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Introduction

The aim of this report is to provide a second global insight into the composition of TVOD and SVOD catalogues in the 27 Member States of the European Union (hereafter EU27), looking at both film titles and TV seasons. Please note that, for lack of data, replay and AVOD services are not in the scope of this report.

The report addresses 7 research questions:

- What is the average and median size of TVOD and SVOD catalogues, for film and TV content?
- What are the regions of origin of unique titles in VOD catalogues?
- What are the shares of films and TV content by region of origin in VOD catalogues?
- On average, what is the country and service circulation of unique titles by region of origin?
- Which players offer the largest number of film and TV content, and what are the shares of this content by region of origin?
- What is the share of national and EU27 non-national works in VOD catalogues?
- Which EU27 production countries are the main exporters of film and TV titles on VOD in the EU27?

For film data, 138 TVOD catalogues in 20 EU countries and 420 SVOD catalogues in 26 EU countries were analysed based on JustWatch, Filmtoro, La Pantalla Digital, Chili and EUROVOD catalogue data. The data was collected in June 2021 and the titles were matched through databases with their countries of production. The consistency of data is obtained by matching each entry of each catalogue with a unique original title.

For TV content, the analysis was based on JustWatch data from 307 SVOD catalogues in 19 EU countries and on 49 TVOD catalogues in 13 EU countries. The data was collected in June 2021 and the TV seasons were matched through databases with their countries of production.
Methodology

For the origin of a title, only the first country of production was considered. This approach is a proxy, as in a limited number of cases, minority coproductions can be considered as national productions by coproductions agreements.

4 regions of origin are considered: ‘EU27’ titles have an EU27 country as first production country, ‘Other European’ (EUR OBS) titles have as a first production country a European country part of the European Audiovisual Observatory, ‘US’ titles from the United States of America and ‘Other region’/‘Other international’ for titles from all other origins.

The shares included in this report are only indicative and minor identification errors might have occurred: about 3% of all titles are not identified and are not included in the statistics presented in this report.

Please quote this report as “Film and TV content in VOD catalogues – 2021 edition”, European Audiovisual Observatory.

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Methodology: glossary

TVOD (Transaction Video On Demand): services where consumers can rent or purchase a work on a title-per-title basis.

SVOD (Subscription Video On Demand): services which propose for a monthly fee a catalogue of works available on-demand.

VOD (Video On Demand): in the context of this report, all TVOD and SVOD services of the sample.

Catalogue: the full list of titles made available by a SVOD or TVOD service. Each country catalogue of global services is accounted for separately.

Film: all feature films, fiction films, documentaries or other contents available in the “Film” / “Movie” section of the TVOD and SVOD catalogue are considered.

TV content: all content classified under as “TV” on TVOD and SVOD catalogue is considered.

Unique titles: different titles present at least once in at least once catalogue. The number of presences is not considered. Titles available both in TVOD and in SVOD are deduplicated when considering all TVOD and SVOD catalogues.

Cumulated titles: sum of presence in catalogues for each different title.

Category of players: the service final owner main activity:

- Rightsholder – Distributor/Producer: a company exploiting rights and having moved direct-to-consumer by launching a VOD service.
- Private Equity: a VOD service controlled by investment funds.
- Pure VOD players: a company whose main/sole activity is the operation of a VOD service.
- Film Institute: a public film institute managing its own VOD service.
- Tech: a company also present in sectors other than audiovisual (e.g., Internet services, Consumer Electronics, e-commerce etc.)
- Telecom: a company whose main activity is the operation of telecommunications networks.
- TV: a company whose main activity is broadcasting.
Main findings – Film and TV content

This section builds on the analysis of film + TV seasons put together, on TVOD and SVOD. The samples for film and TV content being partially different, these results should be taken as indicative.
Average size of catalogues: far more films than TV seasons, mainly on TVOD

- On average, there were more film titles than TV seasons, mainly on TVOD (7 times more).
- TV content offer was on average bigger on TVOD than on SVOD.

Size of TVOD catalogues in average number of titles

- 5,744 total titles
  - 707 film titles
  - 5,037 TV seasons

Size of SVOD catalogues in average number of titles

- 1,330 total titles
  - 522 film titles
  - 808 TV seasons

Note: Average refers to the total number of titles in catalogues divided by the total number of catalogues for TVOD and SVOD services, respectively.

Source: JustWatch, Filmto, Chili, La Pantalla Digital, EUROVOD catalogue data
The median film title offer was 13 times bigger than the TV seasons offer on TVOD, but very similar on SVOD.

TVOD services built their catalogues on film, while SVOD were more balanced.

Size of TVOD catalogues in median number of titles

- TVOD: 3,724 (282 film, 4,006 TV)
- SVOD: 969 (467 film, 502 TV)

Note: the Median is calculated separately for film and TV content, and for TVOD and SVOD respectively.

Source: JustWatch, Filmtero, Chili, La Pantalla Digital, EUROVOD catalogue data
The offer of unique film titles was much higher than the offer of unique TV seasons, with 7 times more unique film titles than TV seasons on TVOD, and 5 times more on SVOD.

In total, TVOD services offered more unique titles than SVOD services.

**Unique titles by business model**, in number of titles

- **TVOD**
  - Film titles: 62,717
  - TV seasons: 8,766

- **SVOD**
  - Film titles: 58,805
  - TV seasons: 12,358

Source: JustWatch, Filmto, Chili, La Pantalla Digital, EUROVOD catalogue data
Origin by region: SVOD more European and Asian; TVOD strongly built on US

- EU27 content accounts for 23% of all film titles and TV seasons found on EU27 VOD services in June 2021.
- European content (EU27 and other European titles) reached 33% of total on VOD.

Source: JustWatch, Filmto, Chili, La Pantalla Digital, EUROVOD catalogue data
EU27 content accounts for 22% on TVOD, 24% on SVOD.
European content (EU27 and other European titles) account for 32% on TVOD and 35% on SVOD.
On SVOD, TV content from other international origins represented 1 in 5 titles and were mainly Japanese titles (anime) composed of numerous seasons.

Origin of film and TV seasons found on TVOD

- EU27: 156,006 (22%)
- Other European: 74,921 (10%)
- Other Intl.: 78,569 (11%)

Total: 724,591 films and TV seasons

Origin of film and TV seasons found on SVOD

- EU27: 116,327 (24%)
- Other Intl.: 105,060 (21%)
- Other European: 53,061 (11%)
- US: 218,968 (44%)

Total: 493,416 films and TV seasons

Source: JustWatch, Filmtooru, Chili, La Pantalla Digital, EUROVOD catalogue data
On TVOD, EU27 content circulated in less countries than the content from all other regions. And films from all origins circulated better than TV seasons.

On SVOD also, EU27 content circulated less than titles of other origins. Here, TV seasons from US and other international origins circulated better than film titles.

**Circulation on TVOD by number of countries**

- EU27: 2.7
- Other European: 5.2
- US: 7.3
- Other Intl.: 4.9

**Circulation on SVOD by number of countries**

- EU27: 3.9
- Other European: 4.8
- US: 6.9
- Other Intl.: 6.9

How to read these graphs: on average, a EU27 film available on TVOD in a least one country is available in 2.7 countries.

Source: JustWatch, Filmto, Chili, La Pantalla Digital, EUROVOD catalogue data
Films circulated in far more catalogues than TV seasons on TVOD. TV seasons circulated in more service catalogues than films on SVOD except for European content (EU27 and other European).

On TVOD, other European content (incl. the UK) showed the second best circulation, while on SVOD, TV seasons from other intl. regions and films from other European showed second best circulation.

US titles showed the widest catalogue circulation on VOD.

How to read these graphs: on average, a EU27 film available on TVOD in a least one catalogue is available in 4.7 catalogues.

Source: JustWatch, Filmotoro, Chili, La Pantalla Digital, EUROVOD catalogue data
Tech and pure VOD players offer the largest amount of films and TV seasons

- On TVOD, the bulk of film titles and TV seasons (70%) was found in catalogues of tech players.
- On SVOD, pure VOD players and tech players offered almost two thirds of all film titles and TV seasons.
- Most works available on TVOD (90%) and on SVOD (80%), are offered by tech players, pure VOD players and telecom players.
- TV players adopted twice as much the SVOD business model than TVOD.

**TVOD – Films and TV seasons in catalogues**

<table>
<thead>
<tr>
<th>Core business</th>
<th>Number of TVOD catalogues</th>
<th>Average number of titles per catalogue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Film Institute</td>
<td>1</td>
<td>67</td>
</tr>
<tr>
<td>Private Equity</td>
<td>6</td>
<td>8 138</td>
</tr>
<tr>
<td>Pure VOD player</td>
<td>37</td>
<td>1 996</td>
</tr>
<tr>
<td>Rightsholder - Distributor/Producer</td>
<td>20</td>
<td>1 731</td>
</tr>
<tr>
<td>Tech</td>
<td>87</td>
<td>8 249</td>
</tr>
<tr>
<td>Telecom</td>
<td>20</td>
<td>6 132</td>
</tr>
</tbody>
</table>
| TV                            | 16                        | 5 217                                  

**SVOD – Films and TV seasons in catalogues**

<table>
<thead>
<tr>
<th>Core business</th>
<th>Number of SVOD catalogues</th>
<th>Average number of titles per catalogue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Film Institute</td>
<td>1</td>
<td>727</td>
</tr>
<tr>
<td>Private Equity</td>
<td>10</td>
<td>575</td>
</tr>
<tr>
<td>Pure VOD player</td>
<td>120</td>
<td>2 497</td>
</tr>
<tr>
<td>Rightsholder - Distributor/Producer</td>
<td>302</td>
<td>376</td>
</tr>
<tr>
<td>Tech</td>
<td>127</td>
<td>1 989</td>
</tr>
<tr>
<td>Telecom</td>
<td>64</td>
<td>1 955</td>
</tr>
</tbody>
</table>
| TV                            | 103                       | 1 514                                  

Note: TVOD catalogues, on the one hand, and SVOD catalogues, on the other hand, are not deduplicated.

Source: JustWatch, Filmto, Chili, La Pantalla Digital, EUROVOD catalogue data
EU27 non-national content represented the largest share of EU27 content, on both types of services but especially on SVOD where it represented three fourths of the total EU27 content offer.

A higher share of national content was present on TVOD catalogues, more eager to provide local content to their clients.

Source: JustWatch, Filmto, Chili, La Pantalla Digital, EUROVOD catalogue data
Almost half of the exported TV content offer on TVOD was German and French. While EU-4 were the top exporting countries for films on TVOD, this was not true for TV content. Scandinavian content (SE, DK) also reached export success, notably for TV seasons.

**Origin of EU27 non-national film titles on TVOD**
- FR: 28%
- DE: 21%
- IT: 10%
- ES: 7%
- SE: 5%
- DK: 5%
- NL: 4%
- BE: 4%
- AT: 3%
- IE: 3%
- FI: 2%
- PL: 2%
- CZ: 1%
- 14 other EU27 countries: 5%

**Origin of EU27 non-national TV seasons on TVOD**
- DE: 29%
- FR: 19%
- SE: 11%
- IT: 6%
- AT: 8%
- DK: 7%
- IE: 4%
- NL: 4%
- ES: 3%
- CZ: 2%
- 11 other countries: 5%

Source: JustWatch, Filmtoro, Chili, La Pantalla Digital, EUROVOD catalogue data
EU27 non-national content exported on SVOD: again mainly French and German

- On SVOD, the most exported content was French (around 25% for both films and TV seasons).
- Germany, Spain and Italy complete the top EU-4 export countries for films and TV seasons on SVOD, while for films, Swedish titles exported better than Spanish.
- Films and TV seasons from other origins included Scandinavian, Irish, Belgian and Dutch content.

