

The export of European films on SVOD services outside Europe

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Overview of 79 SVOD services in 21 countries worldwide

Analysis by region and country

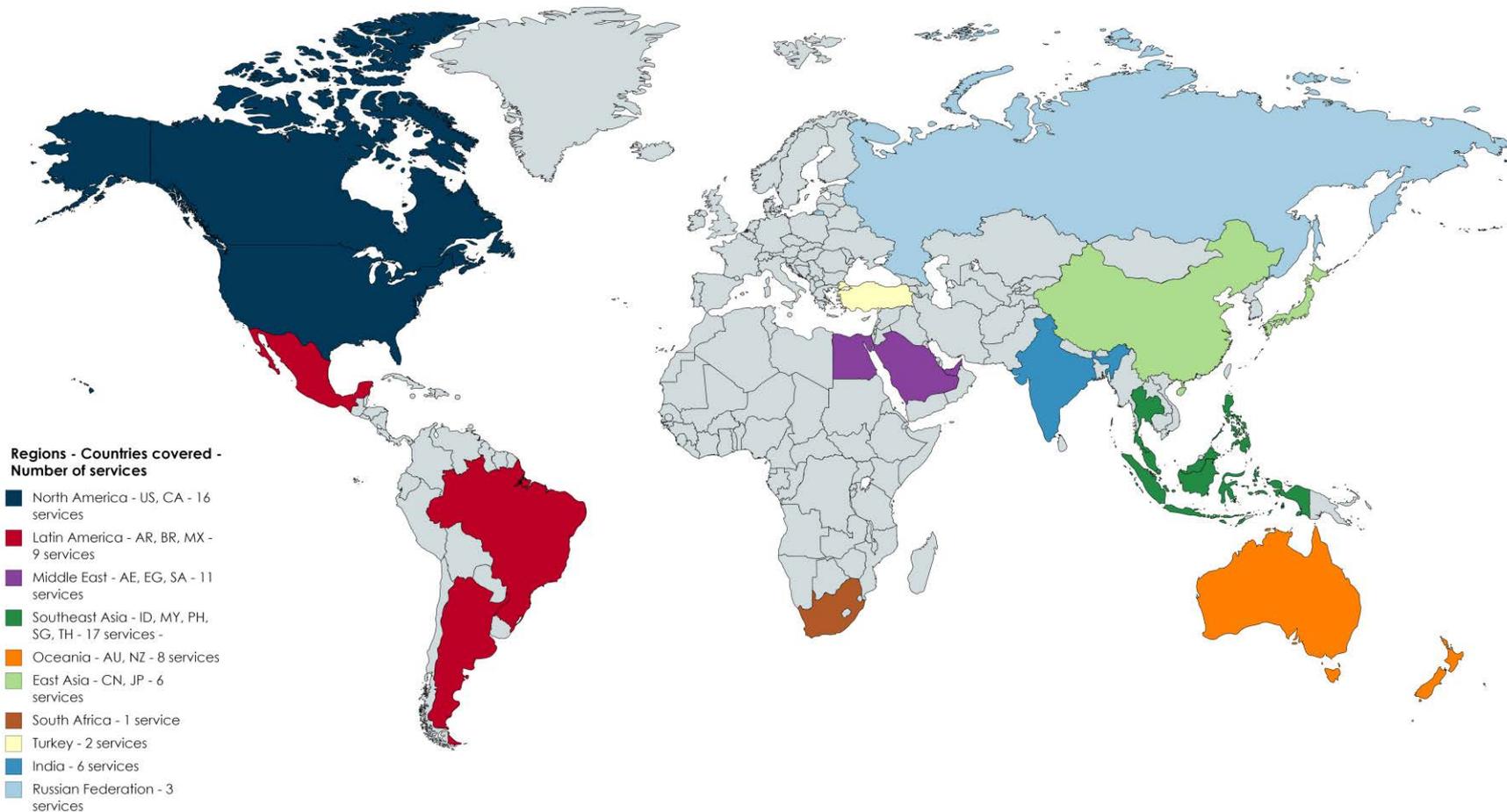
- North America – Canada and USA
- Latin America – Argentina, Brazil and Mexico
- South East Asia – Indonesia, Malaysia, Philippines, Singapore and Thailand
- East Asia – China and Japan
- India
- Oceania – Australia and New Zealand
- Middle East – The United Arab Emirates, Egypt and Saudi Arabia
- Individual countries - Russian Federation, South Africa and Turkey

- ▶ The aim of this report is to give a picture on the export of EU films on SVOD services outside of the European Union. 79 SVOD services in 21 countries worldwide are part of the sample.
- ▶ The report looks at the circulation of unique film titles and the volume/occurrences of films available on these services, on a regional and service basis.
- ▶ The first part gives a snapshot of the availability of EU films around the globe after which a overview for each region is provided.

Methodology

- ▶ The analysis has been carried out based on data provided by Ampere Analysis and comprehends SVOD catalogue data collected in June 2019.
- ▶ A film is defined as a feature film, fiction film, documentary or other film content available in the “Film” / “Movie” section of the SVOD catalogues part of the sample.
- ▶ For the origin of a film, only the first country of production is taken into account. The production countries are based on data collected from the Observatory’s LUMIERE database on admissions to films in Europe, IMDb and the Movie database. Minority co-productions which might have been of EU origin through agreements are not taken into account.
- ▶ The shares included in this report are only indicative and minor identification errors might have occurred.
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Overview of 10 regions and 21 countries worldwide



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Overview of 79 SVOD services by region and country

North America	Southeast Asia	Middle East	Latin America	Australia & New Zealand
Amazon Prime Video CA	Amazon Prime Video MY	Amazon Prime Video AE	Amazon Prime Video BR	Amazon Prime Video AU
Amazon Prime Video US	Amazon Prime Video SG	Amazon Prime Video EG	Amazon Prime Video MX	Amazon Prime Video NZ
Britbox CA	HBO GO SG	Netflix AE	Claro Video AR	Foxtel Now AU
Britbox US	Hooq ID	Netflix EG	Claro Video BR	Lightbox NZ
CBS All Access US	Hooq PH	Netflix SA	Claro Video MX	Neon NZ
CraveTV CA	Hooq SG	Starz Play AE	HBO GO BR	Netflix AU
HBO GO US	Hooq TH	Starz Play EG	Netflix AR	Netflix NZ
Hotstar CA	Netflix ID	Starz Play SA	Netflix BR	Stan AU
Hotstar US	Netflix MY	Wavo AE	Netflix MX	
Hulu US	Netflix PH	Wavo EG		
Netflix CA	Netflix SG	Wavo SA		
Netflix US	Netflix TH			
Showtime Anytime US	Viu ID			
Starz Play US	Viu MY			
Sundance Now CA	Viu PH			
Super Channel CA	Viu SG			
	Viu TH			
China & Japan	India	Russia	Turkey	South Africa
Amazon Prime Video JP	Amazon Prime Video IN	Amazon Prime Video RU	Amazon Prime Video TR	Netflix ZA
Hulu JP	Eros Now IN	Ivi RU	Netflix TR	
iQiyi CN	Hooq IN	Netflix RU		
Netflix JP	Hotstar IN			
Tencent Video CN	Netflix IN			
Youku CN	Viu IN			

Key findings on the export of EU films on SVOD services

EU films – Dominance of a few export countries but medium film producing countries manage to export several film titles

- ▶ The majority of EU films found on SVOD services around the world are produced in EU-5. The United Kingdom is, by far, the biggest supplier of EU films with 38% of all unique EU titles, followed by France with 18%, Germany with 12%, Italy with 11% and Spain with 6%. Together, these 5 countries account for 85% of all unique EU film titles.
- ▶ However, medium size film producing countries, with diversified filmographies (Belgium, the Netherlands, Austria), special genres (e.g. Nordic noir), or English-speaking (Ireland), manage also to export films outside of Europe. These 7 countries account for 11% of all unique film titles found in the SVOD catalogues analysed.
- ▶ For the rest of EU countries, exporting their film production to other world regions remains difficult and often is dependent on being picked up by a global SVOD service, operating in Europe such as Netflix and Amazon.

Key findings on the export of EU films on SVOD services

EU films – Diverse regions and SVOD services are the biggest buyers of EU film titles

- ▶ North America (16 services) and China (3 services) have the largest number of unique EU film titles with respectively 4 095 and 2 585 unique EU titles.
- ▶ Russia (3 services) and Australia & New Zealand (8 services) are other regions with an above average number of unique EU films titles with respectively 1 813 and 1 644 unique titles.
- ▶ On the other hand, Southeast Asia (17 services) has the lowest amount of unique EU film titles with 761 titles

- ▶ The biggest buyer for EU film titles was Amazon with 3 281 unique titles in its 14 country catalogues, followed by Netflix with 1 816 unique titles for its 20 catalogues
- ▶ Russian service Ivi and the 3 Chinese services Youku, iQiyi, Tencent Video were the biggest single country services acquiring EU films.
- ▶ Indian service Eros Now, Canadian service Sundance Now, Viu (6 countries) and CBS All Access on the other hand had between 31 and 3 unique EU film titles in their catalogues.

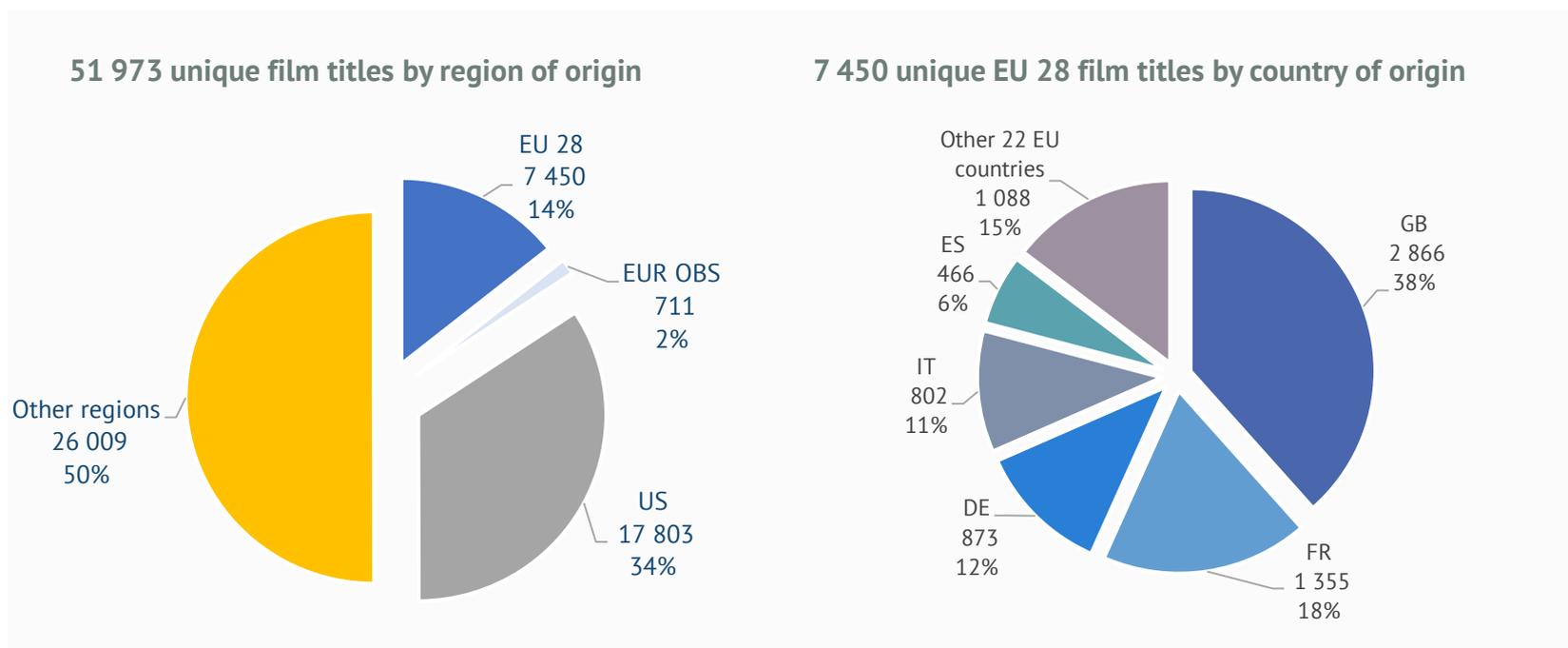
Key findings on the export of EU films on SVOD services

EU films – Export depends on language, cultural and geographical proximity

- ▶ On a regional/country basis, the regions in which the highest share of EU films were found (between 15,4% and 22,4% of all films available) are these with a **cultural/language proximity to the EU** (Latin America, North America, South Africa, Australia & New Zealand) or also a **geographical proximity** (Russian Federation, Turkey).
- ▶ The **Asian and Indian markets remain difficult for EU films** and were the regions with the lowest shares of EU films, often boosted by global players rather than national SVOD services which rely on **regional films for their subscribers**.
- ▶ **Netflix and Amazon, operating in Europe and outside**, are the multi-country services with the **highest share of EU films in their catalogues**, with an average of 18%. They tend to **circulate films acquired in Europe** also to the countries in which they operate outside Europe.
- ▶ British films represent the highest share of EU films in North America, South Africa, India, Southeast Asia, Australia and New Zealand – language/cultural proximity.
- ▶ French films score their highest share of EU films in the Middle East, Turkey and China and Japan – appeal of French cinema high in these regions.
- ▶ Spanish films, without surprise, claim their highest share in Latin America but also Southeast Asia.
- ▶ German films make up a stable percentage of EU films throughout the regions analysed, accounting between 8% and 14%
- ▶ Italian films, mostly classic films, have their highest share in North America with 12%.

EU titles represent 14% of film titles available / EU-5 countries make up 85% of all EU titles

- ▶ 50% of all unique film titles came from regions other than the US, the European Union and Observatory member states.
- ▶ With 7 450 unique film titles, **EU film titles represent 14% of film titles** on offer.
- ▶ The top 5 EU film producing countries represent the lion share of all EU titles with 85%, with British titles almost accounting for 40% of EU film titles available.

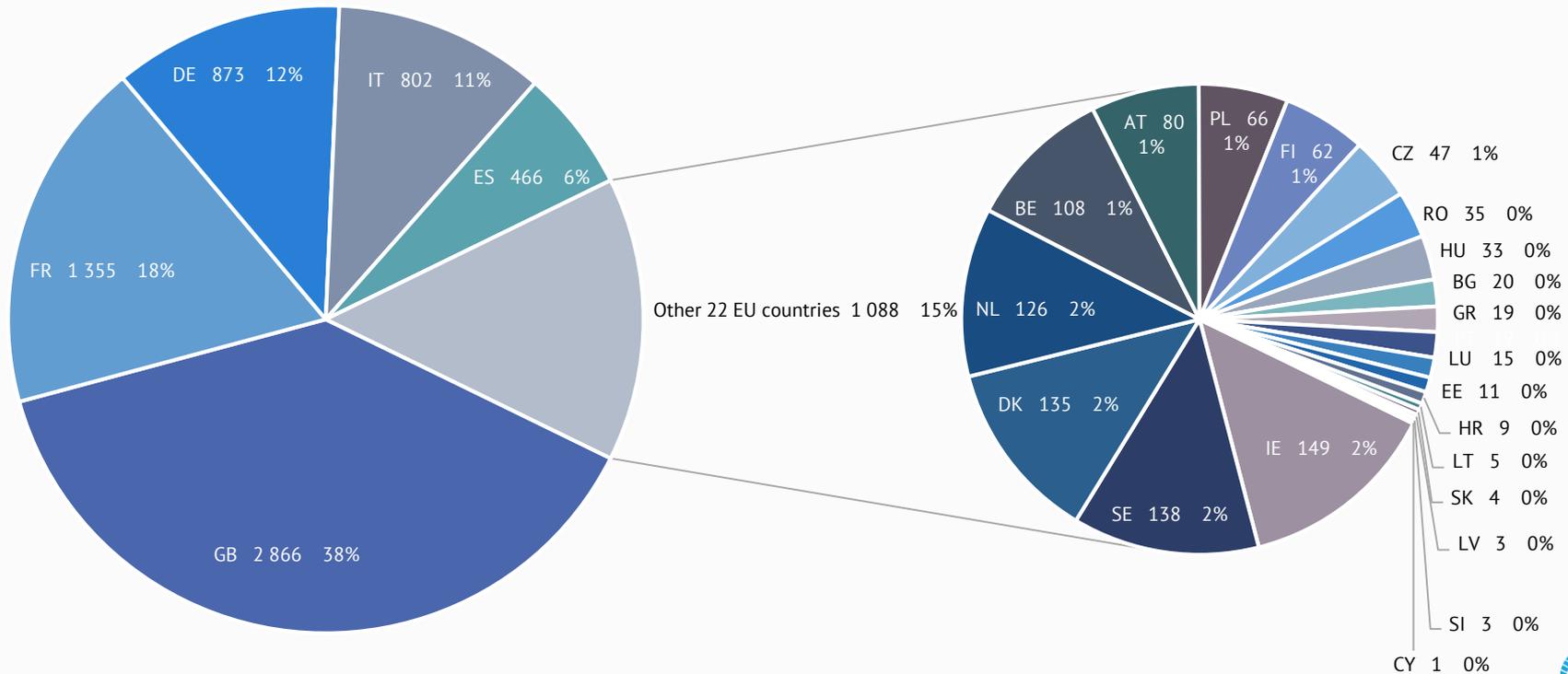


*10 064 unique film titles could not be identified, mostly film titles from the region in consideration and film titles written in local languages which did not figure in film databases such as IMDb, LUMIERE, TMDB. These unidentified film titles represented 16% of all unique film titles from the catalogues and have not been included in the analysis.

Medium film producing countries account for the rest of EU film titles available

- ▶ EU-5 represent 85% of all EU films and while 8 medium size film producing countries account for 11% of all film titles.
- ▶ The other 14 EU countries export a rather **small amount of film titles**

7 450 unique of EU film titles by country of origin



Number of unique titles by EU country of origin and most present titles on services and in countries

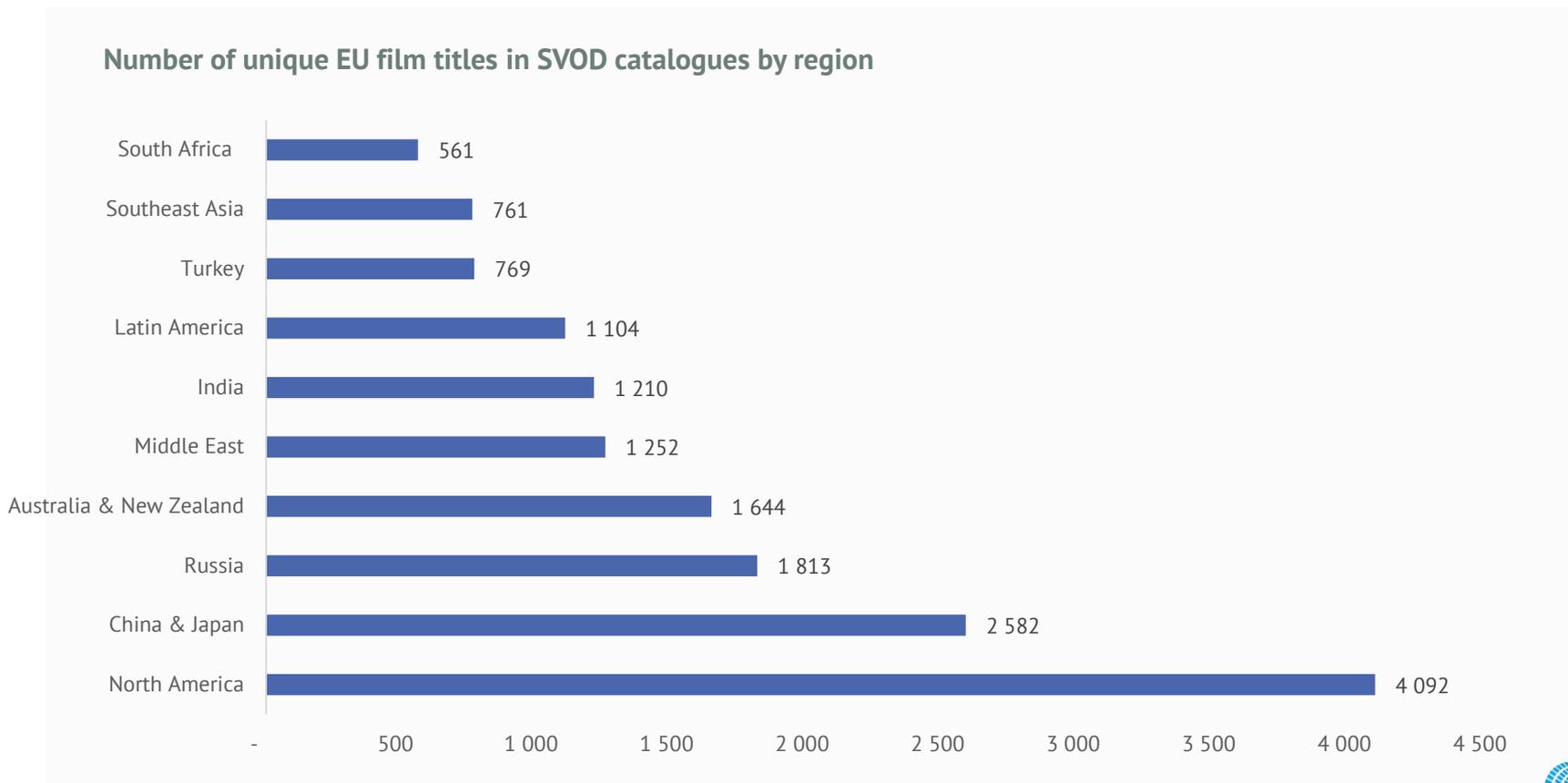
- ▶ When EU-5 countries are taken out of the total of EU unique titles, **8 countries represent the major part with 80% of the remaining EU film titles** – Nordics, IE, NL, BE, AT and PL.

Country	Number of unique titles	Film title most present (on services)	Film title most present (in countries)
GB	2 866	Love Actually - 2003 - GB,US (27)	Under the Shadow - 2016 - GB (21)*
FR	1 355	Braqueurs - 2015 - FR (21)*	Jour J - 2017 - FR - (20)
DE	873	Colonia - 2015 - DE,FR,LU (23)	Dream Boat - 2017 - DE (20)*
IT	802	Le meraviglie - 2014 - IT,CH,DE (23)	Le meraviglie - 2014 - IT,CH,DE (20)*
ES	466	El bar - 2017 - ES,AR (23)	Contratiempo - 2016 - ES (21)*
IE	149	The Siege of Jadotville - 2016 -IE (20)	The Siege of Jadotville - 2016 -IE (20)
SE	138	Jag älskar dig - En skilsmässokomedi - 2016 - SE (23)	Cirkeln - 2015 - SE (20)*
DK	135	Lykke-Per - 2018 - DK (20)*	Sommeren '92 - 2015 - DK,GB (20)*
NL	126	Strike a Pose - 2016 - NL, BE (20)	Bon Bini Holland - 2015 - NL (19)
BE	108	Belgica - 2016 - BE,FR (18)	Belgica - 2016 - BE,FR (18)
AT	80	Der Prozess - 2011 - AT (26)	Weapon of Choice - 2018 - AT,IQ,US (20)
PL	66	Sztuka kochania. Historia Michaliny Wislockiej - 2017 - PL (19)	Sztuka kochania. Historia Michaliny Wislockiej - 2017 - PL (19)
FI	62	Tulen morsian - 2016 - FI,SE,NO,LV (17)	Tulen morsian - 2016 - FI,SE,NO,LV (17)
CZ	47	Lída Baarová - 2016 - CZ,SK (19)	Milada - 2017 - CZ,US (19)
RO	35	Fire & Ice - 2008 - RO (6)	Fire & Ice - 2008 - RO (5)
HU	33	The Basement - 2017 - HU,US,CA (9)	The Basement - 2017 - HU,US,CA (9)
BG	20	Bullethead - 2017 - BG,US (19)	Bullethead - 2017 - BG,US (19)
GR	19	O Theos agapai to haviari - 2012 - GR,RU (6)	O Theos agapai to haviari - 2012 - GR,RU (6)
PT	19	Tabu - 2012 - PT, DE, FR (4)	Backlight - 2010 - PT,US (3)*
LU	15	Belle du Seigneur - 2012 - LU,FR,DE,BE (3)	Belle du Seigneur - 2012 - LU,FR,DE,BE (3)
EE	11	Sangarid - 2017 - EE,FI,LV (2)*	Mandariinid - 2013 - EE,GE (2)*
HR	9	Ti mene nosis - 2015 - HR,SI,CS,SL (19)	Ti mene nosis - 2015 - HR,SI,CS,SL (19)
LT	5	Losejas - 2013 - LT,LV (3)	Losejas - 2013 - LT,LV (3)
SK	4	Spina - 2017 - SK,CZ (1)	Spina - 2017 - SK,CZ (1)
LV	3	Es esmu seit - 2016 - LV (1)*	Golfstrim pod aysbergom - 2012 - LV,RU,MT,AT (1)*
SI	3	Houston, We Have a Problem! - 2016 - SI, HR, DE, CZ, QA (18)	Houston, We Have a Problem! - 2016 - SI, HR, DE, CZ, QA (18)
CY	1	Committed - 2014 - CY (4)	Committed - 2014 - CY (4)

* Several titles are present in the same number of countries or on services. In this case, the title with the highest admission in European cinemas, based on LUMIERE data, has been taken, and in the case no admissions figure are available, the most recent title.

