

Film and TV content in TVOD and SVOD catalogues

2021 Edition

Christian Grece & Marta Jiménez Pumares
October 2021

A publication of the European Audiovisual Observatory



Co-funded by the
Creative Europe Programme
of the European Union



A. Main findings - Film and TV content in VOD catalogues in the EU27

B. Films in VOD catalogues in the EU27

C. TV content in VOD catalogues in the EU27

For each section, six subsections:

1. Size of catalogues
2. Number of unique content available in catalogues
3. Origin and circulation of content
4. Focus on services' core business and ownership
5. Composition of catalogues by national and EU27 non-national content
6. Focus on the export of EU27 content in the EU27 on TVOD and SVOD

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.
- ▶ If you wish to reproduce tables or graphs contained in this publication, please contact the European Audiovisual Observatory for prior approval.
- ▶ Opinions expressed in this publication are personal and do not necessarily represent the view of the European Audiovisual Observatory, its members, the Council of Europe or the European Commission.

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

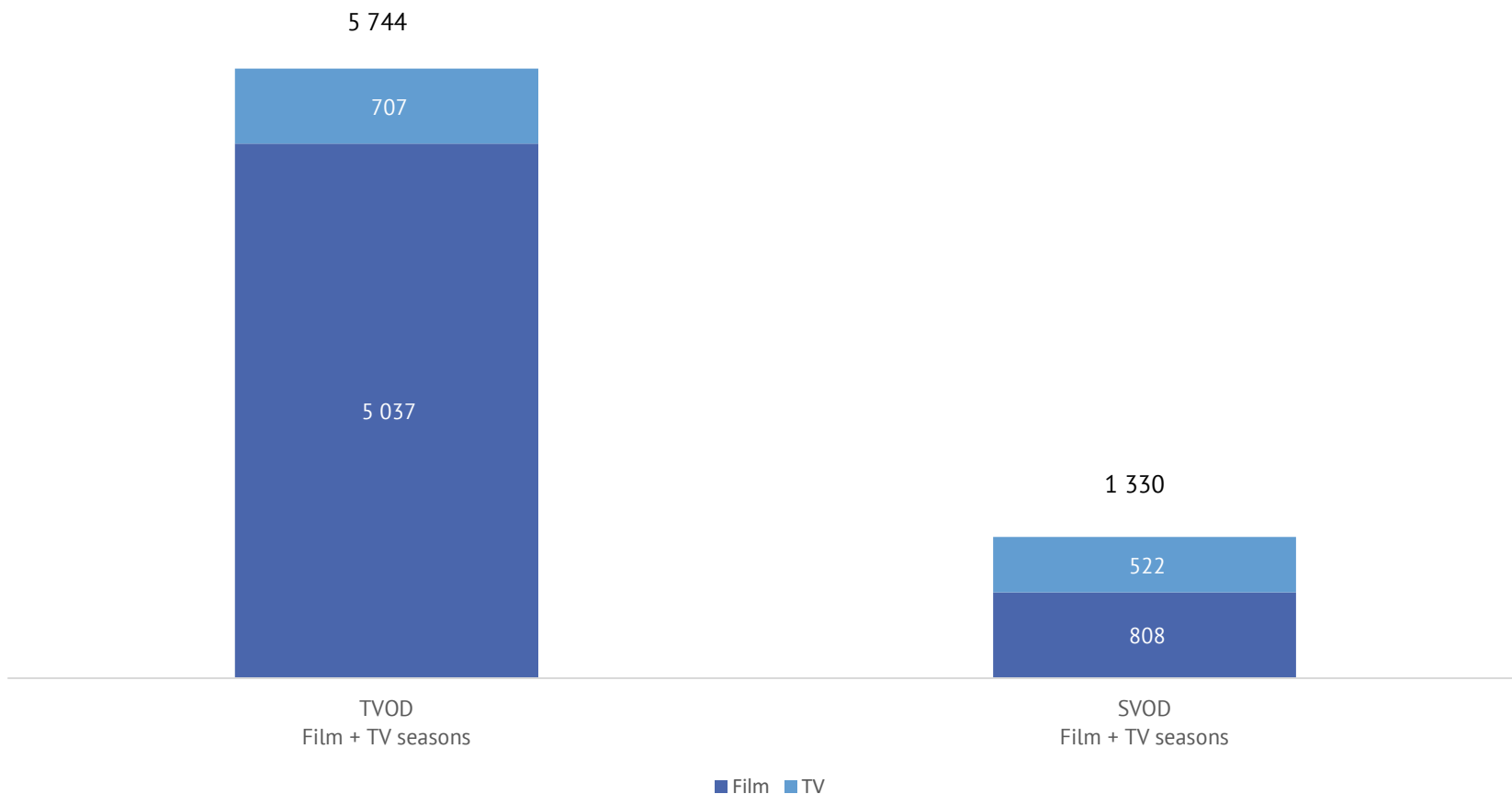
This section builds on the analysis of film + TV seasons put together, on TVOD and SVOD. The samples for film and TV content being partially different, these results should be taken as indicative.

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

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



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

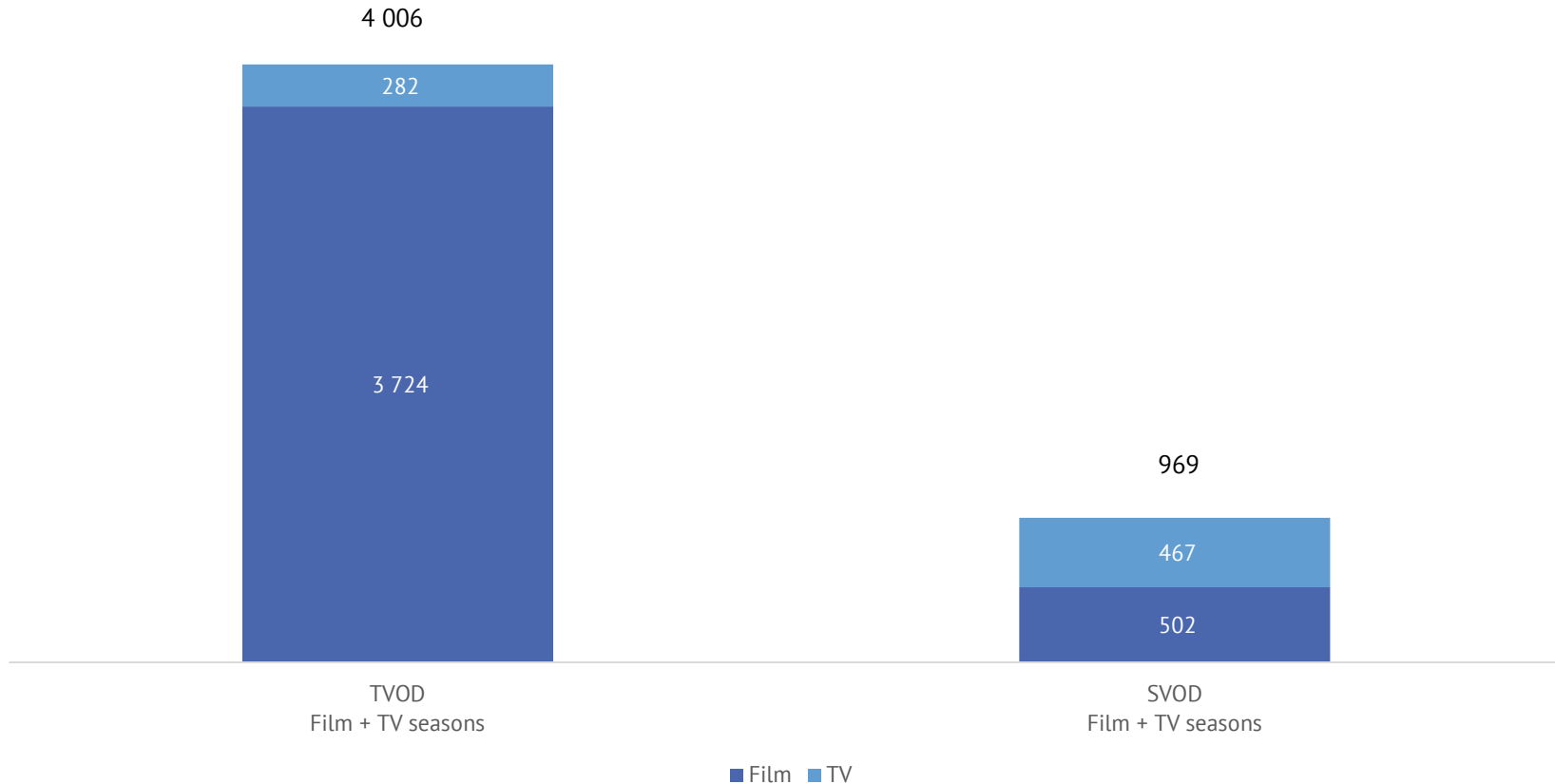
Source: JustWatch, Filmtoro, Chili, La Pantalla Digital, EUROVOD catalogue data

Median size of catalogues: offer massively based on film titles on TVOD

- ▶ 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

Size of SVOD catalogues in **median** number of titles

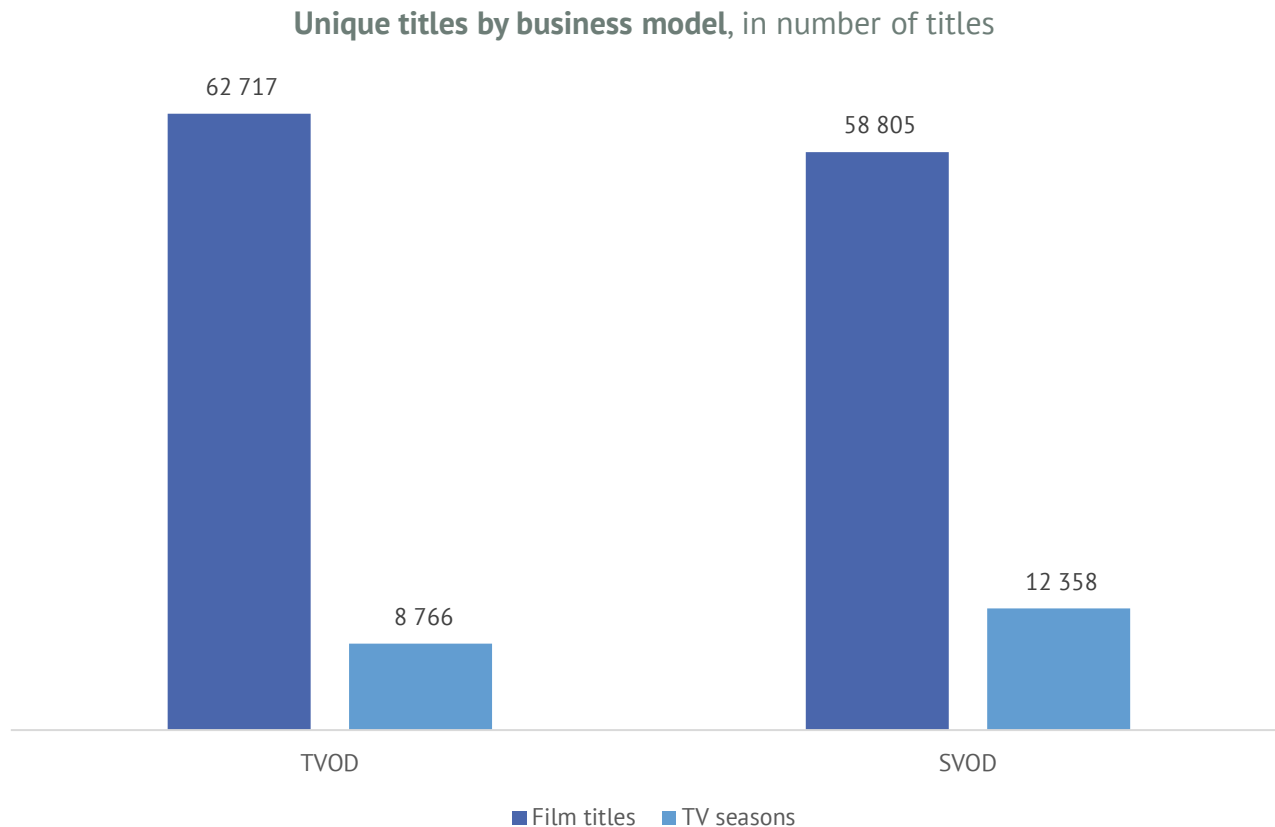


Note: the Median is calculated separately for film and TV content, and for TVOD and SVOD respectively.

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

Many more unique film titles than unique TV seasons available on VOD

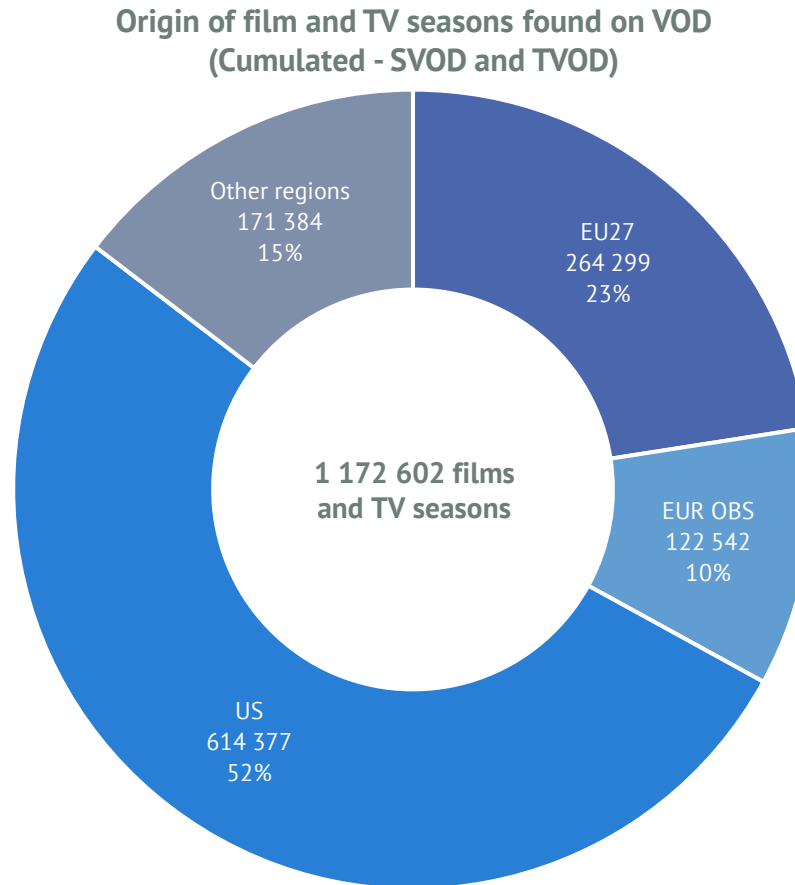
- ▶ The offer of unique film titles was much higher than the offer of unique TV seasons, with 7 times more unique film titles than TV seasons on TVOD, and 5 times more on SVOD.
- ▶ In total, TVOD services offered more unique titles than SVOD services.



Source: JustWatch, Filmtoro, 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.

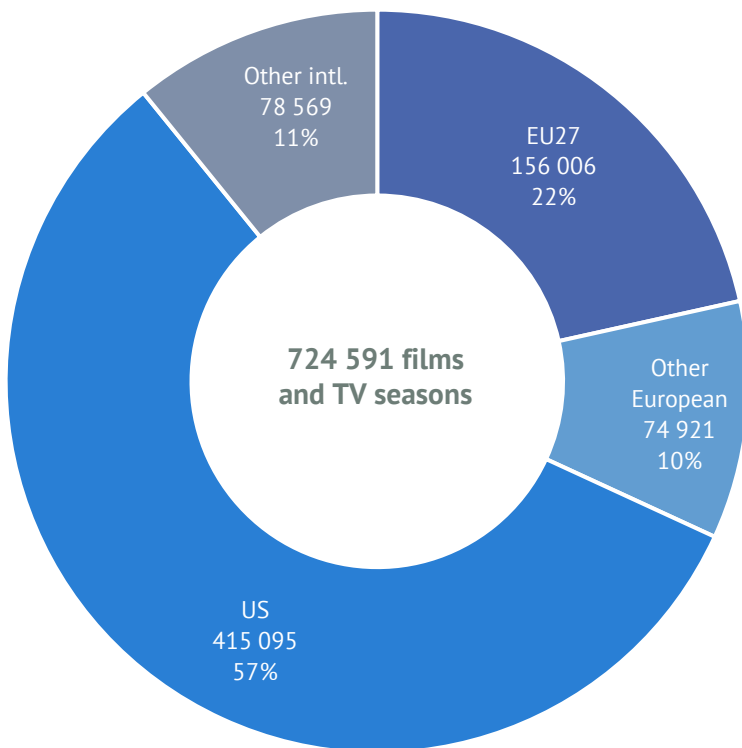


Source: JustWatch, Filmtoro, Chili, La Pantalla Digital, EUROVOD catalogue data

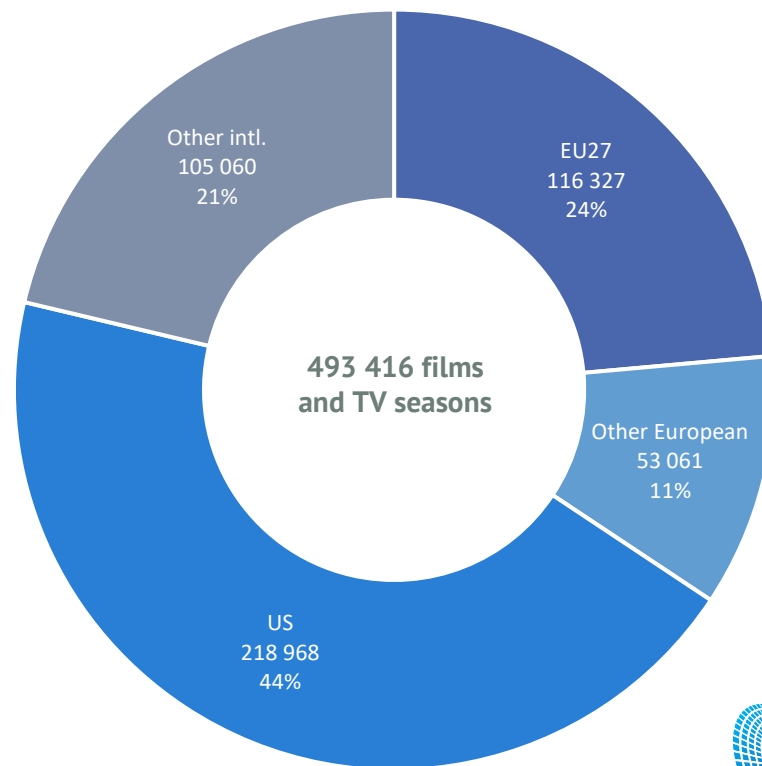
Origin by region: SVOD more European and Asian; TVOD strongly built on US

- ▶ EU27 content accounts for 22% on TVOD, 24% on TVOD
- ▶ 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



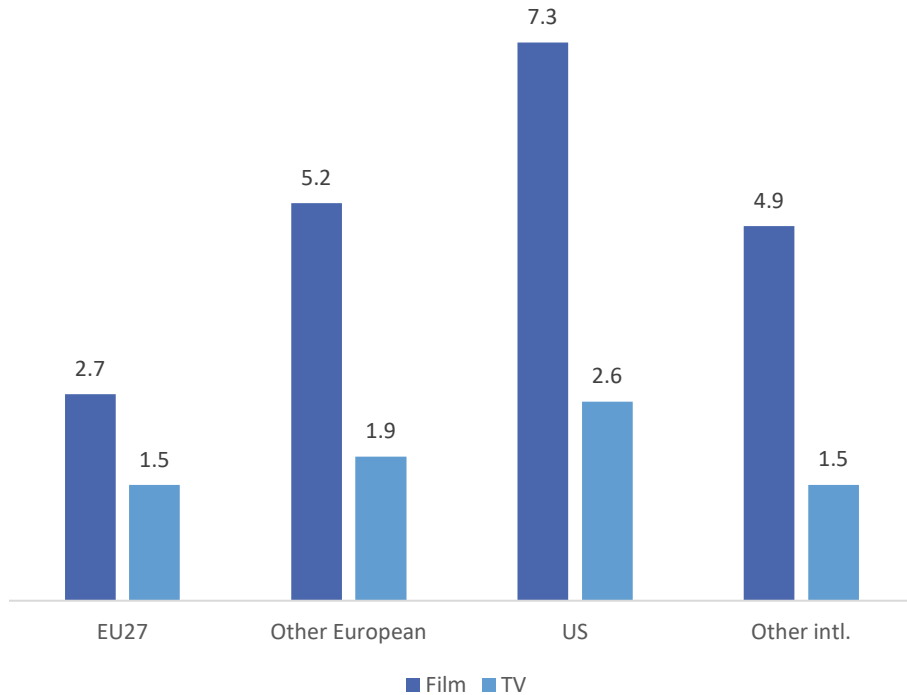
Origin of film and TV seasons found on SVOD



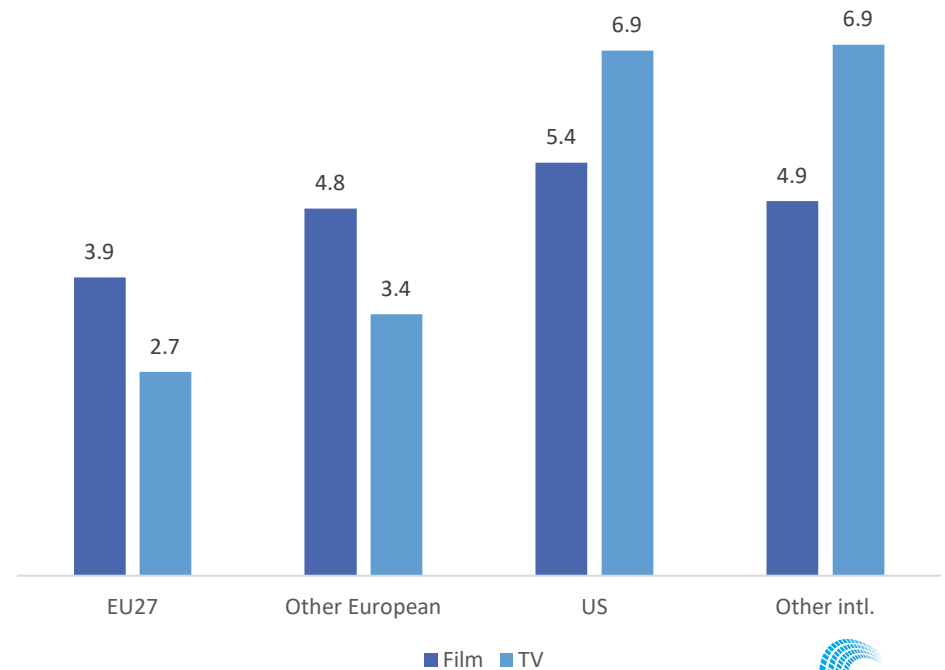
Circulation of content by region and by business model: films in more countries

- ▶ 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**



Circulation on SVOD by number of **countries**



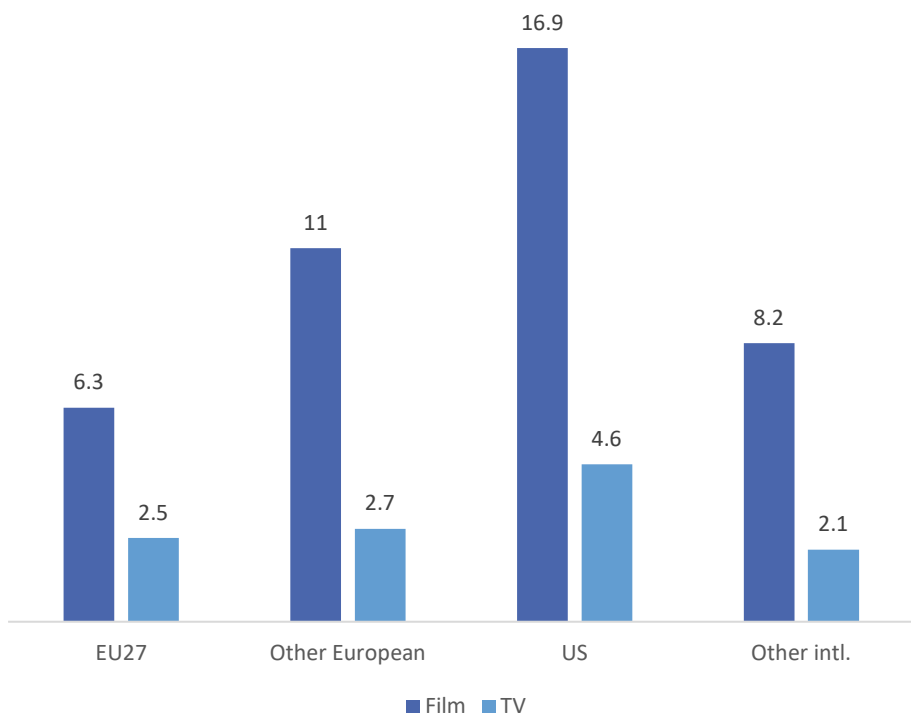
How to read these graphs: on average, a EU27 film available on TVOD in a least one country is available in 2.7 countries

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

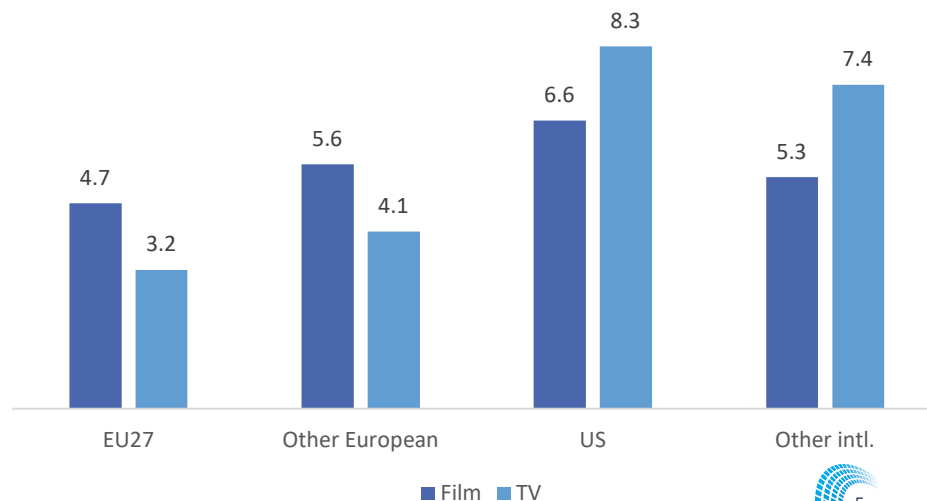
Circulation of content by region and by business model: films in more catalogues

- ▶ 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.

Circulation on TVOD by number of catalogues



Circulation on SVOD by number of catalogues

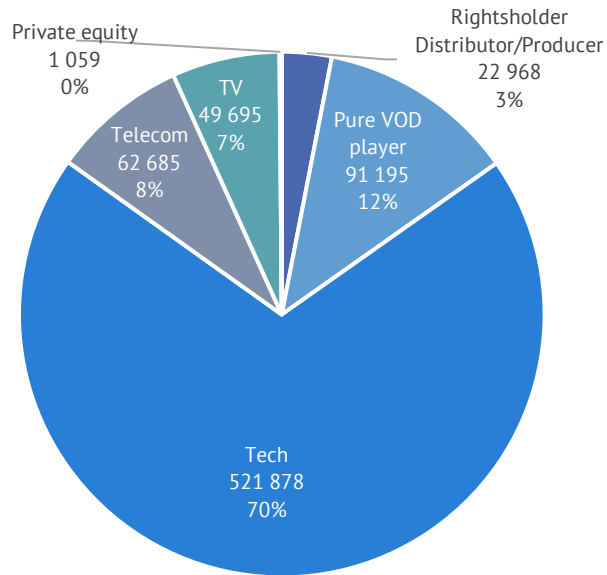


How to read these graphs: on average, a EU27 film available on TVOD in a least one catalogue is available in 4.7 catalogues.

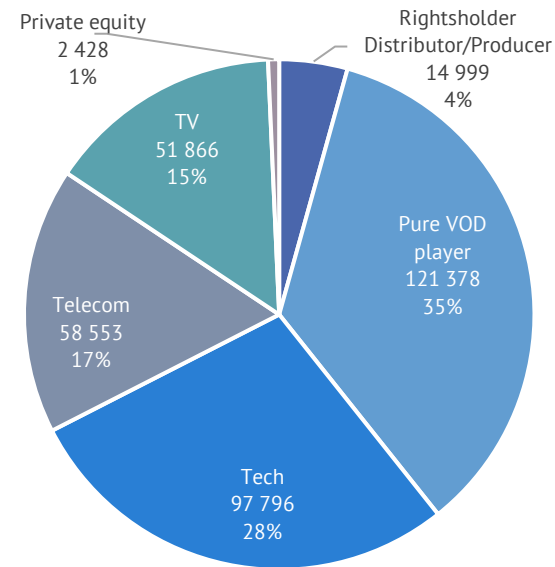
Tech and pure VOD players offer the largest amount of films and TV seasons

- ▶ 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



SVOD – Films and TV seasons in catalogues



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

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

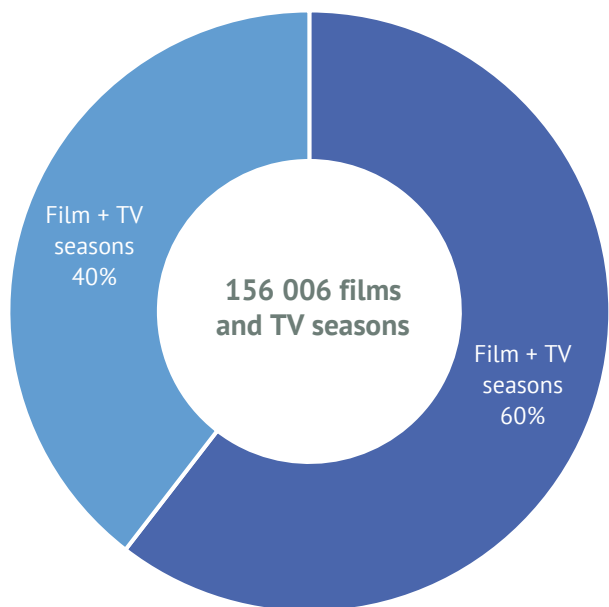
Note: TVOD catalogues, on the one hand, and SVOD catalogues, on the other hand, are not deduplicated

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

Share of national and EU27 non-national films and TV seasons in catalogues

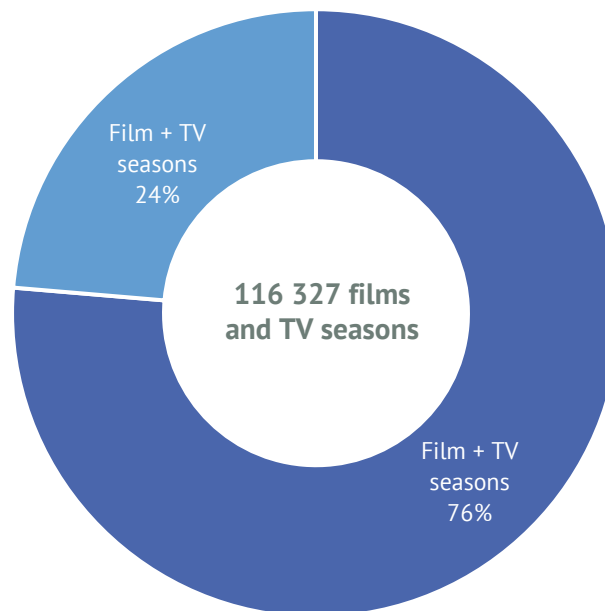
- ▶ **EU27 non-national content** represented the largest share of EU27 content, on both types of services but especially on **SVOD** where it represented three fourths of the total EU27 content offer.
- ▶ **A higher share of national content was present on TVOD catalogues**, more eager to provide local content to their clients.

Share of EU non-national and national content among EU content on TVOD



■ EU non-national ■ National

Share of EU non-national and national content among EU content on SVOD

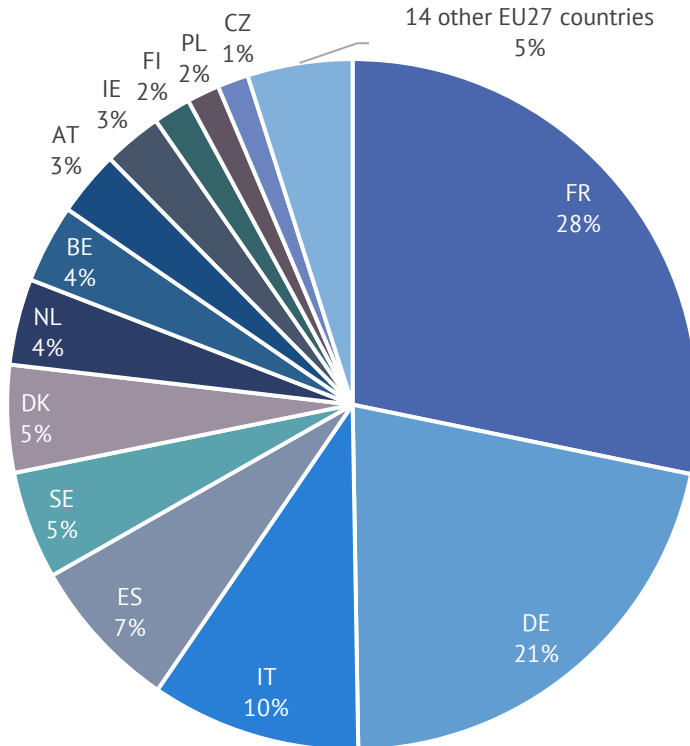


■ EU non-national ■ National

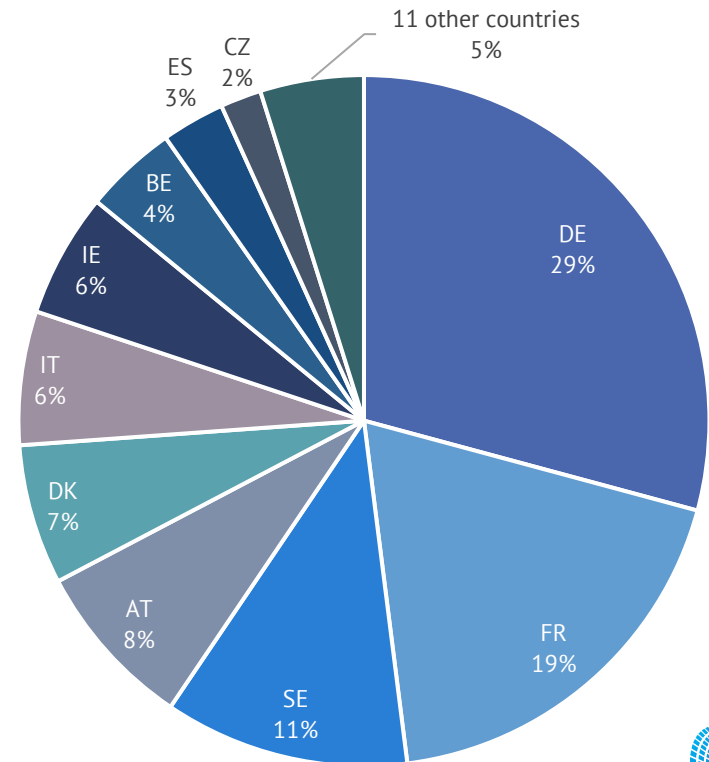
EU27 non-national content exported on TVOD: French films and German TV seasons

- ▶ 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



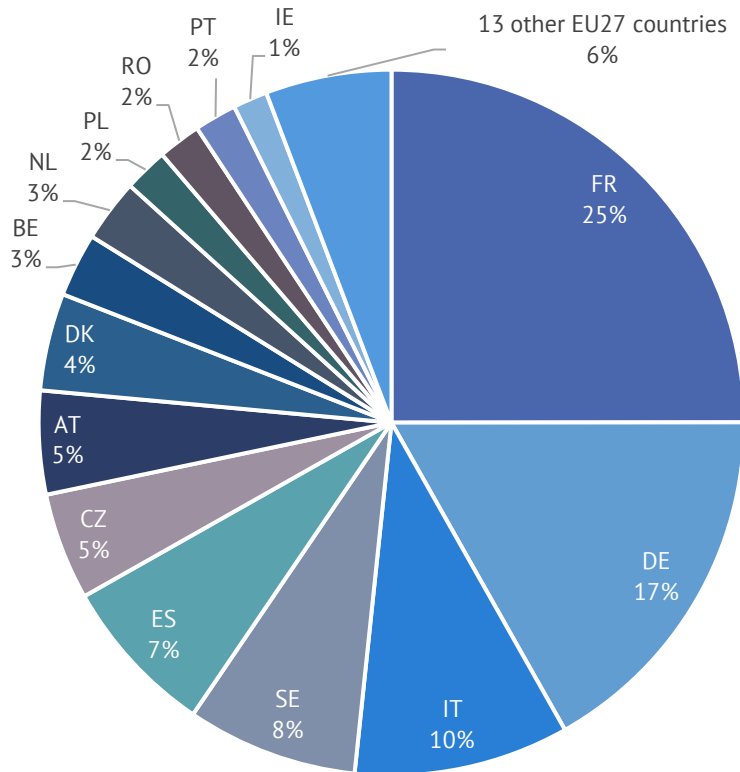
Origin of EU27 non-national TV seasons on TVOD



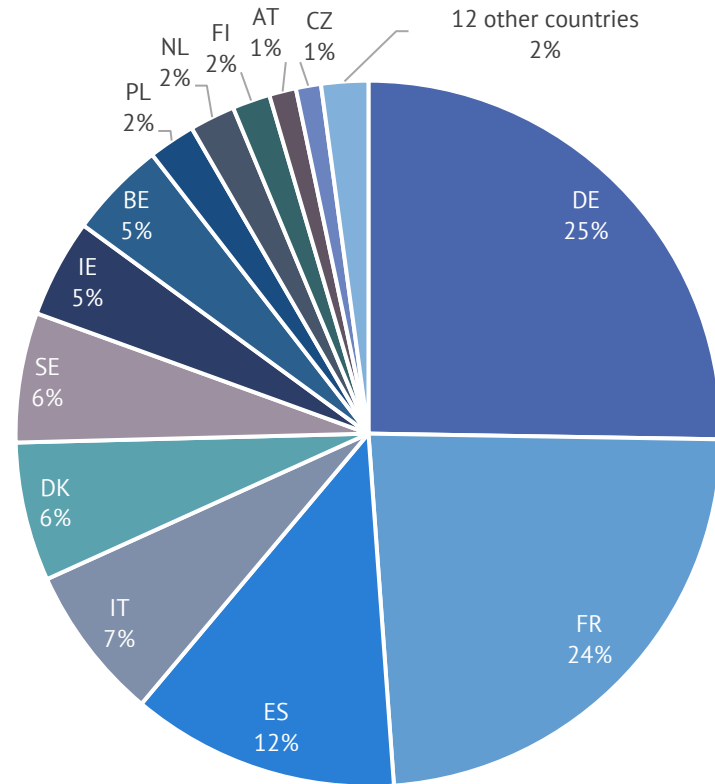
EU27 non-national content exported on SVOD: again mainly French and German

- ▶ 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.