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**Origin of EU non-national film titles on SVOD**

- FR: 25%
- DE: 17%
- IT: 10%
- SE: 8%
- ES: 7%
- AT: 5%
- CZ: 5%
- NL: 3%
- BE: 3%
- RO: 2%
- PT: 2%
- IE: 1%
- 13 other EU27 countries: 6%

**Origin of EU non-national TV seasons on SVOD**

- FR: 24%
- DE: 25%
- ES: 12%
- IT: 7%
- SE: 6%
- DK: 6%
- NL: 2%
- IE: 5%
- BE: 5%
- CZ: 1%
- AT: 1%
- 12 other countries: 2%

Source: JustWatch, Filmtoro, Chili, La Pantalla Digital, EUROVOD catalogue data
Films in VOD catalogues in the EU27

Overview of
138 TVOD catalogues
and
420 SVOD catalogues
Strong differences between national and multi-country catalogues

TVOD catalogues, multi-country and national, showed a larger film offer than SVOD catalogues. For SVOD, national services had a slightly higher average number of films than multi-country catalogues, which also reflects the recent launch of many specialised niche multi-country SVOD services (documentary and art house mainly).

### Size of TVOD film catalogues, in number of films

<table>
<thead>
<tr>
<th></th>
<th>Average number of films</th>
<th>Median number of films</th>
</tr>
</thead>
<tbody>
<tr>
<td>Multi-country TVOD</td>
<td>103</td>
<td>35</td>
</tr>
<tr>
<td>National TVOD</td>
<td>3 523</td>
<td>1 304</td>
</tr>
</tbody>
</table>

### Size of SVOD film catalogues, in number of films

<table>
<thead>
<tr>
<th></th>
<th>Average number of films</th>
<th>Median number of films</th>
</tr>
</thead>
<tbody>
<tr>
<td>Multi-country SVOD</td>
<td>805</td>
<td>843</td>
</tr>
<tr>
<td>National SVOD</td>
<td>256</td>
<td>410</td>
</tr>
</tbody>
</table>

**Note:** Average refers to the total number of films in catalogues divided by the total number of catalogues for TVOD and SVOD services, and for multi-country and national services, respectively. The median is calculated separately for TVOD and SVOD services, and for multi-country and national services, respectively.

**Source:** JustWatch, Filmtdro, Chili, La Pantalla Digital, EUROVOD catalogue data
And huge disparities in the number of films for TVOD and SVOD services

The maximum and minimum number of films show that multi-country TVOD (and some SVOD) services were more focused on a high amount of films than other service types.

The disparities in the maximum and minimum number of films between the same types of services show however that some services might also have been more focused on curation of films or had an offer more focused on other types of content than films (TV content, niche content).

### Maximum number of films in catalogue by business model

<table>
<thead>
<tr>
<th>Business Model</th>
<th>Maximum Number of Films</th>
</tr>
</thead>
<tbody>
<tr>
<td>Multi-country SVOD</td>
<td>27,262</td>
</tr>
<tr>
<td>Multi-country TVOD</td>
<td>20,314</td>
</tr>
<tr>
<td>National TVOD</td>
<td>12,928</td>
</tr>
<tr>
<td>National SVOD</td>
<td>4,188</td>
</tr>
</tbody>
</table>

### Minimum number of films in catalogue by business model

<table>
<thead>
<tr>
<th>Business Model</th>
<th>Minimum Number of Films</th>
</tr>
</thead>
<tbody>
<tr>
<td>Multi-country TVOD</td>
<td>28</td>
</tr>
<tr>
<td>National TVOD</td>
<td>27</td>
</tr>
<tr>
<td>Multi-country SVOD</td>
<td>14</td>
</tr>
<tr>
<td>National SVOD</td>
<td>12</td>
</tr>
</tbody>
</table>

Source: JustWatch, Filmotoro, Chili, La Pantalla Digital, EUROVOD catalogue data
Average and median values do not reflect the enormous disparities in the numbers of films in each VOD catalogue. For TVOD, catalogue sizes vary from 20,314 films to 27 films – 40 catalogues have less than 1,000 films while 57 catalogues have more than 5,000 films.

For SVOD, sizes vary from 27,262 films to 12 films – 25 catalogues have more than 3,000 films while 124 catalogues have less than 100 films.

Source: JustWatch, Filmotor, Chili, La Pantalla Digital, EUROVOD catalogue data
The bulk of films available on both TVOD and SVOD were less than 10 years old.

- More than 50% of all films available on SVOD were produced in 2013 or later and 57% were less than 10 years old in 2021.
- More than 50% of all films available on TVOD were produced in 2012 or later and 52% were less than 10 years old in 2021.

Source: JustWatch, Filmotor, Chili, La Pantalla Digital, EUROVOD catalogue data
B.2 – Unique film titles available in VOD catalogues

On TVOD and SVOD combined, over **85 600 unique film titles** were available
- EU27 unique film titles were the most represented with **36%** of all unique film titles with 30 762 titles.
- US film titles followed with 30 063 titles or **35%** of overall unique titles.
- Other European titles made up 10% of titles with 8 373 titles, with British titles making up **76%** of all Other European titles on TVOD, 70% on SVOD.

A **larger choice of unique titles on TVOD**
- With over 62 700 titles, TVOD services had a larger film title offer than SVOD services with 58 805 titles.

And also, a **larger offer of EU27 unique film titles on TVOD services**
- With **38%** of all unique titles being of EU27 origin, representing 25 590 unique film titles, TVOD services offered a larger choice than SVOD services’ 19 970 unique EU27 film titles or **34%** of all film titles available on SVOD.

French, German, Italian and Spanish titles make up the bulk of EU titles, both on TVOD and SVOD
- With **29%** of EU27 titles, French titles were the most found titles on TVOD, followed by German titles with 21%, Italian with 13% and Spanish with 8%.
- On SVOD, German titles represented **24%** of all EU27 titles, French 20%, Italian 15% and Spanish 7%.
- The rest of the top production countries’ origin of EU27 titles, both on TVOD and SVOD, were Belgian, Danish, Austrian, Swedish, Dutch, Czech, Finnish and Polish titles.
- The rest of **15 EU27 countries** made up **5%** of all titles on TVOD and **7%** on SVOD with just over 1 000 titles on both types of services.
- Nordic films (DK, FI, SE) represented 10% of all EU27 titles on TVOD and 11% on SVOD.
85,698 unique film titles were available to customers on both types of services. For EU27 films, French, German, Italian, and Spanish titles represented 68% of all unique EU27 film titles and Nordic films (DK, FI, SE) 10%.

2,745 film titles could not be identified and have been excluded from the analysis. They represent 3.1% of all collected film titles.
A larger choice of unique titles on TVOD

TVOD services offered the highest number of total unique films titles, with over 62 000 titles available. On TVOD services, EU27 unique film titles represented 38% of all unique titles, on SVOD 34%.

On both types of services, US titles represented 37% and 36% of all titles. Other European titles, including British titles, made up around 10% on both types of services.

Origin of unique film titles in TVOD catalogues

- EU 27: 23 590 (38%)
- US: 23 425 (37%)
- Other European: 6 429 (10%)
- Other international: 9 273 (15%)

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

*On TVOD, 1 403 film titles have not been identified (2.2 % of all film titles), on SVOD the number of unidentified titles was 1 554 or 2.6 % of all titles. They have been excluded for the analysis.
Differences in the origin of EU titles by business model

On TVOD, French titles are the most represented EU27 titles while on SVOD German titles took the lead.
French, German, Italian and Spanish titles represented 71% of all EU27 titles on TVOD, 66% on SVOD.
Nordics titles (DK, FI, SE) represented 10% of all EU27 titles on TVOD, 11% on SVOD.

Source: JustWatch, Filmctoro, Chili, La Pantalla Digital, EUROVOD catalogue data
The importance of GB titles among “other European” film titles

British titles represented 76% on TVOD and 70% on SVOD of all other European titles available. Russian, Turkish, Swiss and Norwegian titles completed the top 5 of other European titles, far behind British titles.

Source: JustWatch, Filmtoro, Chili, La Pantalla Digital, EUROVOD catalogue data
B.3 – Origin and circulation of films

24% of all films found in 138 TVOD and 420 SVOD catalogues were of EU27 origin
- Titles from other European countries made up 10% on TVOD and SVOD, mainly from the United Kingdom.
- US titles made up 57% of films on TVOD and 42% on SVOD.
- Films from other regions had a much larger share on SVOD with 20% than on TVOD with 11%.

For both business models, national services offered a higher share of EU27 films than multi-country services
- In the 35 national TVOD catalogues, EU27 films represented 41% of all films, on 39 national SVOD services their share was 39%.
- Other European films for both types of national services made up 10% of the film offering, here again largely composed of films of the United Kingdom.
- US films represented 38% of all films on national TVOD services and 41% on national SVOD services.

EU27 films on multi-country services made up 27% of all films in 381 SVOD catalogues and 17% in 103 TVOD catalogues
- Other European films accounted for 10% in multi-country TVOD and SVOD catalogues.
- US films accounted for the lion share with 62% on multi-country TVOD catalogues and 42% on SVOD (similar to the share for national SVOD catalogues).
- Films of other regions accounted for 11% on multi-country TVOD services but 21% on multi-country SVOD catalogues, reflecting the recent evolution into the acquisition of films of more regions by global SVOD players.

On average, an EU27 film title was available in 2.7 countries on TVOD and in 3.9 countries on SVOD
- Other European film titles were available on average in 5.2 countries on TVOD and 4.8 countries on SVOD.
- This circulation compares to 7.3 countries for US titles on TVOD and 5.4 countries on SVOD.
- On services, EU27 titles circulated on average on 6.3 TVOD services and on 4.7 SVOD services compared to 16.9 TVOD services and 6.6 SVOD services for US titles.
- The circulation on SVOD services is also limited by the necessity to acquire rights for each country which is not the case for TVOD services.
24% of all films in VOD catalogues (TVOD and SVOD) were of EU27 origin

- In total, over 1 million films were present in the 558 VOD catalogues (TVOD and SVOD) of the sample.
- EU27 films represented 24% of all films available, while other European films accounted for 10%.
- The biggest EU27 production countries were France with 28% of all EU27 films, followed by Germany with 23%, Italy with 10%, and Spain 6%. These 4 countries accounted for 68% of all EU27 and Nordic films (DK, FI, SE) 12%.
- US films with 52% accounted for the lion share of films available in VOD catalogues.

**Origin of EU27 films in 558 VOD catalogues by country of origin**

- **FR** 68 586 (28%)
- **DE** 55 567 (23%)
- **IT** 24 151 (10%)
- **US** 536 123 (52%)
- **Other 15 EU countries** 15 248 (6%)
- **Other European** 103 484 (14%)

*On TVOD, 5 203 films have not been identified (0.7% of all films), on SVOD the number of unidentified films was 6 327 or 1.9% of all films. They have been excluded for the analysis.*
28% of all films on SVOD and 22% on TVOD are of EU27 origin

- In terms of availability, EU27 films represented 22% in all TVOD catalogues and 28% in SVOD catalogues.
- Other European films represented 10% of all films on TVOD and SVOD services.
- US films had a higher share in TVOD catalogues with 57% of all films and 42% in SVOD catalogues.
- Films of other regions were better represented in SVOD catalogues with 20% compared to 11% in TVOD catalogues, showing the increased reliance of SVOD services on productions from around the world to complete their catalogues.