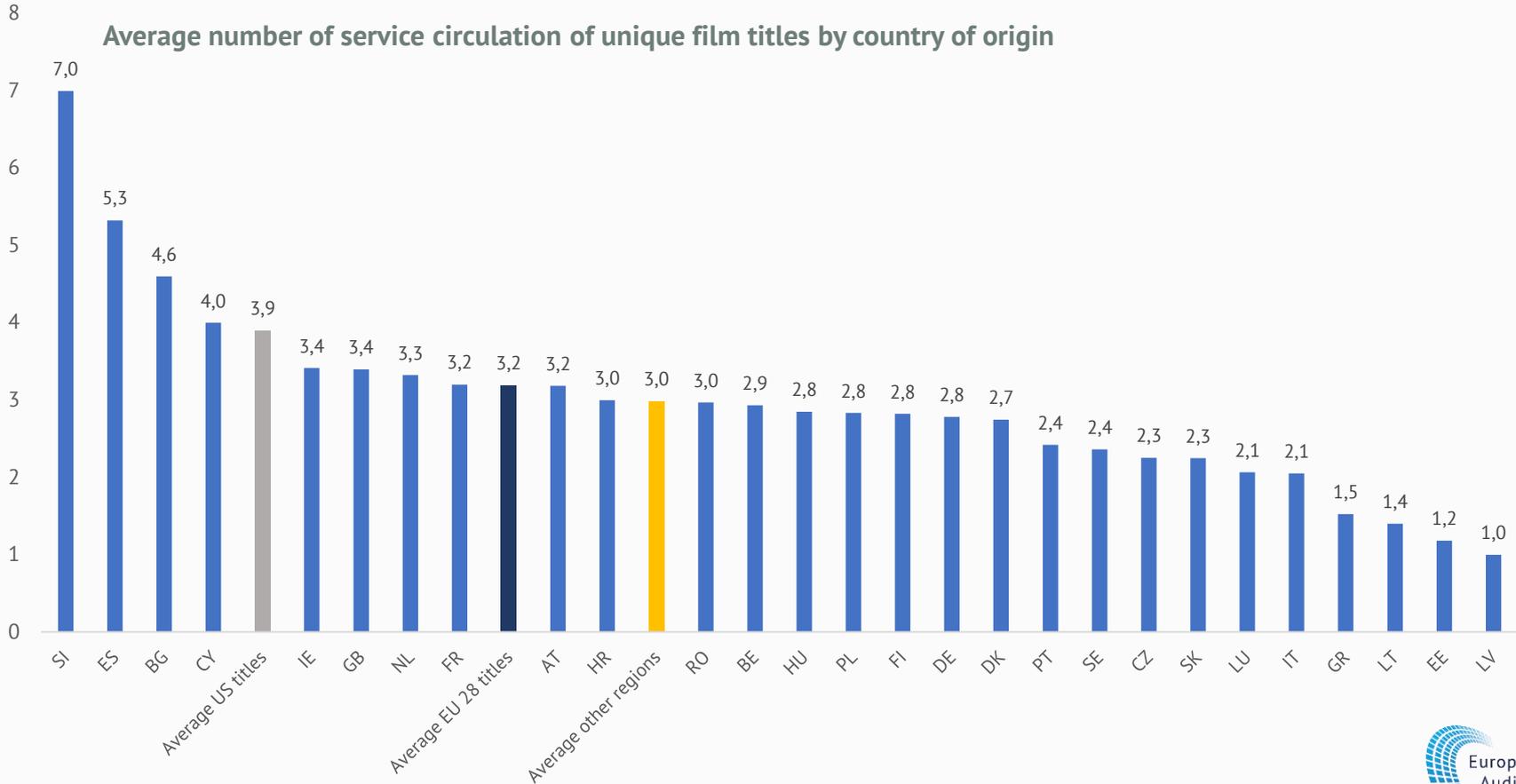
Which regions are the biggest buyers of EU films?

- ▶ North America and China are by far the biggest export markets for EU films if unique titles are considered.
- ▶ Latin America, India, the Middle East, Russia and Oceania are also significant export markets for EU titles.
- ▶ Southeast Asia, by number of services, has the lowest amount of unique EU titles in films catalogues and could be an export opportunity for EU films on SVOD services.



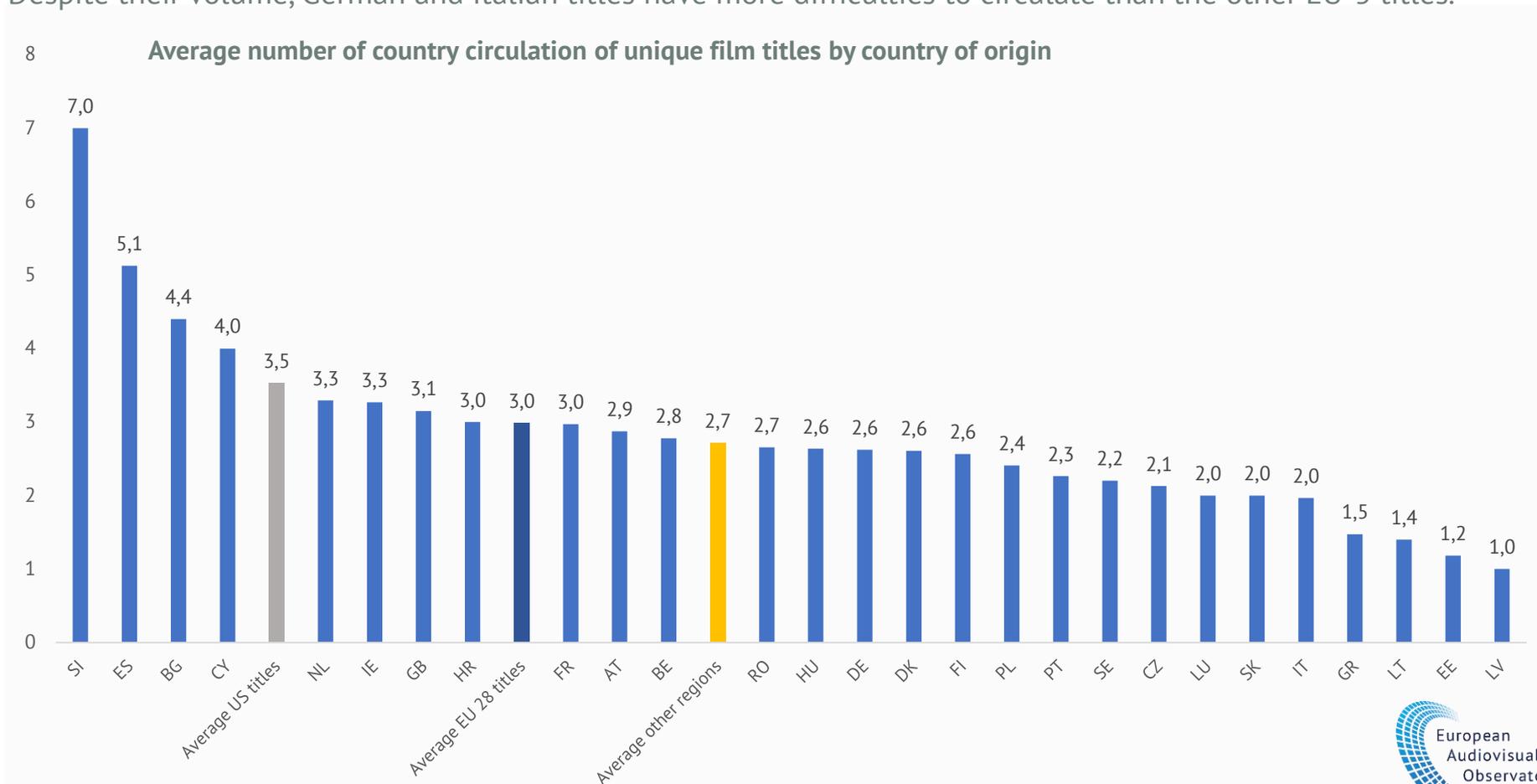
Circulation - Average number of service circulation (total 79) of EU unique titles

- ▶ For EU-5 titles, even if they represent the lowest number of unique titles available, **Spanish titles tend to circulate better on services**, followed by British and French titles.
- ▶ On the other hand, German and Italian titles circulate less better even if the volume of titles is important.
- ▶ Titles from 19 EU countries are below the EU average of service circulation.
- ▶ On average, EU titles are available on 3.2 SVOD services out of the 79 in the service sample.



Circulation - Average number of country circulation (total 21) of EU unique titles

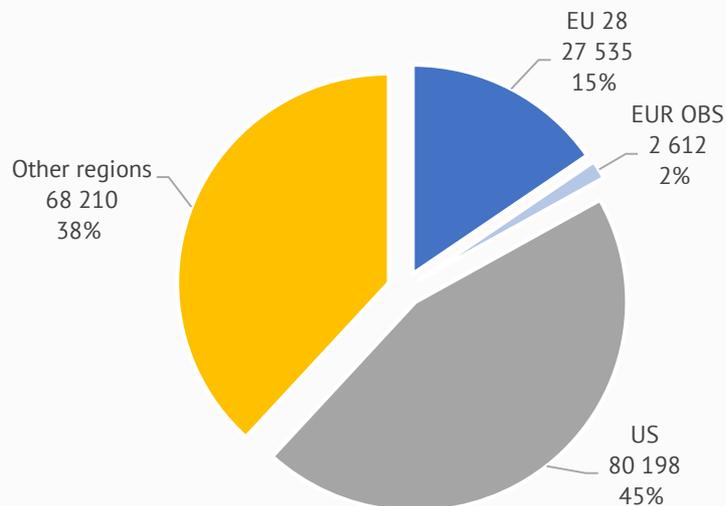
- ▶ On average, an EU film title is available in 3 countries, with Spanish film titles circulating the best with an average of 5.1 (often present in several Netflix catalogues).
- ▶ **Film titles of countries with a very low volume** (SI, BG, CY, HR) manage to **circulate wide** if they are picked up by a global service.
- ▶ Despite their volume, German and Italian titles have more difficulties to circulate than the other EU-5 titles.



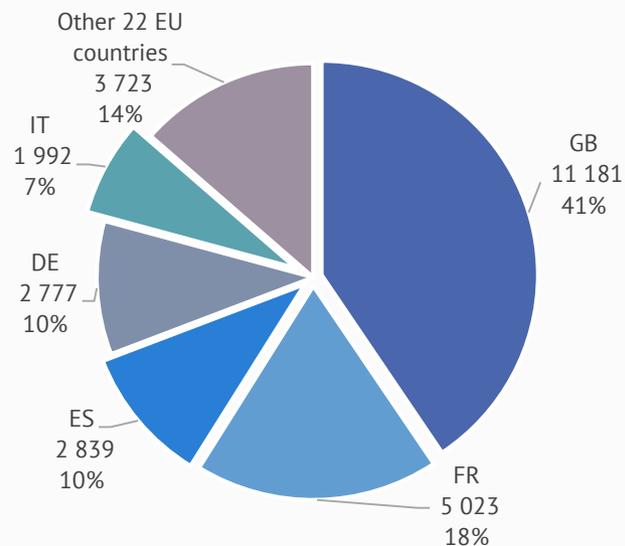
15% of all films available are of EU origin / EU-5 countries make up 86% of all EU films

- ▶ When the occurrences of films are considered, around 15% of all identified films in the catalogues are of EU 28 origin
- ▶ Without surprise, EU-5 films represent 86% of all EU films, British films more than 40% of all EU films and French films almost 20%.
- ▶ Spanish films, through a better circulation of titles in catalogues and countries, improve from the 5th rank by title count to the 3rd rank by number of occurrences.

178 555 occurrences of films by region of origin



27 535 occurrences of EU films by country of origin



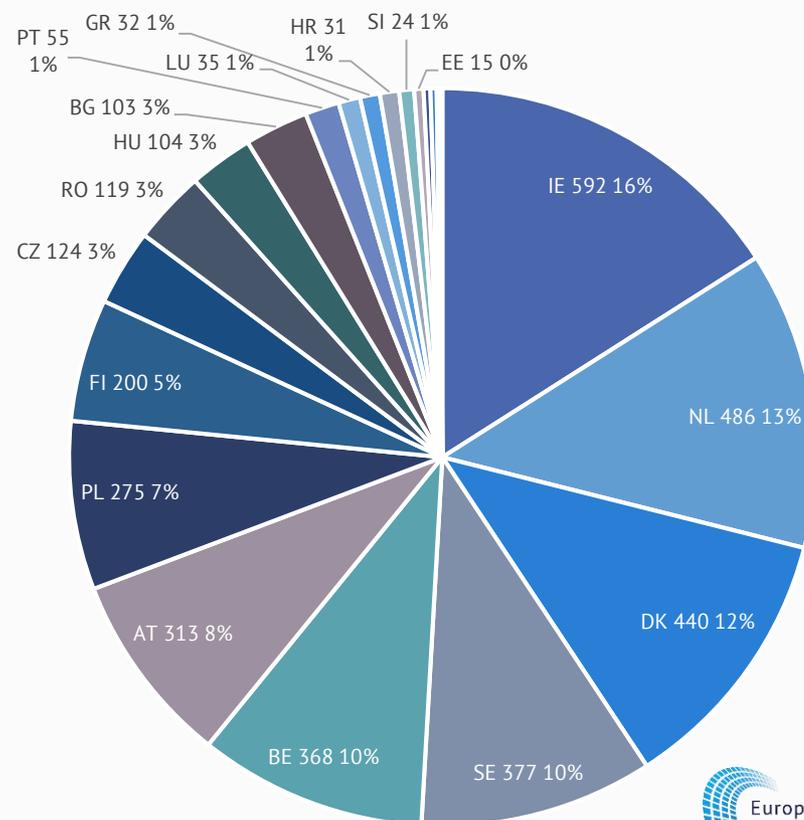
*15 499 films could not be identified, mostly films from the region in consideration and film titles written in local languages which did not figure in film databases such as IMDb, LUMIERE, TMDB. These unidentified films represented 8% of all films from the catalogues and have not been included in the analysis.

Details on the number of films and percentage of EU films for the other 22 EU countries

- ▶ When EU-5 countries are taken out of the total of EU films, 8 countries represent the major part with 82% of the remaining EU films – Nordics, IE, NL, BE, AT and PL.

Country	Number of films	% of EU films
EU-5	23 812	86%
IE	592	2,1%
NL	486	1,8%
DK	440	1,6%
SE	377	1,4%
BE	368	1,3%
AT	313	1,1%
PL	275	1,0%
FI	200	0,7%
CZ	124	0,5%
RO	119	0,4%
HU	104	0,4%
BG	103	0,4%
PT	55	0,2%
LU	35	0,1%
GR	32	0,1%
HR	31	0,1%
SI	24	0,1%
EE	15	0,1%
SK	11	0,04%
LT	10	0,04%
CY	5	0,02%
LV	4	0,01%
Total EU titles	27 535	100%

Split of the remaining 14% of EU films - 3 723 films in total



Top 10 - EU film titles by countries and services of presence

- ▶ Country presence highly influenced by the availability in all Netflix catalogues of the service sample and a presence in one of the Chinese catalogues
- ▶ Service presence influenced by titles for which there is no exclusivity for one service
- ▶ Spanish, British and Irish titles were the only ones available in all 21 countries of the sample.
- ▶ The blockbusters *Love Actually* and *Snatch* are the films available on the most services.

Top 10 EU Film titles by country presence

Original title	Production year	Country of origin	Number of countries
El bar	2017	ES,AR	21
Contratiempo	2016	ES	21
Secuestro	2016	ES	21
Durante la tormenta	2018	ES	21
Under the Shadow	2016	GB	21
City of Tiny Lights	2016	GB	21
Pursuit	2015	IE	21
Love Actually*	2003	GB,US	20
Johnny English*	2003	GB,US	20
Le meraviglie*	2014	IT,CH,DE	20

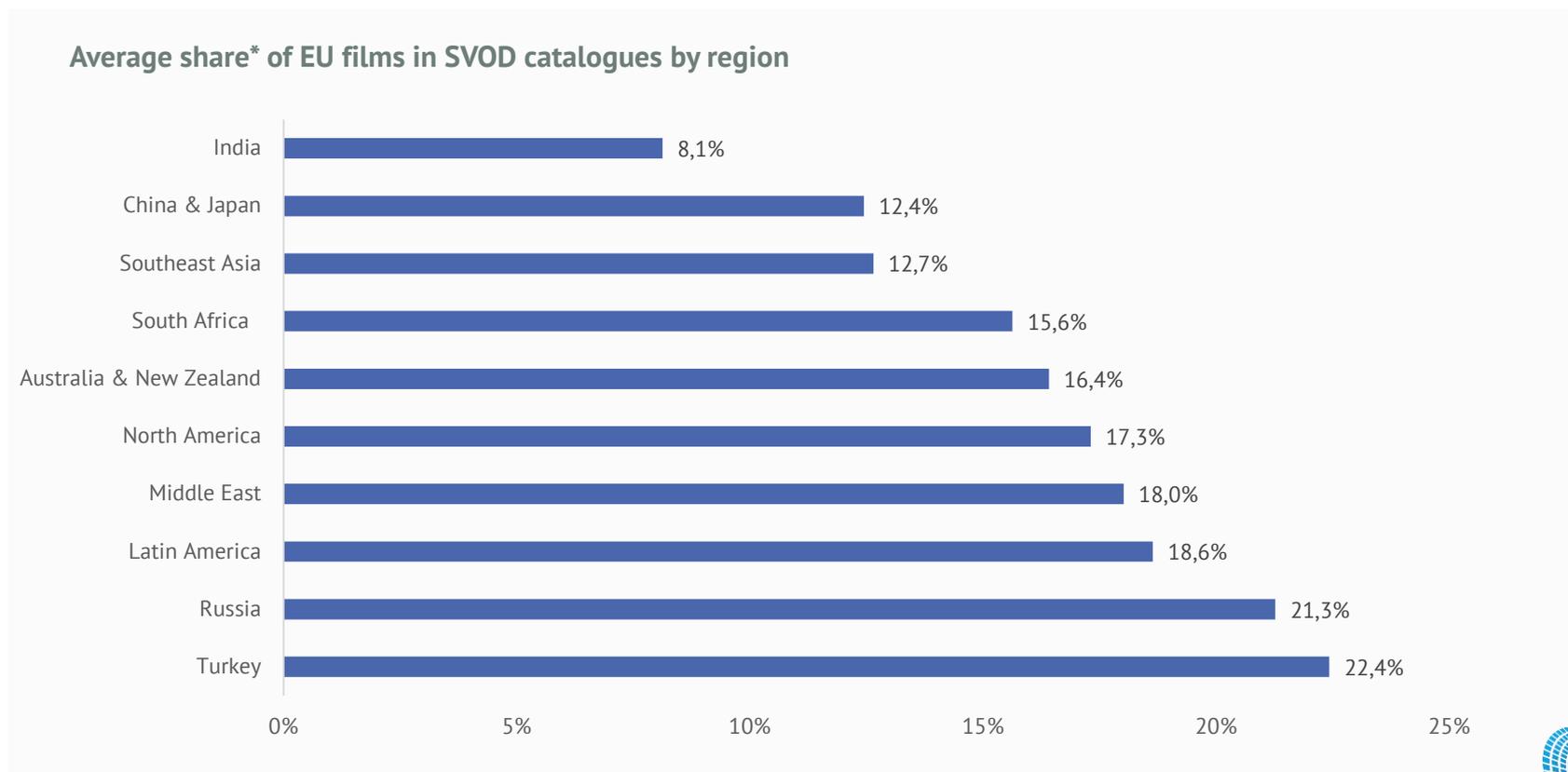
Top 10 EU Film titles by service presence

Original title	Production year	Country of origin	Number of services
Love Actually	2003	GB,US	27
Snatch	2000	GB,US	25
About Time	2013	GB	24
El bar	2017	ES	23
Johnny English	2003	GB,US	23
Le meraviglie	2014	IT,CH,DE	23
Jag älskar dig - En skilsmässokomedi	2016	SE	23
Colonia	2015	DE,FR,LU	23
Contratiempo	2016	ES	22
Bean	1997	GB,US	22

*and 122 other EU film titles with a presence in 20 countries, the 3 titles selected were those with the highest service presence. Mostly EU films available in the 20 Netflix catalogues and a local service.

Share of EU films in catalogues for each region

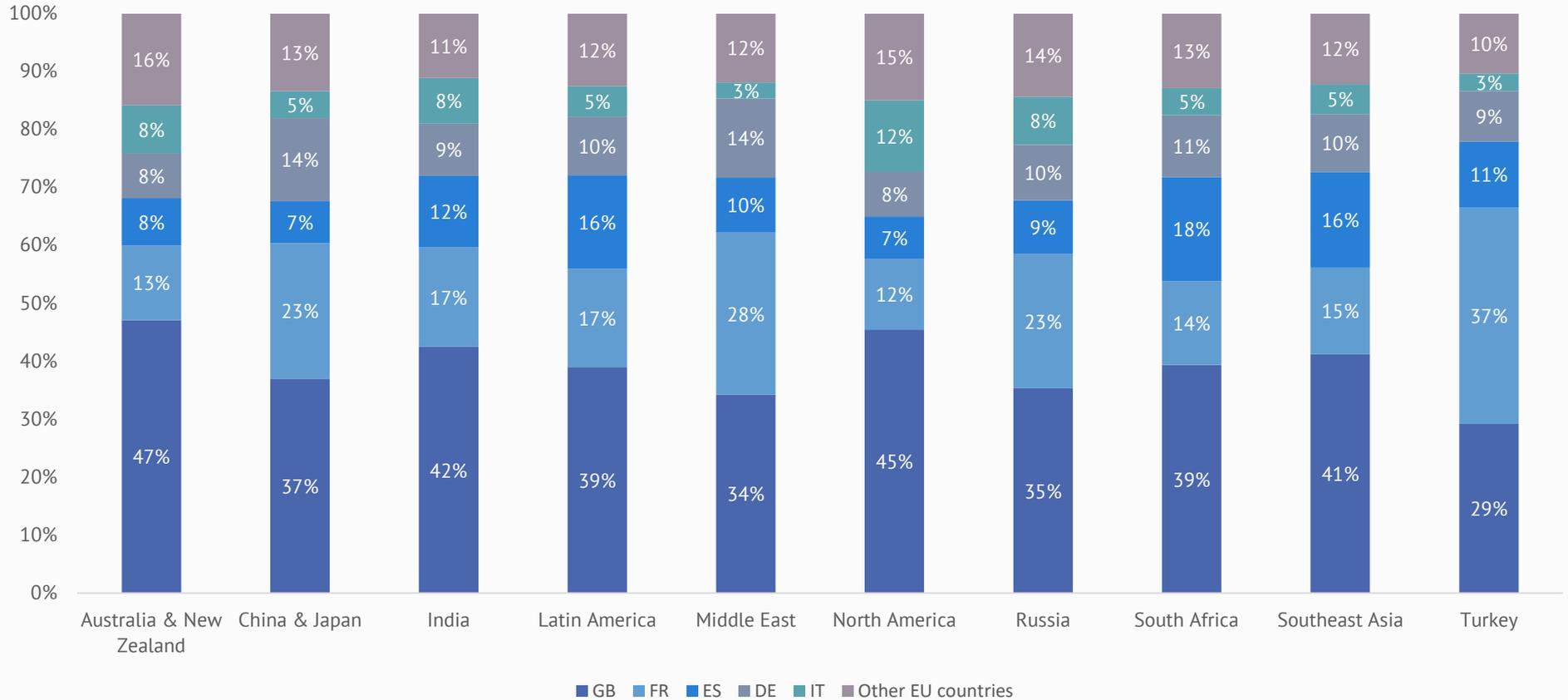
- ▶ While the average share of EU films is low in Asian catalogues, English/Spanish-speaking regions, the Middle East and Russia and Turkey have a share of EU films above the average of sample, which stood at 15%.
- ▶ Below average regions could represent an export opportunity for EU films on SVOD services.



*Shares based only on identified films. Unidentified films accounted for 2% of all films in Turkey, 3% in South Africa and Middle East, 4% in Australia & New Zealand, 7% in Southeast Asia, 8% in Latin and North America, 9% in India, 11% in China & Japan and 15% in Russia.

