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VOD market in the United States

Rynek VOD w Stanach Zjednoczonych

ABSTRAKT

Rynek VOD (video on demand) rozwija się w Stanach Zjednoczonych bardzo dynamicznie od kilkunastu już lat. Do wiodących serwisów streamingowych takich jak Netflix, Amazon Prime Video i Hulu dołączyły w ostatnich kilku latach kolejne platformy VOD. Konkurencja na tym rynku jest więc ogromna, a walka o każdego widza staje się nadrzędnym celem każdego z serwisów. Jednak duża liczba serwisów VOD nie jest korzystnym zjawiskiem dla widzów i wiąże się z koniecznością dokonania wyboru. Artykuł stanowi analizę obecnego rynku VOD w Stanach Zjednoczonych.

SŁOWA KLUCZOWE: VOD, video on demand, telewizja, rynek filmu

The VOD (video on demand) market in the United States has been developing very dynamically for several years. Over the past few years, more VOD platforms have joined leading streaming services such as Netflix, Amazon Prime Video, and Hulu, including CBS All Access, HBO Now, Showtime, as well as Disney+, Apple TV+, Peacock, and HBO Max. The competition in this market is, therefore, huge, and the fight for each viewer becomes the overriding goal of each platform. This is noteworthy because only a large number of viewers, and hence subscribers, can maintain the service in the business. However, a vast number of VOD services is not a favorable phenomenon for viewers. Buying multiple subscriptions and having access to various services at the same time is not profitable, so viewers most often choose which platforms they use. This, in turn, restricts access to some content. From a few favorite series, they have to choose only those that are in the library of the selected platform. Subscriptions purchased, for example, on Netflix and Apple

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TV+ do not allow viewers to watch content to which, for example, HBO has the rights. Until a few years ago, a popular practice was to grant licenses to selected content, often appreciated by viewers². It was a good way to attract viewers to the new VOD service, and an effective way of additional income for the owner of property rights. After some time, however, film studios noticed that licensed content, due to its popularity, constantly maintained viewers' interest in selected VOD platforms. Thus they also decided to use it by creating their own VOD services. Hence, the licenses for the renowned series were not extended³. One of the most important examples of this type of policy was the non-renewal of the license to broadcast the series *Friends*, *Big Bang Theory* and *The Office* on Netflix. *Friends* and *Big Bang Theory* are available from 2021 on HBO Max, owned by Time Warner Inc. *The Office*, on the other hand, found its way to the Peacock service being part of NBC Universal. The decisions of two media giants caused Netflix to forfeit three important titles which generated significant profits for the platform and attracted new viewers⁴. Naturally, it's not just licensed content that attracts viewers' interest. It is the so-called „originals“, i.e. original productions of the streaming services. A popular show like *House of cards* was the first original Netflix production that attracted millions of viewers around the world. After the success of *House of cards*, Netflix began to develop new proprietary formats, including *Orange is the New Black* or *Narcos*, which aroused the interest of viewers. Other streaming services have started producing original content as well. VOD services began to expand their libraries⁵.

Currently, the American VOD market is fighting for every viewer. Streaming services compete in creating new and sharing archival content that can attract subscribers. The largest of them is currently Netflix, which regardless of losing several iconic productions, has not lost its position as the leader of the VOD market in the United States. Netflix is followed by Disney+⁶. However, the competition between streaming services will reach another level given that the VOD market will soon be changed by the merger of giants, i.e. Warner Media (owned by AT&T) and Discovery. The merger will be called Warner Bros. Discovery. The merger of the companies is expected to allow it to compete more effectively with other media giants such as Netflix and Disney. The deal is expected to be approved in the first half of 2022⁷.

² <https://www.streamingmedia.com/Articles/ReadArticle.aspx?ArticleID=125704> (02.08.2021).

³ <https://www.fff.org/pl/deeplinks/2021/04/what-movie-studios-refuse-understand-about-streaming> (02.08.2021).

⁴ <https://www.theverge.com/2019/5/14/18623037/disney-hulu-netflix-warnermedia-att-friends-the-office-this-is-us-streaming> (03.08.2021).

⁵ <https://edition.cnn.com/2018/10/18/entertainment/netflix-finales/index.html> (03.08.2021).