**Origin of films in 138 TVOD catalogues**

- **US**: 395,350 (57%)
- **EU27**: 147,553 (22%)
- **Other European**: 70,574 (10%)
- **Other international**: 76,479 (11%)

**Origin of films in 420 SVOD catalogues**

- **US**: 140,773 (42%)
- **EU27**: 94,671 (28%)
- **Other European**: 64,835 (20%)
- **Other international**: 32,910 (10%)

*On TVOD, 5,203 films have not been identified (0.7% of all films), on SVOD the number of unidentified films was 6,327 or 1.9% of all films. They have been excluded for the analysis.*
National services had a higher share of EU27 films

National services, for TVOD and SVOD, relied more on EU27 films to cater to national audiences than multi-country services, with respectively 41% and 39% of EU27 films in their film catalogues.

National TVOD and SVOD services complemented their film offering with films from other European countries and other regions which made up 10% of each of their catalogues, on average.

The reliance on US films was also lesser for national services than multi-country services, especially for TVOD.

**Origin of films in 35 national TVOD catalogues**

- EU27: 50,660 (41%)
- US: 46,627 (38%)
- Other European: 11,883 (10%)
- Other international: 13,511 (11%)

**Origin of films in 39 national SVOD catalogues**

- EU27: 12,800 (39%)
- US: 13,479 (41%)
- Other European: 3,237 (10%)
- Other international: 3,132 (10%)

Source: JustWatch, Filmto, Chili, La Pantalla Digital, EUROVOD catalogue data
While multi-country services rely more on US films and less on EU27 films

- Multi-country TVOD services relied more on US films than SVOD services, with a share of 62% for TVOD and 42% for SVOD.
- EU27 films represented 17% of all films on multi-country TVOD but 27% on SVOD services, showing an increased share of EU27 films compared to 19% in 2020.
- SVOD catalogues had a relatively high share of films of other regions with 21%, compared to TVOD's 11%. On average, SVOD services appear to be more diversified as to the origin of films in their catalogues than TVOD services.

**Origin of films in 103 multi-country TVOD catalogues**

- US: 348,723 (62%)
- EU27: 96,893 (17%)
- Other European: 58,691 (10%)
- Other international: 62,968 (11%)

**Origin of films in 381 multi-country SVOD catalogues**

- US: 127,294 (42%)
- EU27: 81,871 (27%)
- Other European: 29,673 (10%)
- Other international: 61,703 (21%)

Source: JustWatch, Filmto, Chili, La Pantalla Digital, EUROVOD catalogue data
The lower share of EU films in total compared to their share of unique films is explained by their lower circulation in countries, with an average of 2.7 countries on TVOD and 3.9 on SVOD.

US films and films from other regions and other European countries travelled best, crossing borders more easily than EU27 films.

<table>
<thead>
<tr>
<th>Region</th>
<th>TVOD Average</th>
<th>SVOD Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU 27</td>
<td>2.7</td>
<td>3.9</td>
</tr>
<tr>
<td>Other European</td>
<td>5.2</td>
<td>4.8</td>
</tr>
<tr>
<td>US</td>
<td>7.3</td>
<td>5.4</td>
</tr>
<tr>
<td>Other international</td>
<td>4.9</td>
<td>4.9</td>
</tr>
</tbody>
</table>

Source: JustWatch, Filmторо, Chili, La Pantalla Digital, EUROVOD catalogue data
And on services, EU27 titles tend to circulate less than titles of other regions.

On average, EU27 films were present in 6.3 TVOD catalogues and 4.7 SVOD catalogues, less than films of all other regions.

US films circulated best also on services, followed by other European films and films of other regions for all VOD services.

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

<table>
<thead>
<tr>
<th>Region</th>
<th>Average Circulation</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU 27</td>
<td>6.3</td>
</tr>
<tr>
<td>Other European</td>
<td>11</td>
</tr>
<tr>
<td>US</td>
<td>16.9</td>
</tr>
<tr>
<td>Other international</td>
<td>8.2</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Region</th>
<th>Average Circulation</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU 27</td>
<td>4.7</td>
</tr>
<tr>
<td>Other European</td>
<td>5.6</td>
</tr>
<tr>
<td>US</td>
<td>6.6</td>
</tr>
<tr>
<td>Other international</td>
<td>5.3</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Region</th>
<th>Average Circulation</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU 27</td>
<td>7.9</td>
</tr>
<tr>
<td>Other European</td>
<td>12.4</td>
</tr>
<tr>
<td>US</td>
<td>18.1</td>
</tr>
<tr>
<td>Other international</td>
<td>8.8</td>
</tr>
</tbody>
</table>

Source: JustWatch, Filmto, Chili, La Pantalla Digital, EUROVOD catalogue data
Services owned by tech had the highest number of films in their catalogues, followed by pure VOD players

- 70% of all films found on TVOD were on services owned by tech companies (Apple, Microsoft, Google, Amazon) and 31% of all films found on SVOD were on services owned by tech players (Amazon, Apple).
- 25% of all films were found on SVOD services owned by pure VOD players (Netflix, MUBI, Filmin, FilmoTV) and 7% on TVOD (FilmDoo, Chili, Flimmit).

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

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

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

- EU owned catalogues had on average a 37% share (TVOD) and a 43% share (SVOD) of EU27 films, while global services had a 16% share (TVOD) and a 23% share (SVOD) of EU27 films.
- With more than 3 times more films on TVOD and 3 times more films on SVOD, global players had a larger film offering than catalogues owned by EU players.
- Therefore, in absolute numbers, more EU27 films were available on services owned by global players than on EU27 players.
Services owned by tech players had the highest number of films in their catalogues. Tech and pure VOD players on SVOD such as Netflix had the highest number of films in their catalogues.

### TVOD – Number of films by core business of service owner

<table>
<thead>
<tr>
<th>Core business</th>
<th>Number of TVOD catalogues</th>
<th>Average number of films/catalogue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Film Institute</td>
<td>1</td>
<td>67</td>
</tr>
<tr>
<td>Private Equity</td>
<td>3</td>
<td>7 785</td>
</tr>
<tr>
<td>Pure VOD player</td>
<td>30</td>
<td>1 692</td>
</tr>
<tr>
<td>Rightsholder - Distributor/Producer</td>
<td>17</td>
<td>1 562</td>
</tr>
<tr>
<td>Tech</td>
<td>66</td>
<td>7 357</td>
</tr>
<tr>
<td>Telecom</td>
<td>12</td>
<td>5 439</td>
</tr>
<tr>
<td>TV</td>
<td>9</td>
<td>4 263</td>
</tr>
</tbody>
</table>

### SVOD – Number of films by core business of service owner

<table>
<thead>
<tr>
<th>Core business</th>
<th>Number of SVOD catalogues</th>
<th>Average number of films/catalogue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Film Institute</td>
<td>1</td>
<td>727</td>
</tr>
<tr>
<td>Private equity</td>
<td>2 553</td>
<td>511</td>
</tr>
<tr>
<td>Telecom</td>
<td>30</td>
<td>1 195</td>
</tr>
<tr>
<td>Rightsholder - Distributor/Producer</td>
<td>17</td>
<td>314</td>
</tr>
<tr>
<td>Tech</td>
<td>66</td>
<td>1 339</td>
</tr>
<tr>
<td>Pure VOD player</td>
<td>83 637</td>
<td>939</td>
</tr>
</tbody>
</table>

Source: JustWatch, Filmotor, Chili, La Pantalla Digital, EUROVOD catalogue data
Sharp differences in the composition of catalogues by core business of service owners

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

TVOD – Share of films by core business of service owner

SVOD – Share of films by core business of service owner

Source: JustWatch, Filmto, Chili, La Pantalla Digital, EUROVOD catalogue data
Higher share of EU27 films for EU27 owned services...

The share of EU27 films in the catalogues of EU27 owned services was higher, with 37% on TVOD and 43% on SVOD while global services had a share of EU27 films of 16% on TVOD and 23% on SVOD.

### TVOD – Share of films by origin of service owner

<table>
<thead>
<tr>
<th>Origin of service owner</th>
<th>TVOD Number of catalogues</th>
<th>Average number of films/catalogue</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU</td>
<td>63</td>
<td>2 589</td>
</tr>
<tr>
<td>Global services</td>
<td>75</td>
<td>7 024</td>
</tr>
</tbody>
</table>

### SVOD – Share of films by origin of service owner

<table>
<thead>
<tr>
<th>Origin of service owner</th>
<th>SVOD Number of catalogues</th>
<th>Average number of films/catalogue</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU</td>
<td>88</td>
<td>976</td>
</tr>
<tr>
<td>Global services</td>
<td>332</td>
<td>745</td>
</tr>
</tbody>
</table>

Source: JustWatch, Filmto, Chili, La Pantalla Digital, EUROVOD catalogue data
But the total offer of EU27 films was higher for global services

The average EU-owned SVOD service offered a higher number of films, a higher number of EU27 and other European films than global-owned SVOD services.

For TVOD, global-owned services offered significantly more films in their catalogues and also more EU27 and other European films than EU-owned services.

TVOD – Average number and origin of films by origin of service owner

<table>
<thead>
<tr>
<th>Service Owner</th>
<th>Average EU services</th>
<th>Average Global services</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU 27</td>
<td>2589</td>
<td>7024</td>
</tr>
<tr>
<td>Other European</td>
<td>1091</td>
<td>4355</td>
</tr>
<tr>
<td>US</td>
<td>250</td>
<td>731</td>
</tr>
<tr>
<td>Other international</td>
<td>968</td>
<td>1154</td>
</tr>
</tbody>
</table>

SVOD – Average number and origin of films by origin of service owner

<table>
<thead>
<tr>
<th>Service Owner</th>
<th>Average EU services</th>
<th>Average Global services</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU 27</td>
<td>976</td>
<td>2589</td>
</tr>
<tr>
<td>Other European</td>
<td>317</td>
<td>1091</td>
</tr>
<tr>
<td>US</td>
<td>420</td>
<td>250</td>
</tr>
<tr>
<td>Other international</td>
<td>160</td>
<td>968</td>
</tr>
</tbody>
</table>

Source: JustWatch, Filmto, Chili, La Pantalla Digital, EUROVOD catalogue data
On TVOD, 38% of all EU27 films were of national origin, 21% on SVOD

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

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

- With a share of 53% of national films of EU27 films on TVOD and 48% on SVOD, national services had a higher share of national film offering.
- For multi-country services, national films represented 31% of all EU27 films on TVOD and 17% on SVOD.
- This shows that national services, for TVOD and SVOD, tended to cater to national tastes in their film offering for EU27 film content while multi-country services relied heavily on EU non-national films to complement their EU27 film offering.
What was the split between national and EU27 non-national films?

- On TVOD, national films had a higher share than EU27 non-national films compared to SVOD.
- For both business models, EU27 non-national films represented the main source for EU27 films with 62% of all EU27 films on TVOD and 79% on SVOD.
- The offer of EU27 films is, on average, mainly composed of EU27 non-national films for both types of services.

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

- National: 56,564 (38%)
- EU27 non-national film: 90,989 (62%)

- Total EU films: 147,553

**SVOD - Split of national and EU27 non-national films**

- National: 20,310 (21%)
- EU27 non-national film: 74,361 (79%)

- Total EU films: 96,671

Source: JustWatch, Filmto, Chili, La Pantalla Digital, EUROVOD catalogue data
Differences between multi-country and national catalogues

On TVOD, **national services** had a higher share than **multi-country services** of national films in their EU27 film offering, thus catering to local tastes.

On the other hand, **multi-country services** offered more EU films and therefore also more national films.

