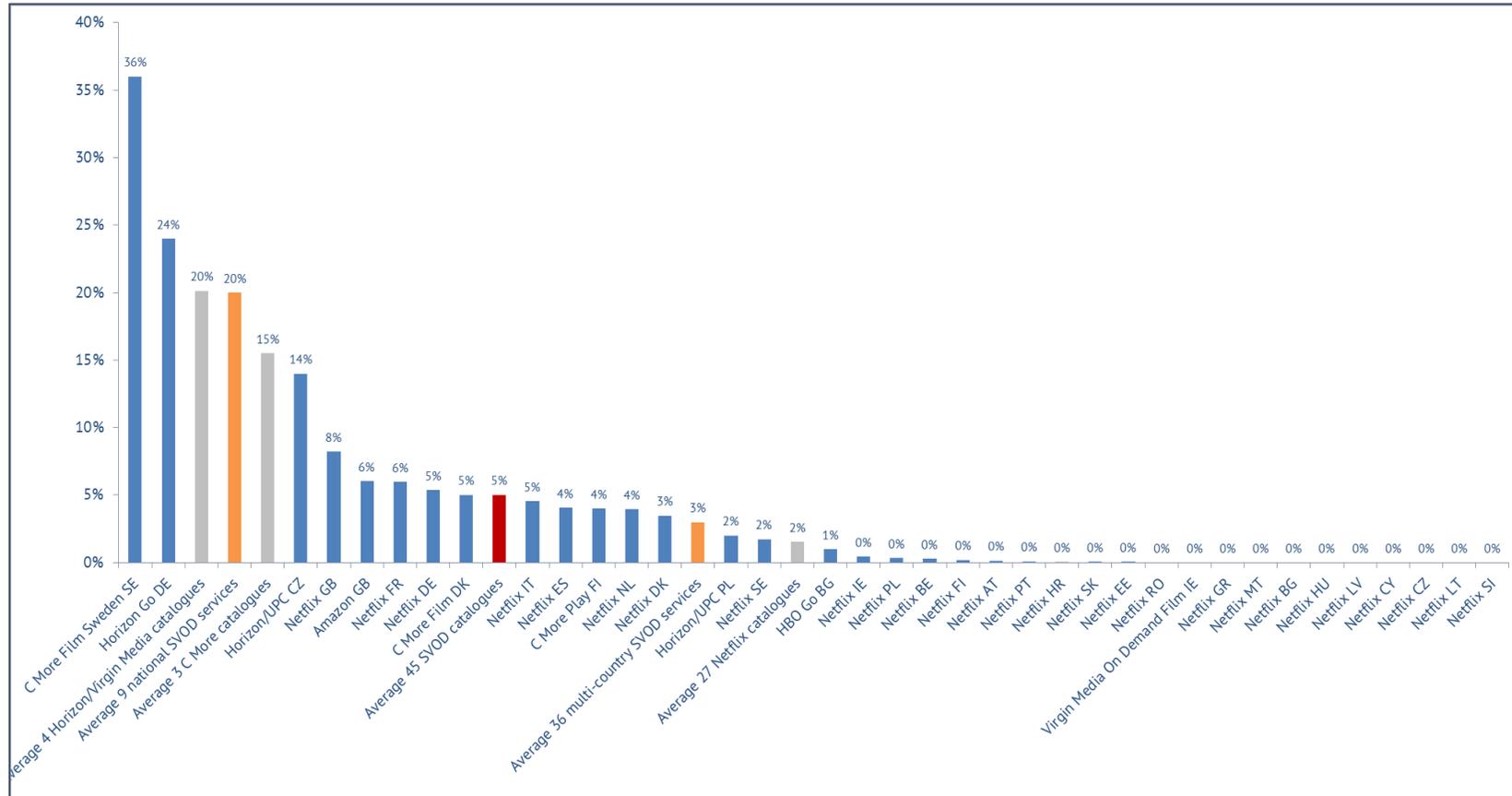
3.2.3.1. Focus on the share of EU 28, national and EU non-national films

Figure 62 Share of EU 28 films in 36 multi-country SVOD services



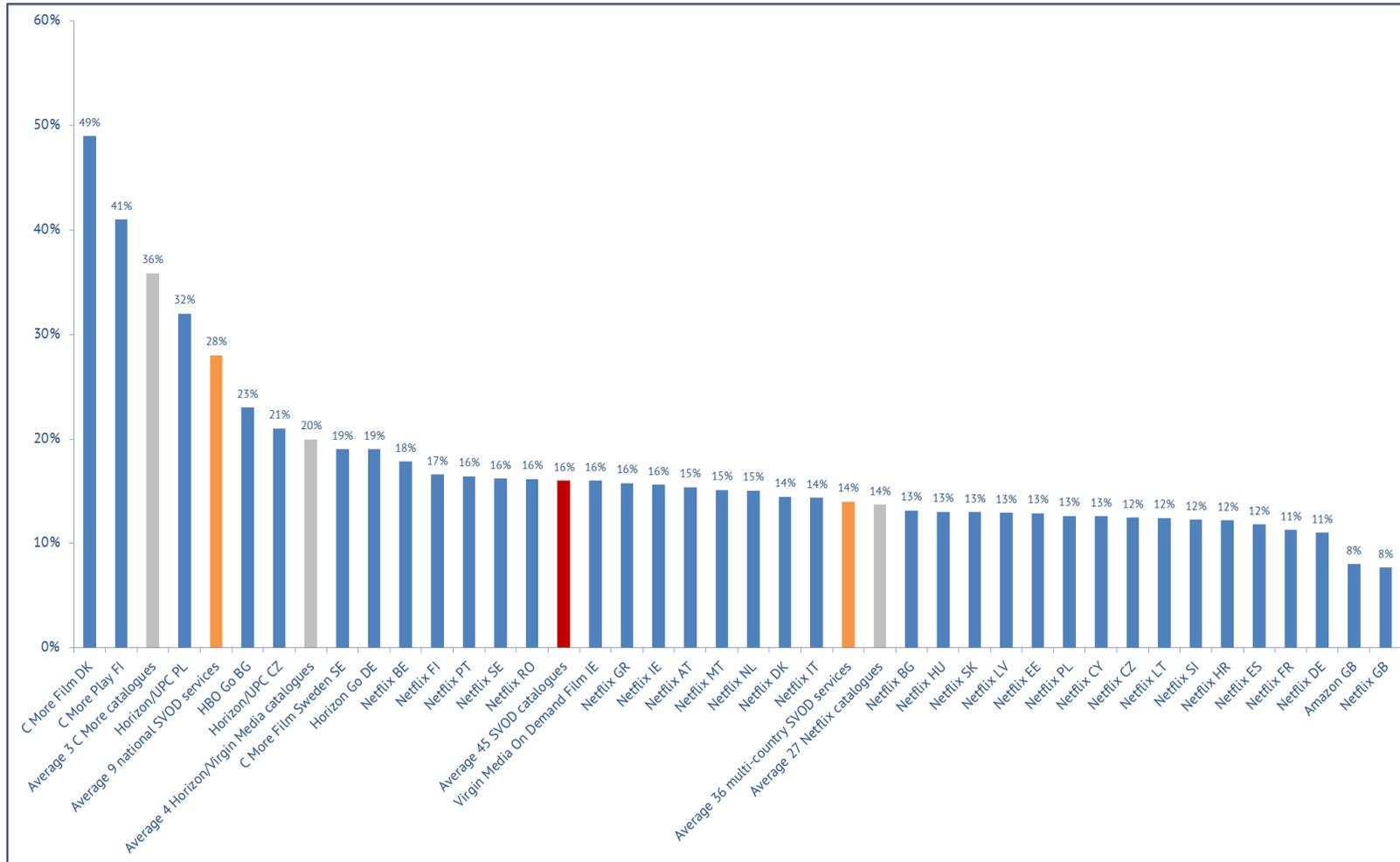
Source: European Audiovisual Observatory

Figure 63 Share of national films in 36 multi-country SVOD services



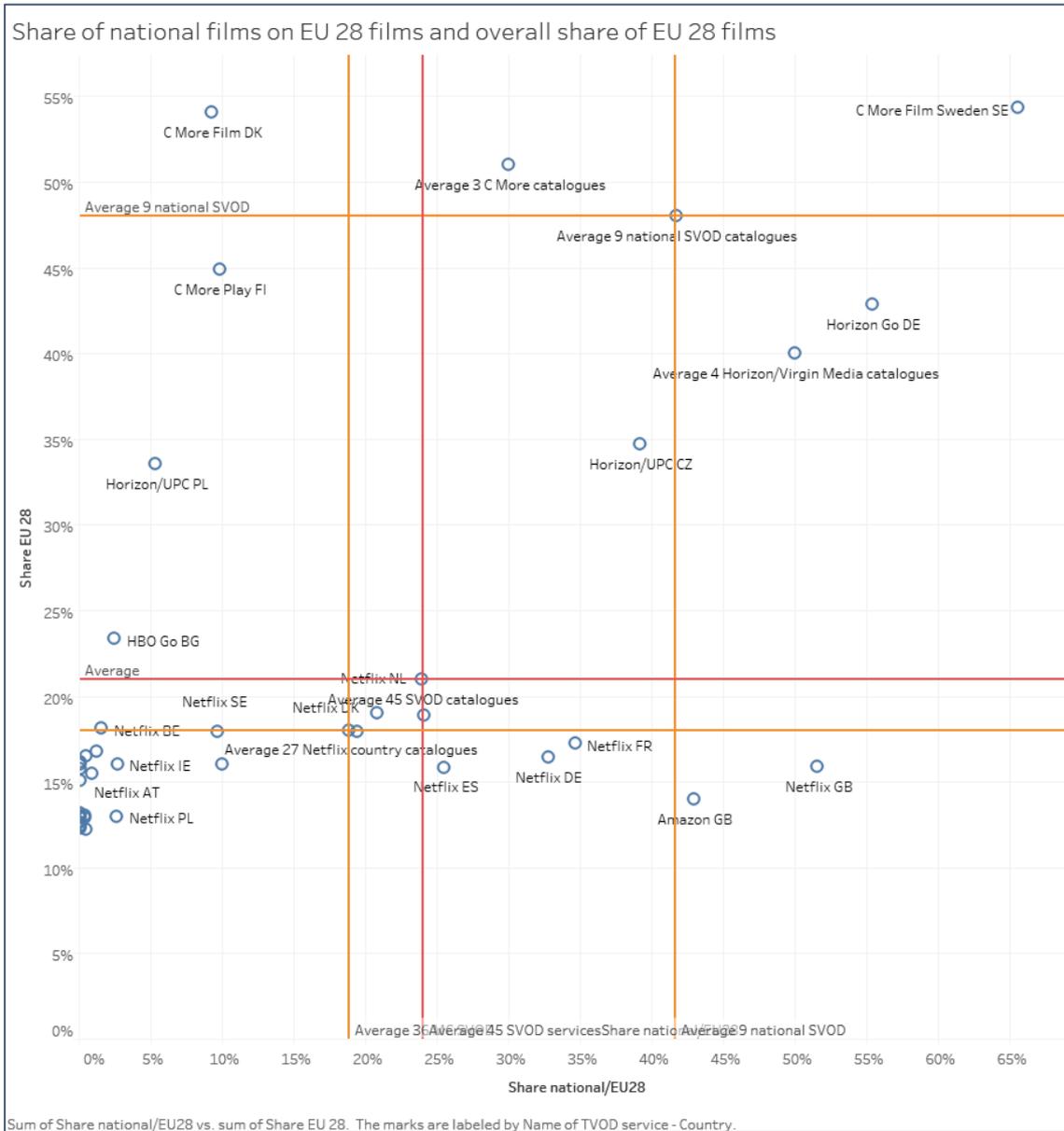
Source: European Audiovisual Observatory

Figure 64 Share of EU non-national films in 36 multi-country SVOD services



Source: European Audiovisual Observatory

Matrix 5 36 multi-country SVOD catalogues – Proportion of national films in EU 28 films and share of EU 28 films



Source: European Audiovisual Observatory



3.2.4. Diversity or Concentration – the number of different production countries by services

On the most represented production countries in the catalogues

14 countries of production accounted for at least 5% of films in the 45 SVOD catalogues, with US films accounting over 5% in each of 45 catalogues, followed by British films which had at least a share of 5% in 43 catalogues. Indian films had a share of 5% in 24 catalogues, followed by French films which were above 5% in 10 catalogues. 10 other countries crossed the 5%-mark, but 5 (Austria, Belgium, Denmark, Portugal and Turkey) in only 1 catalogue each. **Table 54**

The number of different production countries falls rapidly when the minimum share of films is raised. At 10%, they are still 10 different production countries (with US films having this share in 44 catalogues, Indian films in 11 and French films in 6), at the 20%-mark there are still 5 production countries, at the 30%-mark 4 (US in 41 catalogues, French films in 3, Swedish films in 2 and German films in one catalogue). Finally at the 40%-mark there are still 37 catalogues which have at least 40% of US films and 2 which have this percentage for French films and at the 50%-mark only US films are still present, in 32 catalogues. **Figure 65**

On the number of different production countries

On average, the 45 SVOD catalogues have 54 different production countries of films in their catalogues, with the 9 national services having on average 40 different production countries and the 36 MCS 57 different countries. **Figure 66**

The catalogue which had films of the most different production countries was Amazon Prime in the United Kingdom with 80 countries, followed by the British catalogue of Netflix with 74 different countries. The Netflix average was the highest, with on average 64 different production countries for the films in Netflix catalogues. C More had a lower average with 23 different production countries. Virgin Media (10 countries), Uncut France (12), Horizon in Poland (15) and SFR Play (20) had the least different number of production countries.