Origin of EU non-national film titles on SVOD



Origin of EU non-national TV seasons on SVOD



Films in VOD catalogues in the EU27

Overview of
138 TVOD catalogues
and
420 SVOD catalogues

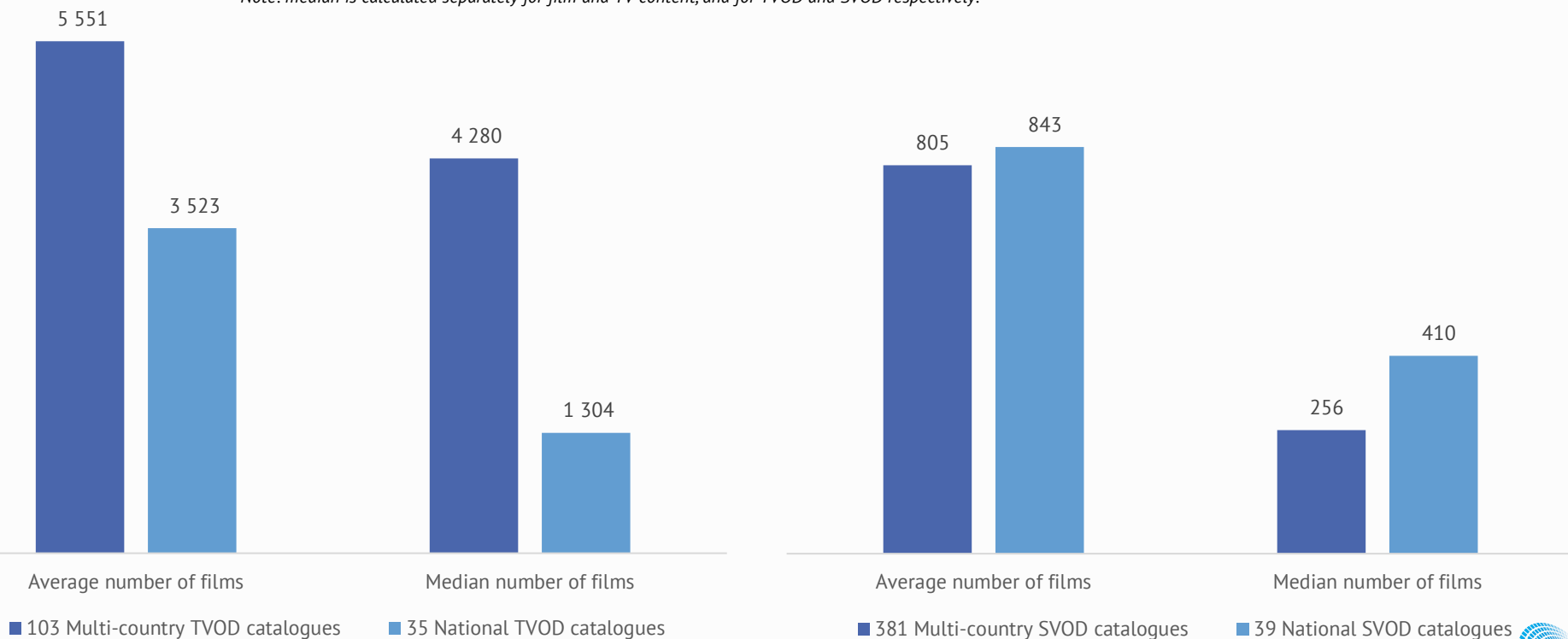
Strong differences between national and multi-country catalogues

- ▶ 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

Size of SVOD film catalogues, in number of films

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



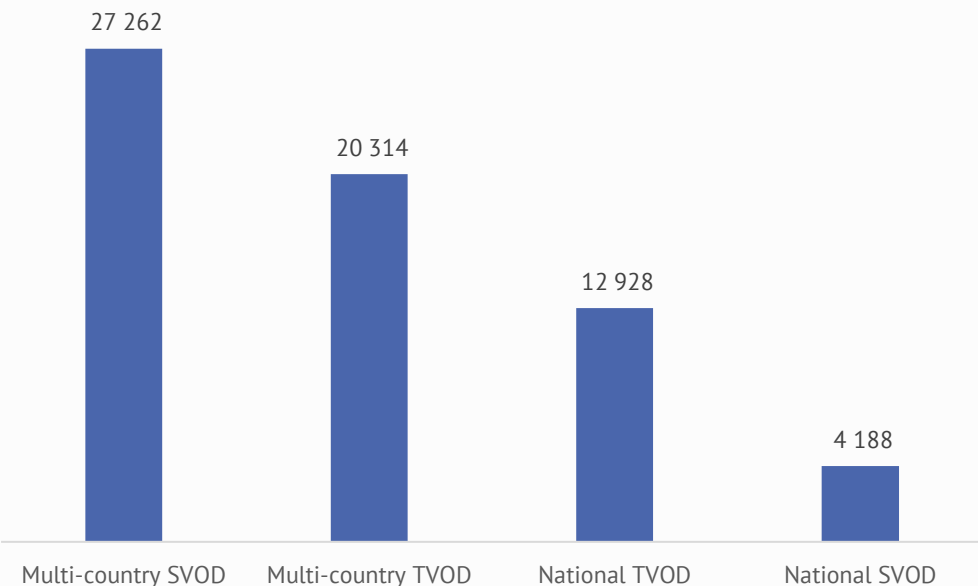
Note: Average refers to the total number of films in catalogues divided by the total number of catalogues for TVOD and SVOD services, and for multi-country and national services, respectively. The median is calculated separately for TVOD and SVOD services, and for multi-country and national services,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

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

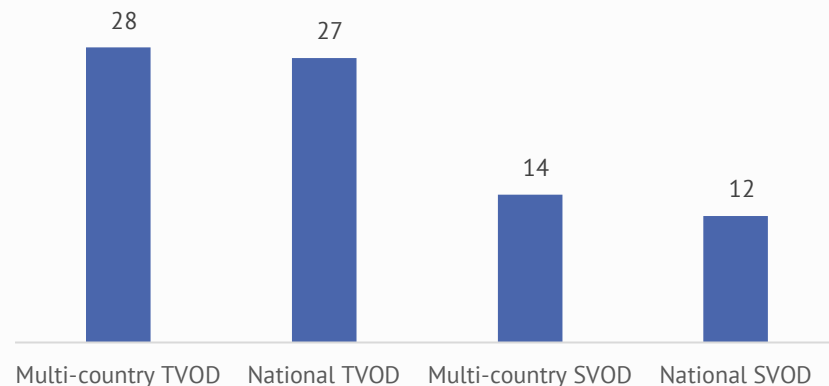
And huge disparities in the number of films for TVOD and SVOD services

- ▶ 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



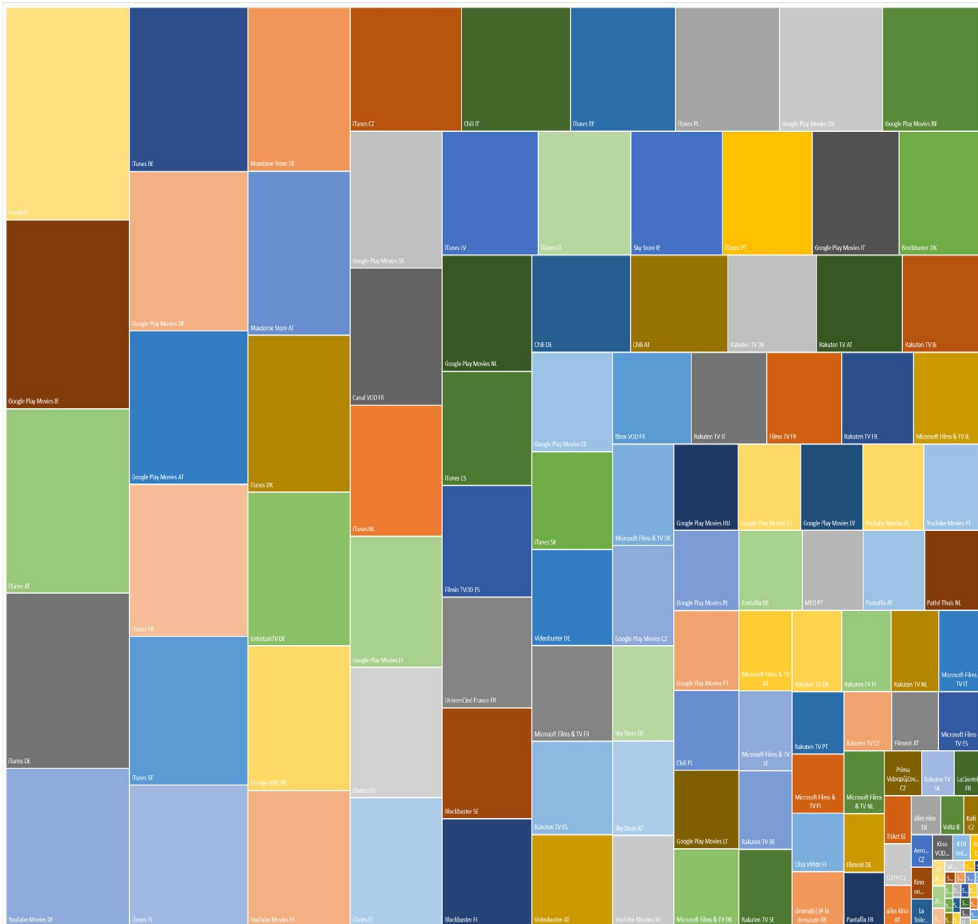
Minimum number of films in catalogue by business model



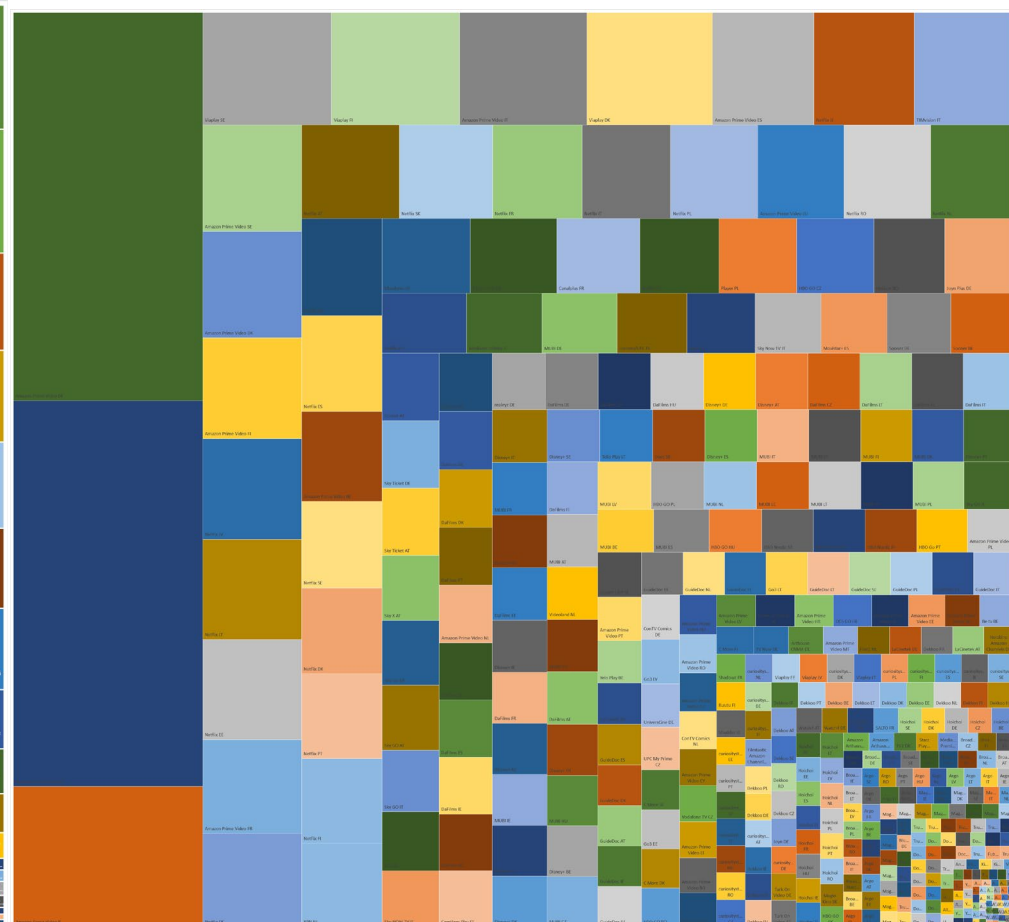
Extreme disparities in the size of VOD catalogues

- ▶ 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.

Size of 138 TVOD film catalogues, in number of films



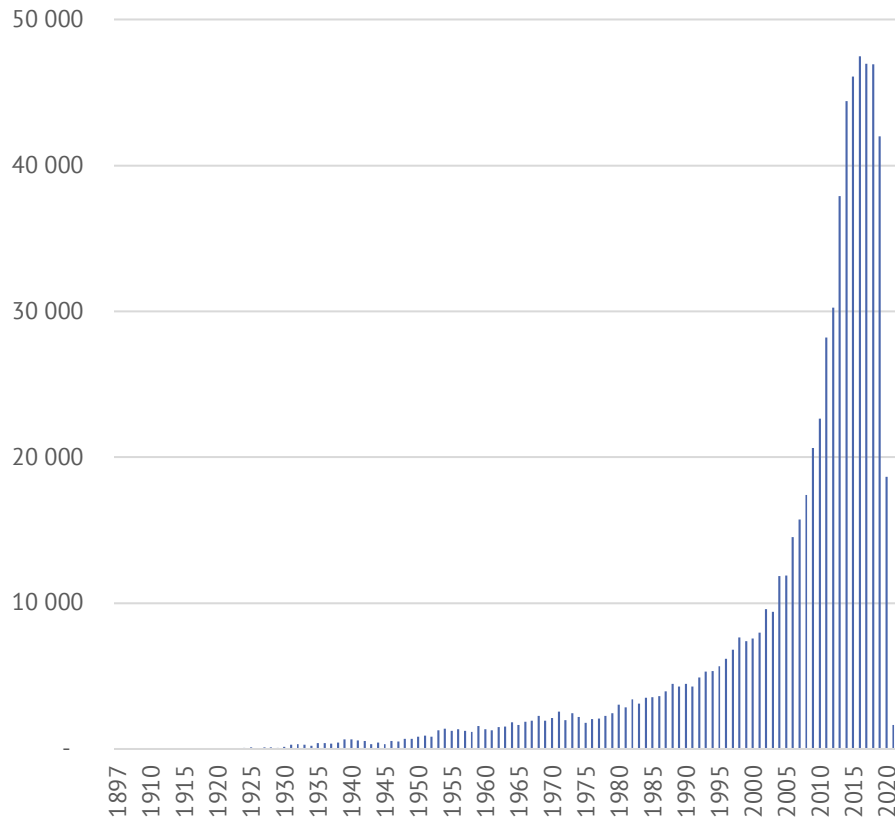
Size of 420 SVOD film catalogues, in number of films



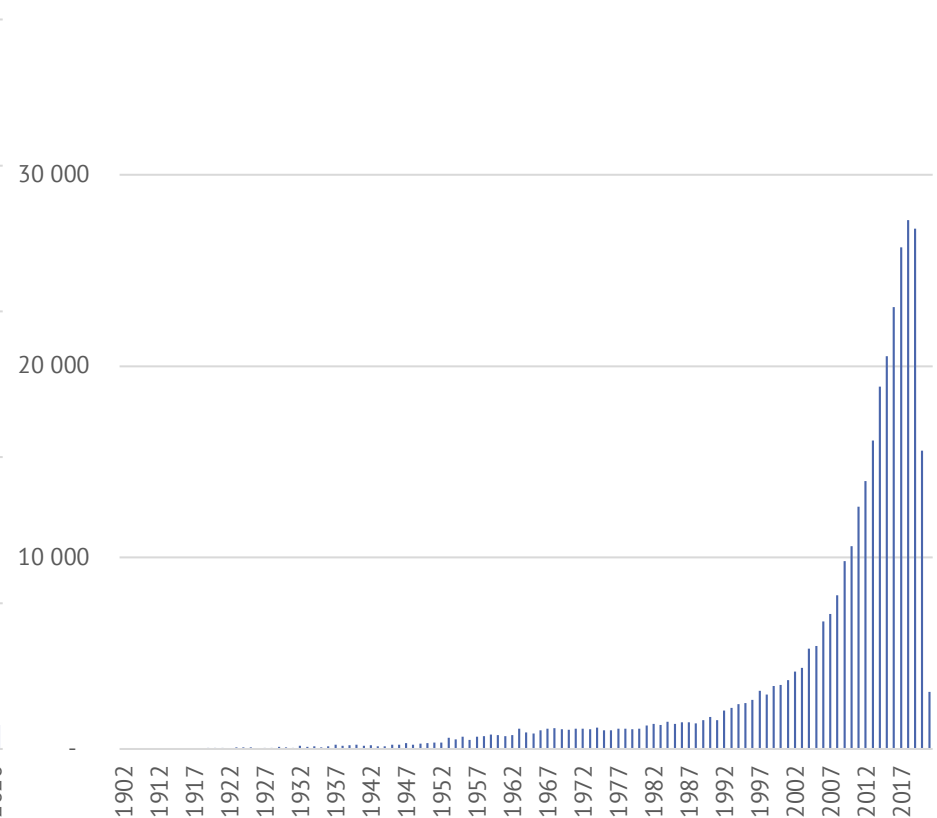
The bulk of films available on both TVOD and SVOD were less than 10 years old

- ▶ 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.

TVOD - Number of films by production year



SVOD - Number of films by production year



Source: JustWatch, Filmtoro, 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.**

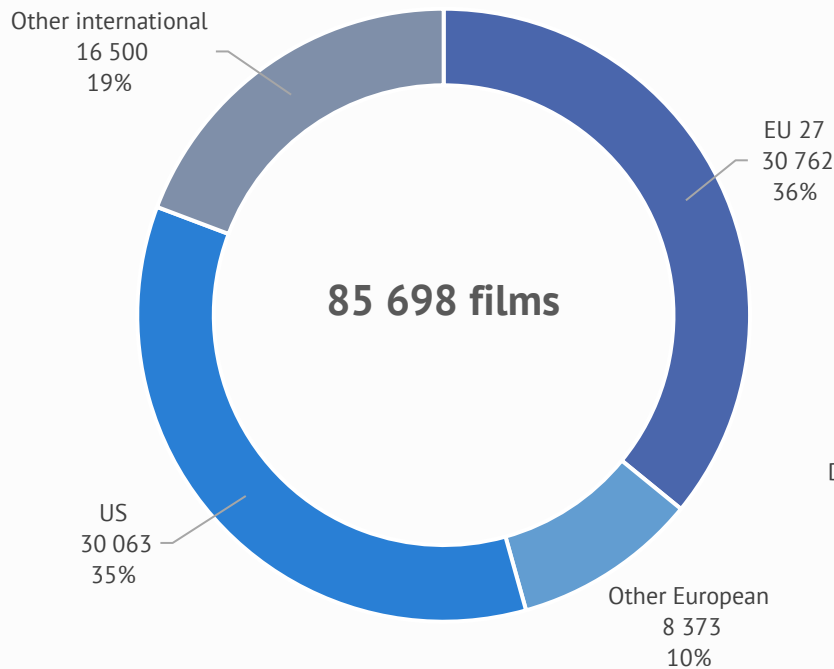
French, German, Italian and Spanish titles make up the bulk of EU titles, both on TVOD and SVOD

- ▶ 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

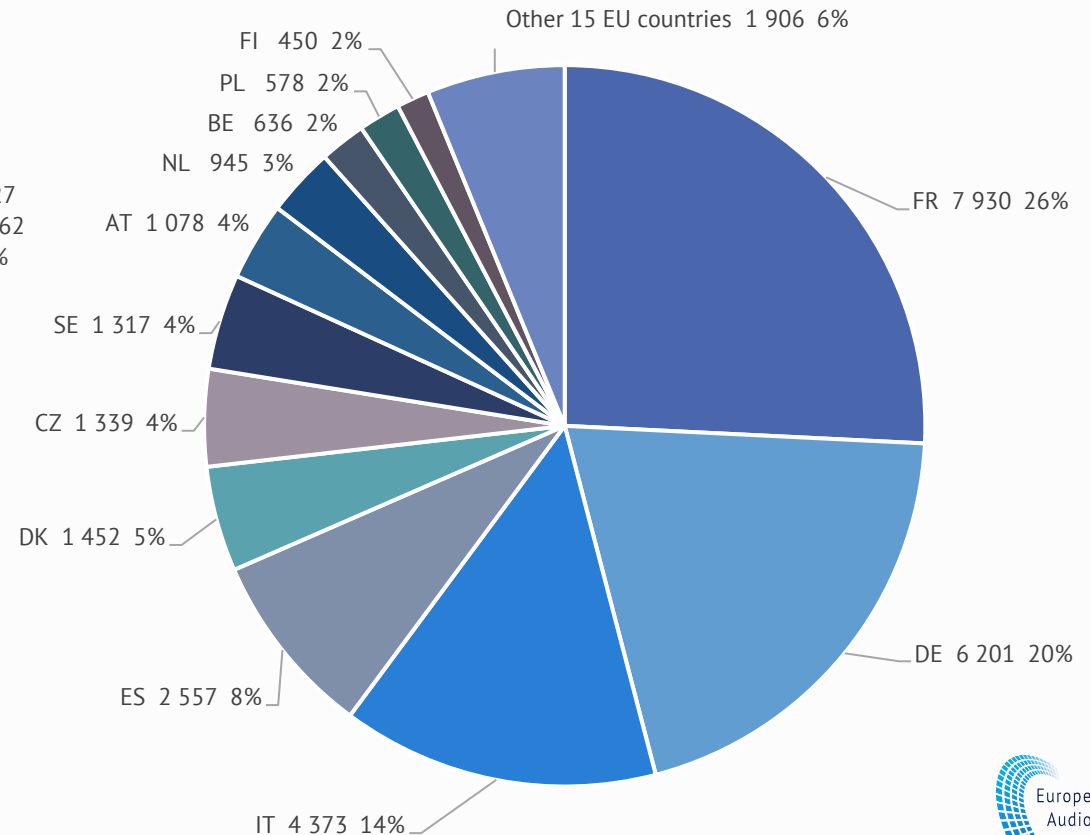
Total number of unique film titles available in VOD catalogues

- ▶ 85 698 unique films 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%.

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



Origin of **unique** EU27 film titles in VOD catalogues by country of origin



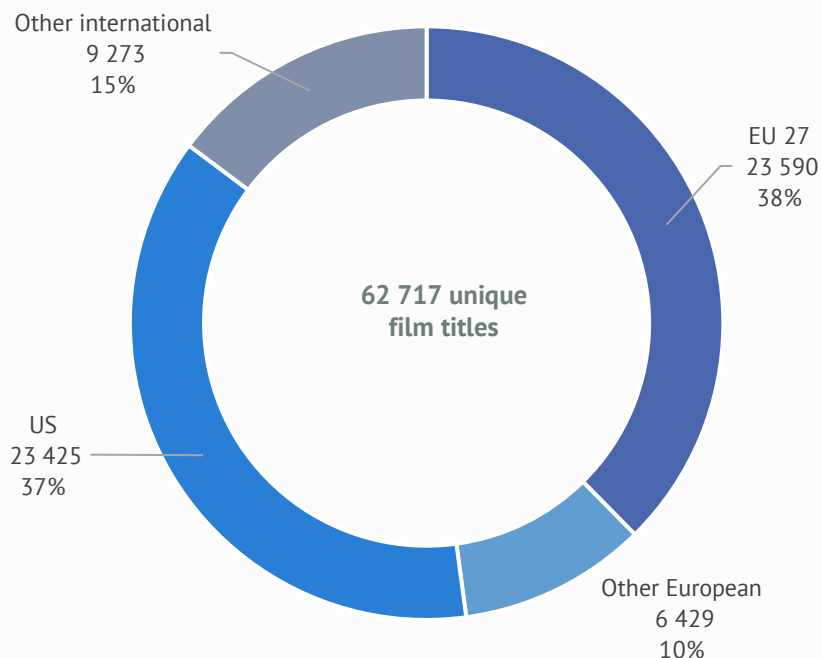
2 745 film titles could not be identified and have been excluded from the analysis. They represent 3.1% of all collected film titles.

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

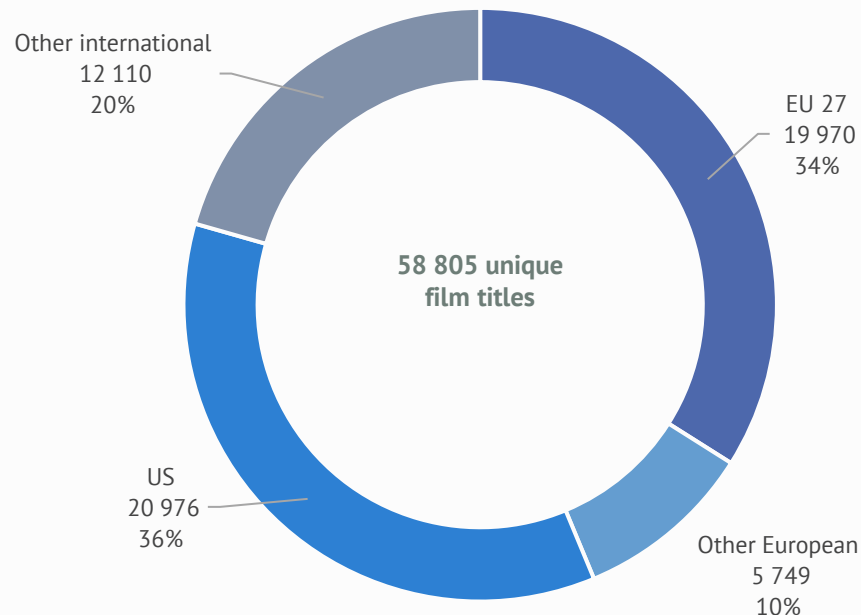
A larger choice of unique titles on TVOD

- ▶ 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



Origin of unique film titles in SVOD catalogues



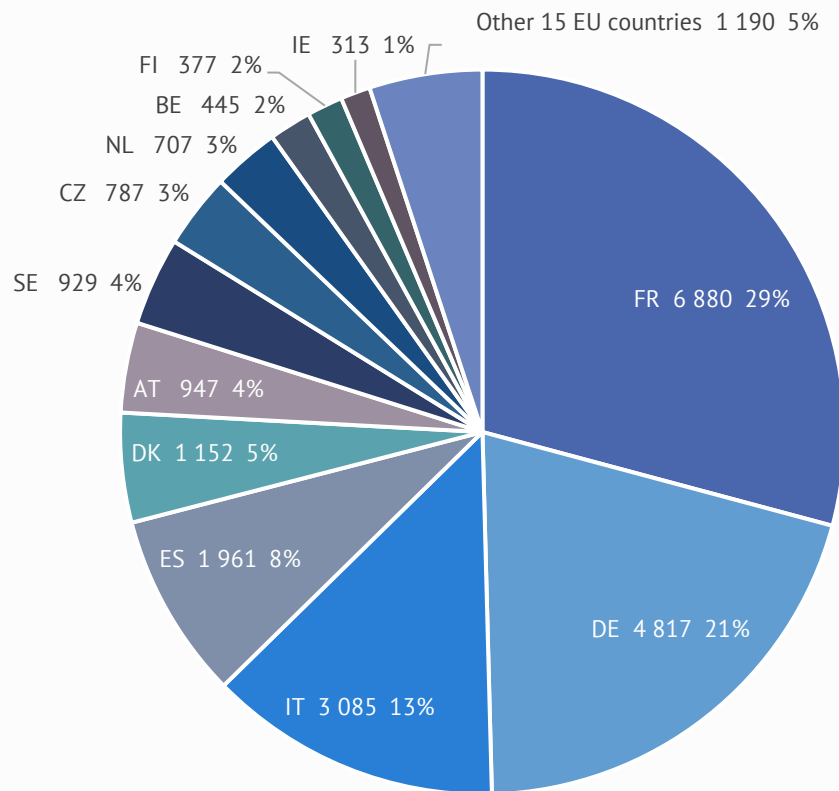
Source: JustWatch, Filmtoro, Chili, La Pantalla Digital, EUROVOD catalogue data

*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.

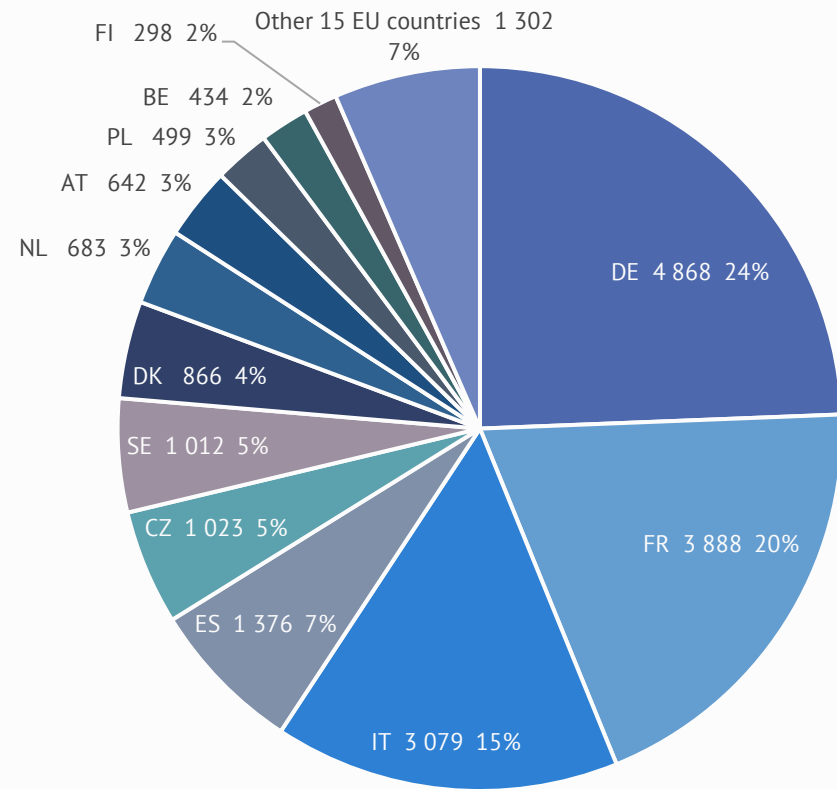
Differences in the origin of EU titles by business model

- ▶ 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.

Origin of unique EU27 film titles in TVOD catalogues



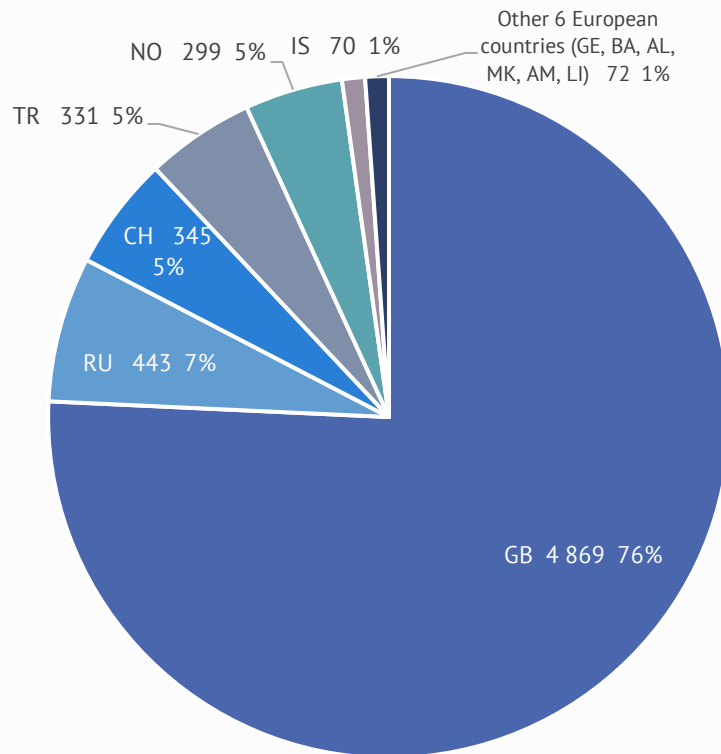
Origin of unique EU27 film titles in SVOD catalogues



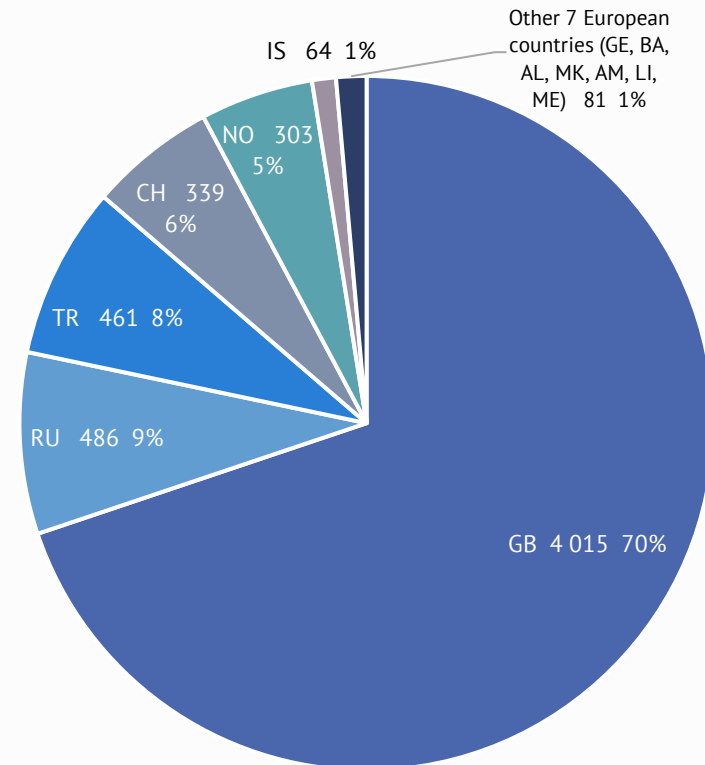
The importance of GB titles among “other European” film titles

- ▶ 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.