Snapshot by region - dominance of EU-5 titles in the different SVOD catalogues

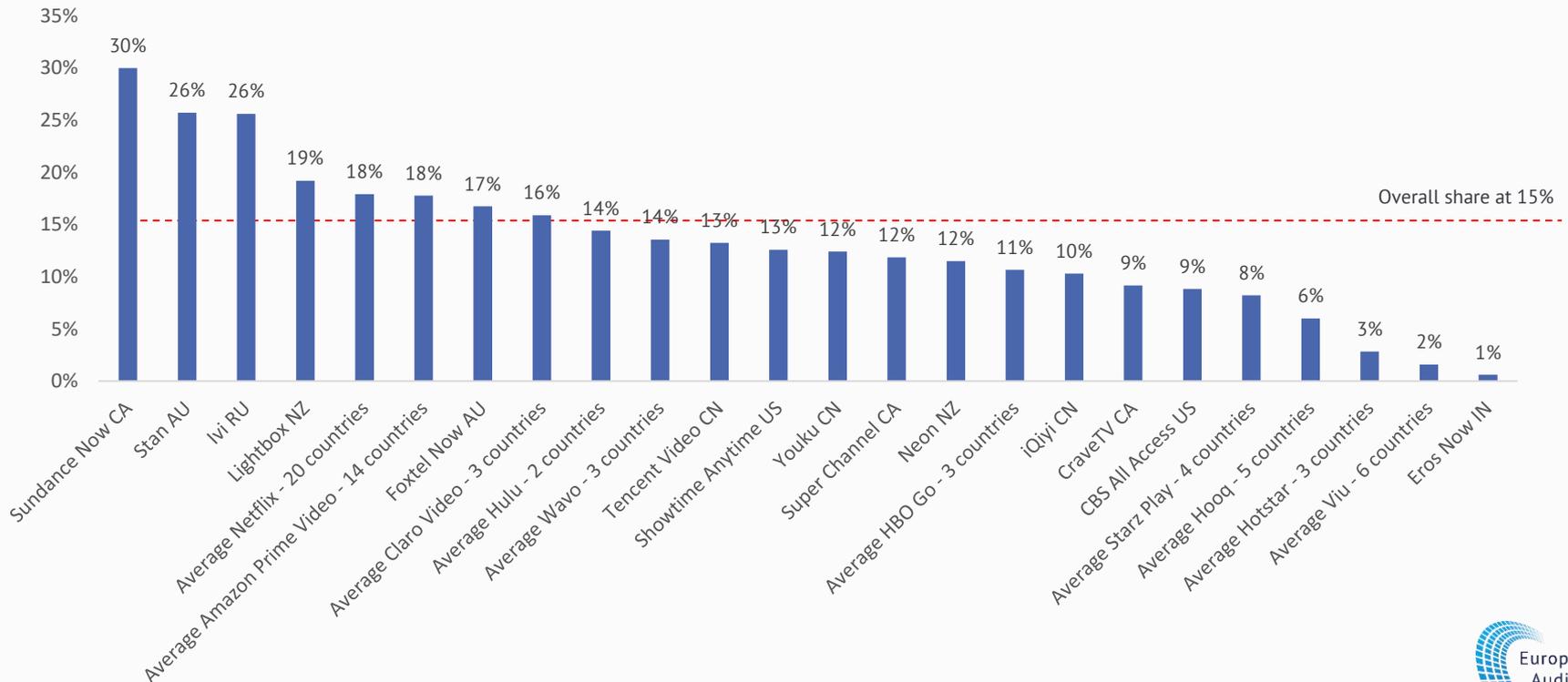
Split of EU films by country of origin by region of SVOD services



Stark differences by types of services and regional presence

- ▶ National SVOD services in Oceania, Canada and Russia have the highest share of EU films in their catalogues.
- ▶ Multi-country services Netflix and Amazon Prime Video have the highest average shares of EU films in their catalogues. Their presence in Europe enables them to circulate EU films outside Europe compared to services without operations in Europe.
- ▶ Asian and Indian services could present an opportunity for EU films as they boost the lowest shares.

Average share* of EU films in SVOD catalogues

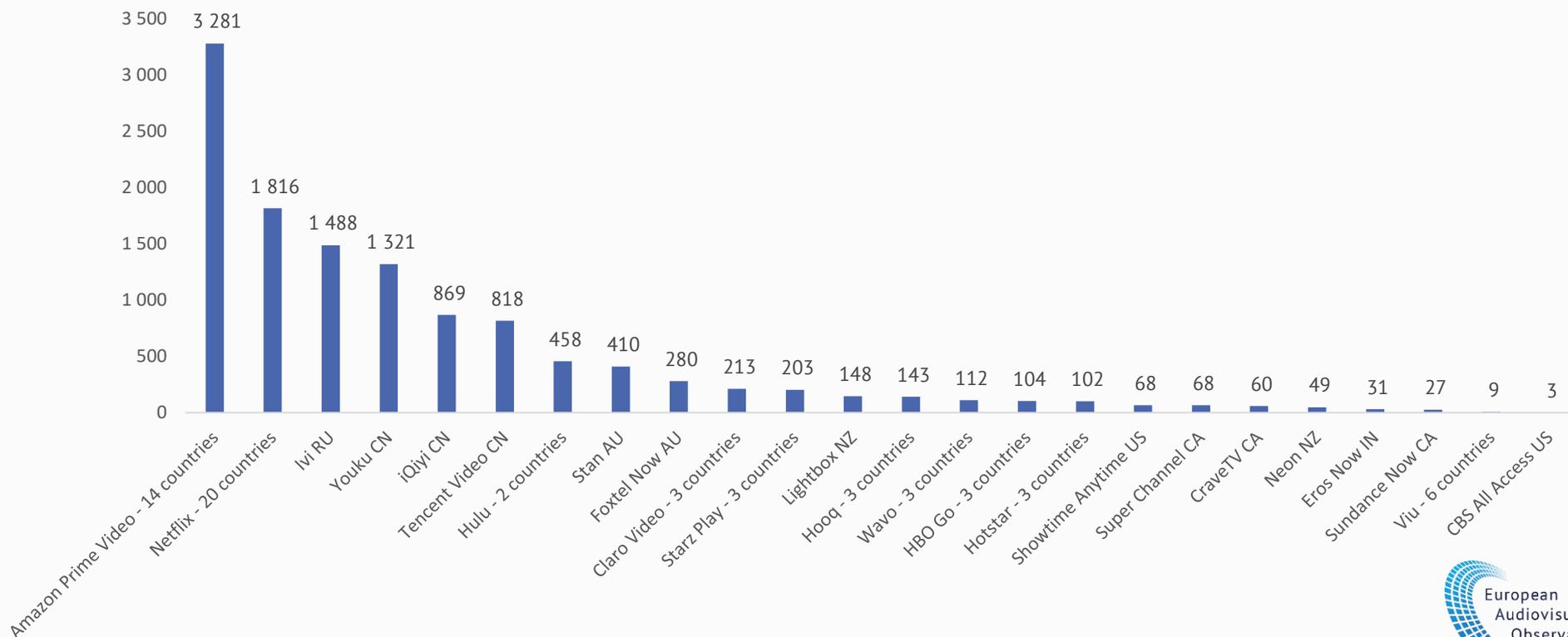


*Shares based only on identified films.

Which SVOD services are the biggest buyers of EU film titles?

- ▶ Amazon, by far, was the largest acquirer of EU films for its 14 services. Netflix followed at the second rank.
- ▶ However, single country services Ivi in Russia, Youku, iQiyi and Tencent Video in China were the biggest acquirers for single catalogue services.
- ▶ On the other hand, services in India, North America and Southeast Asia had the smallest count of unique EU film titles in their catalogues.

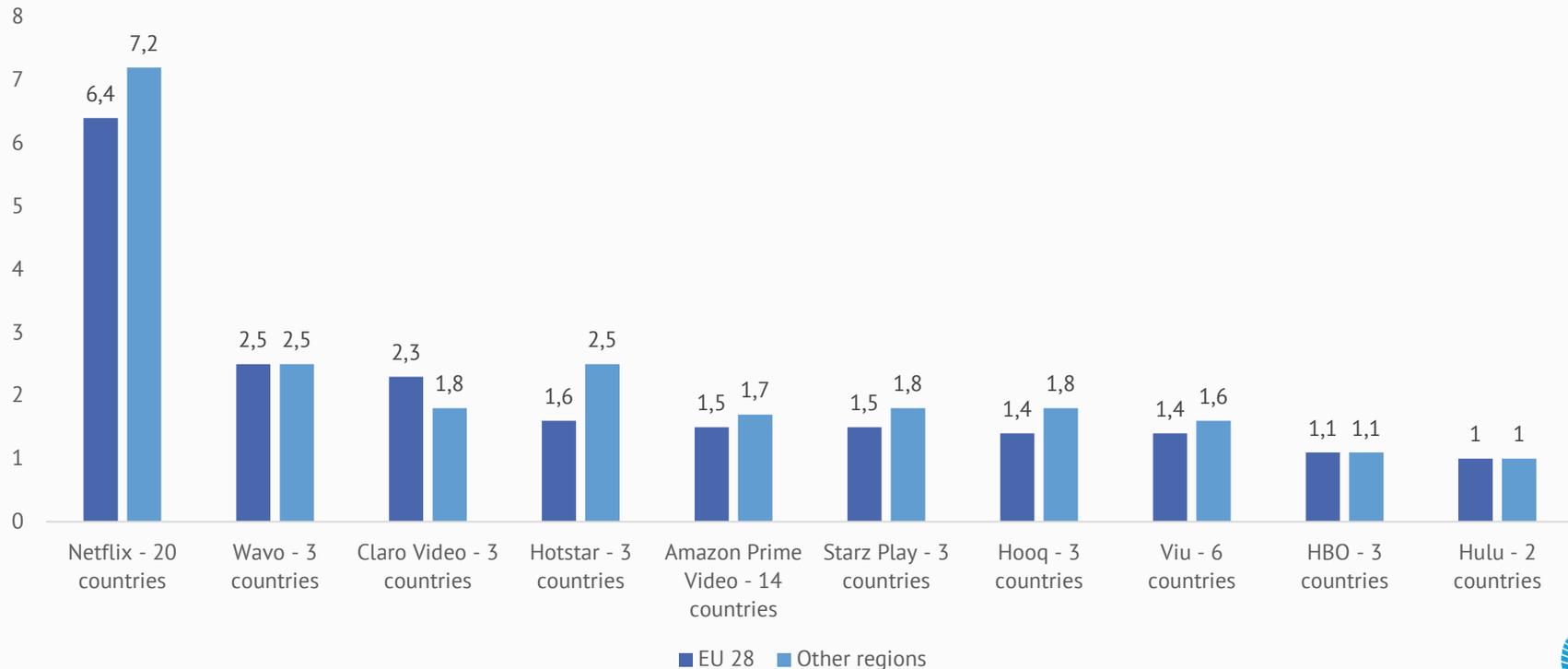
Number of unique EU titles in SVOD catalogues by services



Global rights versus national rights for multi-country SVOD services

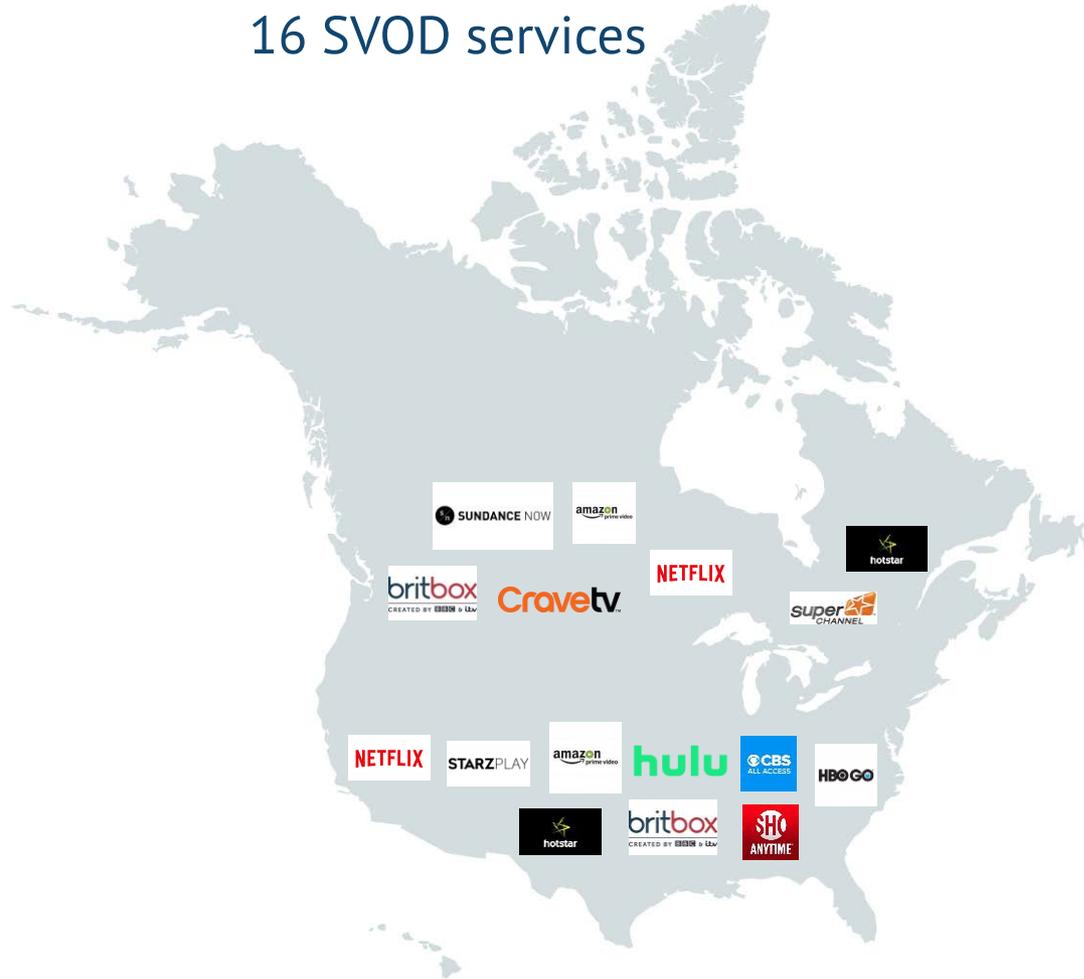
- ▶ Netflix tends to acquire global rights for its unique film titles and to circulate them in many of its country catalogues
- ▶ Amazon tends to adapt its country catalogues, with a rather low circulation of unique films titles
- ▶ Wavo and Claro Video are other services which tend to acquire rights for all of their catalogues.
- ▶ The other multi-country services have a low circulation of their unique film titles in their catalogues and thus seem to acquire titles solely for specific national catalogues.

Circulation of unique titles in catalogues of multi-country services - EU and other regions



Details by region

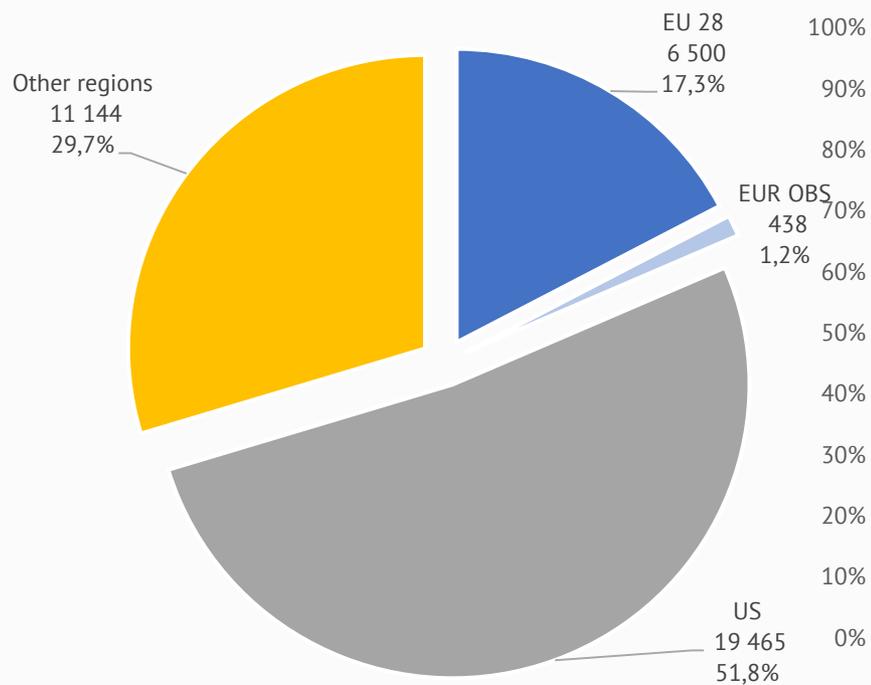
North America
USA and Canada
16 SVOD services



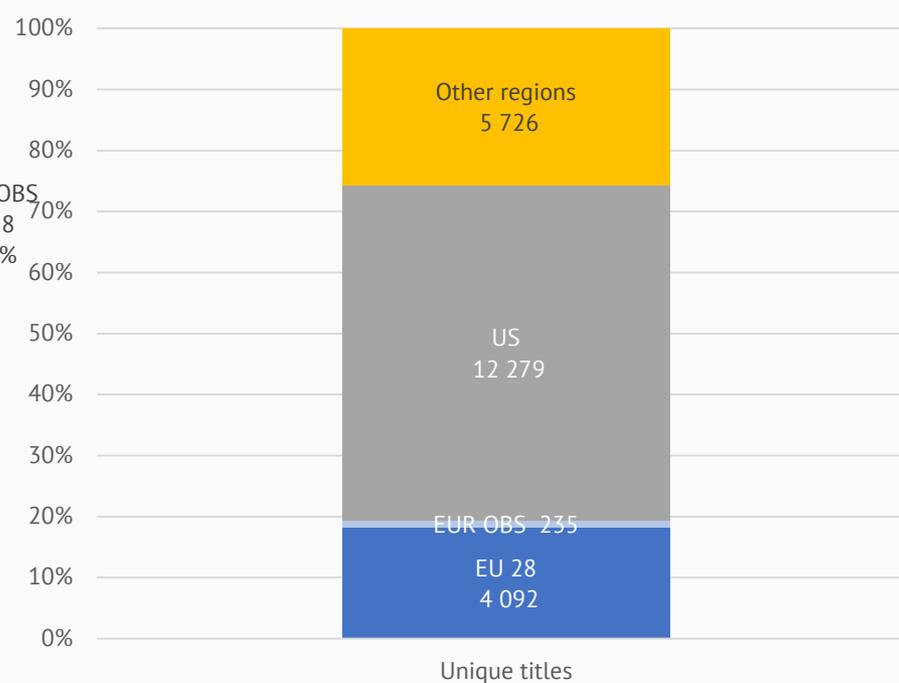
17% of all films available and 18% of all unique film titles are of EU origin

- ▶ EU 28 films represent 17% of films available on the 16 North American SVOD services
- ▶ Share of national films of 55% in the US and 3% in Canada.
- ▶ EU unique film titles represent 18,3% of all unique film titles available with 4 092 titles

37 574 occurrences of films by region of origin



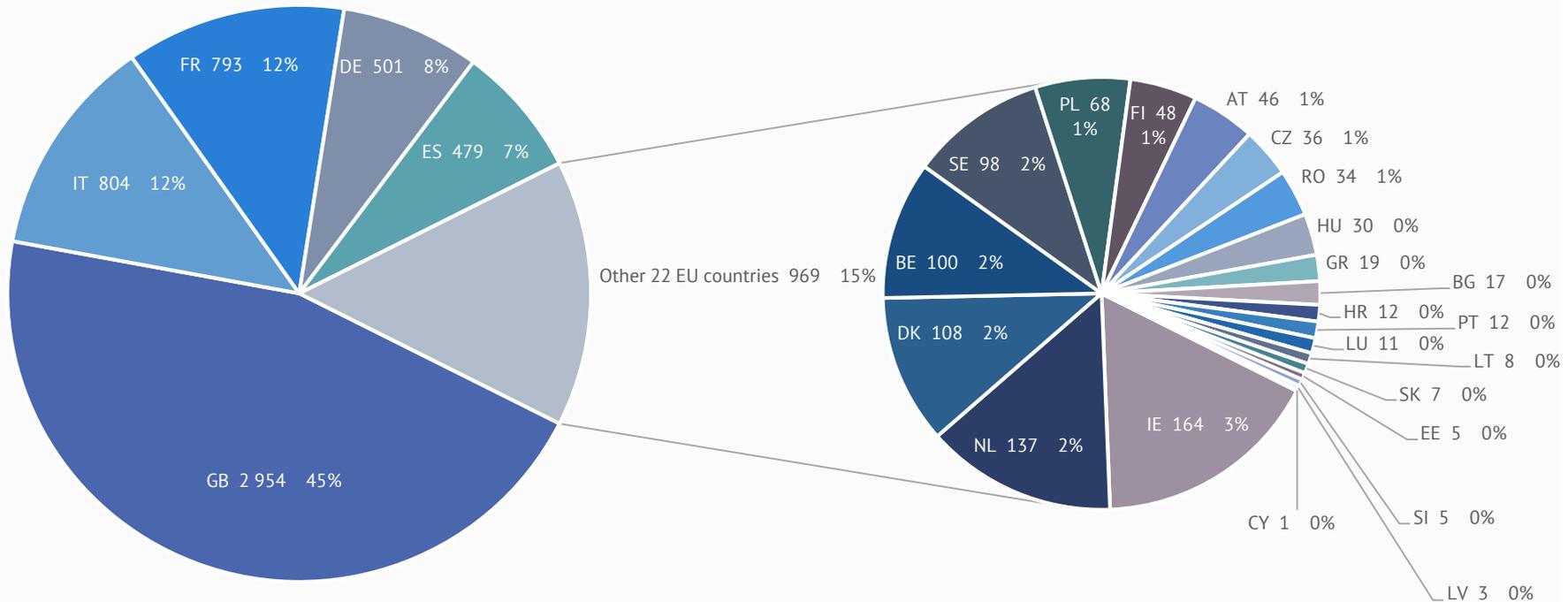
22 332 unique film titles by region of origin



British, Classic Italian and French films are the main source of EU films in North America

- ▶ EU-5 represent 85% of all EU films and British films 45% of all EU films.
- ▶ Italian catalogue/classic films, with the lowest average year of production of all EU films (1983 compared to an EU average of 2003), rank 2nd in North American catalogues.

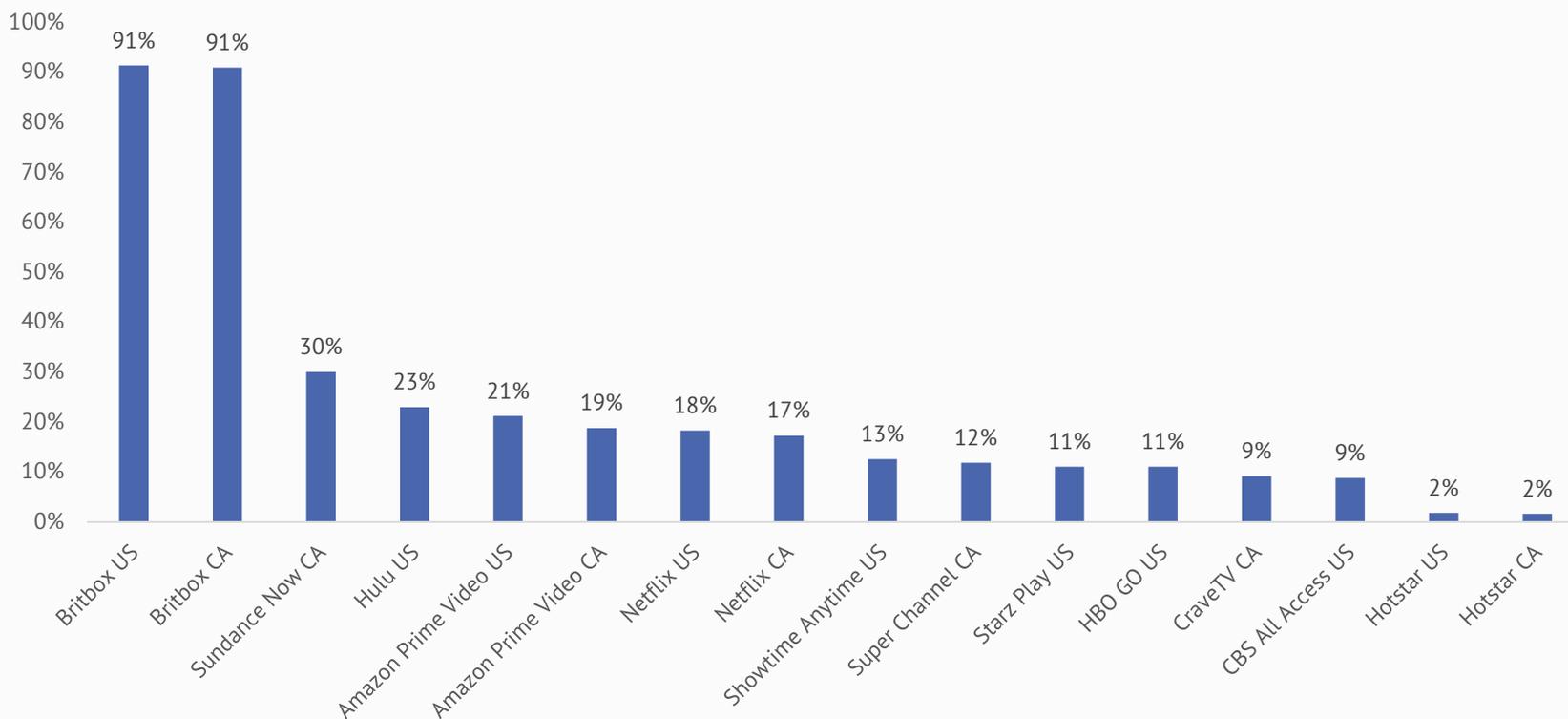
6 500 occurrences of EU films by country of origin



A lot of variance between SVOD services for the share of EU 28 films

- ▶ While British-centric Britbox has the highest share of EU films, and art house specialized service Sundance the second highest, Indian service Hotstar has the lowest share of EU 28 films in its catalogues
- ▶ Netflix and Amazon in the US and Canada dedicate almost 1/5th of their film catalogue to EU films.
- ▶ Services operated by US broadcasters, such as CBS, Starz, HBO and Showtime, have lower shares of EU films.
- ▶ Surprising high share for Hulu of EU films – a complement to the TV series offering?