⁶ <https://www.nytimes.com/2021/04/20/business/media/netflix-subscribers-earnings.html> (03.08.2021).

⁷ <https://www.theverge.com/2021/6/1/22448140/warner-bros-discovery-warnermedia-new-name-merger-att> (02.08.2021).

Currently, the US media market is one of the most developed, mature, and rapidly changing markets in the world. The main aim of the undertaken research was to characterize the VOD market in the USA. In this paper, the research method known as the literature review was used. To analyze the VOD market, press publications from leading electronic press titles dealing with the audiovisual market were also reviewed. Moreover, official news published on the websites of particular streaming platforms were also analyzed.

The performed review of literature on the subject of VOD pointed to several researchers who deal with this subject in Poland. Firstly, it is worth pointing out the broadest compendium of knowledge concerning the *video on demand* topic in Poland, which was written by Alicja Jaskiernia from the University of Warsaw. The publication entitled *Od telewizji masowej do Netflixa. Telewizja w Stanach Zjednoczonych w epoce cyfrowej*⁸ from 2016 is the most detailed study of the topic of *video on demand and American television* made by a Polish academic. Małgorzata Bogunia-Borowska's publication *Fenomen telewizji. Interpretacje socjologiczne i kulturowe*⁹ due to its accurate observations on the evolution of television was also very helpful. Another title that inspired the writing of this article was the publication of Manuel Castells entitled *Spółeczeństwo sieci*¹⁰ and *Władza komunikacji*¹¹. Moreover, Henry Jenkins' publication entitled *Kultura konwergencji. Zderzenie starych i nowych mediów*¹² provides a basis for analyzing the changes occurring in the contemporary media. Other publications that proved to be useful in analyzing the VOD market in the USA were *Binge-watching: Video on demand, quality TV and mainstreaming fandom* by Mareika Jenner¹³, *Netflixed: The Epic Battle for America's Eyeballs* by Gina Keating¹⁴, and *On-Demand culture. Digital Delivery and the future of movies* by Chuck Tryon¹⁵.

The article provides a current and in-depth analysis of the VOD market in the USA, with its main aim to present the positive and negative aspects related to the phenomenon of the VOD streaming platforms' development, along with the changes and the current situation in the American VOD market.

⁸ A. Jaskiernia, *Od telewizji masowej do Netflixa. Telewizja w Stanach Zjednoczonych w epoce cyfrowej*, Uniwersytet Warszawski, Warszawa 2016.

⁹ M. Bogunia-Borowska, *Fenomen telewizji. Interpretacje socjologiczne i kulturowe*, Wydawnictwo Uniwersytetu Jagiellońskiego, Kraków 2012.

¹⁰ M. Castells, *Spółeczeństwo sieci*, PWN, Warszawa 2008.

¹¹ M. Castells, *Władza komunikacji*, PWN, Warszawa 2013.

¹² H. Jenkins, *Kultura konwergencji – zderzenie starych i nowych mediów*, Wydawnictwa Akademickie i Profesjonalne, Warszawa 2007.

¹³ M. Jenner, *Binge-watching: Video-on-demand, quality TV and mainstreaming fandom*, Anglia Ruskin University, Anglia 2015.

¹⁴ G. Keating, *Netflixed: The Epic Battle for America's Eyeballs*, Pearson 2012.

¹⁵ Ch. Ryon, *On-Demand culture. Digital Delivery and the future of movies*, Rutgers University Press 2013.

Netflix is the leader of the global VOD market

Created in 1997 in California, Netflix is a pioneering example of how to create the world's largest VOD service with millions of subscribers from a rental DVD. This year marks 13 years since Netflix transformed its business model into a VOD platform for movies, series and online shows. The strength of Netflix lies in proprietary productions, „originals”, and licensed content¹⁶. The most popular original productions of the service in 2021 include the following series: *Bridgerton*, *Witcher*, *Stranger Things*, *Queen's Gambit*, *Sweet Tooth* and films: *Bird Box*, *Extraction*, *Murder Mystery*, *6 Underground* and *Spenser Confidential*. Among the original non-English-language productions, the following series are worth mentioning: *Lupine* (French), *The Money Heist* (Spanish) and *The Platform* (Portuguese)¹⁷.