Concentration of the top 3 production countries in the catalogues

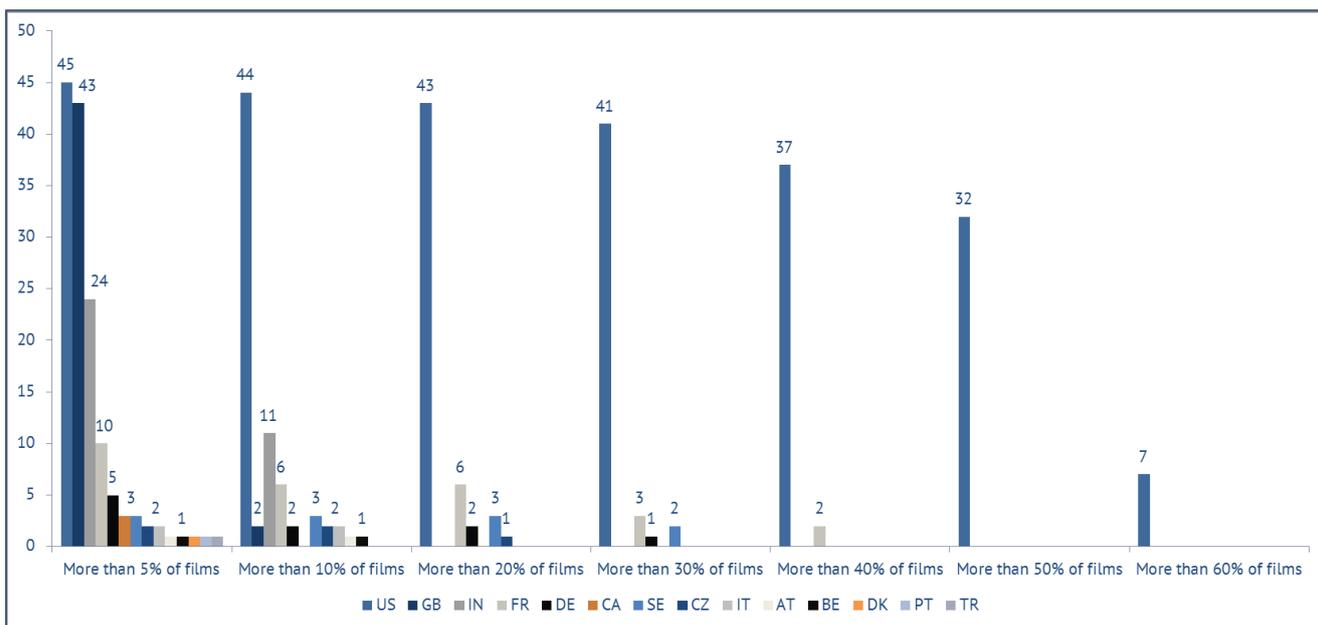
As it was the case with the sample of TVOD services, the catalogues remain however concentrated. On average, the top 3 production countries represented 68% of all films in the catalogues, with the highest concentration being found in the catalogues of Virgin Media (91%), Sky Now (88%), SFR Play (85%), C More Sweden (83%), Canal Play (81%) and C More Denmark (81%). 6 catalogues had a share of the top 3 production countries below the general average; Horizon Go in Germany (67%), Netflix in Greece (67%), Voyo (64%), Uncut France (60%) and Belgium (58%) and realeyz (59%). **Figure 67**

Table 54 SVOD – Percentile of shares of films present in catalogues, by count of country of origin

Country of production	More than 5% of films	More than 10% of films	More than 20% of films	More than 30% of films	More than 40% of films	More than 50% of films	More than 60% of films
US	45	44	43	41	37	32	7
GB	43	2					
IN	24	11					
FR	10	6	6	3	2		
DE	5	2	2	1			
CA	3						
SE	3	3	3	2			
CZ	2	2	1				
IT	2	2					
AT	1	1					
BE	1	1					
DK	1						
PT	1						
TR	1						
Total countries of production	14	10	5	4	2	1	1
Total SVOD services out of 45	45	45	45	44	39	32	7

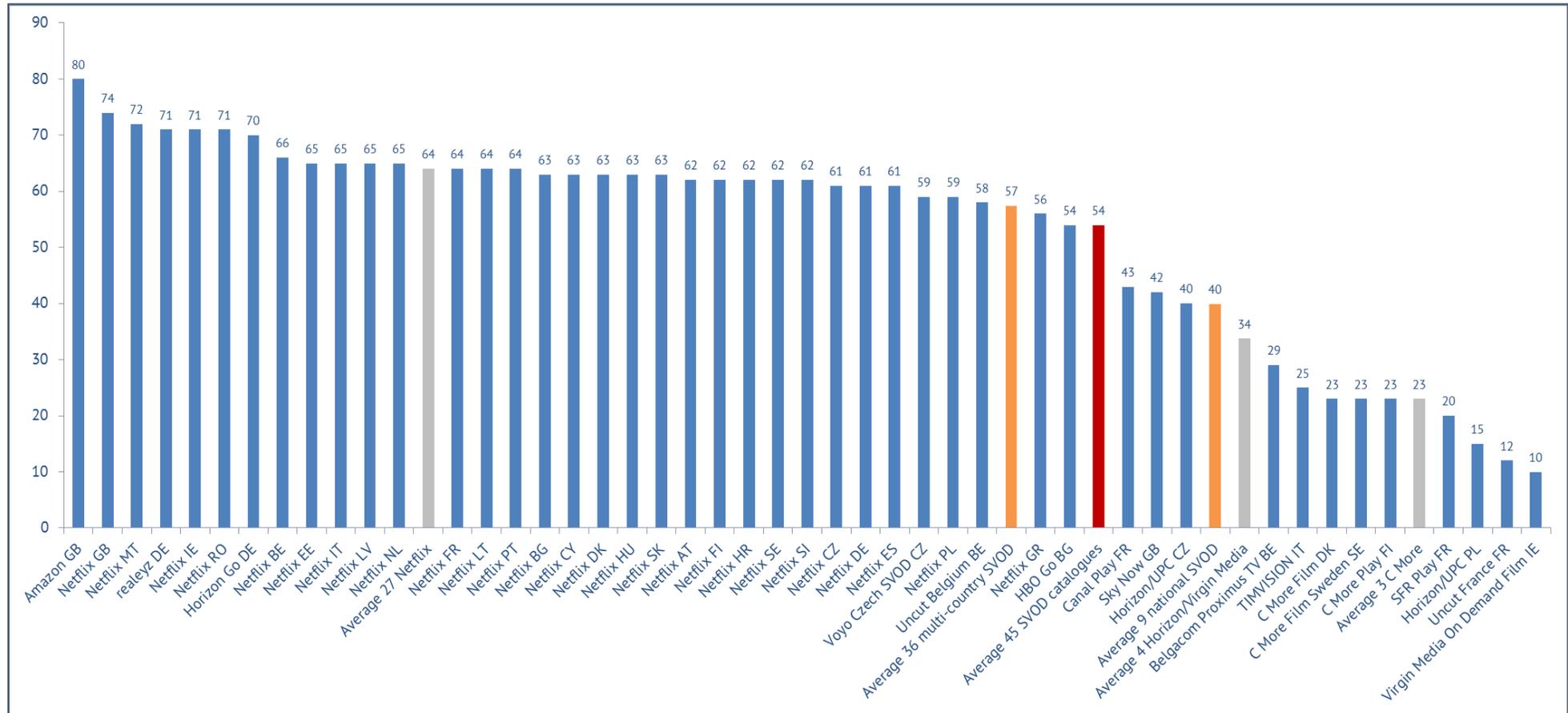
Source: European Audiovisual Observatory

Figure 65 Number of SVOD services carrying films of a specific production country in function of the share in the catalogue, in numbers of SVOD services and percentile of films in catalogues



Source: European Audiovisual Observatory

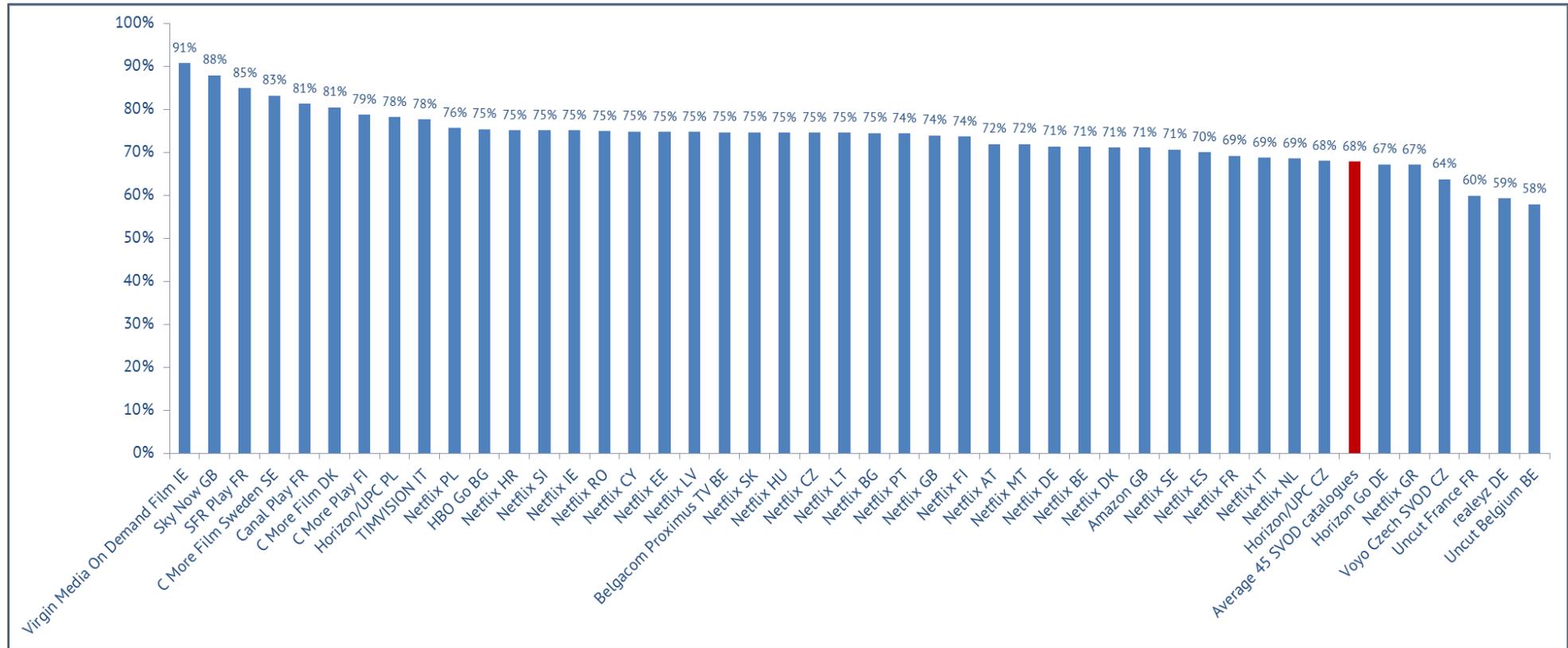
Figure 66 Number of different countries of production by SVOD catalogue, in numbers



Source: European Audiovisual Observatory



Figure 67 Share of top 3 production countries by catalogue, in percentages of total identified



Source: European Audiovisual Observatory

3.3. The circulation of unique film titles

On this statistic

The figure of circulation for unique film titles, in countries (maximum of 27 EU countries) and on SVOD services, aims to show how titles circulate between countries and on SVOD services in order to differentiate the potential of circulation of film titles by their region of origin and also to show why even if they accounted for more than 32% of unique film titles, EU films only made 21% of all films available on SVOD services. US films, accounting for 38% of all titles available, represented a share of 50% of all films available and other international film titles, accounting for 14% of unique titles, represented 19% of all films in the SVOD catalogues.