Origin of unique other European film titles in TVOD catalogues



Origin of unique other European film titles in SVOD catalogues



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.

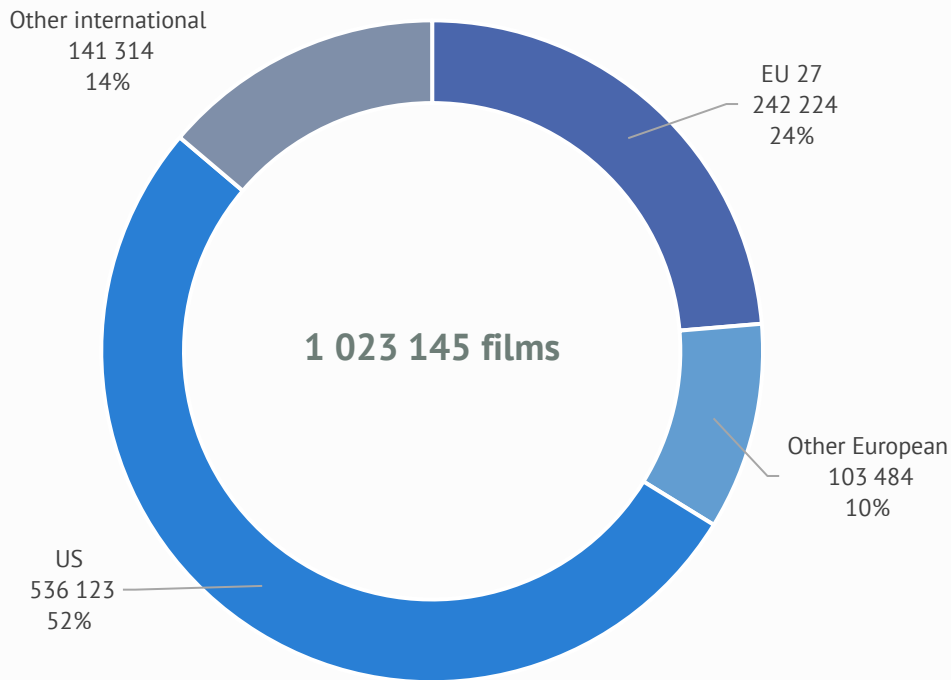
On average, an EU27 film title was available in 2.7 countries on TVOD and in 3.9 countries on SVOD

- ▶ 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.

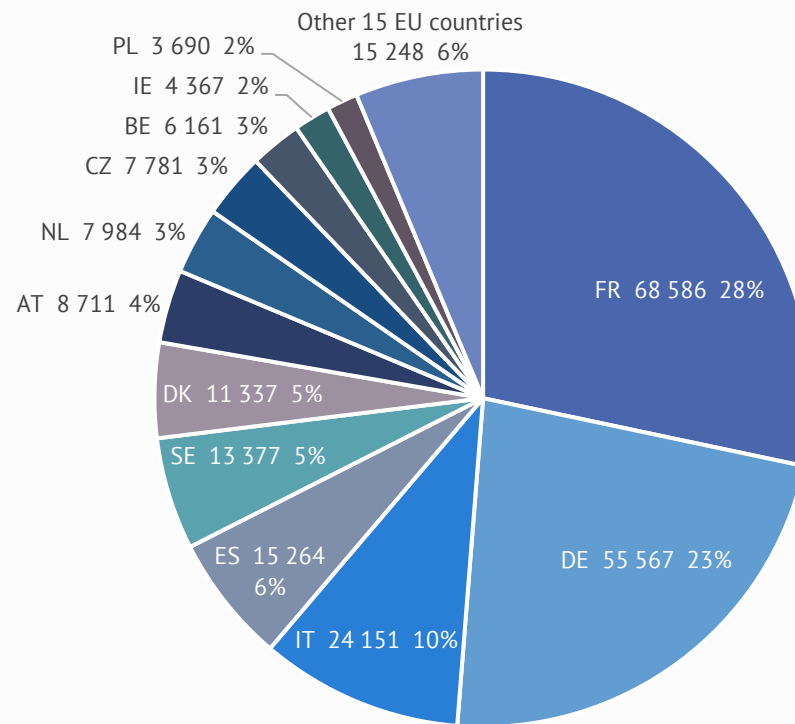
24% of all films in VOD catalogues (TVOD and SVOD) were of EU27 origin

- ▶ 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 films in 558 VOD catalogues



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



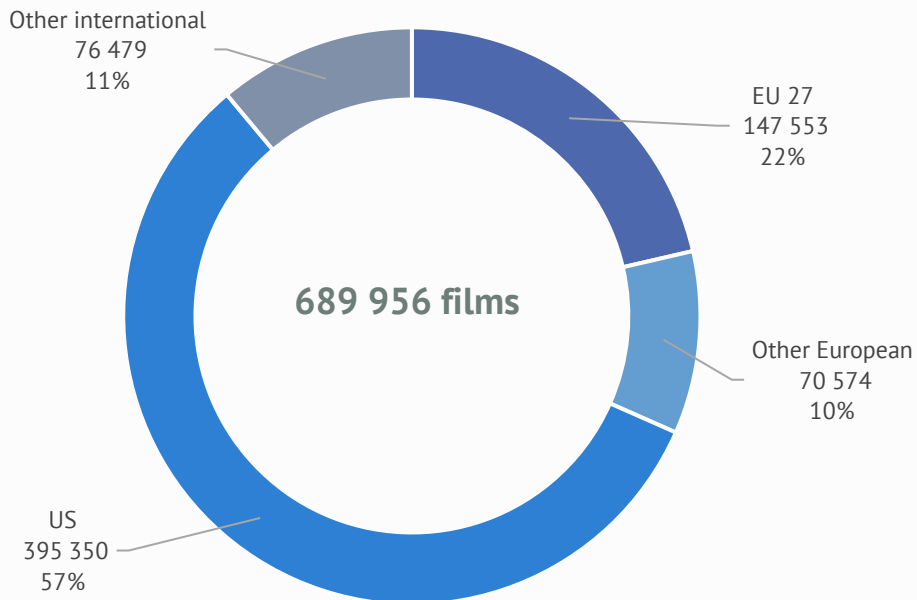
Source: JustWatch, Filmtoro, Chili, La Pantalla Digital, EUROVOD catalogue data

*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.

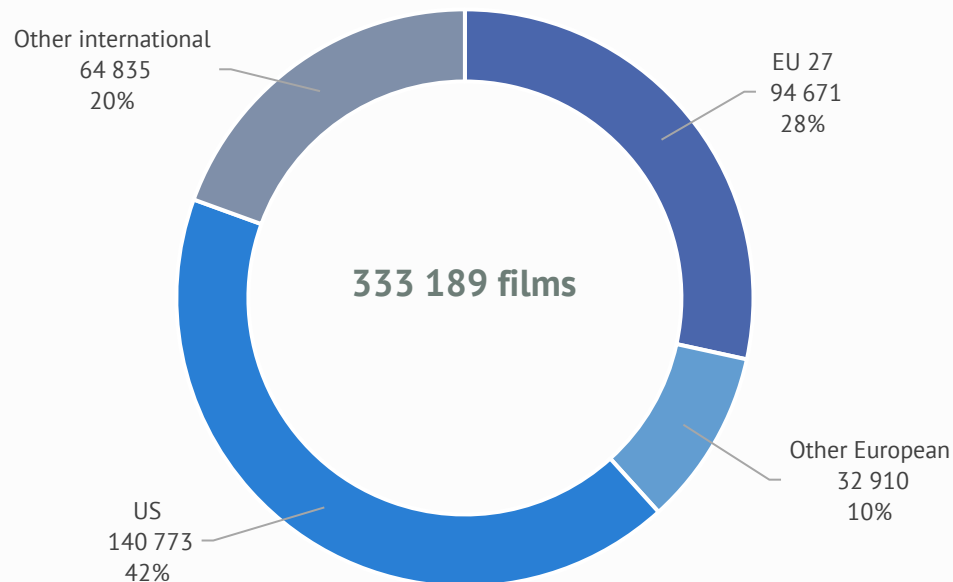
28% of all films on SVOD and 22% on TVOD are of EU27 origin

- ▶ 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



Origin of films in 420 SVOD catalogues



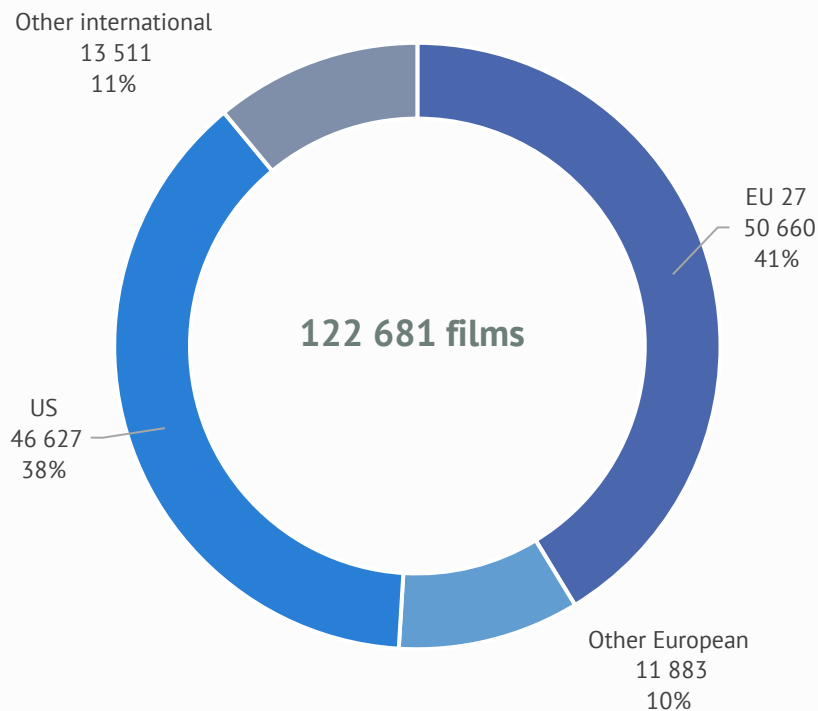
Source: JustWatch, Filmtoro, Chili, La Pantalla Digital, EUROVOD catalogue data

*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.

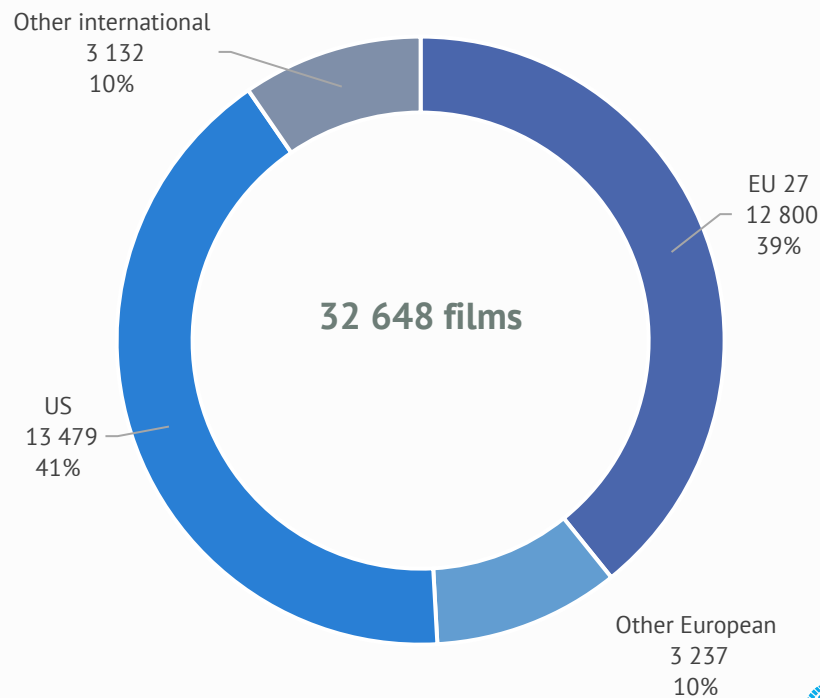
National services had a higher share of EU27 films

- ▶ **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



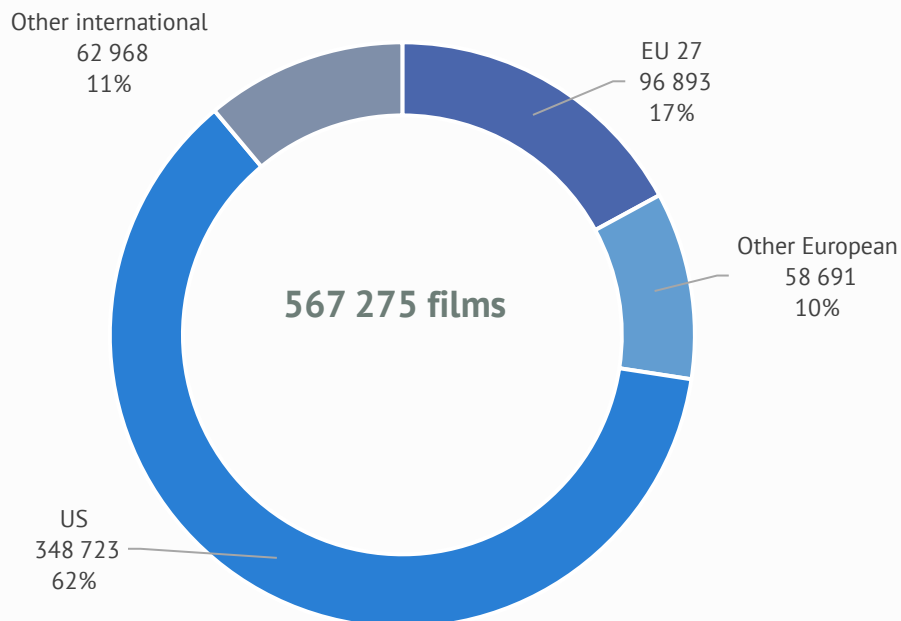
Origin of films in 39 national SVOD catalogues



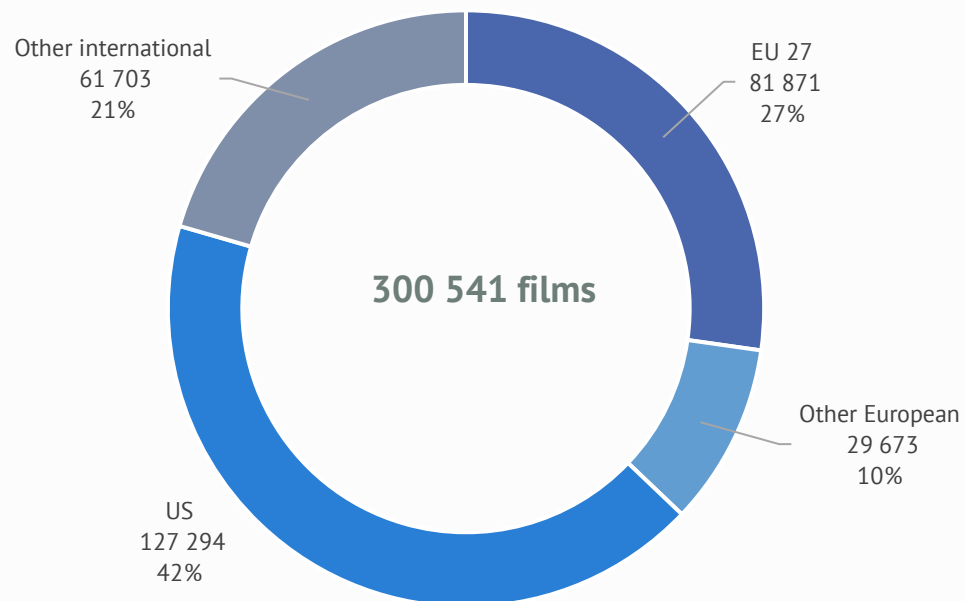
While multi-country services rely more on US films and less on EU27 films

- ▶ 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



Origin of films in 381 multi-country SVOD catalogues

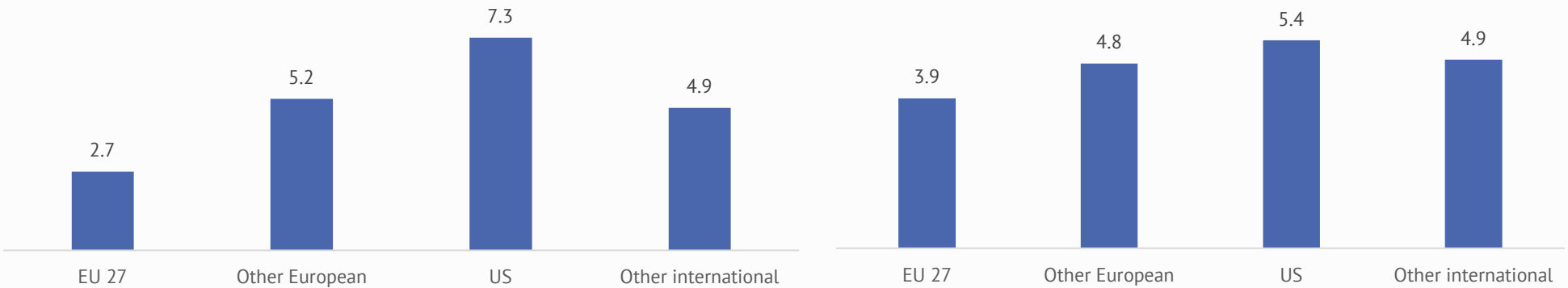


Lower percentages of EU27 films is explained by a lesser title circulation in countries

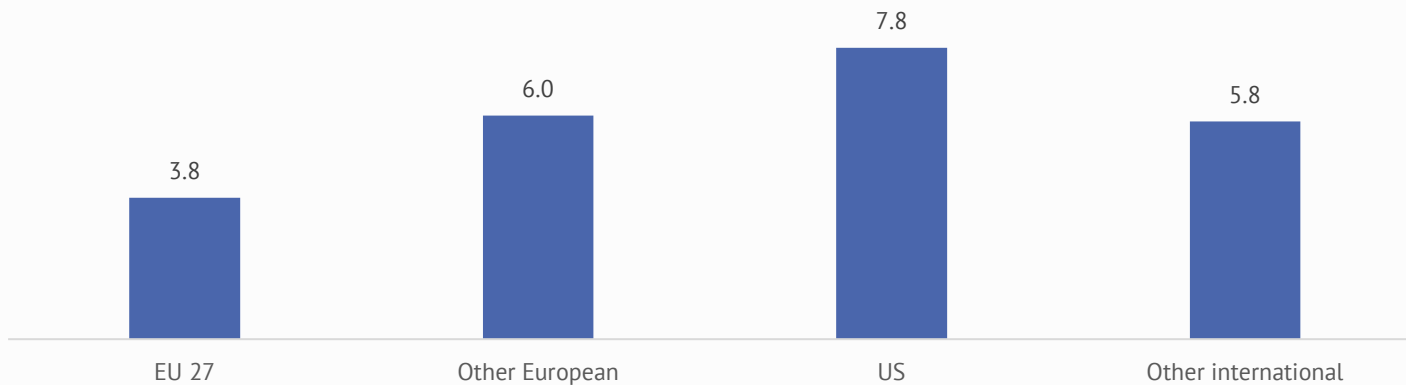
- ▶ The lower share of EU films in total compared to their share of unique films is explained by their lower circulation in countries, with an average of 2.7 countries on TVOD and 3.9 on SVOD.
- ▶ US films and films from other regions and other European countries travelled best, crossing borders more easily than EU27 films.

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

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



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

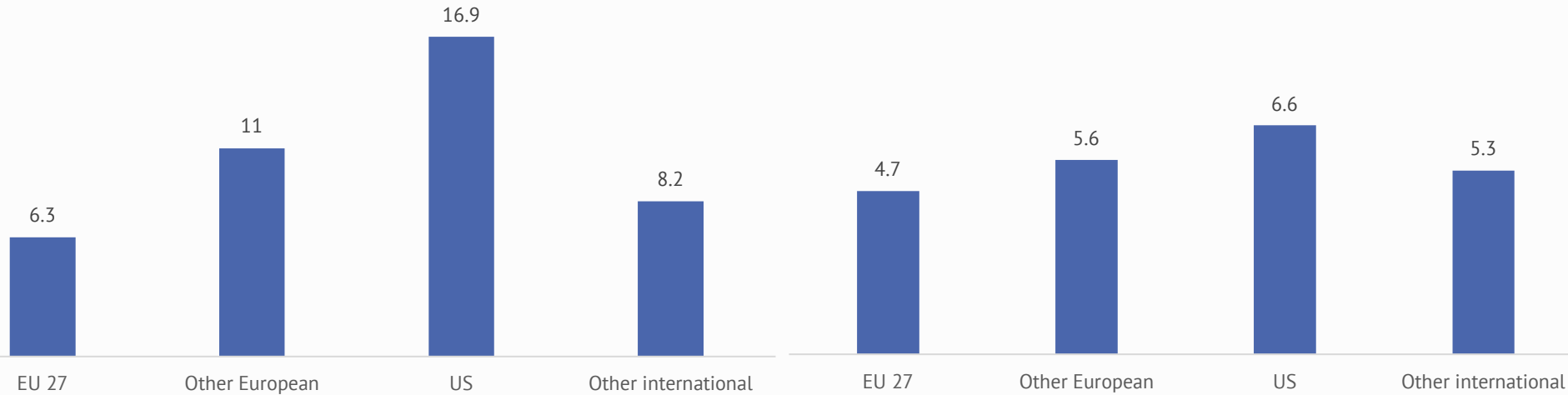


And on services, EU27 titles tend to circulate less than titles of other regions

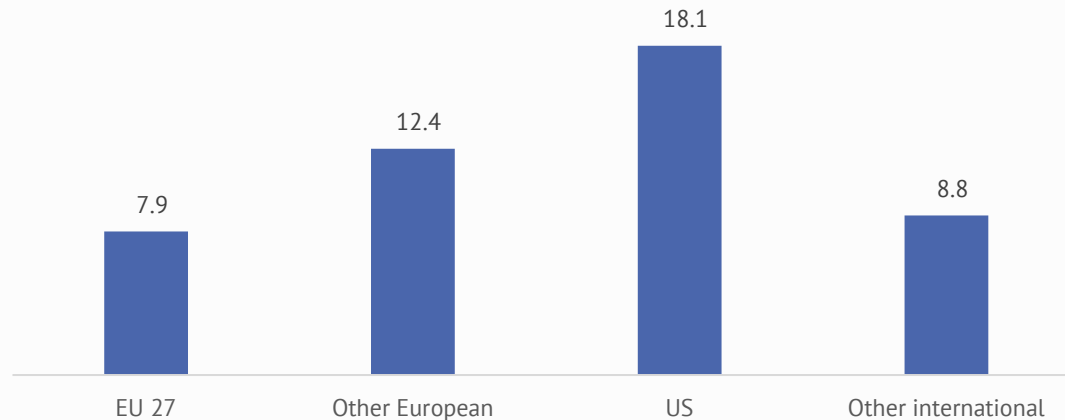
- ▶ On average, EU27 films were present in 6.3 TVOD catalogues and 4.7 SVOD catalogues, less than films of all other regions.
- ▶ US films circulated best also on services, followed by other European films and films of other regions for all VOD services.

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

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



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



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



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

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.

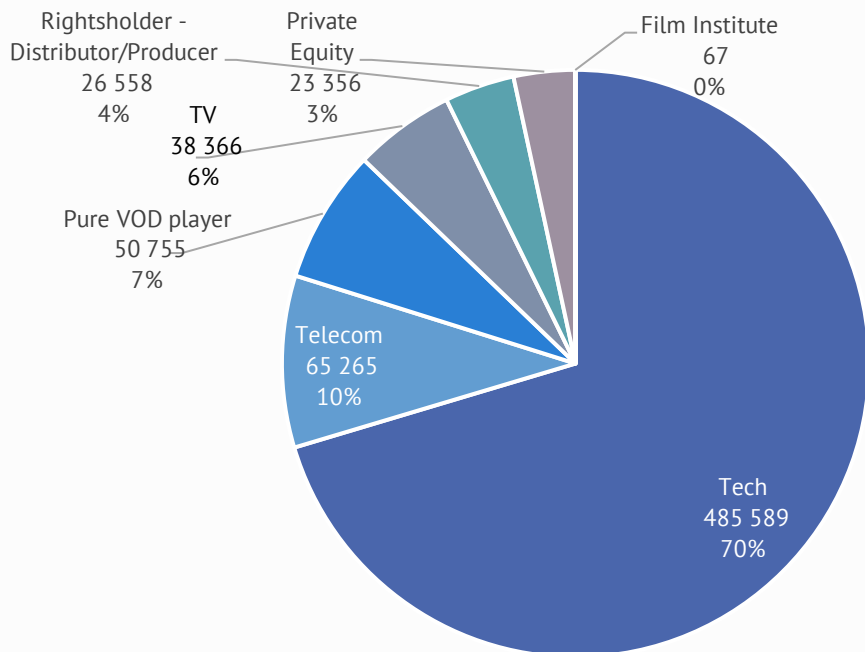
Services owned by EU players had the highest share of EU films while services owned by global players offered the largest number of films

- ▶ 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.

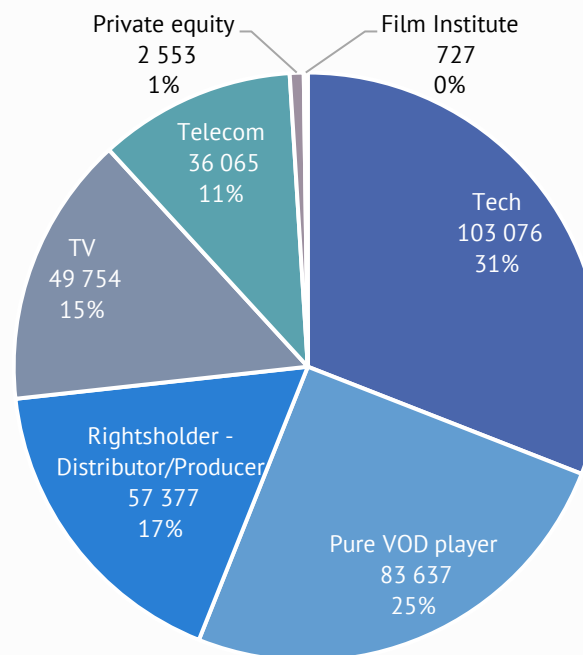
Services owned by tech players had the highest number of films in their catalogues

▶ 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



SVOD – Number of films by core business of service owner



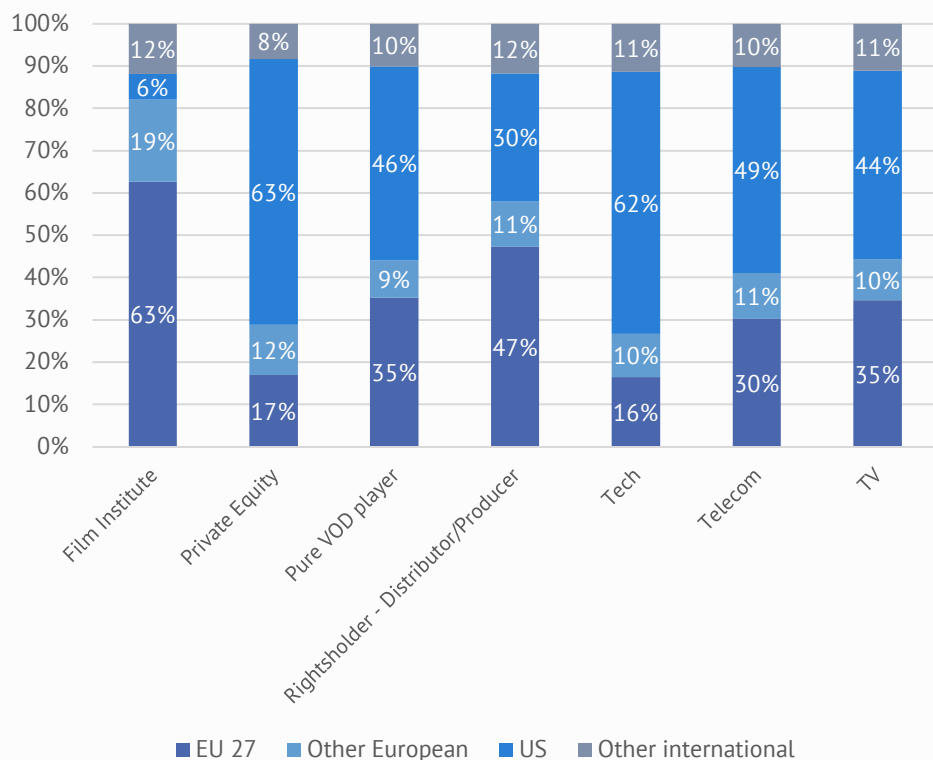
Core business	Number of TVOD catalogues	Average number of films/catalogue	Number of SVOD catalogues	Average number of films/catalogue
Film Institute	1	67	1	727
Private Equity	3	7 785	5	511
Pure VOD player	30	1 692	70	1 195
Rightsholder - Distributor/Producer	17	1 562	183	314
Tech	66	7 357	77	1 339
Telecom	12	5 439	31	1 163
TV	9	4 263	53	939

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

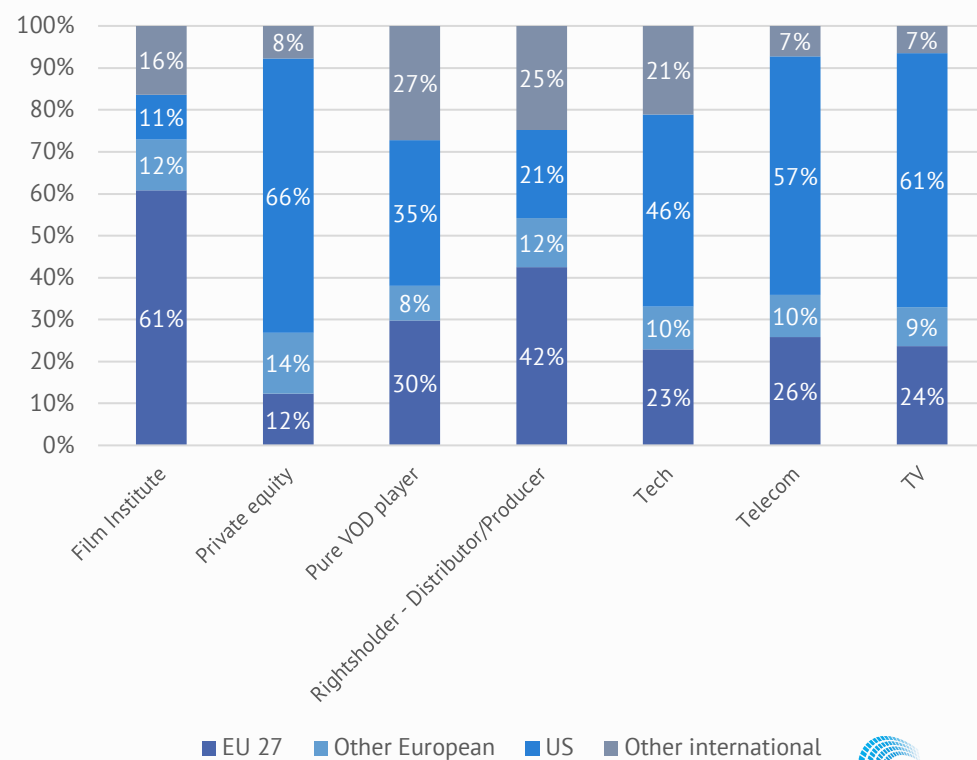
Sharp differences in the composition of catalogues by core business of service owners

- ▶ 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



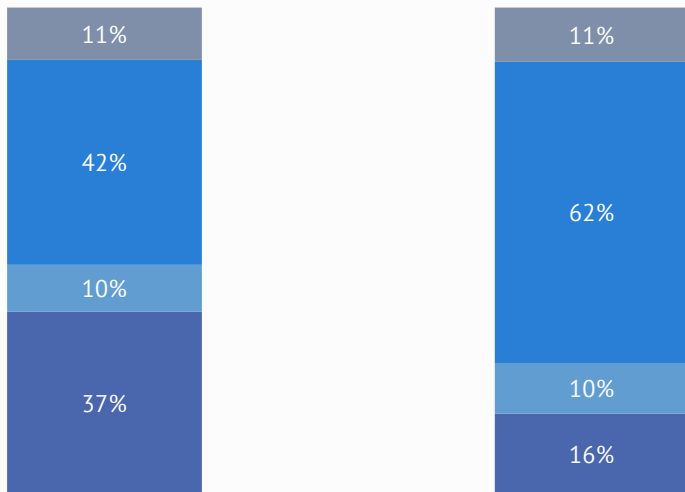
SVOD – Share of films by core business of service owner



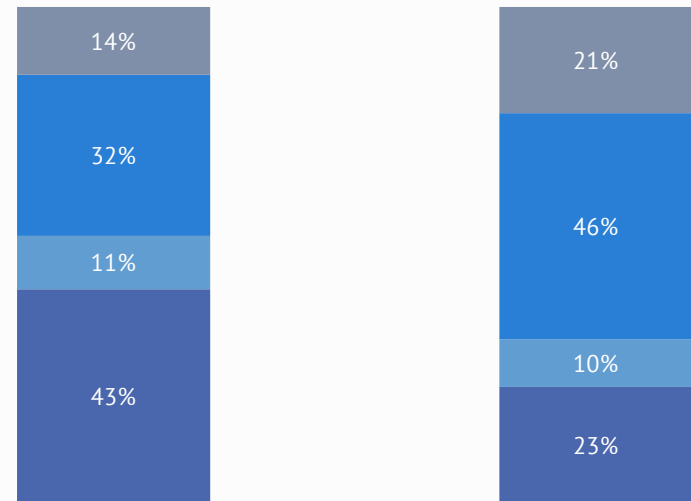
Higher share of EU27 films for EU27 owned services...