Overview of EU 28 shares by SVOD catalogue



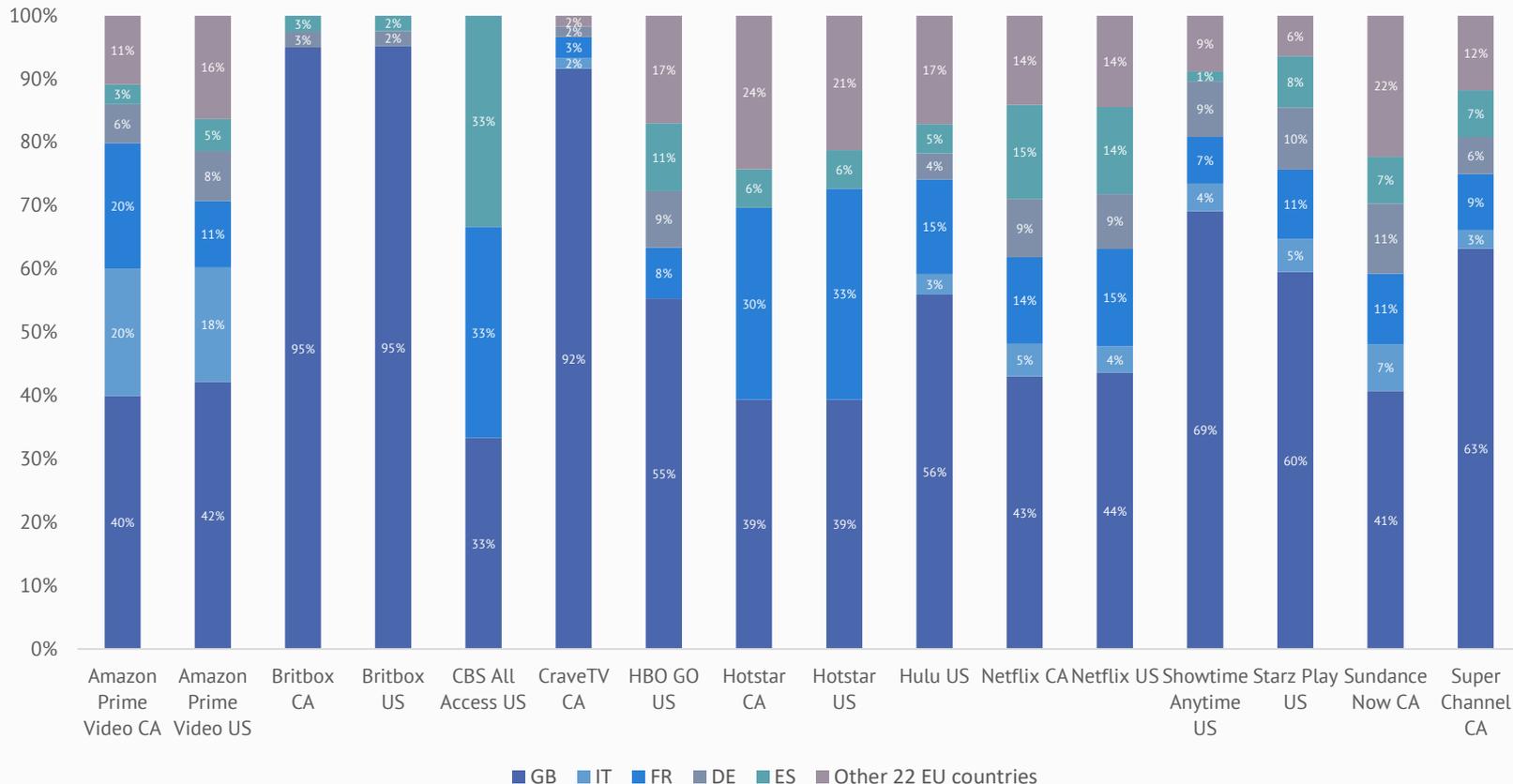
Total films per catalogue

Amazon Prime Video CA	Amazon Prime Video US	Britbox CA	Britbox US	CBS All Access US	CraveTV CA	HBO GO US	Hotstar CA	Hotstar US	Hulu US	Netflix CA	Netflix US	Showtime Anytime US	Starz Play US	Sundance Now CA	Super Channel CA
1 719	16 619	44	46	34	657	1 014	2 030	1 838	1 604	4 705	4 468	540	1 565	90	574

British, Classic Italian and French films are the main source of EU films in North America

- ▶ All services have a high share of British films in their EU film offering
- ▶ Italian films represent a high share of EU films in the Amazon catalogues but for most of the service French films are the second origin for EU films.
- ▶ Sundance, Hotstar, HBO, Netflix, Super Channel and Amazon have a share between 11%-24% of films from other EU countries than EU-5 in their EU film offering

Split of EU films by country of origin by SVOD catalogue



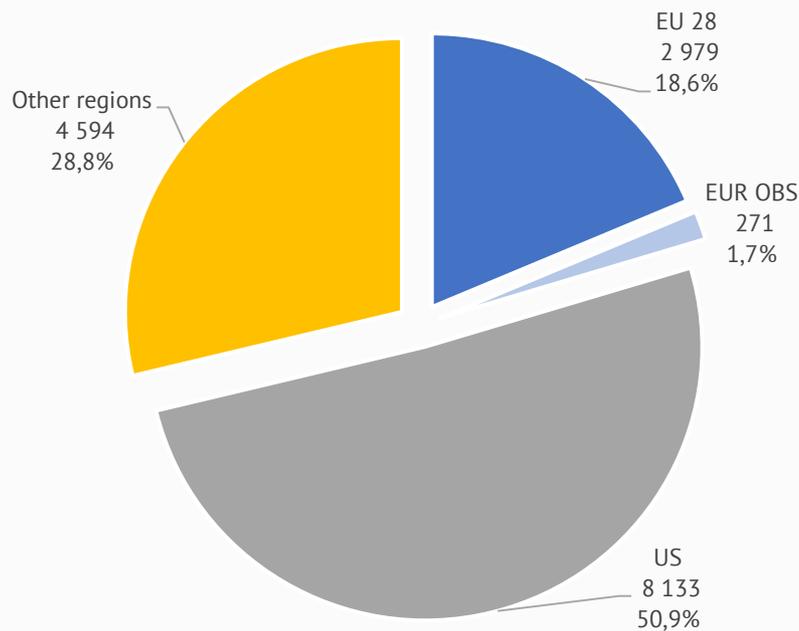
Latin America Argentina, Brazil and Mexico 9 SVOD services



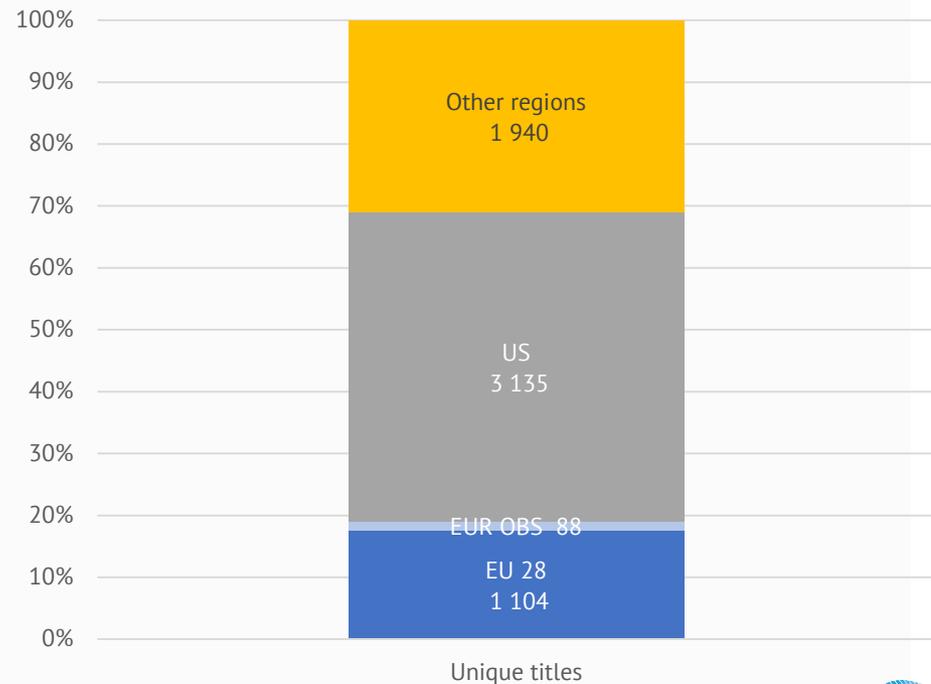
18% of films available are of EU origin in Latin America

- ▶ EU 28 films represent **18,6% of films** available on the 9 Latin American SVOD services
- ▶ Share of national films on average 6% in the 3 countries with stark variances – 2% in Argentina and Brazil, 14% in Mexico.
- ▶ EU unique film titles represent **17,6% of all unique film titles**

15 977 occurrences of films by region of origin



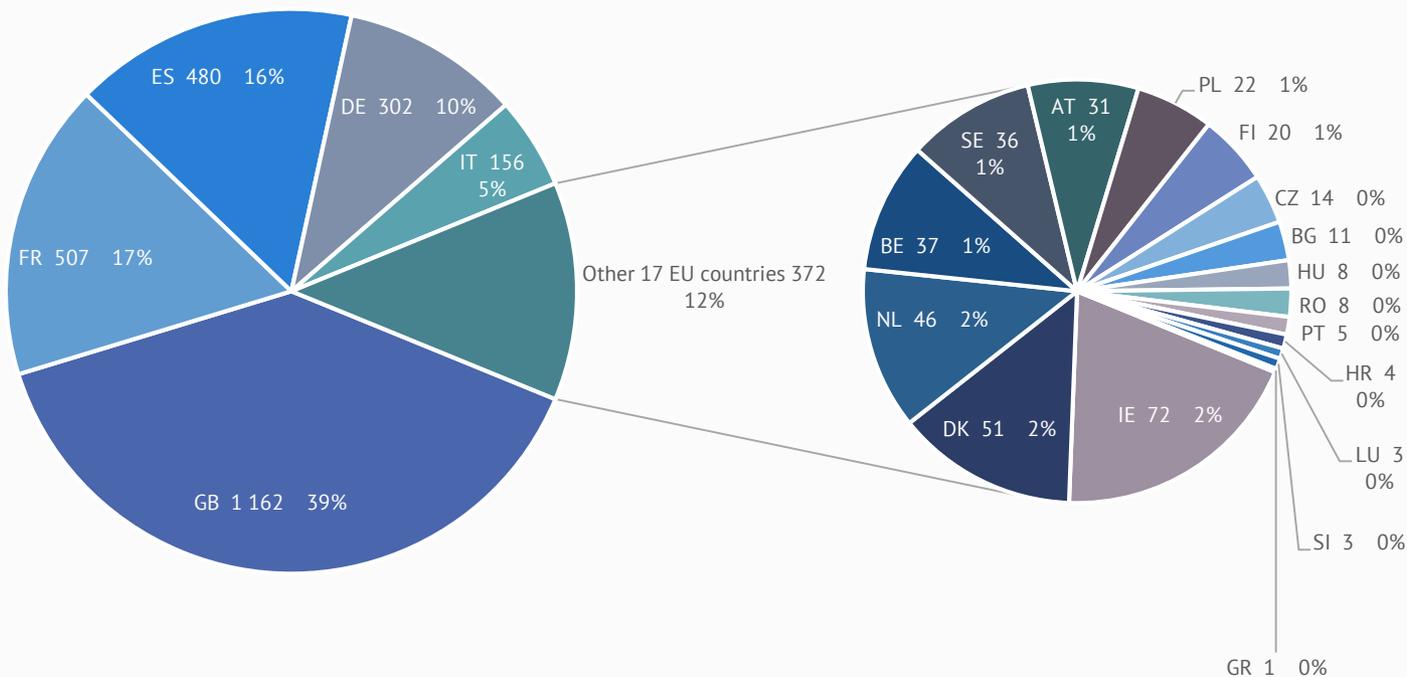
6 267 unique film titles by region of origin



British, French and Spanish films are the main source of EU films in Latin America

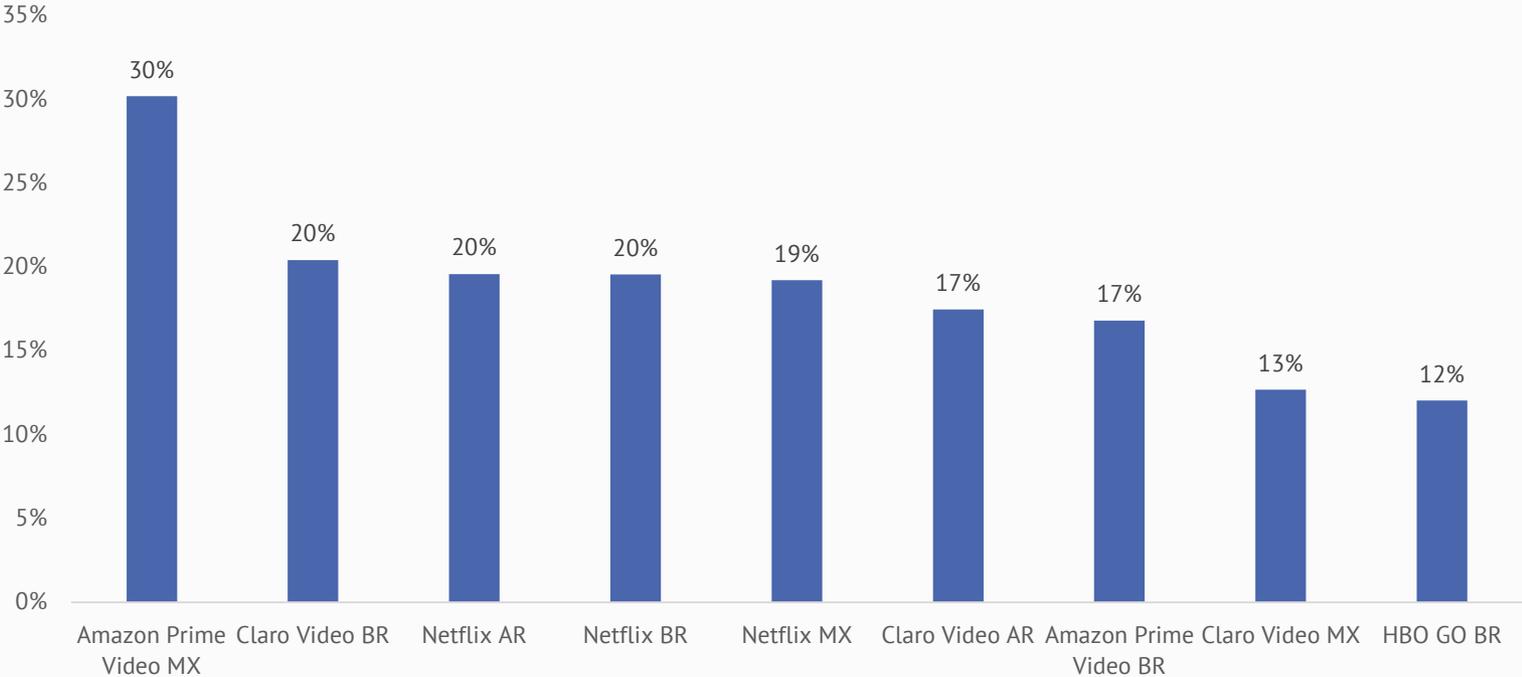
- ▶ EU-5 represent 88% of all EU films and British films 39% of all EU films.
- ▶ Linguistic proximity - Spanish films make up 16% of EU films in the region, just behind French films, the highest share for Spanish films in all regions analysed.

2 979 occurrences of EU films by country of origin



Amazon and Netflix provide on average the highest share of EU films in the region

Overview of EU 28 shares by SVOD catalogue



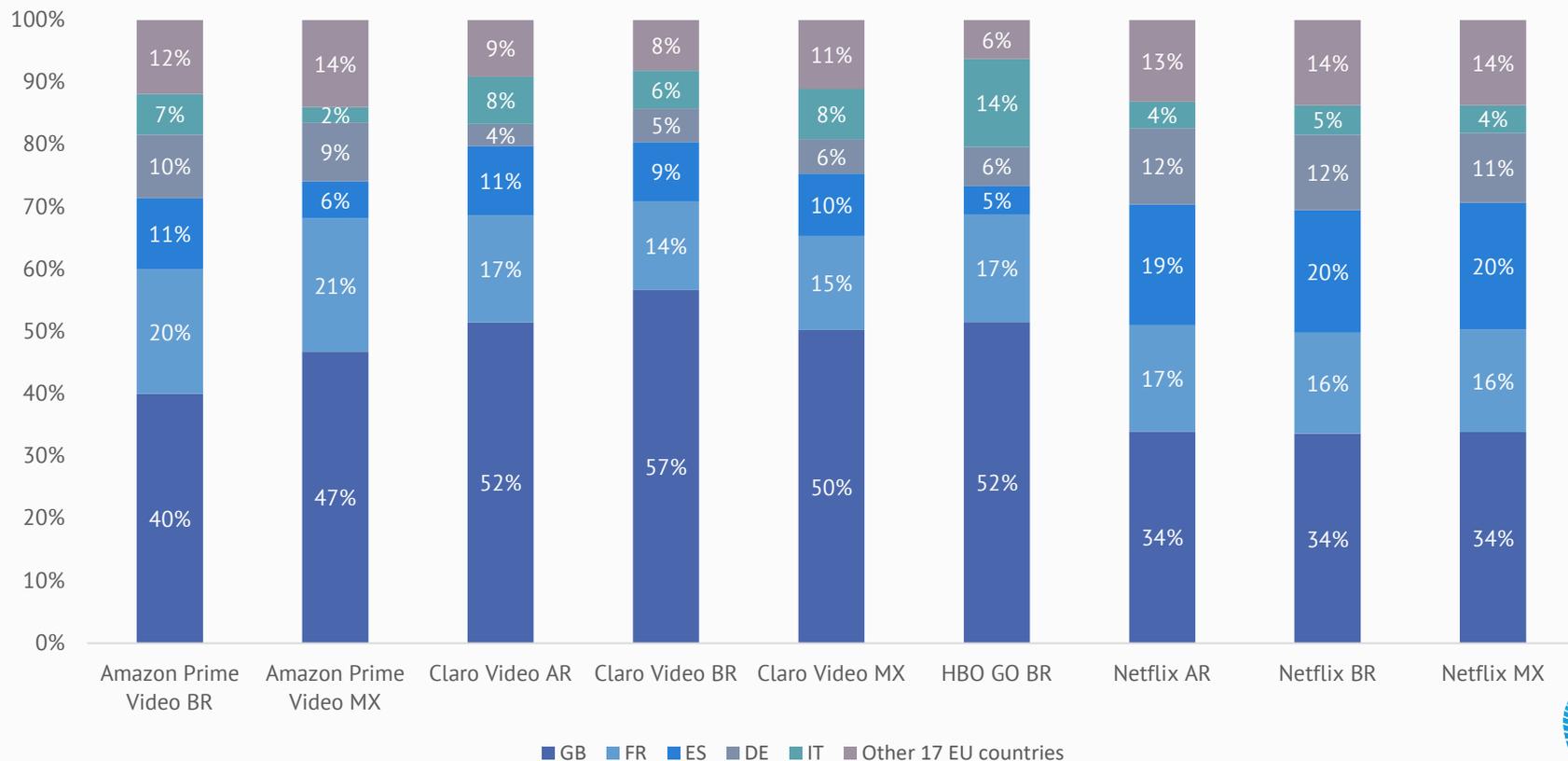
Total films per catalogue

Amazon Prime Video BR	Amazon Prime Video MX	Claro Video AR	Claro Video BR	Claro Video MX	HBO GO BR	Netflix AR	Netflix BR	Netflix MX
1 459	666	1 134	725	1 569	532	3 473	3 223	3 196

Netflix is more relying on films of diverse EU countries than its competitors in LatAm

- ▶ Netflix relied less on British films and more on Spanish films than its competitors in the region, showing catalogues adapted to the region.
- ▶ Amazon and Netflix are also the services with the highest share of other EU countries in their catalogues for EU films.

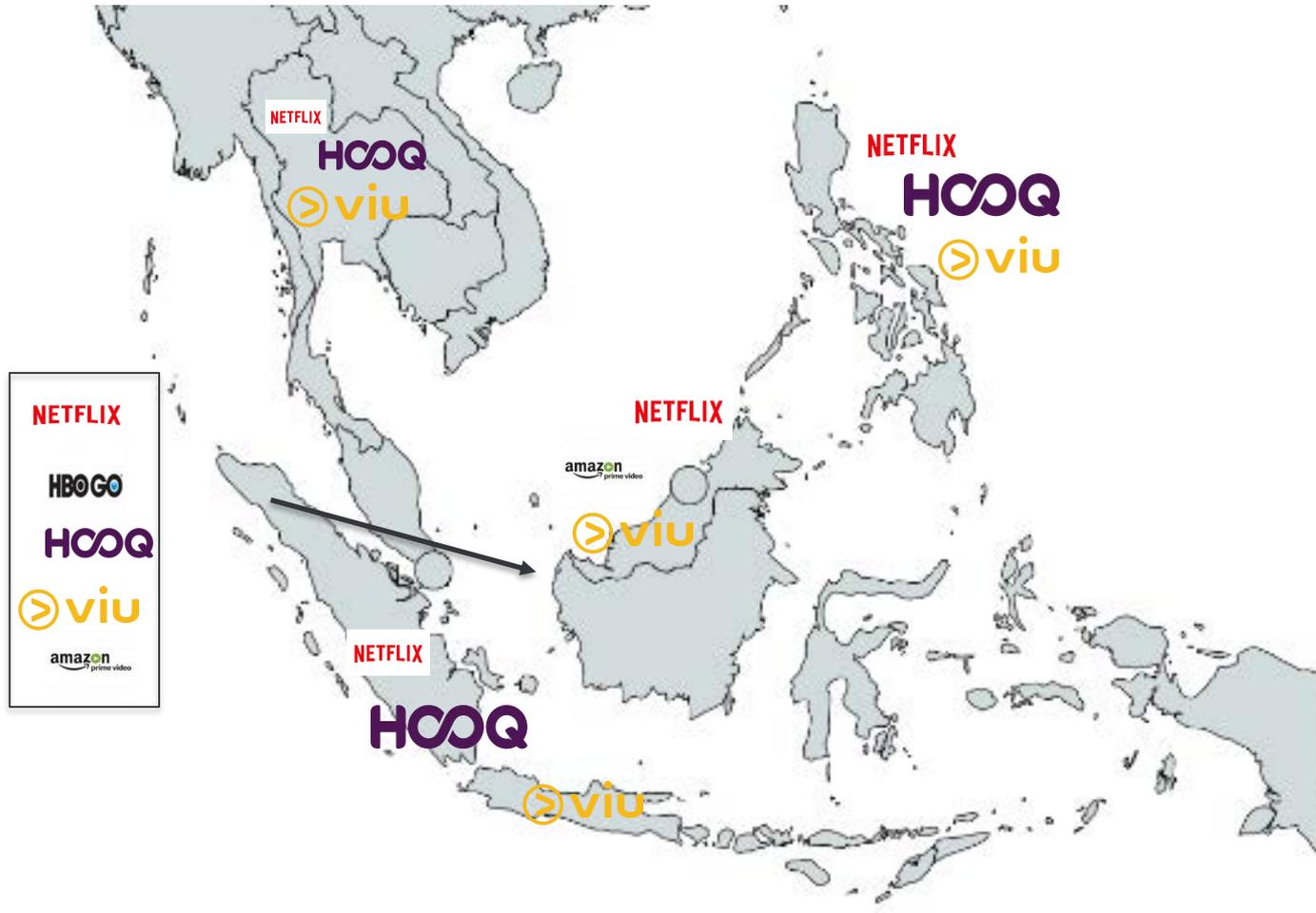
Split of EU films by country of origin by SVOD catalogue



Southeast Asia

Indonesia, Malaysia, Philippines, Singapore and Thailand

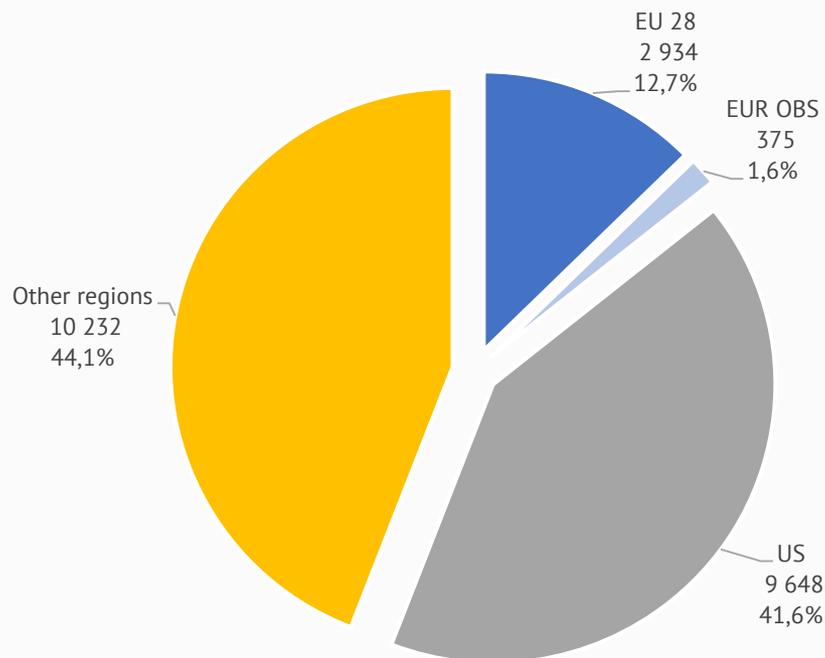
17 SVOD services



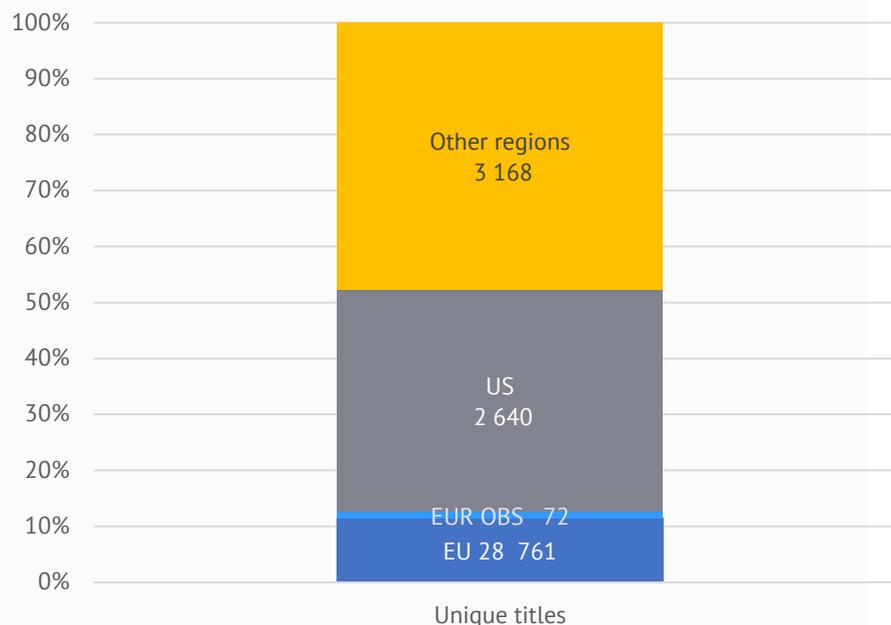
13% of films available are of EU origin in Southeast Asia

- ▶ EU 28 films represent **12,7% of films** available on the 17 Southeast Asian SVOD services.
- ▶ The services rely more on **films of other regions** as the comparatively lower share of US films also attest to.
- ▶ Share of national films from **0,1% in Singapore to 17% in the Philippines**. Average of 5% of national films for the 5 countries.
- ▶ EU unique titles represent 11,4% of all unique titles.

