



# Film and TV content in TVOD, SVOD and FOD catalogues 2024 data

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- A. Key findings
- B. Origin of unique work titles (film and TV seasons) titles in VOD catalogue
- C. Origin of works (films and TV seasons) in VOD catalogues
- D. Share EU national/EU non-national works (films and TV seasons)

## Annex

# Introduction

- The aim of this report is to provide an insight into the composition of **TVOD, SVOD and FOD catalogues in the 27 member states of the European Union** (hereafter EU27), looking at both film titles and TV seasons and their regions of origin.
- The report addresses **four research questions**:
  - What are the shares of film and TV season titles by region of origin in VOD catalogues, on a pan-European and country level?
  - What are the shares of films and TV seasons presences by region of origin in VOD catalogues, on a pan-European and country level?
  - What is the split of EU national and EU non-national films and TV seasons in VOD catalogues, on a pan-European and country level?
  - What are the differences by VOD services' business models in the composition of catalogues between SVOD, TVOD and FOD services?
- For film data, **216 TVOD catalogues, 794 SVOD catalogues and 118 FOD catalogues in 25 EU\* countries** were analysed based on JustWatch catalogue data. The data was collected in June 2024 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 season data, the analysis was based on JustWatch data from **148 TVOD catalogues, 431 SVOD catalogues and 95 FOD catalogues in 25 EU\*** countries. The data was collected in June 2024 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 under co-production agreements.
- **Four regions of origin are considered:** “EU27” titles have an EU27 country as first production country (with a split between **EU national** and **EU non-national** for presences). “**Other European**” titles have as a first production country a European country that is a member of the Council of Europe, “**US**” titles are from the United States of America and “**Non-US/non-European**” designates titles from all other origins.
- The shares included in this report are only indicative and minor identification errors might have occurred: About 1% of all titles are not identified and not included in the statistics presented in this report. Minor rounding adjustments in the shares by region of origin have been made.
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## Methodology: glossary

- **TVOD (Transaction Video On Demand)**: services where consumers can rent or purchase a work on a title-per-title basis.
- **SVOD (Subscription Video On Demand)**: services which propose for a monthly fee a catalogue of works available on demand.
- **FOD (Free Video on Demand)**: services which are mostly ad-supported and free to view for viewers; this includes AVOD services and broadcaster replay services.
- **VOD (Video On Demand)**: in the context of this report, all TVOD, SVOD and FOD services of the sample.
- **Catalogue**: the full list of titles made available by an SVOD, TVOD or FOD service. Each country catalogue of global services is accounted for separately.
- **Film**: all feature films, fiction films, documentaries or other content available in the “Film” / “Movie” section of the TVOD, SVOD and FOD catalogue are considered.
- **TV season**: all content classified as “TV” in TVOD, SVOD and FOD catalogues is considered.
- **Unique titles – Film titles and TV season titles**: different titles present at least once in at least one catalogue. The number of presences is not considered. Titles available in TVOD, FOD and in SVOD are de-duplicated when considering all TVOD, FOD and SVOD catalogues.
- **Presences - Films and TV seasons**: sum of presences in VOD catalogues for each different title. Each individual presence of a title in a VOD catalogue or country are taken into account.

## A - Key findings

# A – Key findings (1/4)

## A very diversified and large offer of different film and TV season titles exploited on VOD services in the EU<sup>(1)</sup>

- 185 960 different film and TV season titles were exploited on VOD in June 2024. However, there are differences between the different types of VOD services and between the different types of works:
  - Films are mainly exploited on TVOD and on SVOD.
  - TV content is mainly exploited on SVOD.
  - FOD is still in its infancy and therefore plays a more limited role in the exploitation of works.
- As regards the origin of the works in exploitation, EU27 works accounted for 34% and other European titles, mainly produced in the United Kingdom, accounted for 12%, giving a total share of European works of 46% of all films and TV season titles exploited on VOD.

## When considering the actual presence in catalogues<sup>(2)</sup>, the share of EU27 works is significantly lower (22%)

- As TV series are counted by number of seasons<sup>(3)</sup>, films account for a massive 84% of the presence of all types of works on VOD.
- While the EU27 accounted for 34% of all different titles exploited on VOD, it represented only 22% of the presences<sup>(2)</sup> as each EU27 title was present in fewer catalogues than US titles. Works of other European origin, mainly produced in the United Kingdom, accounted for 10%, giving a total share of 32% of European works.

## The vast majority (more than 70%) of EU27 works were non-national works.

- When other European works are included, national works only accounted for only 19% of all European works available on VOD.

<sup>(1)</sup> Figures in this paragraph refer to "unique works". Any work available on VOD in at least in one service or country is counted as one. The figures reflect the structure of the portfolio of works in exploitation on VOD.

<sup>(2)</sup> Figures in this and the following paragraphs refer to presences. Each presence in one VOD catalogue is counted. These figures reflect the structure of the offer available to consumers.

<sup>(3)</sup> In accordance with the European Commission guidelines on the assessment of quotas for VOD services.

## A – Key findings (2/4)

### But there are differences between the different types of VOD services:

- Global SVOD services rely less on films (still 71% of presences) and more on TV series. They rely more on EU27 non-national works than on national works than TVOD and FOD and also more on works from outside Europe and the USA.
- TVOD services offer primarily films (95% of presences) and therefore, as regards EU27 films, mirror the cinema offer, relying more on national films than SVOD.
- FOD services, often managed by broadcasters, reach a higher proportion of EU27 works, with more national works and less non-national works than TVOD and SVOD.

### There are also differences between the different types of works:

- The share of EU27 works is much higher for films (23%) than for TV content (15%)<sup>(1)</sup>, while for TV content, the share of non-national EU27 content is much lower, especially for TVOD and FOD.

#### Origin of all works by region of origin

by business models, in shares of total presences

All works (in %)	SVoD	TVoD	FoD	All business models
EU national	4%	7%	12%	6%
EU non-national	18%	13%	15%	15%
<b>All EU</b>	<b>22%</b>	<b>21%</b>	<b>28%</b>	<b>22%</b>
Other European	9%	11%	9%	10%
<b>All Europe</b>	<b>31%</b>	<b>32%</b>	<b>36%</b>	<b>32%</b>
Non US/non-European	29%	12%	14%	19%
US	40%	56%	49%	49%

#### Origin of all works by region of origin

by type of works, in shares of total presences

All works (in %)	Films	TV seasons	All films and TV seasons
EU national	6%	6%	6%
EU non-national	17%	9%	15%
<b>All EU</b>	<b>23%</b>	<b>15%</b>	<b>22%</b>
Other European	10%	11%	10%
<b>All Europe</b>	<b>33%</b>	<b>26%</b>	<b>32%</b>
Non US/non-European	18%	26%	19%
US	49%	48%	49%

Source: JustWatch catalogue data

<sup>(1)</sup> The share of EU27 works in catalogues would therefore be lower should episodes and not seasons be considered.



## A – Key findings (3/4)

### The share of EU works in VOD catalogues varied widely between EU countries

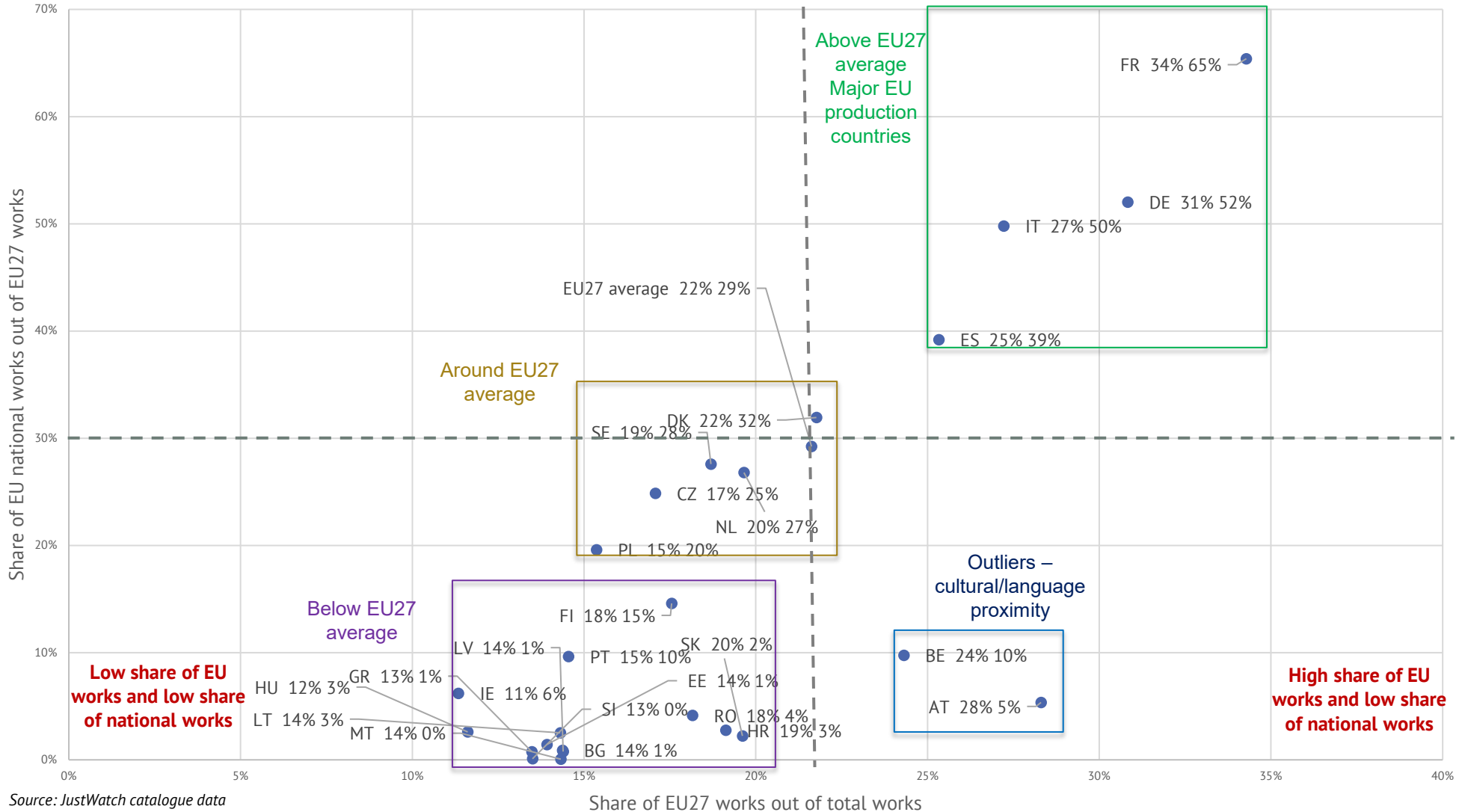
- The graph on the next slide shows a clustering of EU27 countries based on, on the one hand, the share of EU27 works in catalogues and, on the other hand, the share of national works in EU27 works. It shows four main groups of countries:
  - Four **major audiovisual production countries** had a high share of national and therefore of EU works: France, Germany, Italy and Spain.
  - Five countries with **well-developed audiovisual industries** had shares of national and EU works around the EU average: Denmark, Czechia, Poland, the Netherlands and Sweden).
  - Fourteen countries with **less developed audiovisual industries** had low proportions of national and EU works: Bulgaria, Estonia, Finland, Greece, Croatia, Hungary, Ireland, Lithuania, Latvia, Malta, Portugal, Romania, Slovenia and Slovakia).
  - Two **outliers**, had a low share of national works and an above-average share of non-national EU works, mainly produced in culturally close neighbouring countries sharing a common language: Austria and Belgium.

# A – Key findings (4/4)

**Low share of EU works and high share of national works**

Share of EU27 works and share of national works out of EU27 works in VOD catalogues by country in shares of total works and shares of EU27 works

**High share of EU works and high share of national works**



### Origin of unique work titles in VOD catalogues

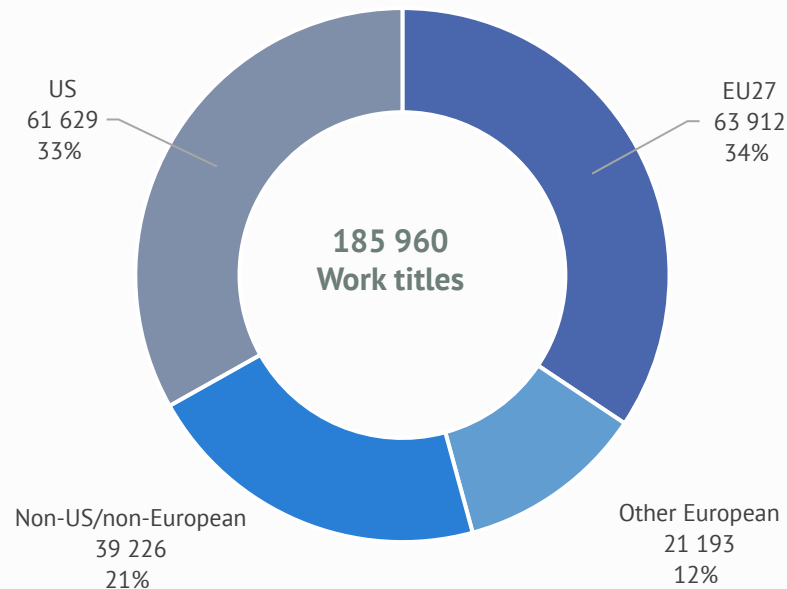
- This section deals with **unique work titles (all work titles, film titles, TV season titles)**, i.e. work titles which were available at least once in any VOD catalogue.
- For pan-European data, the number of countries and catalogues in which the work title was present is not taken into account.
- For country-level data, the number of catalogues in which the work title was present in the country is not taken into account.

## B – Origin of unique work titles in VOD catalogues

Over 34% of all unique works available were of EU27 origin, 33% of US origin

- With over 63 900 titles, EU27 film and TV season titles represented the largest share of unique work titles available on VOD in 25 EU27 countries, slightly more than US titles with 33% of all available work titles.
- Titles of other European origin, mainly from the United Kingdom, accounted for 12% for a total share of unique work titles of European origin of 46%.
- Non-US/non-European work titles represented 21% with more than 39 200 work titles.

Origin of unique work titles (film and TV season) by region of origin  
All 25 EU27 countries, all business models, in number of unique work titles available



Less than 1% of all film titles could not be identified.

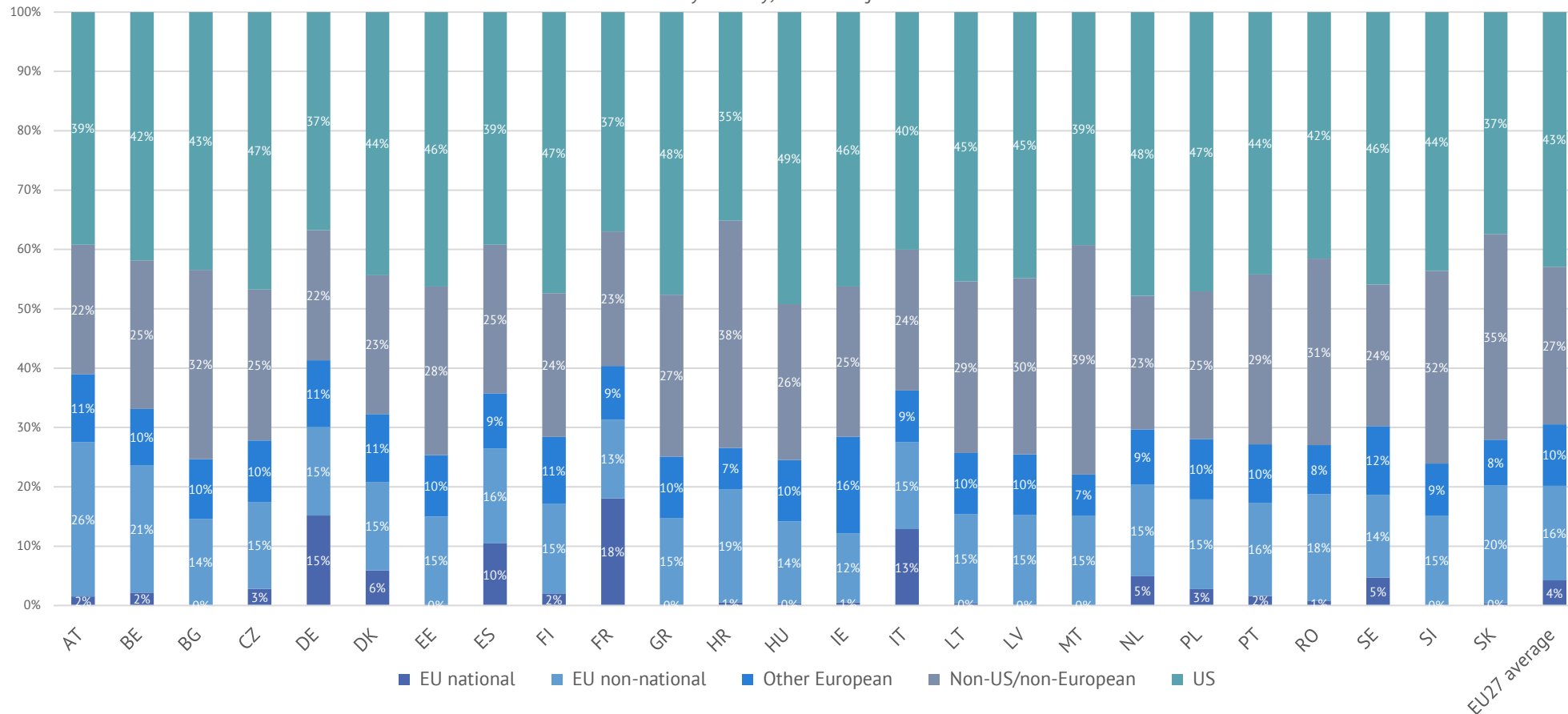
Source: JustWatch catalogue data

# B – Origin of unique work titles in VOD catalogues

On a country level, between 12% and 31% of work titles available were produced in EU27

- EU27 titles accounted for 31% of all titles in FR, 30% in DE, 28% in AT and IT while representing less than 15% of all titles in 9 countries (LT, LV, MT, SI, EE, GR, BG, HU and IE).
- The highest share of EU national titles were found in FR, DE, IT and ES and the lowest in GR, SI, MT.
- AT, BE and SK had the highest share of EU non-national titles, with titles from cultural close neighbours made available on VOD services while HU, FR and IE had the lowest share: in HU, US titles are above average, in FR national titles and in IE other European titles (mostly from the UK).

Origin of unique work titles (film and TV seasons) by region of origin  
By country, in share of total

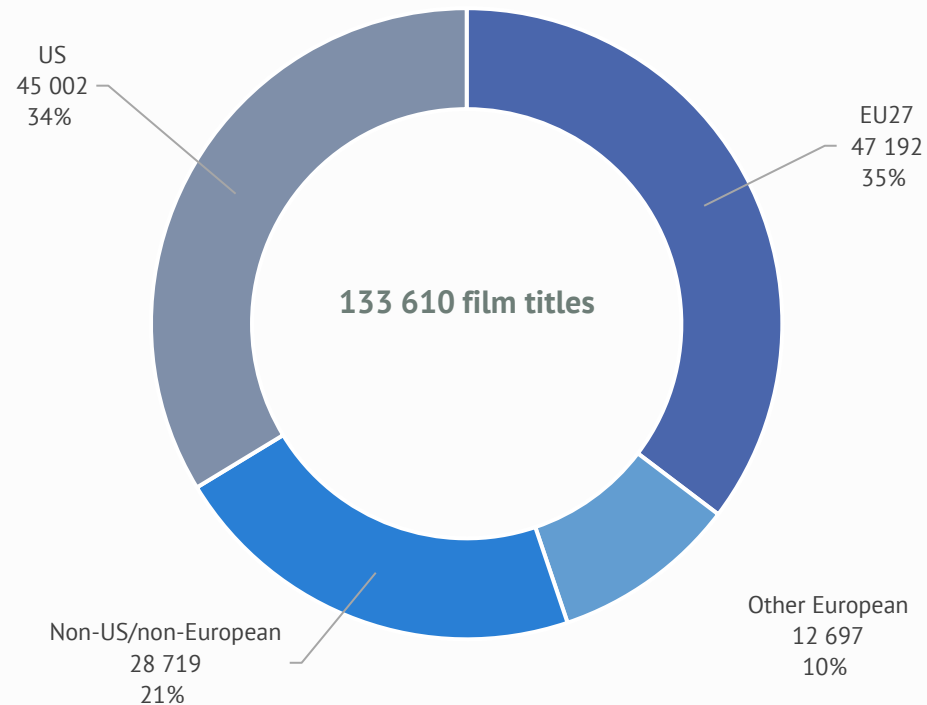


## B – Origin of unique work titles in VOD catalogues – Unique film titles

### 45% of all unique film titles available in VOD catalogues are of European origin

- Out of the 133 610 different film titles available, 45% were of European origin with EU27 film titles accounting 35% and other European titles 10%, mainly from the UK.
- US film titles, with 45 000 titles available, represented 34% in of all film titles available in VOD catalogues in 25 EU27 countries.
- Non-US/non-European film titles accounted for 21%, with film titles produced in 5 countries (India, Canada, Japan, Australia and China) representing 2/3 of these international film titles.