The American Netflix library has over 3,700 movies and over 2100 tv shows¹⁸. Netflix currently has 74 million subscribers in the United States and Canada, according to a study published by Statista¹⁹. Netflix acquired 4 million new subscribers in the first quarter of 2021, although it was expected to acquire 6 million during this time²⁰. For comparison, in the same quarter of 2020, Netflix acquired almost 16 million new subscribers. Netflix also lost 400,000 subscribers²¹ in the second quarter of 2021. Despite losing some audience and having fewer new users, in 2021 the number of Netflix subscribers worldwide has surpassed 209 million, with around 66 million in the United States, making it a leader in the VOD market²². Its revenues now amount to over \$ 7 billion²³. In addition, Netflix CEO decided to provide a video game business idea. And with that, Netflix is set to enter the world of mobile gaming in 2021²⁴.

¹⁶ <https://www.businessinsider.com/streaming-comparison-netflix-leads-rivals-in-original-tv-shows-2020-6?IR=T> (03.08.2021)

¹⁷ <https://www.nytimes.com/2019/10/17/business/media/netflix-top-ten-movies-tv-shows.html> (04.08.2021)

¹⁸ <https://blog.reelgood.com/netflixs-us-library-has-shrunk-by-more-than-5000-titles-in-less-than-10-years> (04.08.2021)

¹⁹ <https://www.statista.com/statistics/250937/quarterly-number-of-netflix-streaming-subscribers-in-the-us> (05.08.2021)

²⁰ <https://variety.com/2021/digital/news/netflix-q1-2021-media-earnings-1234955952> (28.07.2021)

²¹ <https://thehill.com/homenews/media/564120-netflix-loses-400k-subscribers-in-us-canada-blames-covid-19-for-lumpiness-in> (05.08.2021)

²² <https://www.statista.com/statistics/250934/quarterly-number-of-netflix-streaming-subscribers-worldwide> (29.07.2021)

²³ <https://www.cnbc.com/2021/07/20/netflix-nflx-q2-2021-earnings.html> (30.07.2021)

²⁴ <https://www.bloomberg.com/news/articles/2021-07-14/netflix-plans-to-offer-video-games-in-expansion-beyond-films-tv> (30.08.2021)

Amazon Prime Video

Amazon Prime Video service currently has over 175 million²⁵ users. Although it was created 10 years ago, it has undergone various changes in recent years. It wasn't until 2016 that it became available in 200 countries outside the United States. Its library is full of both original productions, so-called Prime Originals, and licensed content²⁶. Notable titles available include *The Boys*, *Jack Ryan*, *The Marvelous Mrs Maisel*, *Outlander*, *Hunters*, *The Man in the High Castle*, and *Fleabag*. *The Downton Abbey* historical series was also available on Amazon Prime until the end of June 2021, because Amazon lost its streaming rights to NBCUniversal's service Peacock²⁷. However through an agreement with Viacom, which controls Comedy Central, MTV and Nickelodeon, Amazon Prime Video has a variety of comedy items and children's content in its inventory²⁸. From 2015 to May 2020 Amazon Prime subscribers could have also streamed and downloaded all of *The Sopranos*, *The Wire*, *Entourage*, *Curb Your Enthusiasm*, and *Sex and the City*²⁹. These shows are available exclusively on the HBO service. A movie produced by Amazon Studios titled *The Sound of metal* has also been recognized by the film industry. It received 12 Academy Award nominations and won two Oscars³⁰. Amazon is beginning to invest more in international content including *The Stand* (Canada), *Guerra de Likes* (Mexico), *The Great Escapists* (United Kingdom), *La Templanza* (Spain), and *We Children from Bahnhof Zoo* (Germany)³¹.

Amazon Prime Video will broadcast exclusively *Thursday Night Football* beginning in 2023³². The 11-year deal makes Amazon Prime Video the first streaming service to secure prestigious national broadcast packages from the NFL (National Football League), after streaming select games, in addition to their network broadcasts³³.

²⁵ <https://www.indiewire.com/2021/04/amazon-prime-video-subscribers-streaming-more-jeff-bezos-1234634323> (02.08.2021).

²⁶ <https://observer.com/2020/07/netflix-amazon-disney-plus-hbo-max-apple-tv-hulu-original-licensed-shows> (02.08.2021).