Due to a reduced sample size and several countries having only 1 SVOD catalogue present in the sample, the average country circulation is almost similar to service circulation.

Country and service circulation by region of origin

EU unique titles circulated on average in 2.3 countries (and 2.4 services), US film titles in 4.8 countries (and 4.9 services), other international titles in 5.1 countries (and 5.2 services) and EUR OBS titles in 4.8 countries and services. The whole average for all titles on SVOD services is a country and service circulation of 3.7.

Table 55, Figure 68 and Figure 69

73% of EU unique titles were only available in 1 country; the same was the case for 51% of US titles, 64% of other international titles and 65.5% of EUR OBS titles. (Service availability was almost the same) **Table 59** and **Table 61**

Table 56 and **Table 57** give the circulation in countries and on services in percentiles by the region of origin. Whereas 90% of unique EU titles were available in less than 4 countries (and services), this was the case for US titles in less than 14 countries (and 16 services), for other international titles in less than 21 countries (and 22 services) and for EUR OBS titles in less than 26 countries (and 27 services).

The country and service circulation of film titles is heavily influenced by their presence, or not, in all of the 27 Netflix catalogues; 80 EU titles were present in 27 countries, 49 EUR OBS titles, 413 US titles and 242 other international titles. These are titles for which Netflix has acquired the rights of distribution in all of its countries catalogues.

Of the 80 EU titles present in 27 countries on SVOD, 29 were of UK origin, 16 were of German origin, 12 of Spanish, 4 of Dutch and Irish, 3 of French and Italian, 2 of Austrian and Belgian, and completed by one Swedish title, one Danish, one Finnish, one Portuguese and one of Croatian origin.

Only 3 titles were present on the maximum number of 29 SVOD catalogues; *Eega* (2012, India), *Sharknado3: Oh Hell No!* (2015, US) and *Results* (2015, US).

On country (and service) circulation by country of production



Table 62 gives the top 20 list of production countries of film titles and their average country and service circulation. Spanish titles, while only representing 1.4% of identified film titles, were the EU titles which circulated the best in countries with an average of 4.9 and on SVOD services, with 4.95 services on average. The best circulation among the 20 biggest film title production countries are achieved by India (8 countries and services on average), South Korea (5.5 countries and services), and China (5 countries and services). Their presence in several Netflix catalogues enhanced their circulation. 8 EU countries, present in the top 20 film title production list, had the smallest circulation of their titles in countries and on services; Sweden, Denmark, France, Germany (the second biggest producer in this top list, after the US), Italy, Belgium, Austria and the Czech Republic. British film titles ranked just behind US titles with an average circulation of 3.9 countries and services (US Titles were at 4.8 countries and 4.9 services). On average, the titles from the 20 biggest film title production countries circulated in 3.9 countries and services.

In **Table 63**, the circulation of all EU and EUROBS titles found in the SVOD catalogues can be seen. The titles which circulated the best were produced in Turkey (16.7 countries and 16.9 services on average, again a Netflix effect of a large presence in several catalogues), Portuguese (with only 9 titles, but on average in 5.6 countries and services), Slovenian (only 4 titles in 5.5 countries and services) and Spanish (281 titles with a presence on average in 4.9 countries and services). On average, the titles produced in the 31 EU and EUR OBS countries circulated in 2.5 countries and services.

Finally, **Table 64** gives the top 20 list of film title production countries (with at least 50 titles) with the highest circulation. Here, the top 4 countries were also ranked in the top 20 list of films found on SVOD services but were no longer ranked in the top 20 list of unique film titles because the number of their unique titles is relatively small – the high circulation of these titles increased the volume of films found. Turkey with 78 titles in 16.7 countries leads this list, followed by Brazil with 64 titles present on average in 12.5 countries, Argentina with 72 titles found in 10.7 countries, Mexico with 91 titles in 8.8 countries. The fact that these titles were found in several Netflix country catalogues increased their circulation and therefore the volume of films. 4 EU countries are also in this top list, Spain, the United Kingdom, Ireland (84 titles on average in 3.2 countries) and the Netherlands (178 titles in 2.8 countries). The other EUROBS country in the list is Norway with 108 titles present on average in 2.6 countries.

All film titles of this best circulating list made up 68% of total unique film titles, with an average circulation in 4.9 countries and services. The impact of Netflix carrying these titles in several of its 27 country catalogues and the presence of 13 international production countries (+US) shows the increasing focus on international productions by the SVOD giant.

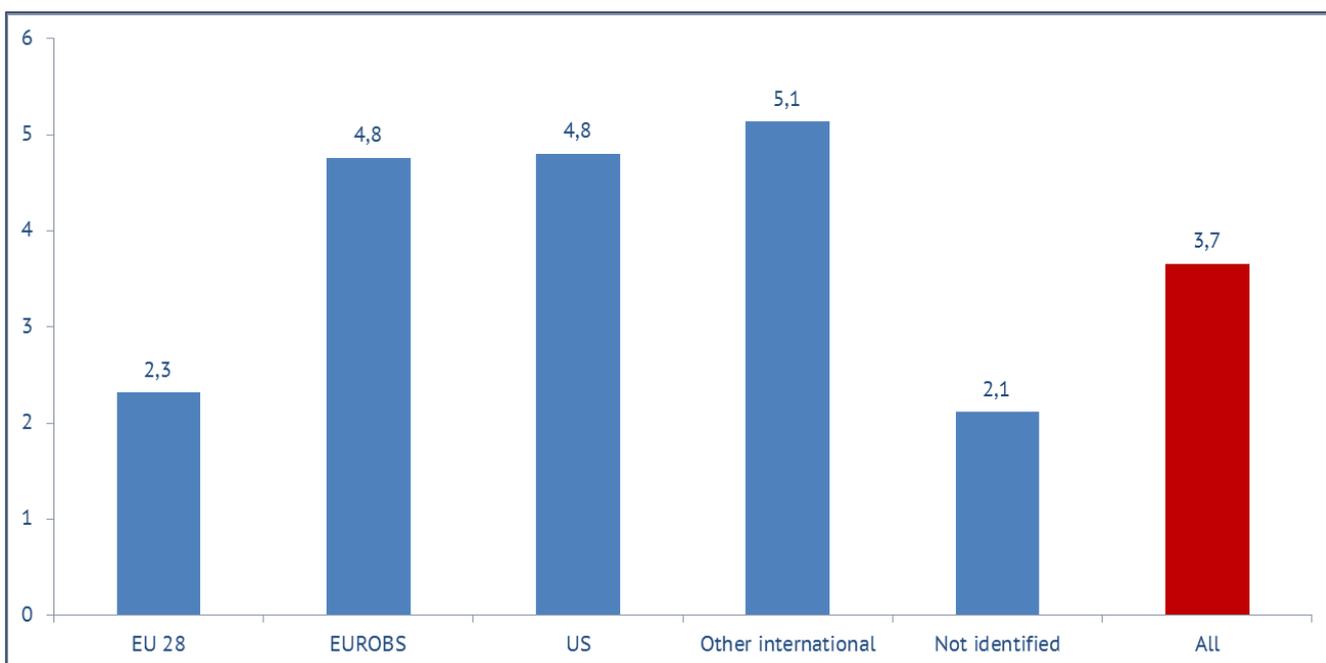


Table 55 Average country and SVOD service circulation of unique film titles by region of origin

	EU 28	EUROBS	US	Other international	Not identified	All
Film titles	7 349	417	8 564	3 148	3 303	22 781
Average country circulation	2,3	4,8	4,8	5,1	2,1	3,7
Average SVOD service circulation	2,4	4,8	4,9	5,2	2,1	3,7

Source: European Audiovisual Observatory

Figure 68 Average country circulation of unique film titles by region of origin



Source: European Audiovisual Observatory

Table 56 Country circulation of unique film titles per percentile by region of origin, in number of countries

	EU 28	EUR OBS	US	Other international	All film titles
90% of titles in less than	4 countries	26 countries	14 countries	21 countries	10 countries
80% of titles in less than	2 countries	3 countries	6 countries	5 countries	3 countries
60% of titles in less than	2 countries	2 countries	3 countries	2 countries	2 countries

Source: European Audiovisual Observatory

Figure 69 Average presence on SVOD services of film titles by region of origin, in number of services



Source: European Audiovisual Observatory

Table 57 SVOD service circulation of unique film titles per percentile by region of origin, in number of countries

	EU 28	EUR OBS	US	Other international	All film titles
90% of titles in less than	4 services	27 services	16 services	22 services	10 services
80% of titles in less than	2 services	3 services	6 services	6 services	3 services
60% of titles in less than	2 services	2 services	3 services	2 services	2 services

Source: European Audiovisual Observatory

3.3.1. Circulation of film titles in 27 EU Member States on SVOD services by region of origin

Table 58 SVOD - Countries of circulation of film titles by region of origin, in number of unique film titles

Number of countries	EU 28	EUR OBS	US	Other international	Not identified	Total
1	5 354	273	4 386	2 019	2 976	15 008
2	789	39	803	181	73	1 885
3	463	27	690	160	15	1 355
4	186	11	573	110	28	908
5	108	5	291	46	22	472
6	63	2	183	32	8	288
7	31	2	134	19	8	194
8	19	2	110	11	2	144
9	27	-	107	18	9	161
10	12	-	66	7	1	86
11	10	-	61	4	8	83
12	13	-	64	6	5	88
13	5	-	56	6	2	69
14	16	-	97	65	10	188
15	23	2	101	57	18	201
16	19	3	81	15	24	142
17	12	-	58	22	5	97
18	9	1	54	18	2	84
19	7	-	34	16	3	60
20	4	-	32	7	1	44
21	13	-	28	6	-	47
22	13	-	24	15	-	52
23	13	1	19	5	-	38
24	18	-	18	9	2	47
25	17	-	34	19	5	75
26	25	-	47	33	9	114
27	80	49	413	242	67	851
Total film titles	7 349	417	8 564	3 148	3 303	22 781

Source: European Audiovisual Observatory



Table 59 SVOD - Countries of circulation of film titles by region of origin, in percentages of total titles