Origin of unique film titles by region of origin  
all 25 EU27 countries, all business models, in number of unique film titles

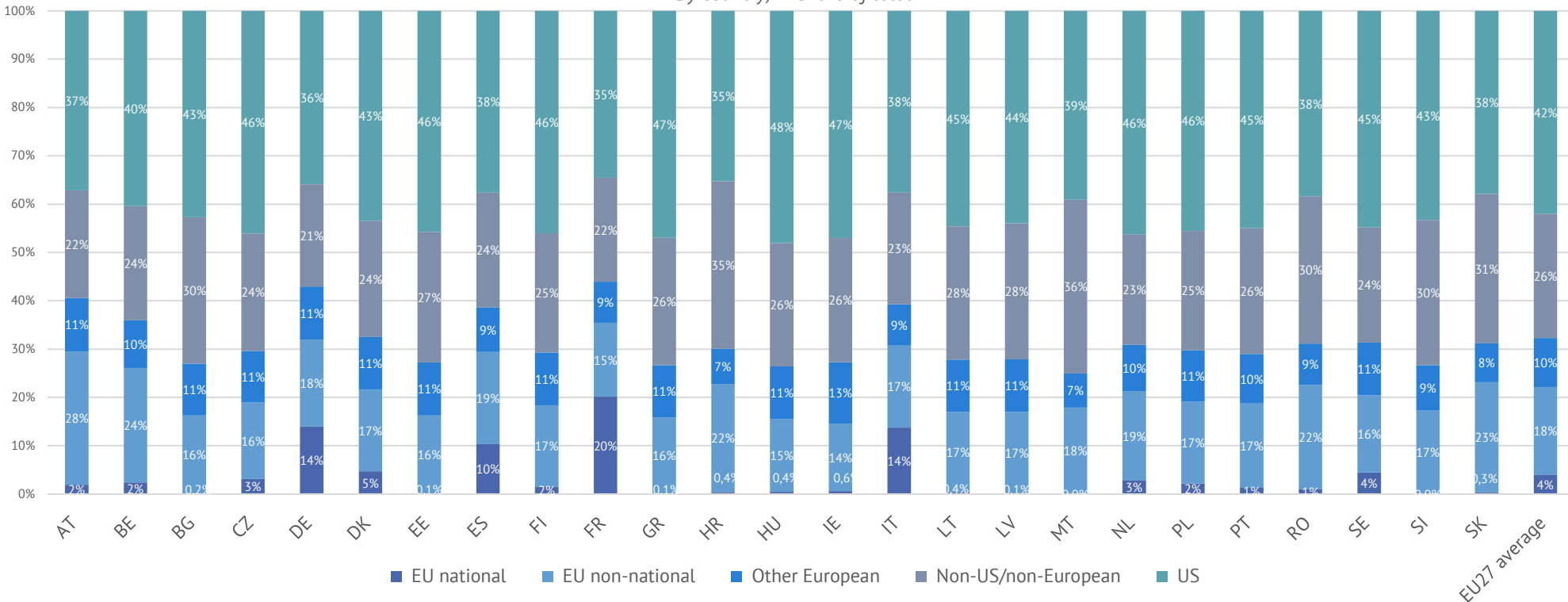


## B – Origin of unique work titles in VOD catalogues – Unique film titles by country

On a country level, an average of 22% film titles available on VOD are of EU27 origin

- The highest shares of EU27 film titles were achieved in countries with a high share of national film titles: 35% of EU27 film titles in FR, 32% in DE, 31% in IT and 29% in ES, all with above average shares of national film titles.
- In AT and BE, with 30% and 26% of EU27 film titles, EU non-national titles from DE and FR, NL helped to raise the share of EU27 film titles available.
- A low share of national film titles available in IE, HU, GR, placed these countries at the bottom for the share of EU27 film titles available with 16.5% or less. Conversely, these countries also had the highest share of US film titles with more than 47% of all titles.
- All 10 countries (MT, HR, SK, RO, BG, SI, LV, LT, EE, GR) with a share of non-US/non-European film titles above 26% had a share of EU national films of 1% or less.

Origin of unique film titles by region of origin  
By country, in share of total

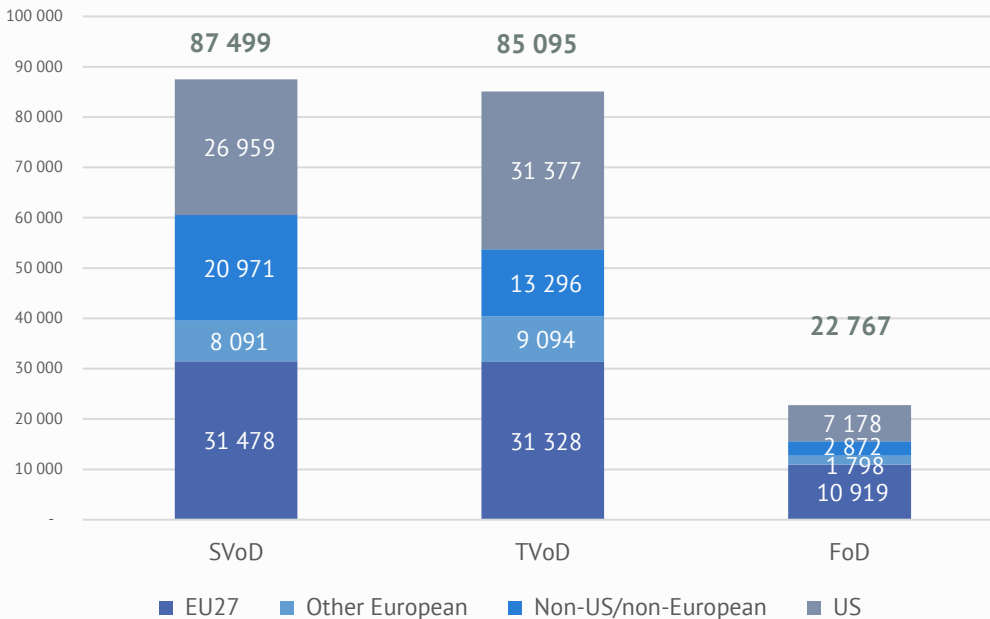


## B – Origin of unique work titles in VOD catalogues – Unique film titles by business model

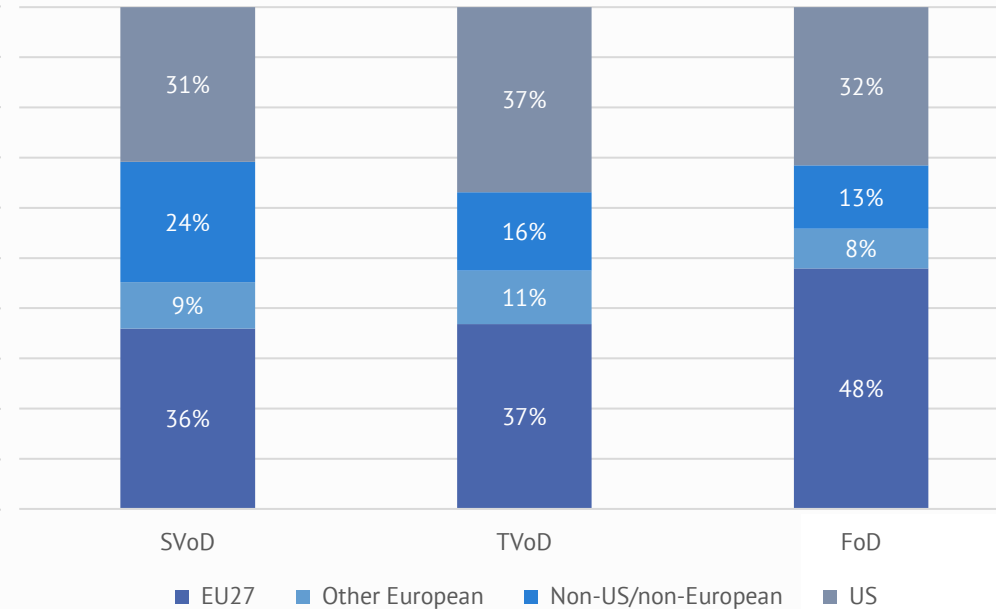
Much more films available on SVOD and TVOD than on FOD; SVOD offers more non-US/non-European films

- With over 85 000 different film titles available on SVOD (794 catalogues in the sample in 25 EU27 countries) and TVOD (216 catalogues), much more film titles were available than on FOD (118 catalogues).
- On SVOD, the film offering appeared to be more diverse, with 24% of film titles of non-US/non-European origin, much higher than in catalogues of other business models. European film titles represented 45%, the lowest share of all 3 business models.
- On TVOD, US and other European (mainly from the UK) film titles had the highest share of all 3 business models with 37% and 11% of titles available.
- On FOD, EU27 accounted for 48% of all titles helped by the presence of several replay services of national broadcasters in the sample. The relative low number of titles available shows that FOD services in the sample are not primarily destinations for film viewing.

Origin of unique film titles by region of origin by business model  
all 25 EU27 countries, in numbers



Origin of unique film titles by region of origin by business model  
all 25 EU27 countries, in shares of total



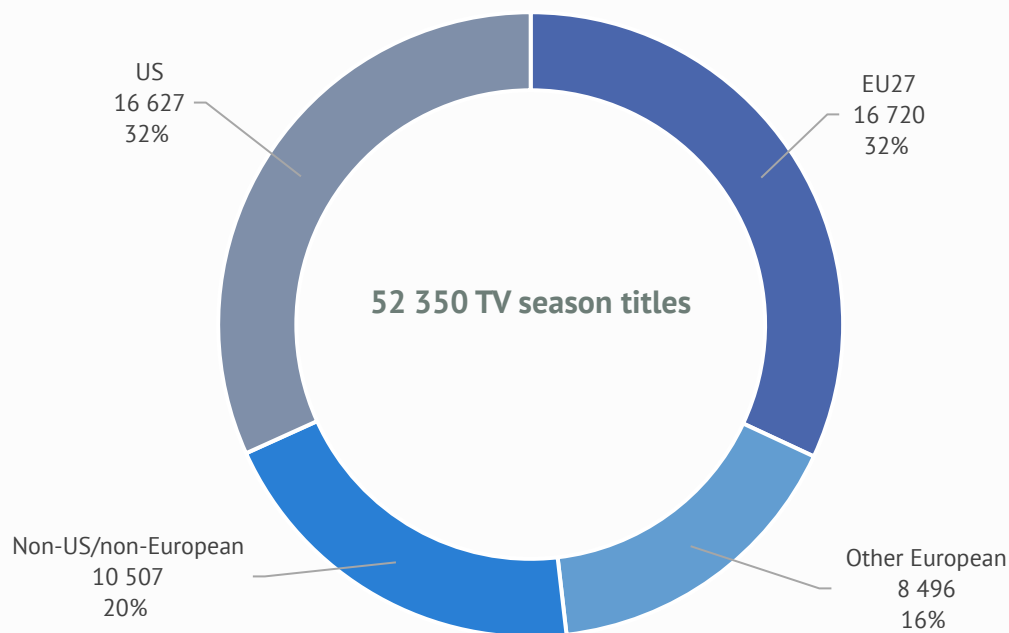


## B – Origin of unique work titles in VOD catalogues – Unique TV season titles

48% of all unique TV season titles available on VOD are of European origin, 32% of US origin

- With 16 720 different EU27 TV season titles (32%) and 8 496 other European TV seasons titles, European TV season titles represented 48% of the 52 650 different TV season titles that were available on VOD in 25 EU27 countries.
- US TV season titles accounted for 32% (the same share as EU27 titles).
- Non-US/non-European TV season titles represented 20% of all TV season titles available.

Origin of unique TV season titles by region of origin  
all 25 EU27 countries, all business models, in number of unique TV season titles

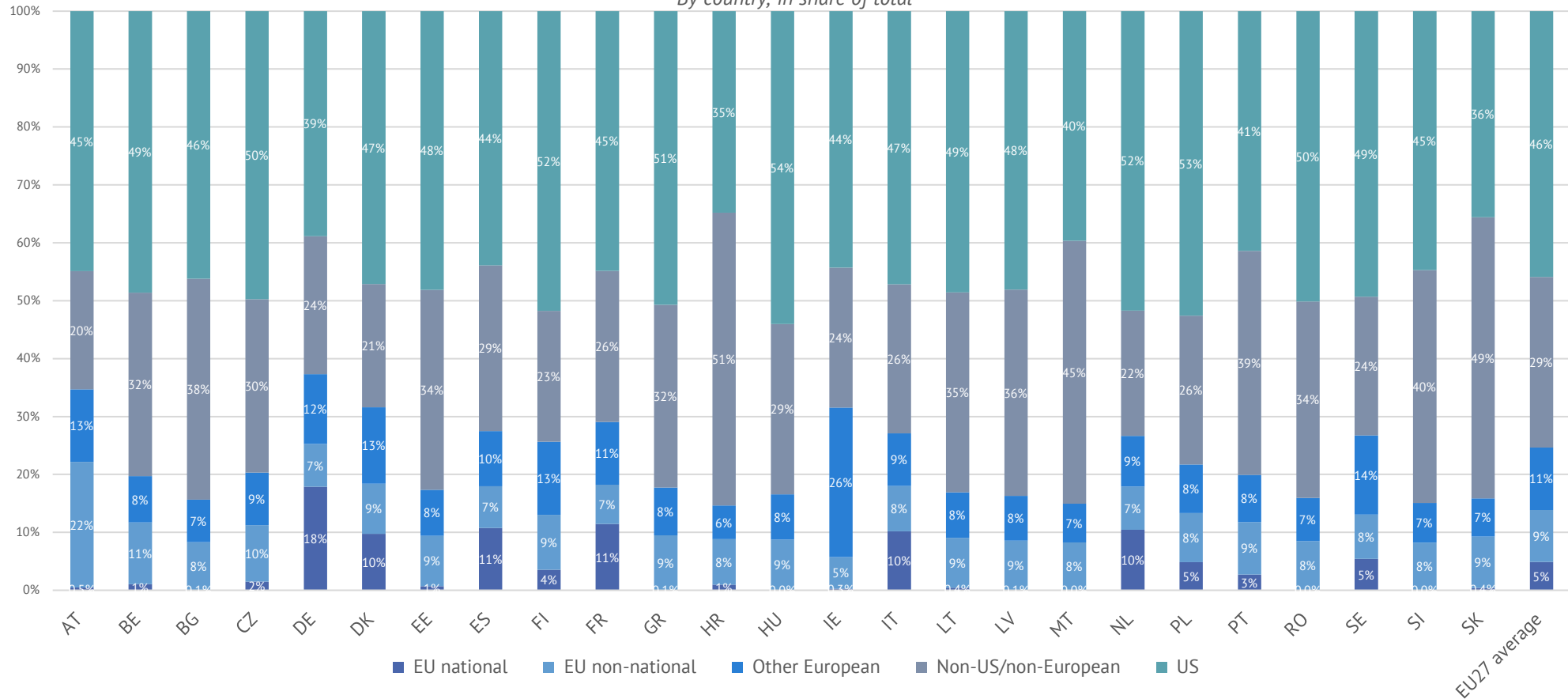


# B – Origin of unique work titles in VOD catalogues – Unique TV season titles by country

On a country-level, between 15% and 37% of all TV season titles were of European origin

- The highest shares of European TV season titles were found in DE (37%), AT (35%), DK (32%), IE (32% and FR (29%) while the lowest shares were present in SI, MT and HR (15%).
- The highest share of EU27 TV season titles (18% and above) were all found in 7 countries with shares of national TV season titles above 10% (DE, DK, FR, IT, ES, NL) and AT in which the highest share of EU non-national TV season titles was found with 22% (more than double the share than the second country, BE with a share of 11% for EU non-national TV titles).
- 7 countries (HU, PL, FI, NL, GR, RO, CZ) had a share of US TV season titles of above 50% and HR had a share of non-US/non-European titles above 50%.

Origin of unique TV season titles by region of origin  
By country, in share of total

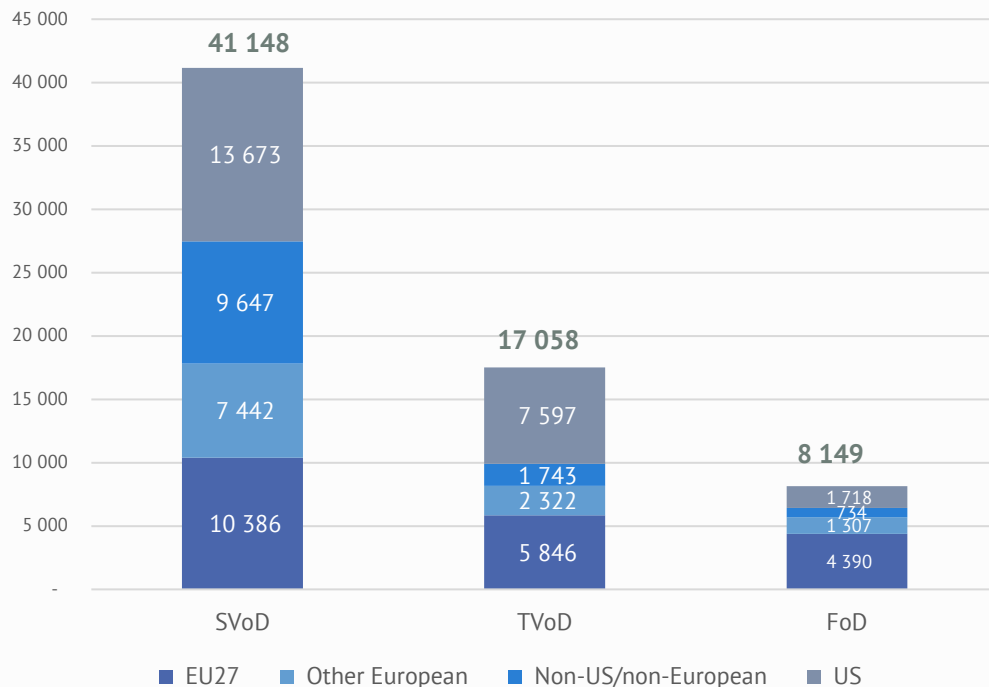


# B – Origin of unique work titles in VOD catalogues – Unique TV season titles by business model

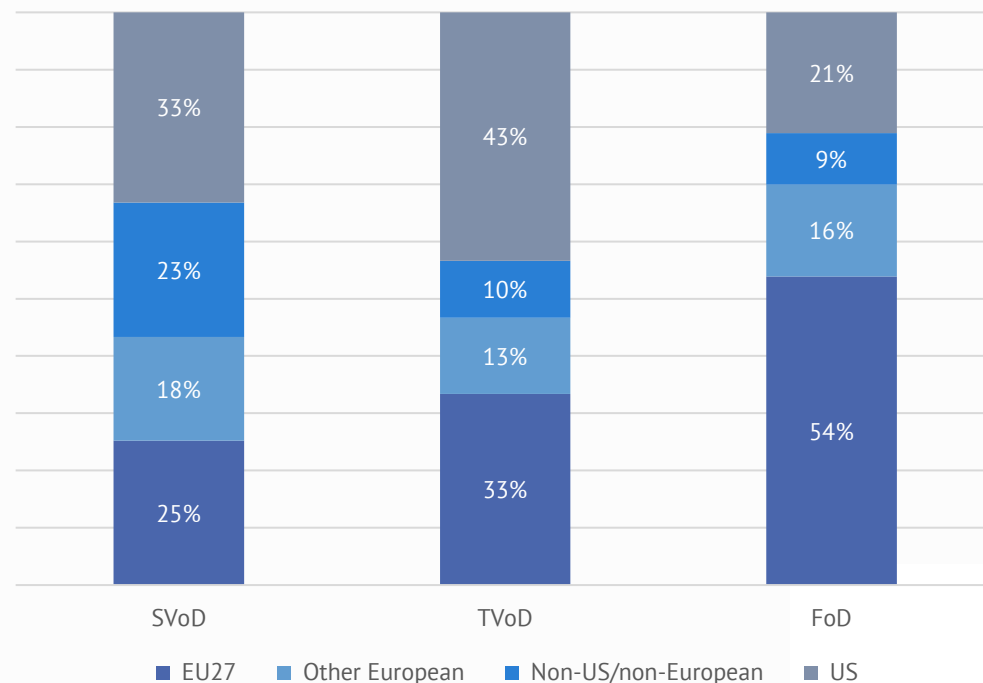
Very diverse TV offering on SVOD, more European-influenced offering on FOD and US-tinged on TVOD

- SVOD services offered the largest amount of different TV season titles with more than 41 100 (431 SVOD catalogues in the sample), followed by TVOD services with over 17 000 titles (148 catalogues) and FOD services with just over 8 100 titles (95 catalogues).
- On FOD, EU27 TV season titles accounted for the largest share with 54% of all titles available.
- On SVOD, the offering was diverse with around with titles of US accounting for 1/3 of all TV season titles and EU27 titles ¼. TV season titles of non-US/non-European origin made up 23%, the largest share of the three business models, showing the increased importance of international titles for SVOD services.
- On TVOD, US titles represented 43% followed by EU27 titles with 33%.

