



Film and TV content in VOD catalogues – 2020 Edition

Presentación del informe del Observatorio Europeo del Audiovisual

Universidad Carlos III Madrid
3 de marzo, 2021

Marta Jiménez Pumares

Analista – Mercados Europeos de TV y VOD



EAO

**Who
What
How**

Content of the presentation

A – The European Audiovisual Observatory

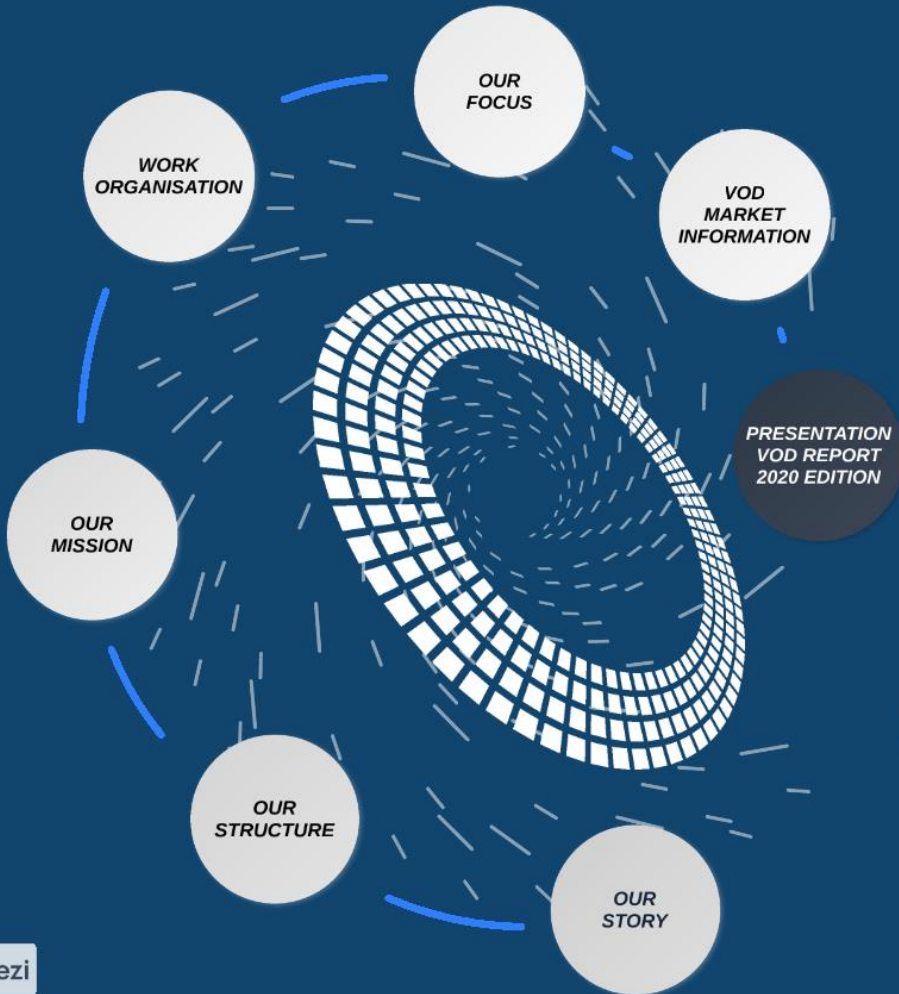
Who we are, what we do

How we do it: background of the report

B – Film and TV content in VOD catalogues in Europe – 2020 Edition

Methodology

Main findings



European Audiovisual Observatory

The reference for market and
legal information on film,
television and VOD in Europe

Our Story

Created in [1992](#) in Strasbourg

To provide much needed information
on the audiovisual industries in Europe

We called this "lack of transparency"
at the time!

OUR RANGE

**OUR
MEMBER
COUNTRIES**

The range of our work

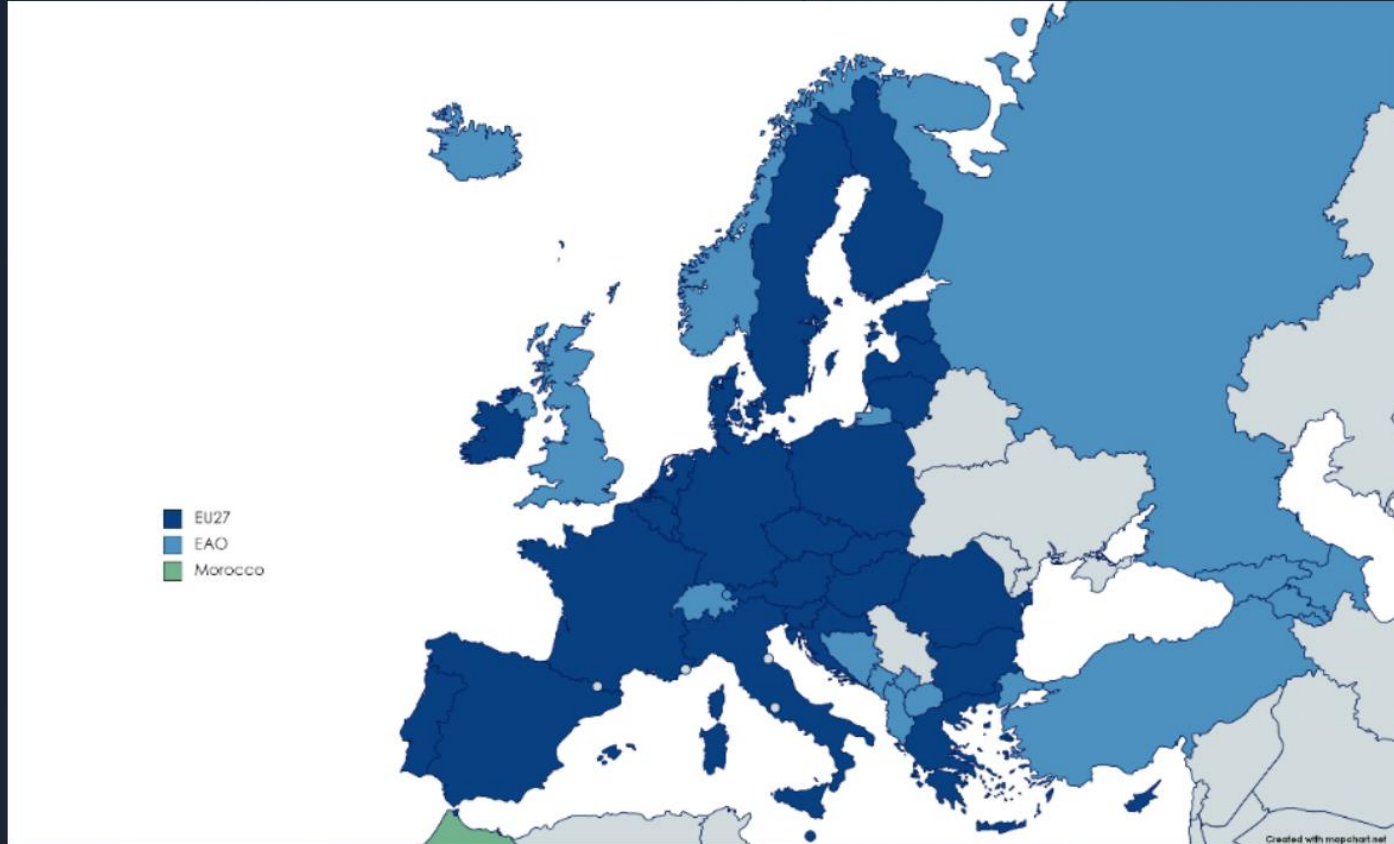
41 member countries

plus the European Union which has member status
and is represented by the European Commission

We cover Council of Europe countries such as Armenia, Turkey and
Russia

And we also have Morocco as a member state (non EU and non COE)

41 member states plus the EU



Our structure

Part of the Council of Europe in Strasbourg

International team of 25 Europeans
from 9 countries

Three official languages: EN, FR, DE



***Our
governing
bodies***

***Relationship
to the
Council of
Europe***

Our networks

Our governing bodies

Executive Council

All our member countries represented

Members come from national culture or telecommunications ministries, or regulatory bodies, or film institutes

They meet twice a year and green light our action plan and budget

Advisory Committee

All major AV industry interest groups represented

39 different international and European organisations in this body

They meet once a year in Strasbourg and give us grass roots feedback about the information that the AV industries need for their work

Observatory and the Council...

