

Global SVoD 2019

17.3 million French viewers watched at least one show on an SVoD platform during the last 12 months

SVoD services continue to forge ahead

17.3 million French viewers have watched at least one programme on an SVoD platform in the previous year, up by almost 3 million on the year before. Netflix topped the platform leaderboard as it was chosen by 4 out of 5 SVoD users during the past 12 months. Shared subscriptions to SVOD services are widely used, and each member of the family have their preferred device to watch programmes. Satisfaction rates are high among users and the potential for new subscribers remains significant, especially with new platforms arriving on the market.

“This is the fourth year that we have measured SVoD audiences, and we can now state that the recent evolutions in usage and in audience are significant, despite the fact that television remains the dominant force. SVoD is well-established in households, with users evoking multiple reasons for adopting it, in particular, the user-friendly platforms and the abundance of high quality content,” explained Marine Boulanger, Director of Cinema & Entertainment at Médiamétrie.

Account sharing serves to increase the diversity of the audience

The option to share a subscription is exercised by the majority: 9 out of 10 SVoD users allow family and close friends to take advantage of this. 84% of account sharing is with other family members (spouse, children, brothers and sisters, parents, etc.)

By becoming rooted in the practices and schedules of the youngest users, these SVoD platforms are creating future subscribers, since they will one day leave the parental home and set up their own household.

Every generation can be found watching SVoD programmes, however, the average age stands at a young 34 years. In the past 12 months, nearly half of SVoD users (48%) were 15-34 years old; those aged 35-49 made up ¼ of SVoD users, and almost 1 in 5 SVoD users were over 50 years old.

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SVoD is used on all screens

SVoD audiences exhibit diverse habits in terms of which devices they use to access their platforms, and there seems to be a preferred screen for each generation. Accordingly, parents of young children* primarily watch SVoD programmes on their television set and leave the smaller screens – tablets and smartphones – to their children. To take another example, for young people still living at home* and for independent young people*, a computer is the preferred screen, followed by a smartphone.

For an entire generation, the computer is the no.1 screen: over the past 12 months, 71% of Millennials (those aged 13-34 years) used that device compared to 60% who used their TV. Although the TV is still in the lead overall, 73% of SVoD users and as many as 87% of Millennials used at least one other device.

The flexibility of a subscription to SVoD services (the first month is free) encourages adoption across multiple platforms: on average, SVoD users watch 1.3 platforms. And even though there are several combinations, the common denominator is usually Netflix: 61% and 58% of subscribers to Canal+ Séries and Amazon respectively also watched content on Netflix.

A lasting phenomenon, and part of our mindset

SVoD users are very satisfied with their platforms: on average, they gave a score of 8.4 out of 10. The result: more than 9 out of 10 SVoD users intend to keep on using their SVoD platform, and 10% of them would even consider subscribing to a second SVoD service.

As far as non-subscribers are concerned, close on 3 million internet users say they would consider subscribing to a platform in the next six months. Lastly, 1 in 3 online users stated that they were closely following the impending launch of at least one of the new platforms, with Disney+ topping the list.

2 out of 3 SVoD users value the catalogue of French content that is available, a fact which new services entering the market should bear in mind.

“We will continue to keep a close eye on trends in multiple subscribing, given the upcoming entry onto the market of Salto, Disney+, HBO Max, Peacock and Apple TV+, which may alter the current balance. What we are currently witnessing is that, in the face of these new arrivals, existing platforms are opting for new strategies and yesterday’s competitors are today’s allies,” concluded Marine Boulanger.

* Parents of young children = individuals with one or more children aged under 11 years (= start of secondary school)

* Young people still living at home = under 25 years old and living in the parental home

* Independent young people = under 30 years old and have left the parental home, are living alone or house-sharing with others (who are not relatives or partners)

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What was the most viewed Netflix content in France on computer and mobile during the first half of 2019?

Although all content types were viewed, the results from the first half of the year were clear: the top 9 most watched programmes on Netflix were series, and women were their biggest fans.

Profile of the most viewed content on Netflix in France Computer and mobile during the first half of the year Women's share of the audience (%)



Interpretation guide:

89% of the audience for the series *Shadow Hunters* were women

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About the Global SVoD study

The Global SVoD study focuses on three areas:

SVoD volume statistics: background of the practice, including the number of users, their profiles, viewing duration, viewing times, and a comparison between SVoD consumption and live and catch-up TV consumption. These results come from the SVoD audience survey: Global Video.

Behaviours regarding SVoD: overview of the public's use of subscription video: people's awareness and usage of platforms, and their motivations, intentions to subscribe, satisfaction levels, favourite features, account sharing, etc. The results for the behaviours component were taken from a CAWI online survey conducted between 11 June 2019 and 5 July 2019 among 4,172 internet users aged 6 years and over.

Monthly audience numbers for SVoD content watched on computer and smartphone by internet users aged 2 years and over: most-watched lists available for all programmes, as well as by platform, genre and profile. Results taken from the Total Internet Audience measurement, which is certified by the CESP (France's centre for advertising media research).

About Médiamétrie

The French industry leader in media research, Médiamétrie monitors, measures and analyses audience behaviour and market trends, and fosters the emergence of a benchmark for media data in France. Created in 1985, Médiamétrie is operating in Television, Radio, the Internet (computer, smartphone and tablet), Cinema and the Cross-media sector in France and abroad. Médiamétrie Group generated a turnover of €102.7 million in 2018.

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