Origin of unique TV season titles by region of origin by business model  
all 25 EU27 countries, in numbers



Origin of unique TV season titles by region of origin by business model  
all 25 EU27 countries, in share of total



### Origin of works in VOD catalogues

- This section deals with **presences of works (all works, films, TV seasons)**, the number of countries and catalogues in which the work was present is taken into account.
- For pan-European data, the number of countries and catalogues in which the work was present is taken into account.
- For country-level data, the number of catalogues in which the work title was present in the country is taken into account.

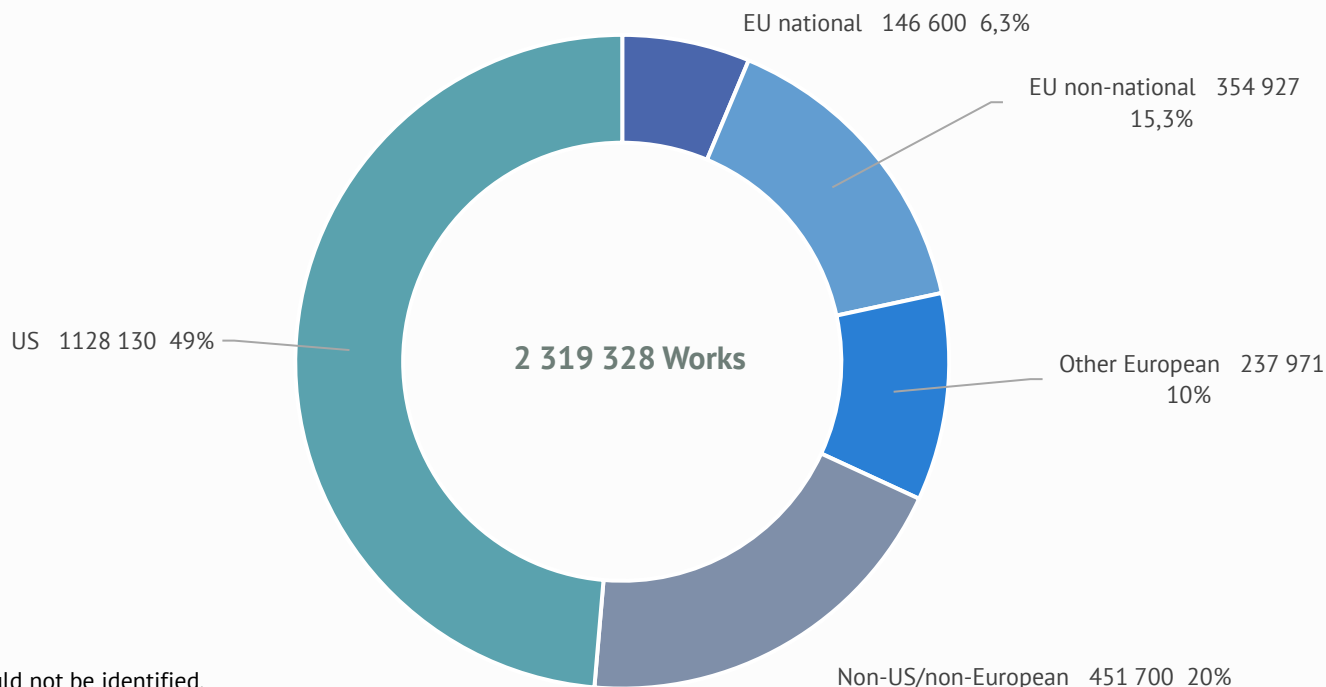
### Origin of works in VOD catalogues: all works

## C – Origin of works in VOD catalogues – All works

31% of all works available on VOD are of an European origin and 22% of EU27 region

- EU27 works, with more than 501 000 presences in 1 128 VOD catalogues in the 25 countries, represented 22% of all available works (films and TV seasons). The majority of EU27 works were EU non-national works with 15.3% and national works making up 6.3% of works in VOD catalogues.
- Works of other European origin accounted for 10% of all presences in catalogues and non-US/non-European works made up 20% with more than 451 000 films and TV seasons present.
- US works accounted for almost half of the more than 2.3 million works present in VOD catalogues, with 1.1 million works or 49%.

Origin of works (films and TV seasons) by region of origin  
all 25 EU27 countries, all business models, in numbers and share of total works



Less than 2% of all works could not be identified.

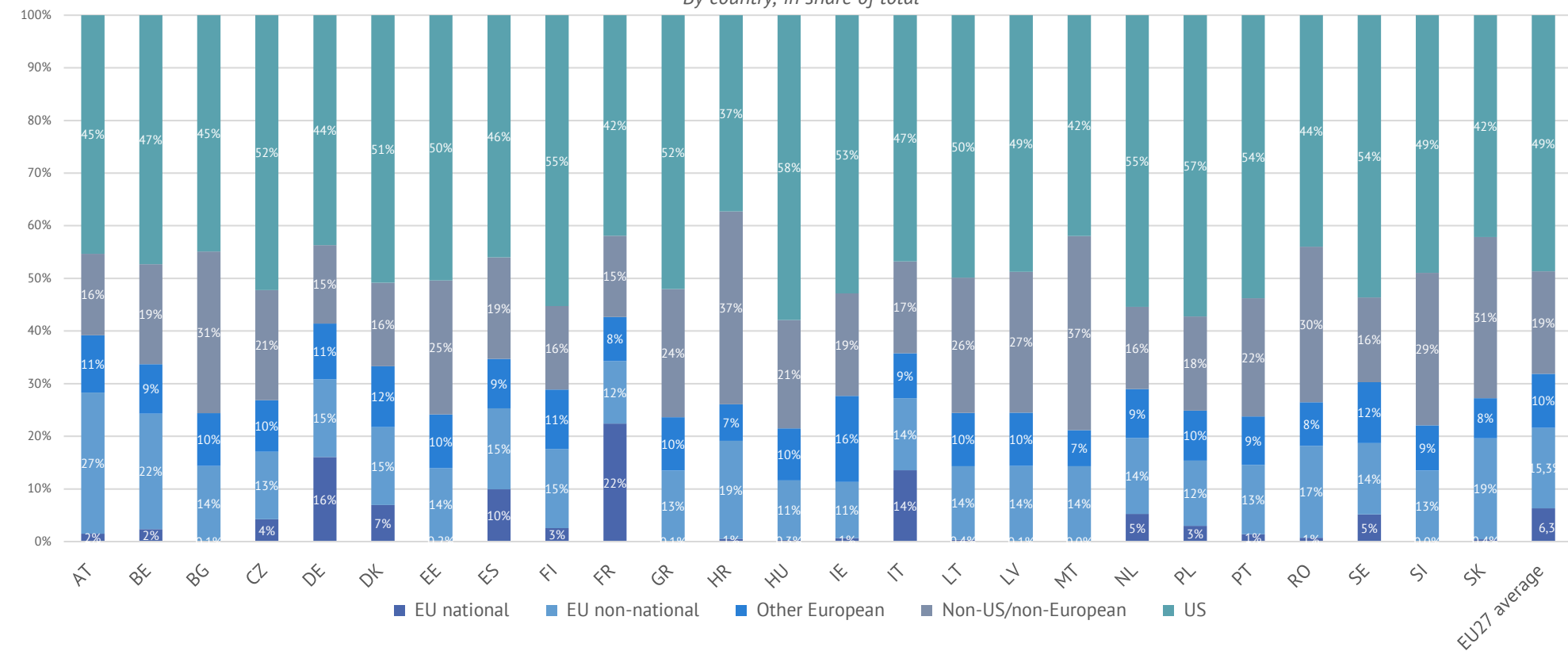
Source: JustWatch catalogue data

# C – Origin of works in VOD catalogues – All works by country

Between 28% to 43% of all works in VOD catalogues were of European origin, between 11% to 34% of an EU27 origin

- The highest shares of European works were found in VOD catalogues in FR (43%), DE (41%), AT (39%), IT (36%), ES (35%) and BE (34%) while the lowest shares were in MT (21%), HU (21%) and SI (22%).
- The share of EU27 works ranged from 11% in IE to 34% in FR. The countries with the highest shares of EU27 works (and thus European works) either had an above-average share of national works for major production countries (FR, DE, IT, ES), or an above-average share of EU non-national works (AT, BE) with works from cultural-close EU countries.
- 12 countries had a share of US works above 50% (HU, PL, NL, FI, PT, SE, IE, CZ, GR, DK, EE, LT).

Origin of works (films and TV seasons) by region of origin  
By country, in share of total



### Origin of works in VOD catalogues: films

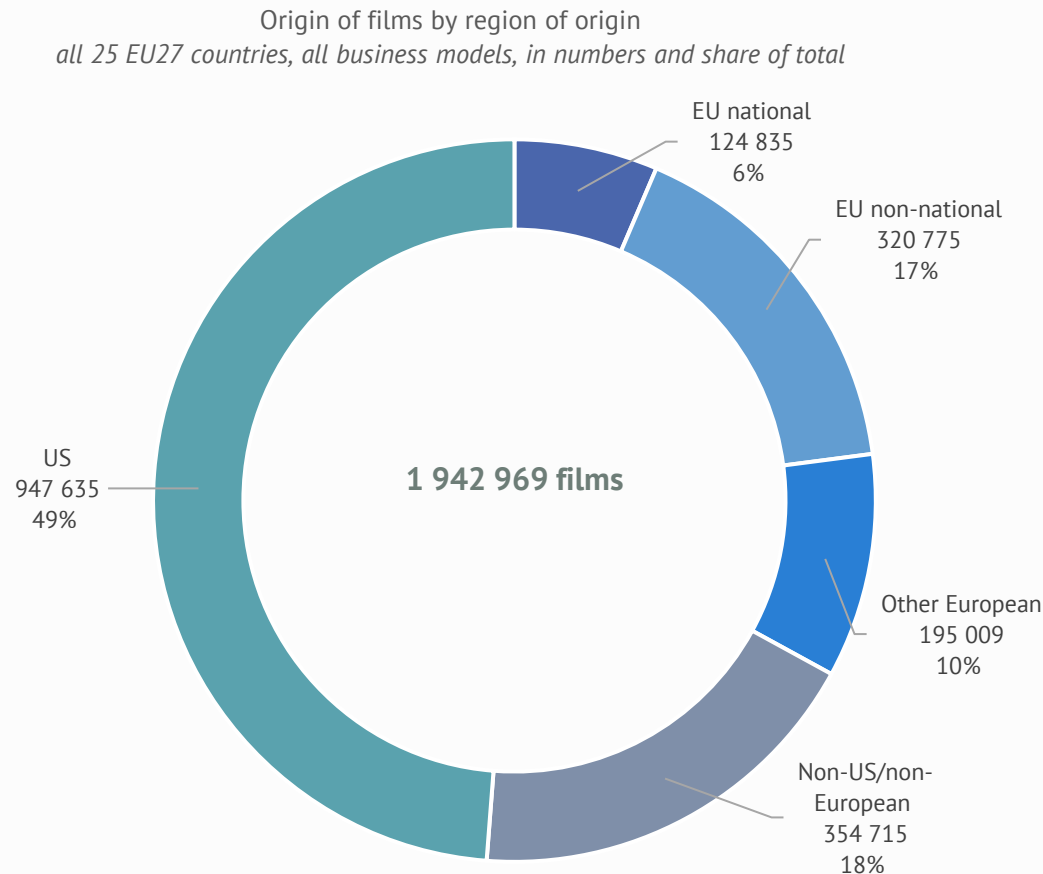
- This section deals with **presences of films**, the number of countries and catalogues in which the film was present is taken into account.
- For pan-European data, the number of countries and catalogues in which the film was present is taken into account.
- For country-level data, the number of catalogues in which the film was present in the country is taken into account.



## C – Origin of works in VOD catalogues - Films

23% of all films available on VOD were produced in the EU27 and 10% were of other European origins

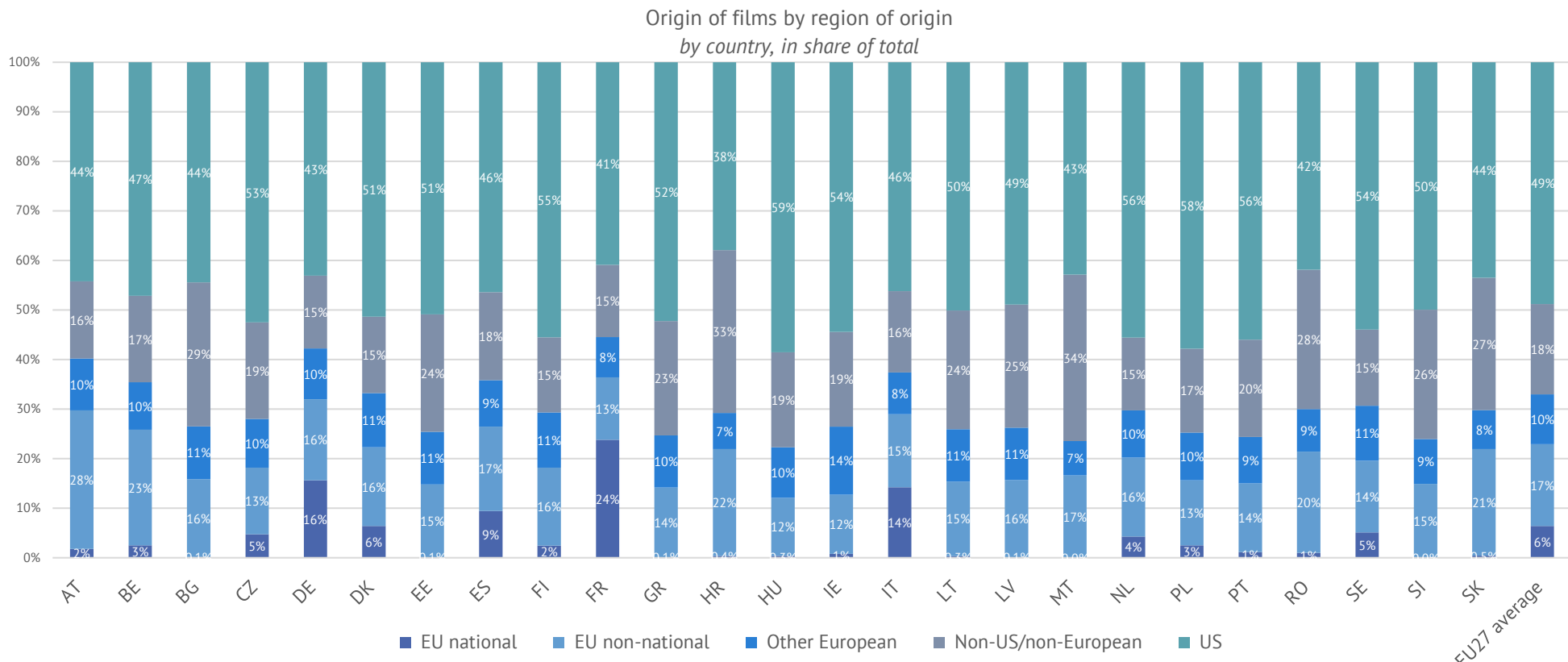
- Out of the more than 1.9 million films that were available in VOD catalogues in the 25 countries, 23% were of EU27 origin (with 6% of national origin and 17% of EU non-national origin). Additionally, 10% of films were produced in other European countries, which raised the share of European films to 33%.
- The lion share of films were represented by films produced in the USA with 49% or close to 1 million film presences in VOD catalogues.
- Non-US/non-European films accounted for 18% with more than 354 000 film presences in VOD catalogues.



# C – Origin of works in VOD catalogues – Films by country

On average, 33% of all films are of European origin, ranging from 22% in HU to 45% in FR

- The highest share of European films were in VOD catalogues in FR (45%), DE (42%), AT (40%), IT (37%), ES (36%) and BE (35%). The same explanation as for titles remains valid; major production countries benefit from a higher share of national films in VOD catalogues while the higher share of EU27 films in AT and BE originates in the presence of films from DE and FR/NL, respectively.
- The lowest share of European films were found in GR (25%), PT (24%), SI (24%), MT (24%) and HU (22%). These countries had also among the lowest shares of national films in VOD catalogues of the 25 countries.
- Only 5 countries had more than 20% of EU non-national films, AT (28%), BE (23%), HR (22%), SK (21%) and RO (20%).
- HU, PL, PT, NL and FI boosted the highest share of US films in VOD catalogues with more than 55% and MT, HR, BG, RO, SK had more than 27% of non-US/non-European films in VOD catalogues.