Linked to the Council by:

Statutory setting as partial and enlarged agreement

Council of Europe Staff Regulations

Different from the Council:

Industry as first client

Prohibition to pursue or promote policies

Independent from the Council:

Mid-term Strategy

Yearly Action Plan

Related (yearly) Budget

Our networks

Over 1 000 international partners, providers and correspondents

Market Department networks

EFARN network: the Heads of Research and Statistics from film agencies. In the framework of the European Film Agency Directors (EFAD) group.

LUMIERE network: national film agencies, distributors' organisations or market research firms provide Lumiere database cinema admissions data.

LUMIERE VOD network: partners providing data on European film and TV content available on VOD in EU.

MAVISE network: correspondents from European television companies and broadcasters supply key AV services and licences data to feed MAVISE database.

Legal Department networks

IRIS network: legal correspondents throughout Europe report on the latest legal developments in Europe concerning the audiovisual sector. Articles published in the IRIS newsletter and stored in the IRIS MERLIN database.

IRIS editorial board: representatives from our legal network who assist in deciding on the Observatory's legal information and publications.

Partner Organisations

EMR - Institute of European Media Law

IViR - Institute for Information Law

Our Mission

We **collect**, **process** and **distribute** information on cinema, TV and VOD in Europe

Our information takes the form of:

Reports Mappings

Databases An online Yearbook

Conferences and presentations

Newsletters

Our users

Who uses all this information?

The European Commission

The European Parliament

National government decision makers

Media law makers

Cinema, TV and VOD industry professionals

Journalists

Academics

Work organisation: 2 main Departments

Department for Legal Information

Department for Market Information

- + Press and Communication
- + Admin. Department

***Legal
Information***

***Legal
Topics***

***Market
Information***

***Market
Topics***

Department for Legal Information

IRIS *Special* Reports - In depth pan-European legal analysis: 2 per year

IRIS *Plus* Reports - Focus on hot legal topics in Europe: 3 per year

IRIS Monthly Newsletter - Latest legal developments in the audiovisual sector

Mapping Reports - country-by country reporting and comparative analysis of a specific legal media topic in Europe

IRIS MERLIN media law database
merlin.obs.coe.int

AVMSD database on the transposition of the
directive avmsd.obs.coe.int

Department for Legal Information

Typical subjects covered.....

Copyright

Film funding

Promotion of European films
and TV

Licensing media services



Cinema co-production

Protection of children from
harmful media content

Freedom of the press

Department for Market Information

Online Yearbook: Film, TV and on-demand services in 41 countries

Key Trends: The global view of the audiovisual sector (exec. summary of the Yearbook)

Numerous economic analysis reports on cinema, TV and VOD in Europe

LUMIERE film admissions database
lumiere.obs.coe.int

LUMIERE VOD database on VOD in the EU
lumierevod.obs.coe

MAVISE database on TV and VoD services in Europe
mavise.obs.coe.int

EFARN film research library: Studies and data from the European film agencies
filmresearch.eu

Department for Market Information

Typical subjects covered...

Production and
circulation of film and
TV programmes



Film financing in
Europe

Ownership of TV channels
and on-demand services
in Europe

Visibility and origin
of content available
on VOD

Cinema screen
density in Europe

Our Focus

Analyse data from 41 countries on European **audiovisual industries**:

Cinema

Television

Video on demand (VOD)

Cinema

Television

Video on Demand

The European cinema industry

How much does
a cinema ticket
cost in Finland?

How many
cinema screens
are there in Italy?

What was the
most popular
film in Europe
last year?



How many films
does the UK
produce?

How many
European films
are co-produced?

How well do
European films
perform outside
of Europe?

The European TV industry

How many TV channels are licensed in the UK?



Who owns the TV channels in Europe?

Which TV content features most in VOD catalogues?

Which European country has the most TV channels?

Which genre of TV channel is the most popular?

The European VOD industry

What EU rules exist to promote European content on VOD?

What is the origin of programmes and films on VOD?



How many VOD services currently operate in Europe?

Which EU laws control VOD in Europe?

Which companies dominate the VOD industry ?

VOD Market information

Examples of some outputs from the
VOD Department:

- Lumiere VOD: **now includes TV**
- Visibility of European content
- Trends in EU28 VOD (**New!**)
- From cinema to VOD
- VOD catalogues

Database
Lumiere VOD

Visibility
on TVOD


Trends in the
VOD market

VOD
catalogues

From cinemas
to VOD

Database Lumiere VOD

LUMIERE
VOD



European
Audiovisual
Observatory

CONNECT

HOME
ABOUT
CONTACT

The directory of European works

QUICK SEARCH →

Advanced search

REFINE BY

TYPE

Film (524 / 524)

TV Content (25 / 25)

TITLE

La pazzo gialla (52 / 52)

Anaconda III (43 / 43)

Springsteen & I (38 / 38)

Hope Springs (37 / 37)

Lole rennt (26 / 26)

Jungfruidkällan (25 / 25)

City of Two Springs (23 / 23)

[+ See more](#)

NAME OF DIRECTOR

Paolo Virzì (52 / 52)

Don E. FauntLeRoy (43 / 43)

Baillie Walsh (38 / 38)


Mark Herman (37 / 37)


Horitz Springer (37 / 37)


Tom Tykwer (26 / 26)


46 title(s) found


TITLE	COUNTRY	TYPE	YEAR	DIRECTOR	SERVICE	AVAILABILITY
A Cambodian Spring	United Kingdom, Cambodia	Film	2016	Christopher Keely	Amazon Prime Video GB	11/2020
A Cambodian Spring	United Kingdom, Cambodia	Film	2016	Christopher Keely	Amazon TVOD GB	11/2020
After Winter, Spring	United States of America, France	Film	2015	Judith Lit	Amazon Prime Video GB	11/2020
After Winter, Spring	United States of America, France	Film	2015	Judith Lit	Amazon TVOD GB	11/2020
An Unforgettable Spring in a Forgotten Village	North Macedonia	Film	2019	Kushtrim Bekteshi	Amazon Prime Video ES	11/2020
An Unforgettable Spring in a Forgotten Village	North Macedonia	Film	2019	Kushtrim Bekteshi	Amazon Prime Video GB	11/2020
An Unforgettable Spring in a Forgotten Village	North Macedonia	Film	2019	Kushtrim Bekteshi	Amazon Prime Video IE	11/2020
An Unforgettable Spring in a Forgotten Village	North Macedonia	Film	2019	Kushtrim Bekteshi	Amazon TVOD GB	11/2020
Anaconda III	United States of America, Romania	Film	2008	Don E. FauntLeRoy	Amazon TVOD AT	11/2020
Anaconda III	United States of America, Romania	Film	2008	Don E. FauntLeRoy	Amazon TVOD DE	11/2020






































































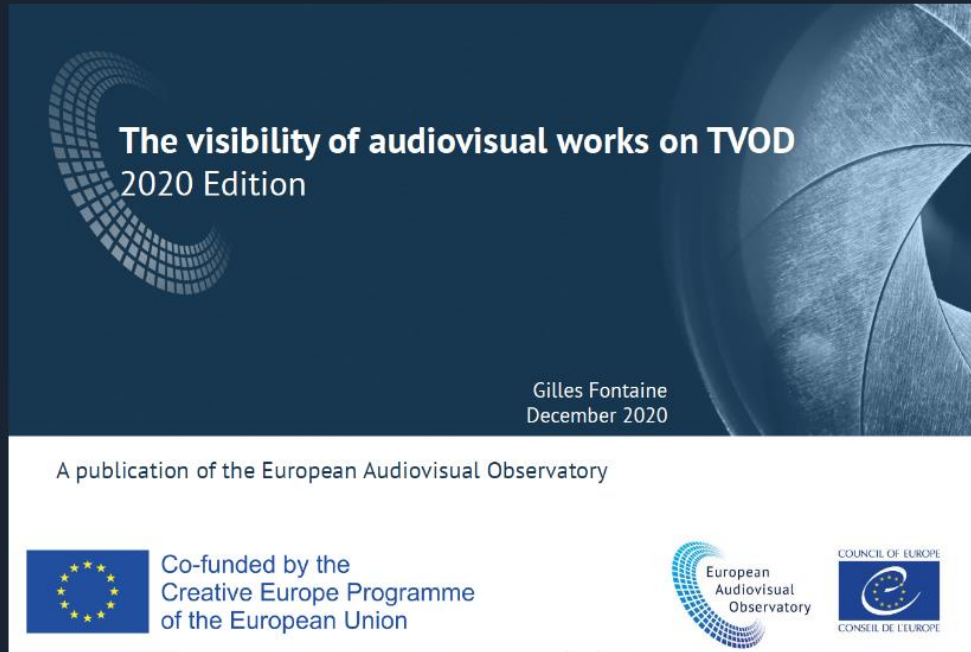






Prezi

Visibility of European content



6th edition in 2020

Partner AQOA systematically monitors the promotional spots on TVOD services homepages for one month.