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



SVOD – Share of films by origin of service owner



■ EU 27 ■ Other European ■ US ■ Other international

■ EU 27 ■ Other European ■ US ■ Other international

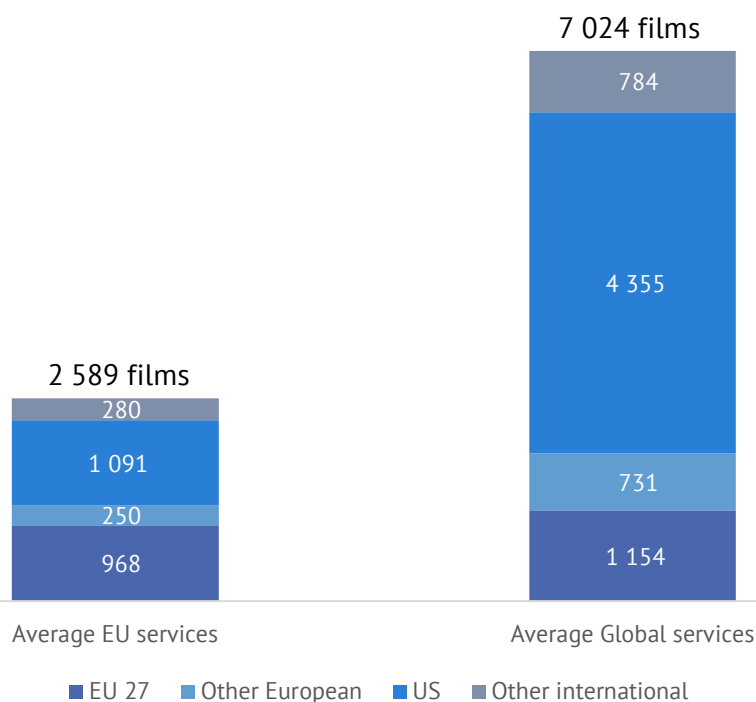
Origin of service owner	Number of TVOD catalogues	Average number of films/catalogue	Number of SVOD catalogues	Average number of films/catalogue
EU	63	2 589	88	976
Global services	75	7 024	332	745

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

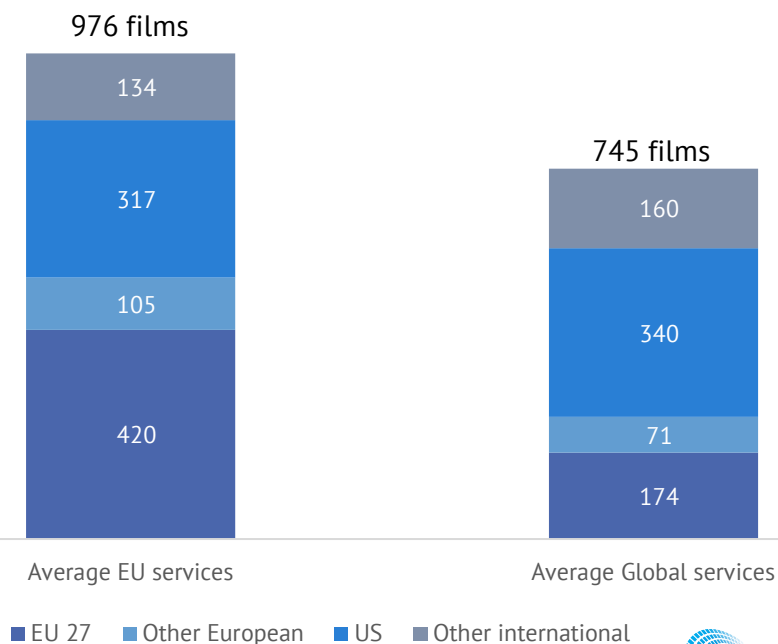
But the total offer of EU27 films was higher for global services

- ▶ 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



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



B.5 – Composition of catalogues by national and EU27 non-national films

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.

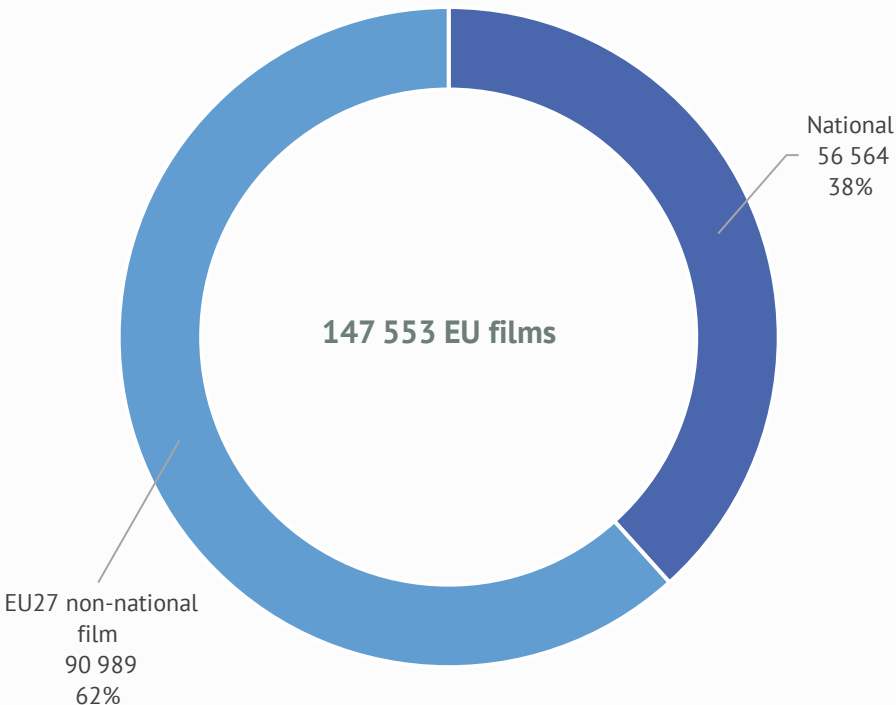
Both on TVOD and SVOD, national services had a much higher share of national films than multi-country services, which relied more on EU27 non-national films for their EU27 film offering

- ▶ 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.

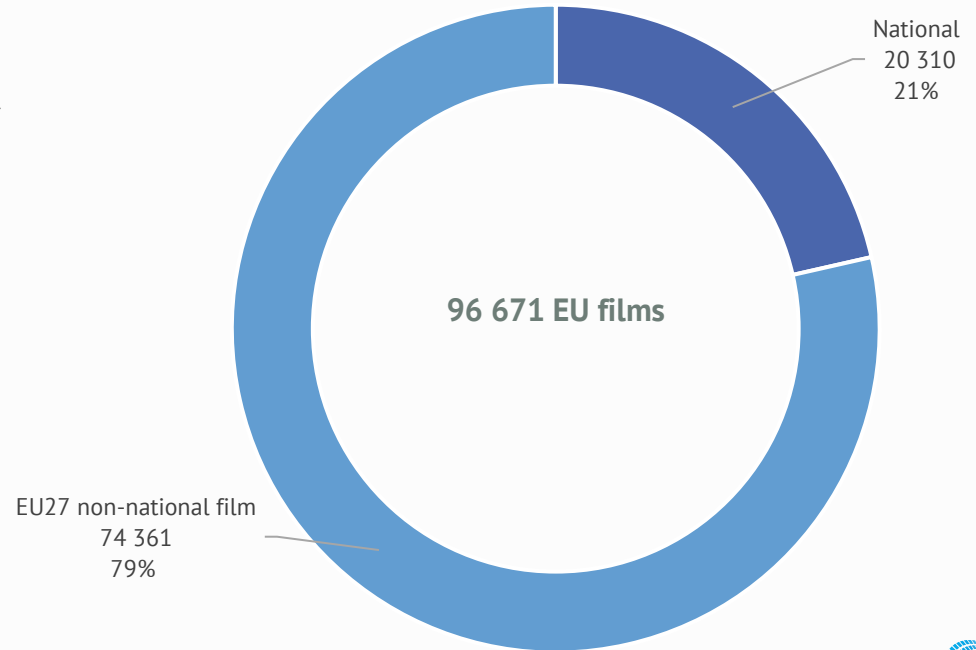
What was the split between national and EU27 non-national films?

- ▶ 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



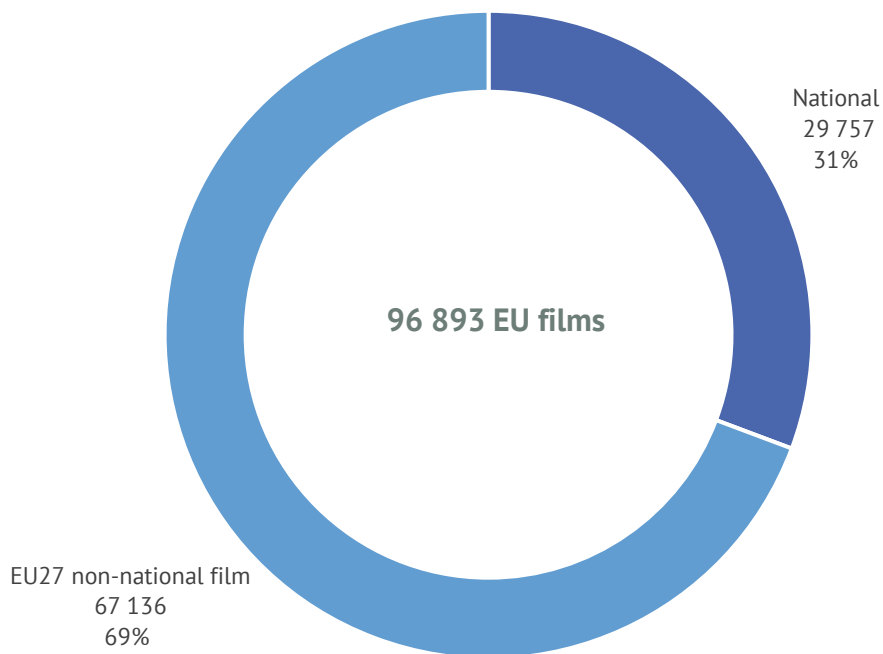
SVOD - Split of national and EU27 non-national films



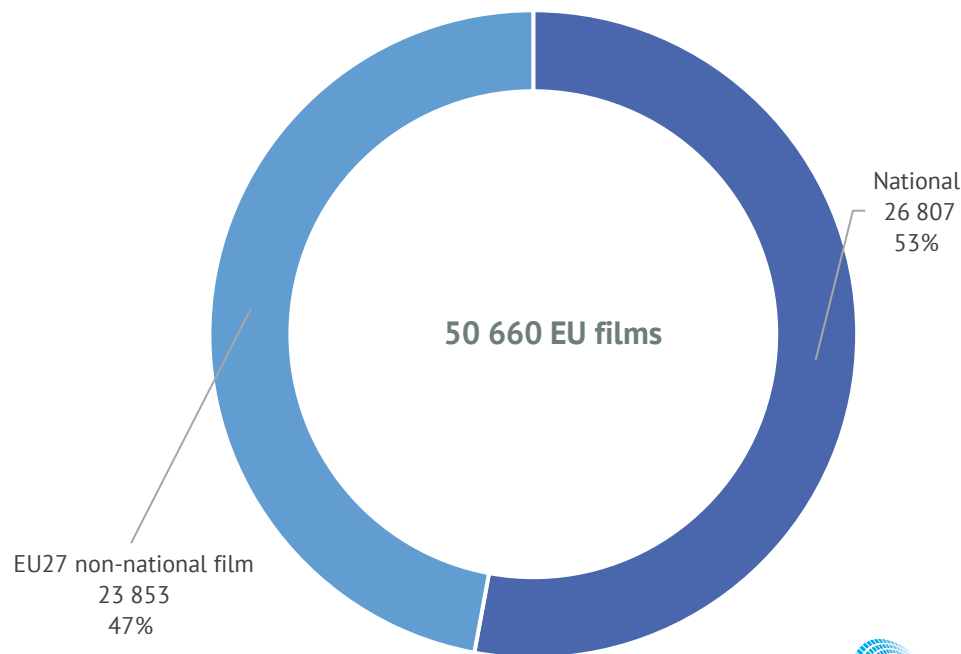
Differences between multi-country and national catalogues

- ▶ 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.

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



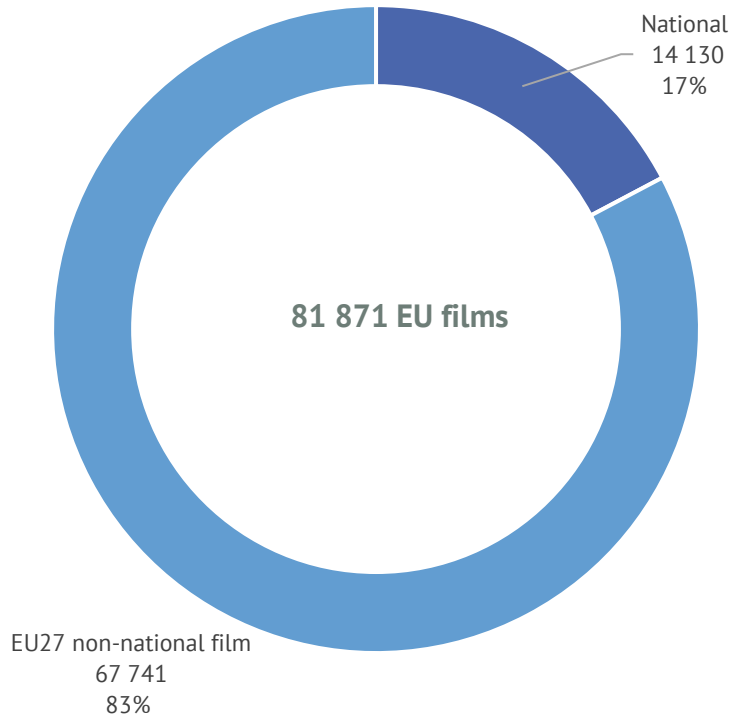
TVOD national services
- Split of national and EU27 non-national films



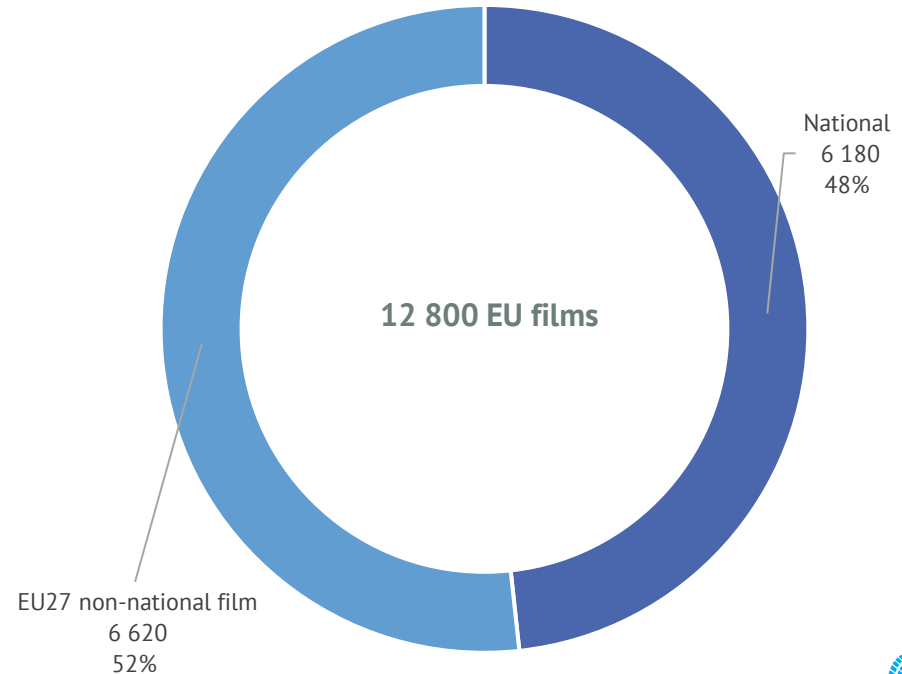
What is the split between national and EU27 non-national films?

- ▶ 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.

SVOD multi-country services –
Split of national and EU27 non-national films



SVOD national services –
Split of national and EU27 non-national films



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 on average 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

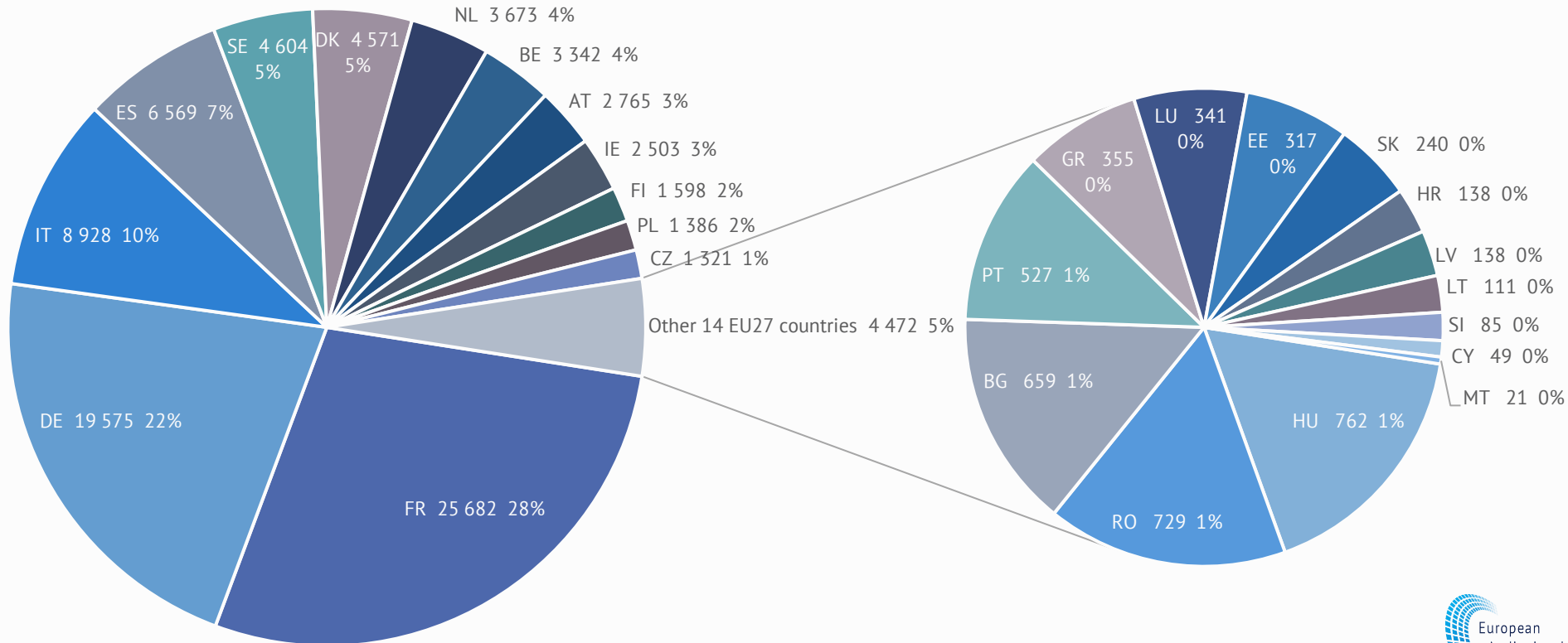
As a rule of thumb, the lower the volume of titles, the better the average country circulation.

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.

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

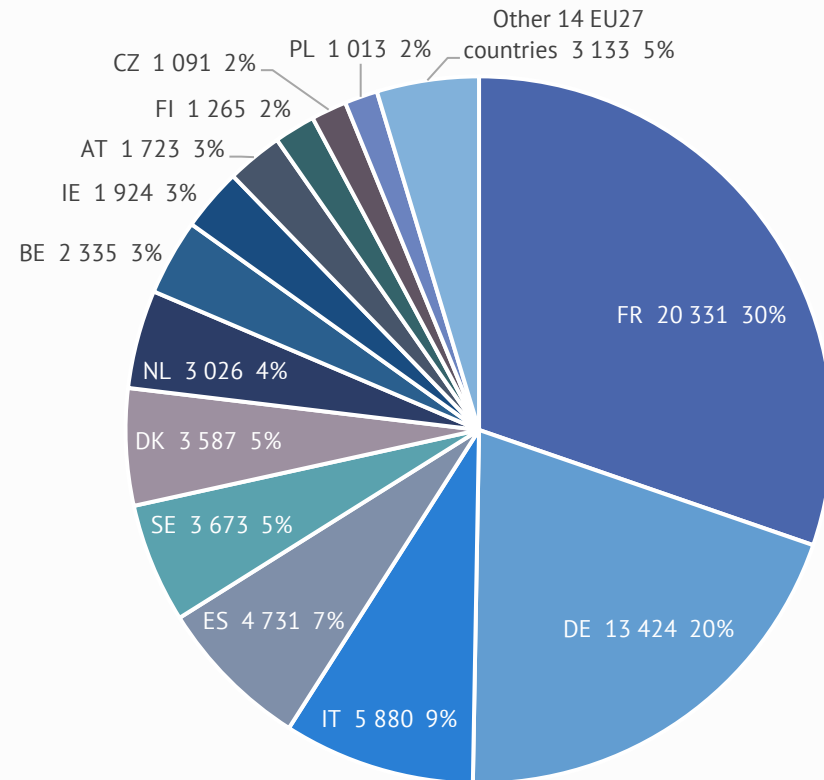


Source: JustWatch, Filmtoro, Chili, La Pantalla Digital, EUROVOD catalogue data

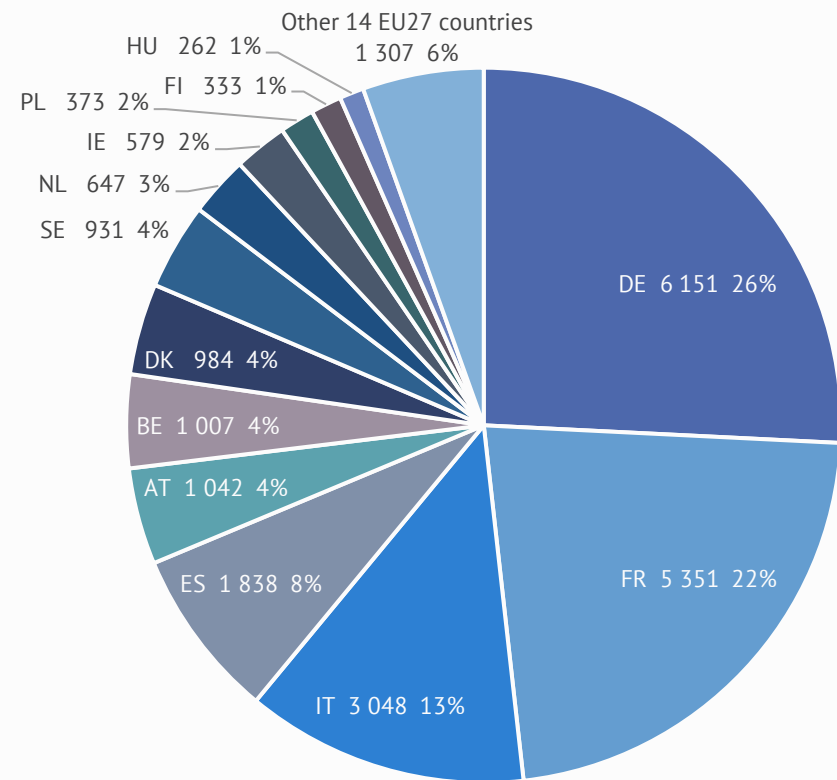
National and multi-country TVOD services had similar share of EU27 non-national films by country of origin

- ▶ 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.

Export of EU films in 103 multi-country TVOD catalogues



Export of EU films in 35 national TVOD catalogues

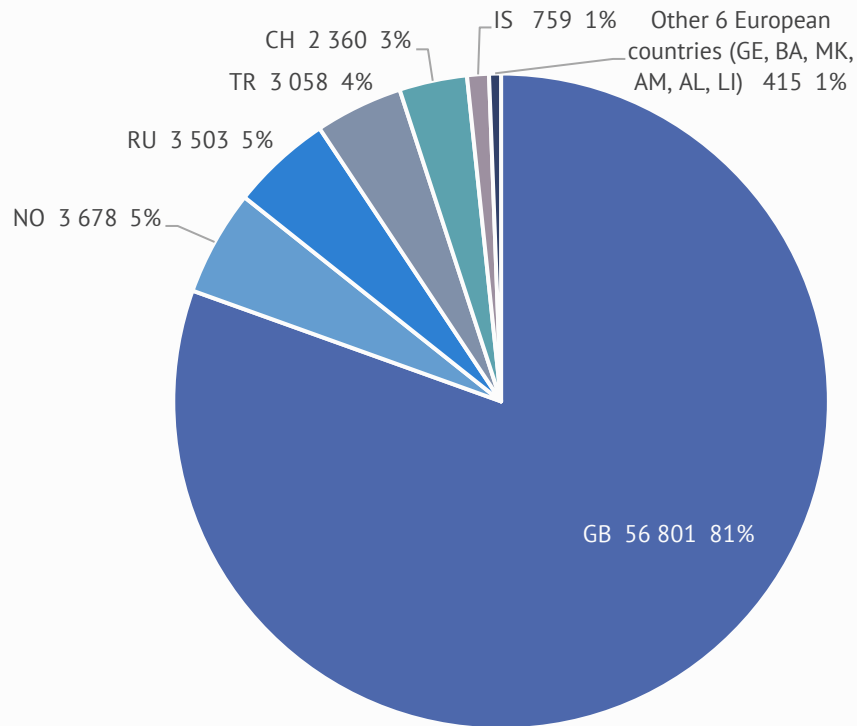


Source: JustWatch, Filmtoro, Chili, La Pantalla Digital, EUROVOD catalogue data

Which other European countries exported the most films on TVOD?

- ▶ **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.

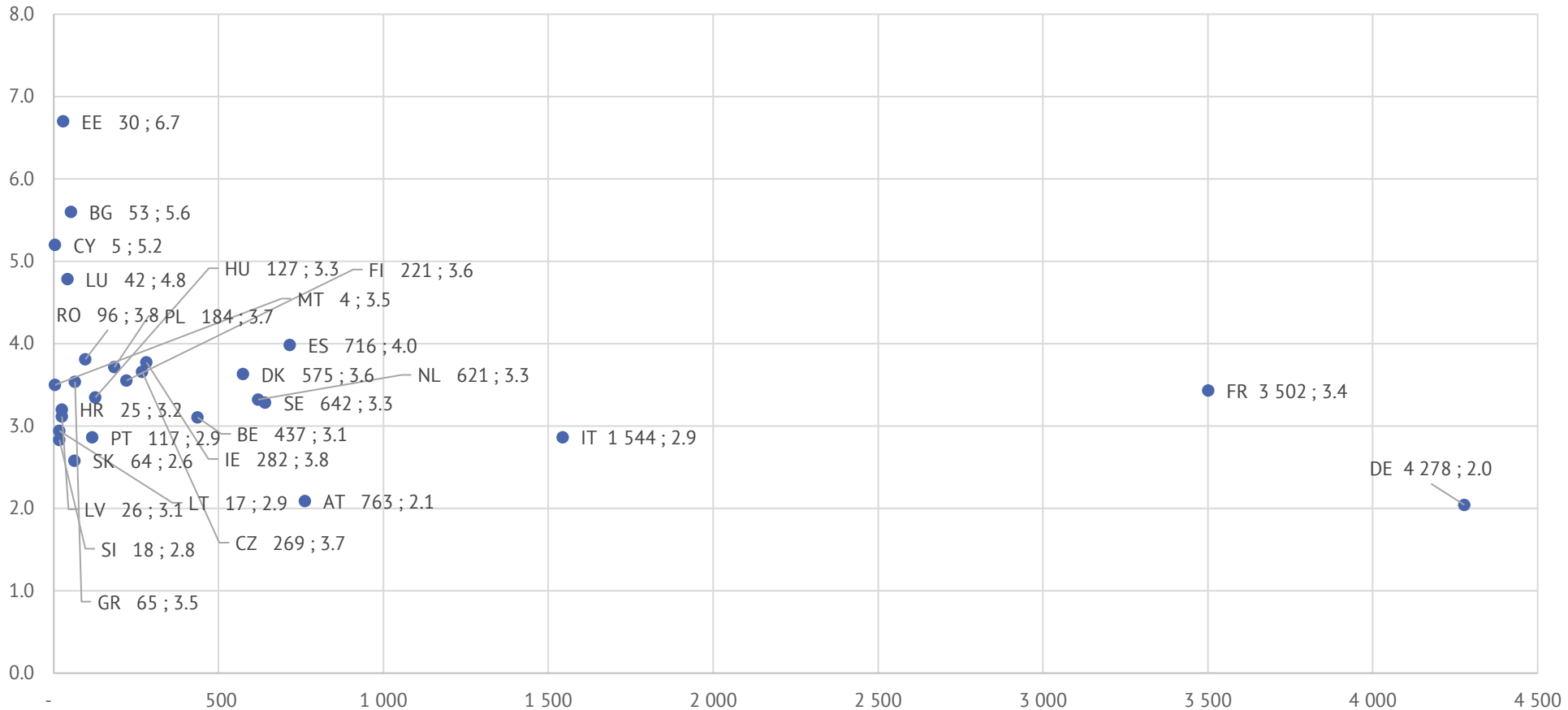
TVOD – Number of other European films by country of origin



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.

Top 20 EU film titles exported on TVOD services

- ▶ 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).

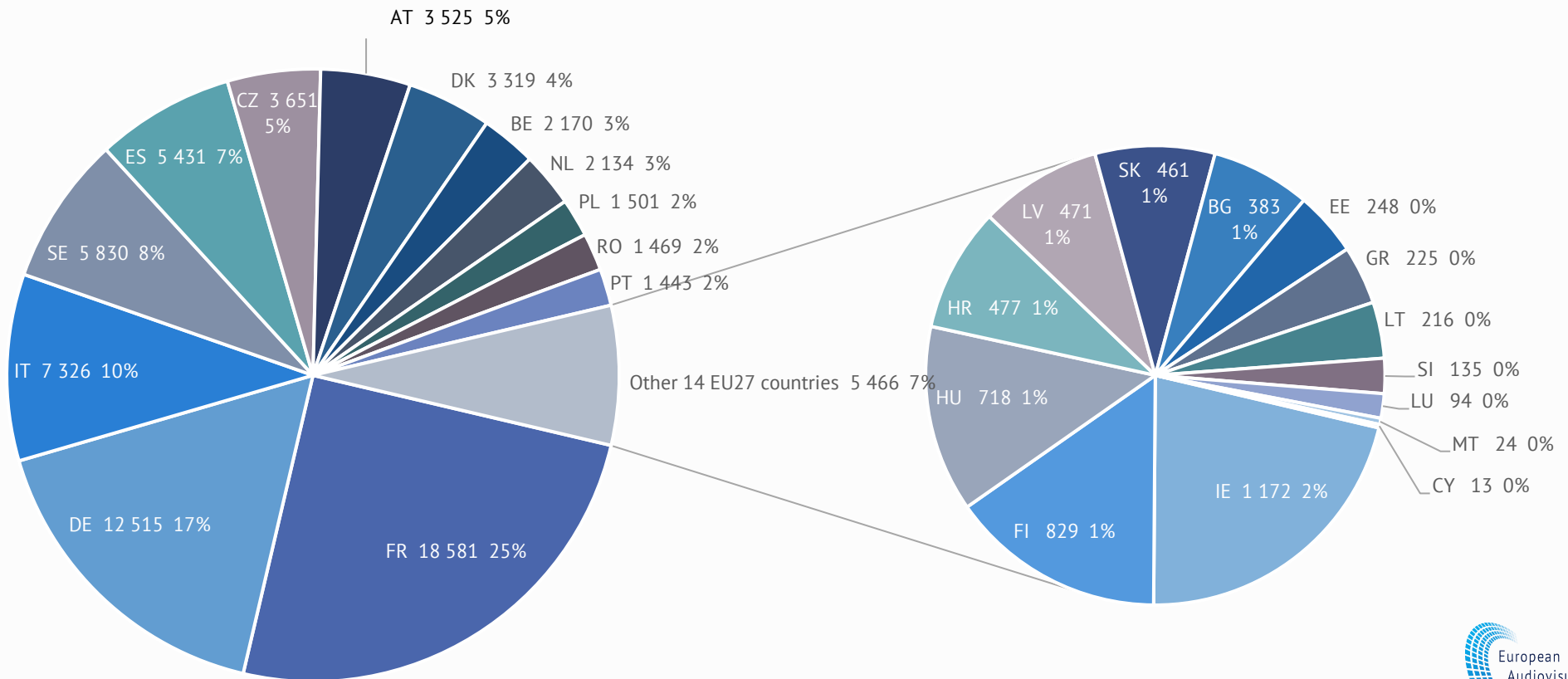
Top 20 EU27 exported film titles in 138 TVOD catalogues

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

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.