²⁷ <https://www.distractify.com/p/what-happened-to-downton-abby-on-prime> (03.08.2021).

²⁸ <https://www.narcity.com/these-11-throwback-nickelodeon-shows-are-available-right-now-on-amazon-canada-prime-video#toggle-gdpr> (03.08.2021).

²⁹ <https://decider.com/2020/05/22/hbo-shows-leave-prime-video-the-sopranos-entourage-the-wire> (03.08.2021).

³⁰ <https://edition.cnn.com/style/article/sound-of-metal-nicolas-becker-mikkel-nielsen-sound-design-spc-intl/index.html> (03.08.2021).

³¹ <https://agoodmovietowatch.com/amazon-prime/best-foreign> (04.08.2021).

³² <https://www.cnbc.com/2021/05/03/amazons-thursday-night-football-package-will-begin-in-2022-instead-of-2023.html> (04.08.2021).

³³ <https://www.aboutamazon.com/news/entertainment/amazon-prime-video-will-be-home-to-nfls-thursday-night-football> (04.08.2021).

Hulu

The streaming service Hulu was founded in 2007. It is owned by Walt Disney Direct to Consumer International (67% share) and Comcast, which owns NBCUniversal (33% share). Hulu has an estimated total viewership of 99.7 million viewers, including 39.4 million paying subscribers. Hulu brings in \$2.7 billion in annual advertising revenue and accounts for 15% of SVOD (subscription video on demand) streaming activity in the US, which makes it the third most popular service in the country (behind Netflix and Amazon Prime Video)³⁴. Hulu's proposed content includes ABC, NBC and Fox programming, as well as a library with shows and series from E!, A&E, PBS, Fox Sports 1 and 2, Big Ten Network, Bravo, Syfy, USA Network, NFL Network, Oxygen, Sundance TV and NBCSN³⁵.

Hulu's line up includes both original productions and licensed content³⁶. Some of the service's most popular series include *Castle Rock*, *Harlots*, *Shrill*, *Helstrom*, *Party Down*, *High Fidelity*, *Woke*, *PEN15*, *Little Fires Everywhere*, *Marvel's Runaways*, *The Handmaid's Tale*, and *Veronica Mars*³⁷. Series *Ramy* and *The Act* both won Golden Globe awards³⁸. Hulu also produced some original movies, such as *Happiest Season*, *Palm Springs* (which was nominated for a Golden Globe), and *Run*³⁹. Hulu's documentary section features a lot of celebrity biopics: from The Beatles to B.B. King. Fashion documentaries on the service include *The First Monday in May*, *Dior and I*, *Diana Vreeland: The Eye Has to Travel*, and *McQueen*⁴⁰.

In the third quarter of 2021, The Walt Disney Company revealed that Hulu had 42.8 million paid subscribers, up from 35.5 million in the corresponding quarter of the previous fiscal year⁴¹. Hulu ranks last on the podium of VOD services with the most subscribers in the United States⁴².

HBO Max

The HBO Max service was launched in 2020. It is a serious competitor to Netflix, Disney+ and Hulu due to its library. For its subscribers, HBO Max provides whole seasons of many popular shows like *Friends*, *The Sopranos*, *Westworld*, *Curb Your*

³⁴ <https://blog.reelgood.com/q4-2020-vod-streaming-report> (03.08.2021).

³⁵ Harchitwan L., *Unboxing Hulu: a tale of strategic alliance to survive in the sharing world*, <https://www.inderscienceonline.com/doi/abs/10.1504/JGBA.2020.111015> (04.08.2021).

³⁶ <https://www.hulu.com/content?tab=featured> (04.08.2021).

³⁷ <https://www.hulu.com/content?tab=tv> (04.08.2021).

³⁸ <https://www.nbcnews.com/pop-culture/awards/live-blog/golden-globes-2020-winners-speeches-red-carpet-moments-more-n1109986/ncrd1110931#liveBlogHeader> (05.08.2021).

³⁹ <https://press.hulu.com/guides/hulu-originals> (05.08.2021).

⁴⁰ <https://press.hulu.com/show-types/originals/#documentaries> (05.08.2021).

⁴¹ <https://www.statista.com/statistics/258014/number-of-hulus-paying-subscribers/> (05.08.2021).