57 TVOD services from 7 EU27 countries monitored: BE, DE, ES, FR, IT, NL & PL
Plus the UK

Trends in the VOD market



1st edition in 2021

Main figures on the paid VOD market in EU28

Content offer on SVOD and TVOD in EU27 in 2020

Advertising-financed VOD market

SVOD, TVOD, AVOD, BVOD

From cinemas to VOD

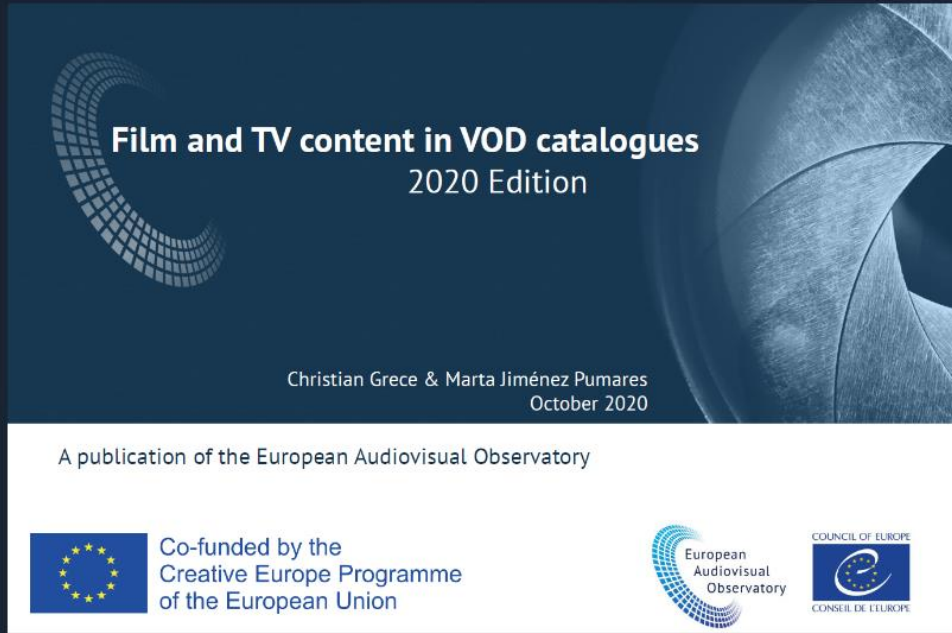


1st edition in 2020

The note builds on the cross-analysis of two datasets:

- **Lumiere** database of films released in cinemas in EU28 (1996-2019)
- 330 VOD services catalogues from **Lumiere VOD** database (May 2020)

VOD catalogues analysis



2020: 1st edition after **Brexit**

2nd edition looking at both Film and TV content in parallel

Numerous previous versions of either Film or TV content VOD catalogues analysis, with evolving data providers and sources.

Let's see the main findings...

Content of the presentation

A – The European Audiovisual Observatory

Who we are, what we do

How we do it: background of the report

B – Film and TV content in VOD catalogues in Europe – 2020 Edition

Methodology

Main findings

Methodology

Definitions

- Services (Amazon) and catalogues (Amazon DE)
- Film: includes documentary, animation
- TV content: includes non-fiction
- Titles, **seasons** and episodes
- Unique vs Cumulated
- Country of origin / Regions of origin (EU27 & **UK**)

Scope

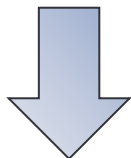
- Contents of VOD catalogues in **EU27** since 2020
- Film: 138 TVOD catalogues in 27 countries and 185 SVOD catalogues in 20 countries
- TV content: 160 SVOD catalogues from 20 countries and 47 TV catalogues from 14 countries
- Data from May 2020

Methodology

Two different datasets

Film

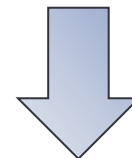
JustWatch
Filmtoro
La Pantalla digital
EUROVOD



Lumiere VOD partners
(film only)

TV content

JustWatch



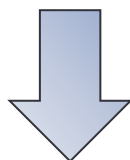
(only source in May 2020
for TV content)

Methodology

Two different business models, analysed separately

TVOD

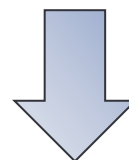
evolution of Home video



centred on **Film**

SVOD

evolution of Pay TV



centred on **TV content**

Methodology

Research questions

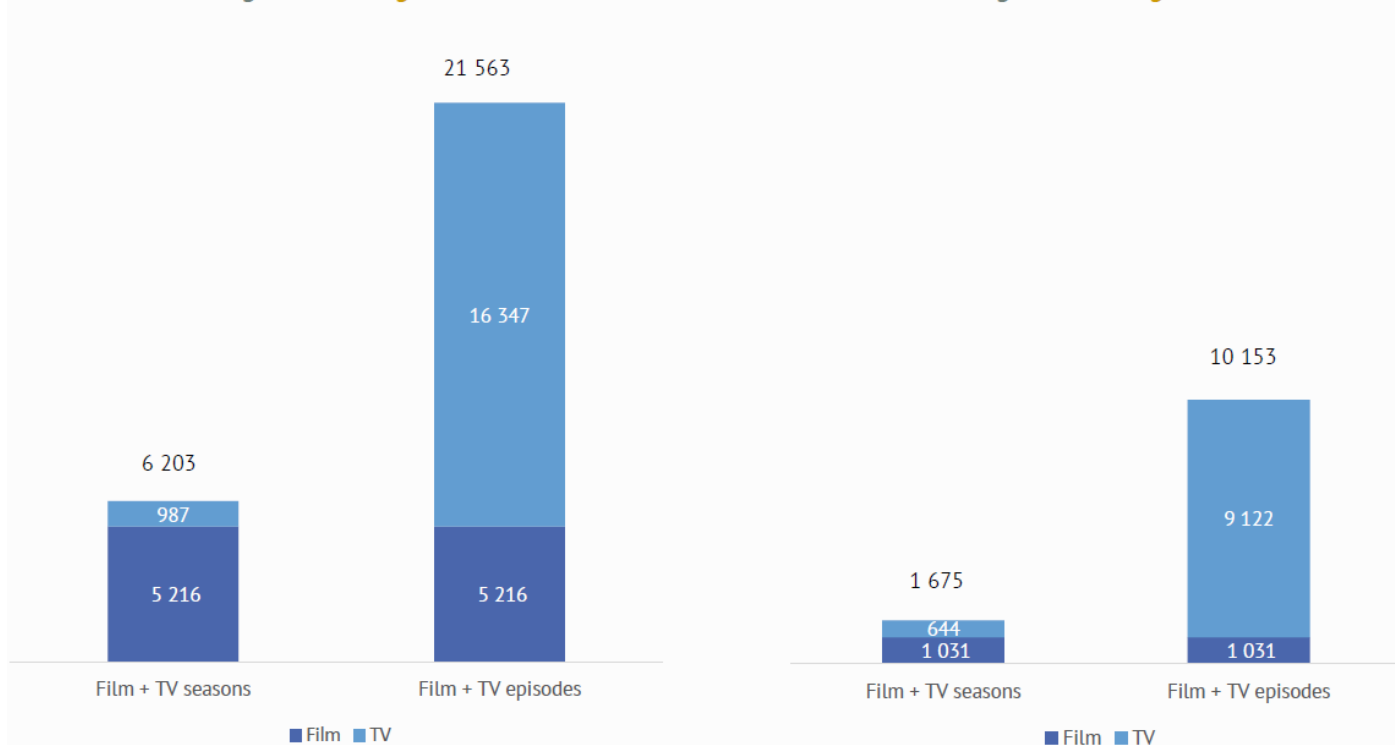
1. Catalogues' average and median **size**
2. Shares by **region** of origin (EU27; EUR OBS; US; Other Intl.)
3. Content **circulation** in average number of services or countries
4. Share of **national** and European **non-national** content
5. Which countries **export** more film and TV content
6. Main **players** by type and available content