23 189 occurrences of films by region of origin



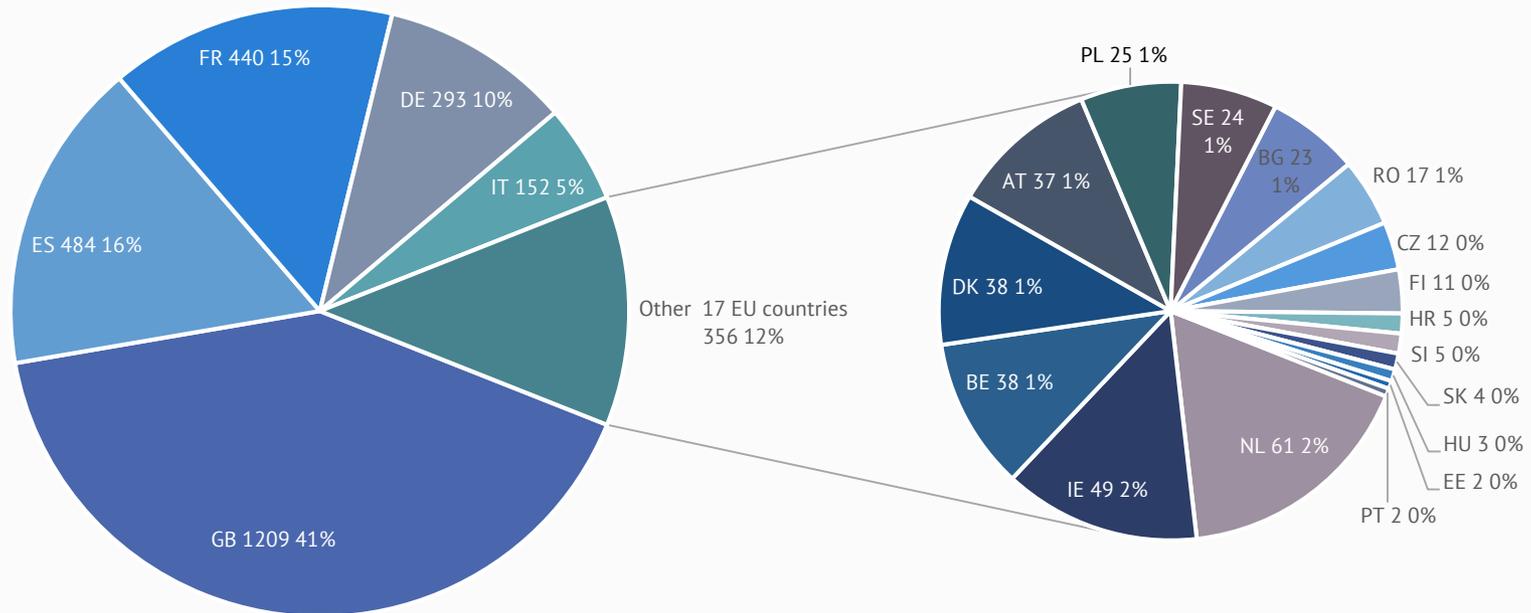
6 641 unique film titles by region of origin



British films make up the lion share of EU films

▶ **British, Spanish and French films** represent 72% of all EU films available in the region.

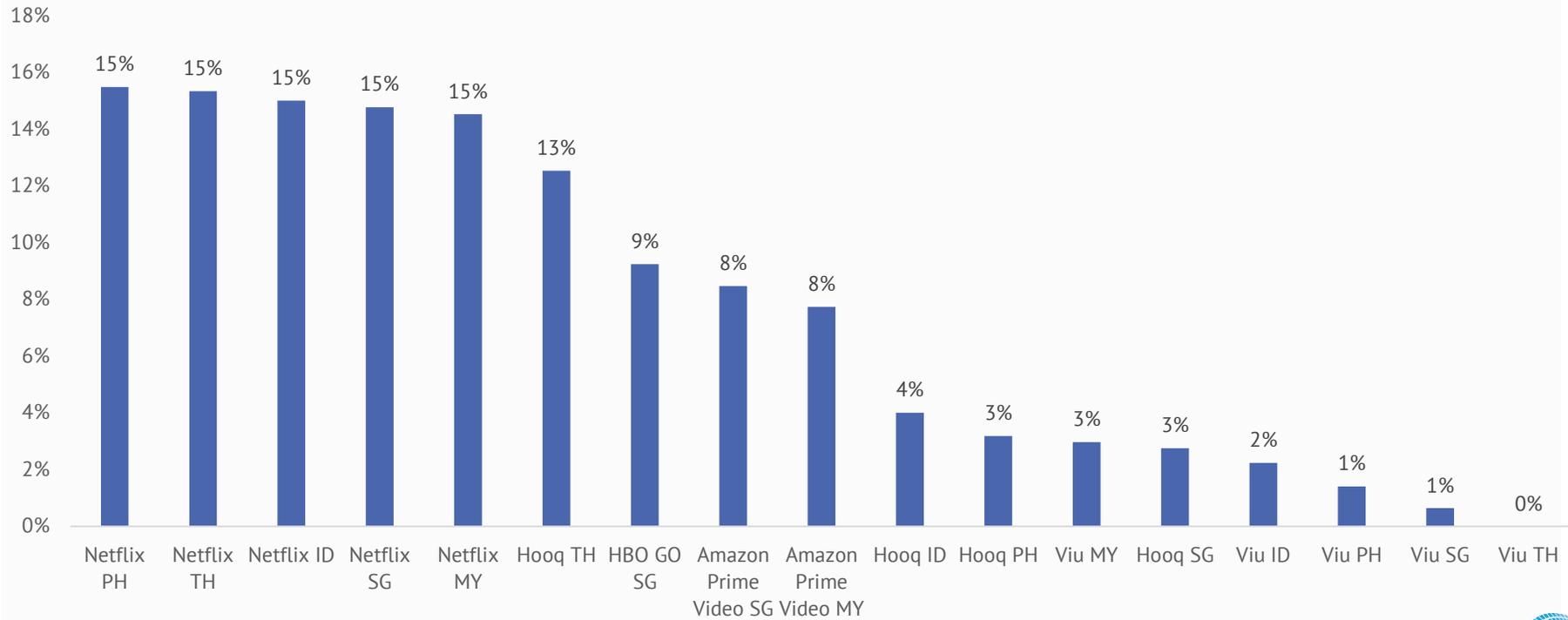
2 934 occurrences of EU films by country of origin



Regional services have a low share of EU films, relying more on films of the region

- ▶ Netflix in the Southeast Asian region is the SVOD service with the highest share of EU films at 15%, proposing almost the same EU titles in its country catalogues.
- ▶ Hong Kong-based service Viu, specialised in Asian content, boosts the lowest share of EU films of SVOD services in the region.

Overview of EU 28 shares by SVOD catalogue



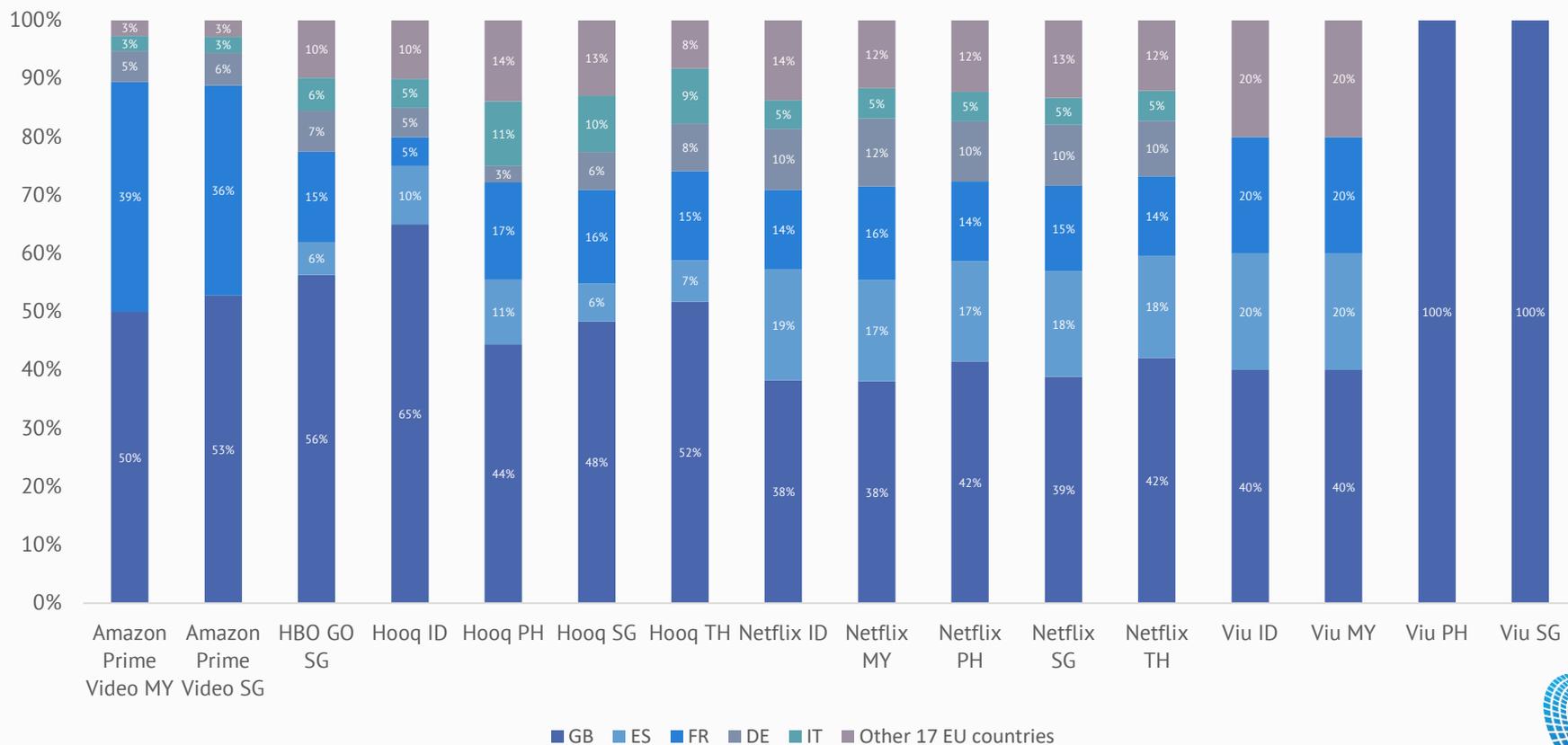
Total films per catalogue

Amazon Prime Video MY	Amazon Prime Video SG	HBO GO SG	Hooq ID	Hooq PH	Hooq SG	Hooq TH	Netflix ID	Netflix MY	Netflix PH	Netflix SG	Netflix TH	Viu ID	Viu MY	Viu PH	Viu SG	Viu TH
491	425	768	499	1 131	1 123	678	3 258	3 724	3 576	3 363	3 410	223	168	142	155	55

Most services rely on British films for their EU film offering

- Spanish films make up an important proportion of EU films in the Netflix and Viu catalogues while Amazon relies more on French films than its other competitors

Split of EU films by country of origin by SVOD catalogue



China & Japan 6 SVOD services



hulu
JAPAN

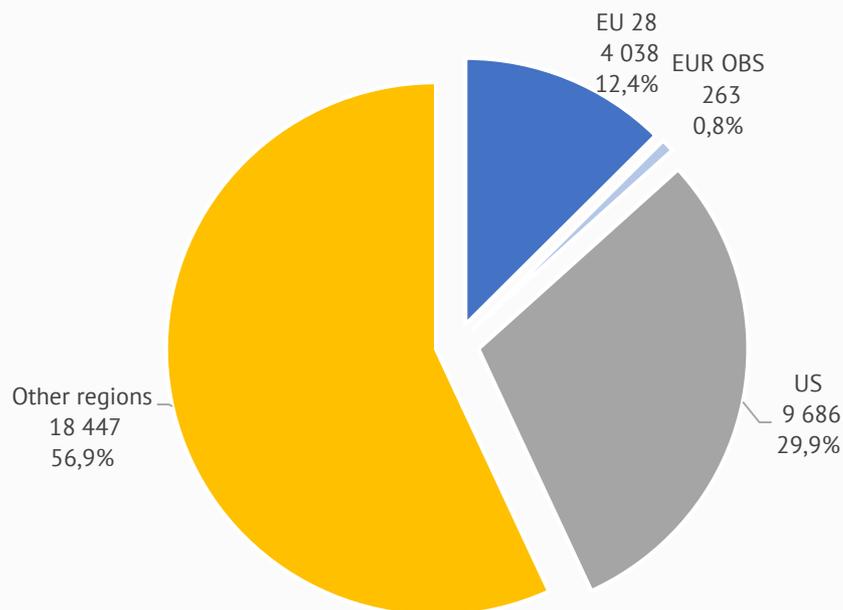
NETFLIX

amazon
prime video

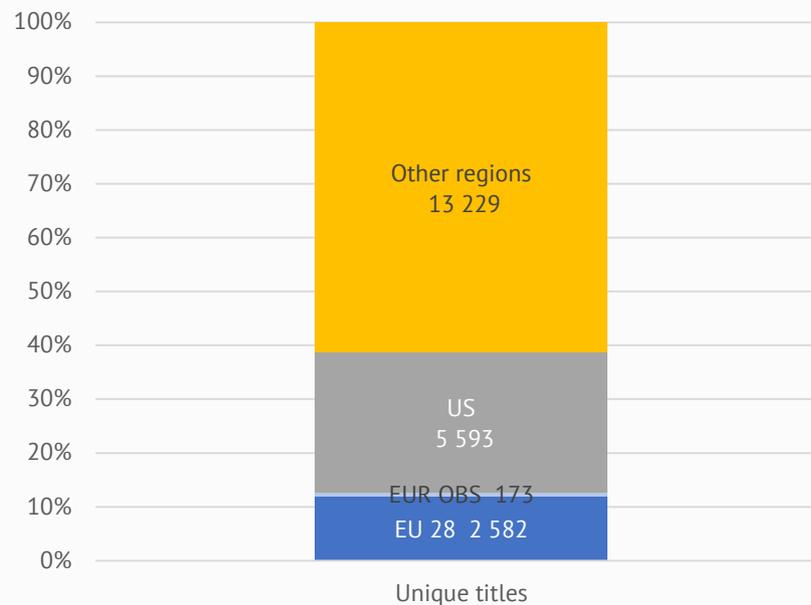
12% of films available are of EU origin in China and Japan

- ▶ EU 28 films represent **12% of films** available on the 9 Latin American SVOD services for a total of 2 979 films.
- ▶ Share of national films at 36% in China and 29% in Japan – services are more national focused
- ▶ EU unique titles represent **12%** of all unique titles available

32 434 occurrences of films by region of origin



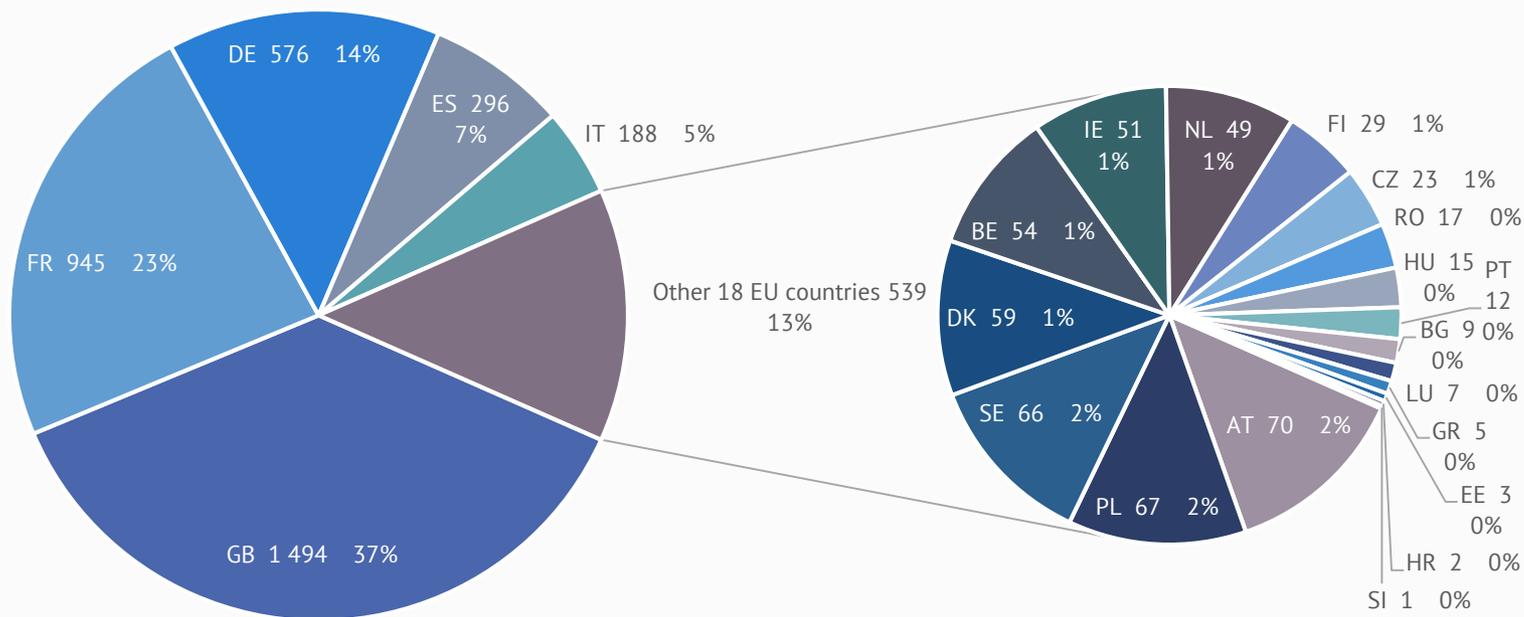
21 577 unique film titles by region of origin



EU-5 leads again but variety of EU countries

- ▶ EU-5 represent 87% of all EU films and British and French films 60% of all EU films.
- ▶ High percentage of German-speaking films at 16% - DE and AT
- ▶ Mostly recent films with an average production year of 2008 for all EU films

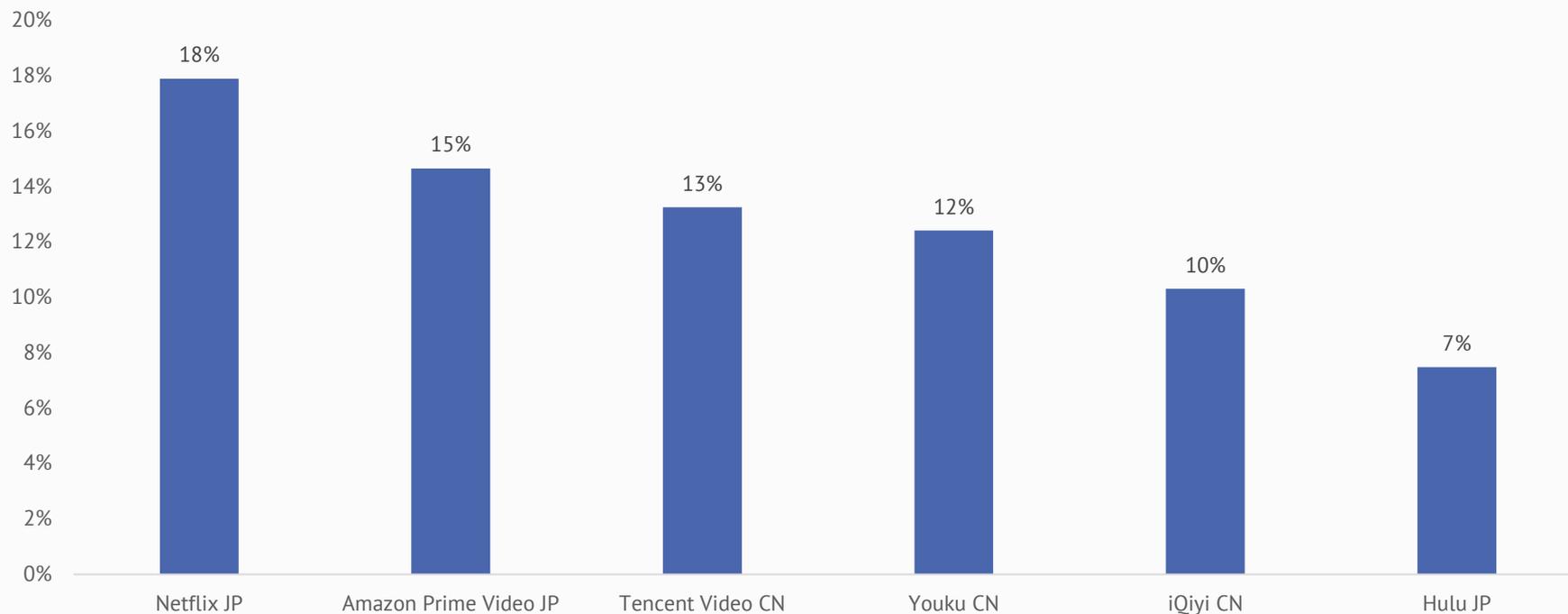
4 038 occurrences of EU films by country of origin



Chinese services rely more on recent EU production, Netflix and Amazon in Japan with high share of EU films

▶ The Chinese market, even increasingly more important for EU feature films, could represent an opportunity for EU films as the share of EU films is still relatively low compared to services of other regions.