**Multi-country** TVOD services relied mainly on EU non-national films for their EU27 film offering.

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

- **National** 29,757 (31%)
- **EU27 non-national film** 67,136 (69%)

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

- **National** 26,807 (53%)
- **EU27 non-national film** 23,853 (47%)

---

Source: JustWatch, Filmto, Chili, La Pantalla Digital, EUROVOD catalogue data
What is the split between national and EU27 non-national films?

On SVOD, national services relied also more on national films for their EU27 film offering with a 48% share of national films.

As on TVOD, multi-country services offered more EU films and thus also more national films.

EU27 non-national accounted for more than 80% of the EU27 film offering for multi-country services.

Source: JustWatch, Filmotoro, Chili, La Pantalla Digital, EUROVOD catalogue data
B.6 – Focus on the export of EU27 films in the EU27, on TVOD and SVOD

- Only EU27 non-national films were considered -

French films were the most exported films on TVOD and SVOD, making respectively up 28% and 25% of all exported EU27 films.

- German films ranked second with 22% of all exported films on TVOD and 17% on SVOD.
- Italian films were the third most exported EU27 films on TVOD and SVOD.
- While on TVOD Spanish films ranked fourth with 7%, on SVOD Swedish films were more represented than Spanish films with 8% and took the fourth rank, followed by Spanish films with 7%.
- EU-4 (France, Germany, Italy and Spain) films represented 57% of all EU27 film exports on TVOD and 69% on SVOD.
- Spanish film titles circulated best among these EU-4 titles with an average of 4 export countries on TVOD and 5.6 on SVOD.

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

- With 25% and 30% of all exported EU27 films in multi-country TVOD and SVOD catalogues, French films were the first source of imported films.
- They were also the first source of EU27 non-national films on national SVOD services, with 29% and took 2nd place on TVOD with 22%, behind German films with 26%.

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

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

For other European films, British films made up the bulk of films with 81% on TVOD and 70% on SVOD.
Which EU27 countries exported the most films on TVOD?

French films dominated the export of EU27 films on TVOD services with 28% followed by the other 3 biggest film producing countries in EU27: Germany, Italy and Spain.

Nordic countries, Dutch, Austrian, Belgian and Irish films completed the top 10 export countries for EU27 films while the remaining 14 EU27 countries exported 5% of all EU27 films.
National and multi-country TVOD services had similar share of EU27 non-national films by country of origin

For EU27 films, the percentages of exports were comparable for national and multi-country catalogues. French, German, Spanish and Italian films represented 66% of all EU27 films exports for multi-country services and 69% for national services.

Source: JustWatch, Film Toro, Chili, La Pantalla Digital, EUROVOD catalogue data
British films dominated the export of other European films on TVOD services with 81% of all EUR OBS films available on TVOD services.

Films from Russia, Norway, Turkey, Switzerland and Island accounted for 17%.

The other 1% of films from other European countries were provided by Georgia, Bosnia and Herzegovina, Albania, Armenia, Macedonia and Liechtenstein.

Source: JustWatch, Filmto, Chili, La Pantalla Digital, EUROVOD catalogue data
And how many unique film titles were exported and present on average in countries?

Countries with a lower number of film exports had a better country circulation – a low number of titles enhanced circulation.

Spanish titles circulated best out of EU-4 when they were exported, followed by French, Italian and German titles.

Titles from smaller film producing countries, like Bulgaria, Estonia or Luxembourg, also had a high country circulation for a smaller number of titles.

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

Read the matrix as: 3 502 French titles were exported with an average country presence in 3.4 countries.

Source: JustWatch, Filmtoro, Chili, La Pantalla Digital, EUROVOD catalogue data
6 French, 5 Spanish and 3 Italian titles were among the most exported films on TVOD services in 2021. The top list is completed by 2 Irish titles, 1 German, 1 Bulgarian, 1 Belgian and 1 Danish title. 14 titles were co-productions of which 9 with the United States and 8 between at least 2 EU27 countries.

The median production year was 2015.5; 3 titles were less than 2 year old; 10 titles were produced in the past 5 years in 2021; 10 titles were produced before 2016 (catalogue films).

### Top 20 EU27 exported film titles in 138 TVOD catalogues

<table>
<thead>
<tr>
<th>Original title</th>
<th>Production year</th>
<th>Production countries</th>
<th>Export EU services</th>
<th>Export EU countries</th>
</tr>
</thead>
<tbody>
<tr>
<td>Call Me by Your Name</td>
<td>2017</td>
<td>IT,FR,BR,US</td>
<td>75</td>
<td>18</td>
</tr>
<tr>
<td>Lucy</td>
<td>2014</td>
<td>FR</td>
<td>74</td>
<td>18</td>
</tr>
<tr>
<td>C'era una volta il West</td>
<td>1969</td>
<td>IT,US</td>
<td>74</td>
<td>18</td>
</tr>
<tr>
<td>In the Name of the Father</td>
<td>1993</td>
<td>IE,GB,US</td>
<td>71</td>
<td>18</td>
</tr>
<tr>
<td>Hitman</td>
<td>2007</td>
<td>FR,US</td>
<td>70</td>
<td>18</td>
</tr>
<tr>
<td>Tadeo Jones 2: El secreto del Rey Midas</td>
<td>2017</td>
<td>ES</td>
<td>68</td>
<td>18</td>
</tr>
<tr>
<td>Cold Blood Legacy</td>
<td>2019</td>
<td>FR,UA,BE</td>
<td>65</td>
<td>18</td>
</tr>
<tr>
<td>Transporter 2</td>
<td>2005</td>
<td>FR</td>
<td>64</td>
<td>17</td>
</tr>
<tr>
<td>55 Steps</td>
<td>2017</td>
<td>DE,BE</td>
<td>63</td>
<td>18</td>
</tr>
<tr>
<td>Conor McGregor: Notorious</td>
<td>2017</td>
<td>IE</td>
<td>61</td>
<td>17</td>
</tr>
<tr>
<td>Taken 3</td>
<td>2014</td>
<td>FR</td>
<td>61</td>
<td>13</td>
</tr>
<tr>
<td>Dolor y gloria</td>
<td>2019</td>
<td>ES,FR</td>
<td>61</td>
<td>12</td>
</tr>
<tr>
<td>Under sandet</td>
<td>2015</td>
<td>DK,DE</td>
<td>60</td>
<td>18</td>
</tr>
<tr>
<td>Backdraft 2</td>
<td>2019</td>
<td>BE,US</td>
<td>60</td>
<td>17</td>
</tr>
<tr>
<td>Transporter</td>
<td>2002</td>
<td>FR,US</td>
<td>59</td>
<td>17</td>
</tr>
<tr>
<td>Extinction</td>
<td>2015</td>
<td>ES,US,HU,FR</td>
<td>58</td>
<td>18</td>
</tr>
<tr>
<td>Remember Me</td>
<td>2019</td>
<td>ES,US,FR</td>
<td>58</td>
<td>17</td>
</tr>
<tr>
<td>Gernika</td>
<td>2016</td>
<td>ES,US</td>
<td>58</td>
<td>17</td>
</tr>
<tr>
<td>The Leisure Seeker</td>
<td>2017</td>
<td>IT,FR</td>
<td>57</td>
<td>18</td>
</tr>
<tr>
<td>Sniper: Legacy</td>
<td>2014</td>
<td>BG</td>
<td>57</td>
<td>16</td>
</tr>
</tbody>
</table>

Source: JustWatch, Filmtoro, Chili, La Pantalla Digital, EUROVOD catalogue data
Which EU countries exported the most on SVOD?

As it was the case for TVOD, France was also the top film exporter on SVOD with 25% of all EU27 film exports while EU-4 made up 59% of all exported EU27 films.

The proportion of the bottom 14 export countries was also comparable, at 7% of all EU27 film exports.

Swedish films arrived in 4th position, showing the increased reliance on Nordic content by streaming services.

<table>
<thead>
<tr>
<th>Country</th>
<th>SVOD Exports</th>
<th>Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>FR</td>
<td>18 581</td>
<td>25%</td>
</tr>
<tr>
<td>DE</td>
<td>12 515</td>
<td>17%</td>
</tr>
<tr>
<td>IT</td>
<td>7 326</td>
<td>10%</td>
</tr>
<tr>
<td>SE</td>
<td>5 830</td>
<td>8%</td>
</tr>
<tr>
<td>ES</td>
<td>5 431</td>
<td>7%</td>
</tr>
<tr>
<td>NL</td>
<td>2 134</td>
<td>3%</td>
</tr>
<tr>
<td>PL</td>
<td>1 501</td>
<td>2%</td>
</tr>
<tr>
<td>RO</td>
<td>1 469</td>
<td>2%</td>
</tr>
<tr>
<td>PT</td>
<td>1 443</td>
<td>2%</td>
</tr>
<tr>
<td>DK</td>
<td>3 319</td>
<td>4%</td>
</tr>
<tr>
<td>CZ</td>
<td>3 651</td>
<td>5%</td>
</tr>
<tr>
<td>BE</td>
<td>2 170</td>
<td>3%</td>
</tr>
<tr>
<td>HR</td>
<td>477</td>
<td>1%</td>
</tr>
<tr>
<td>BG</td>
<td>383</td>
<td>1%</td>
</tr>
<tr>
<td>EE</td>
<td>248</td>
<td>0%</td>
</tr>
<tr>
<td>GR</td>
<td>225</td>
<td>0%</td>
</tr>
<tr>
<td>LT</td>
<td>216</td>
<td>0%</td>
</tr>
<tr>
<td>SI</td>
<td>135</td>
<td>0%</td>
</tr>
<tr>
<td>LU</td>
<td>94</td>
<td>0%</td>
</tr>
<tr>
<td>MT</td>
<td>24</td>
<td>0%</td>
</tr>
<tr>
<td>CY</td>
<td>13</td>
<td>0%</td>
</tr>
<tr>
<td>Other 14 EU27 countries</td>
<td>5 466</td>
<td>7%</td>
</tr>
</tbody>
</table>

Source: JustWatch, Filmotor, Chili, La Pantalla Digital, EUROVOD catalogue data
Comparable proportions of films on SVOD and on TVOD for multi-country and national services

For multi-country catalogues, French, German, Italian and Swedish films represented 60% of all exported EU27 films.

For national catalogues, due to the high number of German SVOD catalogues, Austrian films were surprisingly ranking fourth for exports with 6%.

### Export of EU films in 381 multi-country SVOD catalogues

- **FR**: 16,643 (25%)
- **DE**: 11,184 (17%)
- **IT**: 6,742 (10%)
- **SE**: 5,527 (8%)
- **ES**: 5,028 (7%)
- **AT**: 3,122 (5%)
- **CZ**: 3,551 (5%)
- **RO**: 1,400 (2%)
- **BE**: 1,858 (3%)
- **NL**: 1,958 (3%)
- **PT**: 1,378 (2%)
- **PL**: 1,390 (2%)
- **DK**: 3,045 (4%)
- **Other 14 EU27 countries**: 4,915 (7%)

### Export of EU films in 39 national SVOD catalogues

- **FR**: 1,938 (29%)
- **DE**: 1,331 (20%)
- **IT**: 584 (9%)
- **SE**: 303 (5%)
- **BE**: 312 (5%)
- **ES**: 403 (6%)
- **AT**: 403 (6%)
- **NL**: 176 (3%)
- **IE**: 164 (2%)
- **RO**: 1,400 (2%)
- **PL**: 1,390 (2%)
- **CZ**: 100 (2%)
- **FI**: 99 (1%)
- **Other 14 EU27 countries**: 422 (6%)

Source: JustWatch, Filmto, Chili, La Pantalla Digital, EUROVOD catalogue data
Which other European countries exported the most on SVOD?