Main findings 1 – Size of catalogues

Choice of indicators affects results: more films than seasons, but explosion of episodes

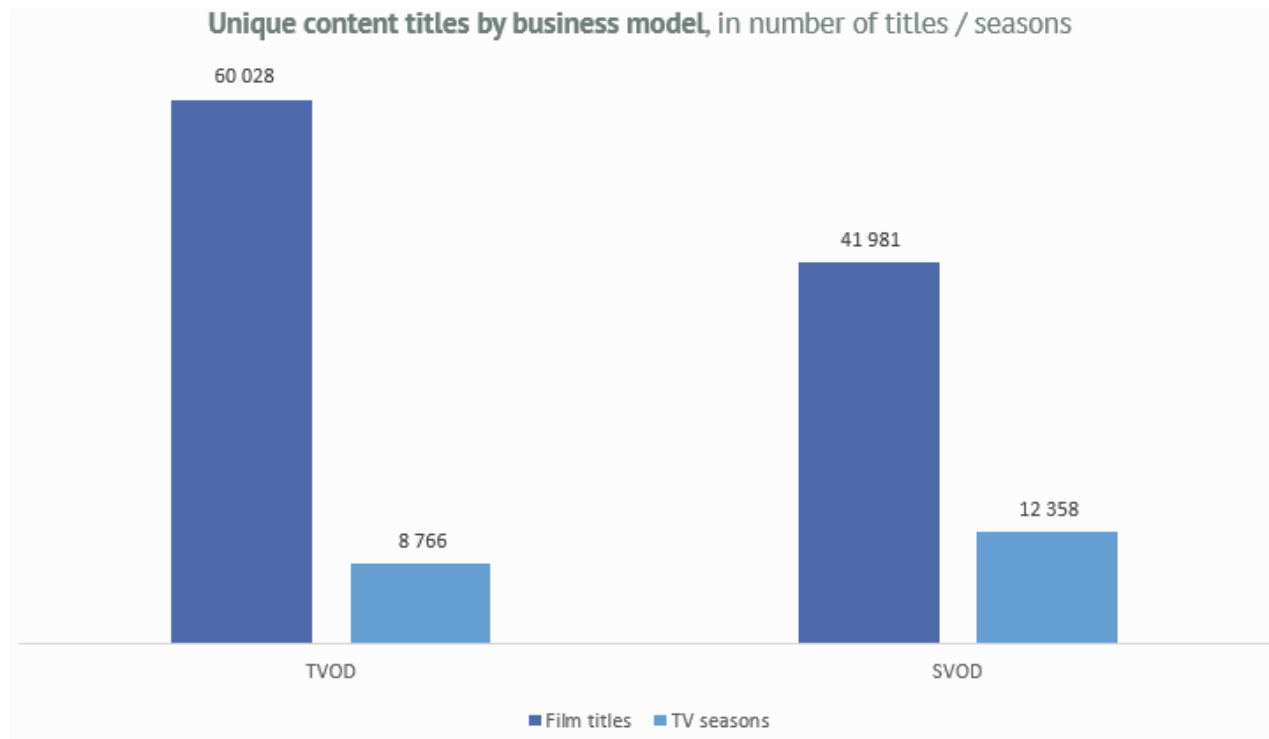
Size of TVOD catalogues in **average** number of content

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



Main findings 1 – Size of catalogues

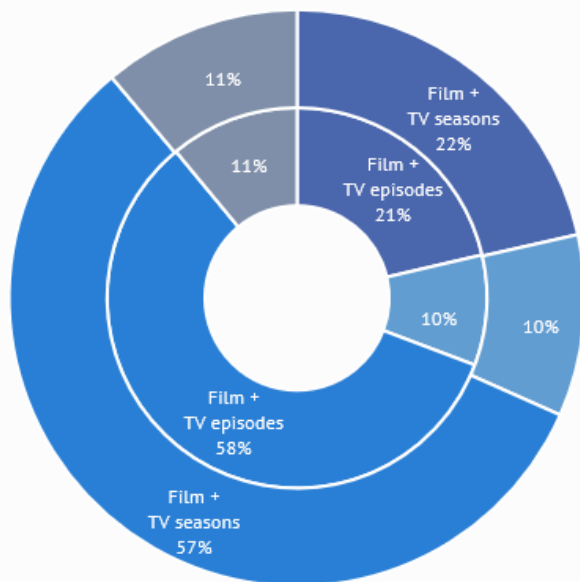
The offer of unique film titles was 7 times higher than of unique TV seasons on TVOD



Main findings 2 – Regions of origin (all CUM)

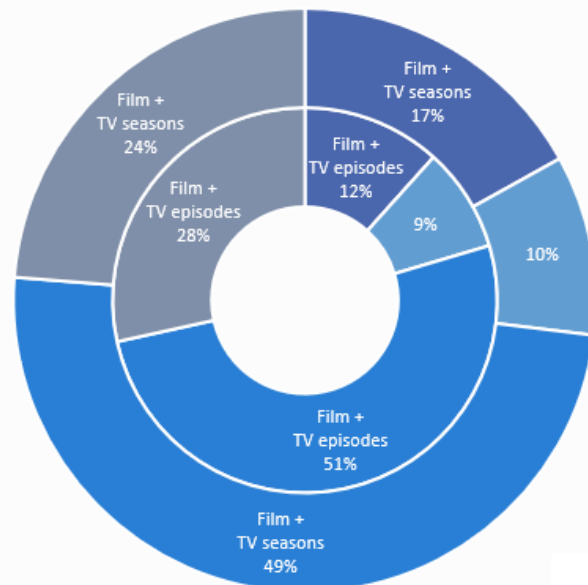
European series are shorter in number of **episodes** than US or international series
After **Brexit**, British content moved to Obs category, decreasing EU shares by 8% in average

Origin of Film and TV seasons or episodes found on TVOD



■ EU27 ■ EUR OBS ■ US ■ Other intl.

Origin of Film and TV seasons or episodes found on SVOD

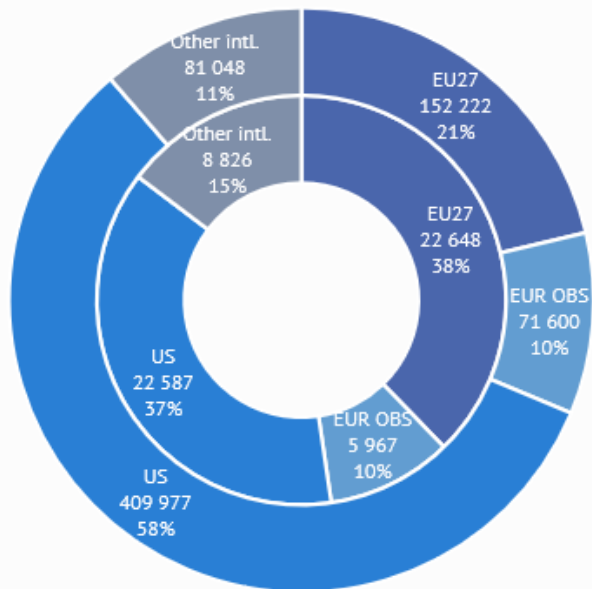


■ EU27 ■ EUR OBS ■ US ■ Other intl.