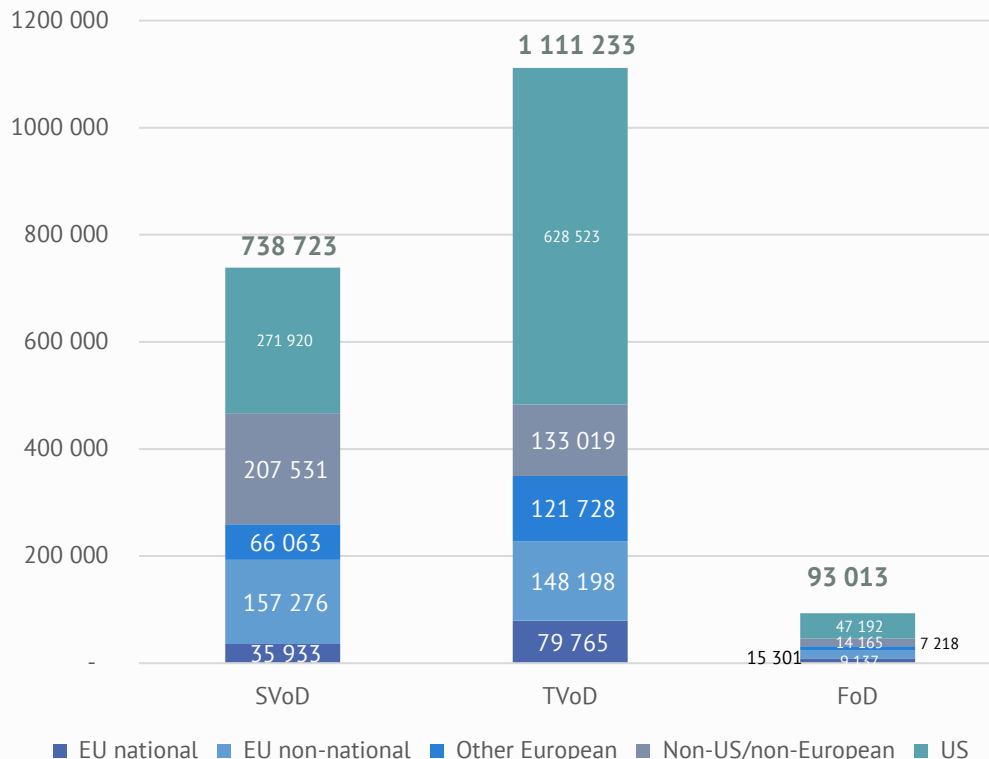


# C – Origin of works in VOD catalogues – Films by business model

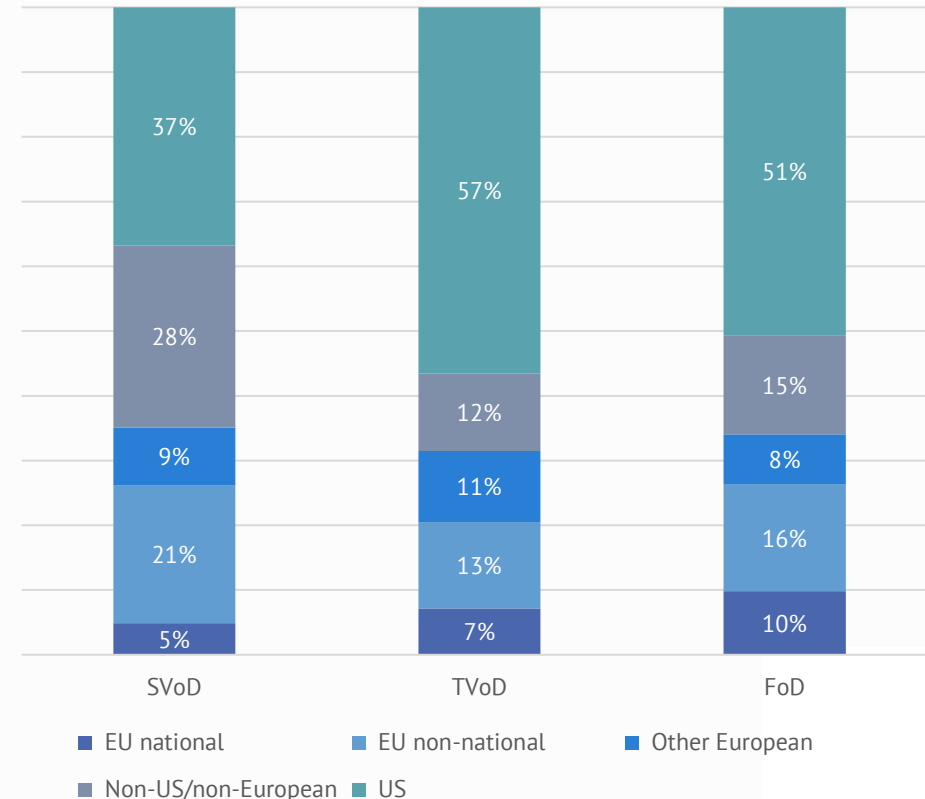
## More films of US origin on TVOD and FOD services, more diversity in SVOD catalogues

- US films had a share above 50% of all films available on TVOD and FOD services while their share was only 37% on SVOD services.
- This shows an increased reliance on non-US/non-European films by global SVOD players to complement catalogues, with a share of 28% of international films in SVOD catalogues (compared to only 12% and 15% in TVOD and FOD catalogues, respectively).
- EU27 films represented 26% on SVOD and FOD services and 20% on TVOD services.
- However, the share of national films was the lowest on SVOD services with 5%, followed by TVOD services with 7% and FOD services with 10%.
- Conversely, SVOD services had the highest share of EU non-national films with 21%, followed by FOD with 16% and TVOD with 13%.

Origin of films by region of origin by business model  
all 25 EU27 countries, in numbers



Origin of films by region of origin by business model  
all 25 EU27 countries, in shares of total

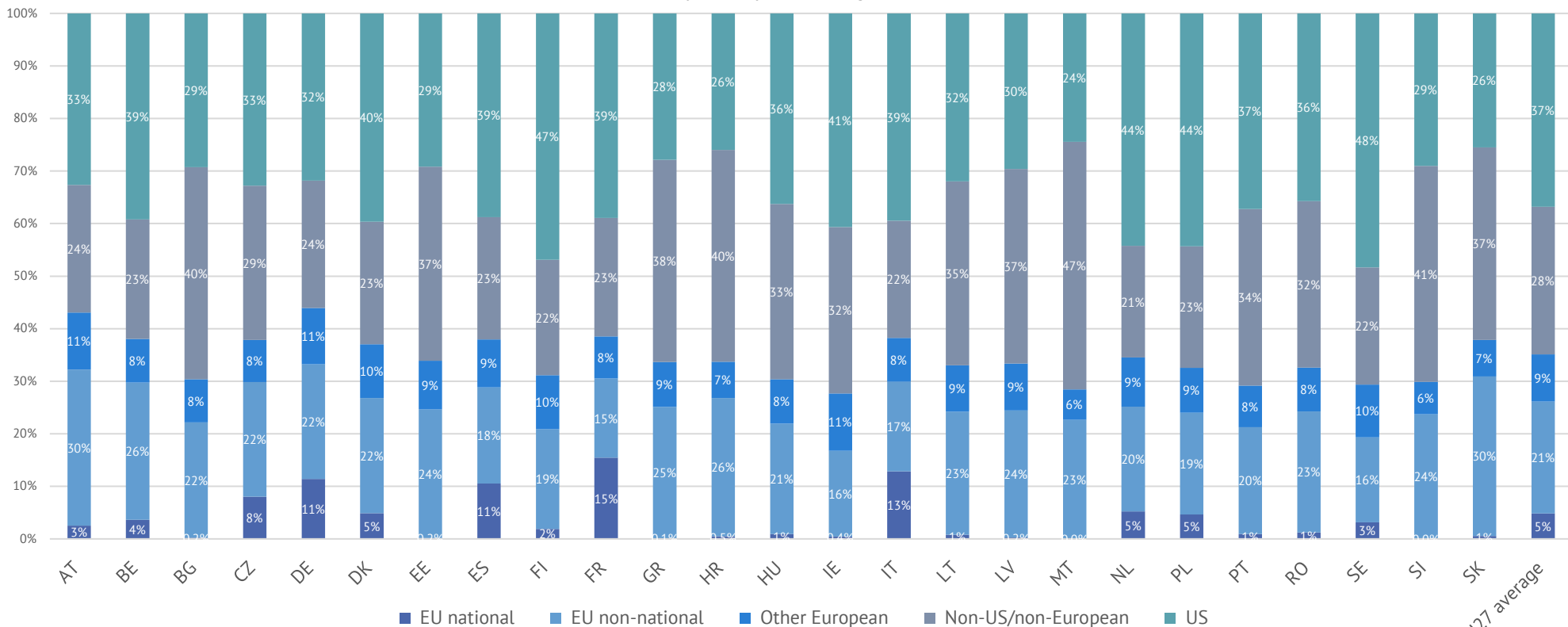


# C – Origin of works in VOD catalogues – Films on SVOD services by country

On average, 35% of all films are of European origin, ranging from 28% in IE to 44% in DE

- For EU27 films, the highest shares were reached in DE (33%), AT (32%), SK (31%), FR (31%), IT (30%), CZ (30%), BE (30%) and ES (29%) while the IE (17%), SE (19%), FI (21%) and PT (21%) had the lowest shares of the 25 countries.
- Major film production countries FR, IT, DE and ES all had a share of national films above 10% and GR, BE, HR, AT and SK had a share of EU non-national films above 25%.
- 6 countries had a share of US films of 40% or above, SE, FI, PL, NK, IE and DK and 4 countries MT, SI, BG, HR had a share of non-US/non-European films above 40%.

SVOD - Origin of films by region of origin  
by country, in share of total

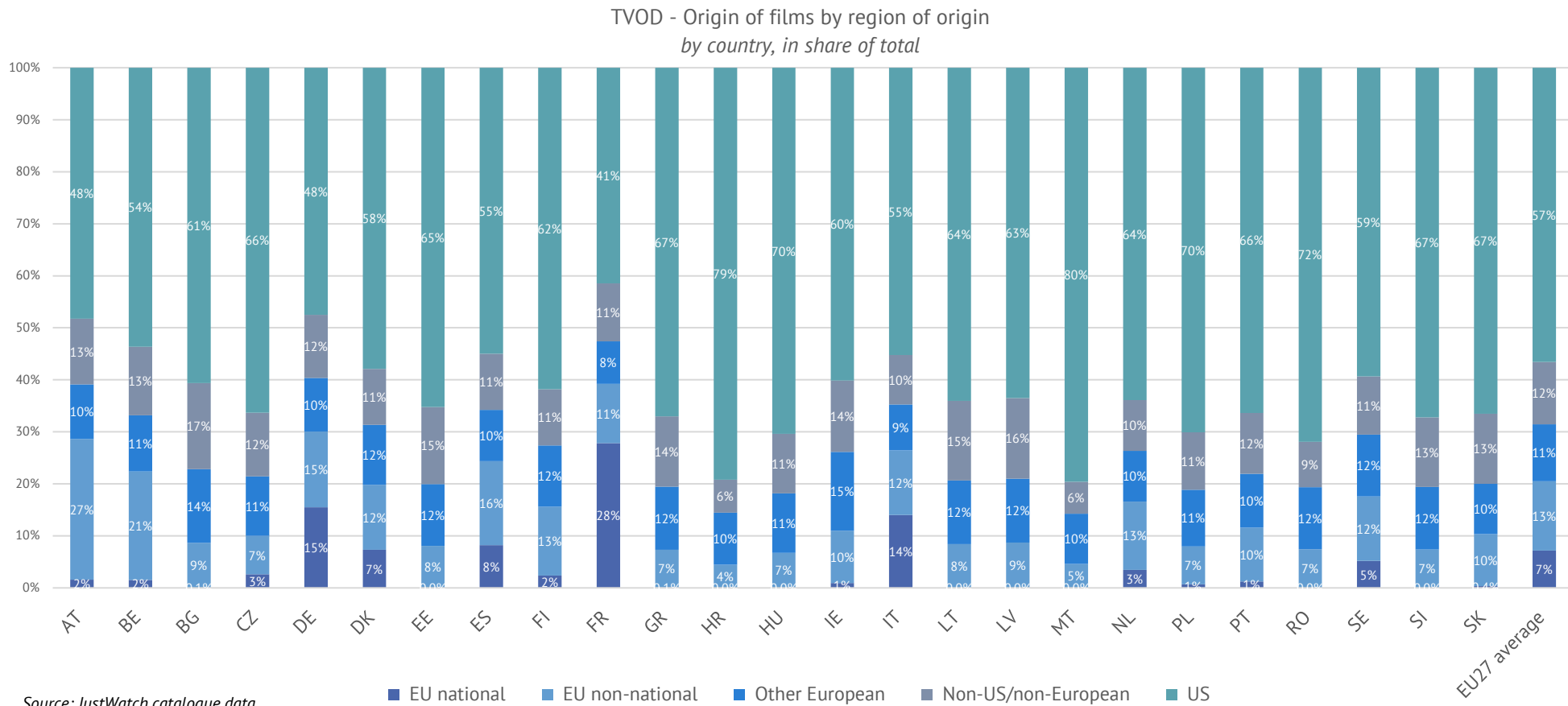


Source: JustWatch catalogue data

# C – Origin of works in VOD catalogues – Films on TVOD services by country

TVOD – on average, 31% of all films are of European origin, ranging from 14% in MT to 47% in FR

- The highest shares of EU27 films were found in TVOD catalogues in FR (39%), DE (30%), AT (29%), IT (26%) and ES (24%). The lowest shares were in HR (4%), MT (5%) and HU (7%).
- US films accounted for more than 50% in all countries except in FR, DE and AT where a higher share of national films or EU non-national films lowered slightly the share of US films compared to other countries.
- Non-US/non-European films represented between 6% in MT and HR and 17% in BG of all films available in TVOD catalogues.



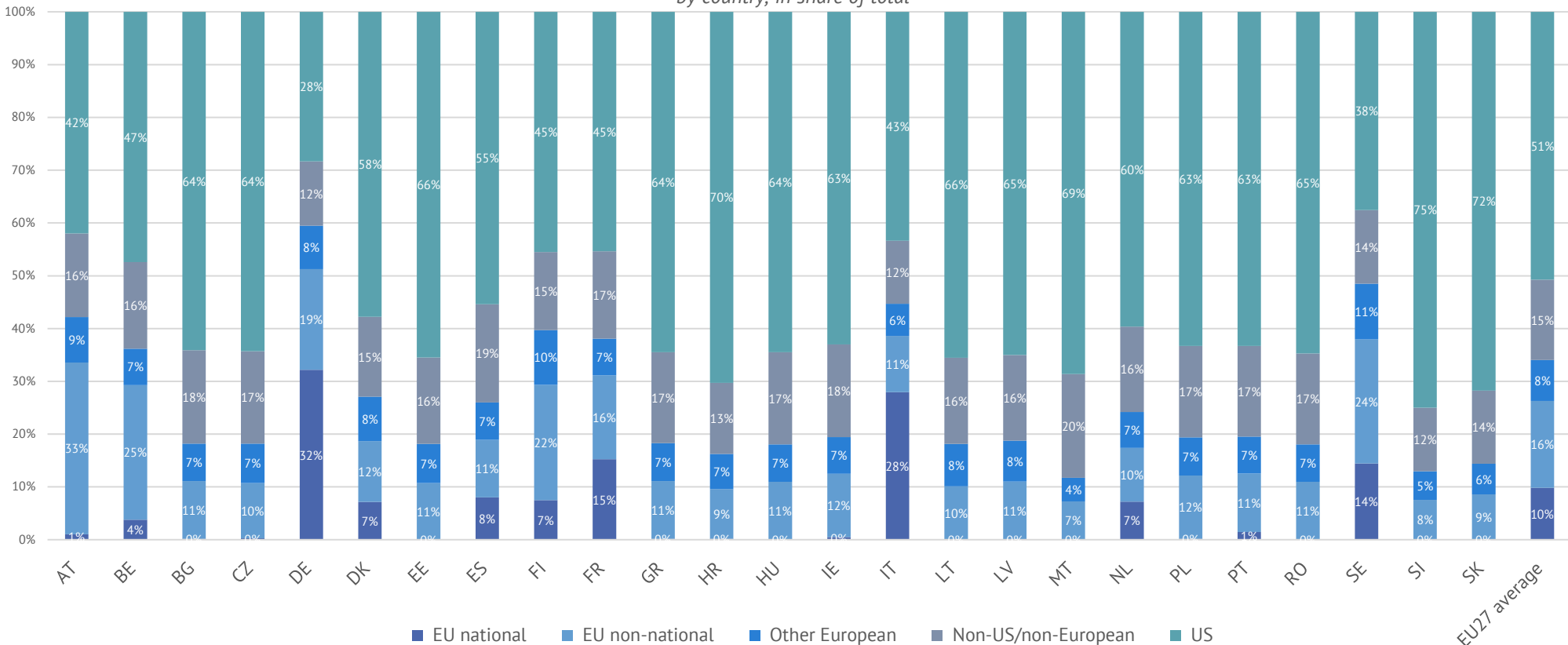
Source: JustWatch catalogue data

# C – Origin of works in VOD catalogues – Films on FOD services by country

FOD – on average, 34% of all films are of European origin, ranging from 12% in MT to 59% in DE

- The highest shares of EU27 films on FOD services were reached in DE (51%), IT (39%), SE (38%), AT (34%) and FR (31%), with FOD services of broadcasters boosting the share of national and EU non-national films.
- The lowest shares of EU27 films were in MT (7%), SI (8%) and SK (9%).
- The highest share of EU non-national films were found in AT (33%), BE (25%), SE (24%), FI (22%) and DE (19%).

FOD - Origin of films by region of origin  
by country, in share of total



### Origin of works in VOD catalogues: TV seasons

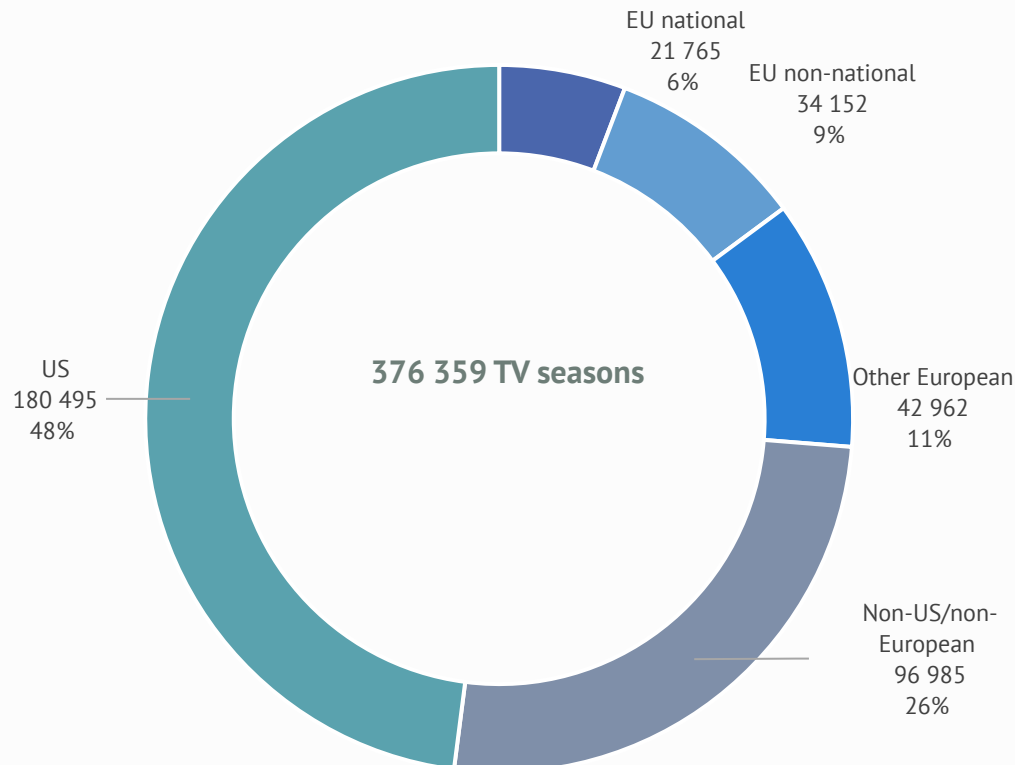
- This section deals with **presences of TV seasons**, the number of countries and catalogues in which the film was present is taken into account.
- For pan-European data, the number of countries and catalogues in which the TV season was present is taken into account.
- For country-level data, the number of catalogues in which the TV season was present in the country is taken into account.

## C – Origin of works in VOD catalogues – TV seasons

15% of all TV seasons available were produced in the EU27 and 11% were of other European origins

- With 6% of national TV seasons and 9% of EU non-national seasons, EU27 TV seasons accounted for 15%.
- Additionally, 11% of all TV seasons were produced in other European countries, putting the share of European TV seasons at 26% in the 25 countries on VOD.
- Non-US/non-European TV seasons also accounted for 26% of TV seasons available, mainly in SVOD catalogues.
- US TV seasons represented 48% of all TV seasons with over 180 000 TV seasons present in VOD catalogues.
- Roughly rounded up, the TV seasons offering on VOD in 25 EU countries was composed of half of US TV seasons and a quarter each of European and non-US/non-European TV seasons.