- British films made up the lion share of other European films with 70% on SVOD.
- Films from Turkey, Russia, Switzerland, Norway and Island made up 29% of other European films on SVOD.
- 7 other European countries represented 2% of all other European films on SVOD.

**SVOD – Number of Other European films by country of origin**

- GB: 22,867 (70%)
- CH: 2,425 (7%)
- TR: 2,356 (7%)
- RU: 2,197 (7%)
- NO: 2,067 (6%)
- IS: 406 (1%)
- Other 7 European countries (GE, BA, ML, AM, AL, LI, ME): 592 (2%)

Source: JustWatch, Filmotoro, Chili, La Pantalla Digital, EUROVOD catalogue data
And how many unique film titles are exported and present on average in countries?

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

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

Read the matrix as: 3,228 French titles were exported with an average country presence in 4.8 countries.

Source: JustWatch, Filmotor, Chili, La Pantalla Digital, EUROVOD catalogue data
Top 20 EU27 film titles exported on SVOD services

French titles represented 5 titles in the top 20 list, followed by 4 Italian titles, 3 Croatian, respectively 2 Portuguese and Czech titles and 4 titles from Belgium, Denmark, Romania and Ireland.

9 titles were co-productions of which 3 with the United Kingdom, 2 with the United States and 3 between at least 2 EU27 countries.

The median production year was 2014.5 and 4 titles were produced in or after 2018 - 8 titles were produced in the past 5 years and 12 titles were produced before 2016 (catalogue films).

The presence of many documentaries is explained by the addition of several multi-country SVOD services focused on documentaries.

<table>
<thead>
<tr>
<th>Original title</th>
<th>Production year</th>
<th>Production countries</th>
<th>Export EU services</th>
<th>Export EU countries</th>
</tr>
</thead>
<tbody>
<tr>
<td>Moj život bez zraka</td>
<td>2017</td>
<td>HR</td>
<td>55</td>
<td>19</td>
</tr>
<tr>
<td>Dal profondo</td>
<td>2013</td>
<td>IT</td>
<td>50</td>
<td>18</td>
</tr>
<tr>
<td>Between Sisters</td>
<td>2015</td>
<td>BE,IT</td>
<td>49</td>
<td>18</td>
</tr>
<tr>
<td>Uma Rapariga da sua Idade</td>
<td>2015</td>
<td>PT</td>
<td>48</td>
<td>18</td>
</tr>
<tr>
<td>As Cidades e as Trocas</td>
<td>2014</td>
<td>PT</td>
<td>48</td>
<td>18</td>
</tr>
<tr>
<td>La Arrancada</td>
<td>2019</td>
<td>FR</td>
<td>48</td>
<td>18</td>
</tr>
<tr>
<td>I Am Breathing</td>
<td>2013</td>
<td>DK,GB</td>
<td>48</td>
<td>18</td>
</tr>
<tr>
<td>Il treno va a Mosca</td>
<td>2013</td>
<td>IT,GB</td>
<td>47</td>
<td>18</td>
</tr>
<tr>
<td>Lucy</td>
<td>2014</td>
<td>FR</td>
<td>46</td>
<td>25</td>
</tr>
<tr>
<td>Dancing with Maria</td>
<td>2014</td>
<td>IT,SI,SL</td>
<td>45</td>
<td>18</td>
</tr>
<tr>
<td>The Family</td>
<td>2013</td>
<td>FR,US</td>
<td>41</td>
<td>19</td>
</tr>
<tr>
<td>Once Upon a Time in America</td>
<td>1984</td>
<td>IT,US</td>
<td>40</td>
<td>23</td>
</tr>
<tr>
<td>La Pointe Courte</td>
<td>1955</td>
<td>FR</td>
<td>39</td>
<td>18</td>
</tr>
<tr>
<td>Zid smrti, i tako to</td>
<td>2016</td>
<td>HR,RS</td>
<td>38</td>
<td>19</td>
</tr>
<tr>
<td>Srbenka</td>
<td>2018</td>
<td>HR</td>
<td>37</td>
<td>19</td>
</tr>
<tr>
<td>Marele jaf communist</td>
<td>2004</td>
<td>RO,FR,DE,GB</td>
<td>37</td>
<td>19</td>
</tr>
<tr>
<td>Tinselwood</td>
<td>2017</td>
<td>FR</td>
<td>36</td>
<td>18</td>
</tr>
<tr>
<td>Central Bus Station</td>
<td>2018</td>
<td>CZ</td>
<td>36</td>
<td>18</td>
</tr>
<tr>
<td>On Thin Ice</td>
<td>2019</td>
<td>CZ,MA</td>
<td>36</td>
<td>18</td>
</tr>
<tr>
<td>Lift</td>
<td>2016</td>
<td>IE</td>
<td>36</td>
<td>18</td>
</tr>
</tbody>
</table>

Source: JustWatch, Filmotor, Chili, La Pantalla Digital, EUROVOD catalogue data
TV content in VOD catalogues in the EU27

Overview of
49 TVOD catalogues
and
307 SVOD catalogues
C.1 – Size of TV content catalogues

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

**TVOD catalogues were bigger than SVOD catalogues in average and in median number of seasons**
- Catalogues’ size in median number of TV seasons on TVOD more than doubled SVOD catalogues.
- SVOD catalogues were smaller than TVOD in average and median number of seasons, because many smaller SVOD services have been added to the analysis (307 catalogues tracked in 2021).

**National TVOD services were the biggest VOD catalogues in average number of seasons**
- National services have refurbished their catalogues with TV content in the past year.
- For SVOD services, there was a bigger average number of seasons on multi-country catalogues.

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

**The bulk of TV series’ first seasons available on SVOD were less than 5 years old**
- On SVOD, half of all TV series’ first seasons available (51%) were produced in 2017 or later and 80% were less than 10 years old in 2021.
- TV content was older on TVOD, with half of all first seasons available (49%) being produced in 2014 or later and 61% being less than 10 years old in 2021.
On average, TVOD catalogues had 35% more TV seasons than SVOD catalogues.

The median TVOD catalogue in 2021 was 125% bigger than the median SVOD catalogue, because many new smaller SVOD catalogues have been added to the sample.

21 SVOD catalogues counted 2,000 or more seasons, while only 6 TVOD services reached 2,000.

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

<table>
<thead>
<tr>
<th></th>
<th>Average number of TV seasons</th>
<th>Median number of TV seasons</th>
</tr>
</thead>
<tbody>
<tr>
<td>TVOD catalogues</td>
<td>522</td>
<td>281</td>
</tr>
<tr>
<td>SVOD catalogues</td>
<td>707</td>
<td>125</td>
</tr>
</tbody>
</table>

Source: JustWatch data
Also, strong differences between national and multi-country services

- National catalogues showed similar average number of seasons than multi-country services, which compared to 2020, shows a huge growth of national catalogues’ average volumes.
- A large number of new, small multi-country SVOD services explains the lower median number of TV seasons in multi-country services compared to the national SVOD catalogues’ median.

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

<table>
<thead>
<tr>
<th></th>
<th>Average number of TV seasons</th>
<th>Median number of TV seasons</th>
</tr>
</thead>
<tbody>
<tr>
<td>Multi-country</td>
<td>674</td>
<td>251</td>
</tr>
<tr>
<td>National</td>
<td>781</td>
<td>371</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th></th>
<th>Average number of TV seasons</th>
<th>Median number of TV seasons</th>
</tr>
</thead>
<tbody>
<tr>
<td>Multi-country</td>
<td>526</td>
<td>108</td>
</tr>
<tr>
<td>National</td>
<td>480</td>
<td>322</td>
</tr>
</tbody>
</table>

*Source: JustWatch data*
Huge disparities in absolute numbers of TV seasons for TVOD and SVOD catalogues

- Multi-country services (both TVOD and SVOD) had a much higher amount of TV seasons than national services, which seemed to be a matter of scale.
- 82% of TVOD catalogues and 88% of SVOD catalogues offered less than 1 000 TV seasons.
- SVOD services seemed to be more focused on TV content and TVOD services, on films.

Source: JustWatch data
Extreme disparities in the size of VOD catalogues

Average and median values do not reflect the enormous disparities in the numbers of TV seasons in each VOD catalogue. For TVOD, catalogue sizes vary from 5,609 to 14 TV seasons – just 9 catalogues from the 49 have more than 1,000 TV seasons but 35 catalogues have less than 500 TV seasons.

For SVOD, sizes vary from 7,637 to 15 titles – 38 catalogues have more than 1,000 TV seasons while 144 have less than 100.

Size of 49 TVOD film catalogues, in number of films

Size of 307 SVOD film catalogues, in number of films

Source: JustWatch, Filmtoro, Chili, La Pantalla Digital, EUROVOD catalogue data
The bulk of TV series first seasons available on SVOD were less than 5 years old

- Half of all TV series first seasons available on SVOD (51%) were produced in 2017 or later and 80% were less than 10 years old in 2021.
- TV series first seasons on TVOD were older, with half of all first seasons available on TVOD (49%) being produced in 2014 or later and 61% being less than 10 years old in 2021.

Source: JustWatch data
C.2 – Unique TV contents available in VOD catalogues

TV content in this section was analysed in number of unique TV seasons (each season is counted once).

**Over 28 000 unique TV seasons were available in VOD catalogues, 28% from EU27**

- Of all 28 762 unique seasons, 28% were of EU27 origin and 34% of US origin.
- The bulk (83%) of EU27 TV seasons were German (31%), French, Dutch, Spanish, Danish and Italian.
- Other European seasons, with the integration of British content, represented 18% of all available.

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

- With over 12 000 unique TV seasons available, SVOD services offered more unique TV seasons than TVOD.
- On TVOD services, EU27 content represented one third of TV seasons (33%).
- Other European seasons, including British content, reached 19% on SVOD and 16% on TVOD.
- On SVOD services, other international seasons represented twice as much as on TVOD.

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

- On TVOD, German seasons represented almost half of total, and German TV seasons also came first on SVOD.
- Germany, France and Spain alone provided the bulk (81%) of EU27 content on TVOD.
- DE, FR, NL, DK, ES and IT provided the majority of TV seasons on SVOD (82%).

**Dominance of British content in Other European TV seasons**

- GB content represented for both business models 93% of all Other European TV seasons available.
- The shift of British TV content from EU28 to Other European, had a significant impact on the share of EU TV seasons for both types of services.
Over 28 000 unique TV seasons available in VOD catalogues, 28% from EU27

- **28 762 unique TV seasons** were available to customers on both types of VOD services.
- **28%** of all unique seasons were of **EU27 origin** and **34%** of US origin.
- Dutch content came third in volume, before Spanish and Italian seasons.
- **Other European seasons**, with the integration of British content, represented **18%** of all available.

**Unique TV seasons in VOD catalogues, by region of origin**

- US: 9 887 (34%)
- EU27: 7 912 (28%)
- Other int'l.: 5 707 (20%)

**Unique EU27 seasons in VOD catalogues, by country of origin**

- DE: 2 426 (31%)
- FR: 1 327 (17%)
- NL: 960 (12%)
- ES: 865 (11%)
- SE: 74 (3%)
- IT: 399 (5%)
- DK: 553 (7%)
- IE: 86 (1%)
- CZ: 65 (1%)
- 12 other countries: 175 (2%)

Source: JustWatch data
With over 26,000 seasons available, SVOD services offer the highest number of unique TV seasons.

On TVOD services, EU27 content represented one third of TV seasons (33%).

On SVOD services, other international seasons represented one fifth of total seasons.