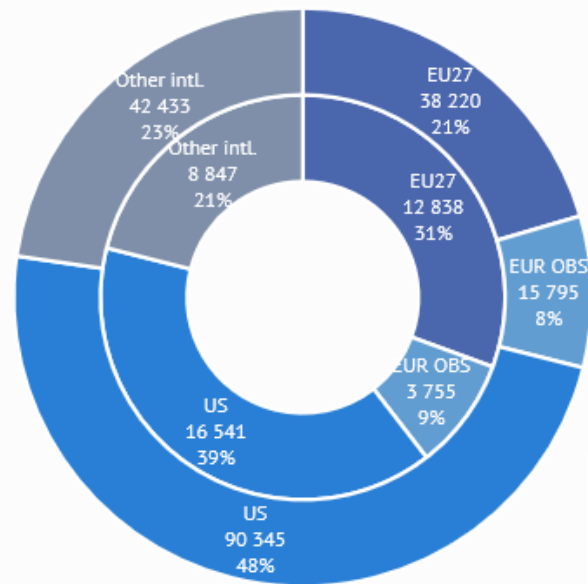
Main findings 2 – Regions of origin: Film

There are more **unique** European than US film titles, both on TVOD and on SVOD
On TVOD, US unique film titles (37%) provide almost 60% of all **cumulated** film titles

Origin of Unique vs Cumulated Film titles found on TVOD



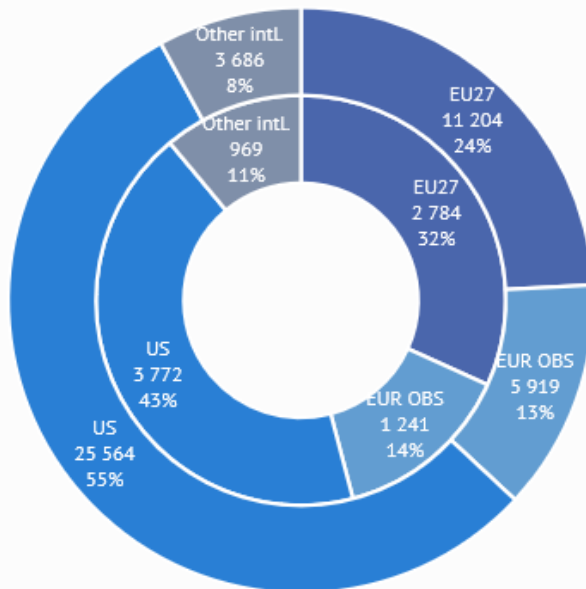
Origin of Unique vs Cumulated Film titles found on SVOD



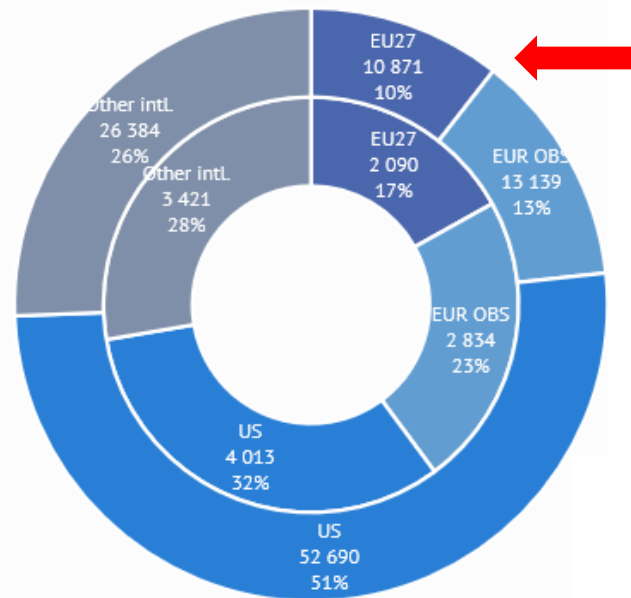
Main findings 2 – Regions of origin: TV content

There are more **unique** European TV seasons than US, both on TVOD and on SVOD
On SVOD, US unique TV seasons (32%) provide 51% of total **cumulated** TV seasons
There is more cumulated TV content from other origins (Asia, Canada) than from Europe

Origin of Unique vs Cumulated TV seasons found on TVOD



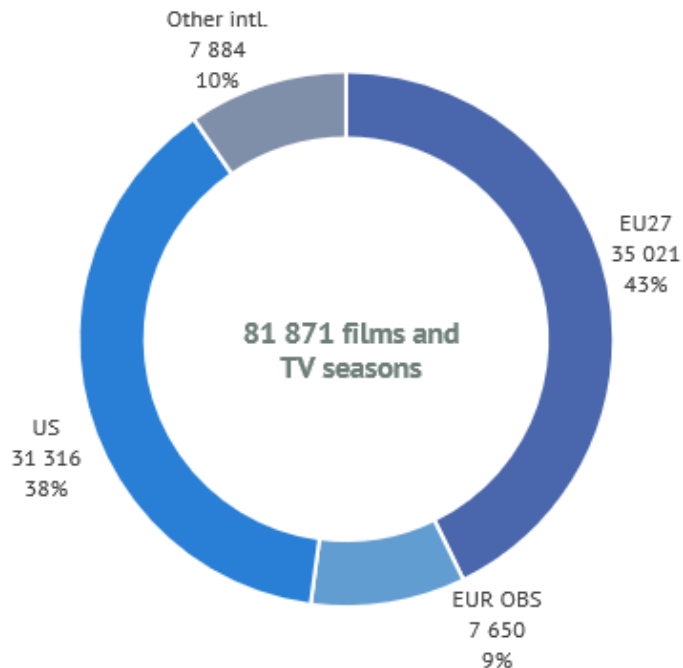
Origin of Unique vs Cumulated TV seasons found on SVOD



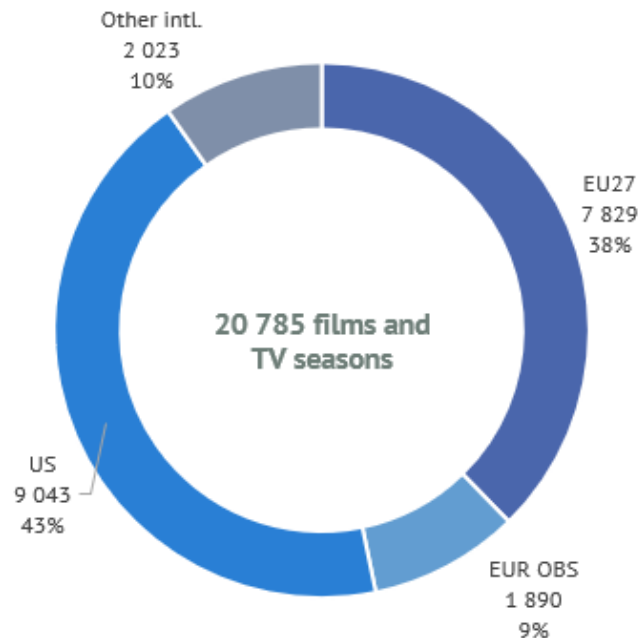
Main findings 2 – Origin in national VOD

National VOD services show a larger proportion of European content

Origin of content in national TVOD catalogues



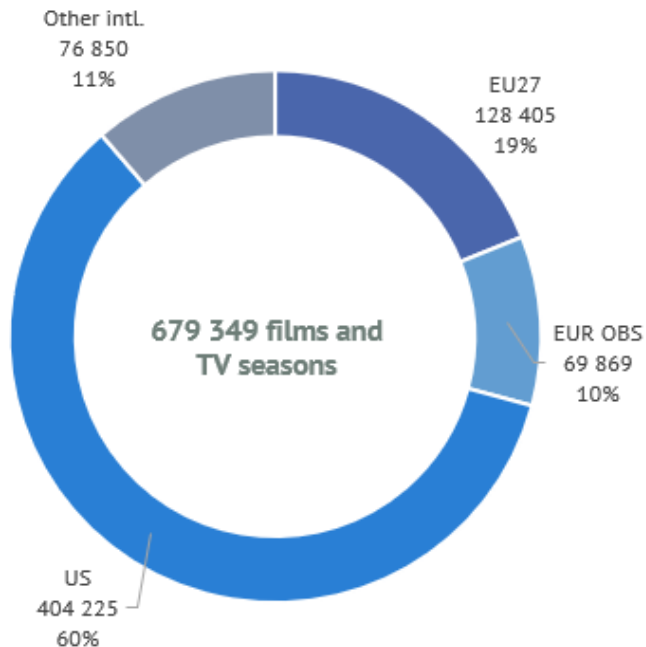
Origin of content in national SVOD catalogues