Number of countries	EU 28	EUR OBS	US	Other international	Not identified	Total
1	72,9%	65,5%	51,2%	64,1%	90,1%	65,9%
2	10,7%	9,4%	9,4%	5,7%	2,2%	8,3%
3	6,3%	6,5%	8,1%	5,1%	0,5%	5,9%
4	2,5%	2,6%	6,7%	3,5%	0,8%	4,0%
5	1,5%	1,2%	3,4%	1,5%	0,7%	2,1%
6	0,9%	0,5%	2,1%	1,0%	0,2%	1,3%
7	0,4%	0,5%	1,6%	0,6%	0,2%	0,9%
8	0,3%	0,5%	1,3%	0,3%	0,1%	0,6%
9	0,4%	0,0%	1,2%	0,6%	0,3%	0,7%
10	0,2%	0,0%	0,8%	0,2%	0,0%	0,4%
11	0,1%	0,0%	0,7%	0,1%	0,2%	0,4%
12	0,2%	0,0%	0,7%	0,2%	0,2%	0,4%
13	0,1%	0,0%	0,7%	0,2%	0,1%	0,3%
14	0,2%	0,0%	1,1%	2,1%	0,3%	0,8%
15	0,3%	0,5%	1,2%	1,8%	0,5%	0,9%
16	0,3%	0,7%	0,9%	0,5%	0,7%	0,6%
17	0,2%	0,0%	0,7%	0,7%	0,2%	0,4%
18	0,1%	0,2%	0,6%	0,6%	0,1%	0,4%
19	0,1%	0,0%	0,4%	0,5%	0,1%	0,3%
20	0,1%	0,0%	0,4%	0,2%	0,0%	0,2%
21	0,2%	0,0%	0,3%	0,2%	0,0%	0,2%
22	0,2%	0,0%	0,3%	0,5%	0,0%	0,2%
23	0,2%	0,2%	0,2%	0,2%	0,0%	0,2%
24	0,2%	0,0%	0,2%	0,3%	0,1%	0,2%
25	0,2%	0,0%	0,4%	0,6%	0,2%	0,3%
26	0,3%	0,0%	0,5%	1,0%	0,3%	0,5%
27	1,1%	11,8%	4,8%	7,7%	2,0%	3,7%
Total film titles	7 349	417	8 564	3 148	3 303	22 781

Source: European Audiovisual Observatory

3.3.2. Circulation of film titles in 45 SVOD catalogues by region of origin

Table 60 Number of SVOD services per film title in function of region of origin, in number of titles

Number of services	EU 28	EUR OBS	US	Other international	Not identified	Total
1	5 176	270	4 307	1 993	2 976	14 722
2	875	40	823	188	69	1 995
3	514	27	690	166	19	1 416
4	203	11	546	117	28	905
5	106	7	313	46	21	493
6	72	2	196	33	9	312
7	34	1	144	23	8	210
8	28	2	124	9	2	165
9	25	1	103	18	9	156
10	11	-	75	8	1	95
11	15	-	63	4	8	90
12	13	-	66	5	5	89
13	7	-	57	9	2	75
14	15	-	92	65	10	182
15	23	2	112	55	18	210
16	20	3	79	17	24	143
17	12	-	47	18	5	82
18	8	1	63	20	2	94
19	8	-	33	17	3	61
20	5	-	34	8	1	48
21	13	-	32	5	-	50
22	12	-	26	15	-	53
23	13	1	16	4	-	34
24	18	-	23	10	2	53
25	17	-	34	19	5	75
26	24	-	45	33	9	111
27	73	38	401	239	67	818
28	9	11	18	3	-	41
29	-	-	2	1	-	3
Total film titles	7 349	417	8 564	3 148	3 303	22 781

Source: European Audiovisual Observatory



Table 61 Number of SVOD services per film title in function of region of origin, in percentages of total titles

Number of services	EU 28	EUR OBS	US	Other international	Not identified	Total
1	70,4%	64,7%	50,3%	63,3%	90,1%	64,6%
2	11,9%	9,6%	9,6%	6,0%	2,1%	8,8%
3	7,0%	6,5%	8,1%	5,3%	0,6%	6,2%
4	2,8%	2,6%	6,4%	3,7%	0,8%	4,0%
5	1,4%	1,7%	3,7%	1,5%	0,6%	2,2%
6	1,0%	0,5%	2,3%	1,0%	0,3%	1,4%
7	0,5%	0,2%	1,7%	0,7%	0,2%	0,9%
8	0,4%	0,5%	1,4%	0,3%	0,1%	0,7%
9	0,3%	0,2%	1,2%	0,6%	0,3%	0,7%
10	0,1%	0,0%	0,9%	0,3%	0,0%	0,4%
11	0,2%	0,0%	0,7%	0,1%	0,2%	0,4%
12	0,2%	0,0%	0,8%	0,2%	0,2%	0,4%
13	0,1%	0,0%	0,7%	0,3%	0,1%	0,3%
14	0,2%	0,0%	1,1%	2,1%	0,3%	0,8%
15	0,3%	0,5%	1,3%	1,7%	0,5%	0,9%
16	0,3%	0,7%	0,9%	0,5%	0,7%	0,6%
17	0,2%	0,0%	0,5%	0,6%	0,2%	0,4%
18	0,1%	0,2%	0,7%	0,6%	0,1%	0,4%
19	0,1%	0,0%	0,4%	0,5%	0,1%	0,3%
20	0,1%	0,0%	0,4%	0,3%	0,0%	0,2%
21	0,2%	0,0%	0,4%	0,2%	0,0%	0,2%
22	0,2%	0,0%	0,3%	0,5%	0,0%	0,2%
23	0,2%	0,2%	0,2%	0,1%	0,0%	0,1%
24	0,2%	0,0%	0,3%	0,3%	0,1%	0,2%
25	0,2%	0,0%	0,4%	0,6%	0,2%	0,3%
26	0,3%	0,0%	0,5%	1,0%	0,3%	0,5%
27	1,0%	9,1%	4,7%	7,6%	2,0%	3,6%
28	0,1%	2,6%	0,2%	0,1%	0,0%	0,2%
29	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%
Total film titles	7 349	417	8 564	3 148	3 303	22 781

Source: European Audiovisual Observatory

3.3.3. Circulation of film titles by country of production

Table 62 Top 20 countries of production by number of titles in 45 SVOD services and average country and service circulation

Overall rank	Country of production	Total film titles	Average country circulation	Average SVOD catalogues circulation	% of total film titles	Region
1	US	8 564	4,80	4,89	44,0%	US
2	DE	1 491	1,73	1,79	7,7%	EU
3	GB	1 352	3,85	3,92	6,9%	EU
4	FR	1 286	1,97	2,06	6,6%	EU
5	IN	692	8,00	8,03	3,6%	INT
6	CA	606	3,81	3,85	3,1%	INT
7	CZ	582	1,07	1,16	3,0%	EU
8	IT	557	1,67	1,72	2,9%	EU
9	SE	415	2,54	2,56	2,1%	EU
10	AT	295	1,31	1,32	1,5%	EU
11	ES	281	4,90	4,95	1,4%	EU
12	AU	240	3,74	3,80	1,2%	INT
13	DK	229	2,34	2,39	1,2%	EU
14	BE	213	1,62	1,64	1,1%	EU
15	HK	204	2,63	2,67	1,0%	INT
16	JP	204	3,10	3,13	1,0%	INT
17	NL	178	2,81	2,83	0,9%	EU
18	KR	114	5,47	5,52	0,6%	INT
19	CN	113	5,00	5,04	0,6%	INT
20	NO	108	2,57	2,61	0,6%	EUROBS
	Total 20	17 724	3,87	3,94	91%	

Source: European Audiovisual Observatory



Table 63 Ranking EU 28 and EUROBS countries by number of titles in 45 SVOD services and average country and service circulation

Overall rank	European Rank	Country of production	Total film titles	Average country circulation	Average SVOD catalogue circulation	% of European film titles	Region
2	1	DE	1 491	1,7	1,8	19,2%	EU
3	2	GB	1 352	3,8	3,9	17,4%	EU
4	3	FR	1 286	2,0	2,1	16,6%	EU
7	4	CZ	582	1,1	1,2	7,5%	EU
8	5	IT	557	1,7	1,7	7,2%	EU
9	6	SE	415	2,5	2,6	5,3%	EU
10	7	AT	295	1,3	1,3	3,8%	EU
11	8	ES	281	4,9	4,9	3,6%	EU
13	9	DK	229	2,3	2,4	2,9%	EU
14	10	BE	213	1,6	1,6	2,7%	EU
17	11	NL	178	2,8	2,8	2,3%	EU
20	12	NO	108	2,6	2,6	1,4%	EUROBS
21	13	RU	100	1,7	1,7	1,3%	EUROBS
22	14	CH	98	1,4	1,4	1,3%	EUROBS
24	15	PL	91	1,5	1,6	1,2%	EU
25	16	IE	84	3,2	3,2	1,1%	EU
26	17	TR	78	16,7	16,9	1,0%	EUROBS
28	18	FI	70	2,0	2,0	0,9%	EU
35	19	RO	42	1,2	1,2	0,5%	EU
38	20	SK	35	1,4	1,4	0,5%	EU
42	21	HU	27	1,3	1,3	0,3%	EU
44	22	BG	25	2,0	2,0	0,3%	EU
45	23	GR	23	1,3	1,3	0,3%	EU
48	24	LT	19	1,0	1,0	0,2%	EU
47	25	IS	19	2,9	3,0	0,2%	EUROBS
54	26	EE	11	3,7	3,8	0,1%	EU
55	27	LU	11	1,6	1,6	0,1%	EU
57	28	HR	9	4,1	4,1	0,1%	EU
58	29	LV	9	1,3	1,3	0,1%	EU
61	30	PT	9	5,6	5,6	0,1%	EU
66	31	GE	7	4,1	4,1	0,1%	EUROBS
76	32	SI	4	5,5	5,5	0,1%	EU
74	33	MK	4	1,0	1,0	0,1%	EUROBS
87	34	BA	2	2,5	2,5	0,0%	EUROBS
101	35	CY	1	1,0	1,0	0,0%	EU
96	36	AL	1	3,0	3,0	0,0%	EUROBS
110	37	MA	1	1,0	1,0	0,0%	EUROBS
37 OBS		Total EU and EUROBS	7 767	2,5	2,5	100%	

Source: European Audiovisual Observatory



Table 64 Top 20 countries of production by average country circulation (at least 50 film titles)

Overall rank	Country of production	Total film titles	Average country circulation	Average SVOD catalogue circulation	% of total film titles	Region
26	TR	78	16,7	16,9	0,4%	EUROBS
30	BR	64	12,5	12,6	0,3%	INT
27	AR	72	10,7	10,7	0,4%	INT
23	MX	91	8,8	8,8	0,5%	INT
5	IN	692	8,0	8,0	3,6%	INT
18	KR	114	5,5	5,5	0,6%	INT
31	IL	62	5,1	5,1	0,3%	INT
19	CN	113	5,0	5,0	0,6%	INT
11	ES	281	4,9	4,9	1,4%	EU
1	US	8 564	4,8	4,9	44,0%	US
3	GB	1 352	3,8	3,9	6,9%	EU
6	CA	606	3,8	3,8	3,1%	INT
12	AU	240	3,7	3,8	1,2%	INT
34	NZ	52	3,2	3,3	0,3%	INT
25	IE	84	3,2	3,2	0,4%	EU
16	JP	204	3,1	3,1	1,0%	INT
17	NL	178	2,8	2,8	0,9%	EU
32	ZA	57	2,8	2,8	0,3%	INT
15	HK	204	2,6	2,7	1,0%	INT
20	NO	108	2,6	2,6	0,6%	EUROBS
Total 20		13 216	4,9	4,9	68%	

Source: European Audiovisual Observatory

3.4. Share of recent and catalogue films and film titles

Distinction between catalogue and recent films

Catalogue films are defined as films produced in 2007 and before as the catalogue data gathering has taken place in 2017 and early 2018. Recent films are therefore films produced in 2008 and after. Unidentified films have been excluded from the analysis, even if their year of production was available.

On the share of recent and catalogue films in the 45 SVOD catalogues

69% of all films were recent films, with national films being the least recent ones with only 56% of recent films, followed by US films with 65% of recent films. EU 28 films had a share of 70% of recent films (with a share of 74% of recent films for EU non-national and 56% for national films) and the most recent films were other international films with 79% of recent films and EUR OBS films, with 86% recent films of all EUR OBS films. **Table 65** and **Figure 70**

This tends to demonstrate again that audiences tend to watch more willingly national and US catalogue films than films of other origins; these may be classics or older “blockbusters”.