Origin of TV seasons by region of origin  
all 25 EU27 countries, all business models, in numbers and share of total



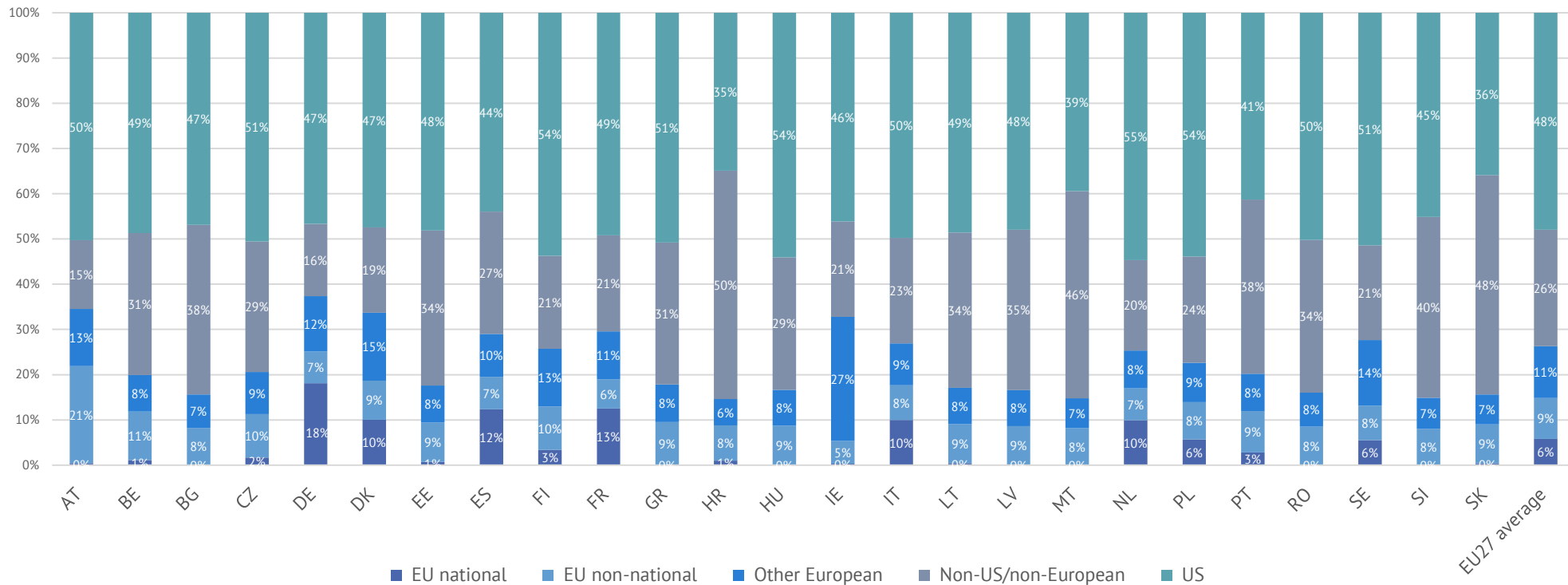


# C – Origin of works in VOD catalogues – TV seasons by country

On average, 26% of all TV seasons are of European origin, ranging from 15% in HR to 37% in DE

- The highest shares of EU27 TV seasons were found in DE (25%), AT (22%), ES (20%), FR (19%) and DK (19%). Except AT, these are also the countries with the highest share of national TV seasons and for AT the highest share of EU non-national TV seasons (21%).
- The lowest shares of EU27 TV seasons were found in RO, BG, MT, SI (8%) and IE (5%). In these countries, the share of non-US/non-European TV seasons was above the average and for IE, the share of other European TV seasons.
- The highest share of US TV seasons were found in NL (55%), HU, PL and FI (54%).

Origin of TV seasons by region of origin  
by country, in share of total

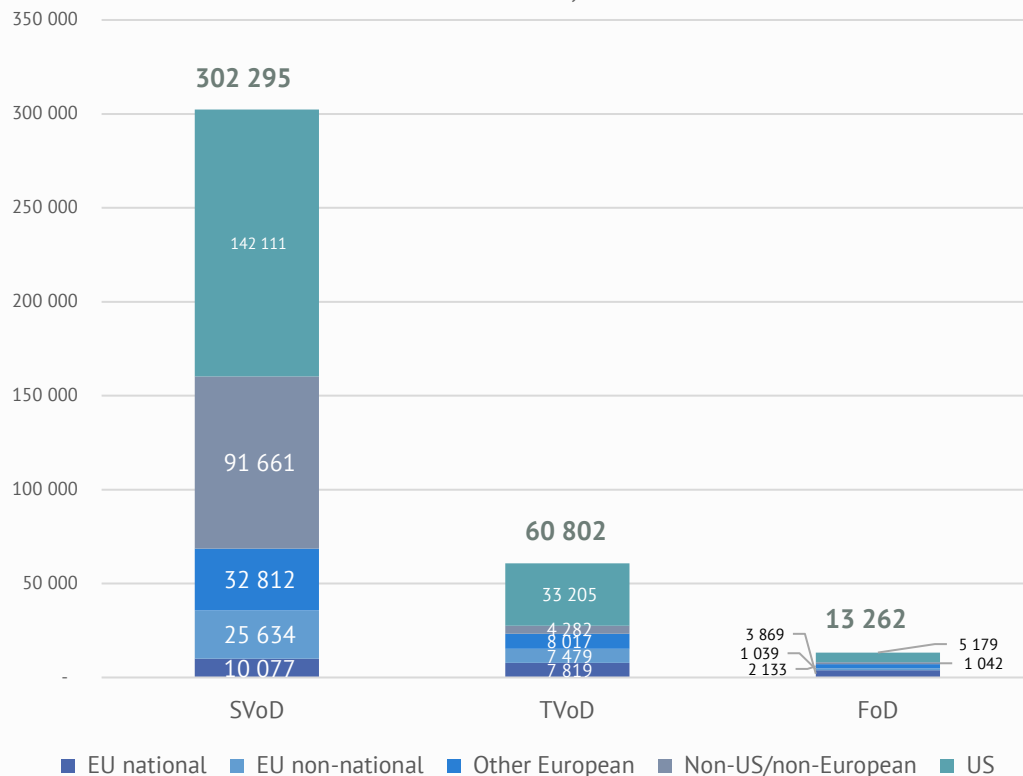


# C – Origin of works in VOD catalogues – TV seasons by business model

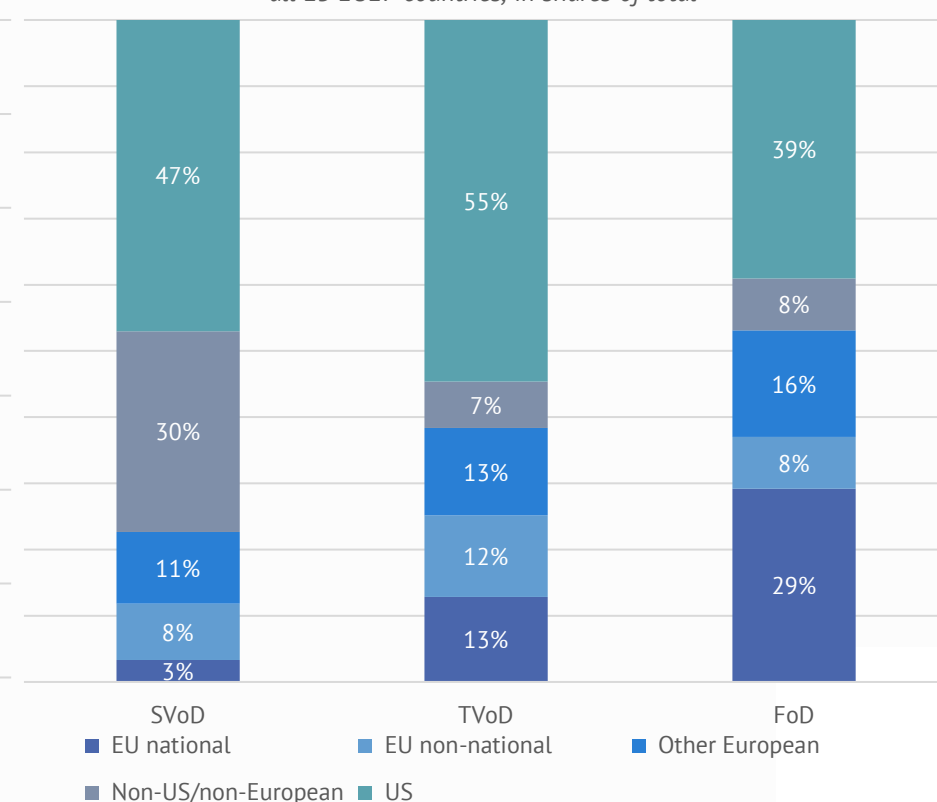
## A much larger and diverse TV seasons offering on SVOD services than on TVOD and FOD services

- With over 300 000 TV seasons, the offering on SVOD was much larger than on TVOD and FOD.
- EU27 TV seasons represented only 11% of all seasons on SVOD but 25% on TVOD and 37% on FOD.
- The share of national TV seasons in the catalogues was also much higher on FOD and TVOD than on SVOD, as FOD and TVOD services tend to adapt their TV offering more to their national audience whereas global SVOD players tend to establish pan-European catalogues, marginally adapted to local audiences.
- On SVOD, the share of non-US/non-European TV seasons was much higher than on TVOD and FOD demonstrating the increased importance of TV content produced in other world regions than Europe and the USA in the content offering of global SVOD players.

Origin of TV seasons by region of origin by business model  
all 25 EU27 countries, in numbers



Origin of TV seasons by region of origin by business model  
all 25 EU27 countries, in shares of total

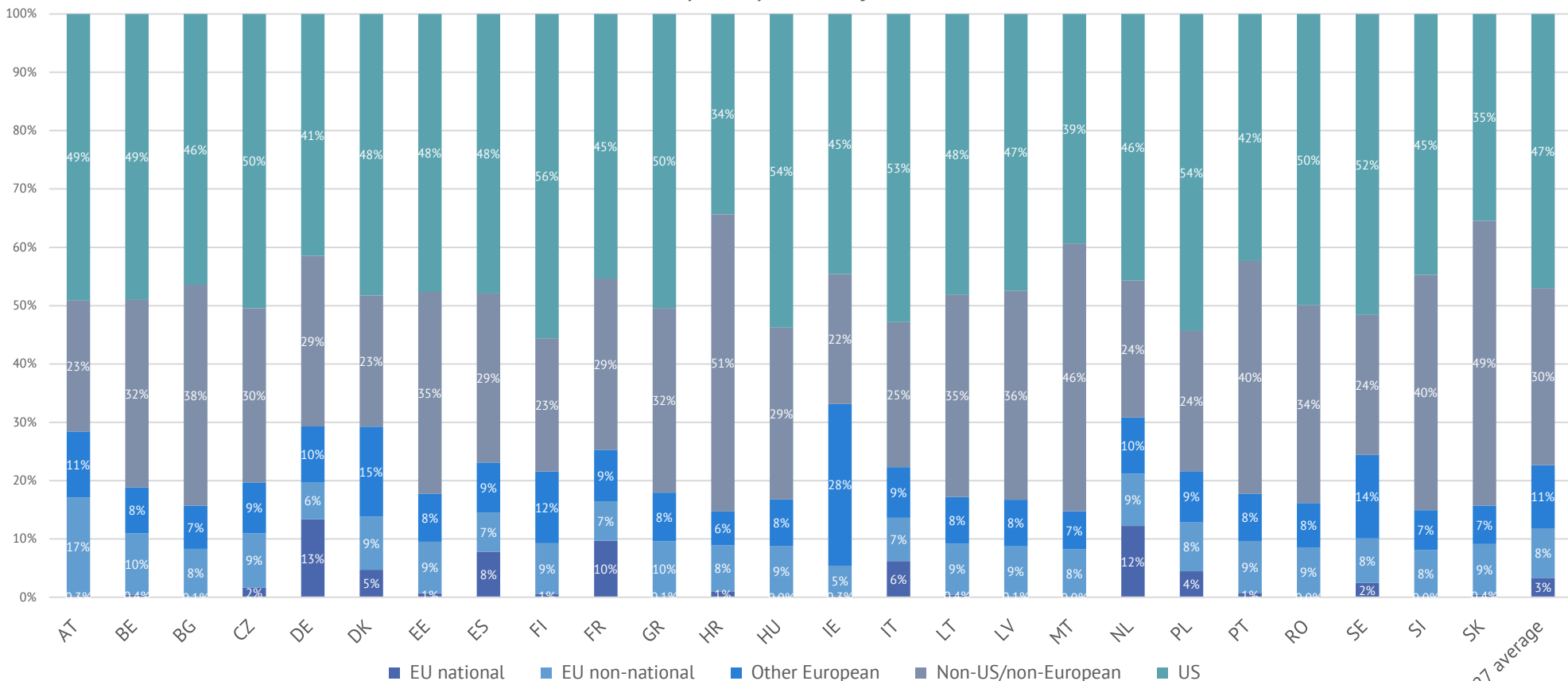


# C – Origin of works in VOD catalogues – TV seasons on SVOD services by country

## SVOD – on average, 23% of all TV seasons are of European origin, ranging from 15% in HR to 33% in IE

- For EU27 TV seasons, the highest share were reached in NL (21%), DE (20%), AT (17%), FR (16%) and ES (15%). The lowest share were found in IE (5%, the high share of European TV seasons came from an above-average share of other European TV seasons), SI, MT and BG (8%).
- National TV seasons reached their highest shares in DE (13% of all TV seasons), NL (12%), FR (10%), ES (8%) and IT (6%) while EU non-national TV seasons were more found in AT (17%), BE (10%) and GR (10%), all countries with a share of national TV seasons below 1%.
- 8 countries had a share of US TV seasons above 50% (FI, PL, HU, IT, SE, CZ, GR, RO) and 5 countries had a share of non-US/non-European TV seasons above 40% (HR, SK, MT, SI, PT).

SVOD - Origin of TV seasons by region of origin  
by country, in share of total



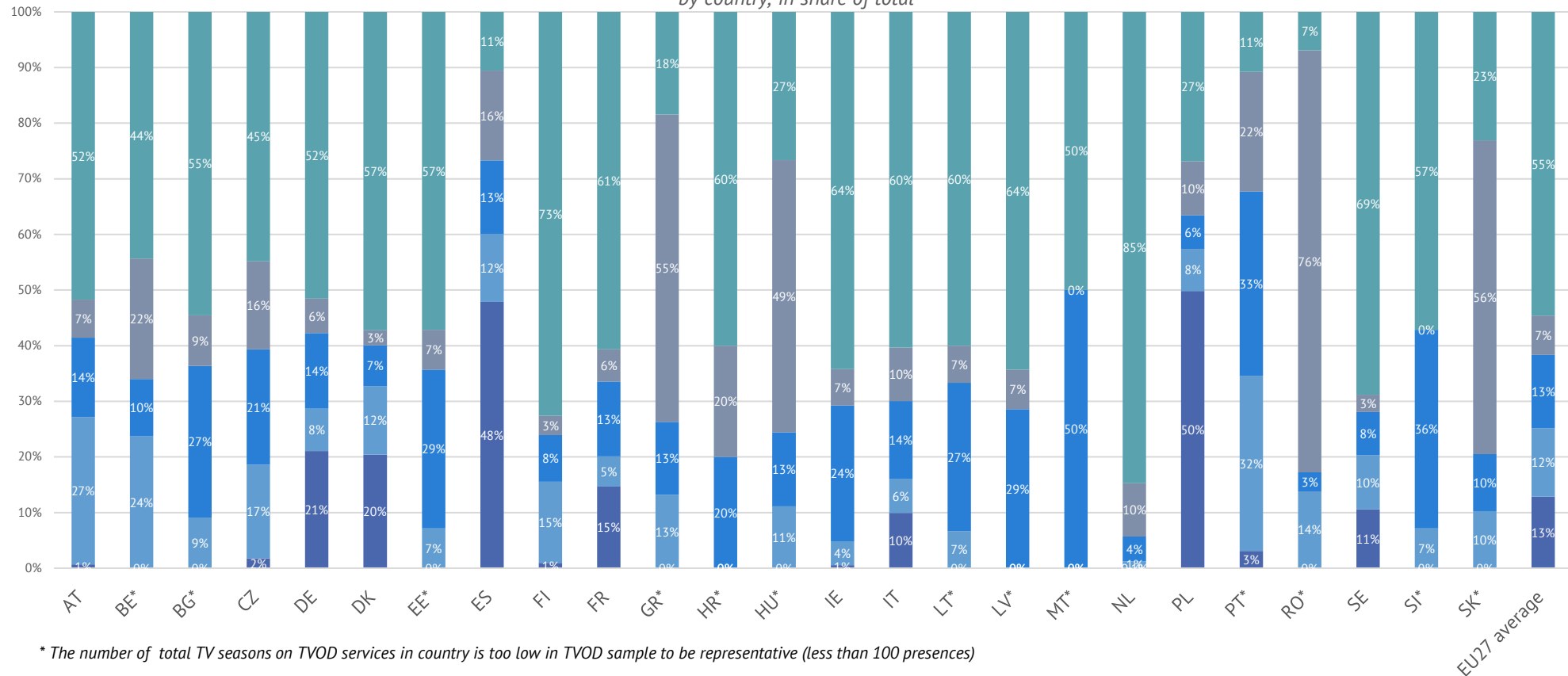
Source: JustWatch catalogue data

# C – Origin of works in VOD catalogues – TV seasons on TVOD services by country

**TVOD – on average, 38% of all TV seasons are of European origin, ranging from 6% in NL to 73% in ES**

- On TVOD, the number of services offering TV seasons is low and for several countries non-representative.
- Countries in which national TV services were included in the sample, such as ES (Mitele, Filmin, Atresplayer), PL (player.pl) and DE (Magenta TV) had a much higher share of national TV seasons than in countries where no national TV services were included in the sample. In NL, the majority of TV seasons offering on TVOD in the sample is from the Microsoft Film and TV catalogue, therefore with a low share of European TV seasons).

TVOD - Origin of TV seasons by region of origin  
by country, in share of total



\* The number of total TV seasons on TVOD services in country is too low in TVOD sample to be representative (less than 100 presences)

Source: JustWatch catalogue data

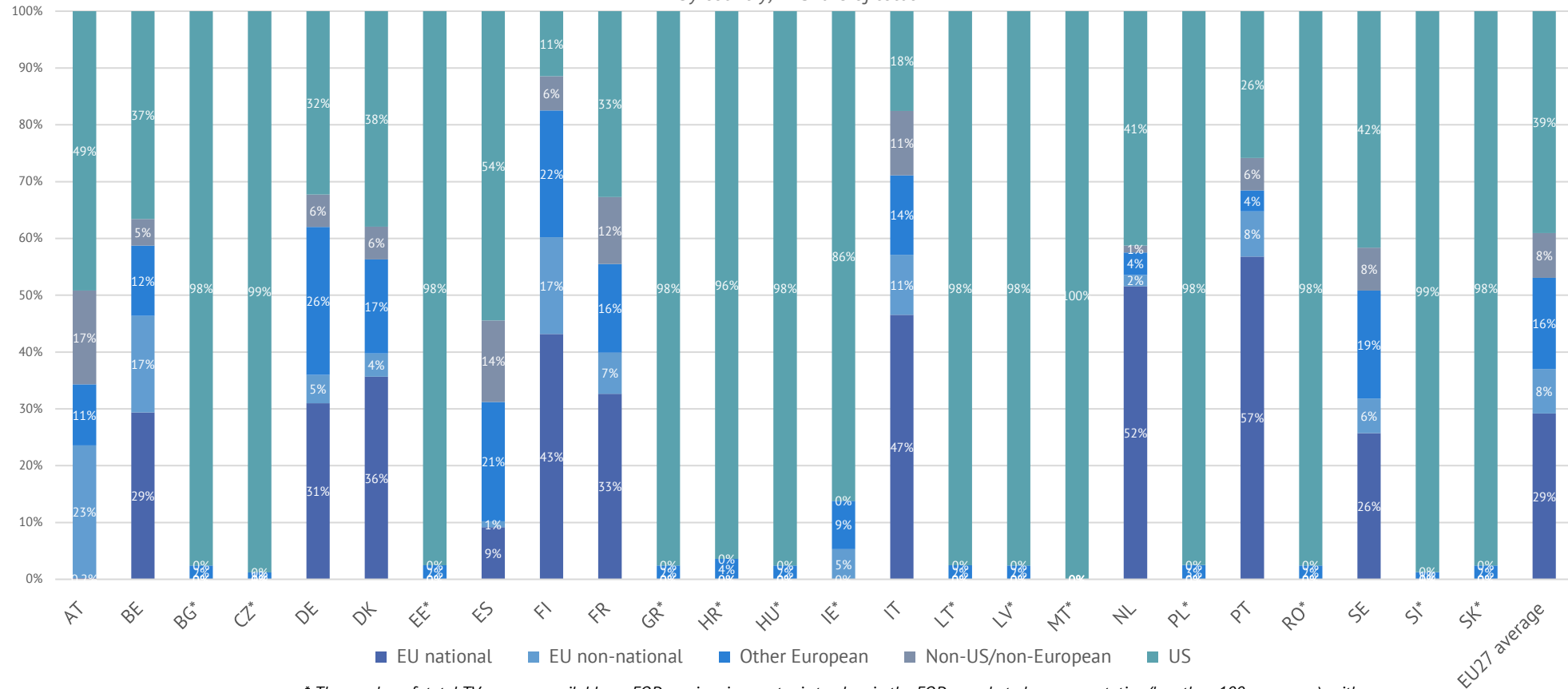
■ EU national ■ EU non-national ■ Other European ■ Non-US/non-European ■ US

# C – Origin of works in VOD catalogues – TV seasons on FOD services by country

**FOD – on average, 53% of all TV seasons are of European origin, ranging from 0% in MT to 83% in FI**

- As for TVOD, in countries where national FOD services, often operated by national broadcasters, were included in the sample, the share of EU27 TV seasons, and mainly of national TV seasons is much higher. This was the case for BE (RTBF, VRTNU), DE (Mediathek), DK (DRDK), FI (YLE), FR (FranceTV, M6+, ARTE), IT (Raiplay), NL (NPOstart), PT (RTPplay), SE (SVTPlay).
- In other countries, pan-European and multi-country pan-European services included in the sample are mostly offering catalogue US TV seasons to their viewers.