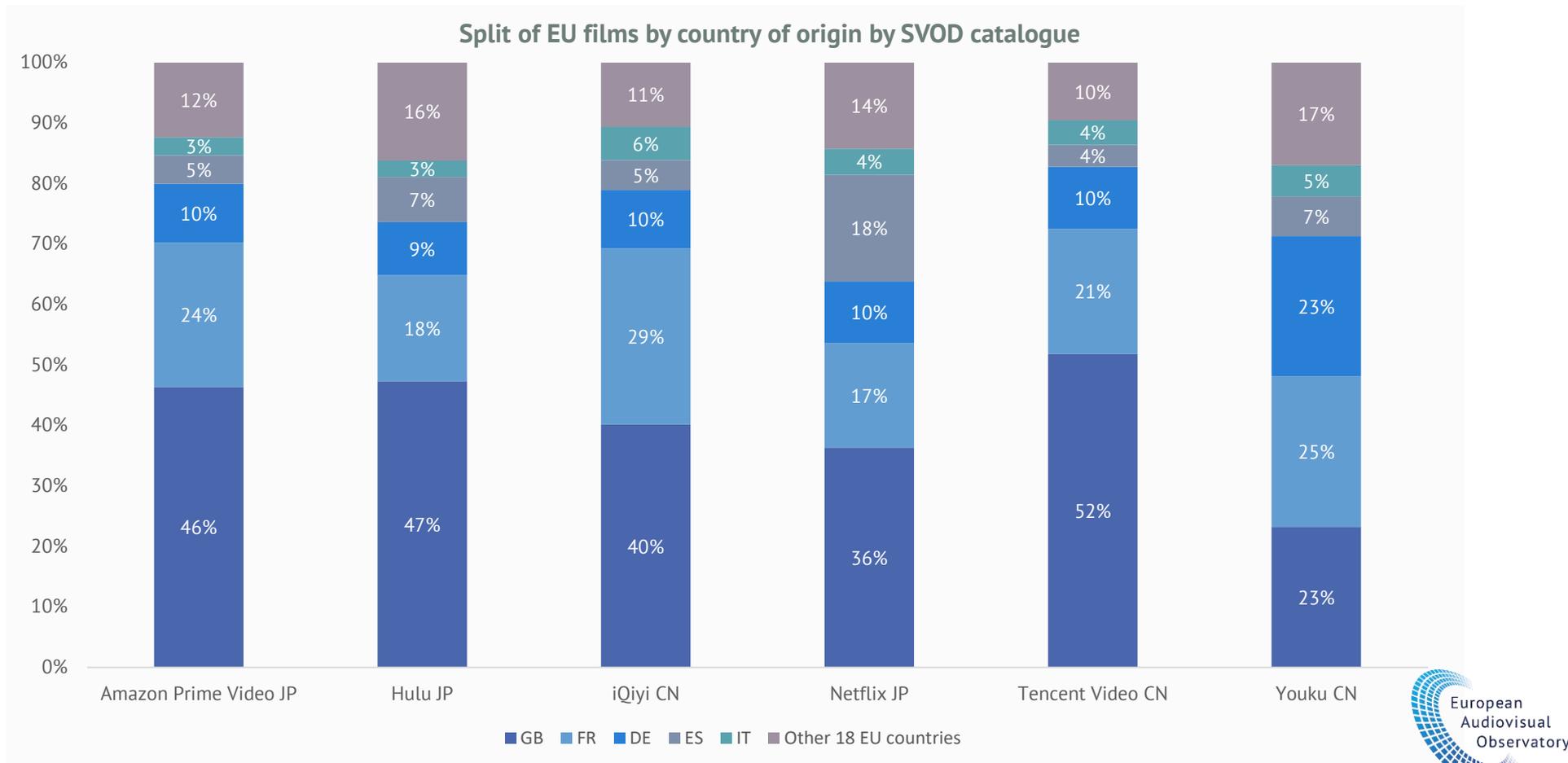
Overview of EU 28 shares by SVOD catalogue



Total films per catalogue					
Amazon Prime Video JP	Hulu JP	iQiyi CN	Netflix JP	Tencent Video CN	Youku CN
1 603	1 979	8 426	3 614	6 170	10 642

Diverse EU film offering by Chinese SVOD services

- ▶ Youku in China offers the most diverse EU films offering, followed by the Japanese Netflix catalogue
- ▶ In Japan, importance of British films for EU film offering highlighted by Hulu and Amazon



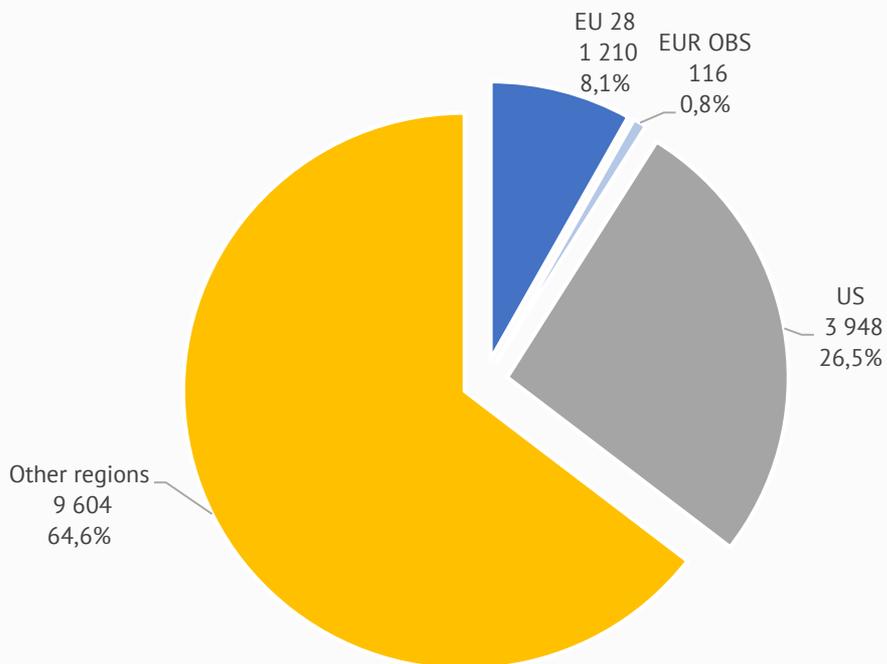
India 6 SVOD services



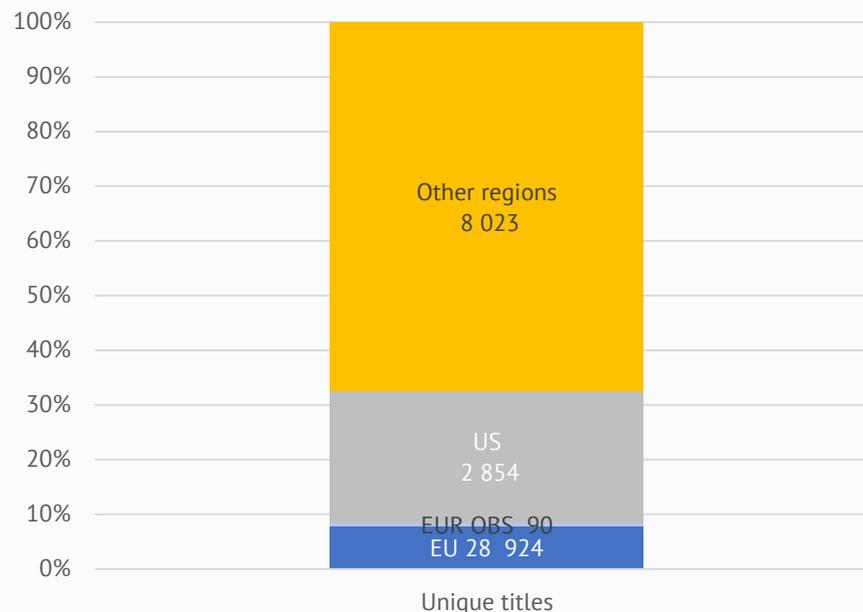
8% of films available are of EU origin in India – reliance on national films

- ▶ EU 28 films represent 8,1% of films available on the 6 Indian SVOD services
- ▶ Indian services rely mostly on national films with an average share of 57% of Indian films in the catalogues (or 88% of all films of ‘other regions’).
- ▶ EU unique titles represent 7,7% of all unique titles – the lowest of all regions

14 878 occurrences of films by region of origin



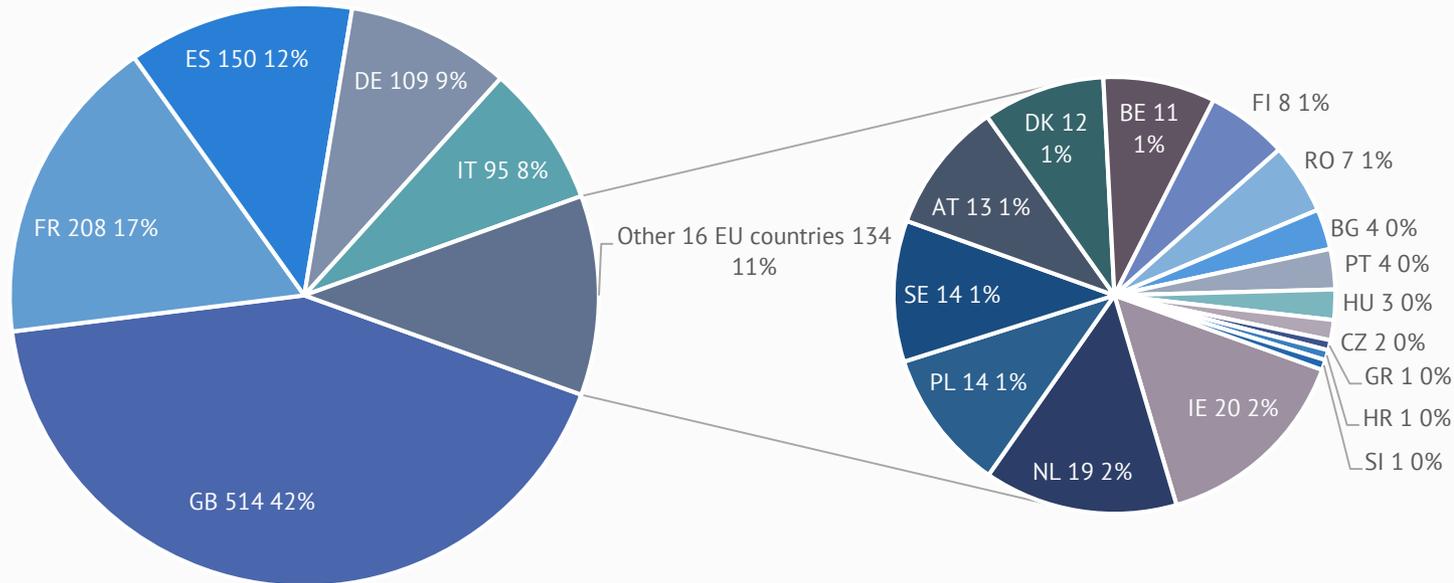
11 891 occurrences of films by region of origin



English language explains the high share of British films in EU film offering

- ▶ EU-5 films make up almost 90% of EU film offering.
- ▶ With 3 SVOD catalogues entirely focused on Indian films, EU films are mostly offered by global players Amazon and Netflix

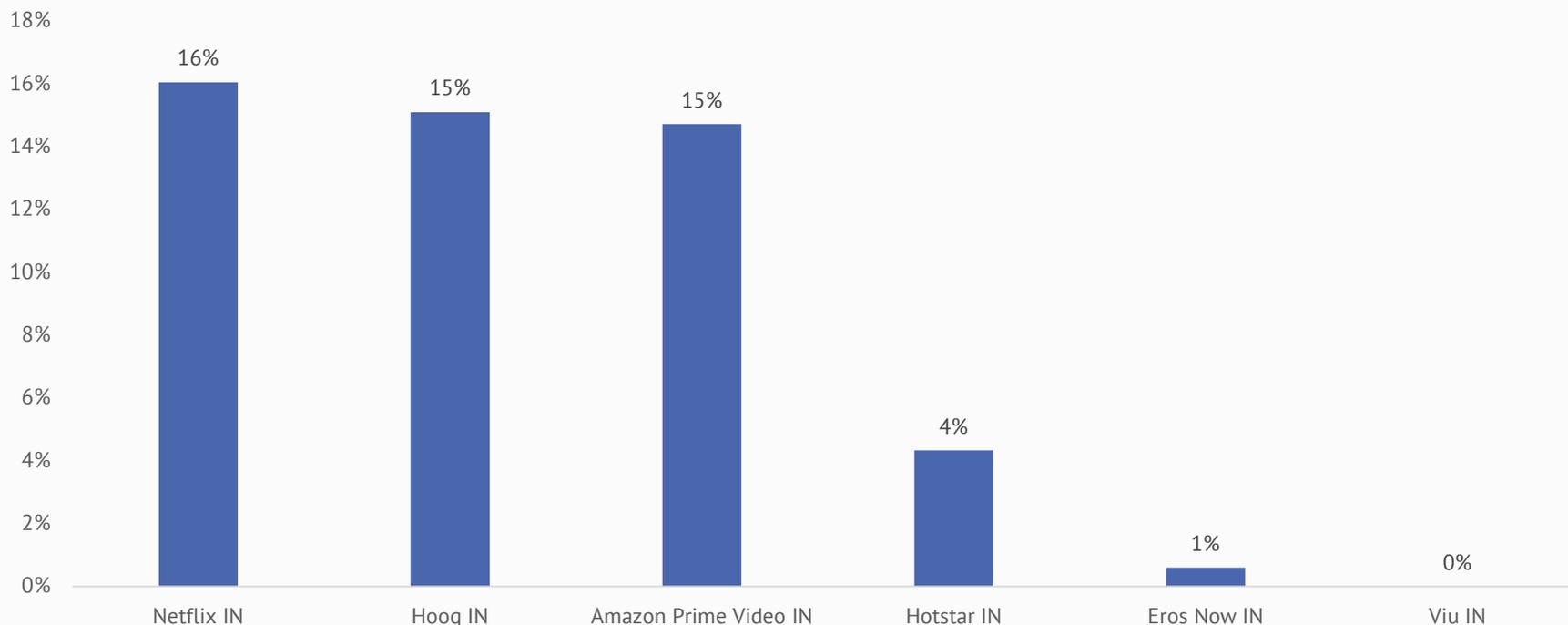
1 210 occurrences of EU films by country of origin



Indian films dominate the catalogues of national services, international services rely also on EU films

- ▶ While international services Netflix, Amazon and Hooq have a comparatively high share of EU films in their catalogues, national services HotStar and Eros Now rely mostly on national films, with respectively 75% and 98% of Indian films in their catalogues. Viu has also 96% of national films.
- ▶ India is one of the biggest film producing countries in the world, and this production fills in local services

Overview of EU 28 shares by SVOD catalogue

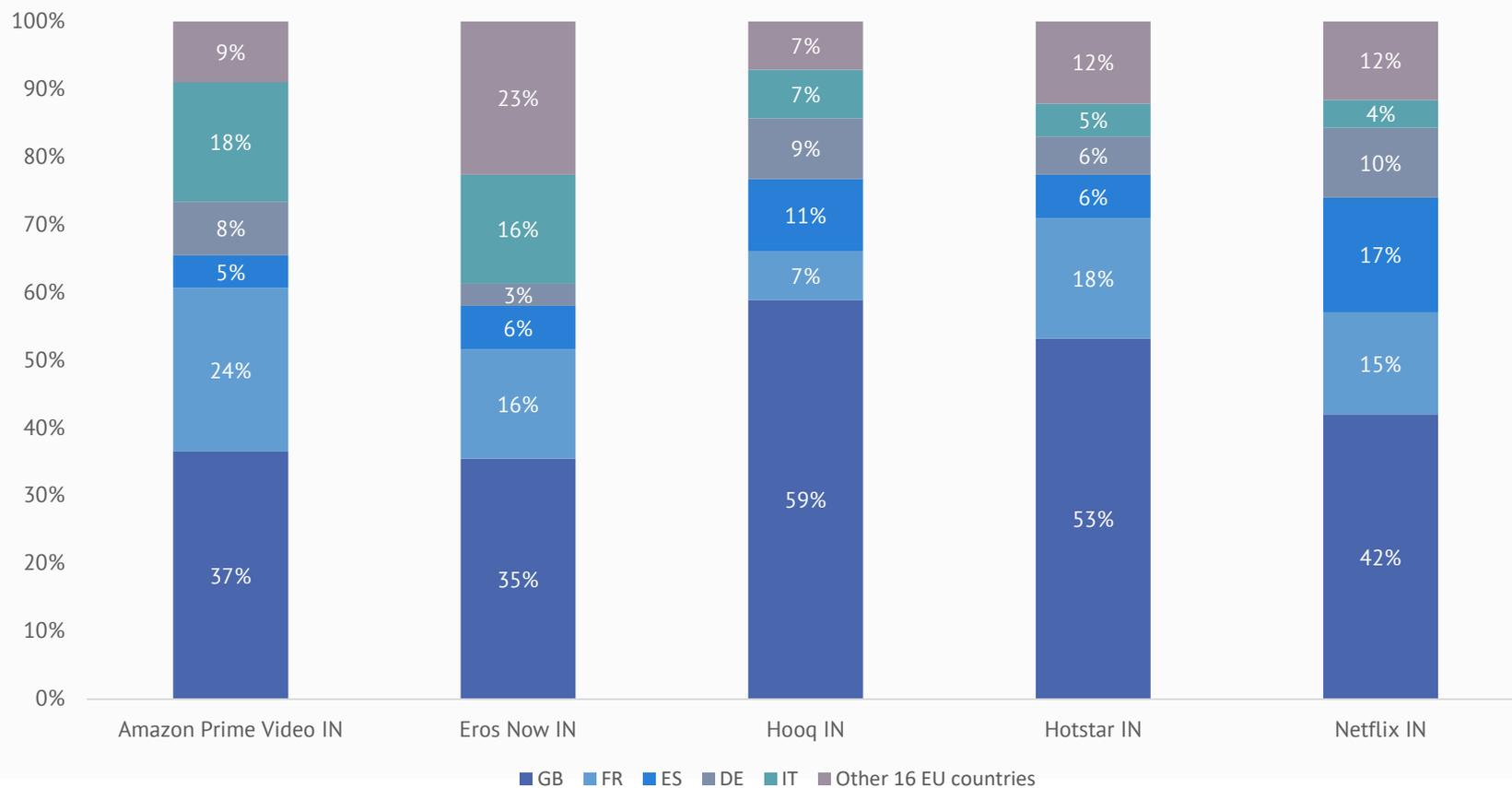


Total films per catalogue

Amazon Prime Video IN	Eros Now IN	Hooq IN	Hotstar IN	Netflix IN	Viu IN
1 971	5 172	371	2 863	4 420	81

French films second to British films, high share of Spanish film in Netflix' catalogue

Split of EU films by country of origin by SVOD catalogue



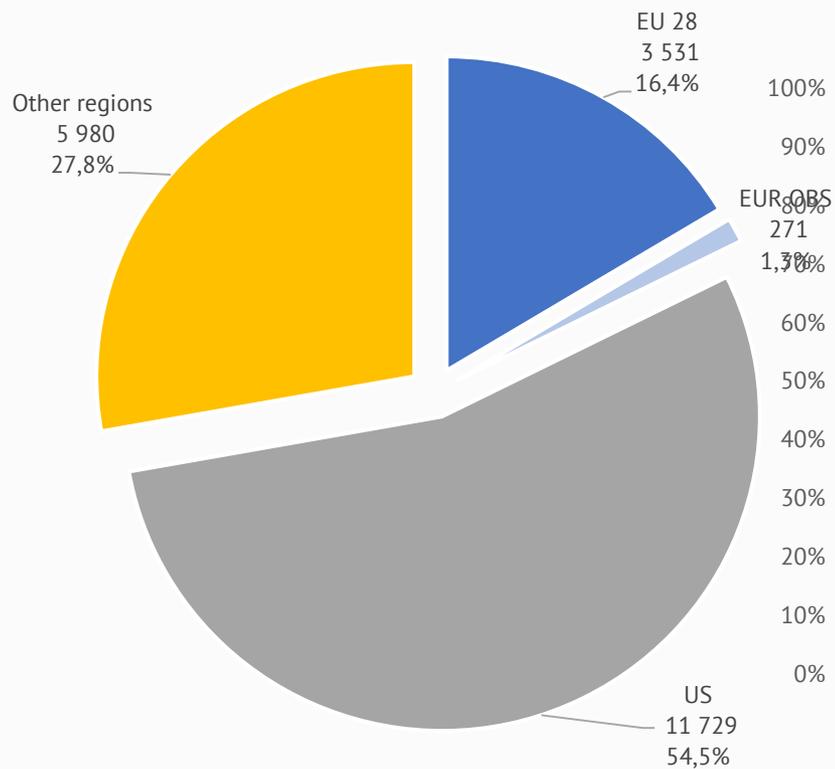
Australia & New Zealand 8 SVOD services



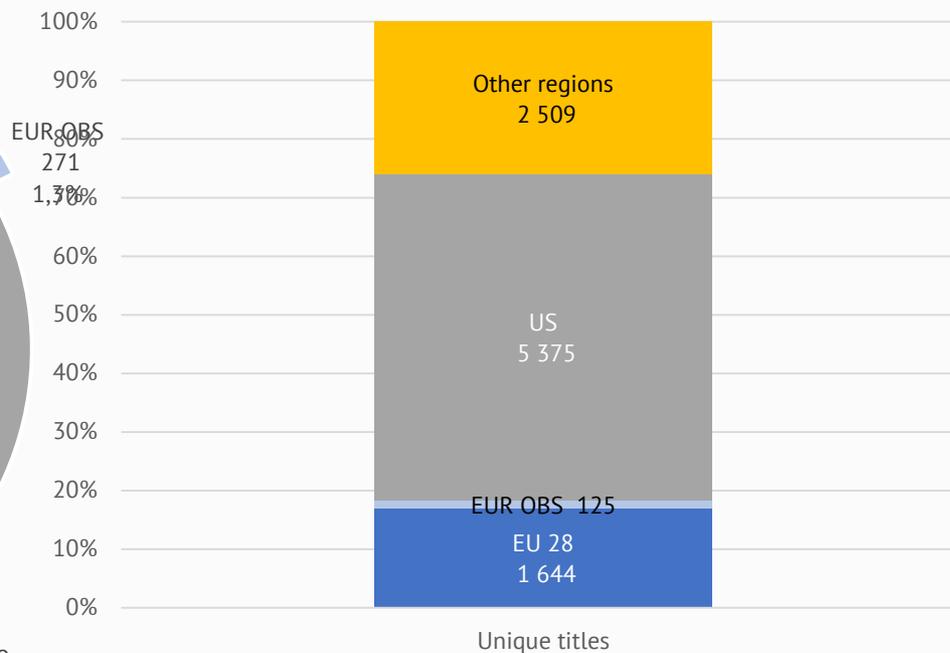
16% of films available are of EU origin in Oceania

- ▶ EU 28 films represent **16,4% of films** available on the 8 SVOD services for a total of 3 531 films.
- ▶ The share of national films is at 2,7% in Australia and 0,3% in New Zealand.
- ▶ EU unique film titles represent 17% of all unique film titles available