The average production year for all films identified was 2007, with EUR OBS having the highest average production year with 2011, followed by other international films with 2010, EU 28 with 2007, US films with 2006 and national films with 2003. **Table 66**

Half of all EU28 films were produced in or after 2012, for national films this was 2009, for EUR OBS films 2013, for US films 2011 and for other international films 2014. For all films, 50% were produced in or after 2013 – half of the films found in the catalogues being therefore less than 5 years old. **Table 66**

On the share of recent and catalogue unique film titles in the catalogues

58% of unique film titles were recent titles, with recent EUR OBS titles having a share of 75%, followed by other international titles with 62%, and EU and US titles being recent for only 57% of titles. **Table 67** and **Figure 71**

The average production year for all film titles was 2003, led by EUR OBS titles with the average year 2009, other international titles with 2004, and EU and US titles with 2003. Half of all titles were produced in or after 2010; for EUROBS titles the year was 2012, for international titles 2011, and for EU and US titles 2010. **Table 68**



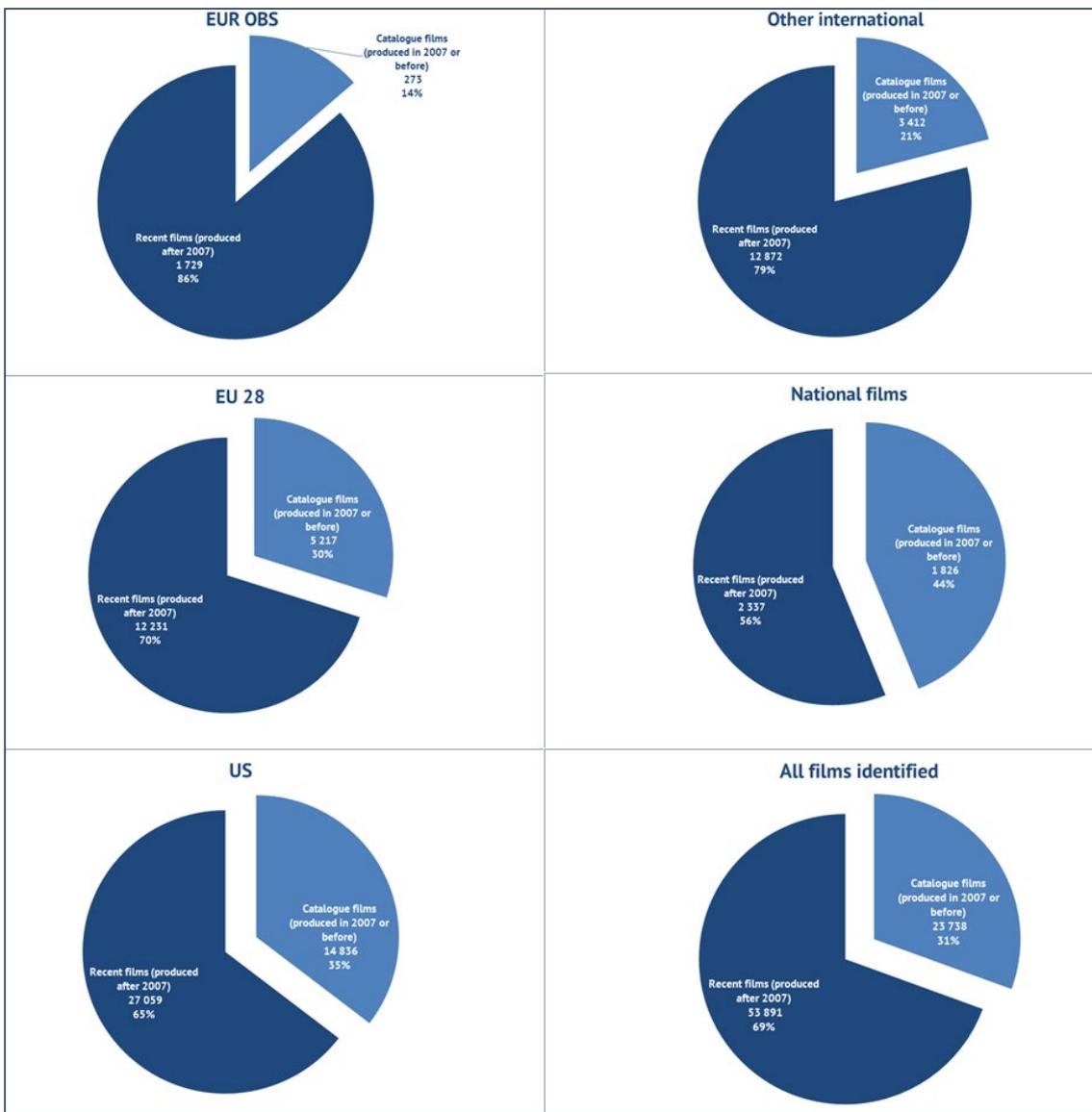
3.4.1. Films and film titles on 45 SVOD services

Table 65 Number and share of recent and catalogue films by region of origin in SVOD catalogues

	EU 28	of which National films	of which EU non-national	EUR OBS	US	Other international	All films identified
Catalogue films (produced in 2007 or before)	5 217	1 826	3 391	273	14 836	3 412	23 738
Recent films (produced after 2007)	12 231	2 337	9 894	1 729	27 059	12 872	53 891
Total	17 448	4 163	13 285	2 002	41 895	16 284	77 629
Catalogue films (produced in 2007 or before)	30%	44%	26%	14%	35%	21%	31%
Recent films (produced after 2007)	70%	56%	74%	86%	65%	79%	69%

Source: European Audiovisual Observatory

Figure 70 Overview – Shares of recent and catalogues films in SVOD catalogues by region of origin



Source: European Audiovisual Observatory

Table 66 Average year of production for films by region of origin in TVOD catalogues

	EU 28	of which National	EUR OBS	US	Other international	All
Average year of production	2007	2003	2011	2006	2010	2007
50% of films produced in and after	2012	2009	2013	2011	2014	2013
80% of films produced in and after	2004	1994	2010	2001	2008	2004
90% of films produced in and after	1990	1980	2006	1993	200	1994

Source: European Audiovisual Observatory

Table 67 Number and share of recent and catalogue film titles by region of origin in SVOD catalogues

	EU 28	EUR OBS	US	Other international	All film titles identified
Catalogue film titles (produced in 2007 or before)	3 113	102	3 697	1 204	8 116
Recent film titles (produced after 2007)	4 206	310	4 827	1 936	11 279
Total	7 319	412	8 524	3 140	19 395
Catalogue film titles (produced in 2007 or before)	43%	25%	43%	38%	42%
Recent film titles (produced after 2007)	57%	75%	57%	62%	58%

Source: European Audiovisual Observatory

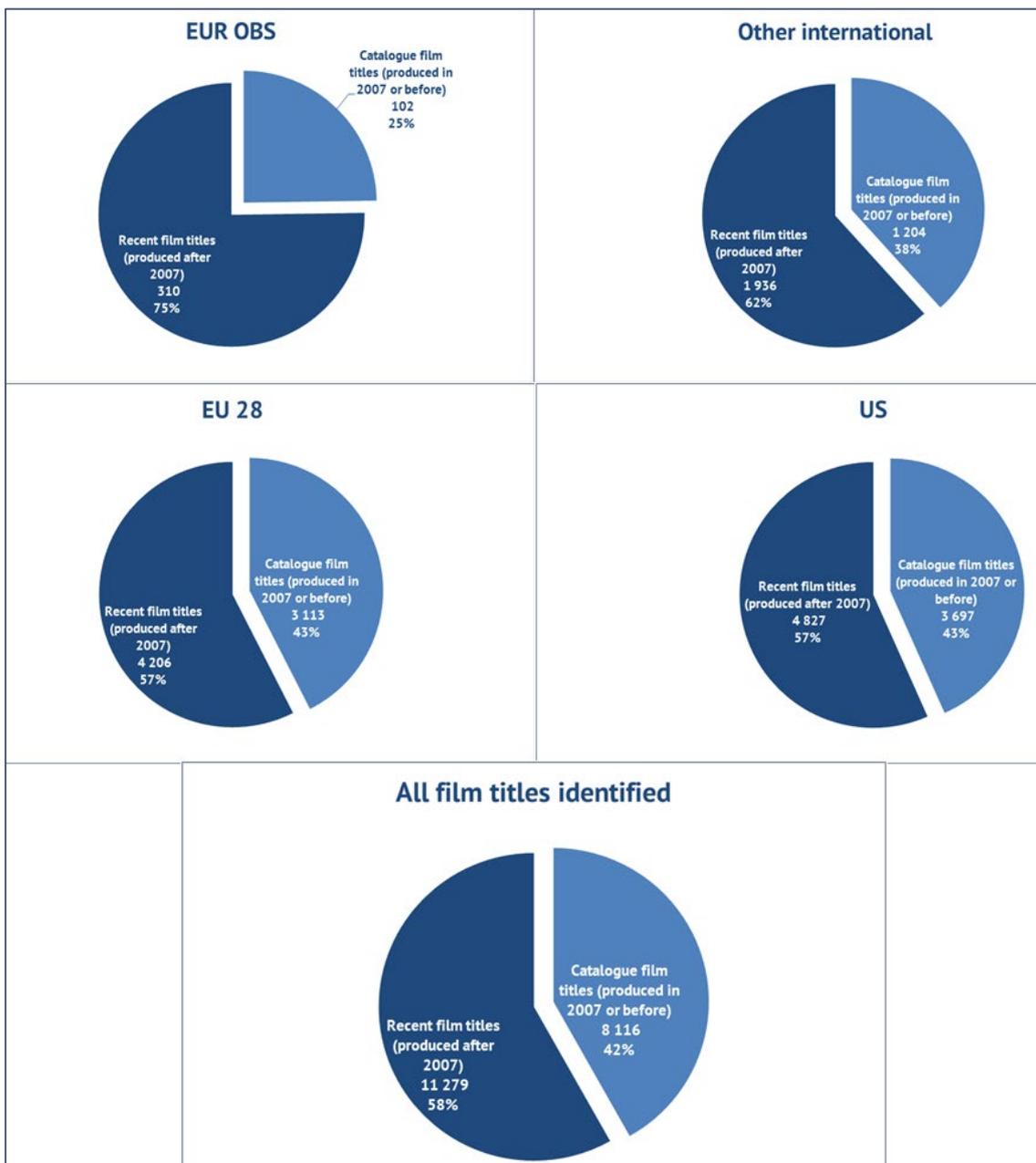
Table 68 Average year of production for film titles by region of origin in SVOD catalogues

	EU 28	EUR OBS	US	Other international	All identified film titles
Average year of production	2003	2009	2003	2004	2003
50% of film titles produced in and after	2010	2012	2010	2011	2010
80% of film titles produced in and after	1995	2007	1996	1994	1996
90% of film titles produced in and after	1978	2004	1984	1994	1996

Source: European Audiovisual Observatory



Figure 71 Overview – Shares of recent and catalogues film titles in SVOD catalogues, by region of origin



Source: European Audiovisual Observatory

3.4.2. Share of recent films in 45 SVOD services by origin

On the share of recent films in individual SVOD catalogues

On average, the 9 national SVOD services had a share of recent films of 54%. They offered more US catalogue films with a share of recent films of only 45% (and therefore a share of 55% of US catalogue films). Netflix had the highest average share of recent films with 75%, only surpassed by Belgacom Proximus with a share of recent films of 88%. Overall, the 45 SVOD services had a share of recent films of 70%. **Table 69** and **Figure 75**

8 SVOD services were offering overall more catalogue films than recent films to their subscribers; the 3 C More catalogues with an average share of recent films of 47%, Sky Now with a share of recent films of 42%, Canal Play with a share of 41%, TIMVision with a share of 34%, SFR Play with 34% and Virgin Media with 28%.

The most recent EU films were found in the catalogues of Belgacom with 92% of recent films and in the Netflix catalogues with an average of 82% of recent EU films. The 3 C More catalogues, Canal Play, Virgin Media and TIMvision all had a share of recent EU films below 50%. For all catalogues, on average EU films were for 70% recent films. **Figure 72**

8 catalogues relied more on catalogue films for their national film offer, mostly national SVOD services, with TIMVision having only a share of recent national films of 18%, and the C More catalogues (average 26% of recent national films), with C More Sweden having a share of recent national films of 17%. Overall, the share of recent national films in all catalogues was at 56%. **Figure 73**

On the other hand, for EU non-national films, the majority of services, 38, offered more recent films, with an average share for EU non-national recent films of 74%. Belgacom and the Netflix's catalogues offered the most recent EU non-national film titles. **Figure 74**

5 services had more US catalogue films in their catalogues, all except Virgin Media, national services; Sky Now with a share of recent US films of 34%, TIMVision with a share of 33% recent US films, Canal Play with a share of 32% and SFR Play with 21%. These catalogues were mainly composed of older US blockbusters for US films.