FOD - Origin of TV seasons by region of origin  
by country, in share of total



Source: JustWatch catalogue data

\* The number of total TV seasons available on FOD services in country is too low in the FOD sample to be representative (less than 100 presences), with mostly 2 pan-European FOD services in these countries, classixapp and filmzie)

### D - Share of EU national and EU non-national works in VOD catalogues

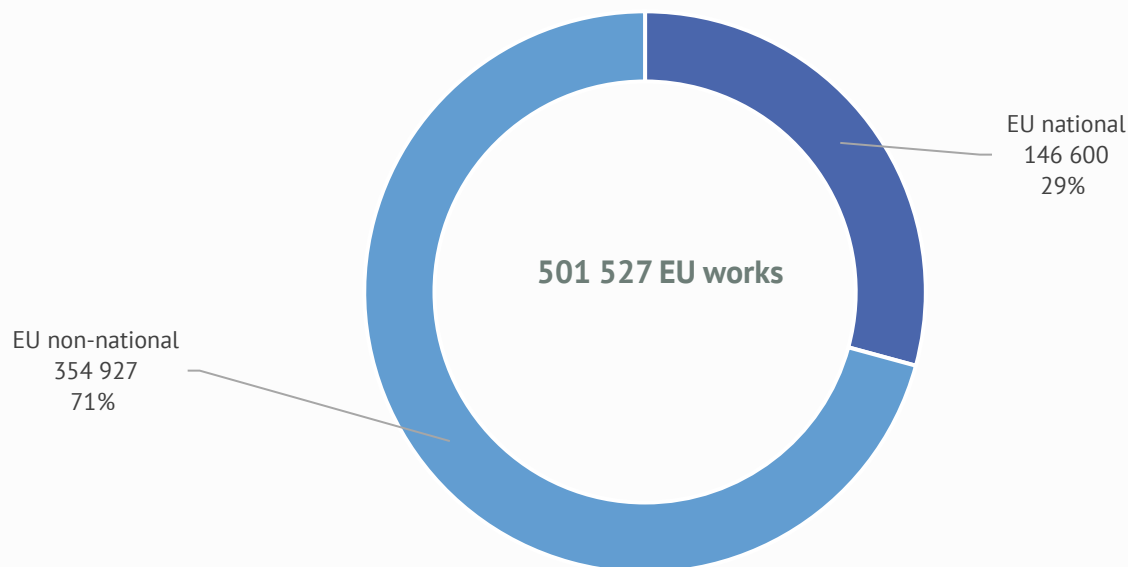
- This section **only deals with EU27 works** (all works, films, TV seasons) and the **presences of works** are taken into account

## D - Share of EU national and EU non-national works in VOD catalogues – All works

### An EU27 film and TV offering on VOD services majorly composed of EU non-national works

- In the catalogues of the VOD services analysed in the 25 EU27 countries, more than 2/3 of all EU27 works are of non-national origin.
- The composition of VOD catalogues regarding EU27 works is impacted by the volume of audiovisual production (film and TV fiction) in the country.
- In major film and TV production countries, such as FR, DE, IT and ES, VOD services rely more on national productions for their EU27 content offering whereas in mid- to low-volume production countries, VOD services rely more on productions from other EU27 countries for their EU27 content offering.
- The presence of global SVOD players, with catalogues in all or several EU countries, also impacts the share of EU non-national works as these players tend to make available EU27 original works in all their catalogues or acquire licences on a pan-European/multi-country level.

Share of EU national and EU non-national works (films and TV seasons)  
all 25 EU27 countries, in numbers and share of total EU works

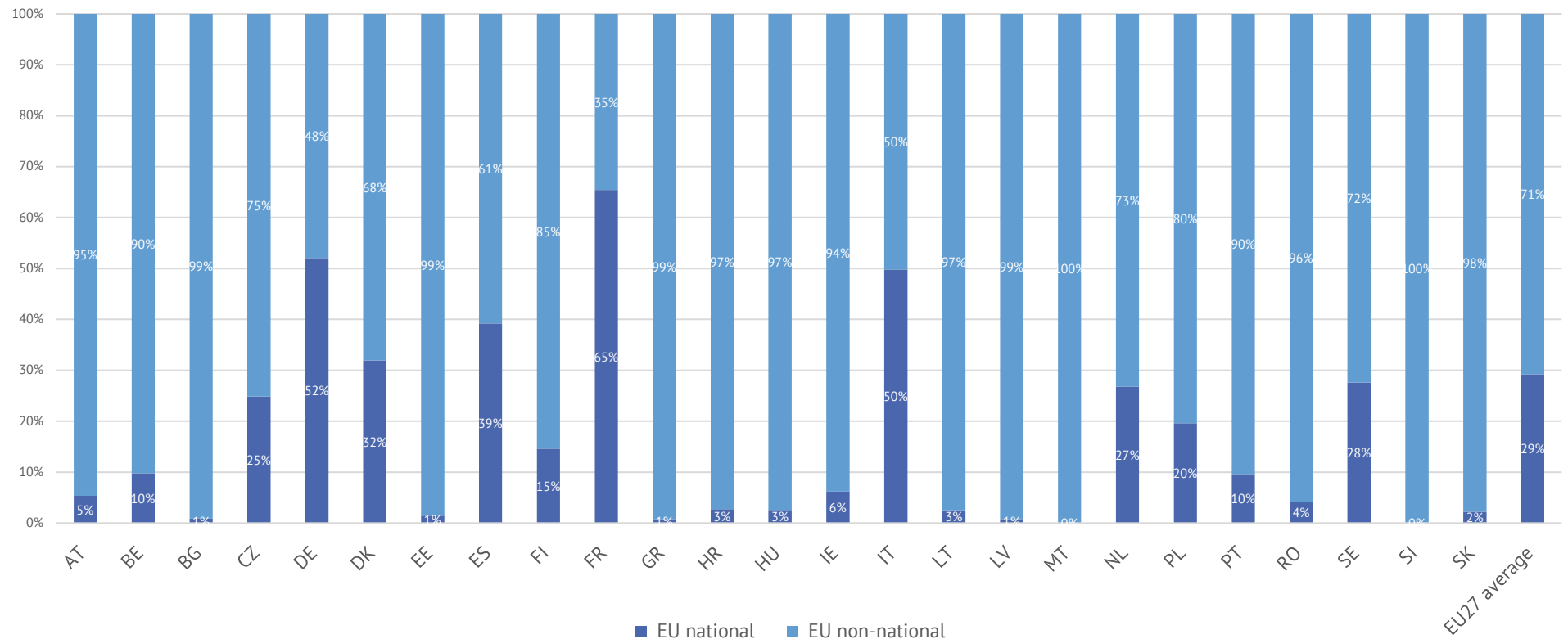


# D - Share of EU national and EU non-national works in VOD catalogues by country

From a share of 0.1% of national works in MT to 65% in FR, a heterogenous situation for EU27 works on VOD

- Three major film and TV production countries (FR, DE, IT) had a share of national works out of EU27 works above 50% while in 13 countries the share of national works was below 10% (IE, AT, RO, HR, HU, LT, SK, EE, BG, LV, GR, SI, MT).
- In ES and DK, the share of national works was 39% and 32% respectively, with strong national audiovisual production sectors from which VOD services can source (original productions/licensing) works for their catalogues.

Share of EU national and EU non-national works (films and TV seasons)  
by country, in numbers and share of total EU works





## Share EU national and EU non-national films

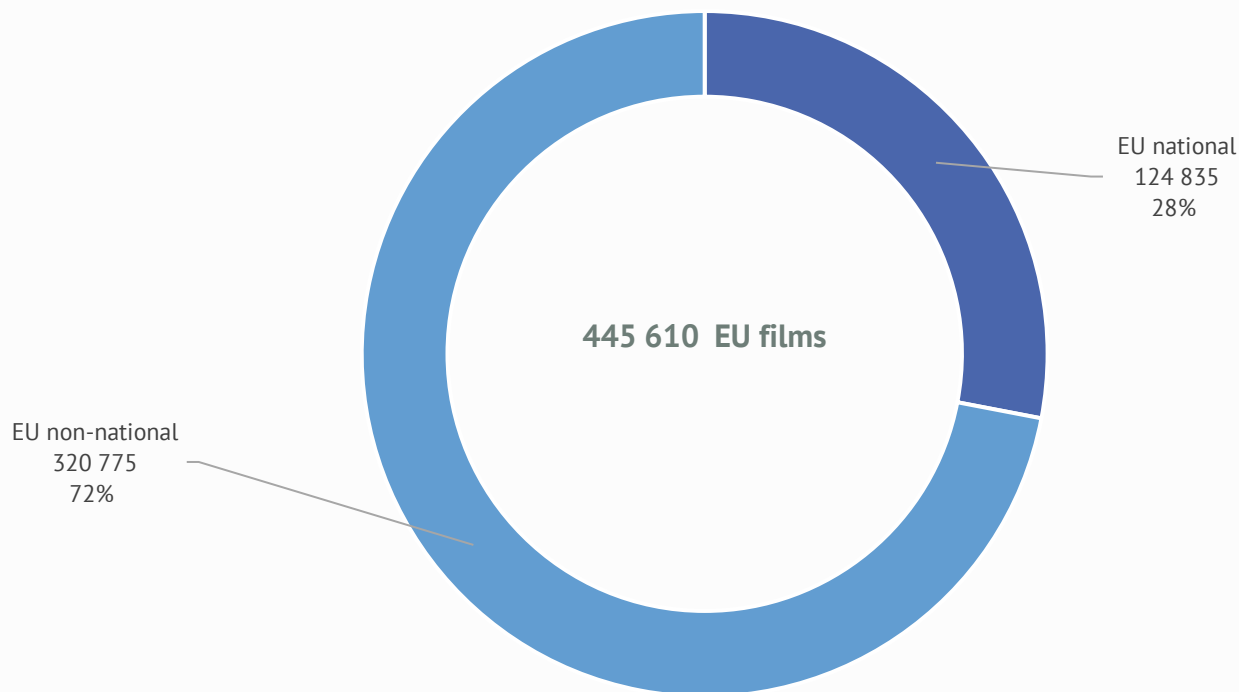
- This section **only deals with EU27 films** and the **presences of films** are taken into account.

## D - Share of EU national and EU non-national works in VOD catalogues - Films

### A large share of EU non-national films in VOD catalogues for their EU27 film offerings

- With more than 320 000 films in VOD catalogues, EU non-national films accounted for 72% of all EU27 films available to Europeans in VOD catalogues part of the sample.

Share of EU national and EU non-national films  
all 25 EU27 countries, all business models, in numbers and share of total EU films

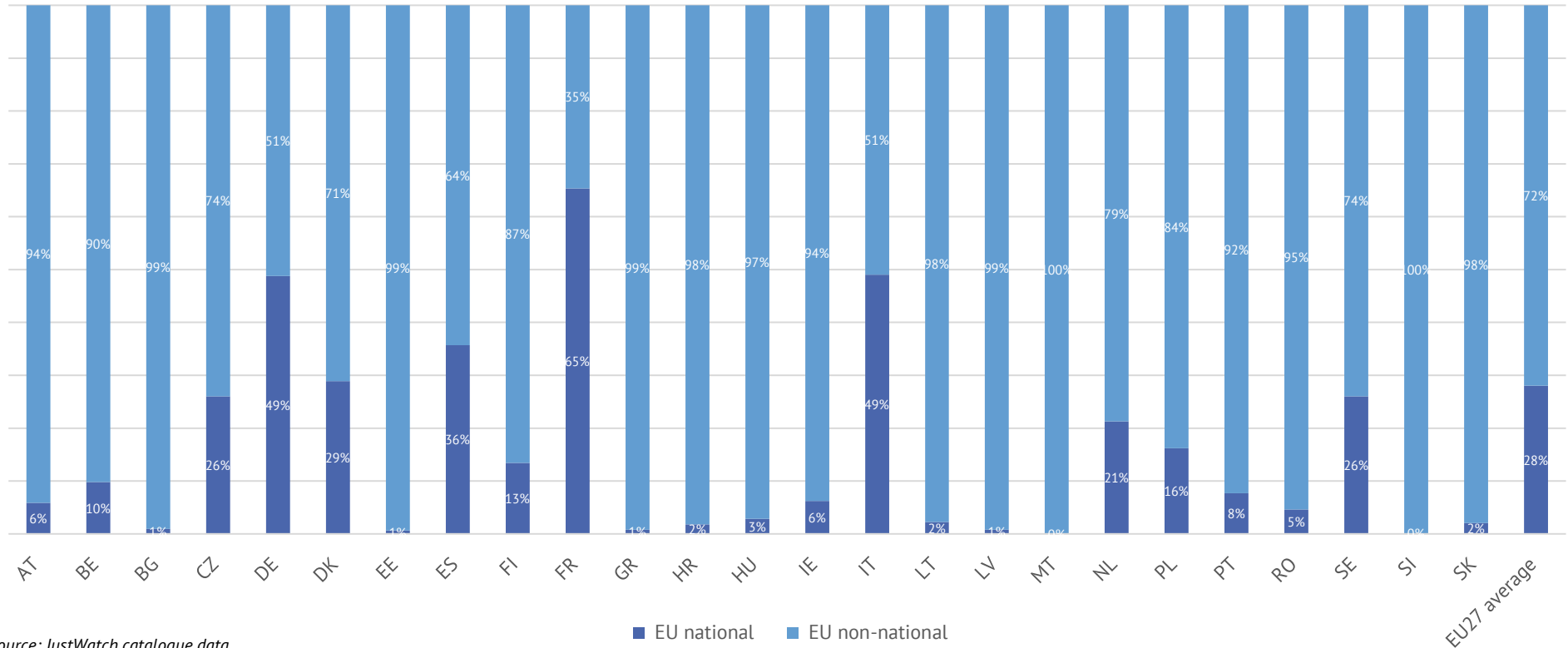


# D - Share of EU national and EU non-national works in VOD catalogues – Films by country

**From 35% in FR to 100% in MT, EU non-national films were the largest part of EU27 film offering on VOD**

- Only five countries had a share of national films out of EU27 films above the EU27 average of 28%: FR (65%), IT (49%), DE (49%), ES (36%) and DK (29%). These five countries all have well developed film production industries and also manage to export their national film productions.
- Fourteen countries had a share of national films below 10%: PT (8%), IE (6%), AT (6%), RO (5%), HU (3%), SK (2%), HR (2%), BG, LV, GR, EE (1%), SI, MT (0.1%).
- With shares of national films comprised between 10% (BE) and 26% (CZ), six countries with mid-volume production industries are below the EU27 average, heavily impacted by shares in major production countries.

Share of EU national and EU non-national films  
by country, in numbers and share of total



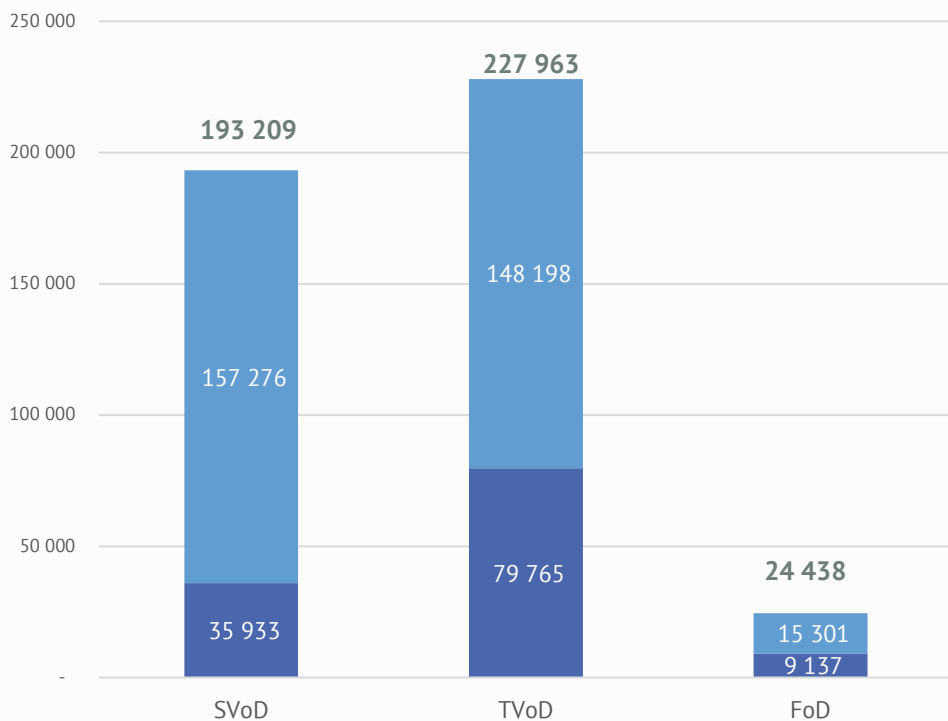
Source: JustWatch catalogue data

# D - Share of EU national and EU non-national works in VOD catalogues – Films by business model

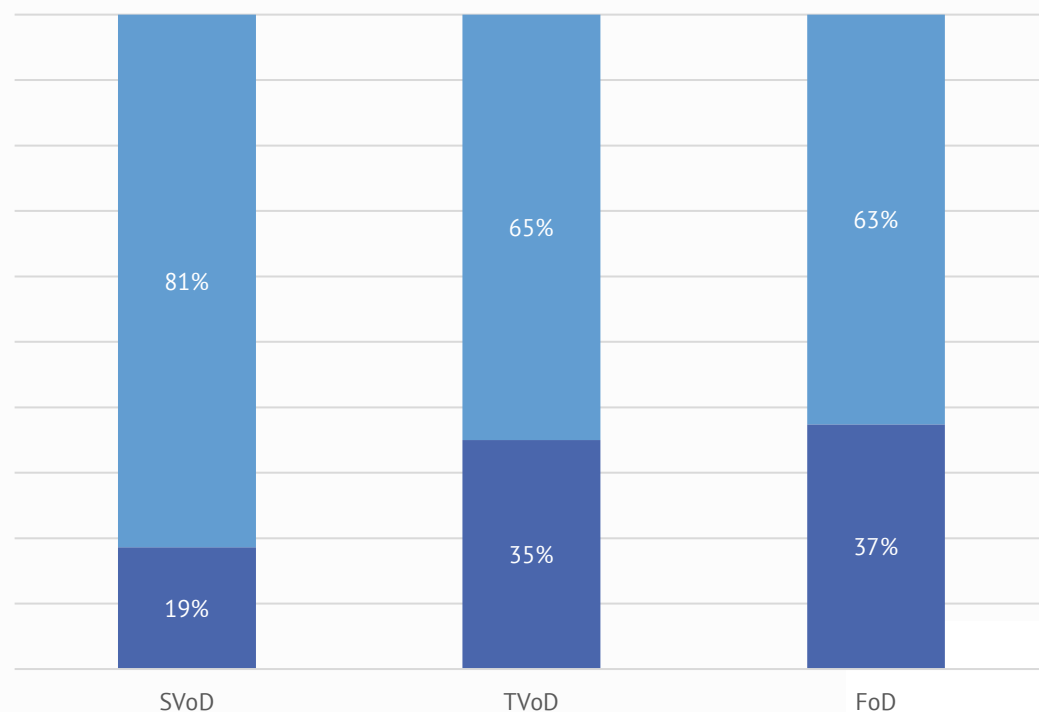
## A higher share of national films on TVOD and FOD services than on SVOD services

- With respective shares of 35% and 37% of national films, TVOD and FOD services offered a higher proportion of national films than SVOD services.
- SVOD services, comprised in the VOD sample of global and national SVOD players, on the other hand rely much more on non-national films for their EU27 film offering.
- Volume-wise, TVOD services carried the largest number of EU27 films with over 227 900 films, followed by SVOD and FOD services.