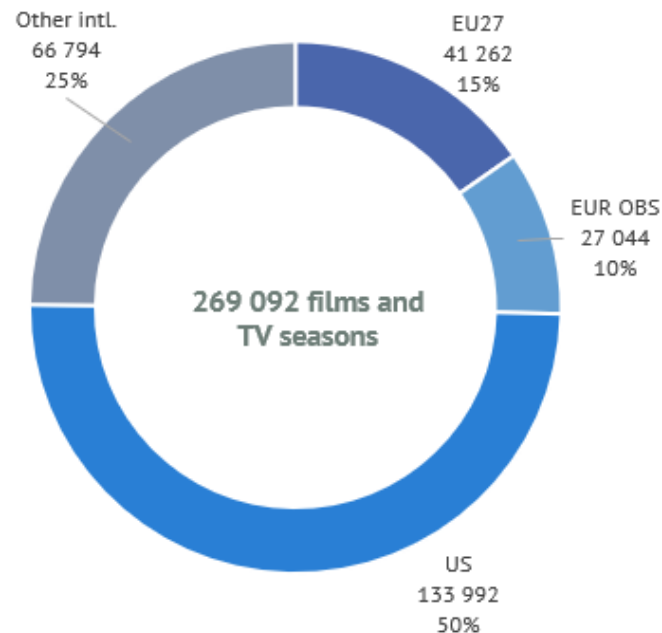
Main findings 2 – Origin in pan-European VOD

While multi-country services rely more on US content (60% on TVOD)
SVOD multi-country services offer the largest amount of other international content

Origin of content in multi-country TVOD catalogues



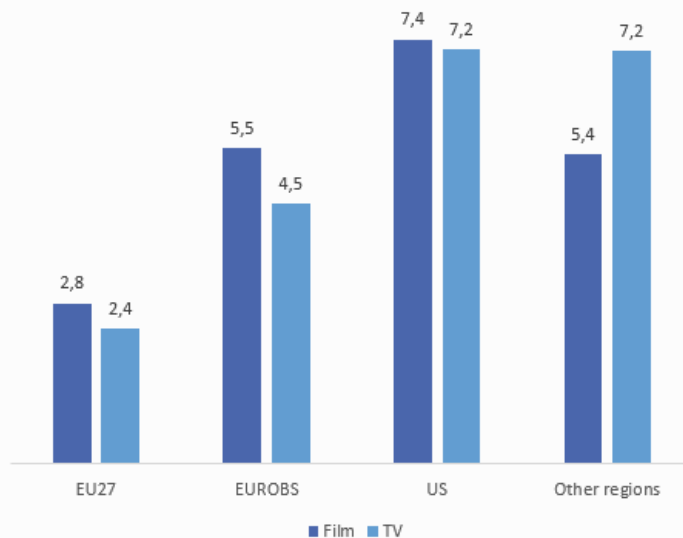
Origin of content in multi-country SVOD catalogues



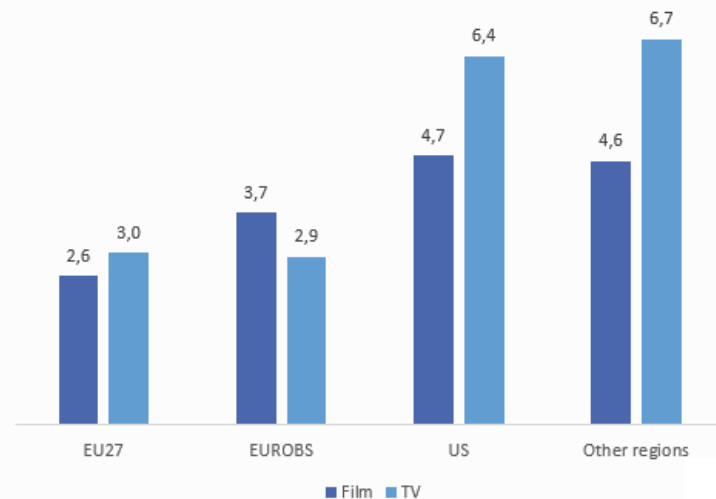
Main findings 3 – Content circulation

Unique film titles circulated better on TVOD and unique TV seasons, on SVOD
Content from US and other regions travelled best, crossing borders more easily than EU27

Circulation on TVOD by number of countries



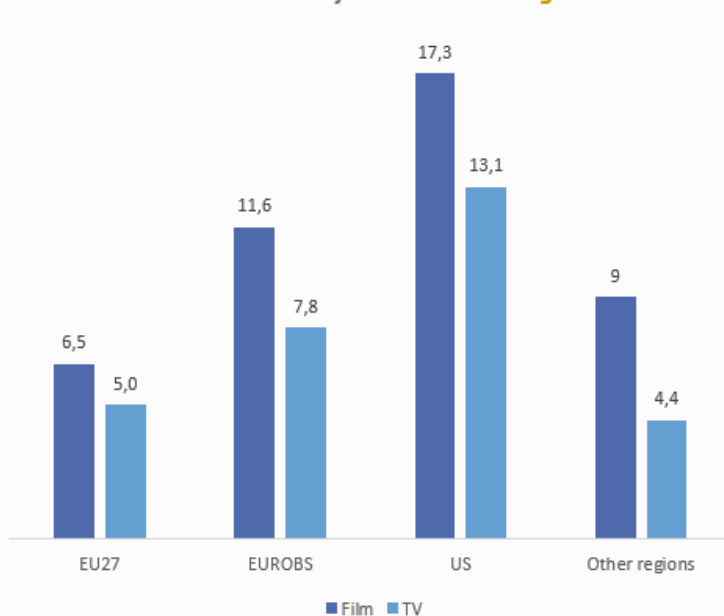
Circulation on SVOD by number of countries



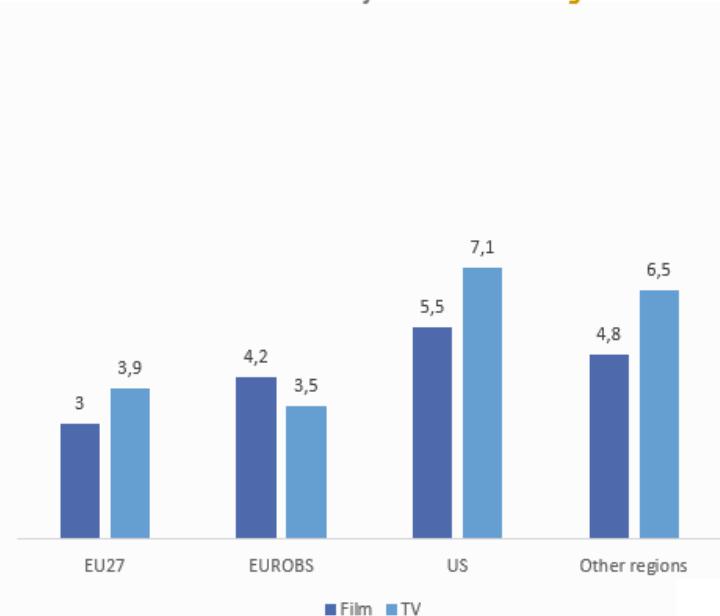
Main findings 3 – Content circulation

On TVOD, non-EU European content (incl. the UK) showed the second best circulation, On SVOD, the second best circulation in catalogues was from regions outside of Europe or US