As opposed to TVOD services, national SVOD services tended to offer more catalogue films in their catalogues than multi-country services. Exclusive licensing of newer films, rights costs could be explaining factors.

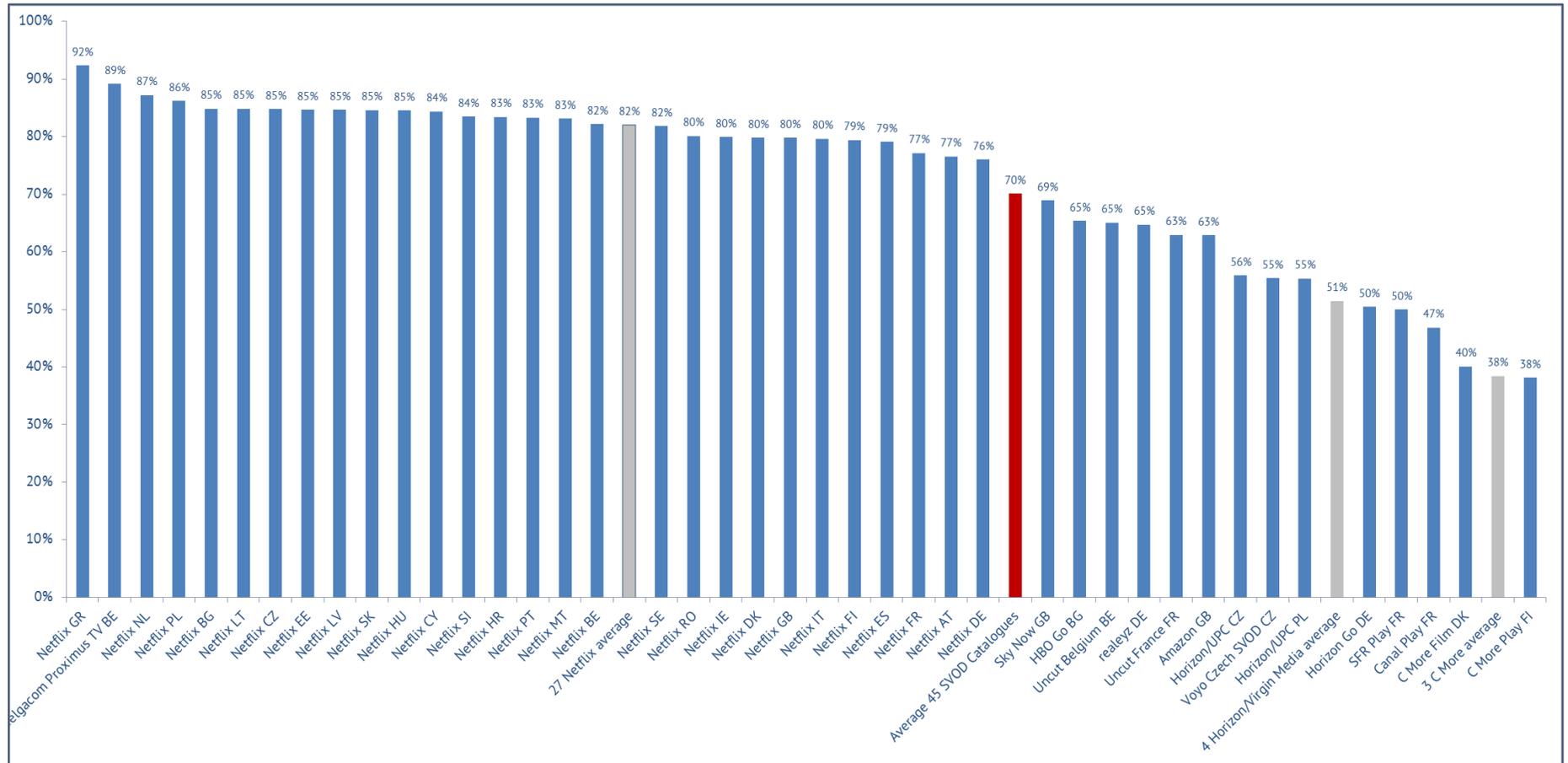


Table 69 45 SVOD services - Share of recent films in percentages by region of origin, in % of total

	EU 28	of which national	of which EU non-national	EUR OBS	US	Other international	All films identified
Amazon GB	63%	74%	55%	80%	68%	56%	64%
Belgacom Proximus TV BE	89%	86%	89%	75%	83%	97%	88%
C More Film DK	40%	86%	36%	77%	54%	73%	48%
C More Film Sweden SE	37%	17%	73%	77%	55%	75%	47%
C More Play FI	38%	31%	39%	87%	54%	81%	46%
Canal Play FR	47%	48%	44%	82%	32%	55%	41%
HBO Go BG	65%	80%	65%	87%	56%	72%	61%
Horizon Go DE	50%	47%	55%	66%	59%	53%	56%
Horizon/UPC CZ	56%	43%	64%	100%	59%	44%	57%
Horizon/UPC PL	55%	67%	55%	0%	74%	33%	63%
Netflix AT	77%	67%	77%	89%	65%	86%	73%
Netflix BE	82%	100%	82%	89%	70%	84%	76%
Netflix BG	85%	-	85%	91%	65%	81%	74%
Netflix CY	84%	-	84%	91%	63%	82%	74%
Netflix CZ	85%	-	85%	91%	65%	78%	73%
Netflix DE	76%	66%	81%	90%	66%	87%	74%
Netflix DK	80%	69%	82%	87%	68%	88%	75%
Netflix EE	85%	100%	85%	91%	65%	81%	74%
Netflix ES	79%	69%	82%	89%	70%	86%	76%
Netflix FI	79%	80%	79%	87%	64%	87%	72%
Netflix FR	77%	67%	82%	89%	69%	83%	75%
Netflix GB	80%	74%	86%	88%	67%	81%	74%
Netflix GR	92%	-	92%	91%	84%	87%	87%
Netflix HR	83%	100%	83%	91%	65%	81%	74%
Netflix HU	85%	-	85%	91%	66%	81%	75%
Netflix IE	80%	79%	80%	88%	66%	83%	74%
Netflix IT	80%	72%	82%	89%	64%	85%	72%
Netflix LT	85%	-	85%	91%	64%	78%	73%
Netflix LV	85%	-	85%	91%	65%	81%	74%
Netflix MT	83%	-	83%	90%	68%	82%	76%
Netflix NL	87%	90%	86%	89%	75%	87%	81%
Netflix PL	86%	100%	86%	89%	67%	87%	75%
Netflix PT	83%	100%	83%	89%	69%	85%	77%
Netflix RO	80%	-	80%	88%	66%	83%	74%
Netflix SE	82%	85%	81%	88%	69%	87%	76%
Netflix SI	84%	-	84%	91%	65%	81%	74%
Netflix SK	85%	100%	85%	91%	65%	81%	74%
realeyz DE	65%	65%	64%	74%	76%	77%	69%
SFR Play FR	50%	53%	45%	80%	21%	33%	34%
Sky Now GB	69%	69%	68%	100%	34%	77%	42%
TIMVISION IT	32%	18%	42%	100%	33%	43%	34%
Uncut Belgium BE	65%	66%	65%	82%	55%	59%	62%
Uncut France FR	63%	47%	83%	67%	100%	67%	66%
Virgin Media IE	35%	-	35%	-	19%	55%	28%
Voyo Czech SVOD CZ	55%	42%	-	53%	58%	39%	53%
Average 45 SVOD Catalogues	70%	56%	74%	86%	65%	79%	70%
27 Netflix catalogues average	82%	73%	83%	90%	67%	83%	75%
4 Horizon/Virgin Media catalogues average	51%	46%	56%	68%	57%	52%	56%
3 C More catalogues average	38%	26%	43%	79%	55%	77%	47%
Average 9 national SVOD services	60%	53%	65%	73%	45%	58%	54%

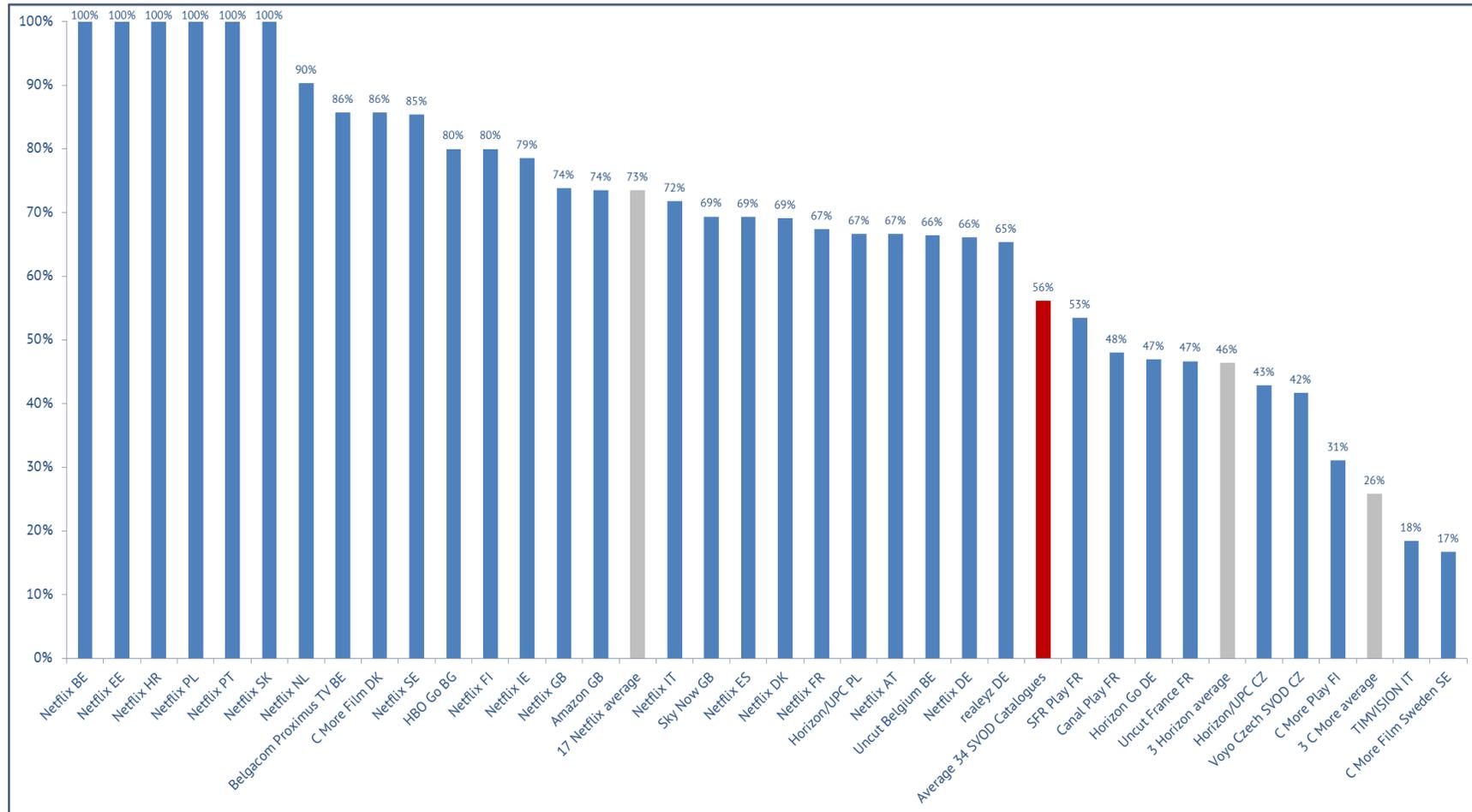
Source: European Audiovisual Observatory

Figure 72 Share of recent EU films in SVOD catalogues, by services and in % of total EU films