Share of EU national and EU non-national films by business model  
all 25 EU27 countries, in numbers



Share of EU national and EU non-national films by business model  
all 25 EU27 countries, in share of total

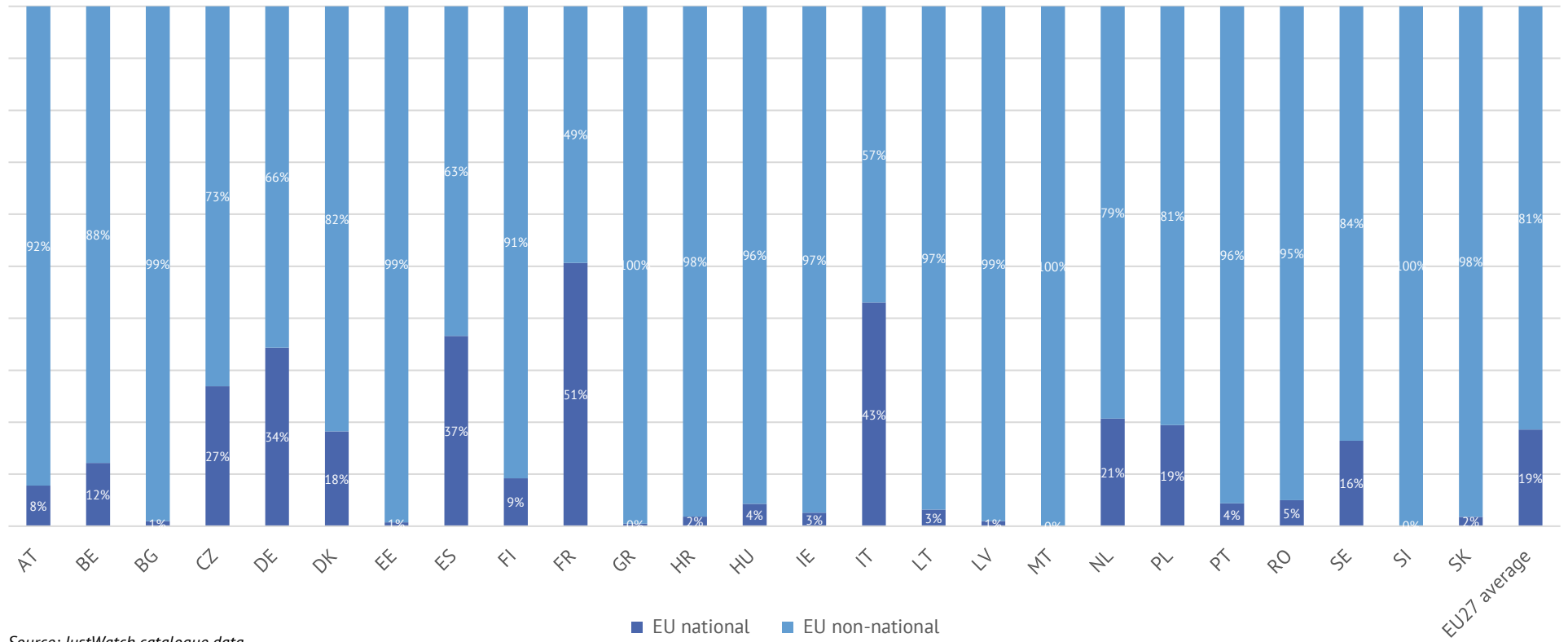


# D - Share of EU national and EU non-national works in VOD catalogues – Films on SVOD services by country

SVOD – on average, a share of 19% of national films, from 0.1% in MT to 51% in FR

- Without surprise, the shares of national films out of EU27 films are more important in high-volume film production countries such as FR (51%), IT (43%), ES (37%) and DE (34%).
- Fifteen countries with smaller film production industries, had shares of national films below the 10%-threshold: FI, AT, RO, PT, HU, LT, IE, HR, SK, LV, BG, EE, GR, SI and MT). In these countries, mostly global SVOD services are included in the VOD sample which furthermore impacts the share of national films.
- Five countries (CZ, NL, PL, DK, SE) with well-developed film production industries, had shares of national films around the EU27 average.

SVOD - Share of EU national and EU non-national films by country, in numbers and share of total



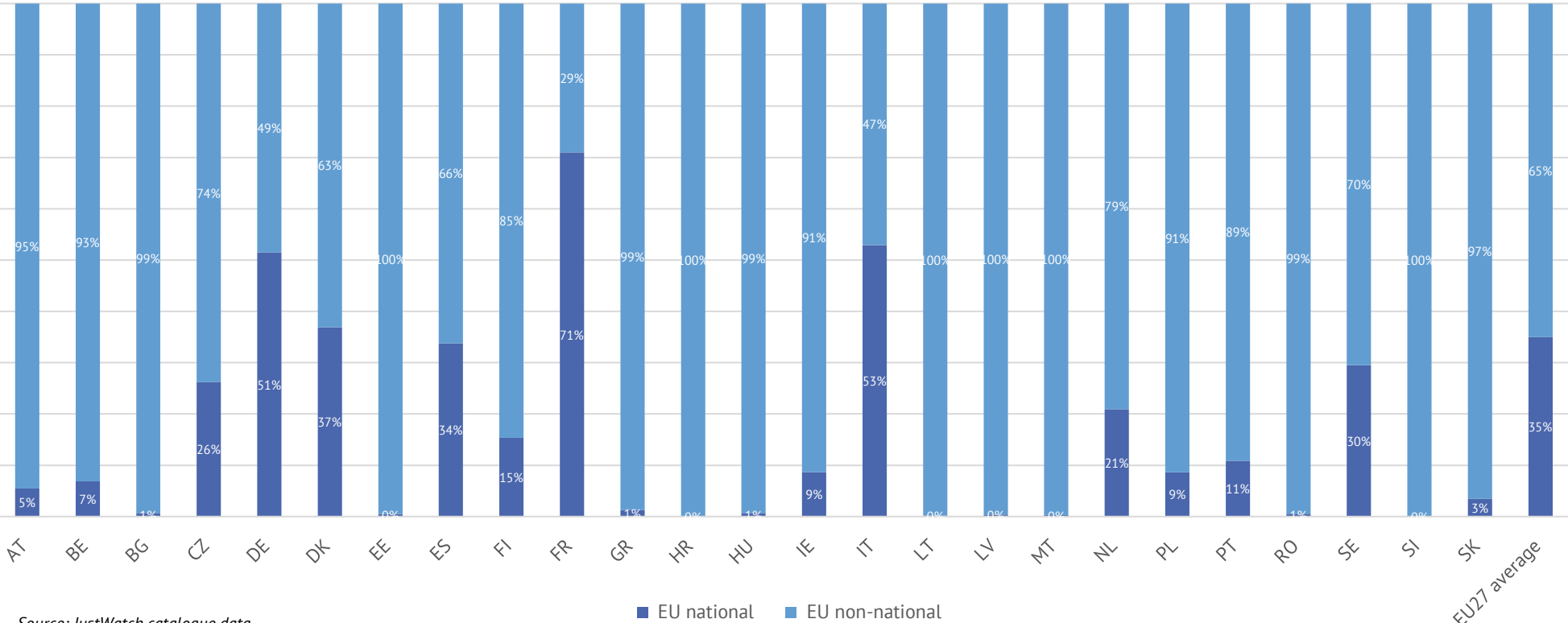
Source: JustWatch catalogue data

# D - Share of EU national and EU non-national works in VOD catalogues – Films on TVOD services by country

TVOD – on average, a share of 35% of national films, from 0% in HR to 71% in FR

- In FR, IT and DE, the share of national films was above 50%, showing the use of TVOD services to distribute national theatrical productions.
- In fifteen countries without national TVOD services in the VOD sample, the share of national films is below 10%.
- In DK, ES, SE, CZ and NL, with shares of national films ranging from 37% to 21%, TVOD can rely on a well-developed national film production sector to compose their EU27 film offering.

TVOD - Share of EU national and EU non-national films by country, in numbers and share of total



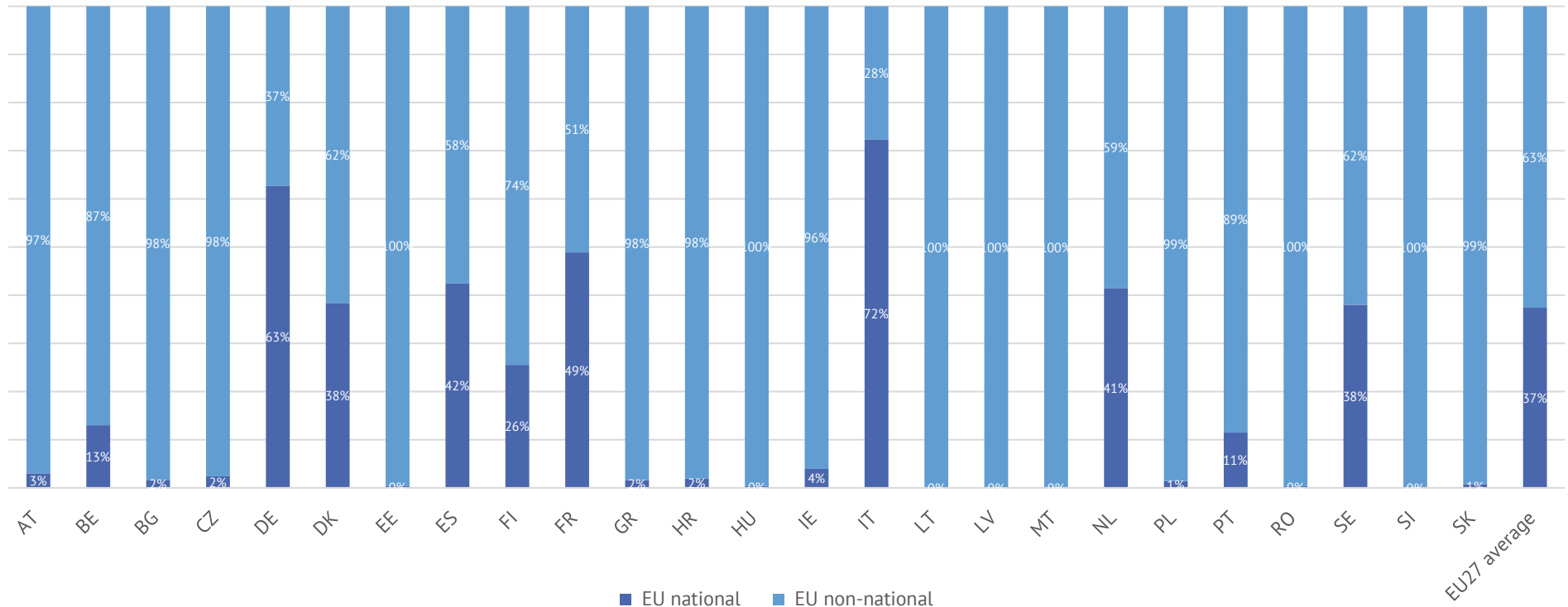
Source: JustWatch catalogue data

# D - Share of EU national and EU non-national works in VOD catalogues – Films on FOD services by country

FOD – on average, a share of 37% of national films, from 0% in four countries to 72% in IT

- In the 10 countries with FOD services operated by public and private broadcasters (BE, DE, DK, ES, FR, FR, IT, NL, PT, SE), the share of national films out of EU27 films ranged between 11% (PT) and 72% (IT).
- In the other 15 countries, with FOD services operated by global AVOD services, the offer of EU27 films is mainly composed of EU non-national films.

FOD - Share of EU national and EU non-national films  
by country, in numbers and share of total



## Share EU national and EU non-national TV seasons

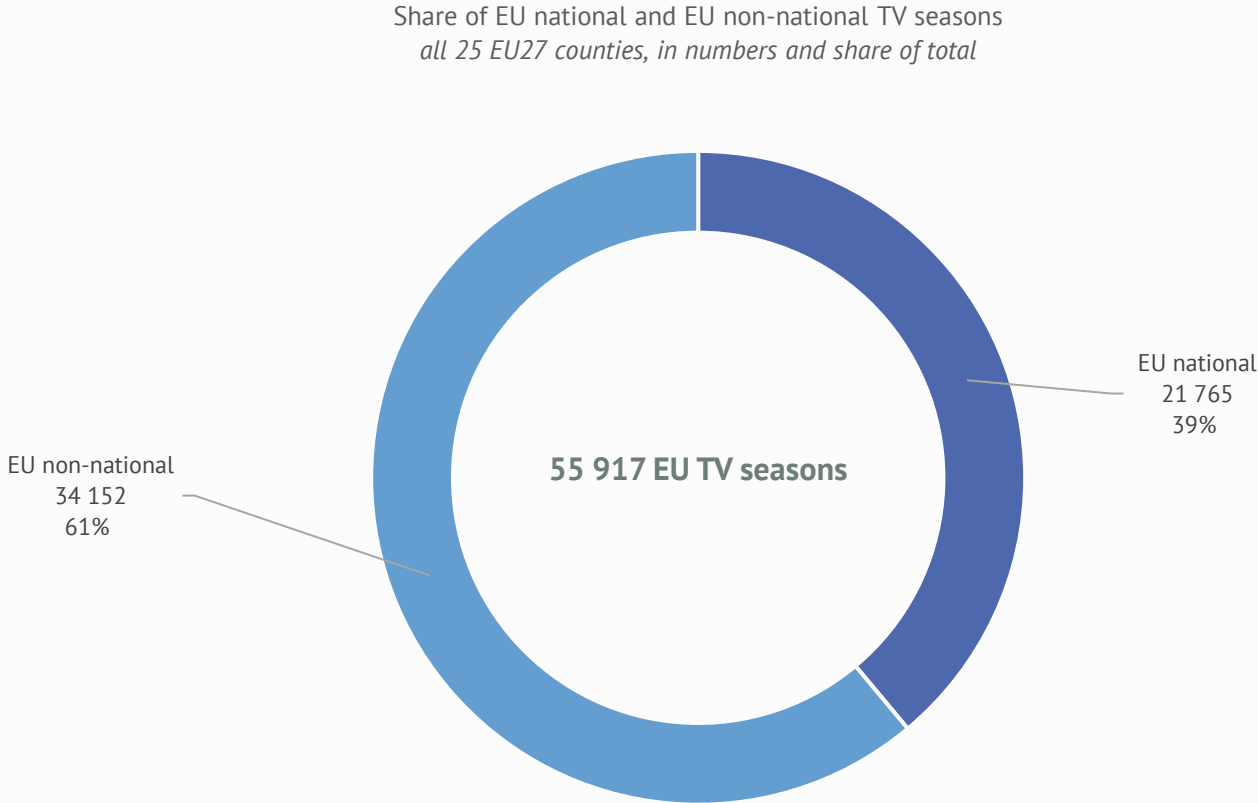
- This section **only deals with EU27 TV seasons** and the **presences of TV seasons** are taken into account.



# D - Share of EU national and EU non-national works in VOD catalogues – TV seasons

## A higher share of EU27 national TV seasons in VOD catalogues than for films

- EU national TV seasons accounted for 39% out of all EU27 TV seasons available on VOD services in the 25 countries, a higher share than for national films which accounted for 28% of all EU27 films.



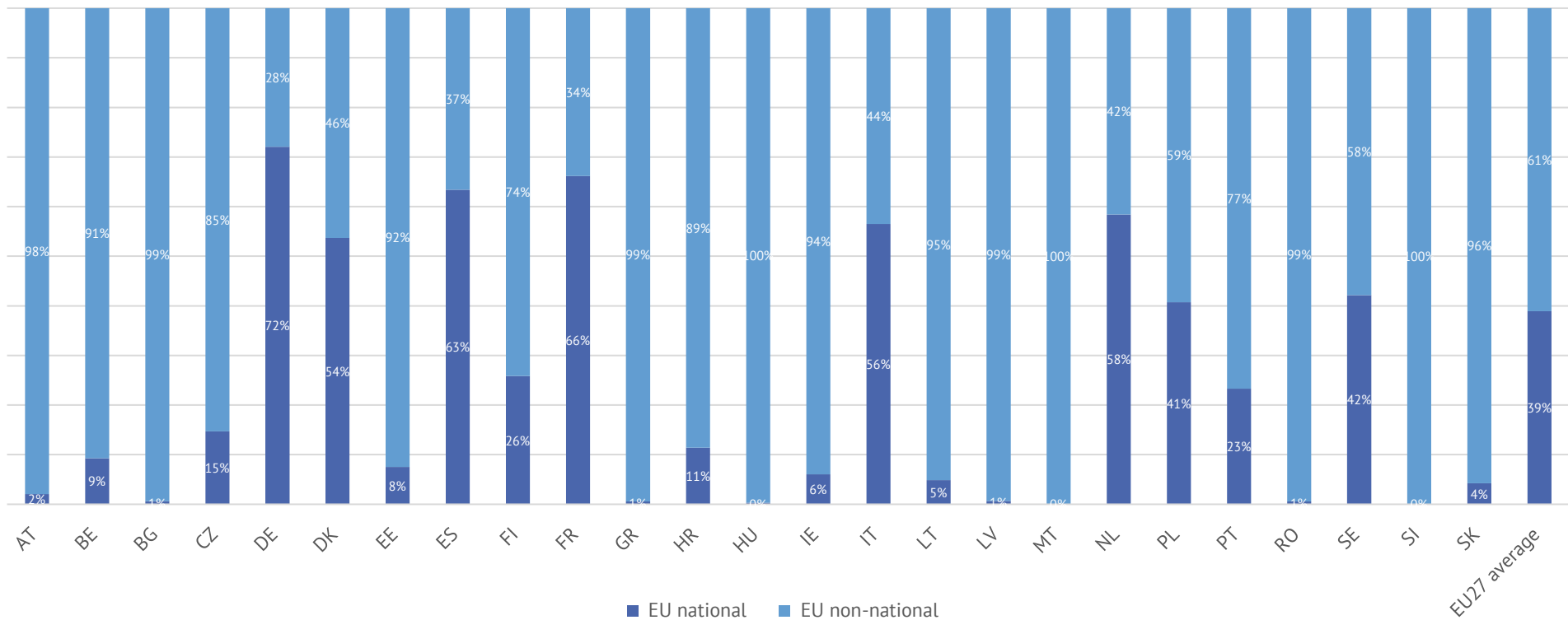
Source: JustWatch catalogue data

# D - Share of EU national and EU non-national works in VOD catalogues – TV seasons by country

From 28% in DE to 100% in MT, EU non-national TV seasons were the largest part of EU27 TV offering on VOD with an EU27 average of 61%

- Six countries had more national TV seasons in their VOD offerings than EU non-national TV seasons: DE (72%), FR (66%), ES (63%), NL (58%) and DK (42%). These countries have also a strong TV fiction production industry.
- Thirteen countries (BE, EE, IE, LT, SK, AT, LV, BG, GR, RO, HU, MT, SI) had shares of national TV seasons below 10% and the EU27 TV offering was mostly composed of non-national TV seasons.