Other European seasons, with the integration of British content, made 19% on SVOD and 16% on TVOD.

Unique TV seasons in TVOD catalogues, by region of origin

- EU27: 3,438 (33%)
- Other European: 1,601 (16%)
- US: 4,279 (41%)
- Other Intl.: 988 (10%)

Unique TV seasons in SVOD catalogues, by region of origin

- EU27: 6,813 (26%)
- Other European: 4,990 (19%)
- US: 9,461 (35%)
- Other Intl.: 988 (10%)

Source: JustWatch data
On TVOD, German seasons represented almost half of total, due to numerous seasons per TV title.*

On SVOD, German TV seasons come first, and there are more Dutch than Spanish or Italian seasons.

Germany, France and Spain alone provide the bulk (81%) of EU27 content on TVOD.

DE, FR, NL, DK, and ES provide the majority (76%) of TV seasons on SVOD.

(*) Also partly due to the weight of German and Austrian services in the sample.
The dominance of British content in ‘other European’ TV seasons

- GB content represented 93% of all ‘other European’ TV seasons available on TVOD and on SVOD.
- Turkish, Norwegian, Swiss and Russian titles completed the top 5 of ‘other European’ content.
- The shift of British TV content from EU28 to ‘other European’ had a significant impact on the share of EU27 TV seasons for both types of services.

### Origin of other European TV seasons in TVOD catalogues
- GB, 1493, 93%
- TR, 30, 2%
- NO, 36, 2%
- RU, 12, 1%
- IS, 11, 1%
- CH, 19, 1%

### Origin of other European TV seasons in SVOD catalogues
- GB, 4652, 93%
- TR, 163, 3%
- NO, 36, 2%
- RU, 64, 1%
- CH, 27, 1%
- IS, 13, 0%
- AL, 1, 0%

Source: JustWatch data
C.3 – Origin and circulation of cumulated TV content

TV content was analysed here in cumulated number of seasons (each season is counted in each catalogue where available).

ORIGIN

US TV seasons represented half of all cumulated TV content on VOD
- 15% of all cumulated TV seasons on VOD were from EU27, from which 5.5% were German and 3% French.

24% of cumulated TV seasons on TVOD are of EU27 origin, but only 13% on SVOD
- On SVOD services, EU27 content decreased from 26% unique seasons to 13% cumulated seasons.
- US TV seasons, over half of all cumulated content in VOD, multiplied their unique presence.
- Almost as much TV content from other international origins (25%) than European* (26%) on SVOD catalogues.

The difference between the share of EU27 or European* TV seasons was significant on VOD
- If other European countries (incl. UK) are considered, the European* share is 37% for TVOD and 26% for SVOD.

National VOD services presented the highest shares of EU27 TV seasons
- National TVOD services complemented their offering with US and other European content, while national SVOD catalogues relied more on US and other international content.

Multi-country VOD services relied more heavily on US seasons, but offered more European content in absolute numbers
- EU27 TV seasons represented 17% on multi-country TVOD services and just 11% on SVOD services.

(*) EU27 and Other European origins together.
C.3 – Origin and circulation of cumulated TV content

TV content was analysed here in **cumulated number of seasons** (each season is counted in each catalogue where available).

**CIRCULATION**

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

- 33% of EU27 unique TV seasons represented only 24% of all cumulated content on TVOD, while on SVOD, 26% of EU27 unique TV content represented just 13% of cumulated. This is explained by the lower circulation of EU27 content than content of other origins, with an average of 2.7 countries on SVOD and 1.5 on TVOD.
- US and other regions TV seasons travelled best, crossing borders more easily than European content.

And in number of catalogues, **EU27 TV content circulated slightly better on SVOD**

- On average, EU27 TV seasons were present in 3.2 different SVOD catalogues and in 2.5 TVOD catalogues.
- On SVOD, other international TV seasons circulated on an average 7.4 catalogues.
- US TV content circulated the best also in average number of catalogues, more importantly on SVOD (with 8.3 services).
Almost 200 000 cumulated TV seasons available in VOD catalogues, 15% from EU27

194 862 cumulated TV seasons were available to EU customers on 356 catalogues (TVOD and SVOD).
15% of all unique seasons were of EU27 origin compared to 50% of US origin.
EU4: German (36%), French, Spanish and Italian seasons represented 69% of cumulated EU27 seasons, decreasing 8% from 2020 offer. Scandinavian and Dutch TV content growing in volume.

Origin of cumulated TV seasons in 356 VOD catalogues

Cumulated EU27 seasons in 356 VOD catalogues, by country of origin

Source: JustWatch data
24% of cumulated TV seasons on TVOD were of EU27 origin, 13% on SVOD

On SVOD services, 26% unique EU27 seasons represented only 13% of cumulated seasons. On TVOD, 33% of unique EU27 TV seasons represented just 24% of total cumulated contents.

US TV seasons represented 3 out of 5 of all cumulated content on TVOD (57%) and half on SVOD (49%).

On SVOD, same volume of European* TV seasons (26%) than from other international origin (25%), 85% of which originating from Japan (52%), Canada, South Korea, India and Australia.

Source: JustWatch data
Origin of cumulated EU27 content by business model: German dominance on TVOD

German share of cumulated content on TVOD represented more than half of total on TVOD.* On SVOD, the offer is more equilibrated; Dutch and Scandinavian TV seasons represent 20% of the offer. DE, FR, ES, NL, DK and IT provide the majority (79%) of TV seasons available on SVOD.

(*) Partly due to the weight of German and Austrian services in the sample.
National VOD services presented the highest shares of EU27 TV seasons... 

- Half of available TV content on national VOD catalogues was European.* 
- National VOD services relied on EU27 TV seasons to cater for their national audiences. 
- SVOD and TVOD national services showed a similar acquisition strategy.

**Origin of TV seasons in 15 national TVOD catalogues**

- **11,714 TV seasons**
  - US: 4,939 (42%)
  - EU27: 4,428 (38%)
  - Other European: 1,401 (12%)
  - Other intl.: 946 (8%)

**Origin of TV seasons in 30 national SVOD catalogues**

- **14,412 TV seasons**
  - US: 6,201 (43%)
  - EU27: 5,137 (36%)
  - Other European: 1,860 (13%)
  - Other intl.: 1,214 (8%)

(*) EU27 and Other European origins together.
... while multi-country VOD services relied more heavily on US TV seasons.

- EU27 TV seasons represented 17% on multi-country TVOD services and just 11% on SVOD services.
- Multi-country TVOD services relied more heavily on US TV seasons (65%), but SVOD offered more volume.
- Multi-country SVOD services provided 75% of the total TV content offer on VOD in June 2021.
- Share of other international TV seasons (27%) on SVOD was bigger than European* TV offer.

### Origin of TV seasons in 34 multi-country TVOD catalogues
- **US**: 14,806 (65%)
- **EU27**: 4,025 (17%)
- **Other**: 1,144 (5%)
- **Other European**: 2,946 (13%)
- **22,921 cumulated TV seasons**

### Origin of TV seasons in 277 multi-country SVOD catalogues
- **US**: 71,994 (49%)
- **EU27**: 16,519 (11%)
- **Other**: 39,011 (27%)
- **Other European**: 18,291 (13%)
- **145,815 TV seasons**

(*) EU27 and Other European origins together.

Source: JustWatch data
EU27 TV seasons circulated in a smaller number of countries than other origins

33% of EU27 unique TV seasons on TVOD represented only 24% of all cumulated content, and 26% of EU27 unique TV content on SVOD represented just 13% of cumulated. This is explained by the lower circulation in countries of EU27 content, with an average of 1.5 countries on TVOD and 2.7 on SVOD.

US and other international TV seasons crossed borders more easily than European* content.

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

<table>
<thead>
<tr>
<th>Region</th>
<th>EU 27</th>
<th>Other European</th>
<th>US</th>
<th>Other international</th>
</tr>
</thead>
<tbody>
<tr>
<td>average</td>
<td>1.5</td>
<td>1.9</td>
<td>2.6</td>
<td>1.5</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Region</th>
<th>EU 27</th>
<th>Other European</th>
<th>US</th>
<th>Other international</th>
</tr>
</thead>
<tbody>
<tr>
<td>average</td>
<td>2.7</td>
<td>3.4</td>
<td>6.9</td>
<td>6.9</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Region</th>
<th>EU 27</th>
<th>Other European</th>
<th>US</th>
<th>Other international</th>
</tr>
</thead>
<tbody>
<tr>
<td>average</td>
<td>2.5</td>
<td>3.5</td>
<td>6.9</td>
<td>6.7</td>
</tr>
</tbody>
</table>

(*) EU27 and Other European origins together.

Source: JustWatch data
On average, EU27 TV seasons were present in 2.5 different TVOD catalogues and in 3.2 SVOD catalogues.

On SVOD, other international TV seasons were found on average in 7.4 catalogues.

US TV content circulated better than any other origin in average number of catalogues.

<table>
<thead>
<tr>
<th>Region of Origin</th>
<th>TVOD Circulation</th>
<th>SVOD Circulation</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU 27</td>
<td>2.5</td>
<td>3.2</td>
</tr>
<tr>
<td>Other European</td>
<td>2.7</td>
<td>4.1</td>
</tr>
<tr>
<td>US</td>
<td>4.6</td>
<td>8.3</td>
</tr>
<tr>
<td>Other international</td>
<td>2.1</td>
<td>7.4</td>
</tr>
</tbody>
</table>

Source: JustWatch data
C.4 – Focus on services’ core business and ownership

Half of all TV content was available on tech players for TVOD and on pure VOD players for SVOD. Tech players (Amazon, Google, iTunes, Microsoft) provided 54% of all cumulated TV content on TVOD. 50% of content on SVOD was found on pure VOD players (Netflix, Crunchyroll, Hayu).

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

- Services owned by rightsholders (distributors/producers), TV players (Maxdome, Canal VOD) or Telecom (Orange, Sky) showed the highest shares of EU27 TV seasons on TVOD.
- Private equity (Go3), TV (Viaplay, Disney+) and tech players showed the largest EU27 TV content on SVOD.
- For SVOD, pure VOD players (Netflix) built their catalogues on US and Other international TV seasons.
- The highest share of US seasons was found in TVOD services operated by private equity and tech players (Amazon), and on SVOD on Telecom (Sky) and TV, all of them offering 64% to 70% of US content.

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

- The share of EU27 TV seasons in the catalogues of EU owned services was higher, with 35% on TVOD and 33% on SVOD while global services had an EU27 TV seasons’ share of 18% on TVOD and 11% on SVOD.
- SVOD global services showed a higher share of other international content (28%) than European content.

...but the total offer of EU27 TV seasons was higher on SVOD global services

- In absolute numbers, SVOD global services offered more TV seasons and thus also more EU27 TV seasons than EU27 owned SVOD services (2.5 times more).
- Global SVOD services offered 7.7 times more content than global TVOD services.
Half of all TV content was available on tech services for TVOD and on pure VOD players for SVOD.