Circulation on TVOD by number of catalogues



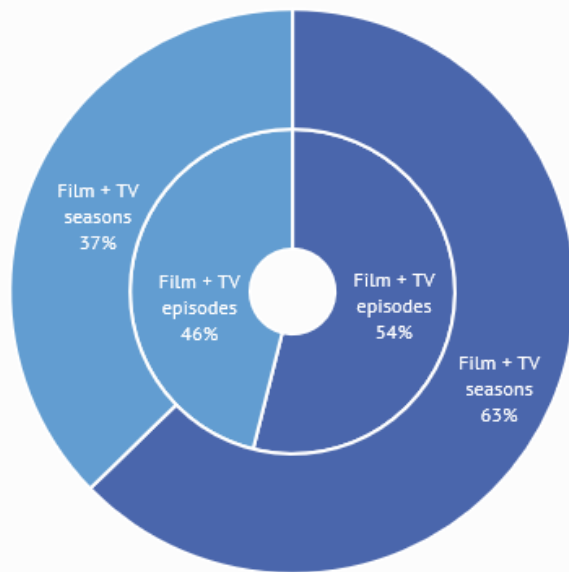
Circulation on SVOD by number of catalogues



Main findings 4 – National and other EU

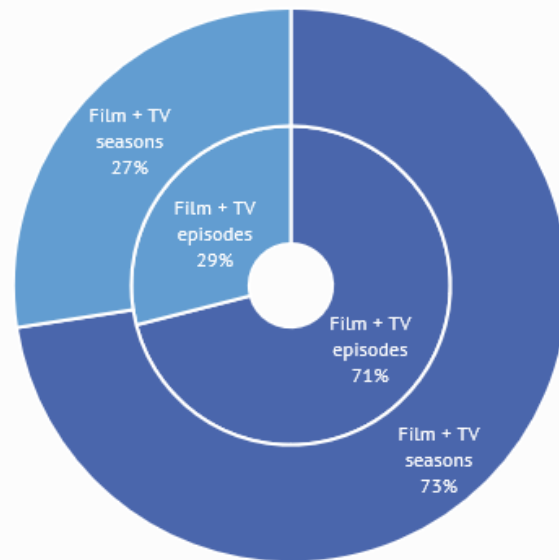
EU27 non-national content represented the largest share, especially on SVOD (72%)
Highest share of national content found on films and TV episodes on TVOD

Share of EU non-national and national content on TVOD



■ EU non-national ■ National

Share of EU non-national and national content on SVOD

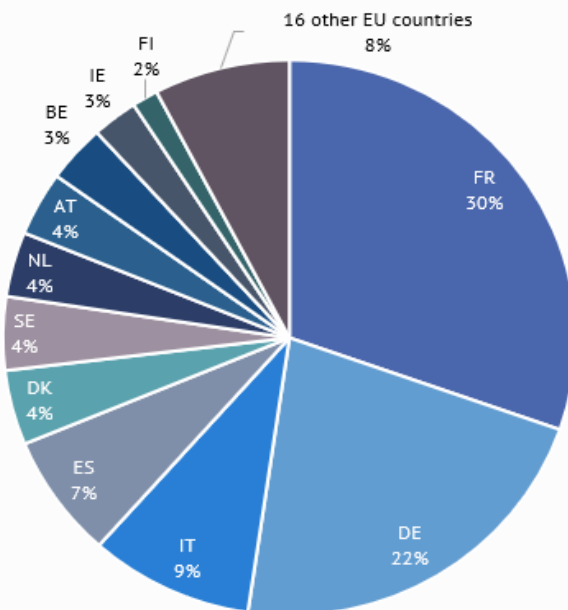


■ EU non-national ■ National

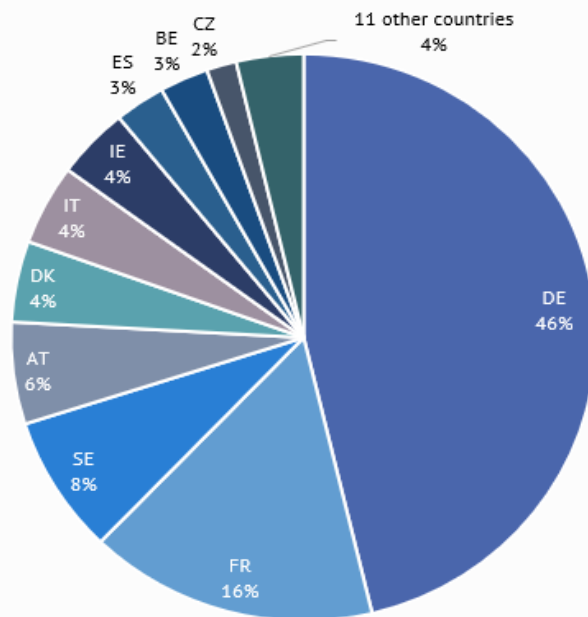
Main findings 5 – Exporting countries: TVOD

Films on TVOD are mainly French and German; 4 main producers on top
TV content is mainly German on TVOD, followed by French and Nordic content

Origin of EU27 non-national film titles on TVOD



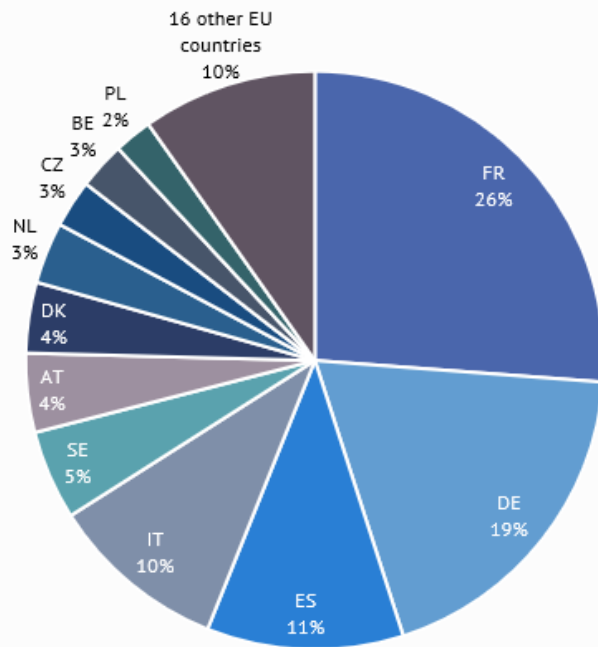
Origin of EU27 non-national TV seasons on TVOD



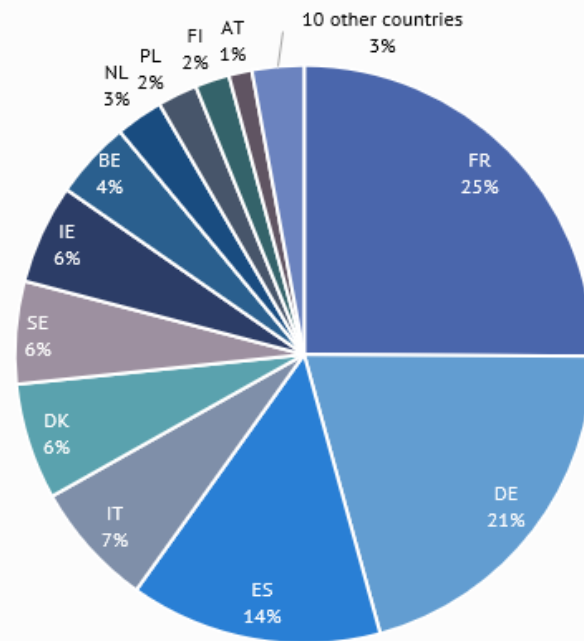
Main findings 5 – Exporting countries: SVOD

On SVOD, the most exported titles, for both films and TV seasons, were French (25%) German, Spanish and Italian titles complete the top EU-4 export countries (two thirds)

Origin of EU non-national film titles on SVOD



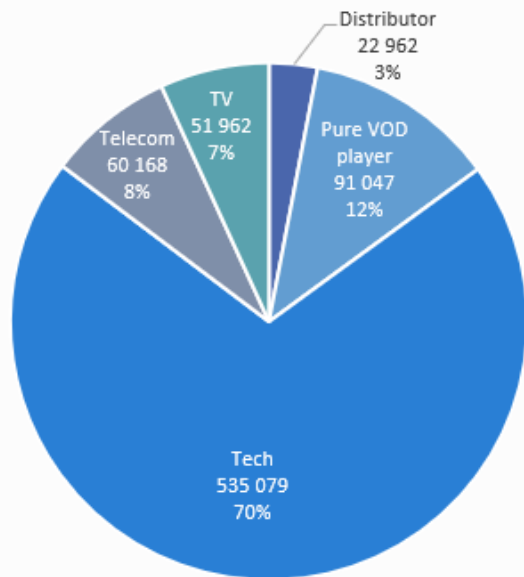
Origin of EU non-national TV seasons on SVOD