21 511 occurrences of films by region of origin



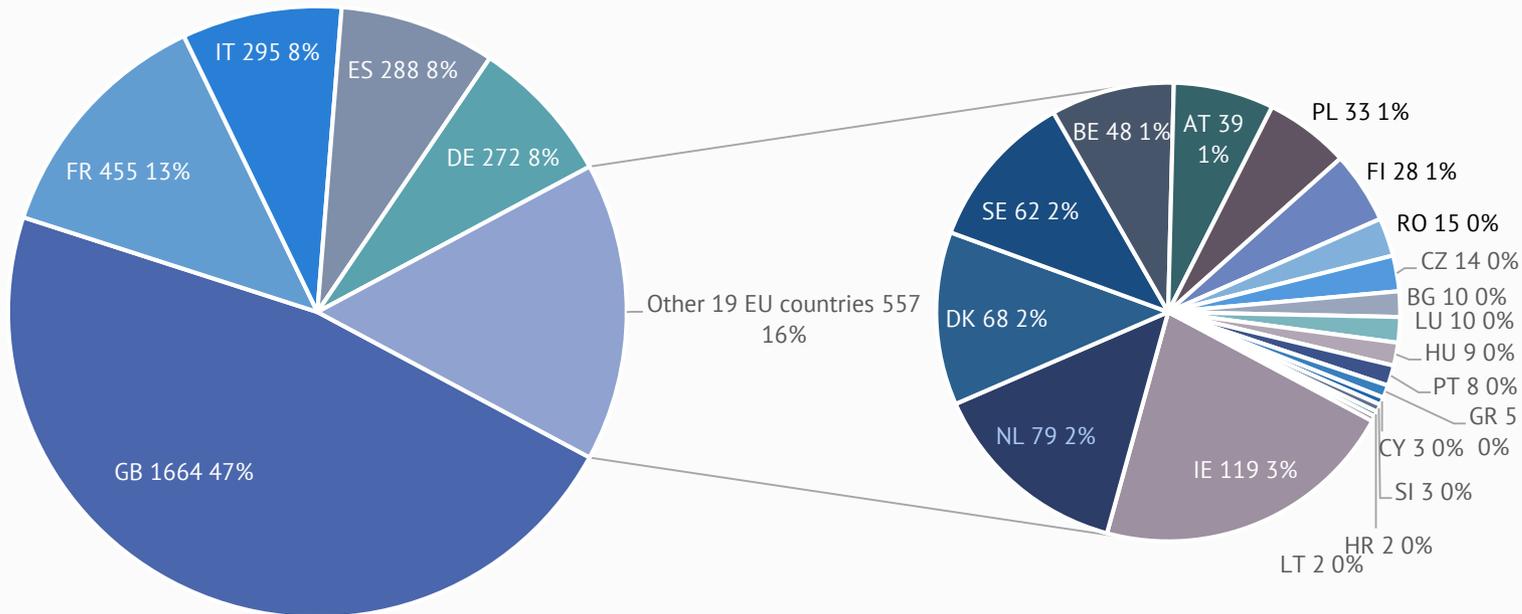
9 653 unique film titles



Dominance of English-speaking films in Oceania

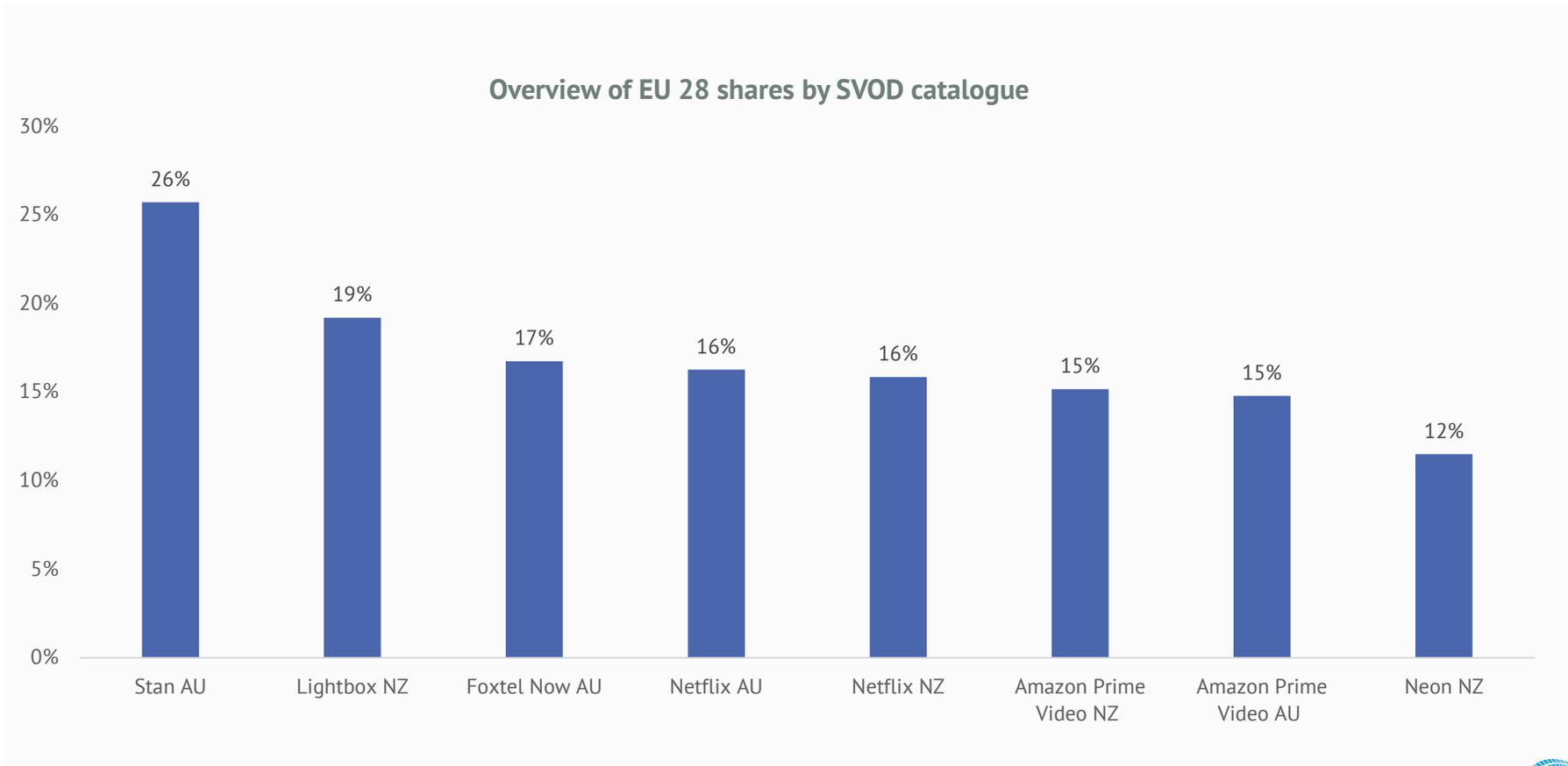
- ▶ **EU-5 represent 84% of all EU films** with British and Irish films accounting for half of all EU films – Proximity of language

3 531 occurrences of EU films by country of origin



National players are offering a higher share of EU films than global players

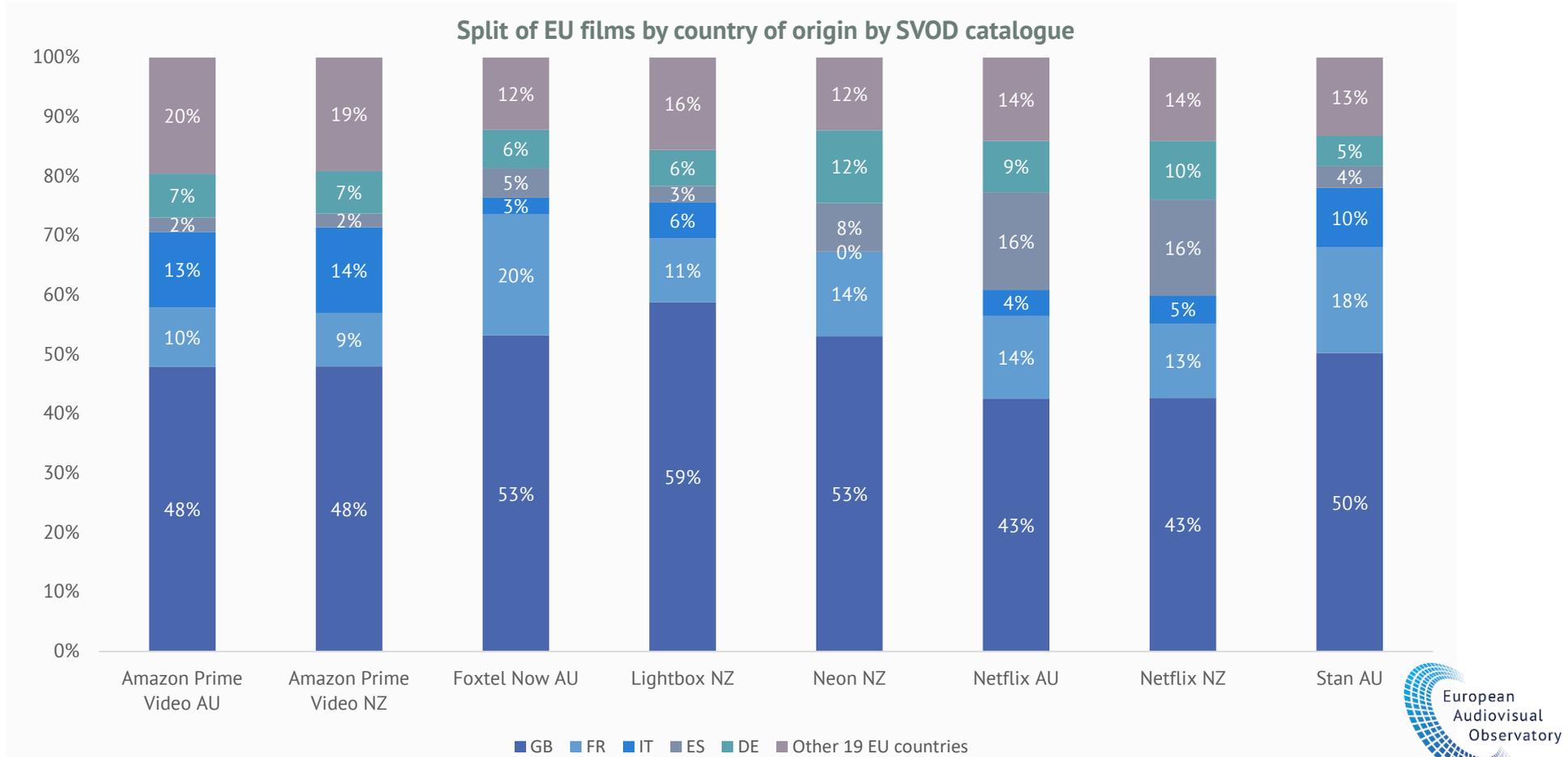
While in most of the regions, global players offered the highest share in their catalogues to EU films, this situation is inverted in Australia and New Zealand with national players Stan, Foxtel and Lightbox having the highest share of EU films in their catalogues.



Total films per catalogue							
Amazon Prime Video AU	Amazon Prime Video NZ	Foxtel Now AU	Lightbox NZ	Neon NZ	Netflix AU	Netflix NZ	Stan AU
4 673	3 969	1 672	771	426	4 418	3 988	1 594

High importance of British films in all catalogues – language proximity

- ▶ Foxtel Now and Stan meanwhile have the highest share of French films in their EU film offering while Netflix has the highest share of Spanish films, which the service tends to circulate in most countries in which it is operating.



Middle East

Egypt, Saudi Arabia and United Arab Emirates

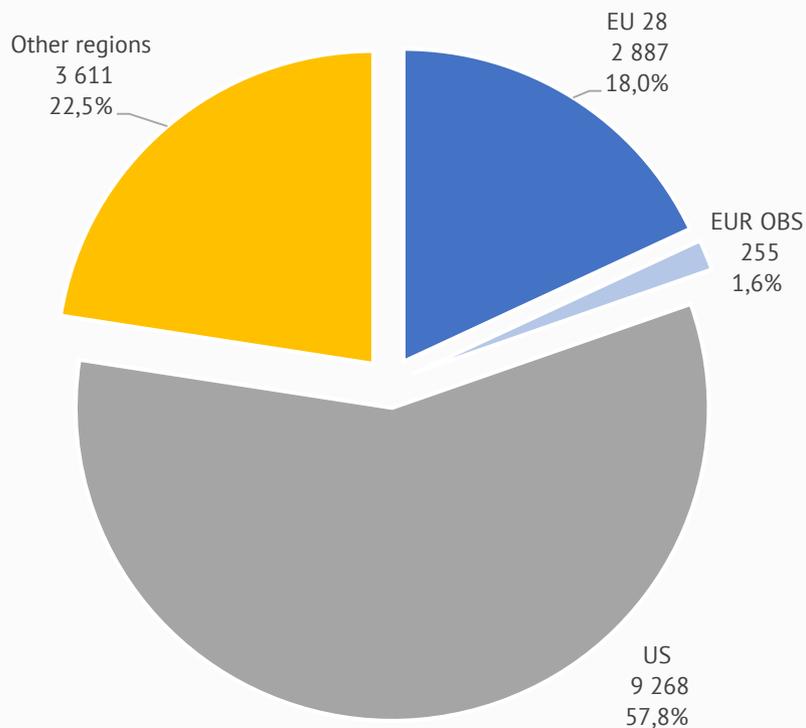
11 SVOD services



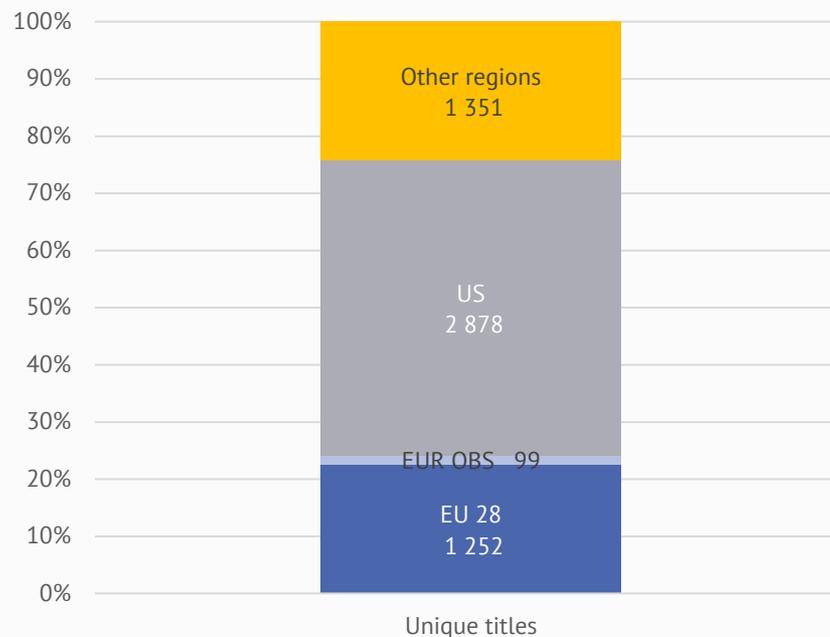
18% of films available are of EU origin in the Middle East

- ▶ EU 28 films represent 18% of films available on services in the Middle East
- ▶ EU unique titles represent 22,4% of all unique titles available in the region

16 021 occurrences of films by region of origin



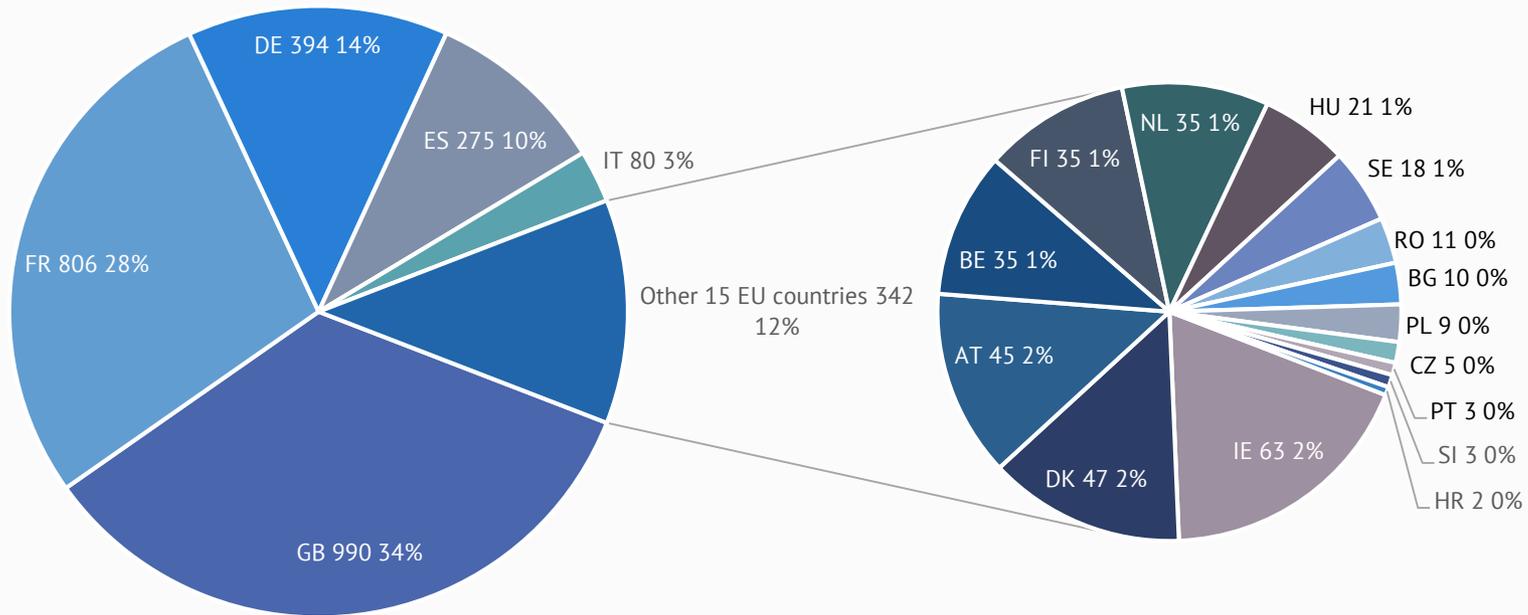
5 580 unique titles by region of origin



British, French and Spanish films are the main source of EU films in the Middle East

- ▶ EU-5 represent 88% of all EU films and British films 34% of all EU films.
- ▶ High appeal of French films which represent 28% of all EU films – one of the highest share throughout all regions.

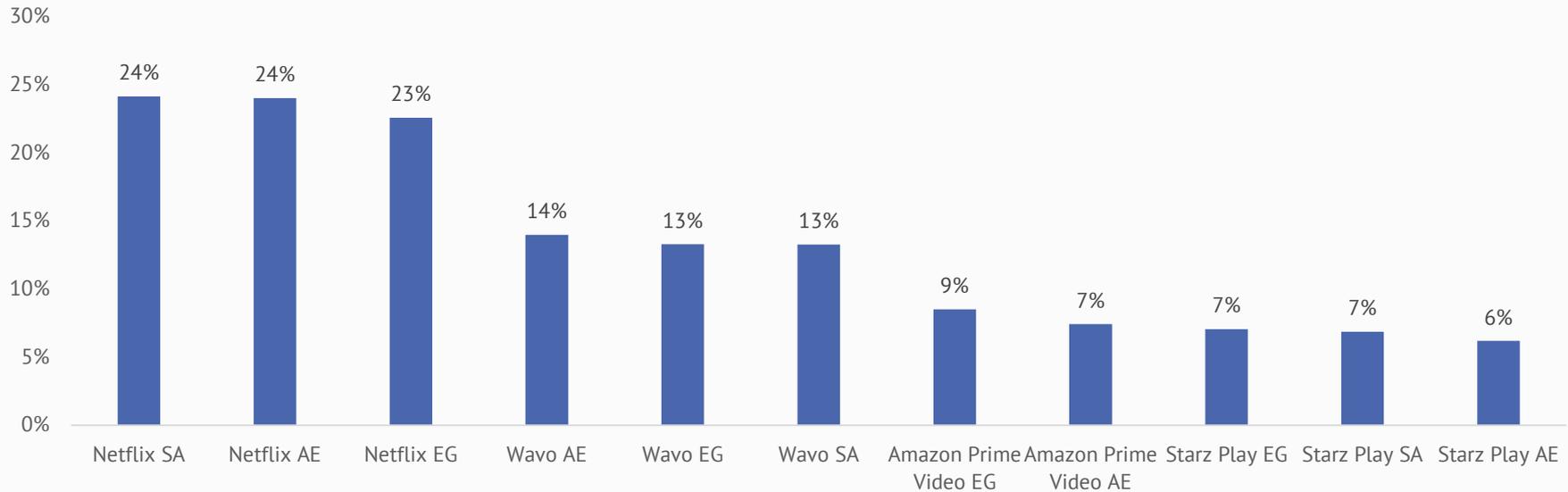
2 887 occurrences of EU films by country of origin



Netflix offering a high share of EU films in its country catalogue

- Regional player Starz Play has the catalogues with the lowest share of EU films, while Amazon has also a significant low share of EU films in its regional catalogues compared to other region in which the service operates.

Overview of EU 28 shares by SVOD catalogue

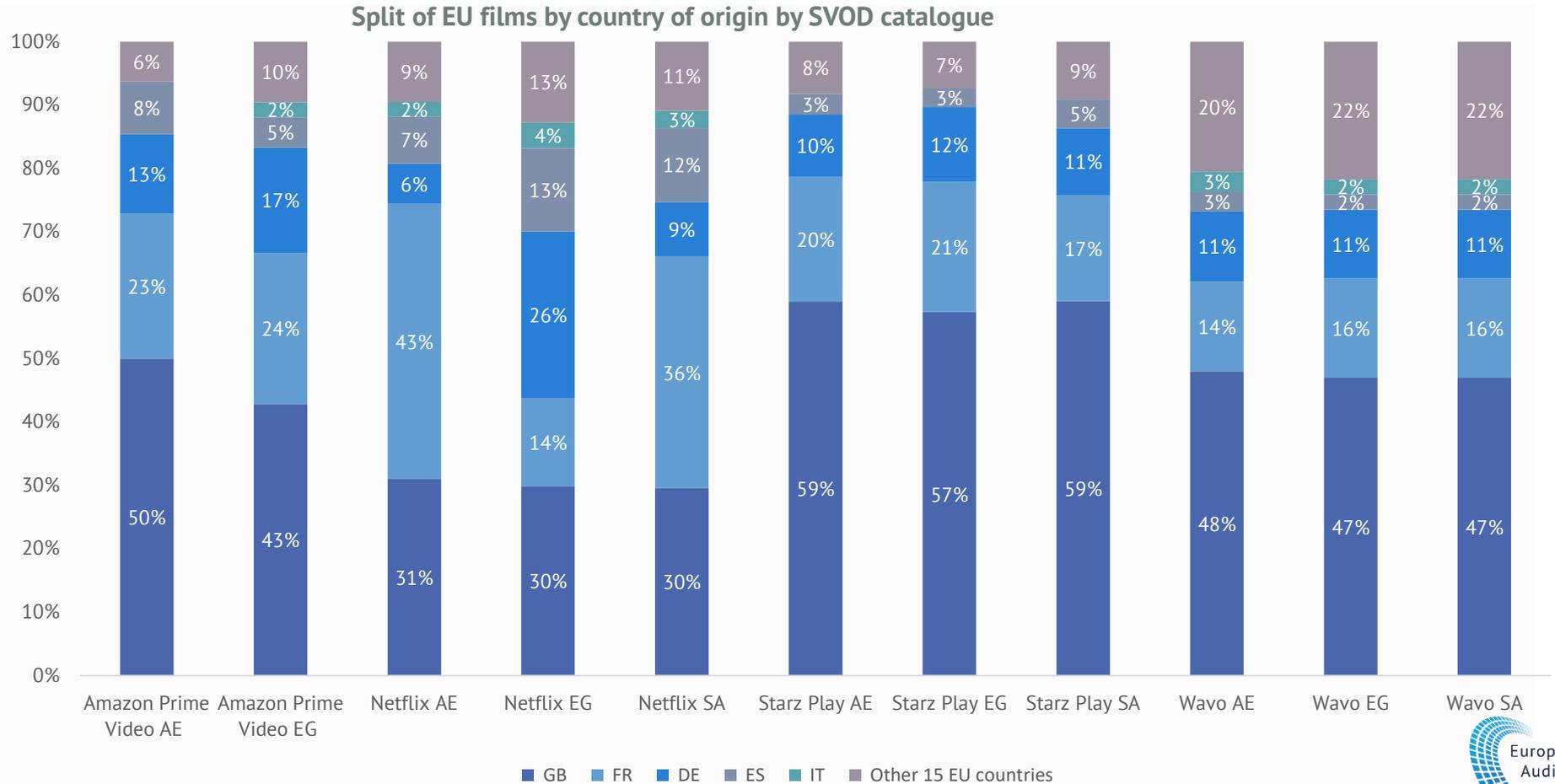


Total films per catalogue

Amazon Prime Video AE	Amazon Prime Video EG	Netflix AE	Netflix EG	Netflix SA	Starz Play AE	Starz Play EG	Starz Play SA	Wavo AE	Wavo EG	Wavo SA
646	494	2 686	3 583	3 543	984	964	961	909	625	626

Netflix is more relying on films of diverse EU countries than its competitors

▶ Almost all catalogues rely on British films for half of their EU films. Regional players Wavo has the highest share of film from other EU countries while Netflix has the most diverse catalogue, with a surprising high share of German film in its Egyptian catalogue and French share in the catalogues in Saudi Arabia and the United Arab Emirates.