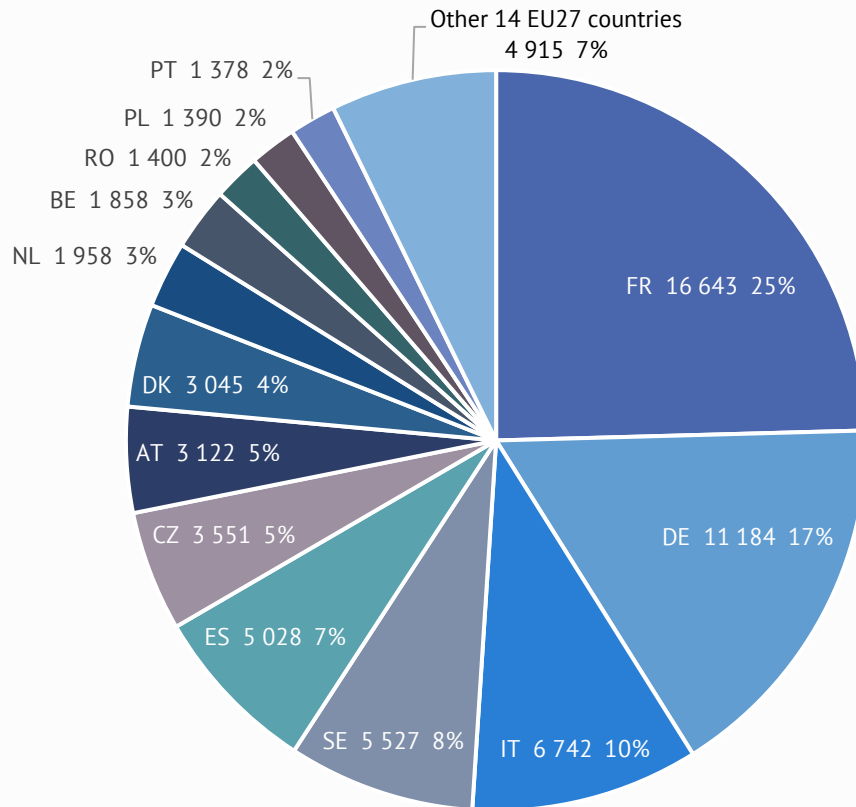
SVOD – Number of EU films exported outside of their national market by country of origin



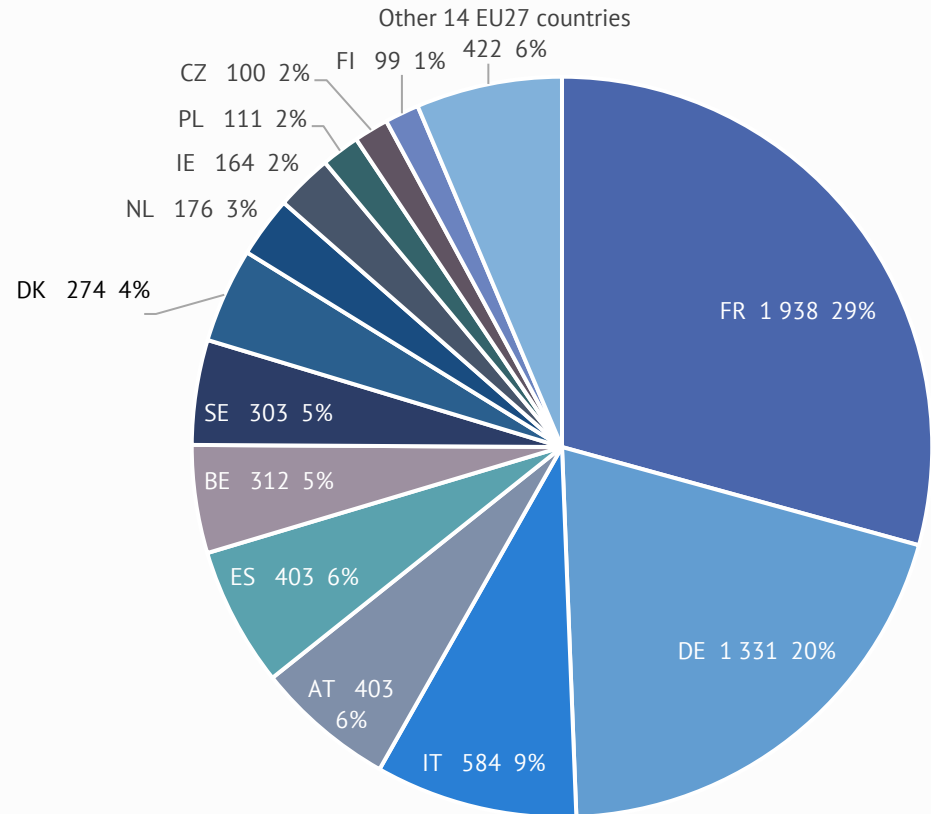
Comparable proportions of films on SVOD and on TVOD for multi-country and national

- ▶ 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



Export of EU films in 39 national SVOD catalogues

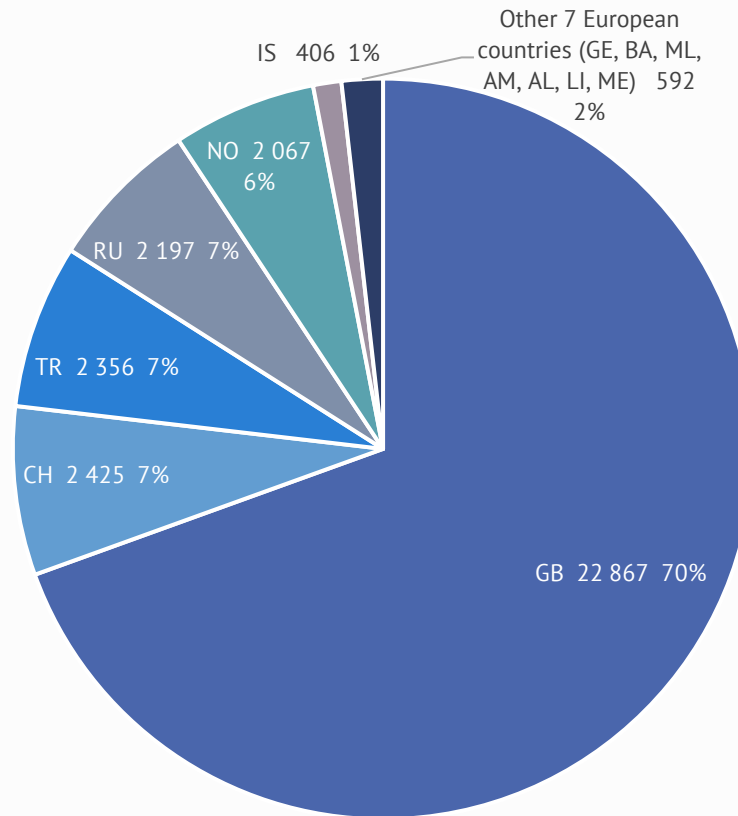


Source: JustWatch, Filmtoro, Chili, La Pantalla Digital, EUROVOD catalogue data

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.

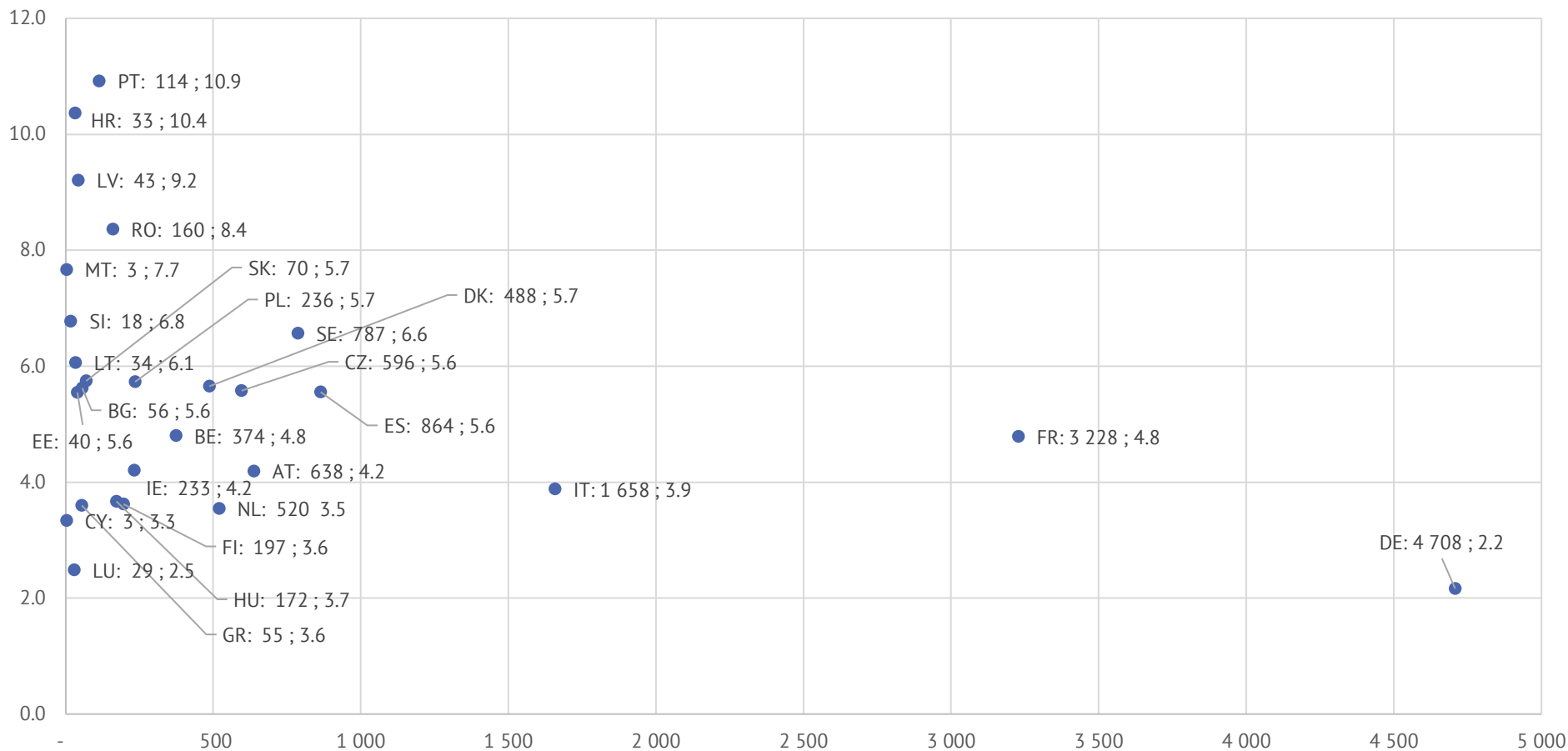
SVOD – Number of Other European films by country of origin



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

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.

Top 20 EU exported film titles in 185 SVOD catalogues

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

Source: JustWatch, Filmtoro, 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.

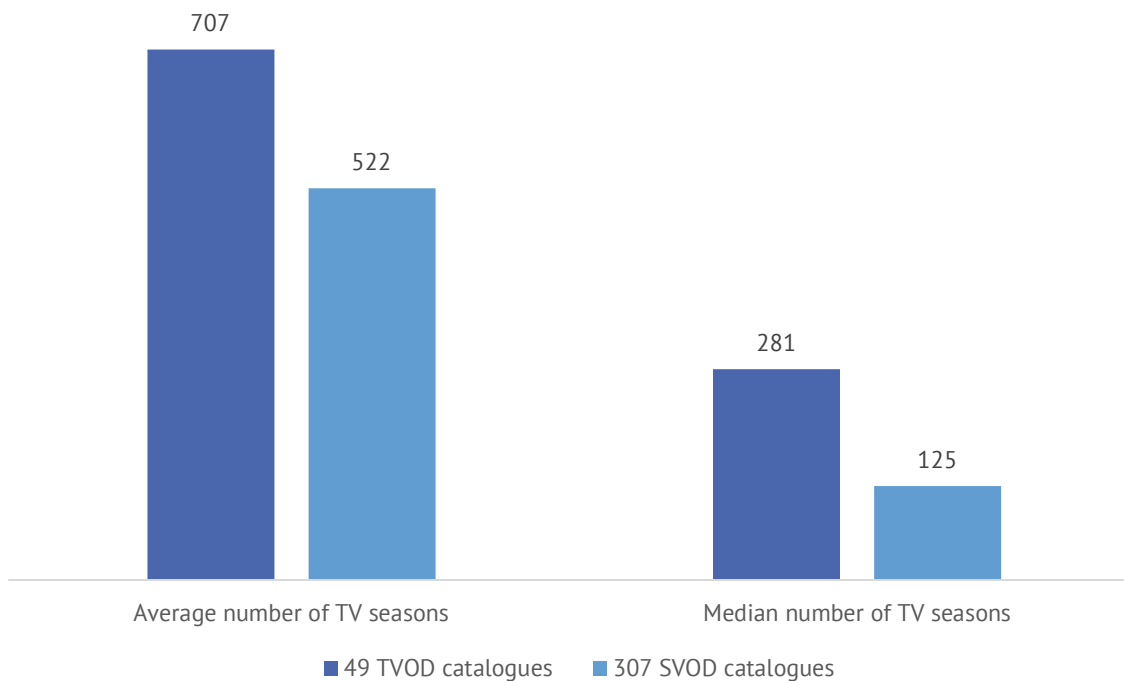
The bulk of TV series' first seasons available on SVOD were less than 5 years old

- ▶ 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.

Differences between TVOD and SVOD services in the number of TV seasons

- ▶ 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.

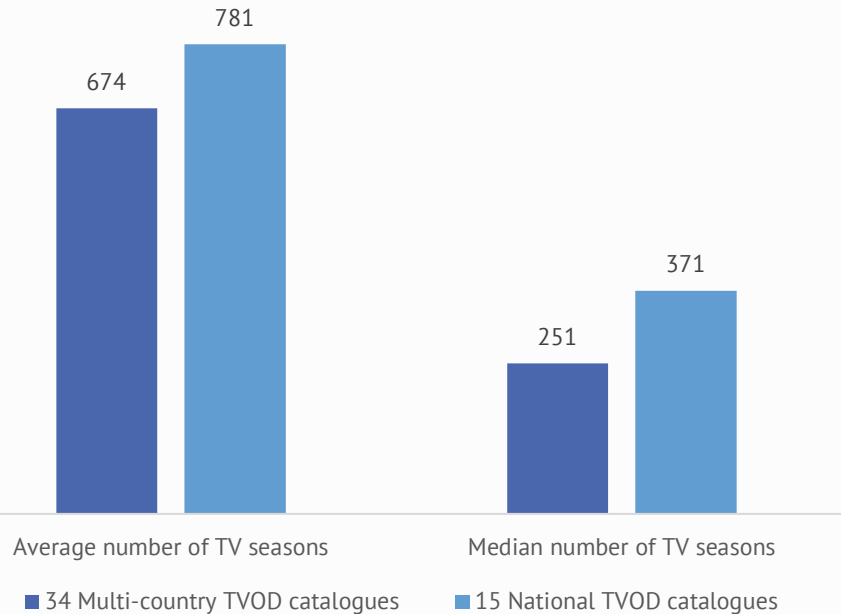
Average and Median size of catalogues by business model, *in number of TV seasons*



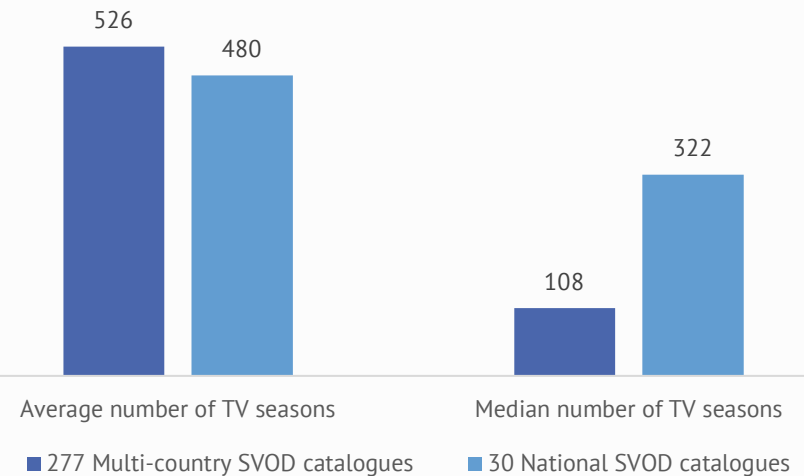
Also, strong differences between national and multi-country services

- ▶ 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



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

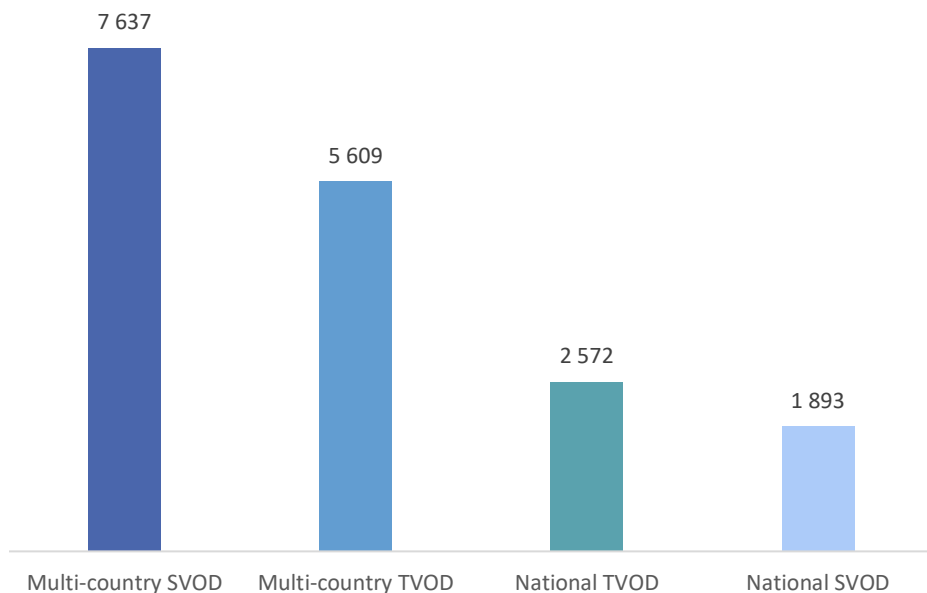


Source: JustWatch data

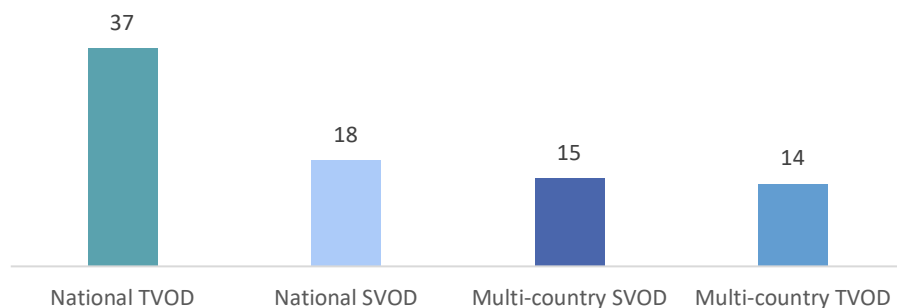
Huge disparities in absolute numbers of TV seasons for TVOD and SVOD catalogues

- ▶ 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.

Maximum number of seasons in catalogue, by business model



Minimum number of seasons in catalogue, by business model

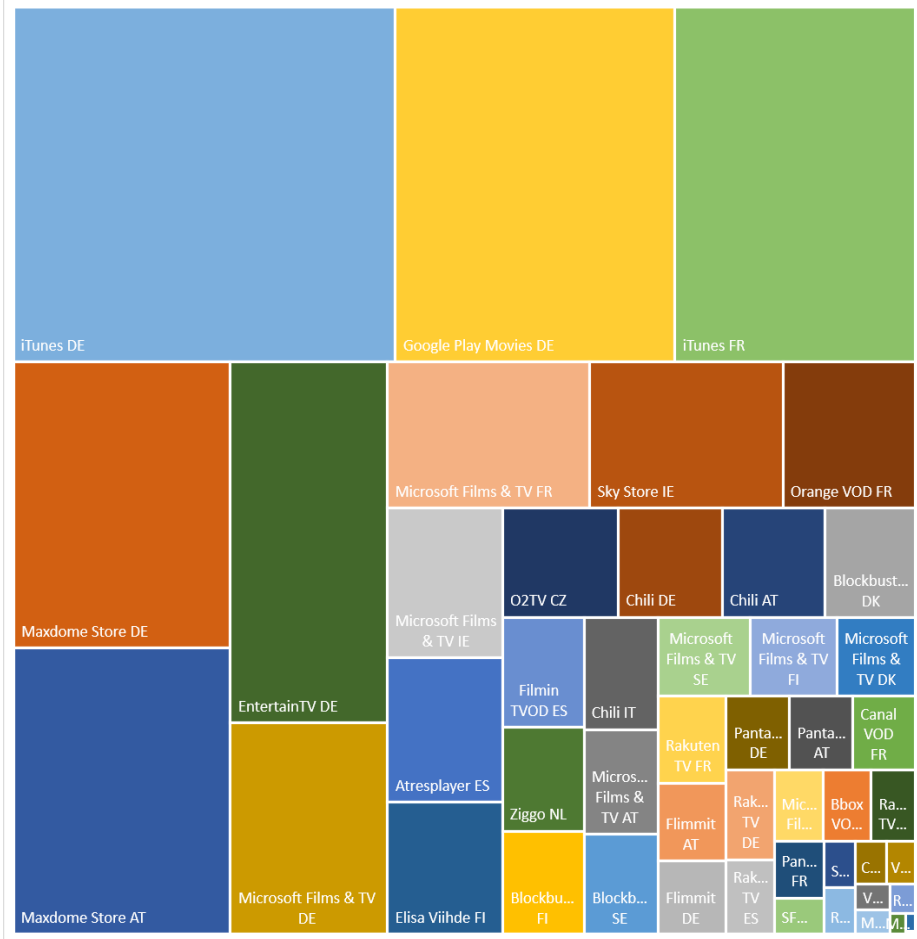


Source: JustWatch data

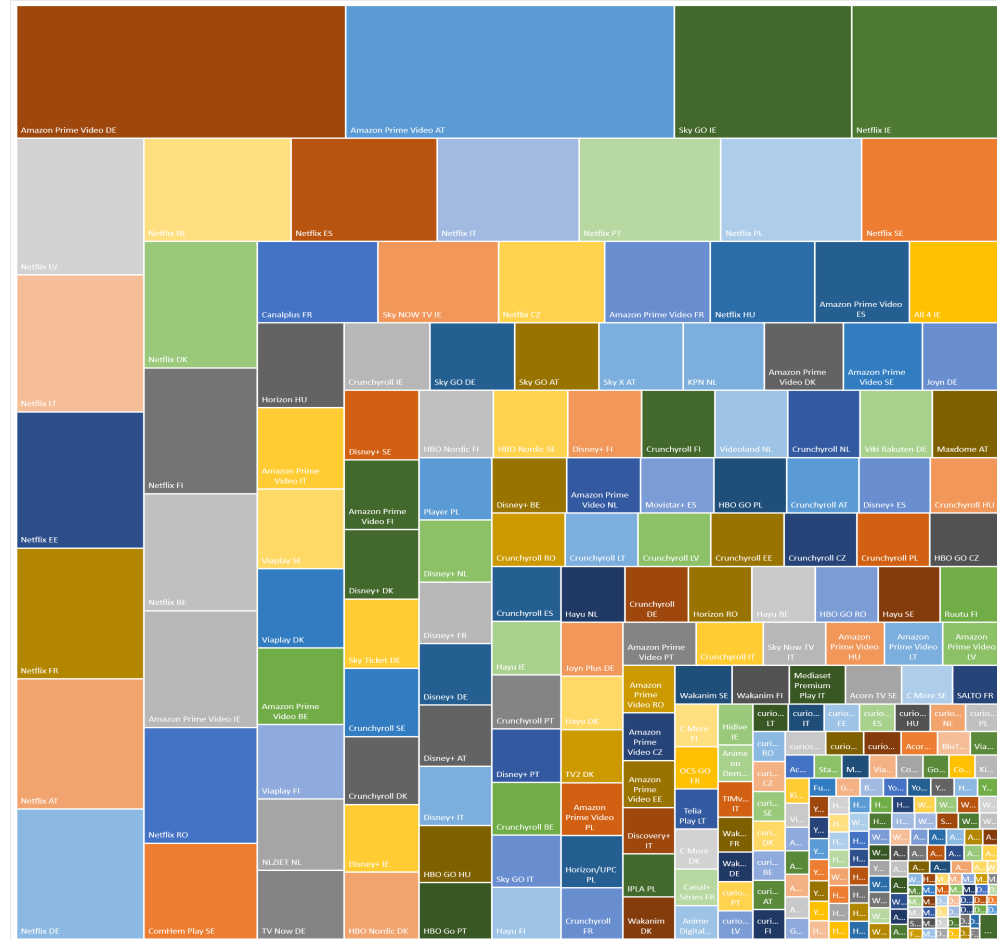
Extreme disparities in the size of VOD catalogues

- 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



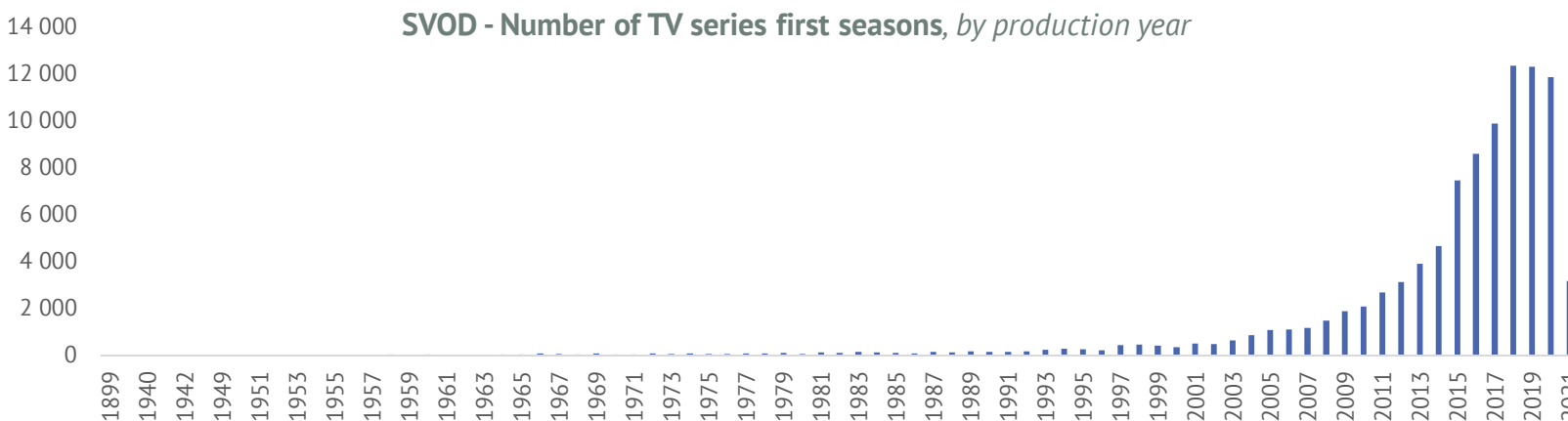
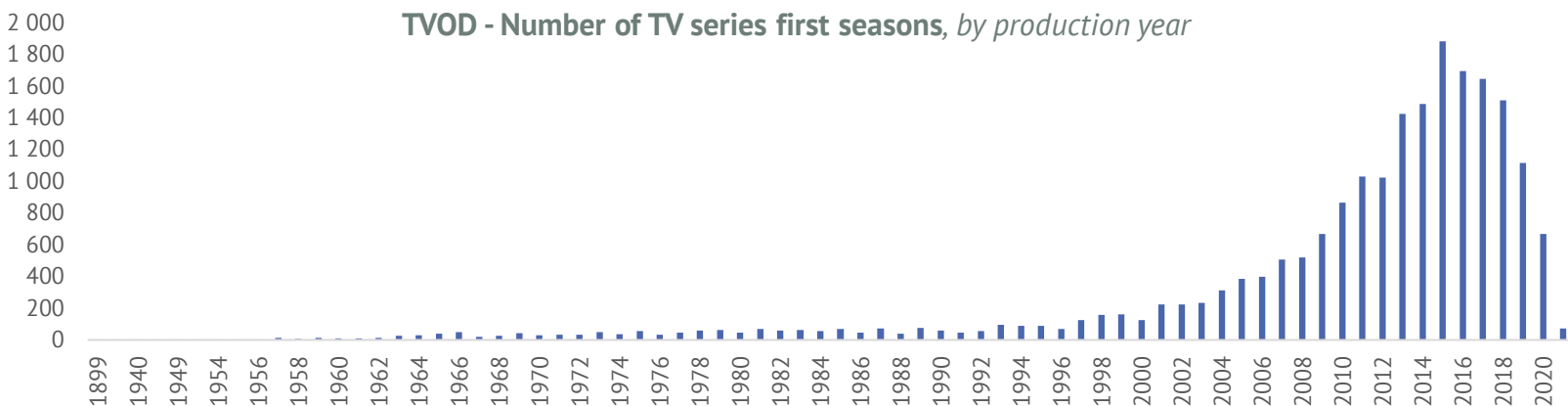
Size of 307 SVOD film catalogues, in number of films



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%) .

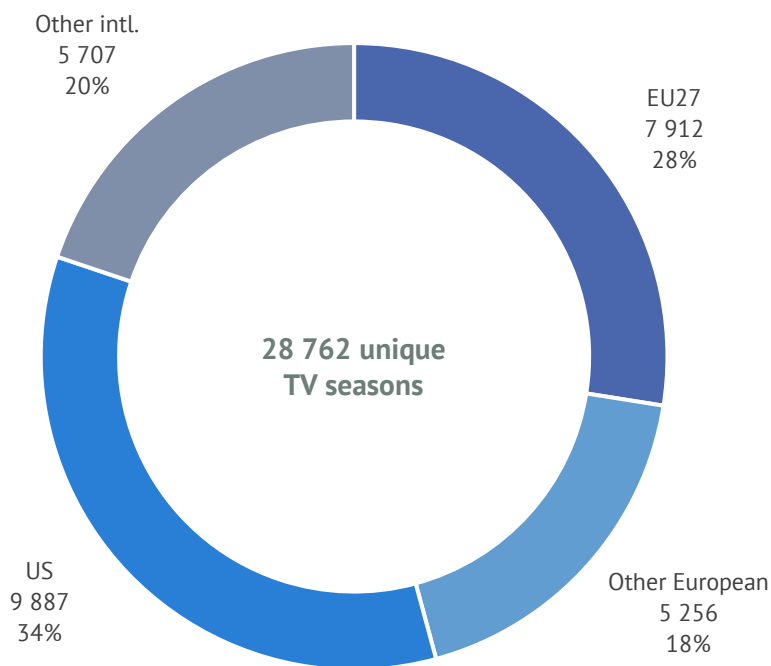
Dominance of British content in Other European TV seasons

- ▶ 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.

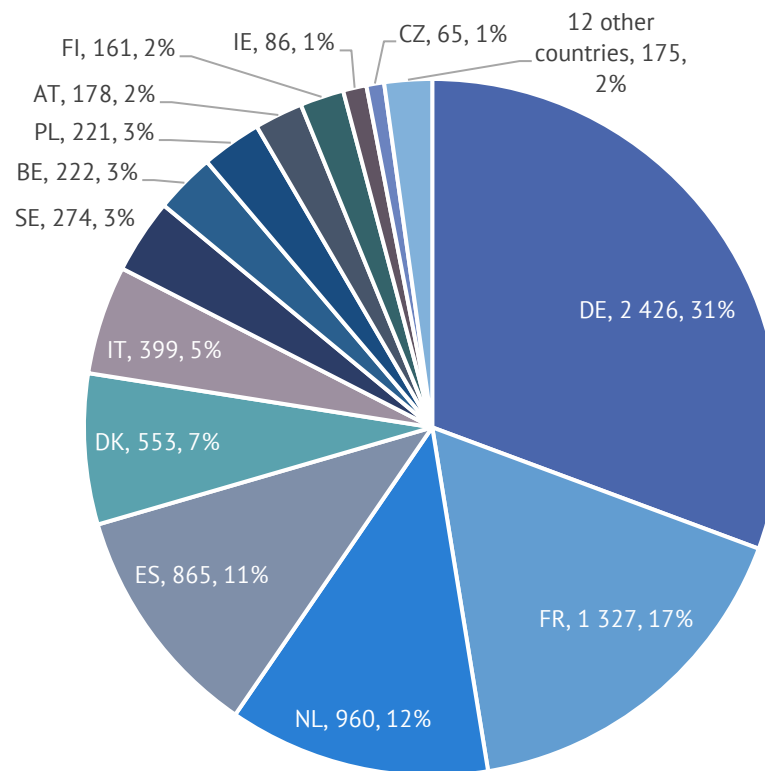
Over 28 000 unique TV seasons available in VOD catalogues, 28% from EU27

- ▶ 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



Unique EU27 seasons in VOD catalogues, by country of origin

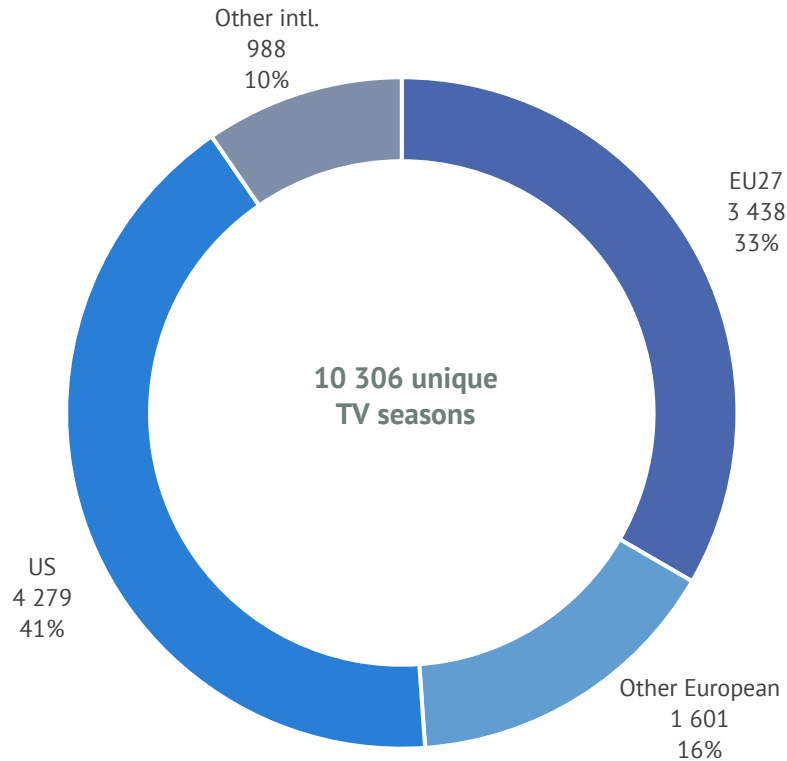


Source: JustWatch data

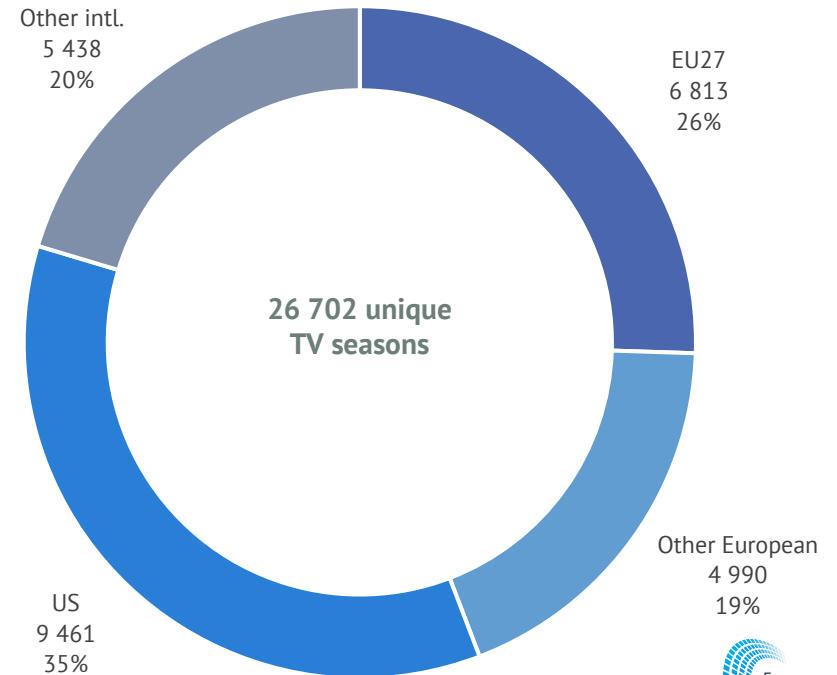
A larger choice of unique seasons on SVOD, biggest EU27 share on TVOD

- ▶ 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



Unique TV seasons in SVOD catalogues, by region of origin

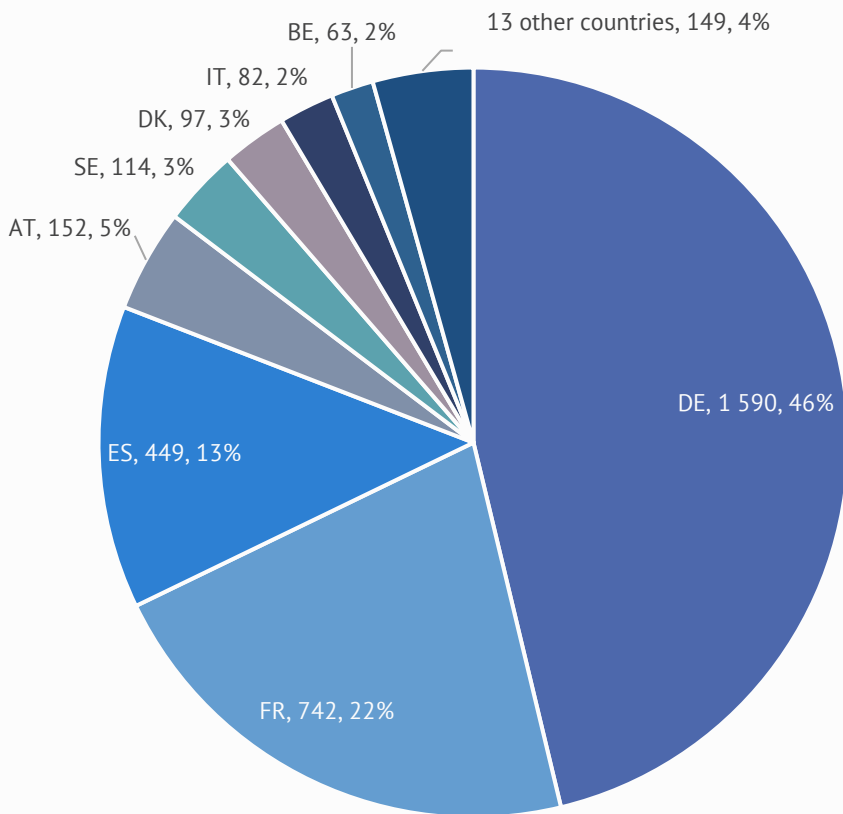


Source: JustWatch data

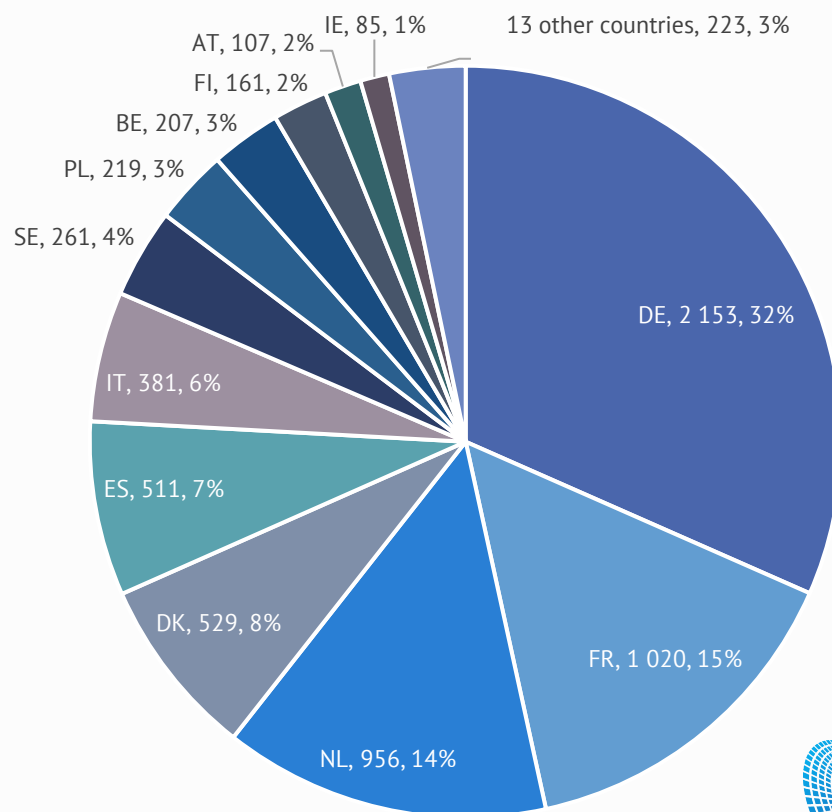
Origin of unique EU27 content by business model: more balanced on SVOD

- ▶ 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.

