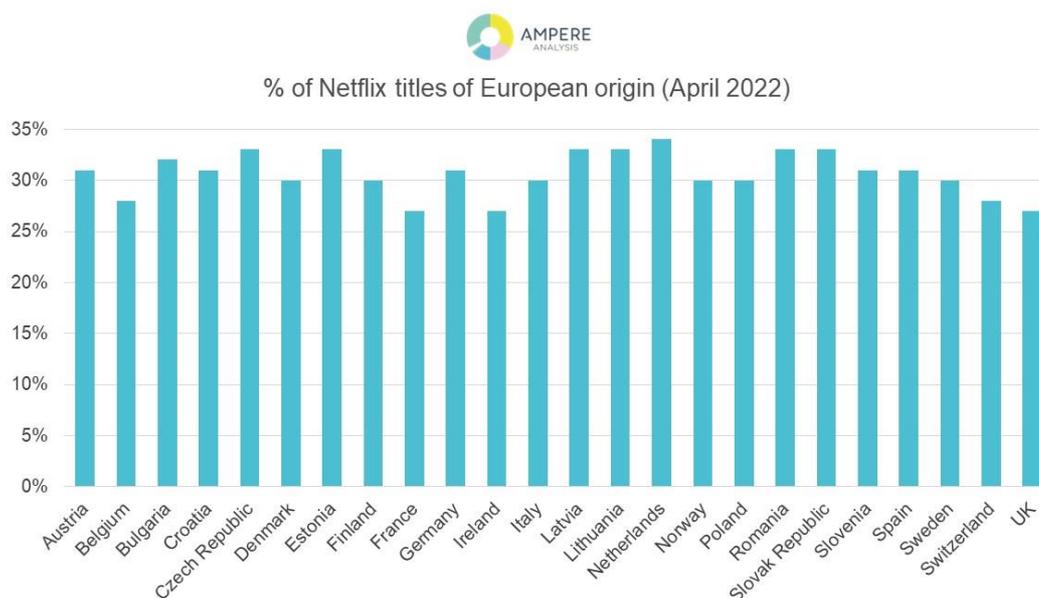


Netflix now at or above 30% European content in almost all major European markets

European content has grown rapidly on streaming platforms over the past few months

London, 6th June 2022: Netflix is now at or above 30% European content in nearly all of its major European markets. The notable exception is the UK and Ireland, where 27% of titles are European. France is also slightly under, as are minor markets Belgium and Switzerland. With European 30% quota regulations for streamers already being introduced in a number of markets, Netflix is now just a 'rounding error' away from meeting requirements across its entire European footprint.

The shift to hit quota is recent. In December 2021, 16 of the 27 markets analysed were under 30% European. Even in the UK, Netflix will hit 30% European with the addition of just 408 European titles (or the removal of 953 non-European). Even fewer would be required for France, Belgium and Switzerland to reach 30%.



Source: Ampere Analytics – SVoD

Netflix is not alone in ramping up the proportion of its content that is European. While Netflix is ahead of its global streaming rivals in programming European content, Amazon also exceeds the 30% quota in Germany, Switzerland and Italy and is on a par with Netflix in the UK with 27% of catalogue titles being of European origin. Other Amazon markets range from 16% to 28% European.

HBO Max also has a large proportion of European titles in its local catalogues, with the majority of its European footprint already exceeding 25% European. Disney still has some way to go, hovering around the 10% European mark. But like other studio and global streamers, Disney has recently been ramping up its European local original production activities.

The change can be viewed from two sides of the fence in terms of success. It either reflects the benefits of regulatory pressure in boosting the acquisition and production of European film and TV by US-based players operating in the region, or it shows how global players are increasingly competing directly with local and regional players with content that was hitherto largely the stronghold of single-market local broadcasters.

Guy Bisson, Research Director at Ampere Analysis says: “Quietly, while no one was watching, Netflix has boosted the proportion of its catalogue titles that are European to the point where meeting new quota regulations should have no negative impact on its regional business. The milestone is a reflection of heavy investment in content outside the US which is rapidly being mirrored by other global streaming players. Perhaps more surprising than Netflix’s 30% milestone is the fact that some of the newer major studio players are already rapidly approaching a similar proportion of European content in their local catalogues.”

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About Ampere Analysis

Founded in January 2015, Ampere Analysis is a new breed of media analyst firm. The company’s experienced team of sector-leading industry analysts specialises in pay and multiscreen TV and next-generation content distribution. Our founders have more than 60 years combined experience of providing data, forecasts and

consulting to the major film studios, telecoms and pay TV operators, technology companies, TV channel groups and investment banks. www.ampereanalysis.com