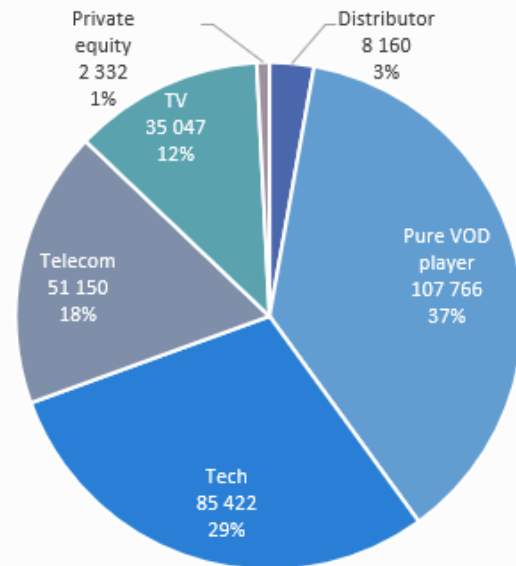
Main findings 6 – Players in EU27 VOD

Over 80% of the works available on TVOD are offered by tech and pure VOD players
TV and Telecom players made up 30% of the content offer on SVOD and 15% on TVOD

TVOD – Films and TV seasons in catalogues



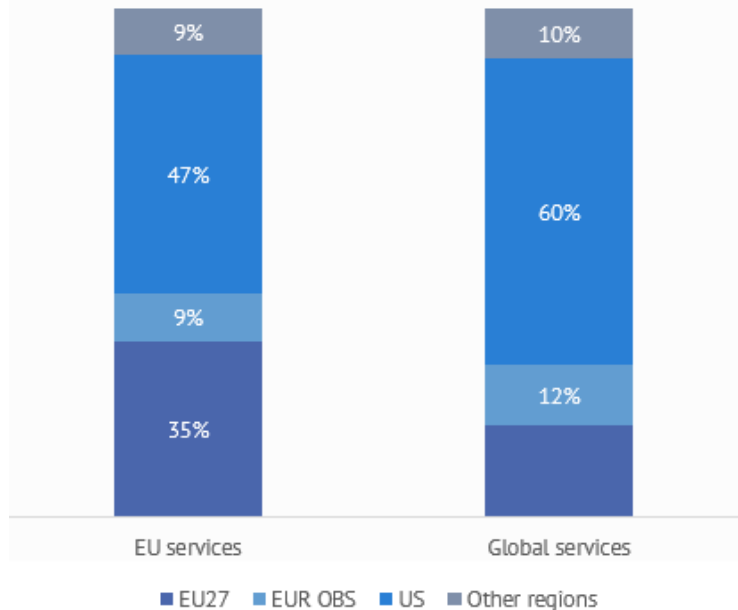
SVOD – Films and TV seasons in catalogues



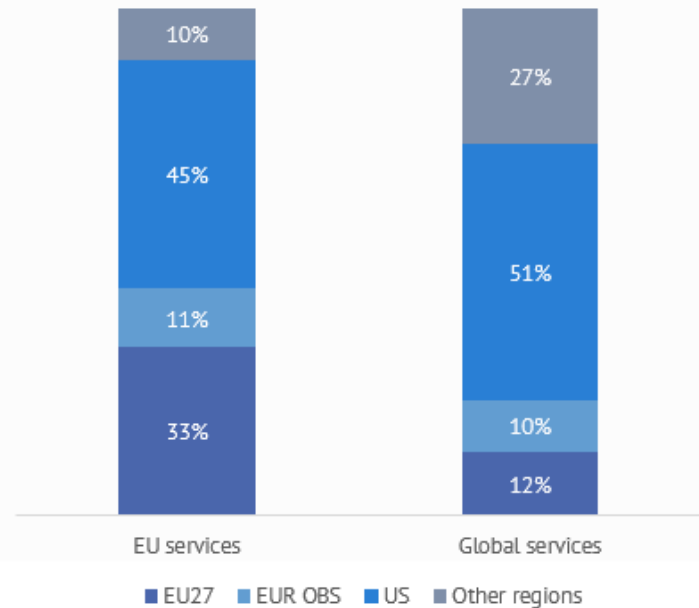
Main findings 6 – Players in EU27 VOD

European-owned VOD services offer a bigger proportion of European content
SVOD global services offer more content from other regions (Asia, Canada, Australia)

TVOD – Share of content by origin of service owner



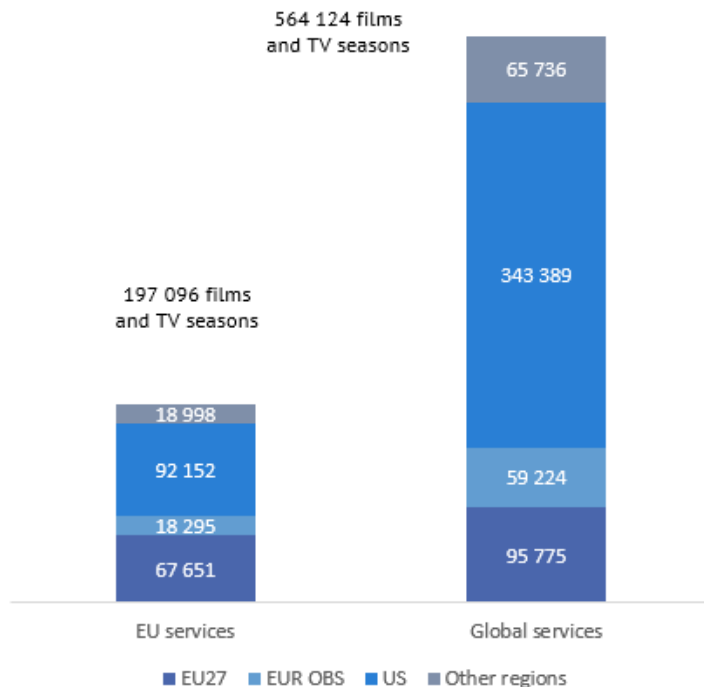
SVOD – Share of content by origin of service owner



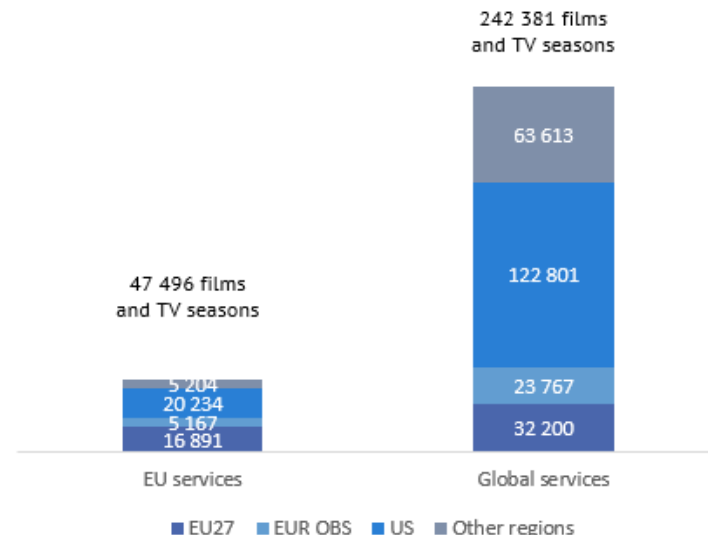
Main findings 6 – Players in EU27 VOD

But in absolute numbers, global services offered more films and TV seasons and thus also more European content than EU owned services

TVOD – Number of films by origin of service owner



SVOD – Number of films by origin of service owner



Thank you!

marta.jimenez-pumares@coe.int