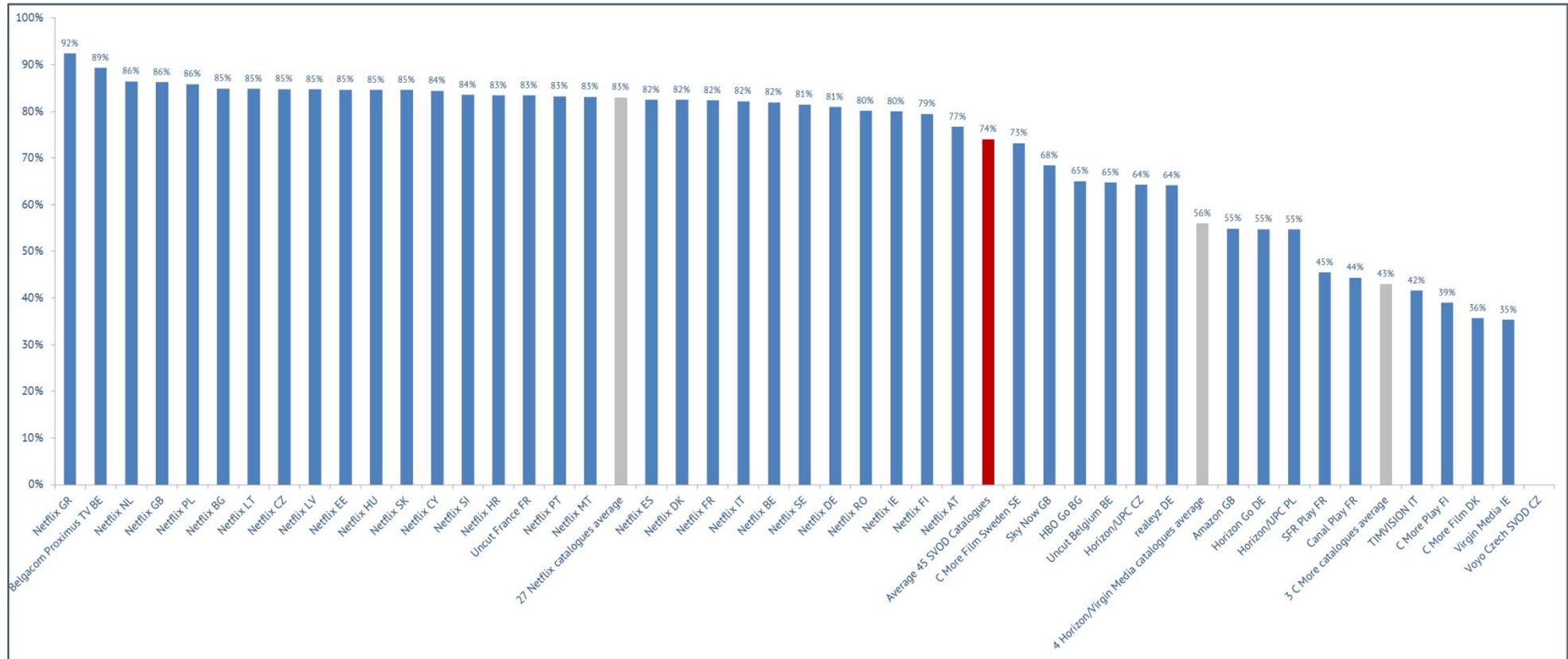
Source: European Audiovisual Observatory

Figure 73 Share of recent national films in SVOD catalogues, by service and in % of total national films



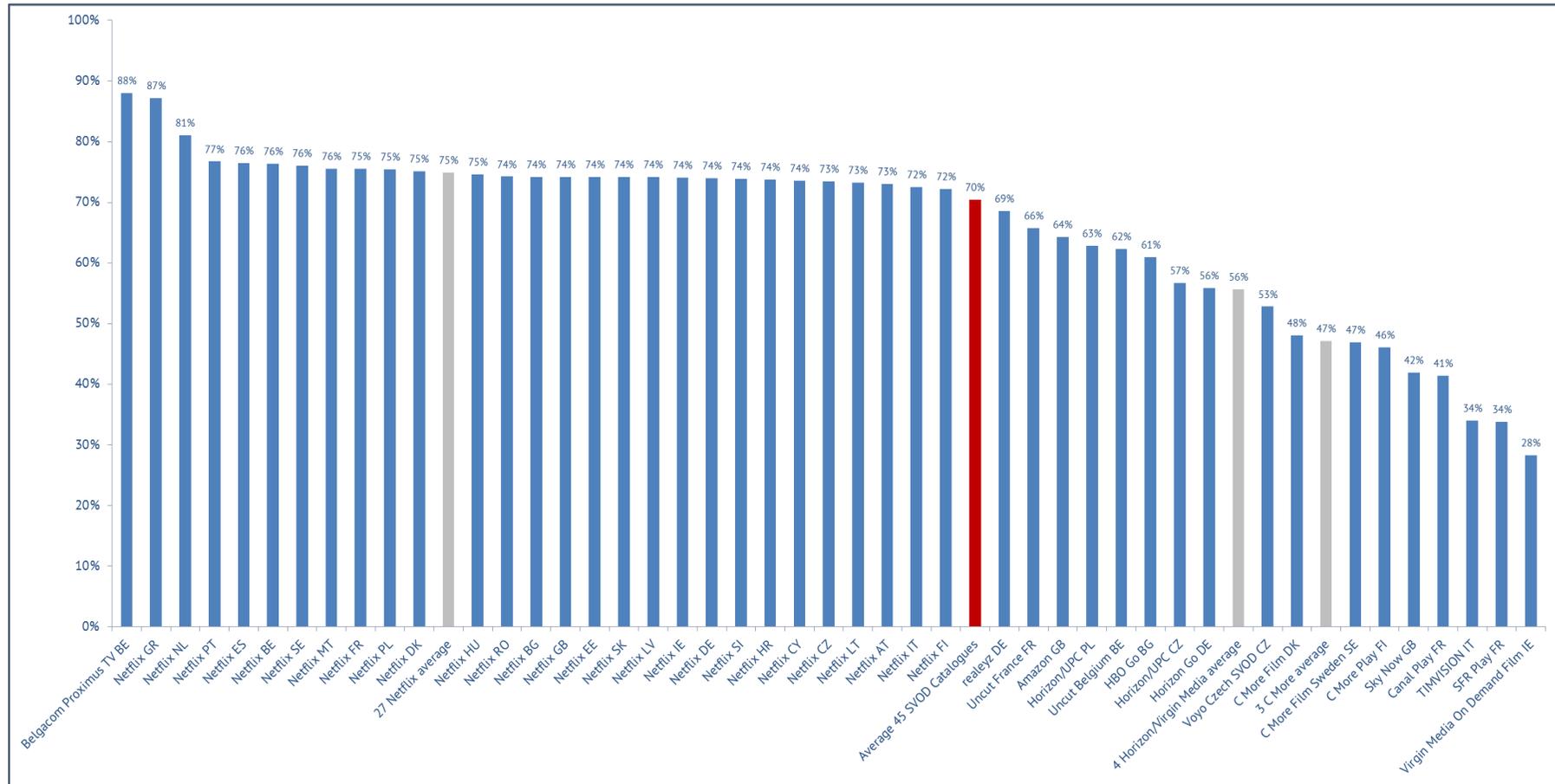
Source: European Audiovisual Observatory

Figure 74 Share of recent EU non-national films in 45 SVOD catalogues, by service and in % of total EU non-national films



Source: European Audiovisual Observatory

Figure 75 Share of all recent films in SVOD catalogues, by service and in % of total films identified



Source: European Audiovisual Observatory

3.4.3. Country and service circulation of catalogue and recent films

On the circulation in one and more than one country of recent and catalogue film titles

58% of all recent film titles were only available in one country, whereas this concerned 66% of all catalogue film titles. As it was the case on TVOD services, recent film titles circulated better in EU countries as customers, and for SVOD services subscribers, tend to want to watch more recent films. **Table 70**

EU recent and catalogue film titles were the titles for which the circulation beyond one country was the smallest; 69% of recent EU titles were only available in one country, and this was the case for 78% of EU catalogue titles (but for almost all catalogue titles of the different region of origins, except US catalogue titles, over 75% were only available in one country). US recent titles circulated the best, with half of the titles being available in only one country, and half in more than one country, followed by recent other international titles for which only 56% were only available in one country. US catalogue titles circulated also the best, with only 52% of titles being available in only one country. For all other regions of origin, less than ¼ of catalogue titles were available in more than one country. **Figure 76** and **Figure 77**

On the circulation on one or more than SVOD service of recent and catalogue film titles

As it was the case with circulation of unique titles, the figures are very close to the ones of country circulation due to a smaller service sample.

Overall, 57% recent film titles were available on only one service, and this was true for over ¾ of catalogue films titles. 2/3 of EU recent film titles were only available on one SVOD service, this concerned 60% of EUR OBS titles, 50% of recent US titles and 55% of other international titles. **Figure 78** and **Table 71**

Catalogue film titles struggled much more than recent film titles to be present on more than one SVOD service, with on average 65% of all catalogue film titles being only present on one SVOD service. This was only true for 51% of US catalogue film titles, but for all other regions of origin, more than ¾ of catalogue titles were only available on one service. **Figure 79**

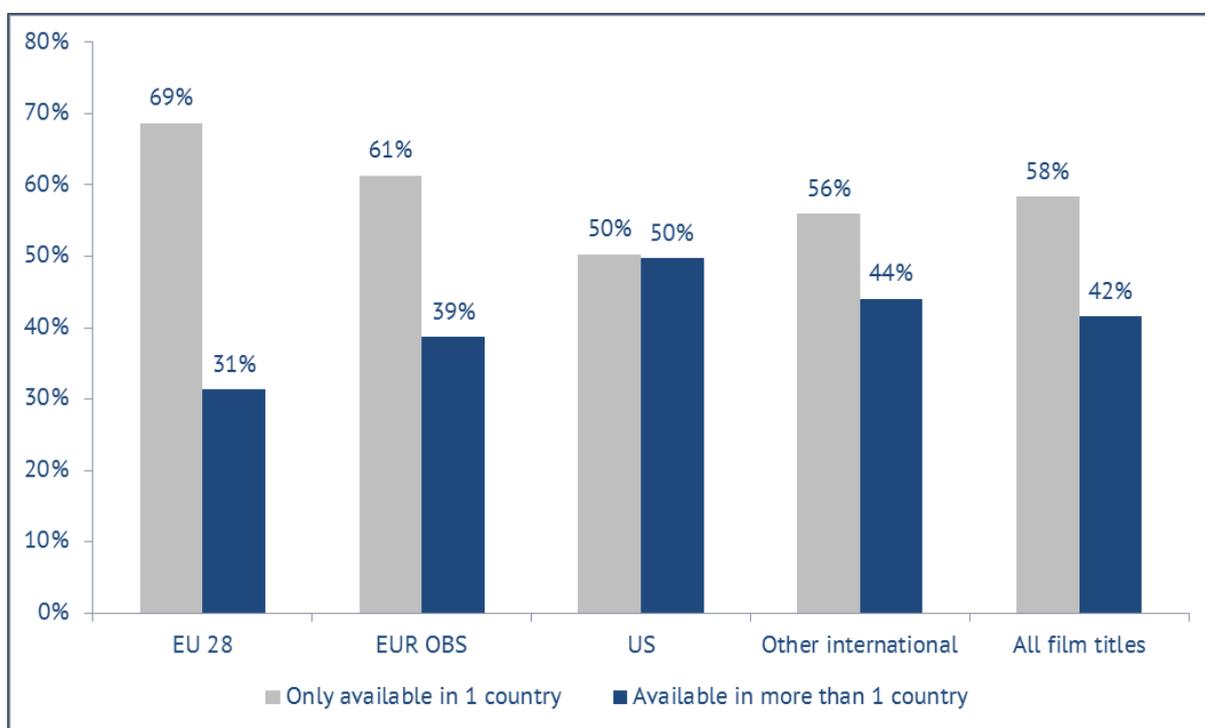
3.4.3.1. Country circulation of catalogue and recent film titles by region of origin

Table 70 SVOD - Country circulation of catalogue & recent film titles in 1 and more than 1 country, by region of origin

Film titles	Catalogues film titles					Recent film titles				
	EU 28	EUR OBS	US	Other international	All film titles	EU 28	EUR OBS	US	Other international	All film titles
Only available in 1 country	2 437	78	1 920	928	5 363	2 887	190	2 426	1 083	6 586
Available in more than 1 country	676	24	1 777	276	2 753	1 319	120	2 401	853	4 693
Total film titles	3 113	102	3 697	1 204	8 116	4 206	310	4 827	1 936	11 279
Only available in 1 country	78%	76%	52%	77%	66%	69%	61%	50%	56%	58%
Available in more than 1 country	22%	24%	48%	23%	34%	31%	39%	50%	44%	42%