Share of EU national and EU non-national TV seasons  
by country, in numbers and share of total

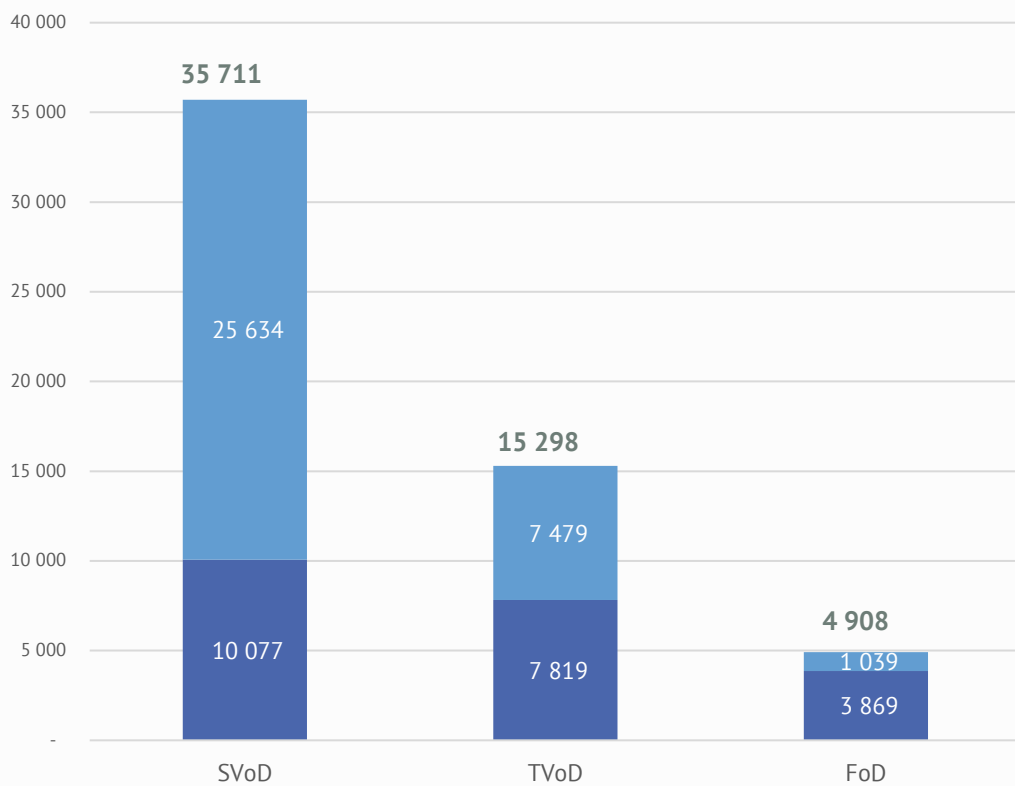


# D - Share of EU national and EU non-national works in VOD catalogues – TV seasons by business model

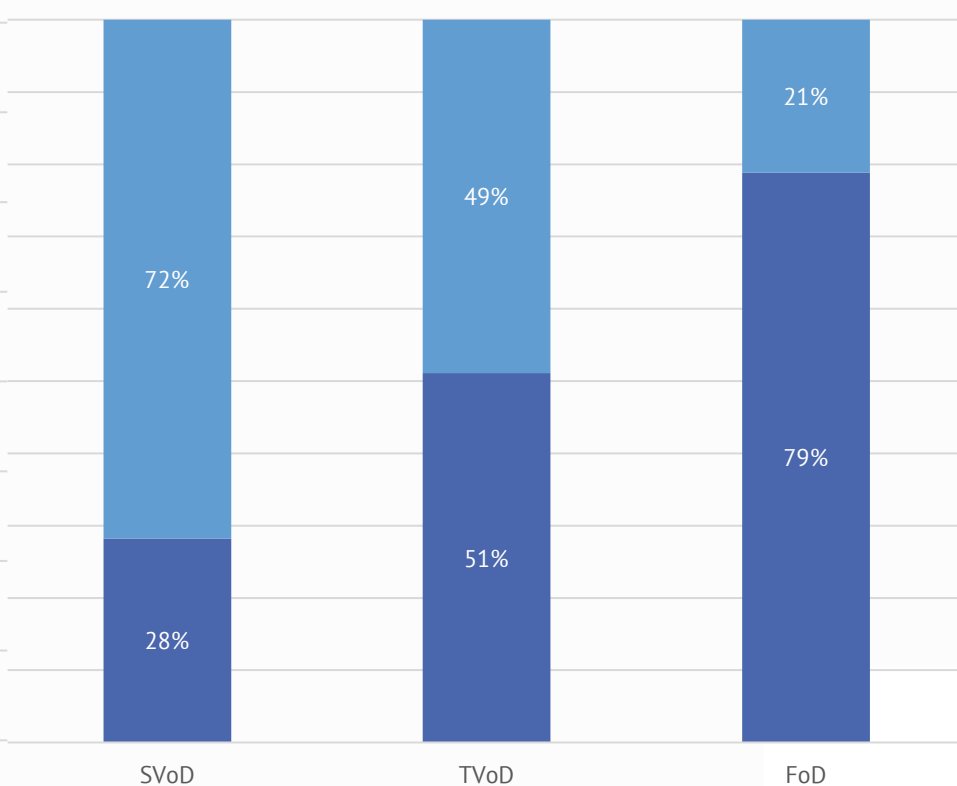
## EU27 TV seasons offering was majorly national on FOD and TVOD services, non-national on SVOD services

- FOD services EU27 TV seasons offering was majorly composed of national TV seasons. The presence of FOD services of national broadcasters in several countries was the main reason as these broadcasters make their national content available for on-demand viewing on their replay services.
- On TVOD, EU27 TV seasons were equally split between national and non-national TV seasons.
- On SVOD services, global SVOD players such as Netflix, Amazon or Max, tend to circulate their EU27 TV seasons in their European catalogues, thus offering EU27 TV catalogues mainly composed of non-national TV seasons.

Share of EU national and EU non-national TV seasons by business model  
all 25 EU27 countries, in numbers



Share of EU national and EU non-national TV seasons by business model  
all 25 EU27 countries, in share of total



Source: JustWatch catalogue data

■ EU national ■ EU non-national

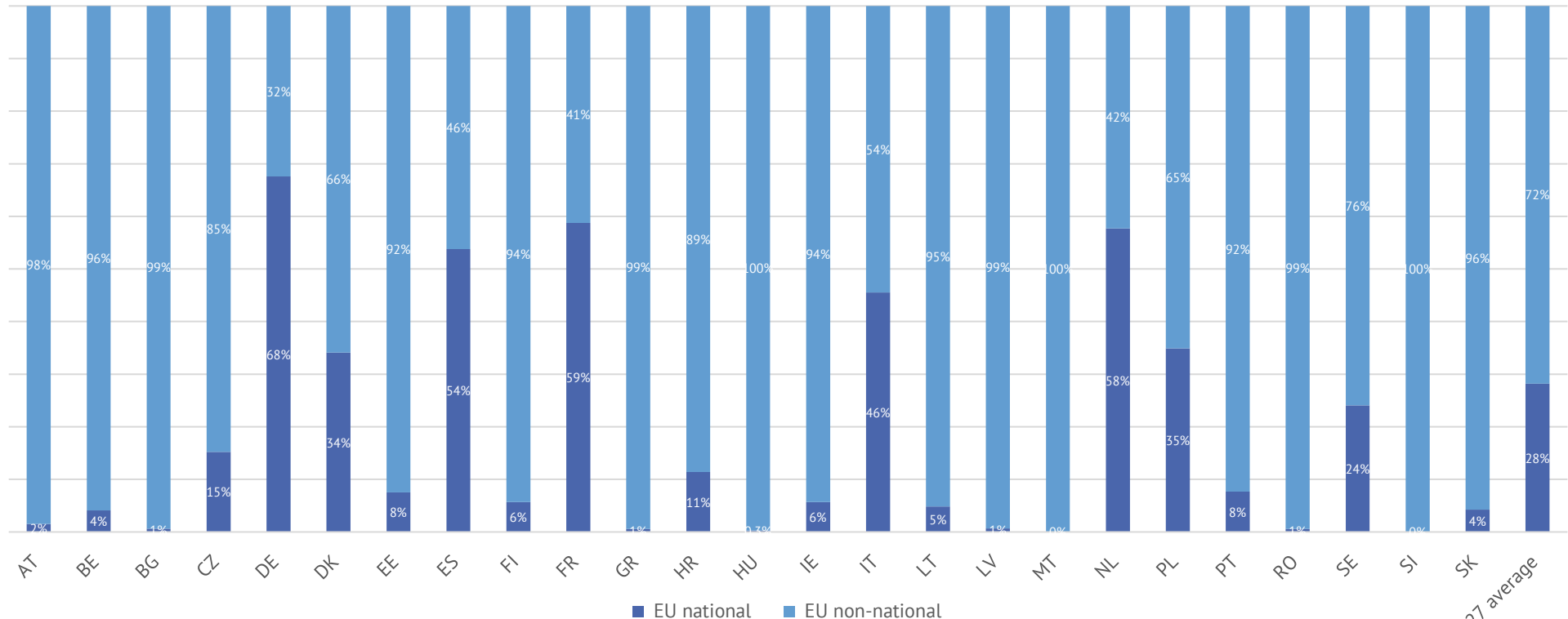
■ EU national ■ EU non-national

# D - Share of EU national and EU non-national works in VOD catalogues – TV seasons on SVOD services by country

SVOD – on average, a share of 28% of national TV seasons, from 0% in MT/SI to 68% in DE

- In four countries, national TV seasons represented the majority out of the EU27 TV seasons offering on SVOD: DE (68%), FR (59%), NL (58%) and ES (54%).
- The presence of NLZIET with a majority of Dutch TV programmes explains the presence of NL with the three other high-volume TV fiction production countries.
- In fifteen countries, the share of national TV seasons ranges from 0% (SI and MT) to 8% (PT and EE). In these countries, global SVOD services relied more on non-national TV seasons for their EU27 TV offering.

SVOD - Share of EU national and EU non-national TV seasons  
by country, in numbers and share of total



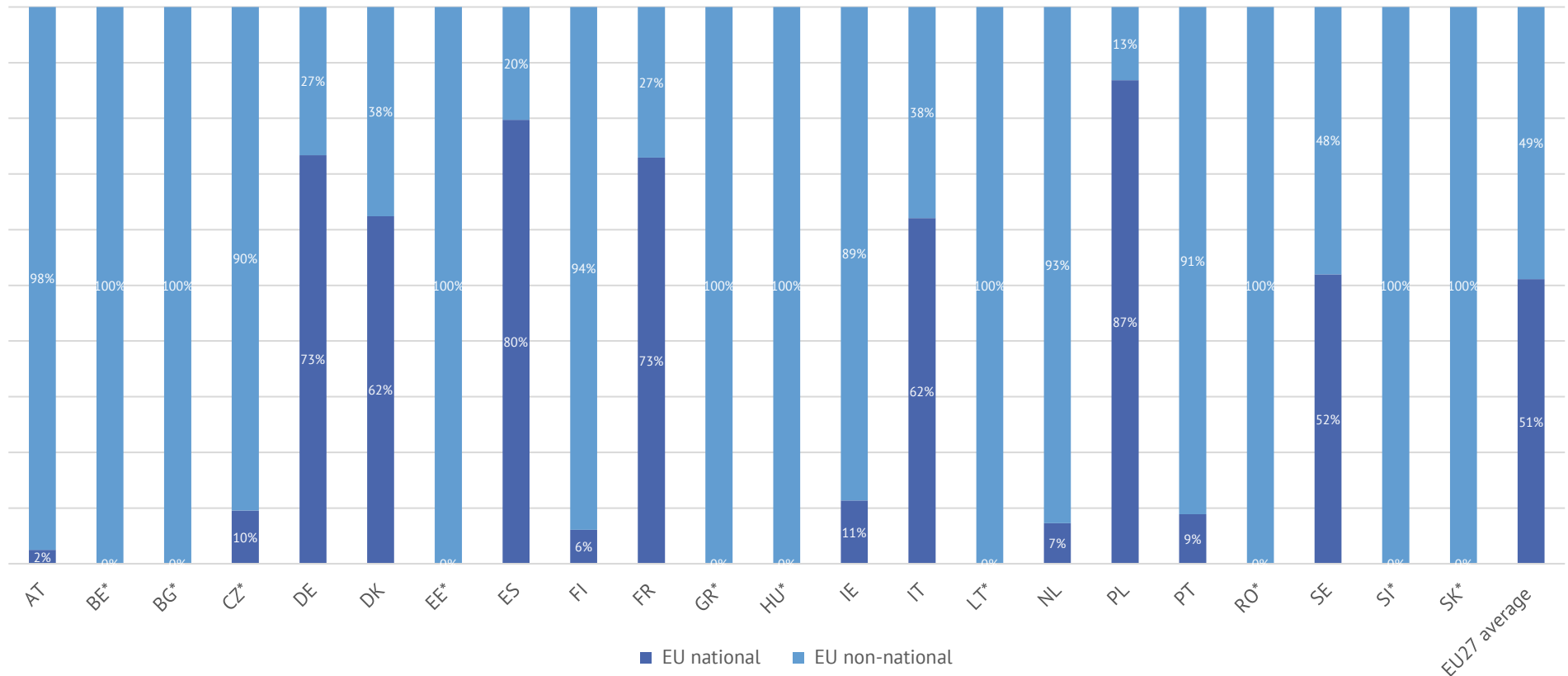
Source: JustWatch catalogue data

# D - Share of EU national and EU non-national works in VOD catalogues – TV seasons on TVOD services by country

## TVOD – high share of national TV seasons in countries with national TVOD services

- In countries which had a national TVOD services in the VOD sample, the EU27 TV seasons offering is mainly composed of national TV seasons with shares ranging from 52% in SE to 87% in PL.
- This was the case in DE (Magenta TV, Maxdome), DK and SE (SF Anytime, Blockbuster), ES (Filmin, Atresplayer, Mitele), FR (Canal VOD, Orange VOD, UniversCiné, Bbox), IT (Chili) and PL (player.pl).

TVOD - Share of EU national and EU non-national TV seasons by country, in numbers and share of total

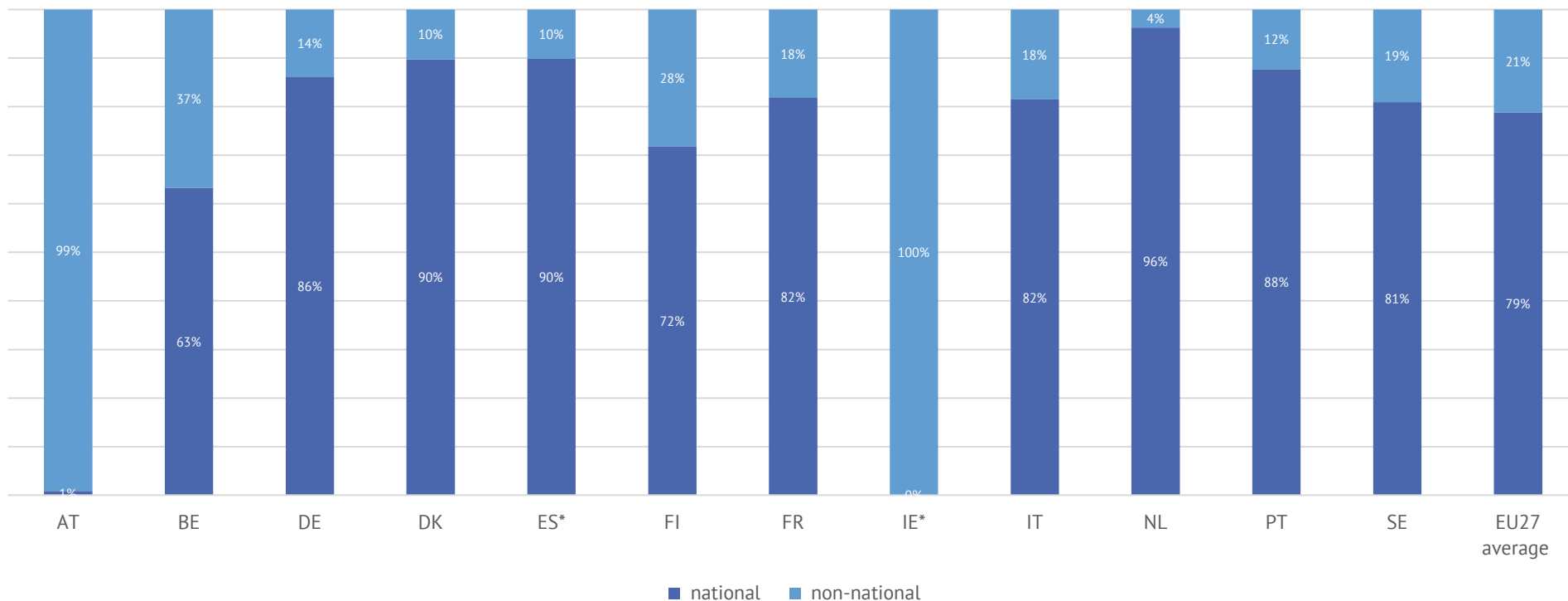


# D - Share of EU national and EU non-national works in VOD catalogues – TV seasons on FOD services by country

FOD – on average, 79% of national TV seasons in EU27 TV seasons offering

- The high shares of national TV seasons in most of the countries in which EU27 TV seasons were offered on FOD services is explained by the presence of national broadcasters which carry mostly national TV content in their FOD catalogues.
- The absence of 13 countries (BG, CZ, EE, GR, HR, HU, LT, LV, MT, PL, RO, SI, SK) in the graph is explained by the absence of EU27 TV seasons in the catalogues of the two FOD services part of the sample for these countries (classixapp and filmzie).

FOD - Share of EU national and EU non-national TV seasons  
by country, in numbers and share of total



\* The number of total EU27 TV seasons on FOD services in country is too low in FOD sample to be representative (less than 100 presences)

## **Annex**

### **Number of VOD catalogues by country and business model**

# Number of VOD services in the sample by country and business model

## All works

Number of VOD catalogues by country and business model

Country	FoD	SVoD	TVoD	Total
AT	11	48	15	<b>74</b>
BE	6	28	7	<b>41</b>
BG	2	24	4	<b>30</b>
CZ	2	26	7	<b>35</b>
DE	21	68	22	<b>111</b>
DK	4	34	9	<b>47</b>
EE	2	21	5	<b>28</b>
ES	6	44	12	<b>62</b>
FI	7	32	10	<b>49</b>
FR	10	48	18	<b>76</b>
GR	2	19	6	<b>27</b>
HR	4	31	4	<b>39</b>
HU	2	23	7	<b>32</b>
IE	3	33	10	<b>46</b>
IT	7	47	8	<b>62</b>
LT	2	22	5	<b>29</b>
LV	2	21	5	<b>28</b>
MT	3	22	5	<b>30</b>
NL	4	37	12	<b>53</b>
PL	3	30	10	<b>43</b>
PT	3	24	9	<b>36</b>
RO	2	22	4	<b>28</b>
SE	6	34	10	<b>50</b>
SI	3	25	6	<b>34</b>
SK	3	34	6	<b>43</b>
<b>Total</b>	<b>120</b>	<b>797</b>	<b>216</b>	<b>1 133</b>

## Films

Number of VOD catalogues by country and business model

Country	FoD	SVoD	TVoD	Total
AT	11	48	15	<b>74</b>
BE	6	28	7	<b>41</b>
BG	2	24	4	<b>30</b>
CZ	2	26	7	<b>35</b>
DE	20	68	22	<b>110</b>
DK	4	34	9	<b>47</b>
EE	2	21	5	<b>28</b>
ES	6	43	12	<b>61</b>
FI	7	32	10	<b>49</b>
FR	10	46	18	<b>74</b>
GR	2	19	6	<b>27</b>
HR	4	31	4	<b>39</b>
HU	2	23	7	<b>32</b>
IE	3	33	10	<b>46</b>
IT	7	47	8	<b>62</b>
LT	2	22	5	<b>29</b>
LV	2	21	5	<b>28</b>
MT	3	22	5	<b>30</b>
NL	3	37	12	<b>52</b>
PL	3	30	10	<b>43</b>
PT	3	24	9	<b>36</b>
RO	2	22	4	<b>28</b>
SE	6	34	10	<b>50</b>
SI	3	25	6	<b>34</b>
SK	3	34	6	<b>43</b>
<b>Total</b>	<b>118</b>	<b>794</b>	<b>216</b>	<b>1 128</b>

## TV seasons

Number of VOD catalogues by country and business model

Country	FoD	SVoD	TVoD	Total
AT	9	24	10	<b>43</b>
BE	4	14	5	<b>23</b>
BG	2	14	2	<b>18</b>
CZ	2	17	5	<b>24</b>
DE	15	33	14	<b>62</b>
DK	4	21	7	<b>32</b>
EE	2	10	3	<b>15</b>
ES	4	21	8	<b>33</b>
FI	5	20	8	<b>33</b>
FR	7	22	14	<b>43</b>
GR	2	9	4	<b>15</b>
HR	3	17	2	<b>22</b>
HU	2	15	5	<b>22</b>
IE	3	19	7	<b>29</b>
IT	5	20	6	<b>31</b>
LT	2	10	3	<b>15</b>
LV	2	10	3	<b>15</b>
MT	2	14	2	<b>18</b>
NL	4	22	8	<b>34</b>
PL	2	15	8	<b>25</b>
PT	3	12	7	<b>22</b>
RO	2	13	2	<b>17</b>
SE	6	20	8	<b>34</b>
SI	1	16	3	<b>20</b>
SK	2	23	4	<b>29</b>
<b>Total</b>	<b>95</b>	<b>431</b>	<b>148</b>	<b>674</b>



**More information:**  
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