⁴² <https://observer.com/2021/02/netflix-vs-disney-plus-hulu-esp-plus-subscribers-differences> (05.08.2021).

Enthusiasm and *Veep*⁴³. HBO channels, including HBO Max, are owned by the media conglomerate Time Warner Inc. (owned by AT&T as of 2018)⁴⁴. Time Warner owns brands such as CW, AOL, New Line, CBS, CNN, TNT, TCM (Turner Classic Movies), Adult Swim, Rooster Teeth, Looney Tunes, Criterion, Studio Ghibli, Cartoon Network, DC Comics, Warner Bros, HBO, and many others⁴⁵. For example, some of the CW's productions include *The Originals*, *Vampire Diaries*, *Arrow*, *Supernatural*, *Jane the Virgin*, as well as older, popular series such as *Smallville*, *Gossip Girl* and *Dawson's Creek* series. Additionally, the DC Extended Universe (DCEU), a franchise that mainly includes superhero movies produced by Warner Bros and based on DC Comics, is a part of the streaming giant. Some of the DCEU titles include *Superman*, *The Dark Knight*, *Batman*, *Joker*, *Green Lantern*, *Aquaman*, *The Flash*, *Wonder Woman*, *Wonder Woman 1984*, *Birds of prey*, *Suicide Squad*, *The Justice League*, *Shazam*, and the older but still popular *Constantine* movie⁴⁶.

Other superhero movies announced in 2021 to have premieres in the following years are *Aquaman and the Lost Kingdom* (in 2022), *Peacemaker* (in 2022), and in 2023 *Batgirl*, *Blue Beetle*, *Super girl* and *Green Lantern Corps*⁴⁷.

HBO's Max archive also includes many acclaimed and award-winning films, including *When Harry met Sally*, *The Aviator*, *Black Hawk Down*, *Breaking the Waves*, *Good Fellas*, *The Departed*, *The Lord of the Rings*, *Dunkirk*, as well as such cinema classics as *Singin' in the Rain*, *Cabaret*, *Casablanca*, *Citizen Kane*, *Rocky*, *The Fugitive* and *Mean Streets*. Among the HBO Max series worth noting are *Doctor Who*, *Rick and Morty*, *The Big Bang Theory*, *Sesame Street*, and *The West Wing*⁴⁸.

The show *Friends* was available on Netflix until the end of 2020. The license for the show, which is loved by viewers all over the world⁴⁹, expired and the rights to the series were purchased for \$425 million by Warner Media, even though Netflix put a lot of effort for the series to remain in its library as *Friends* continued to attract new subscribers to the service and remained popular among younger and older viewers⁵⁰. It was probably assumed that *Friends* would also attract viewers to the new HBO Max service similarly. In addition, one of the highlights of HBO Max in 2021 was the airing of a special episode of *Friends*, *the Friends Reunion* with guest appearances from the stars of the series. HBO Max has not disclosed, for now, the US audience numbers for the special episode which aired in May 2021. In the UK,

⁴³ <https://www.latimes.com/entertainment-arts/business/story/2020-05-21/hbo-max-streaming-marketing-coronavirus-warner-media> (05.08.2021).

⁴⁴ <https://www.bbc.com/news/business-57139433> (05.08.2021).

⁴⁵ <https://www.warnermedia.com/us/brands> (05.08.2021).

⁴⁶ <https://www.digitalspy.com/movies/a25604201/dceu-timeline-worlds-of-dc-movies-in-order> (06.08.2021).

⁴⁷ <https://collider.com/upcoming-dc-movies> (06.08.2021).

⁴⁸ <https://www.nytimes.com/2021/04/01/arts/television/best-movies-tv-shows-amazon-hbo-max-hulu.html> (06.08.2021).

⁴⁹ <https://edition.cnn.com/2021/05/29/entertainment/friends-international-fandom-scli-intl/index.html> (06.08.2021).

⁵⁰ <https://www.foxbusiness.com/lifestyle/425-million-hbo-max-spent-friends-working> (02.08.2021).

the episode premiered on the Sky One channel (Comcast owned network) and only there it did exceed 5 million viewers. In the last two years, *Friends* was the mostwatched programme on this channel. It was also second only to the final series of *Game of Thrones* for the biggest audience ever across Sky's portfolio of entertainment channels⁵¹. These figures show how important *Friends* show is as a production.