Origin of unique EU27 TV seasons in TVOD catalogues



Origin of unique EU27 TV seasons in SVOD catalogues



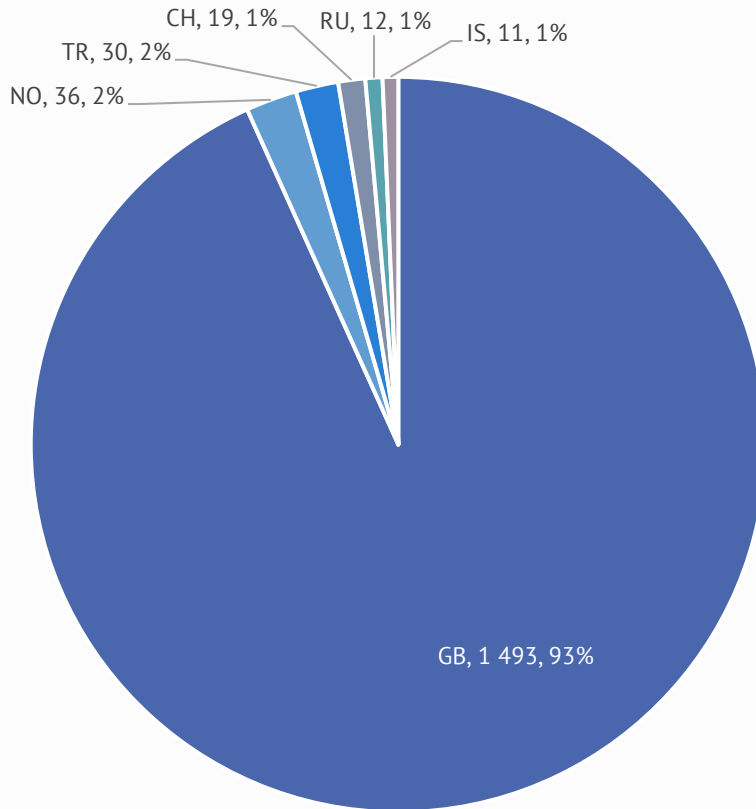
(*) Also partly due to the weight of German and Austrian services in the sample.

Source: JustWatch data

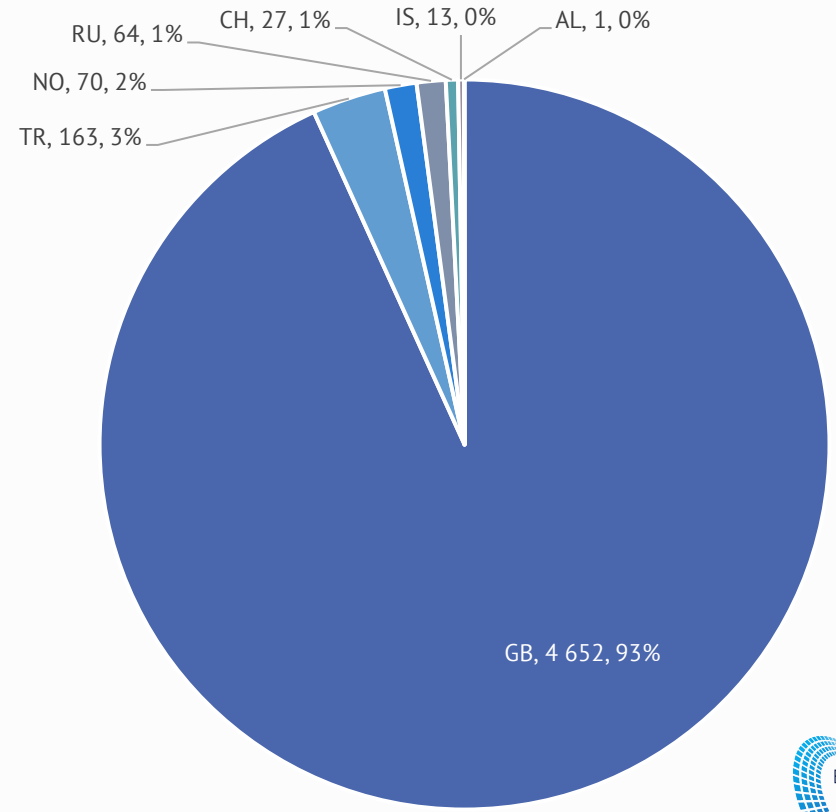
The dominance of British content in 'other European' TV seasons

- ▶ 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



Origin of other European TV seasons in SVOD catalogues



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.

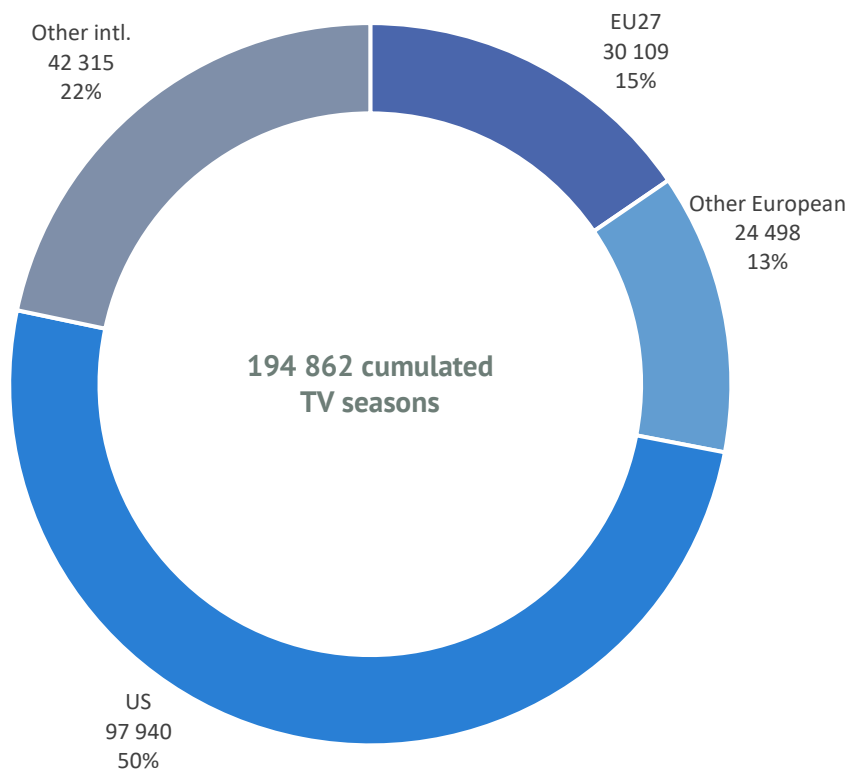
And in number of catalogues, EU27 TV content circulated slightly better on SVOD

- ▶ 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).

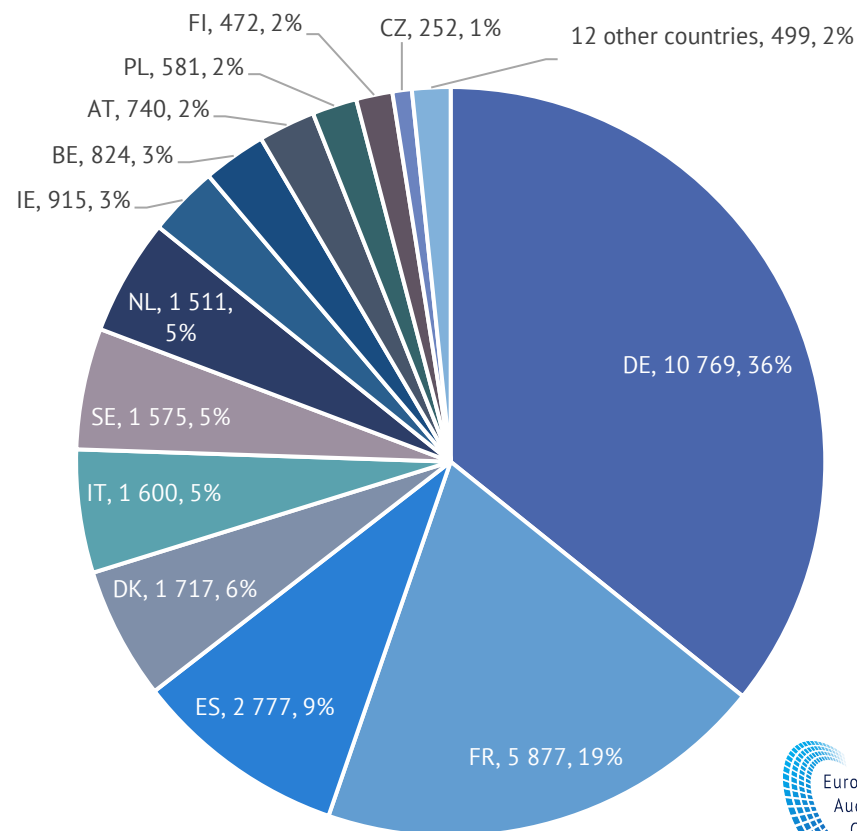
Almost 200 000 cumulated TV seasons available in VOD catalogues, 15% from EU27

- ▶ 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

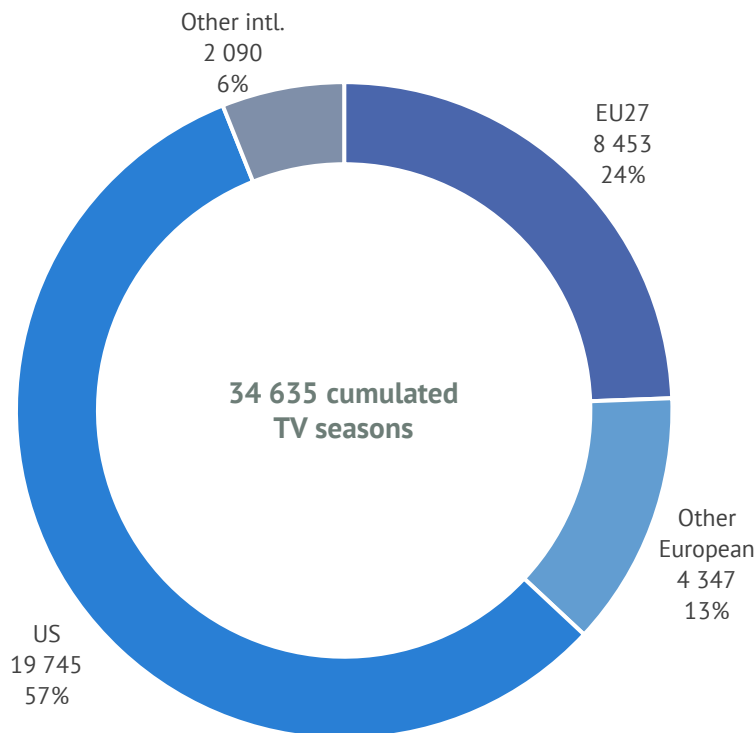


Source: JustWatch data

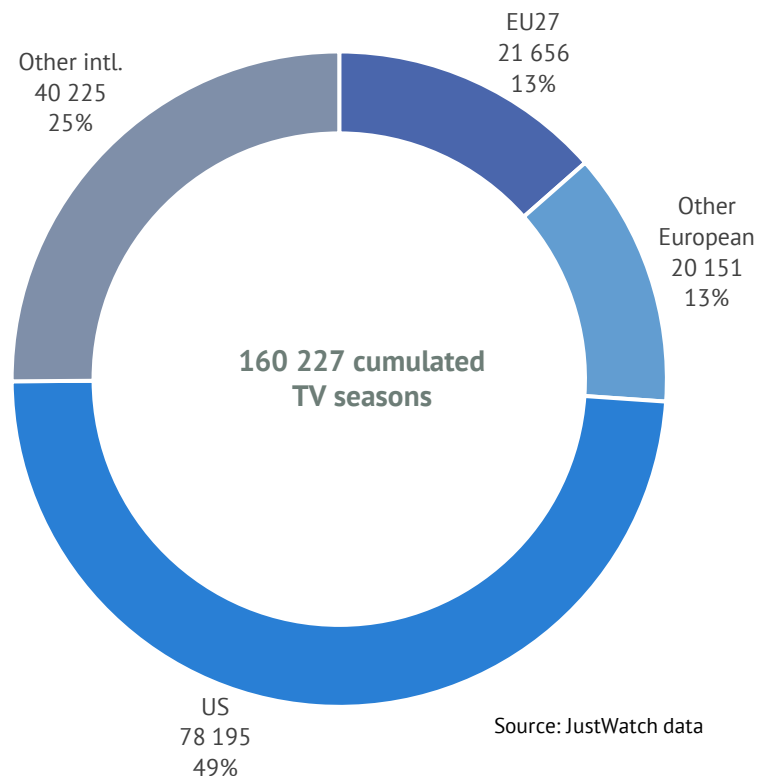
24% of cumulated TV seasons on TVOD were of EU27 origin, 13% on SVOD

- ▶ 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.**

Origin of TV seasons in 49 TVOD catalogues



Origin of TV seasons in 307 SVOD catalogues



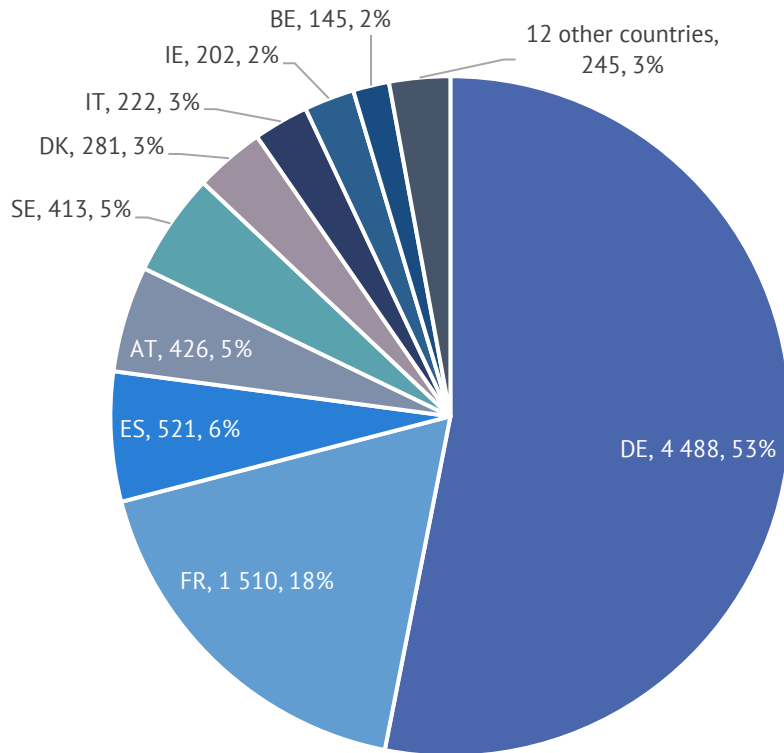
Source: JustWatch data

(*) EU27 and Other European origins together.

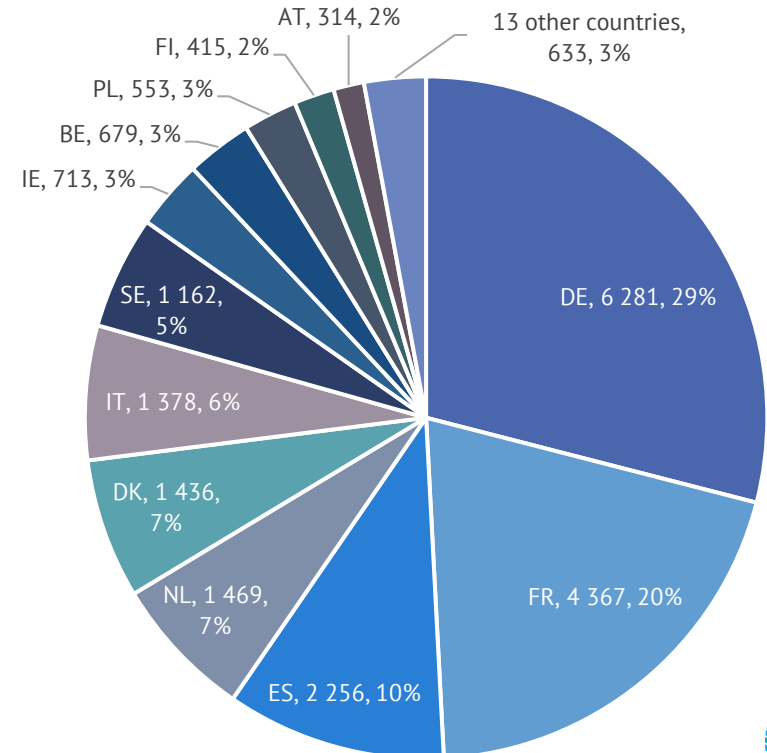
Origin of cumulated EU27 content by business model: German dominance on TVOD

- ▶ 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.

Origin of EU27 TV seasons in 49 TVOD catalogues



Origin of EU27 TV seasons in 307 SVOD catalogues



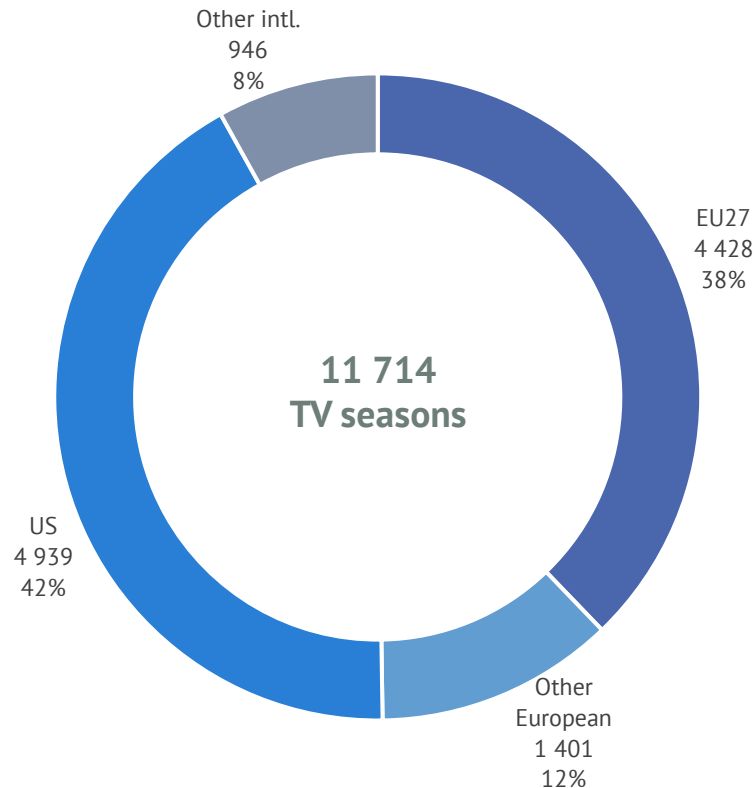
Source: JustWatch data

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

National VOD services presented the highest shares of EU27 TV seasons...

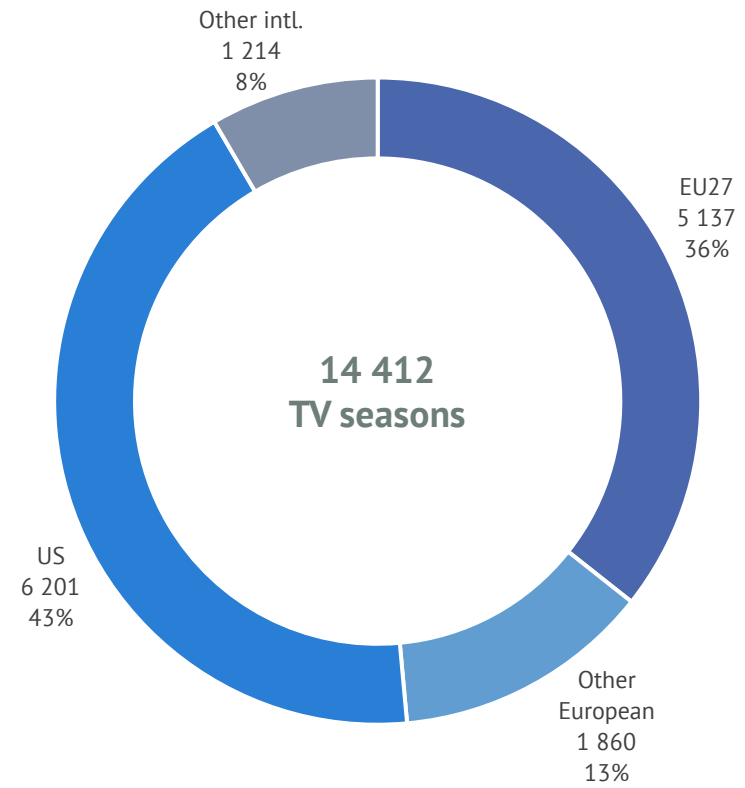
- ▶ Half of available TV content on national VOD catalogues was European.*
- ▶ National VOD services relied on EU27 TV seasons to cater for their national audiences.
- ▶ SVOD and TVOD national services showed a similar acquisition strategy.

Origin of TV seasons in 15 national TVOD catalogues



(*) EU27 and Other European origins together.

Origin of TV seasons in 30 national SVOD catalogues

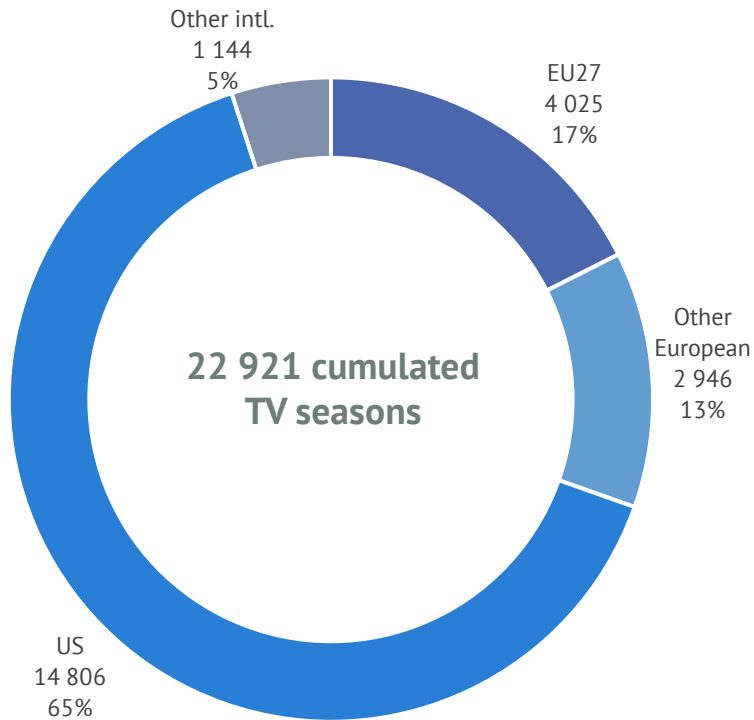


Source: JustWatch data

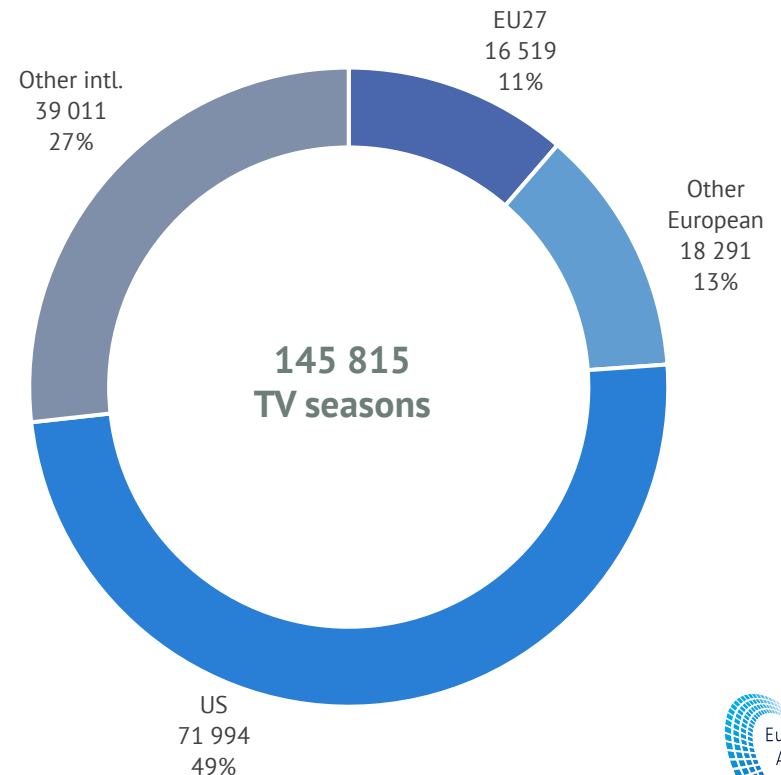
... while multi-country VOD services relied more heavily on US TV seasons

- ▶ 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



Origin of TV seasons in 277 multi-country SVOD catalogues



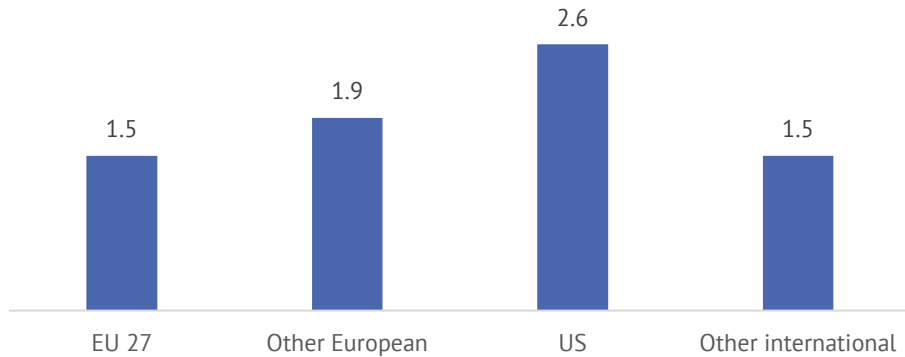
(*) EU27 and Other European origins together.

Source: JustWatch data

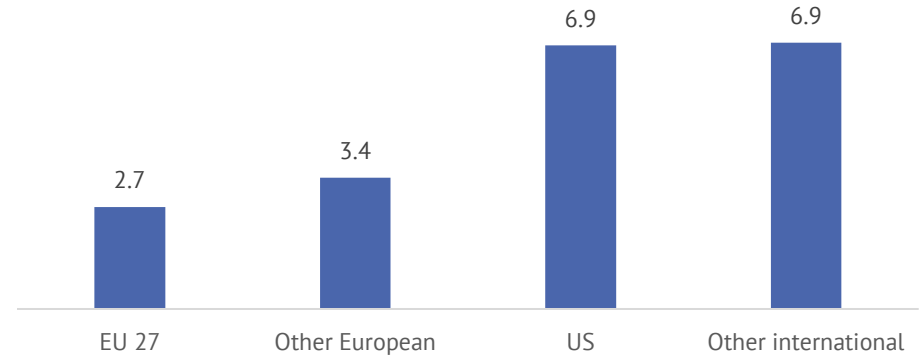
EU27 TV seasons circulated in a smaller number of countries than other origins

- ▶ 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.

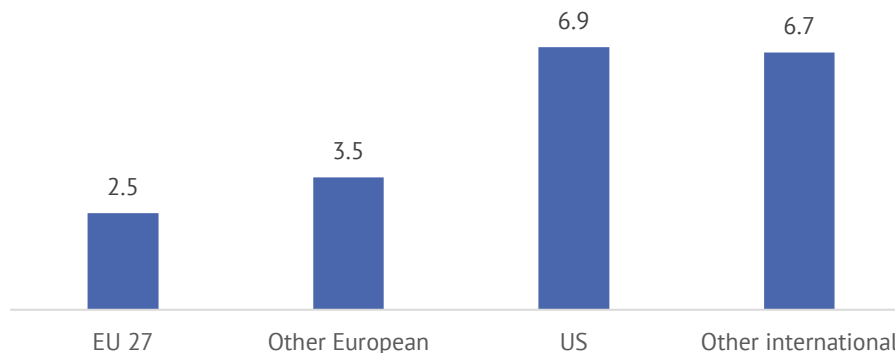
TVOD – Average circulation of seasons in countries by region of origin



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



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

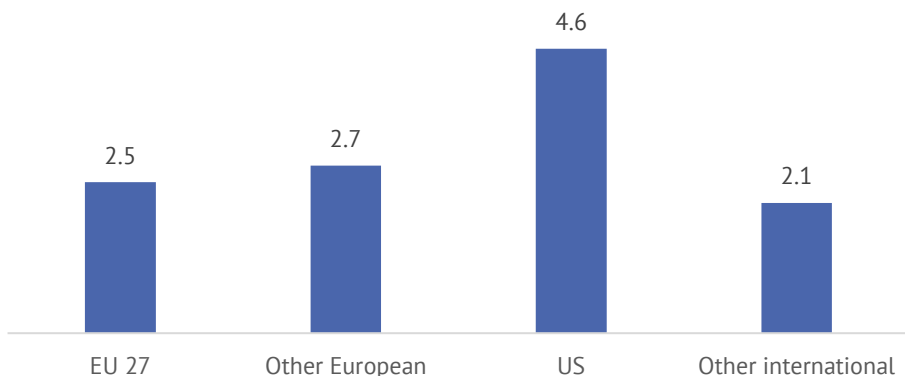


(*) EU27 and Other European origins together.

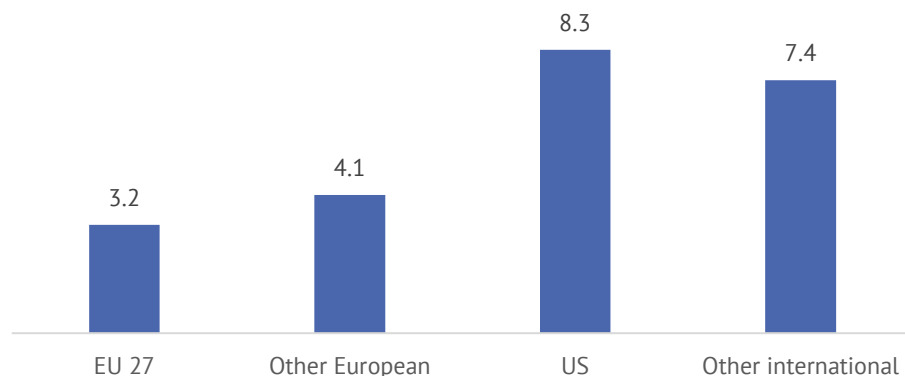
Also in number of catalogues, EU27 content circulated less than other origins

- ▶ 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.

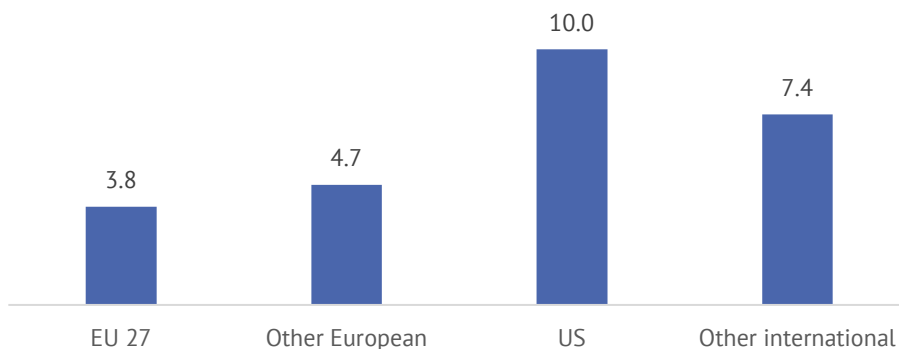
TVOD – Average circulation of seasons on services by region of origin



SVOD – Average circulation of seasons on services by region of origin



All VOD services – Average circulation of seasons on services by region of origin



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.

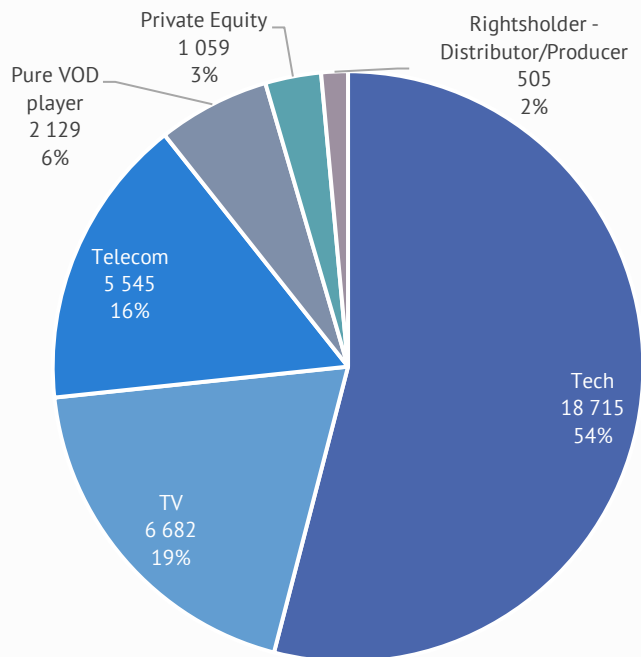
...but the total offer of EU27 TV seasons was higher on SVOD global services

- ▶ 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.