Details by individual countries

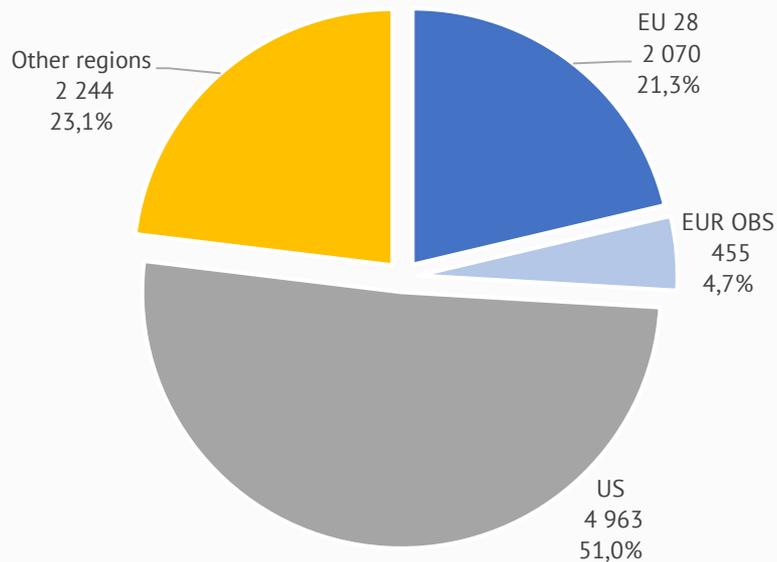
Russia, South Africa and Turkey
6 SVOD services



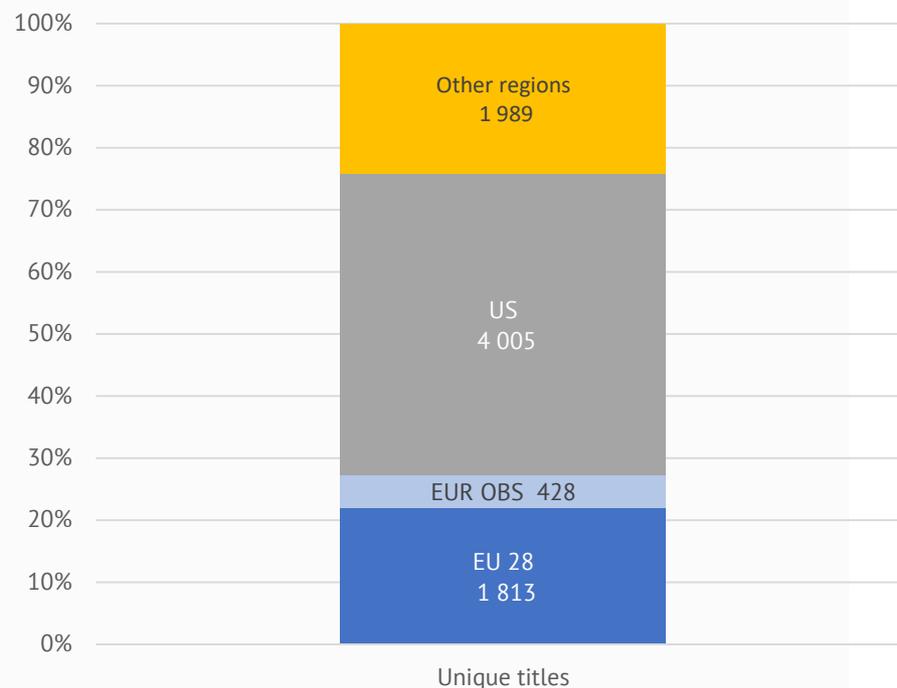
21,3% of films available are of EU origin in Russia

- ▶ EU 28 films represent **21,3% of films** available on the 3 SVOD services in Russia
- ▶ Share of national films on average 3,5%
- ▶ EU unique titles represent 22% of all unique titles

9 732 occurrences of films by region of origin



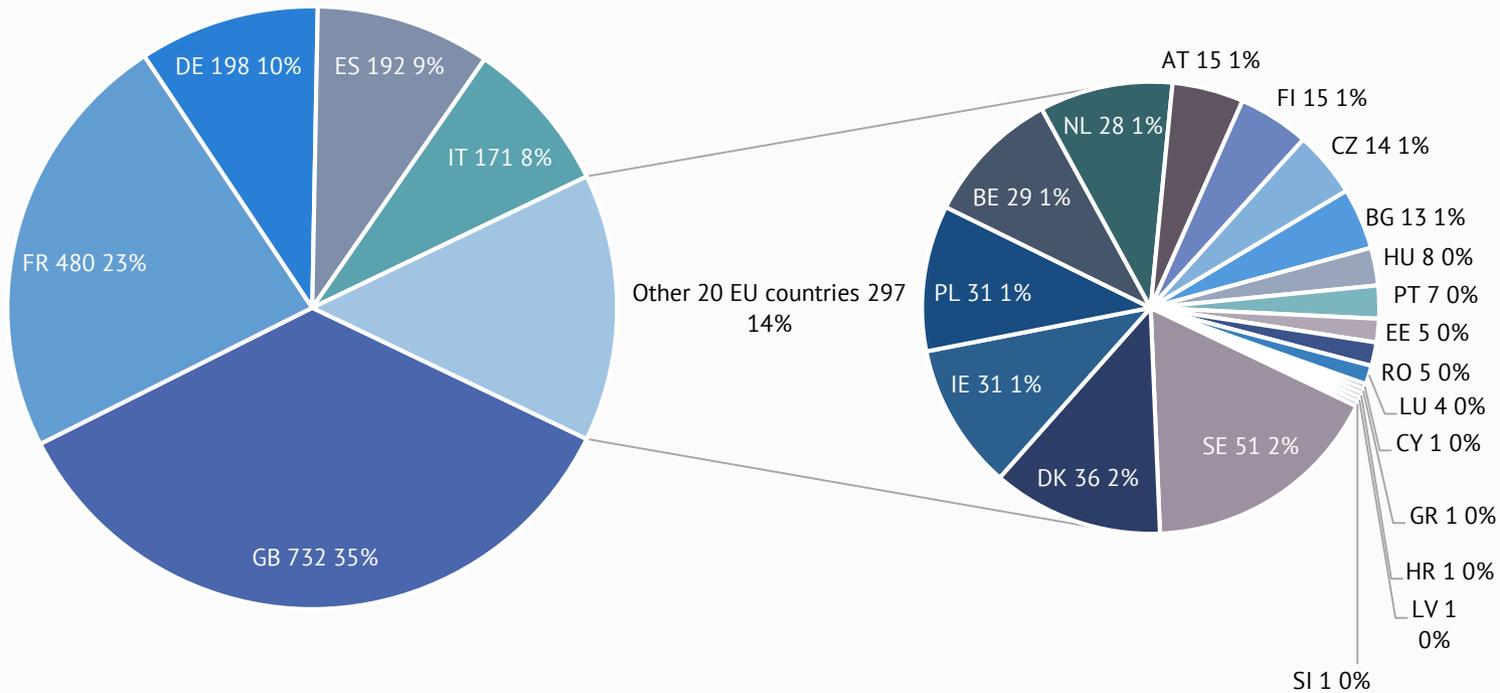
8 235 unique titles by region of origin



British and French films are the main source of EU films in Russia

- ▶ EU-5 films represent 86% of all EU films
- ▶ Nordic films accounted for 5% of all EU films

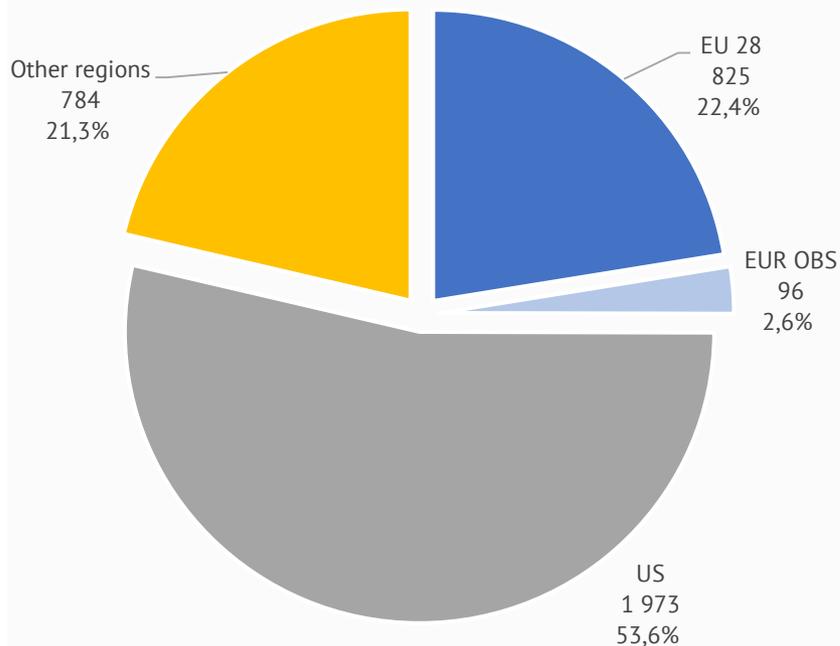
2 070 occurrences of EU films by country of origin



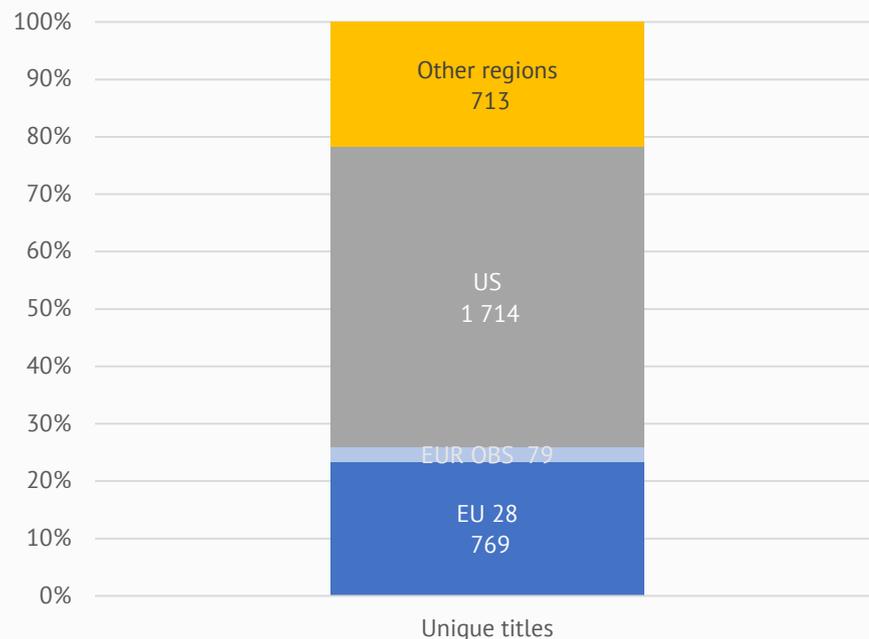
22,4% of films available are of EU origin in Turkey

- ▶ EU 28 films represent **22,4% of films** available on the 2 SVOD services in Turkey
- ▶ Share of national films on average 2,2%
- ▶ EU unique titles represent **23,5%** of all unique titles

3 678 occurrences of films by region of origin



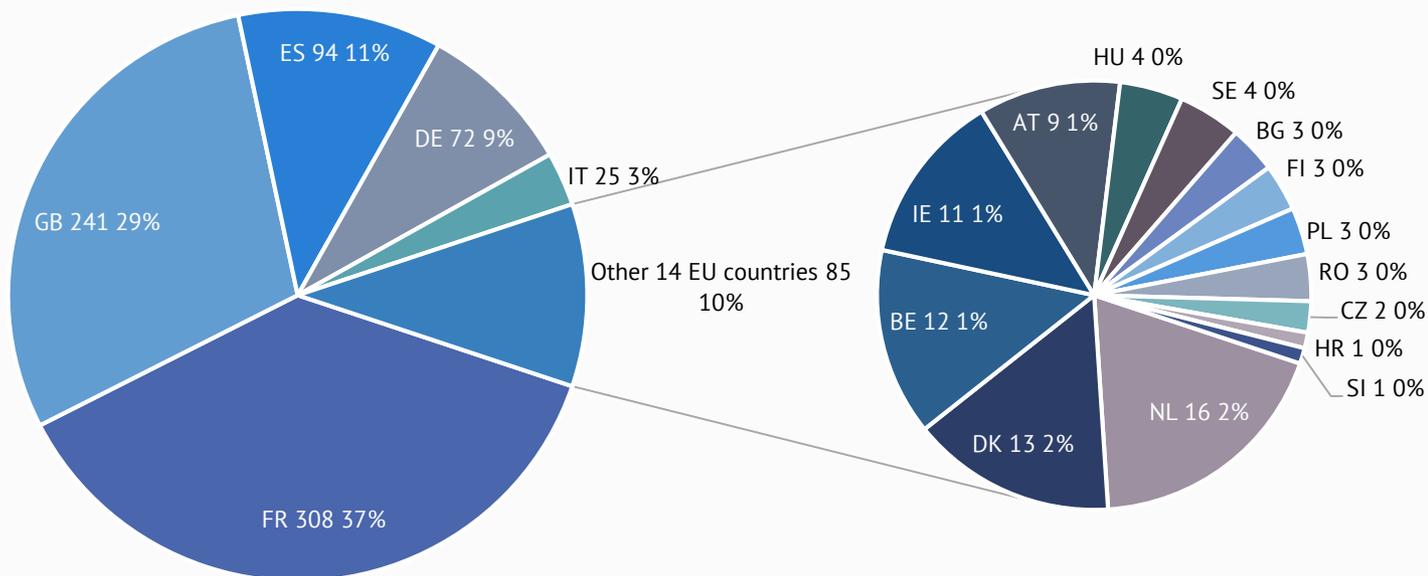
3 275 unique titles by region of origin



French films are the main source of EU films in Turkey, accounting for more than 1/3

- ▶ EU-5 represent 90% of all EU films
- ▶ Only country in which French films more present than British films

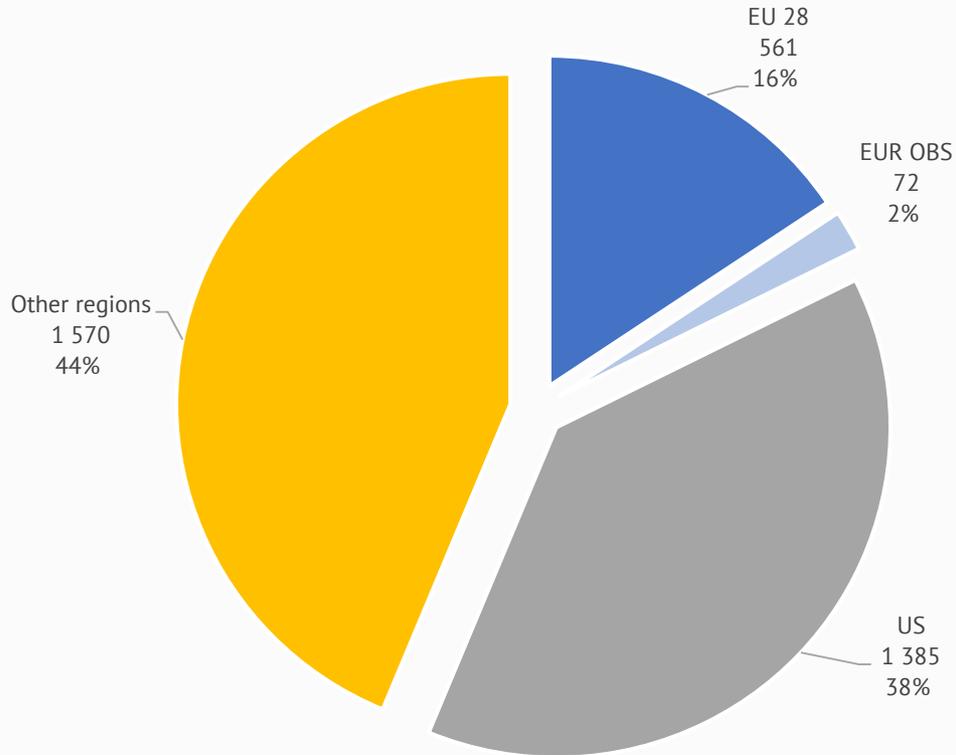
825 occurrences of EU films by country of origin



22,4% of films available are of EU origin on Netflix in South Africa

- ▶ EU 28 films represent **16% of films** available on Netflix in South Africa
- ▶ Share of national films is at 0,1% (4 films)

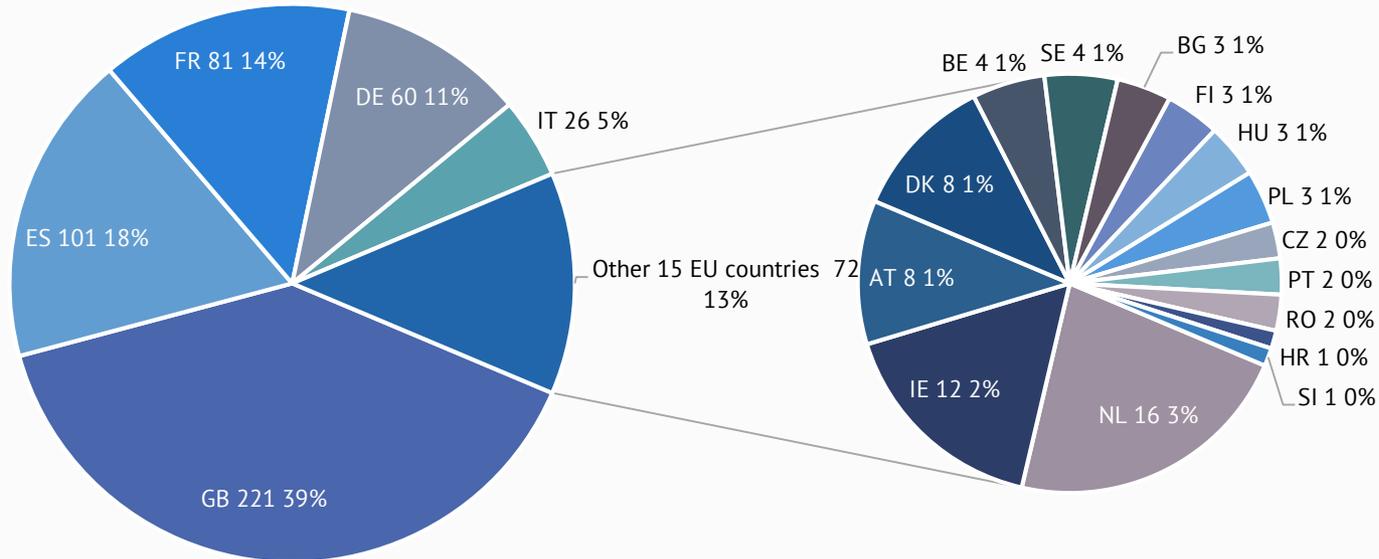
3 588 occurrences/unique film titles by region of origin



British films well ahead in the Netflix catalogue

- ▶ EU-5 represent 87% of all EU films
- ▶ English-speaking films represent 41% of all EU films – Proximity of language
- ▶ Variety in EU countries of origin as it was the case in other Netflix catalogues

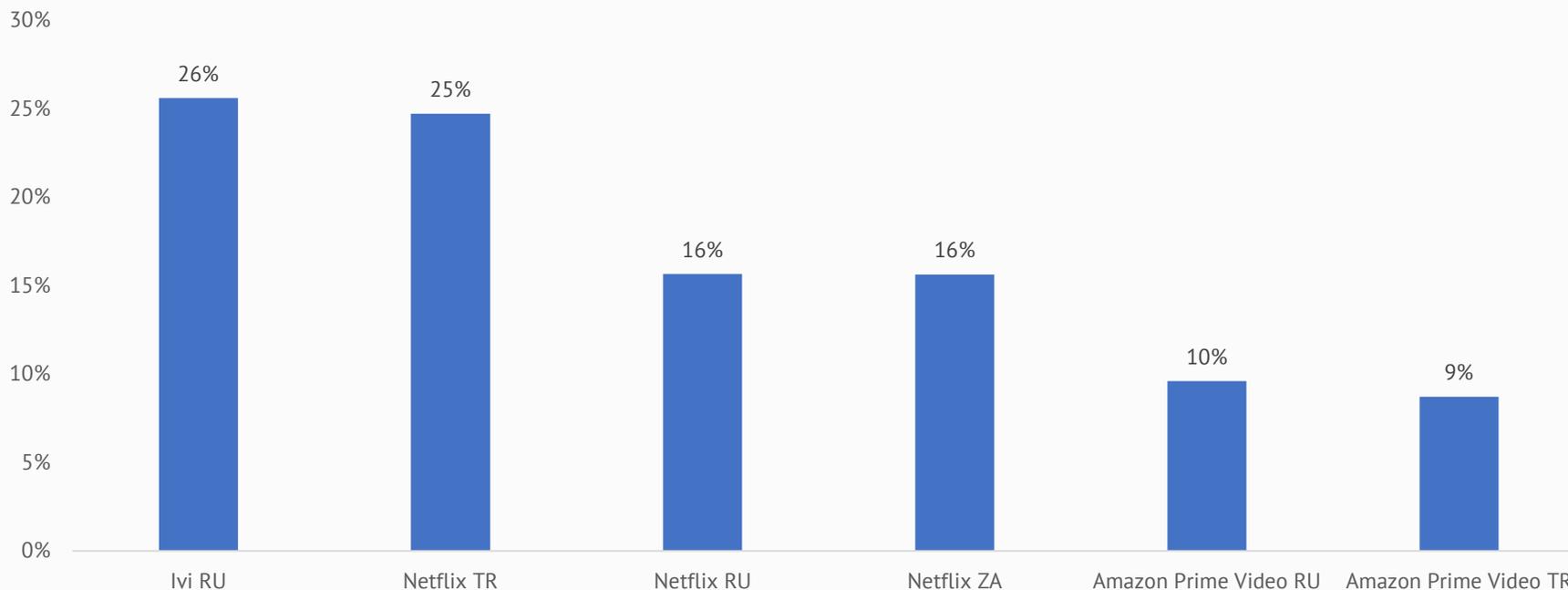
561 EU films by country of origin



Russian player Ivi has the highest share of EU films, followed by Netflix in the 3 countries

- ▶ While Ivi boasts the highest share, Netflix in Turkey dedicates ¼ of its film offering to EU films.
- ▶ Amazon on the other hand in Turkey and Russia, has a low amount of films and a low amount of EU films in its offering.

Overview of EU 28 shares by SVOD catalogue



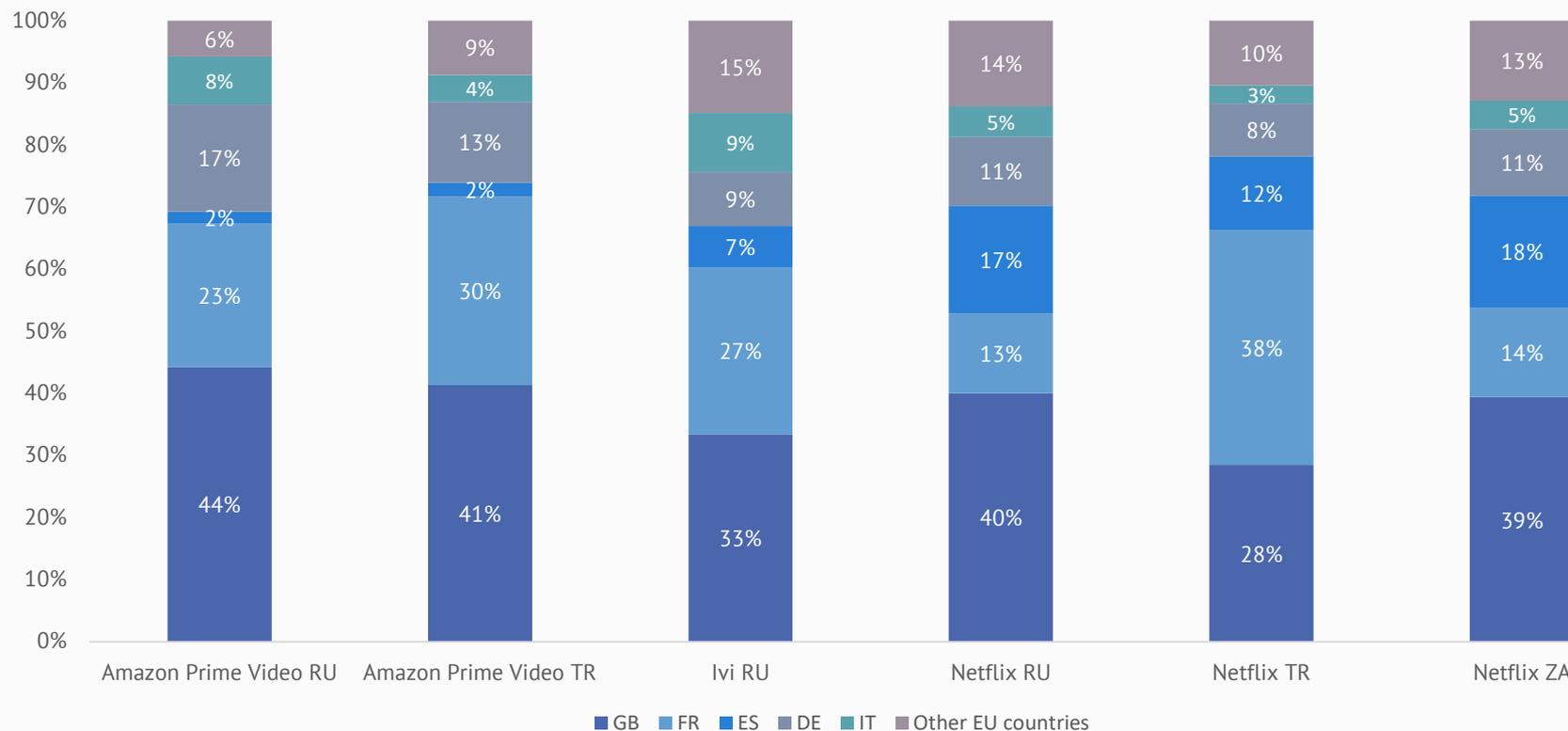
Total films per catalogue

Amazon Prime Video RU	Amazon Prime Video TR	Ivi RU	Netflix RU	Netflix TR	Netflix ZA
541	528	5 809	3 382	3 150	3 588

Diverse film offering of EU films for all players in the 3 countries.

- ▶ French films have a comparatively high share in 4 out of the 6 country catalogues compared to other regions.
- ▶ High share of German films in the EU film offering of Amazon in Russia and Turkey.

Split of EU films by country of origin by SVOD catalogue



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