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

<table>
<thead>
<tr>
<th>Core business</th>
<th>Number of TVOD catalogues</th>
<th>Average number of seasons/catalogue</th>
<th>Number of SVOD catalogues</th>
<th>Average number of seasons/catalogue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Private Equity</td>
<td>3</td>
<td>353</td>
<td>5</td>
<td>64</td>
</tr>
<tr>
<td>Pure VOD player</td>
<td>7</td>
<td>304</td>
<td>50</td>
<td>1,302</td>
</tr>
<tr>
<td>Rightsholder - Distributor/Producer</td>
<td>3</td>
<td>168</td>
<td>119</td>
<td>62</td>
</tr>
<tr>
<td>Tech</td>
<td>21</td>
<td>891</td>
<td>50</td>
<td>650</td>
</tr>
<tr>
<td>Telecom</td>
<td>8</td>
<td>693</td>
<td>33</td>
<td>792</td>
</tr>
<tr>
<td>TV</td>
<td>7</td>
<td>955</td>
<td>50</td>
<td>575</td>
</tr>
</tbody>
</table>

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

- **Private equity**: 224
- **Distributor**: 579
- **Tech**: 18,715 (54%)
- **Telecom**: 5,545 (16%)
- **TV**: 6,682 (19%)
- **Pure VOD player**: 2,129 (6%)
- **Rightsholder - Distributor/Producer**: 505 (2%)

Source: JustWatch data
Sharp differences in the composition of catalogues by core business of service owners

- On TVOD services owned by distributors, TVs and telecom had the highest share of EU27 TV seasons, while on SVOD, private equity players, TVs and tech services had the largest EU27 TV content.
- For SVOD, pure VOD players built their catalogues on US and Other international TV seasons.
- The highest share of US seasons was found on SVOD services operated by telecom and TV players, and on TVOD services operated by private equity services and tech players.

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

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

Source: JustWatch data
Higher shares of EU27 TV content on EU-owned services...

The share of EU27 TV seasons in the catalogues of EU-owned services was higher than on global services which showed 18% EU27 seasons on TVOD and just 11% on SVOD (but growing from 8% in 2020).

SVOD global services showed the lowest share of EU27 TV seasons and offered more content from other international origins (28%) than European* (23%) TV seasons.

### TVOD – Share of TV seasons by origin of service owner

<table>
<thead>
<tr>
<th>Origin of service owner</th>
<th>Number of TVOD catalogues</th>
<th>Average number of seasons/catalogue</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU</td>
<td>24</td>
<td>570</td>
</tr>
<tr>
<td>Global services</td>
<td>25</td>
<td>838</td>
</tr>
</tbody>
</table>

### SVOD – Share of TV seasons by origin of service owner

<table>
<thead>
<tr>
<th>Origin of service owner</th>
<th>Number of SVOD catalogues</th>
<th>Average number of seasons/catalogue</th>
</tr>
</thead>
<tbody>
<tr>
<td>EU</td>
<td>38</td>
<td>509</td>
</tr>
<tr>
<td>Global services</td>
<td>269</td>
<td>524</td>
</tr>
</tbody>
</table>

(*) EU27 and Other European origins together.
...but the average offer differed: on EU-owned SVOD and on global TVOD services

- Global-owned TVOD services offered on average more TV content in their catalogues and also more European (EU27 and other European) TV seasons than EU-owned services.
- EU-owned SVOD services offered a higher average number of EU27 and other European TV seasons than global-owned SVOD services.

**TVOD – Average number of TV seasons by origin of service owner**

- **Average EU services**: 570 seasons
  - EU 27: 52
  - Other European: 263
  - US: 65
  - Other international: 197
- **Average Global services**: 838 seasons
  - EU 27: 83
  - Other European: 559
  - US: 140
  - Other international: 178

**SVOD – Average number of TV seasons by origin of service owner**

- **Average EU services**: 509 seasons
  - EU 27: 36
  - Other European: 256
  - US: 73
  - Other international: 171
- **Average Global services**: 524 seasons
  - EU 27: 158
  - Other European: 285
  - US: 73
  - Other international: 78

Source: JustWatch data
TV content on this section was analysed in **cumulated number of seasons**.

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

- Three out of every five TV seasons (60%) on TVOD catalogues were national content.
- On the contrary, EU27 non-national TV seasons represented two thirds (67%) of total offer on SVOD. For some global services (Netflix, Amazon) the worldwide rights acquisition of content made European content available on all their European catalogues.

**National TV seasons offering was important on multi-country as well as on national TVOD services**

- On TVOD, multi-country services showed a higher share (67%) of national TV seasons than national services (55%) in their EU27 content offering.
- In absolute numbers also, multi-country services offered a bigger number of EU national TV seasons.

**National SVOD services strongly built their offer on national TV seasons**

- On SVOD, national services relied importantly on national TV content for their EU27 offering with two thirds (66%) of TV seasons being national.
- EU27 non-national content represented 77% of the EU27 offering on multi-country SVOD services.
- As on TVOD, in absolute terms multi-country services offered more EU TV seasons in volume and thus also more national content.
EU27 TV content on TVOD catalogues was mainly national TV seasons (60%).

On the contrary, EU non-national TV seasons represented two thirds (67%) of the contents on SVOD, led by global services’ strategy of acquiring EU27 content to make it available in all covered countries.

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

- EU27 non-national: 3,340 (40%)
- National: 5,113 (60%)
- Total: 8,453 EU27 TV seasons

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

- EU27 non-national: 14,447 (67%)
- National: 7,209 (33%)
- Total: 21,656 EU27 TV seasons

Source: JustWatch data
EU27: bigger offer of national TV content on multi-country TVOD services

On TVOD, multi-country services showed a higher share (67%) of national TV seasons, showing their growing interest in offering in each covered country more EU27 local content.

National TVOD services also offered more national than non-national EU27 content.

In absolute numbers, there were more national TV seasons on multi-country TVOD services.

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

- **EU27 non-national**
  - 1,336
  - 33%

- **National**
  - 2,689
  - 67%

**4,025 TV seasons**

**TVOD national services - National vs EU non-national seasons**

- **EU27 non-national film**
  - 2,004
  - 45%

- **National**
  - 2,424
  - 55%

**4,428 TV seasons**

Source: JustWatch data
On SVOD, national services also relied importantly on national TV content for their EU27 offering with a 66% share of national TV seasons. Multi-country services offered mainly non-national European content. The total TV seasons offer was bigger on multi-country SVOD services, though, and thus, in absolute numbers more national TV seasons were available.

Source: JustWatch data
TV content was analysed in cumulated number of EU27 non-national seasons.

On TVOD services, German & French TV seasons dominated the export of EU27 TV content (with almost half of the offer)
- Followed by TV seasons from Scandinavia, Austria, Italy, Ireland and Spain.
- On multi-country TVOD services, French and Swedish content exported better than German.
- British TV seasons dominated the export of other European TV content on TVOD services with 94% of total.

On SVOD too, Germany and France appeared as the top EU27 TV content exporters (with half of the offer)
- EU4 (France, Germany, Spain and Italy) provided 68% of all EU27 TV seasons exported on SVOD.
- Multi-country SVOD services again showed EU4 main origin of exports (68%), but not in national SVOD catalogues, in which Belgian and Scandinavian content exported better than Italian or Spanish.
- As for TVOD, British TV seasons made up the lion share of other European seasons on SVOD with 92% of total.

A big presence in number of seasons did not ensure a better export of content
- Countries with a lower number of TV seasons available showed a better country export rate.

Better export rates and country reach on SVOD than on TVOD.
- Ireland provided almost half of top 20 exported seasons on TVOD, with 9 fiction TV seasons.
- 6 Irish fiction TV seasons and 5 Danish animated TV seasons among the most exported seasons on SVOD.
21 EU27 countries exported their TV content on non-national EU27 TVOD services

- German and French TV seasons, with almost half of the offer, dominated the export of EU27 TV content on TVOD services, followed by Scandinavian and Austrian content.
- EU4: Italian and, particularly, Spanish TV seasons struggled to circulate on EU27 TVOD catalogues.

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

Source: JustWatch data

(*) Partly due to the weight of German and Austrian services in the sample.
Origin of EU27 TV content for multi-country and national TVOD catalogues differed

- On multi-country TVOD services, half of EU27 exported content was of French, Swedish or German* origin, and together with Danish, Irish and Austrian* content, it represented most of the offer (77%).
- While on national TVOD services, German*, French, Austrian*, Swedish and Italian seasons represented the bulk (80%) of all EU27 exported TV seasons.

Export of EU27 TV seasons in 34 multi-country TVOD catalogues

- FR, 290, 22%
- SE, 225, 17%
- DE, 155, 12%
- DK, 139, 10%
- IE, 123, 9%
- AT, 96, 7%
- IT, 95, 7%
- ES, 48, 4%
- BE, 64, 5%
- FI, 32, 2%
- CZ, 26, 2%

- 5 other countries, 43, 3%

Export of EU27 TV seasons in 15 national TVOD catalogues

- DE, 820, 41%
- FR, 338, 17%
- AT, 166, 8%
- IT, 114, 6%
- SE, 158, 8%
- IE, 71, 3%
- DK, 80, 4%
- BE, 81, 4%
- ES, 51, 3%
- CZ, 38, 2%
- 10 other countries, 87, 4%

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

Source: JustWatch data
British TV seasons dominated the export of other European TV content on TVOD services with 94% of the total offer.

TV seasons from Norway, Switzerland, Russia, Turkey and Iceland completed the offer.

Source: JustWatch data
A big presence in number of seasons does not ensure a better circulation of content

Countries with lower number of TV seasons had a better country circulation (Ireland showed the best average), as opposed to the numerous TV seasons from Germany which were exported only in an average 1.5 countries.

Culturally close countries were targeted export territories: 97% of Austrian content was exported to Germany, and 82% of German, to Austria. Luxembourg, Sweden and Finland showed similar average exports circulation, but many more Swedish TV seasons circulated abroad.

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

Read the matrix as: 248 French TV seasons were exported with an average country presence in 2.5 countries

Source: JustWatch data
Ireland provided almost half of top 20 export seasons on TVOD, with 9 fiction TV seasons. The top list was completed by Italian, Swedish and French fiction TV seasons. 14 seasons were co-productions (only 3 exclusively European) and main co-producer was Canada (9). The median production year was 2014 and 60% were produced before 2015.

Top 20 EU27 exported TV seasons in 49 TVOD catalogues

<table>
<thead>
<tr>
<th>Season name</th>
<th>Year of production</th>
<th>Production country</th>
<th>Export EU catalogues</th>
<th>Export EU countries</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Tudors S4</td>
<td>2010</td>
<td>IE,CA,US,GB</td>
<td>16</td>
<td>8</td>
</tr>
<tr>
<td>Vikings S1</td>
<td>2013</td>
<td>IE,CA</td>
<td>16</td>
<td>7</td>
</tr>
<tr>
<td>The Tudors S2</td>
<td>2008</td>
<td>IE,CA,US,GB</td>
<td>14</td>
<td>7</td>
</tr>
<tr>
<td>The Tudors S3</td>
<td>2009</td>
<td>IE,CA,US,GB</td>
<td>14</td>
<td>7</td>
</tr>
<tr>
<td>Vikings S2</td>
<td>2014</td>
<td>IE,CA</td>
<td>14</td>
<td>7</td>
</tr>
<tr>
<td>Vikings S3</td>
<td>2015</td>
<td>IE,CA</td>
<td>14</td>
<td>7</td>
</tr>
<tr>
<td>The Tudors S1</td>
<td>2015</td>
<td>IE,CA,US,GB</td>
<td>13</td>
<td>6</td>
</tr>
<tr>
<td>Vikings S6</td>
<td>2019</td>
<td>IE,CA,US,GB</td>
<td>12</td>
<td>7</td>
</tr>
<tr>
<td>Morden i Sandhamn S1</td>
<td>2010</td>
<td>SE</td>
<td>12</td>
<td>5</td>
</tr>
<tr>
<td>L’amica geniale S1</td>
<td>2018</td>
<td>IT,US</td>
<td>11</td>
<td>6</td>
</tr>
<tr>
<td>Vikings S4</td>
<td>2016</td>
<td>IE,CA</td>
<td>11</td>
<td>5</td>
</tr>
<tr>
<td>Bron/Broen S3</td>
<td>2015</td>
<td>SE,DK,DE</td>
<td>10</td>
<td>6</td>
</tr>
<tr>
<td>Gomorra - La serie S3</td>
<td>2017</td>
<td>IT,DE</td>
<td>10</td>
<td>6</td>
</tr>
<tr>
<td>Gomorra - La serie S1</td>
<td>2014</td>
<td>IT,DE</td>
<td>10</td>
<td>5</td>
</tr>
<tr>
<td>L’amica geniale S2</td>
<td>2020</td>
<td>IT,US</td>
<td>10</td>
<td>5</td>
</tr>
<tr>
<td>Morden i Sandhamn S2</td>
<td>2012</td>
<td>SE</td>
<td>10</td>
<td>5</td>
</tr>
<tr>
<td>Morden i Sandhamn S4</td>
<td>2014</td>
<td>SE</td>
<td>10</td>
<td>5</td>
</tr>
<tr>
<td>Au service de la France S1</td>
<td>2015</td>
<td>FR</td>
<td>10</td>
<td>4</td>
</tr>
<tr>
<td>Ainsi soient-ils S1</td>
<td>2012</td>
<td>FR</td>
<td>9</td>
<td>3</td>
</tr>
<tr>
<td>Ainsi soient-ils S2</td>
<td>2014</td>
<td>FR</td>
<td>9</td>
<td>3</td>
</tr>
</tbody>
</table>
25 EU27 countries exported their TV content on non-national EU27 SVOD services