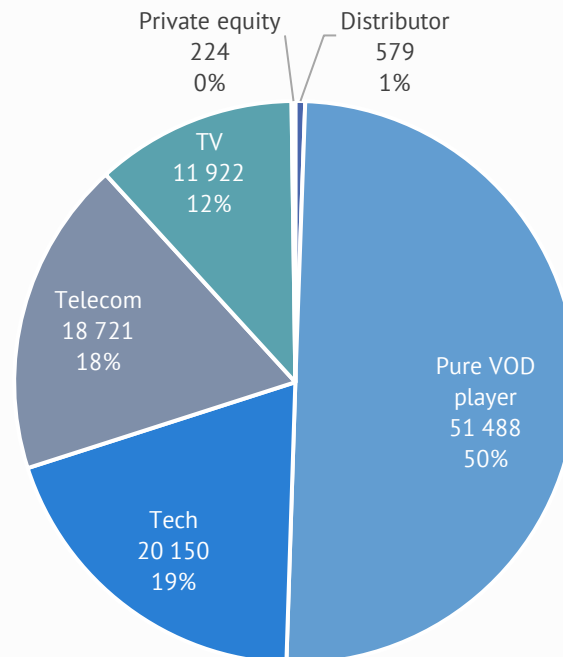
Biggest number of seasons found on pure VOD (SVOD), TV (TVOD), tech and telecom

▶ **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



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



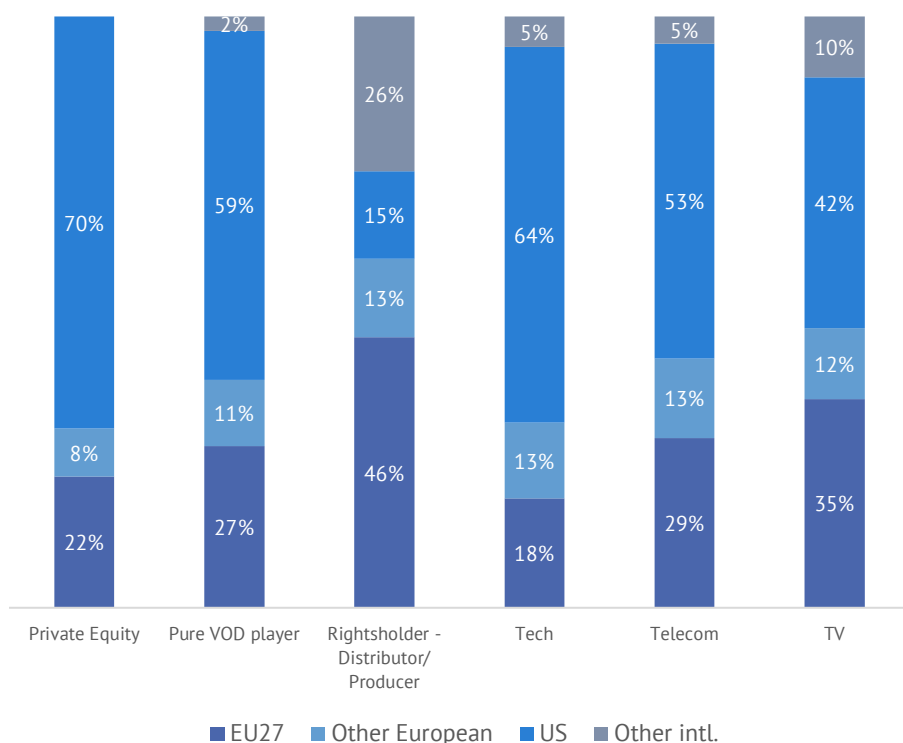
Core business	Number of TVOD catalogues	Average number of seasons/catalogue	Number of SVOD catalogues	Average number of seasons/catalogue
Private Equity	3	353	5	64
Pure VOD player	7	304	50	1 302
Rightsholder - Distributor/Producer	3	168	119	62
Tech	21	891	50	650
Telecom	8	693	33	792
TV	7	955	50	575

Source: JustWatch data

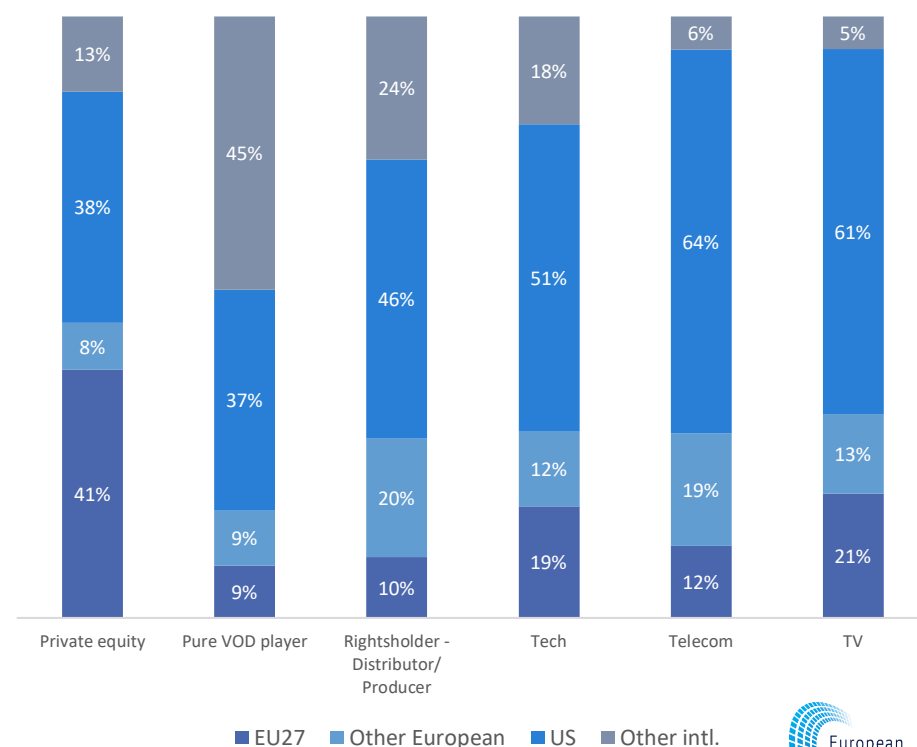
Sharp differences in the composition of catalogues by core business of service owners

- ▶ 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

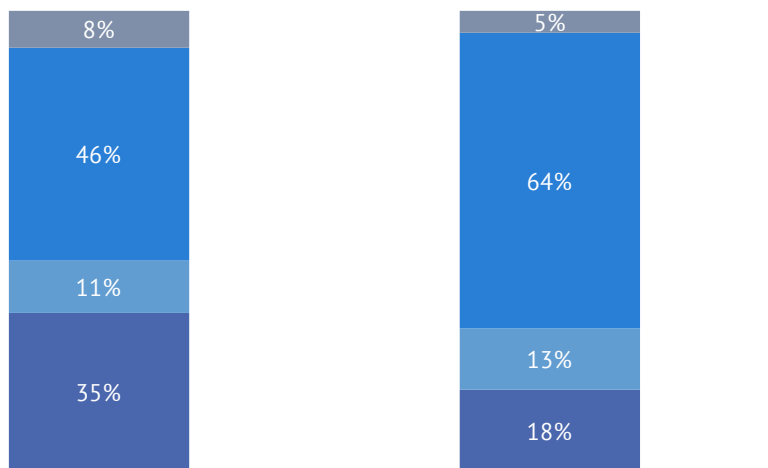


Source: JustWatch data

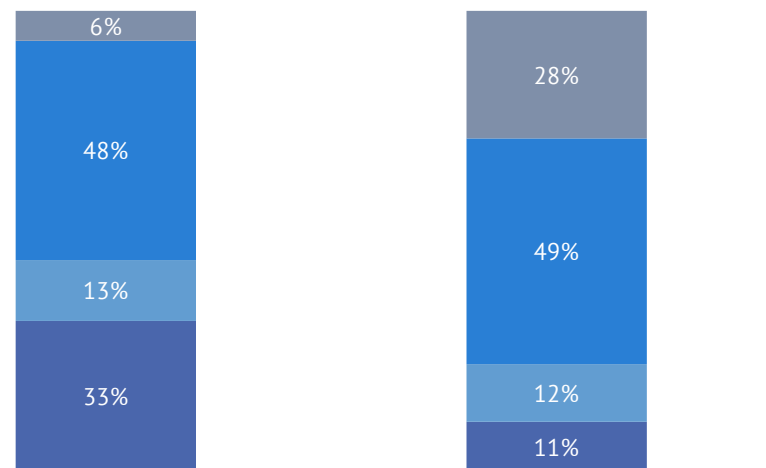
Higher shares of EU27 TV content on EU-owned services...

- ▶ 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



SVOD – Share of TV seasons by origin of service owner



■ EU 27 ■ Other European ■ US ■ Other international

■ EU 27 ■ Other European ■ US ■ Other international

Origin of service owner	Number of TVOD catalogues	Average number of seasons/catalogue	Number of SVOD catalogues	Average number of seasons/catalogue
EU	24	570	38	509
Global services	25	838	269	524

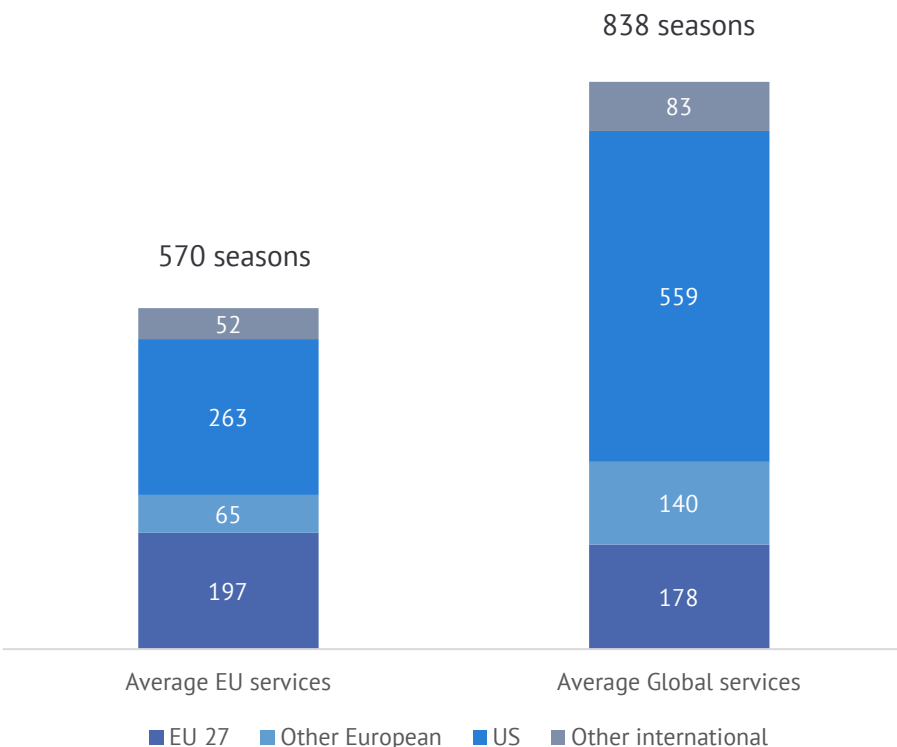
(*) EU27 and Other European origins together.

Source: JustWatch data

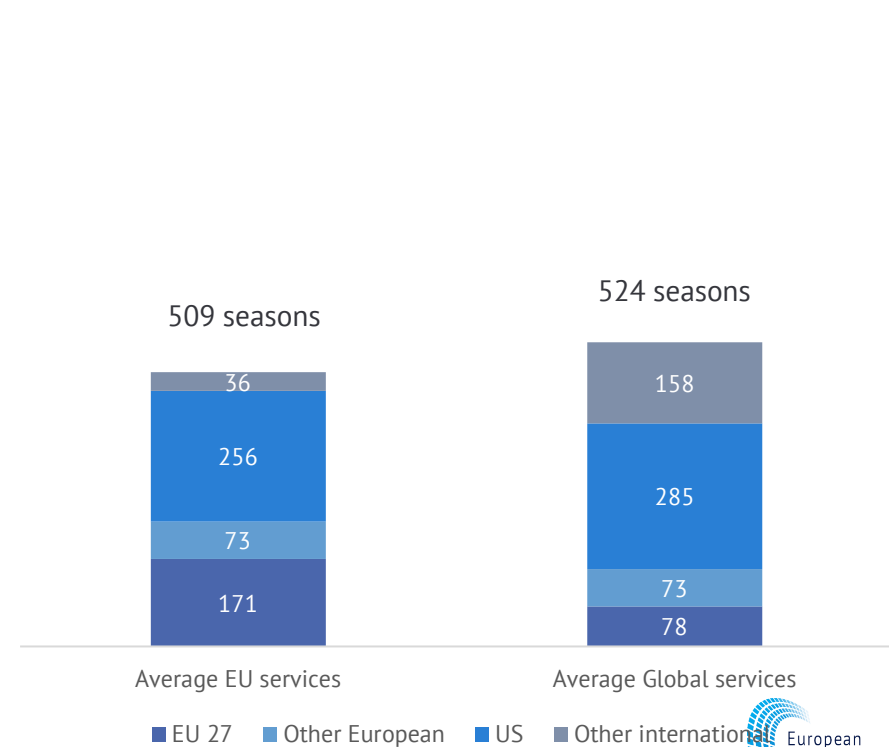
...but the average offer differed: on EU-owned SVOD and on global TVOD services

- ▶ 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



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



Source: JustWatch data

C.5 – Composition of catalogues by national and EU27 non-national TV contents

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.

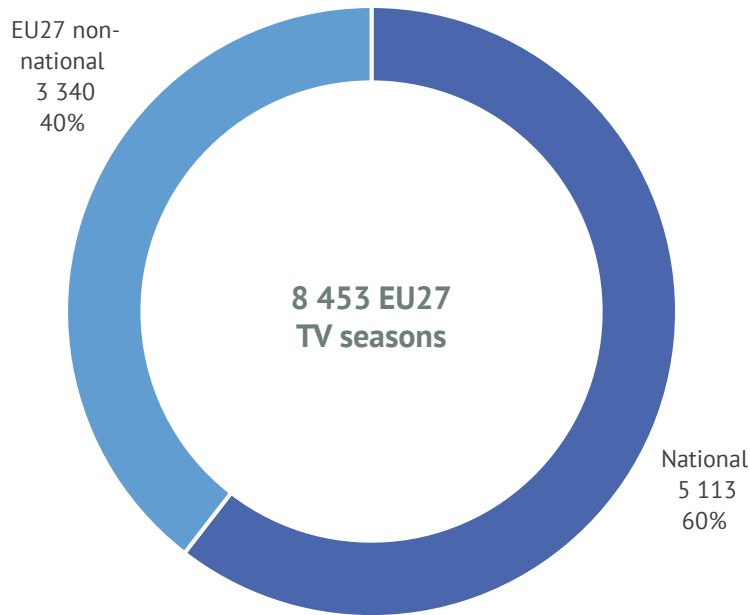
National SVOD services strongly built their offer on national TV seasons

- ▶ 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.

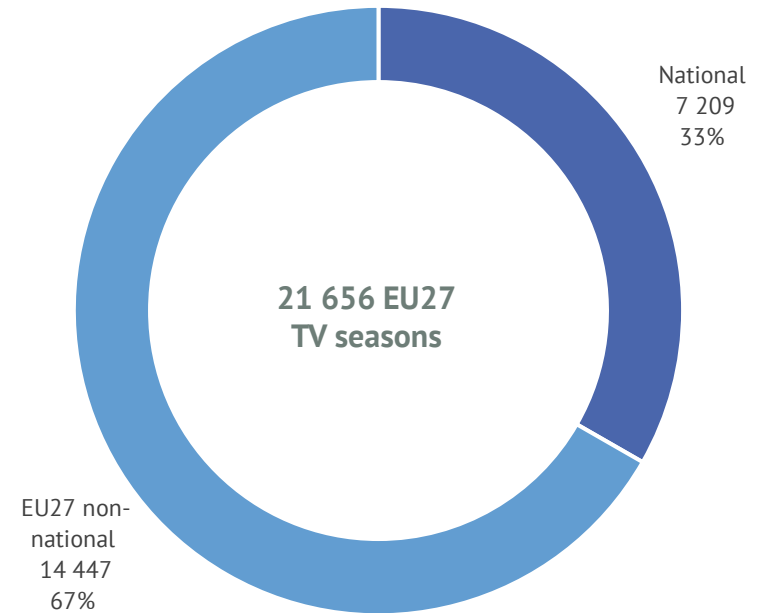
EU27: national TV seasons on TVOD, while non-national EU27 content on SVOD

- ▶ 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



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

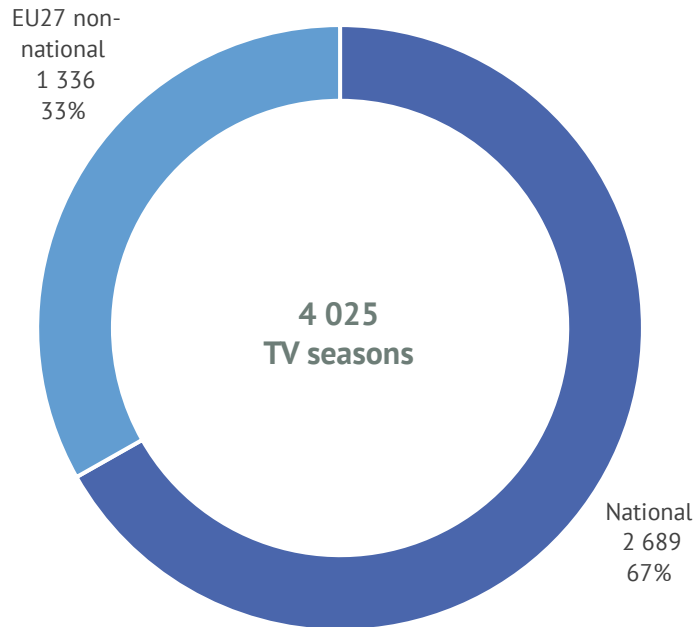


Source: JustWatch data

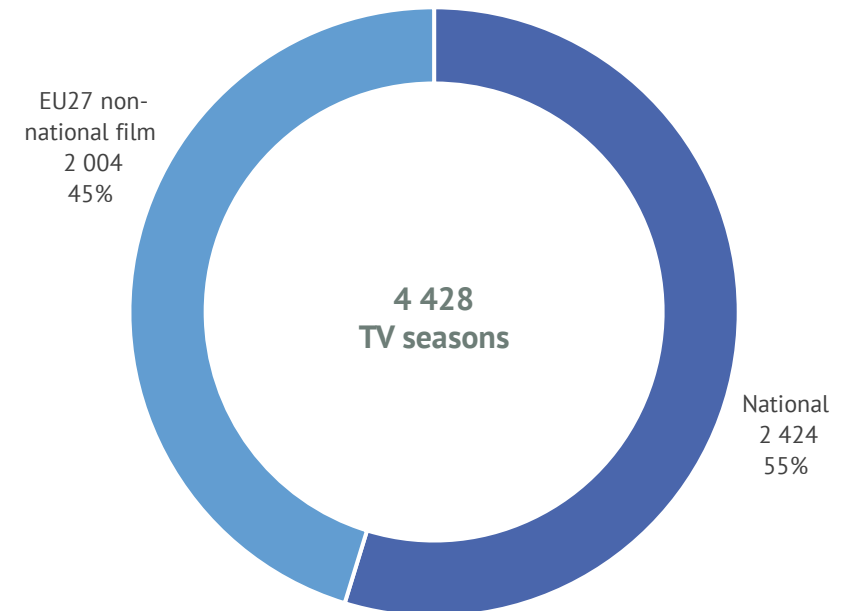
EU27: bigger offer of national TV content on multi-country TVOD services

- ▶ 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



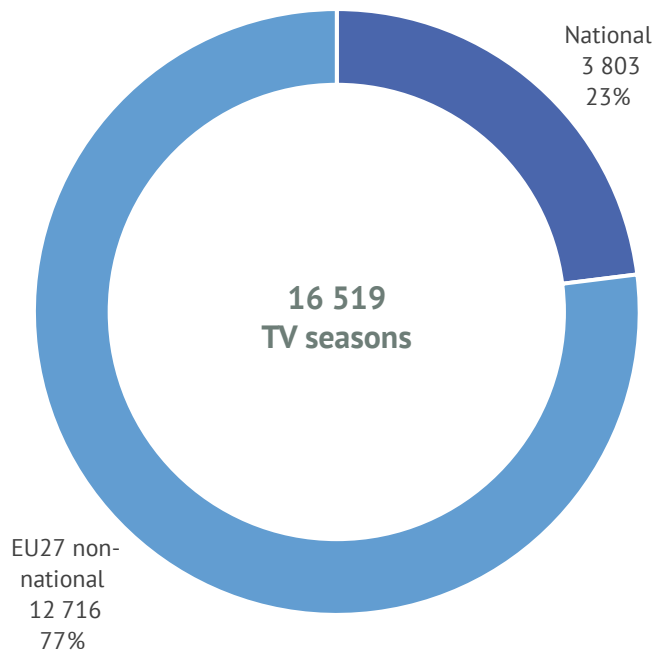
TVOD national services - National vs EU non-national seasons



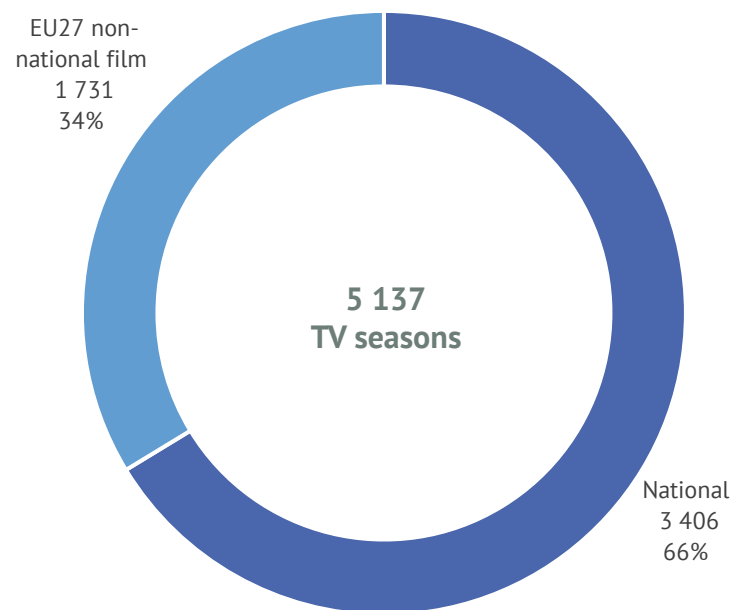
EU27: national SVOD services equally built their offer on national TV seasons

- ▶ 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.

SVOD multi-country services - National vs EU non-national seasons



SVOD national services - National vs EU non-national seasons



Source: JustWatch data

C.6 – Focus on the Export of European TV contents in EU27, on TVOD and SVOD

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.

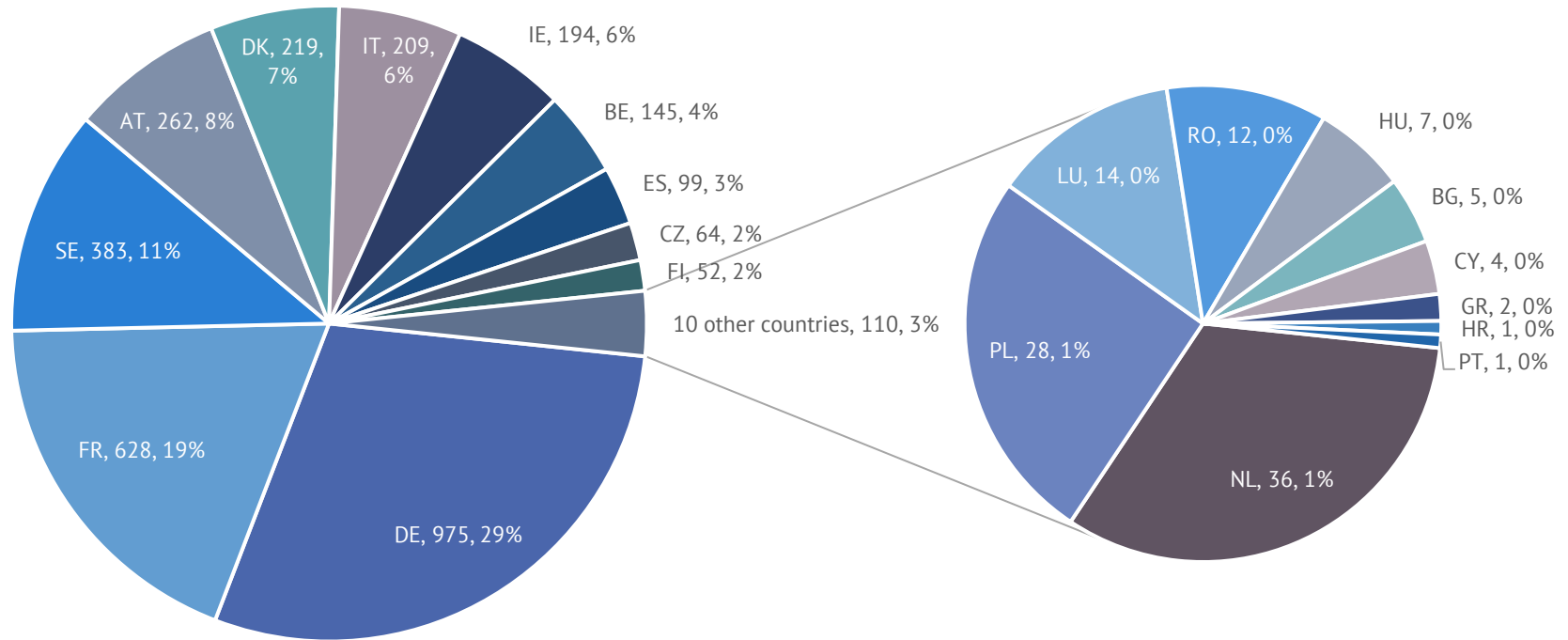
Better export rates and country reach on SVOD than on TVOD.

- ▶ 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

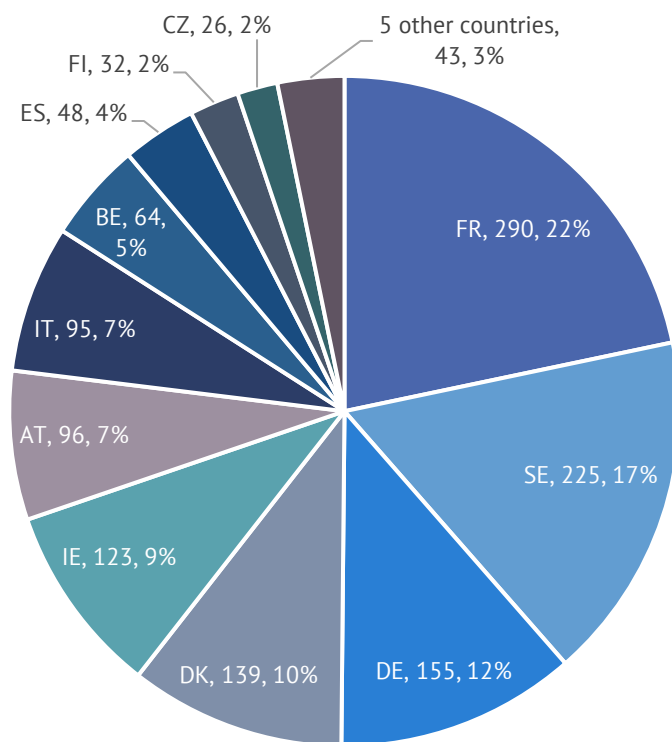


(*) Partly due to the weight of German and Austrian services in the sample.

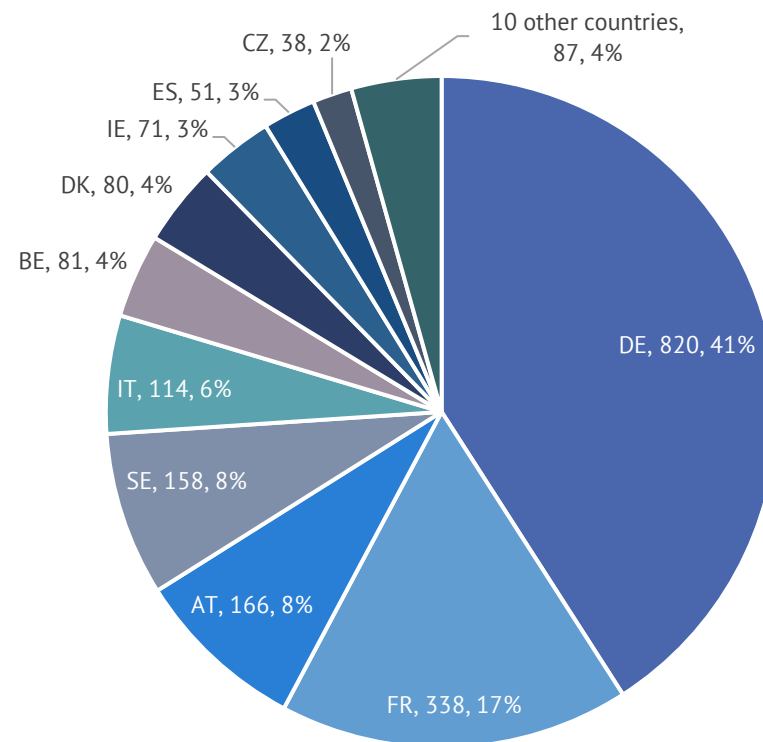
Origin of EU27 TV content for multi-country and national TVOD catalogues differed

- ▶ 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



Export of EU27 TV seasons in 15 national TVOD catalogues



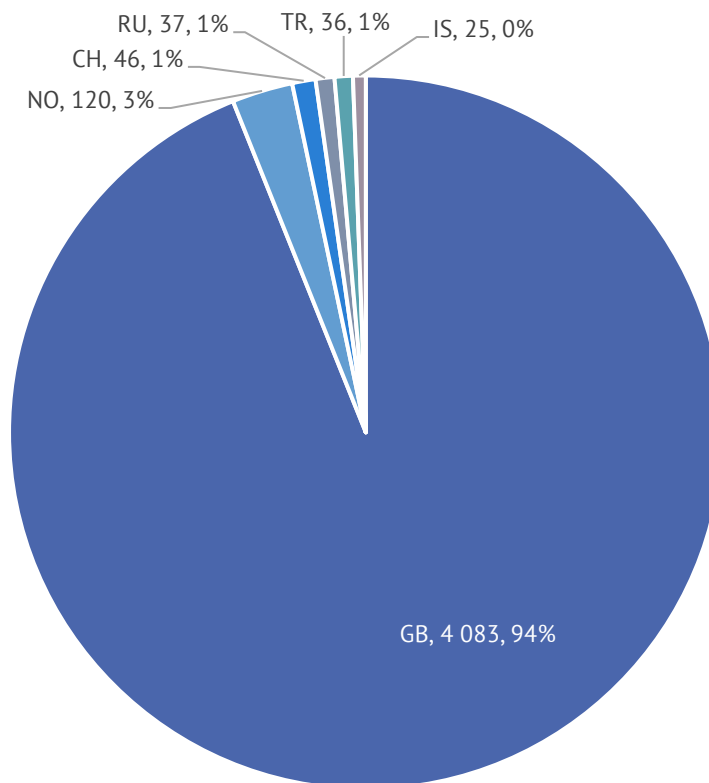
(*) Partly due to the weight of German and Austrian services in the sample.

Source: JustWatch data

Other European exported TV seasons on TVOD were massively British

- ▶ 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.