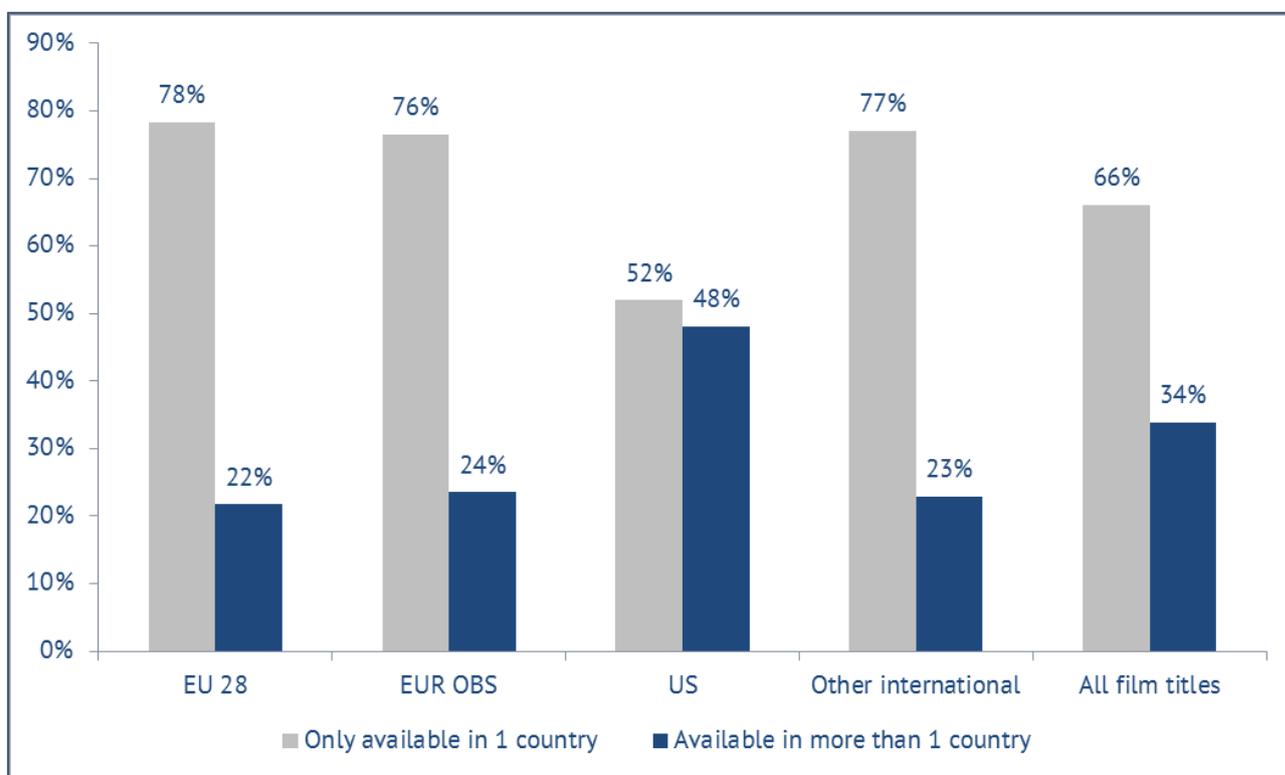
Source: European Audiovisual Observatory

Figure 76 SVOD - Circulation of recent film titles in 1 and more than 1 country by region of origin, in %



Source: European Audiovisual Observatory

Figure 77 SVOD - Circulation of catalogue film titles in 1 and more than 1 country by region of origin, in %



Source: European Audiovisual Observatory

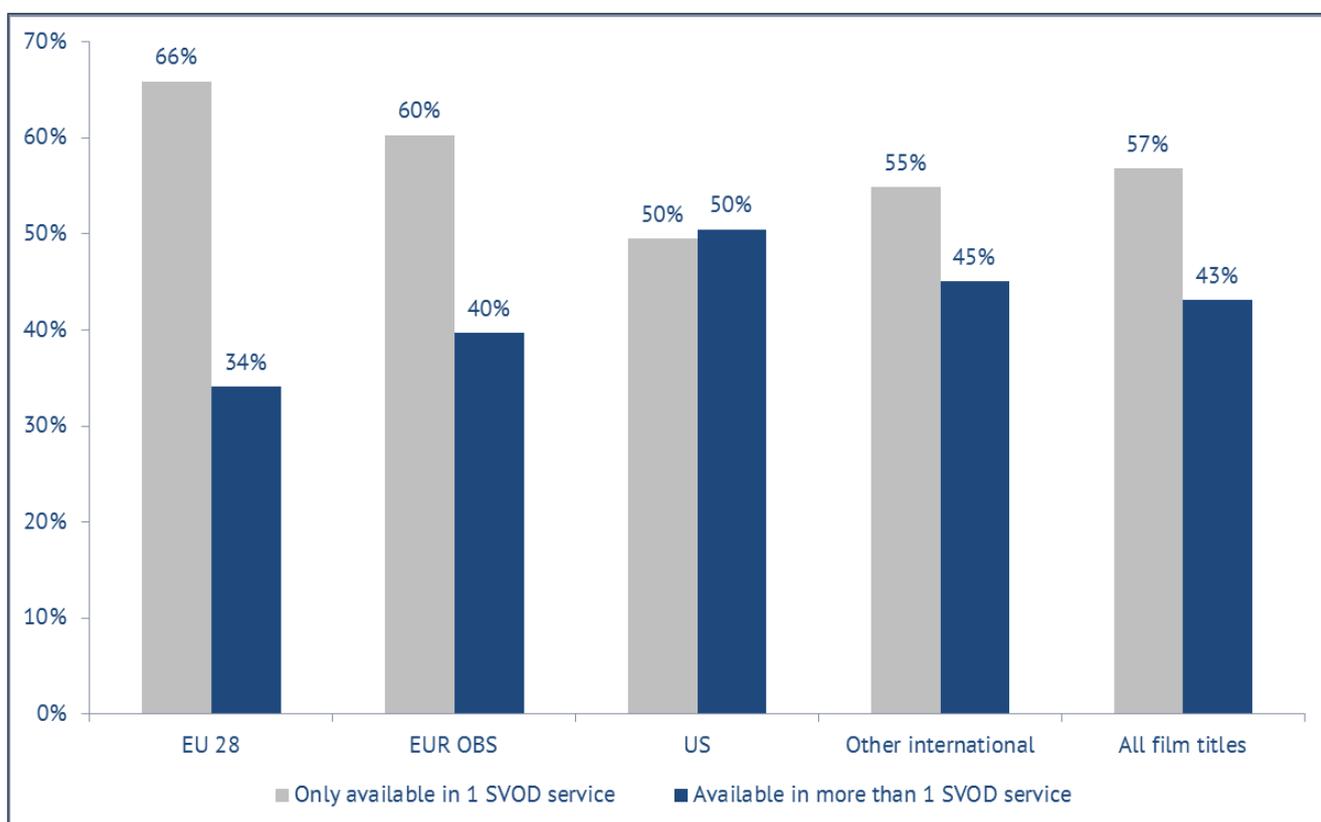
3.4.3.2. Service circulation of catalogue and recent film titles by region of origin

Table 71 Service circulation of catalogue & recent film titles in 1 and more than 1 SVOD service, by region of origin

Film titles	Catalogues film titles					Recent film titles				
	EU 28	EUR OBS	US	Other international	All film titles	EU 28	EUR OBS	US	Other international	All film titles
Only available in 1 SVOD service	2 373	78	1 877	922	5 250	2 773	187	2 390	1 063	6 413
Available in more than SVOD service	740	24	1 820	282	2 866	1 433	123	2 437	873	4 866
Total film titles	3 113	102	3 697	1 204	8 116	4 206	310	4 827	1 936	11 279
Only available in 1 SVOD service	76%	76%	51%	77%	65%	66%	60%	50%	55%	57%
Available in more than 1 SVOD service	24%	24%	49%	23%	35%	34%	40%	50%	45%	43%

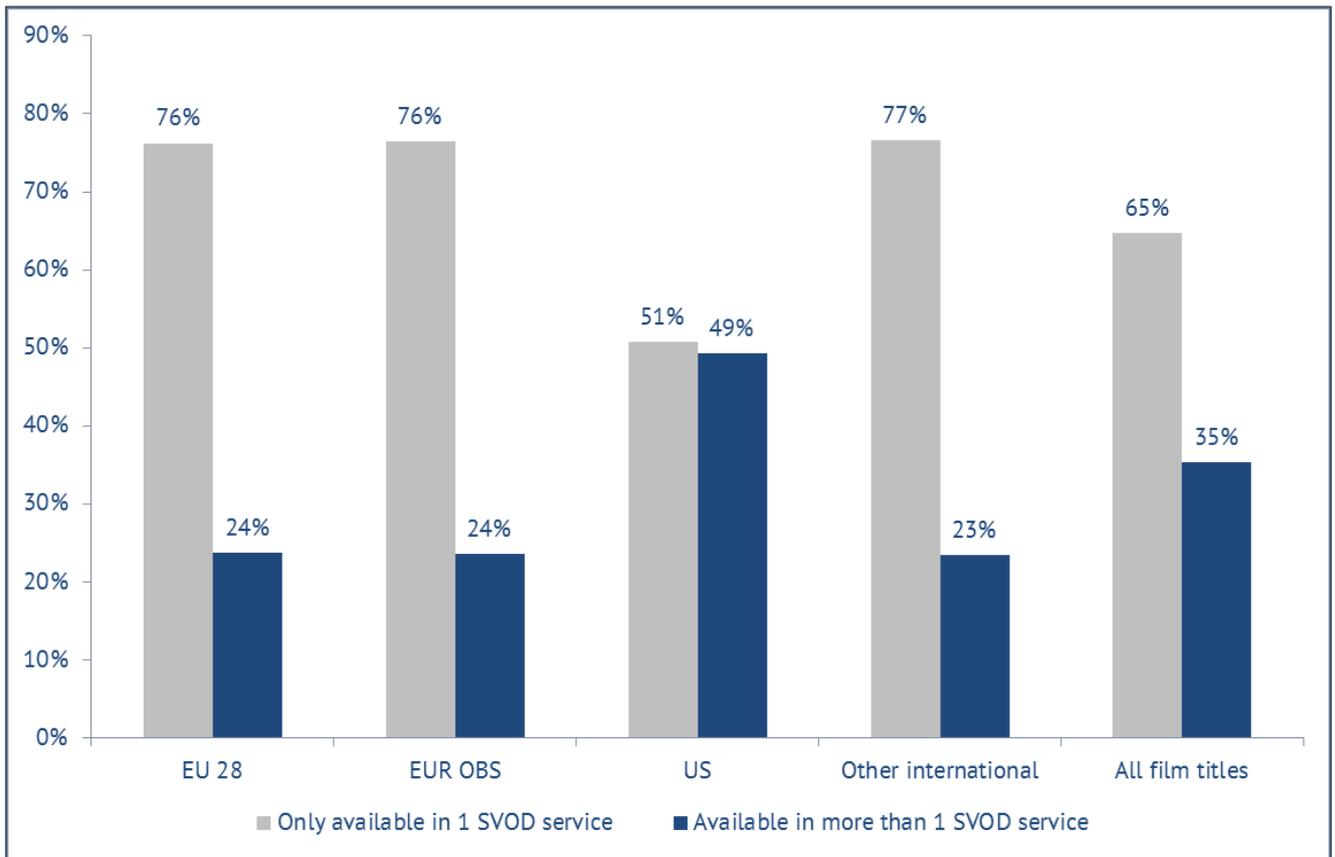
Source: European Audiovisual Observatory

Figure 78 Service circulation on 1 and more than 1 SVOD service of recent film titles by region of origin, in %



Source: European Audiovisual Observatory

Figure 79 Service circulation on 1 and more than 1 SVOD service of catalogue film titles by region of origin



Source: European Audiovisual Observatory

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