On SVOD, Germany (25%) and France (24%) appeared again as the top EU27 TV content exporters. EU4 (Germany, France, Spain and Italy, the four biggest production capacity countries in the EU) provided 68% of all EU27 TV seasons exported on SVOD.

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

Source: JustWatch data
Multi-country and national SVOD mainly built on German and French TV content

- Half of content on SVOD multi-country services was French or German* and EU4 provided 68% of offer.
- On national SVOD catalogues, Belgian TV seasons were third in EU non-national content offer while Spanish content circulated less (contrarily to the presence of Spanish TV series on global services).
- Scandinavian and Italian content was exported in same proportions on VOD services.

Export of EU TV seasons in 277 multi-country SVOD catalogues

Export of EU TV seasons in 30 national SVOD catalogues

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

Source: JustWatch data
On SVOD also, Other European most exported TV seasons were fundamentally British. As for TVOD, British TV seasons made up the lion share of other European TV seasons on SVOD with 92%. Turkey, Norway and Russia made up a bigger share of TV seasons than on TVOD, shyly followed by Iceland, Switzerland and Albania to complete the Other European TV seasons exports on SVOD.

Source: JustWatch data

SVOD – Other European TV seasons, by country of origin

- GB, 18497, 92%
- TR, 598, 3%
- NO, 439, 2%
- RU, 377, 2%
- IS, 126, 1%
- CH, 100, 0%
- AL, 14, 0%
Global SVOD catalogues tend to make available their content on every country in which they operate, which increases circulation. Of EU4, Spanish content circulated the best, followed by Italian, French and German. Only Irish TV seasons circulated in more countries. The Netherlands and Sweden reached 4.4 countries of export but there was almost three times more Swedish content available.

On SVOD, better export results due to the global players’ distribution strategy

<table>
<thead>
<tr>
<th>Country</th>
<th>Number of TV seasons</th>
<th>Average country presence</th>
</tr>
</thead>
<tbody>
<tr>
<td>IE</td>
<td>69</td>
<td>9.4</td>
</tr>
<tr>
<td>CY</td>
<td>5</td>
<td>8.8</td>
</tr>
<tr>
<td>ES</td>
<td>200</td>
<td>8.9</td>
</tr>
<tr>
<td>DK</td>
<td>112</td>
<td>8.2</td>
</tr>
<tr>
<td>PL</td>
<td>41</td>
<td>7.6</td>
</tr>
<tr>
<td>GR</td>
<td>5</td>
<td>7.2</td>
</tr>
<tr>
<td>IT</td>
<td>141</td>
<td>7.3</td>
</tr>
<tr>
<td>HR</td>
<td>8</td>
<td>7.0</td>
</tr>
<tr>
<td>FI</td>
<td>37</td>
<td>6.8</td>
</tr>
<tr>
<td>LU</td>
<td>5</td>
<td>6.6</td>
</tr>
<tr>
<td>RO</td>
<td>8</td>
<td>6.1</td>
</tr>
<tr>
<td>NL</td>
<td>69</td>
<td>4.4</td>
</tr>
<tr>
<td>CZ</td>
<td>50</td>
<td>3.3</td>
</tr>
<tr>
<td>PT</td>
<td>7</td>
<td>4.0</td>
</tr>
<tr>
<td>HU</td>
<td>9</td>
<td>3.7</td>
</tr>
<tr>
<td>BG</td>
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<td>3.3</td>
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<tr>
<td>LV</td>
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<tr>
<td>AT</td>
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<tr>
<td>SK</td>
<td>3</td>
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</tr>
<tr>
<td>LT</td>
<td>10</td>
<td>1.1</td>
</tr>
<tr>
<td>EE</td>
<td>3</td>
<td>1.0</td>
</tr>
<tr>
<td>DE</td>
<td>1914</td>
<td>1.9</td>
</tr>
</tbody>
</table>

Source: JustWatch data

Read the matrix as: 623 French TV seasons were exported with an average country presence in 5.5 countries.
6 Irish fiction TV seasons and 5 Danish animated TV seasons among the most exported seasons on SVOD.

The top list is completed by French animated seasons and Italian fiction series.

16 seasons were co-productions, of which just 5 with only European countries. Nine co-productions from European countries with Canada (animation and fiction) and four with Asia (specific to the animation industry).

The median production year was 2017 (2018 for animation) and 80% were produced in 2015 or later.

Top 20 EU27 exported TV seasons in 307 SVOD catalogues

<table>
<thead>
<tr>
<th>Season name</th>
<th>Year of production</th>
<th>Production country</th>
<th>Export EU catalogues</th>
<th>Export EU countries</th>
</tr>
</thead>
<tbody>
<tr>
<td>Molang S1</td>
<td>2015</td>
<td>FR,US,GB</td>
<td>51</td>
<td>18</td>
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<tr>
<td>Ninjago: Masters of Spinjitzu S9</td>
<td>2018</td>
<td>DK,SG,CA,US</td>
<td>46</td>
<td>18</td>
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<tr>
<td>LEGO Friends: Girls on a Mission S1</td>
<td>2018</td>
<td>DK</td>
<td>45</td>
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<td>Vikings S1</td>
<td>2013</td>
<td>IE,CA</td>
<td>44</td>
<td>18</td>
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<tr>
<td>Ninjago: Masters of Spinjitzu S10</td>
<td>2019</td>
<td>DK,SG,CA,US</td>
<td>43</td>
<td>18</td>
</tr>
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<td>Vikings S3</td>
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<td>43</td>
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<td>Vikings S2</td>
<td>2014</td>
<td>IE,CA</td>
<td>42</td>
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<tr>
<td>Grizzy et les Lemmings S2</td>
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<td>FR</td>
<td>39</td>
<td>18</td>
</tr>
<tr>
<td>Vikings S4</td>
<td>2016</td>
<td>IE,CA</td>
<td>39</td>
<td>18</td>
</tr>
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<td>Vikings S5</td>
<td>2017</td>
<td>IE,CA</td>
<td>39</td>
<td>17</td>
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<tr>
<td>Grizzy et les Lemmings S1</td>
<td>2016</td>
<td>FR</td>
<td>38</td>
<td>18</td>
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<tr>
<td>Ninjago: Masters of Spinjitzu S1</td>
<td>2011</td>
<td>DK,SG,CA,US</td>
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<td>18</td>
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<td>Ninjago: Masters of Spinjitzu S8</td>
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<td>DK,SG,CA,US</td>
<td>36</td>
<td>18</td>
</tr>
<tr>
<td>4 Blocks S1</td>
<td>2017</td>
<td>DE</td>
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<td>18</td>
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<td>Gomorra - La serie S1</td>
<td>2014</td>
<td>IT,DE</td>
<td>35</td>
<td>17</td>
</tr>
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<td>Vikings S6</td>
<td>2019</td>
<td>IE,CA</td>
<td>35</td>
<td>17</td>
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<td>Gomorra - La serie S2</td>
<td>2016</td>
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<tr>
<td>Gomorra - La serie S3</td>
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<td>IT,DE</td>
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<td>33</td>
<td>17</td>
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<td>PJ Masks S1</td>
<td>2015</td>
<td>FR,GB</td>
<td>33</td>
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</tr>
</tbody>
</table>

Source: JustWatch data
Annex

Services and country catalogues included in the film and TV samples
## TVOD catalogues and countries in the film sample

<table>
<thead>
<tr>
<th>Name of catalogue</th>
<th>Name of catalogue</th>
<th>Name of catalogue</th>
<th>Name of catalogue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aerovod CZ</td>
<td>Google Play Movies NL</td>
<td>Microsoft Films &amp; TV DE</td>
<td>SF Anytime SE</td>
</tr>
<tr>
<td>alles kino AT</td>
<td>Google Play Movies PL</td>
<td>Microsoft Films &amp; TV DK</td>
<td>Sky Store AT</td>
</tr>
<tr>
<td>alles kino DE</td>
<td>Google Play Movies PT</td>
<td>Microsoft Films &amp; TV ES</td>
<td>Sky Store DE</td>
</tr>
<tr>
<td>Atresplayer ES</td>
<td>Google Play Movies SE</td>
<td>Microsoft Films &amp; TV FI</td>
<td>Sky Store IE</td>
</tr>
<tr>
<td>Bbox VOD FR</td>
<td>Google Play Movies SK</td>
<td>Microsoft Films &amp; TV FR</td>
<td>Spamflix AT</td>
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<td>Microsoft Films &amp; TV IE</td>
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<td>iTunes AT</td>
<td>Microsoft Films &amp; TV IT</td>
<td>Spamflix CZ</td>
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<td>Microsoft Films &amp; TV NL</td>
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<td>Spamflix DK</td>
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<td>iTunes DE</td>
<td>MovieSaints DE</td>
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<td>iTunes DK</td>
<td>O2TV CZ</td>
<td>Spamflix FI</td>
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<td>Chili IT</td>
<td>iTunes EE</td>
<td>Orange VOD FR</td>
<td>Spamflix FR</td>
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<tr>
<td>Chili PL</td>
<td>iTunes ES</td>
<td>Pantaflix AT</td>
<td>Spamflix HU</td>
</tr>
<tr>
<td>cinema[s] @ la demande FR</td>
<td>iTunes FI</td>
<td>Pantaflix DE</td>
<td>Spamflix IE</td>
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<td>Dogwoof DE</td>
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<td>Pantaflix FR</td>
<td>Spamflix IT</td>
</tr>
<tr>
<td>Dogwoof FR</td>
<td>iTunes HU</td>
<td>Pathé Thuis NL</td>
<td>Spamflix LT</td>
</tr>
<tr>
<td>Elisa Viihde FI</td>
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Source: JustWatch, Filmtoro, Chili, La Pantalla Digital, EUROVOD catalogue data
## SVOD catalogues and countries in the film sample 1/2

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Source: JustWatch, Filmtoro, Chili, La Pantalla Digital, EUROVOD catalogue data
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Source: JustWatch data
## SVOD catalogues and countries in the TV sample 1/2

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Source: JustWatch data
More information:

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Christian.Grece@coe.int
Marta.Jimenez-Pumares@coe.int