TVOD – other European TV seasons, by country of origin

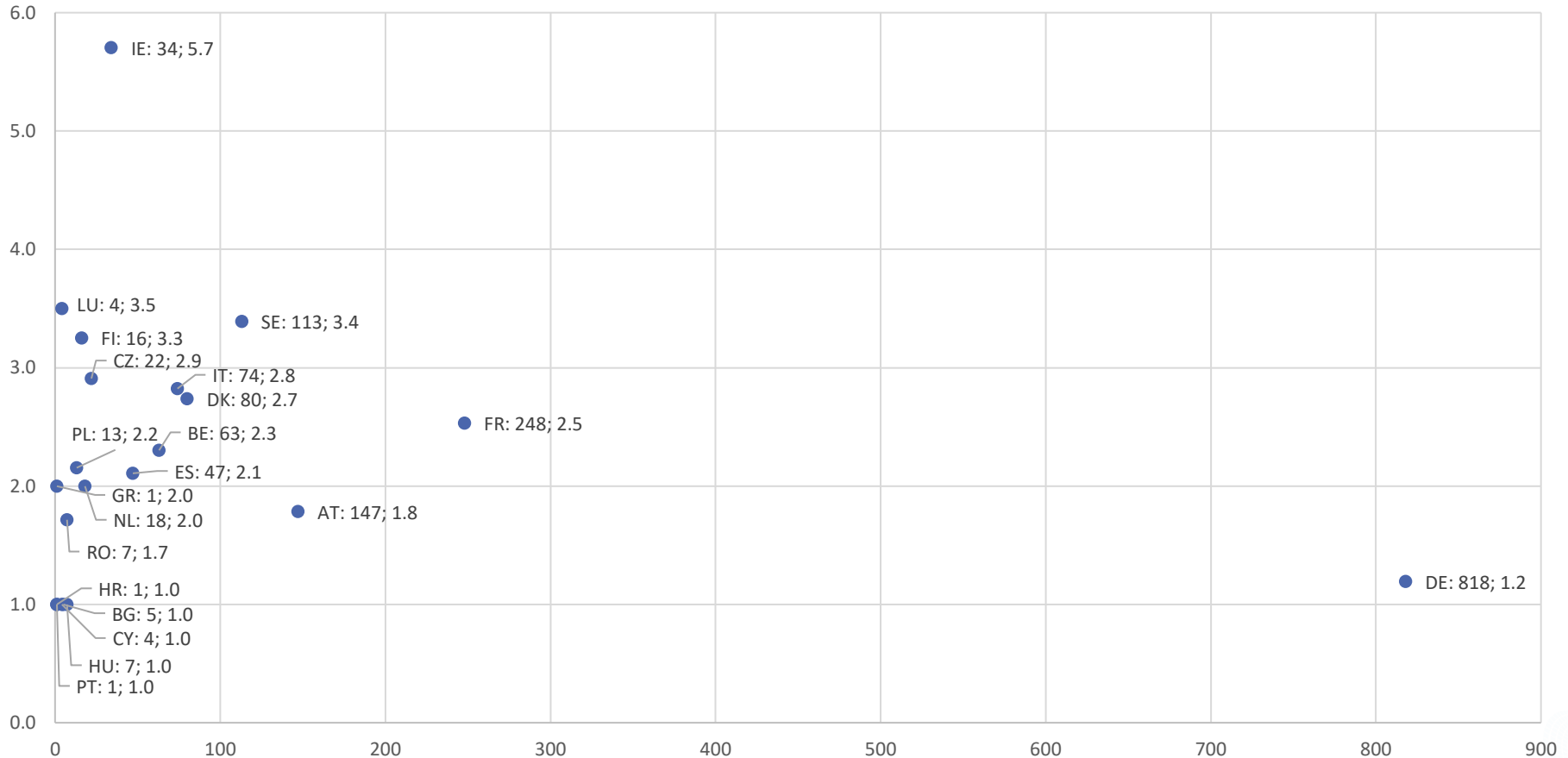


Source: JustWatch data

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

Top 20 EU27 exported TV seasons on TVOD services: Ireland dominated with fiction TV series

- ▶ 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

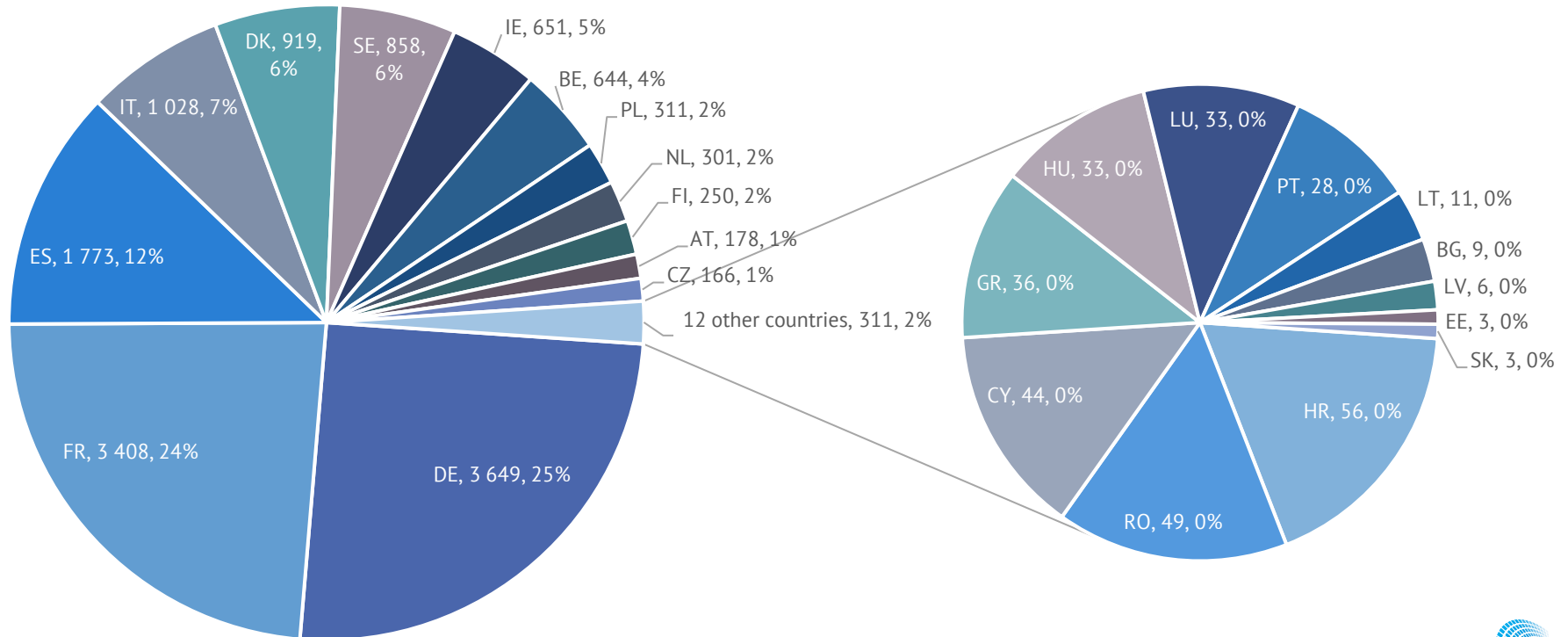
Season name	Year of production	Production country	Export EU catalogues	Export EU countries
The Tudors S4	2010	IE,CA,US,GB	16	8
Vikings S1	2013	IE,CA	16	7
The Tudors S2	2008	IE,CA,US,GB	14	7
The Tudors S3	2009	IE,CA,US,GB	14	7
Vikings S2	2014	IE,CA	14	7
Vikings S3	2015	IE,CA	14	7
The Tudors S1	2007	IE,CA,US,GB	13	6
Vikings S6	2019	IE,CA	12	7
Morden i Sandhamn S1	2010	SE	12	5
L'amica geniale S1	2018	IT,US	11	6
Vikings S4	2016	IE,CA	11	5
Bron/Broen S3	2015	SE,DK,DE	10	6
Gomorra - La serie S3	2017	IT,DE	10	6
Gomorra - La serie S1	2014	IT,DE	10	5
L'amica geniale S2	2020	IT,US	10	5
Morden i Sandhamn S2	2012	SE	10	5
Morden i Sandhamn S4	2014	SE	10	5
Au service de la France S1	2015	FR	10	4
Ainsi soient-ils S1	2012	FR	9	3
Ainsi soient-ils S2	2014	FR	9	3

Source: JustWatch data

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

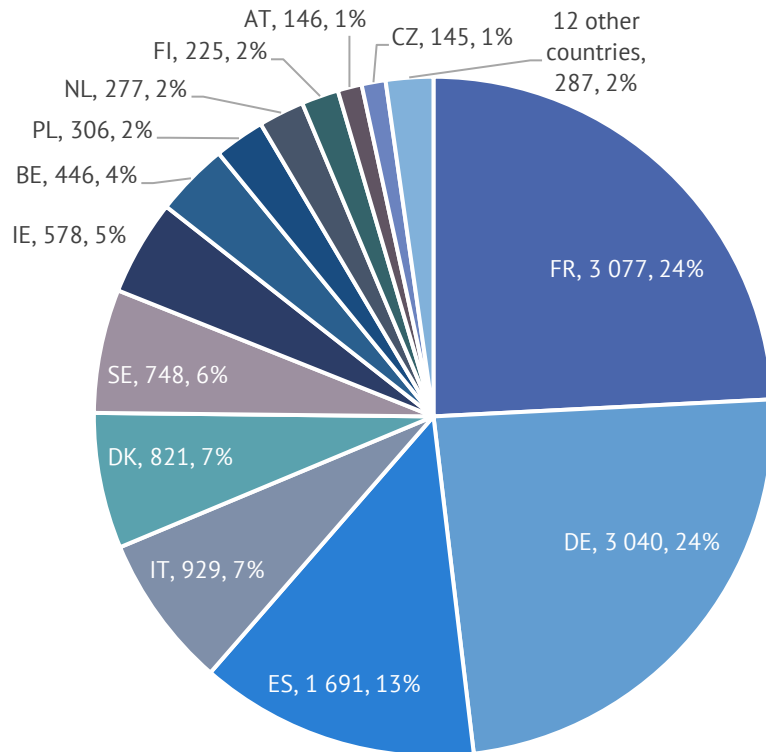


Source: JustWatch data

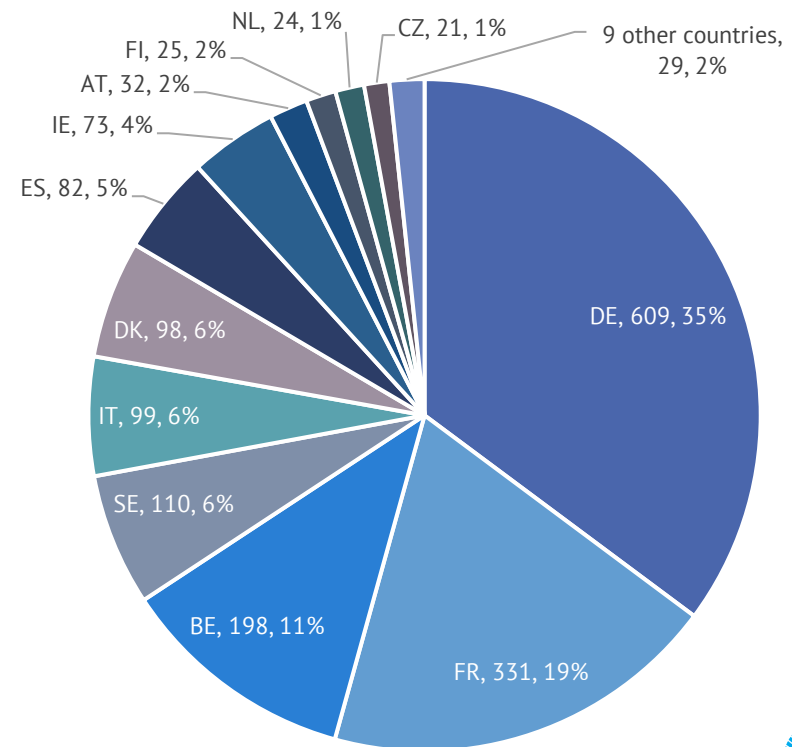
Multi-country and national SVOD mainly built on German and French TV content

- ▶ 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



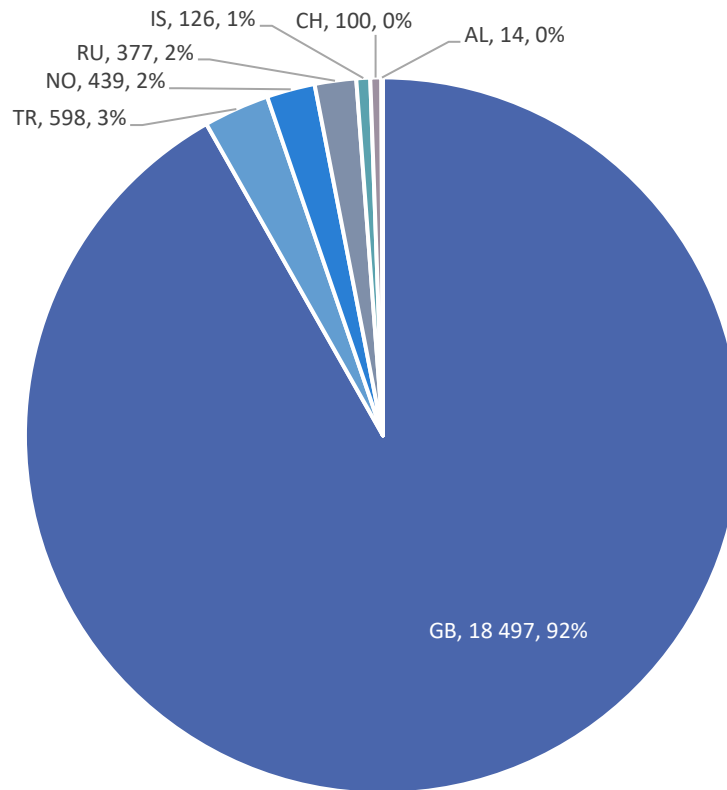
(*) Partly due to the weight of German and Austrian services in the sample.

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.

SVOD – Other European TV seasons, by country of origin

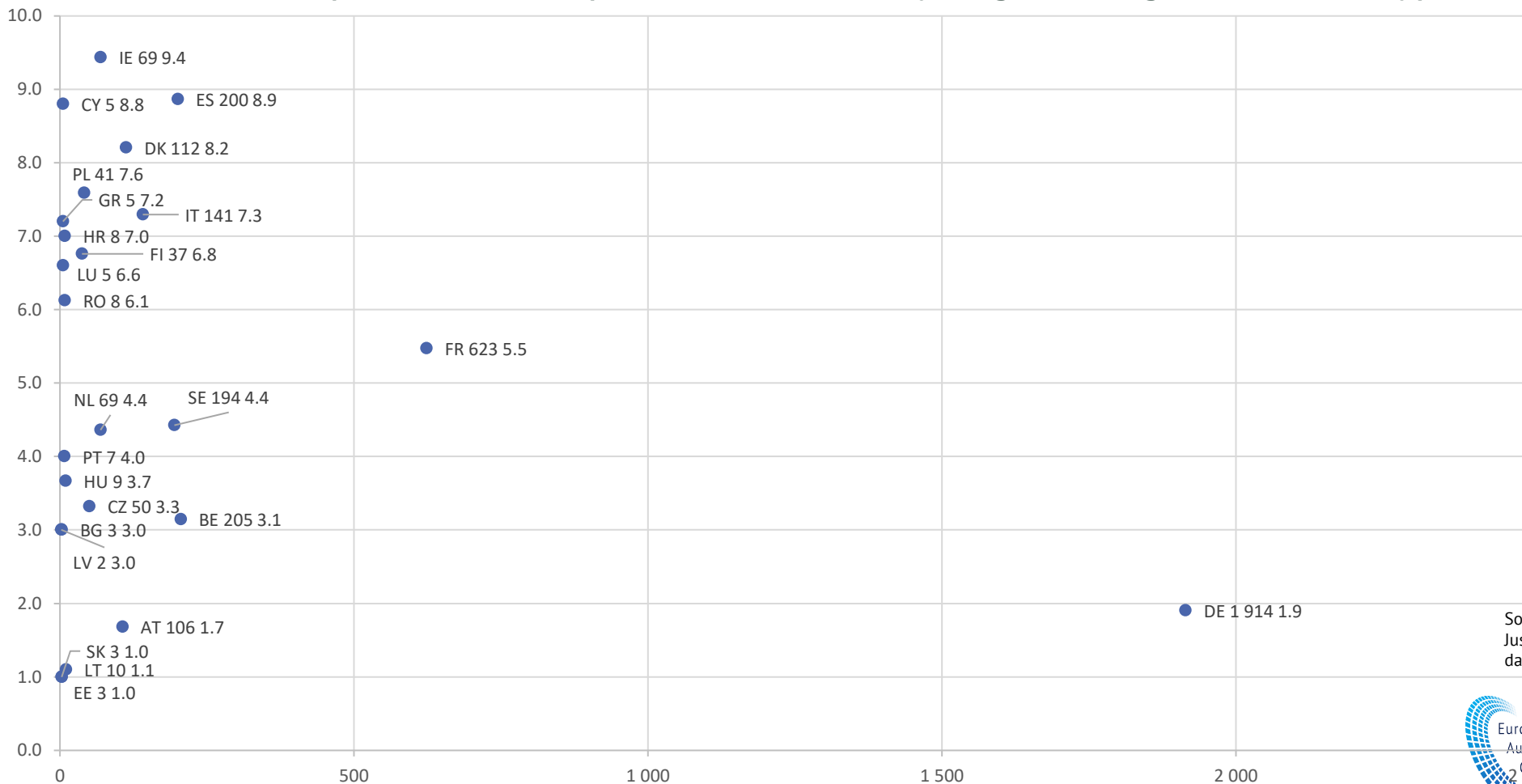


Source: JustWatch data

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

- ▶ 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.

SVOD – Number of unique EU27 TV seasons exported outside of their country of origin and average non-national country presence



Source:
JustWatch
data

Read the matrix as: 623 French TV seasons were exported with an average country presence in 5,5 countries

Top 20 EU27 exported TV seasons on SVOD services: Irish fiction and Danish animation ruled

- ▶ 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

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

Source: JustWatch data

Annex

**Services and country catalogues included
in the film and TV samples**

TVOD catalogues and countries in the film sample

Name of catalogue	Name of catalogue	Name of catalogue	Name of catalogue
Aerovod CZ	Google Play Movies NL	Microsoft Films & TV DE	SF Anytime SE
alles kino AT	Google Play Movies PL	Microsoft Films & TV DK	Sky Store AT
alles kino DE	Google Play Movies PT	Microsoft Films & TV ES	Sky Store DE
Atresplayer ES	Google Play Movies SE	Microsoft Films & TV FI	Sky Store IE
Bbox VOD FR	Google Play Movies SK	Microsoft Films & TV FR	Spamflix AT
Blockbuster DK	IFFR Unleashed NL	Microsoft Films & TV IE	Spamflix BE
Blockbuster FI	iTunes AT	Microsoft Films & TV IT	Spamflix CZ
Blockbuster SE	iTunes BE	Microsoft Films & TV NL	Spamflix DE
Canal VOD FR	iTunes CZ	Microsoft Films & TV SE	Spamflix DK
Chili AT	iTunes DE	MovieSaints DE	Spamflix EE
Chili DE	iTunes DK	O2TV CZ	Spamflix FI
Chili IT	iTunes EE	Orange VOD FR	Spamflix FR
Chili PL	iTunes ES	Pantaflix AT	Spamflix HU
cinema[s] @ la demande FR	iTunes FI	Pantaflix DE	Spamflix IE
Dogwoof DE	iTunes FR	Pantaflix FR	Spamflix IT
Dogwoof FR	iTunes HU	Pathé Thuis NL	Spamflix LT
Elisa Viihde FI	iTunes IE	Picl NL	Spamflix LV
EntertainTV DE	iTunes IT	Prima Videopůjčovna CZ	Spamflix NL
Filmin TVOD ES	iTunes LT	QFT Player IE	Spamflix PL
Filmo TV FR	iTunes LV	Rakuten TV AT	Spamflix PT
Flimmit AT	iTunes NL	Rakuten TV BE	Spamflix RO
Flimmit DE	iTunes PL	Rakuten TV CZ	Spamflix SE
Google Play Movies AT	iTunes PT	Rakuten TV DE	TriArt SE
Google Play Movies BE	iTunes SE	Rakuten TV DK	UniversCiné France FR
Google Play Movies CZ	iTunes SK	Rakuten TV ES	Videobuster AT
Google Play Movies DE	K2Studio SK	Rakuten TV FI	Videobuster DE
Google Play Movies DK	Kino on Demand DE	Rakuten TV FR	Volta IE
Google Play Movies EE	Kino VOD Club AT	Rakuten TV IE	YouTube Movies DE
Google Play Movies ES	Kuki CZ	Rakuten TV IT	YouTube Movies FR
Google Play Movies FI	La Toile FR	Rakuten TV NL	YouTube Movies HU
Google Play Movies HU	LaCinetek FR	Rakuten TV PT	YouTube Movies PL
Google Play Movies IE	Maxdome Store AT	Rakuten TV SE	YouTube Movies PT
Google Play Movies IT	Maxdome Store DE	Rakuten TV SK	Ziggo NL
Google Play Movies LT	MEO PT	SF Anytime DK	
Google Play Movies LV	Microsoft Films & TV AT	SF Anytime FI	

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

SVOD catalogues and countries in the film sample 1/2

Name of catalogue	Name of catalogue	Name of catalogue	Name of catalogue	Name of catalogue
Acorn TV DK	Apple TV+ DE	BroadwayHD DK	DaFilms BE	Disney+ FI
Acorn TV NL	Apple TV+ DK	BroadwayHD EE	DaFilms CZ	Disney+ FR
Acorn TV SE	Apple TV+ EE	BroadwayHD ES	DaFilms DE	Disney+ IE
ALL 4 IE	Apple TV+ ES	BroadwayHD FI	DaFilms DK	Disney+ IT
Amazon Arthaus AT	Apple TV+ FI	BroadwayHD FR	DaFilms EE	Disney+ NL
Amazon Arthaus DE	Apple TV+ FR	BroadwayHD HU	DaFilms ES	Disney+ PT
Amazon Prime Video AT	Apple TV+ HU	BroadwayHD IE	DaFilms FI	Disney+ SE
Amazon Prime Video BE	Apple TV+ IE	BroadwayHD IT	DaFilms FR	Docsville AT
Amazon Prime Video BG	Apple TV+ IT	BroadwayHD LT	DaFilms HU	Docsville BE
Amazon Prime Video CY	Apple TV+ LT	BroadwayHD LV	DaFilms IE	Docsville CZ
Amazon Prime Video CZ	Apple TV+ LV	BroadwayHD NL	DaFilms IT	Docsville DE
Amazon Prime Video DE	Apple TV+ NL	BroadwayHD PL	DaFilms LT	Docsville DK
Amazon Prime Video DK	Apple TV+ PL	BroadwayHD PT	DaFilms LV	Docsville EE
Amazon Prime Video EE	Apple TV+ PT	BroadwayHD RO	DaFilms NL	Docsville ES
Amazon Prime Video ES	Apple TV+ SE	BroadwayHD SE	DaFilms PL	Docsville FI
Amazon Prime Video FI	Apple TV+ SK	C More DK	DaFilms PT	Docsville FR
Amazon Prime Video FR	Argo AT	C More FI	DaFilms RO	Docsville HU
Amazon Prime Video HR	Argo BE	C More SE	DaFilms SE	Docsville IE
Amazon Prime Video HU	Argo CZ	Canalplus FR	Dekkoo AT	Docsville IT
Amazon Prime Video IE	Argo DE	ComHem Play SE	Dekkoo BE	Docsville LT
Amazon Prime Video IT	Argo DK	ConTV Comics DE	Dekkoo CZ	Docsville LV
Amazon Prime Video LT	Argo EE	ConTV Comics NL	Dekkoo DE	Docsville NL
Amazon Prime Video LU	Argo ES	curiositystream AT	Dekkoo DK	Docsville PL
Amazon Prime Video LV	Argo FI	curiositystream BE	Dekkoo EE	Docsville PT
Amazon Prime Video MT	Argo FR	curiositystream CZ	Dekkoo ES	Docsville RO
Amazon Prime Video NL	Argo HU	curiositystream DE	Dekkoo FI	Docsville SE
Amazon Prime Video PL	Argo IE	curiositystream DK	Dekkoo FR	Draken Film SE
Amazon Prime Video PT	Argo IT	curiositystream EE	Dekkoo HU	Film1 NL
Amazon Prime Video RO	Argo LT	curiositystream ES	Dekkoo IE	Filmin Plus ES
Amazon Prime Video SE	Argo LV	curiositystream FI	Dekkoo IT	Filmstriben DK
Amazon Prime Video SI	Argo NL	curiositystream FR	Dekkoo LT	Filmtastic Amazon Char
Amazon Prime Video SK	Argo PL	curiositystream HU	Dekkoo LV	Fubo TV ES
Amazon StarzPlay ES	Argo PT	curiositystream IE	Dekkoo NL	Go3 EE
Amazon StarzPlay FR	Argo RO	curiositystream IT	Dekkoo PL	Go3 LT
Amazon StarzPlay IT	Argo SE	curiositystream LT	Dekkoo PT	Go3 LV
Amazon StarzPlay NL	Arthouse CNMA DE	curiositystream LV	Dekkoo RO	GuideDoc AT
Animax Plus Amazon Channel DE	Be tv BE	curiositystream NL	Dekkoo SE	GuideDoc DE
Anime Digital Network FR	BluTV DE	curiositystream PL	Disney+ AT	GuideDoc DK
Anime on Demand DE	BroadwayHD AT	curiositystream PT	Disney+ BE	GuideDoc EE
Apple TV+ AT	BroadwayHD BE	curiositystream RO	Disney+ DE	GuideDoc ES
Apple TV+ BE	BroadwayHD CZ	curiositystream SE	Disney+ DK	GuideDoc FI
Apple TV+ CZ	BroadwayHD DE	DaFilms AT	Disney+ ES	GuideDoc IE

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

SVOD catalogues and countries in the film sample 2/2

Name of catalogue	Name of catalogue	Name of catalogue	Name of catal	Name of catalogue	Name of catalogue
Disney+ FI	GuideDoc IT	Joyn DE	MUBI IE	Sky GO IT	Viaplay LT
Disney+ FR	GuideDoc LT	Joyn Plus DE	MUBI IT	Sky NOW TV IE	Viaplay LV
Disney+ IE	GuideDoc LV	Kividoo AT	MUBI LT	Sky Now TV IT	Viaplay SE
Disney+ IT	GuideDoc NL	Kividoo DE	MUBI LV	Sky Ticket AT	Videoland NL
Disney+ NL	GuideDoc PL	KPN NL	MUBI NL	Sky Ticket DE	Viki Rakuten DE
Disney+ PT	GuideDoc SE	LaCinetek AT	MUBI PL	Sky X AT	Vodafone TV CZ
Disney+ SE	HBO GO CZ	LaCinetek BE	MUBI PT	Sooner AT	Voyo CZ
Docsville AT	HBO GO HU	LaCinetek DE	MUBI RO	Sooner BE	Voyo SK
Docsville BE	HBO GO PL	MagellanTV AT	MUBI SE	Sooner DE	Watch4 AT
Docsville CZ	HBO Go PT	MagellanTV BE	Netflix AT	Starz Play Amazon Channel DE	Watch4 DE
Docsville DE	HBO GO RO	MagellanTV CZ	Netflix BE	Telia Play LT	WOW Presents Plus AT
Docsville DK	HBO GO SK	MagellanTV DE	Netflix CZ	Tenk FR	WOW Presents Plus BE
Docsville EE	HBO Nordic DK	MagellanTV DK	Netflix DE	TIMvision IT	WOW Presents Plus CZ
Docsville ES	HBO Nordic FI	MagellanTV EE	Netflix DK	TrueStory AT	WOW Presents Plus DE
Docsville FI	HBO Nordic SE	MagellanTV ES	Netflix EE	TrueStory BE	WOW Presents Plus DK
Docsville FR	Herzokino Amazon Channels DE	MagellanTV FI	Netflix ES	TrueStory CZ	WOW Presents Plus EE
Docsville HU	Hidive IE	MagellanTV FR	Netflix FI	TrueStory DE	WOW Presents Plus ES
Docsville IE	Hoichoi AT	MagellanTV HU	Netflix FR	TrueStory DK	WOW Presents Plus FI
Docsville IT	Hoichoi BE	MagellanTV IE	Netflix HU	TrueStory EE	WOW Presents Plus FR
Docsville LT	Hoichoi CZ	MagellanTV IT	Netflix IE	TrueStory ES	WOW Presents Plus HU
Docsville LV	Hoichoi DE	MagellanTV LT	Netflix IT	TrueStory FI	WOW Presents Plus IE
Docsville NL	Hoichoi DK	MagellanTV LV	Netflix LT	TrueStory FR	WOW Presents Plus IT
Docsville PL	Hoichoi EE	MagellanTV NL	Netflix LV	TrueStory HU	WOW Presents Plus LT
Docsville PT	Hoichoi ES	MagellanTV PL	Netflix NL	TrueStory IE	WOW Presents Plus LV
Docsville RO	Hoichoi FI	MagellanTV PT	Netflix PL	TrueStory IT	WOW Presents Plus NL
Docsville SE	Hoichoi FR	MagellanTV RO	Netflix PT	TrueStory LT	WOW Presents Plus PL
Draken Film SE	Hoichoi HU	MagellanTV SE	Netflix RO	TrueStory LV	WOW Presents Plus PT
Film1 NL	Hoichoi IE	Magio Kino SK	Netflix SE	TrueStory NL	WOW Presents Plus RO
Filmin Plus ES	Hoichoi IT	Maxdome AT	Netflix SK	TrueStory PL	WOW Presents Plus SE
Filmstriben DK	Hoichoi LT	Mediaset Infinity IT	NLZiET NL	TrueStory PT	Yelo Play BE
Filmtastic Amazon Channel DE	Hoichoi LV	Mediaset Premium Play IT	OCS GO FR	TrueStory RO	YouTube Premium AT
Fubo TV ES	Hoichoi NL	Movistar+ ES	Player PL	TrueStory SE	YouTube Premium BE
Go3 EE	Hoichoi PL	MUBI AT	realez DE	Turk On Video AT	YouTube Premium DE
Go3 LT	Hoichoi PT	MUBI BE	Ruutu FI	Turk On Video DE	YouTube Premium DK
Go3 LV	Hoichoi RO	MUBI CZ	SALTO FR	TV Now DE	YouTube Premium ES
GuideDoc AT	Hoichoi SE	MUBI DE	Shadowz FR	TV2 DK	YouTube Premium FI
GuideDoc DE	Home of Horror DE	MUBI DK	Shudder AT	UniversCine DE	YouTube Premium FR
GuideDoc DK	Horizon HU	MUBI EE	Shudder DE	UPC My Prime CZ	YouTube Premium HU
GuideDoc EE	Horizon RO	MUBI ES	Shudder IE	UPC My Prime SK	YouTube Premium IE
GuideDoc ES	Horizon/UPC PL	MUBI FI	Sky GO AT	Viaplay DK	YouTube Premium IT
GuideDoc FI	Horrify NL	MUBI FR	Sky GO DE	Viaplay EE	YouTube Premium PT
GuideDoc IE	IPLA PL	MUBI HU	Sky GO IE	Viaplay FI	YouTube Premium SE

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

TVOD catalogues and countries in the TV sample

Name of catalogue	Name of catalogue
Atresplayer ES	Microsoft Films & TV FI
Bbox VOD FR	Microsoft Films & TV FR
Blockbuster DK	Microsoft Films & TV IE
Blockbuster FI	Microsoft Films & TV IT
Blockbuster SE	Microsoft Films & TV NL
Canal VOD FR	Microsoft Films & TV SE
Chili AT	O2TV CZ
Chili DE	Orange VOD FR
Chili IT	Pantaflix AT
Chili PL	Pantaflix DE
Elisa Viihde FI	Pantaflix FR
EntertainTV DE	Rakuten TV AT
Filmin TVOD ES	Rakuten TV BE
Flimmit AT	Rakuten TV DE
Flimmit DE	Rakuten TV ES
Google Play Movies AT	Rakuten TV FR
Google Play Movies DE	Rakuten TV IT
iTunes DE	SF Anytime DK
iTunes FR	SF Anytime FI
Maxdome Store AT	Sky Store IE
Maxdome Store DE	Videobuster AT
Microsoft Films & TV AT	Videobuster DE
Microsoft Films & TV DE	YouTube Movies DE
Microsoft Films & TV DK	Ziggo NL
Microsoft Films & TV ES	

Country	TVOD catalogues
AT	8
BE	1
CZ	1
DE	11
DK	3
ES	4
FI	4
FR	7
IE	2
IT	3
NL	2
PL	1
SE	2
Total	49

SVOD catalogues and countries in the TV sample 1/2

Name of catalogue	Name of catalogue	Name of catalogue	Name of catalogue
Acorn TV DK	Anime on Demand DE	BroadwayHD IE	Crunchyroll NL
Acorn TV NL	Apple TV+ AT	BroadwayHD IT	Crunchyroll PL
Acorn TV SE	Apple TV+ BE	BroadwayHD LT	Crunchyroll PT
All 4 IE	Apple TV+ CZ	BroadwayHD LV	Crunchyroll RO
Amazon Arthaus AT	Apple TV+ DE	BroadwayHD NL	Crunchyroll SE
Amazon Arthaus DE	Apple TV+ DK	BroadwayHD PL	curiositystream AT
Amazon Prime Video AT	Apple TV+ EE	BroadwayHD PT	curiositystream BE
Amazon Prime Video BE	Apple TV+ ES	BroadwayHD RO	curiositystream CZ
Amazon Prime Video CZ	Apple TV+ FI	BroadwayHD SE	curiositystream DE
Amazon Prime Video DE	Apple TV+ FR	C More DK	curiositystream DK
Amazon Prime Video DK	Apple TV+ HU	C More FI	curiositystream EE
Amazon Prime Video EE	Apple TV+ IE	C More SE	curiositystream ES
Amazon Prime Video ES	Apple TV+ IT	Canal+ Séries FR	curiositystream FI
Amazon Prime Video FI	Apple TV+ LT	Canalplus FR	curiositystream FR
Amazon Prime Video FR	Apple TV+ LV	ComHem Play SE	curiositystream HU
Amazon Prime Video HU	Apple TV+ NL	ConTV Comics DE	curiositystream IE
Amazon Prime Video IE	Apple TV+ PL	ConTV Comics NL	curiositystream IT
Amazon Prime Video IT	Apple TV+ PT	Crunchyroll AT	curiositystream LT
Amazon Prime Video LT	Apple TV+ SE	Crunchyroll BE	curiositystream LV
Amazon Prime Video LV	Be tv BE	Crunchyroll CZ	curiositystream NL
Amazon Prime Video NL	BluTV DE	Crunchyroll DE	curiositystream PL
Amazon Prime Video PL	BroadwayHD AT	Crunchyroll DK	curiositystream PT
Amazon Prime Video PT	BroadwayHD BE	Crunchyroll EE	curiositystream RO
Amazon Prime Video RO	BroadwayHD CZ	Crunchyroll ES	curiositystream SE
Amazon Prime Video SE	BroadwayHD DE	Crunchyroll FI	Dekkoo AT
Amazon StarzPlay ES	BroadwayHD DK	Crunchyroll FR	Dekkoo BE
Amazon StarzPlay FR	BroadwayHD EE	Crunchyroll HU	Dekkoo CZ
Amazon StarzPlay IT	BroadwayHD ES	Crunchyroll IE	Dekkoo DE
Amazon StarzPlay NL	BroadwayHD FI	Crunchyroll IT	Dekkoo DK
Animax Plus Amazon Channel DE	BroadwayHD FR	Crunchyroll LT	Dekkoo EE
Anime Digital Network FR	BroadwayHD HU	Crunchyroll LV	Dekkoo ES

Country	SVOD catalogues
AT	18
BE	14
CZ	11
DE	31
DK	19
EE	12
ES	15
FI	18
FR	20
HU	13
IE	17
IT	19
LT	13
LV	12
NL	19
PL	14
PT	13
RO	11
SE	18
Total	307

SVOD catalogues and countries in the TV sample 2/2

Name of catalogue	Name of catalogue	Name of catalogue	Name of catalogue	Name of catalogue	Name of catalogue
Dekkoo FI	Hayu BE	Hoichoi PL	Maxdome AT	Sky GO AT	WOW Presents Plus DE
Dekkoo FR	Hayu DK	Hoichoi PT	Mediaset Infinity IT	Sky GO DE	WOW Presents Plus DK
Dekkoo HU	Hayu FI	Hoichoi RO	Mediaset Premium Play IT	Sky GO IE	WOW Presents Plus EE
Dekkoo IE	Hayu IE	Hoichoi SE	Movistar+ ES	Sky GO IT	WOW Presents Plus ES
Dekkoo IT	Hayu NL	Home of Horror DE	Netflix AT	Sky NOW TV IE	WOW Presents Plus FI
Dekkoo LT	Hayu SE	Horizon HU	Netflix BE	Sky Now TV IT	WOW Presents Plus FR
Dekkoo LV	HBO GO CZ	Horizon RO	Netflix CZ	Sky Ticket DE	WOW Presents Plus HU
Dekkoo NL	HBO GO HU	Horizon/UPC PL	Netflix DE	Sky X AT	WOW Presents Plus IE
Dekkoo PL	HBO GO PL	Horrify NL	Netflix DK	Starz Play Amazon Channel DE	WOW Presents Plus IT
Dekkoo PT	HBO Go PT	IPLA PL	Netflix EE	Telia Play LT	WOW Presents Plus LT
Dekkoo RO	HBO GO RO	Joyn DE	Netflix ES	TIMvision IT	WOW Presents Plus LV
Dekkoo SE	HBO Nordic DK	Joyn Plus DE	Netflix FI	Turk On Video AT	WOW Presents Plus NL
Discovery+ IT	HBO Nordic FI	Kividoo AT	Netflix FR	Turk On Video DE	WOW Presents Plus PL
Disney+ AT	HBO Nordic SE	Kividoo DE	Netflix HU	TV Now DE	WOW Presents Plus PT
Disney+ BE	Herzkino Amazon Channels DE	KPN NL	Netflix IE	TV2 DK	WOW Presents Plus RO
Disney+ DE	Hidive IE	MagellanTV AT	Netflix IT	Viaplay DK	WOW Presents Plus SE
Disney+ DK	Hoichoi AT	MagellanTV BE	Netflix LT	Viaplay EE	YouTube Premium AT
Disney+ ES	Hoichoi BE	MagellanTV CZ	Netflix LV	Viaplay FI	YouTube Premium BE
Disney+ FI	Hoichoi CZ	MagellanTV DE	Netflix NL	Viaplay LT	YouTube Premium DE
Disney+ FR	Hoichoi DE	MagellanTV EE	Netflix PL	Viaplay LV	YouTube Premium DK
Disney+ IE	Hoichoi DK	MagellanTV ES	Netflix PT	Viaplay SE	YouTube Premium ES
Disney+ IT	Hoichoi EE	MagellanTV FI	Netflix RO	Videoland NL	YouTube Premium FI
Disney+ NL	Hoichoi ES	MagellanTV FR	Netflix SE	Viki Rakuten DE	YouTube Premium FR
Disney+ PT	Hoichoi FI	MagellanTV HU	NLZIET NL	Wakanim DE	YouTube Premium HU
Disney+ SE	Hoichoi FR	MagellanTV IT	OCS GO FR	Wakanim DK	YouTube Premium IE
Filmstripen DK	Hoichoi HU	MagellanTV LT	Player PL	Wakanim FI	YouTube Premium IT
Filmtastic Amazon Channel DE	Hoichoi IE	MagellanTV LV	Ruutu FI	Wakanim FR	YouTube Premium PT
Fubo TV ES	Hoichoi IT	MagellanTV NL	SALTO FR	Wakanim SE	YouTube Premium SE
Go3 EE	Hoichoi LT	MagellanTV PL	SFR Play FR	WOW Presents Plus AT	
Go3 LT	Hoichoi LV	MagellanTV PT	Shudder DE	WOW Presents Plus BE	
Go3 LV	Hoichoi NL	MagellanTV RO	Shudder IE	WOW Presents Plus CZ	

Source: JustWatch data

More information:
www.obs.coe.int
Christian.Grece@coe.int
Marta.Jimenez-Pumares@coe.int