However, *Friends* is not the only TV production that strengthens interest in the service. The strength of HBO Max lies in its large library, which not only includes famous movies and shows but also well-known names of creators to encourage viewers to watch new productions. Among the most famous names, such directors as J. J. Abrams, Steven Soderbergh, Zack Snyder, Joss Whedon, Mindy Kaling and Greg Berlanti can be provided. At the same time, it is worth mentioning that HBO MAX launched in 2020 with 10000 hours of curated content⁵². The company has 67.5 million subscribers to HBO and HBO Max, with 47 million in the United States⁵³. Currently, HBO Max cannot be accessed in Europe. Warner Media announced in March 2021 that there would be a delay in the launch of HBO Max in Europe, as it focuses efforts on Latin America⁵⁴. Additionally, a merger between AT&T's media assets and Discovery is planned to create Warner Bros. Discovery⁵⁵. According to Discovery, the merger will provide HBO Max with greater insights into the needs of the European market⁵⁶.

Disney+

The streaming service Disney+ was created in 2019. The Disney conglomerate brings together several media companies and partnerships, including Touchstone Pictures, ESPN, Lucas Film, Fox Entertainment Group, which includes 20th Century Fox (the Disney conglomerate owns the studio as of March 2019 and Fox Sports, as well as National Geographic, Walt Disney Studios, Marvel Entertainment and Disney ABC Television Group)⁵⁷. The Walt Disney Company reported that Disney+ had 116 million subscribers worldwide as of its third quarter of 2021⁵⁸. In the US Disney+

⁵¹ <https://www.skygroup.sky/article/the-one-where-friends-the-reunion-becomes-sky-one-s-most-watched-show-ever> (02.08.2021).

⁵² <https://www.nytimes.com/2020/05/26/business/media/hbo-max-netflix-streaming.html> (02.08.2021).

⁵³ <https://www.nytimes.com/2021/07/22/business/media/hbo-max-jason-kilar.html> (05.08.2021).

⁵⁴ <https://www.digitaltveurope.com/comment/is-warnermedia-wise-to-delay-the-european-hbo-max-rollout/> (27.07.2021).

⁵⁵ <https://www.businessinsider.com/how-warner-bros-discovery-would-compare-to-netflix-disney-others-2021-8?IR=T> (04.08.2021).

⁵⁶ <https://www.digitaltveurope.com/comment/is-warnermedia-wise-to-delay-the-european-hbo-max-rollout> (05.08.2021).

⁵⁷ <https://www.investopedia.com/articles/financial-theory/11/walt-disney-entertainment-to-empire.asp> (02.08.2021).

⁵⁸ <https://www.statista.com/statistics/1095372/disney-plus-number-of-subscribers-us> (06.08.2021)

has 40 million US subscribers⁵⁹.

The Disney+ platform archive includes such well-known and popular animated films produced by Pixar Studios as *Toy Story*, *Cars*, *Onward*, *Finding Dory*, *A Bug's Life*, *Monsters Inc.*, *Incredibles*, *Inside out*, *Coco*, *Up*, *Ratatouille*, *Finding Nemo*, *Wall-E* and *Star Wars* saga⁶⁰. Disney+ is also responsible for the production of films in the Marvel Cinematic Universe (MCU). Within the MCU, the best-known titles include *Iron Man*, *Thor*, *The Avengers*, *Captain America*, *The Incredible Hulk*, *Doctor Strange*, *Black Panther*, *Spider-Man*, *Ant-Man* and *Guardians of the Galaxy*⁶¹.

In February 2021 Disney launched Star, a new adult-focused branded programming within Disney+ for international audiences. Star offers R-rated movies and other shows and movies that don't belong to Disney+ family-friendly image. Star has been launched in Canada, New Zealand, Australia, parts of Europe and Singapore⁶².

It brings Disney-owned movies and shows from FX, ABC, ESPN, Fox to Disney+ subscribers outside of the US⁶³. Disney has a large collection of R-rated movies and shows for older audiences thanks to its acquisition of 21st Century Fox and ABC's stream of primetime dramas. This library includes shows like *Scandal*, *The Mandalorian*, *How I met your mother*, *Family Guy* and *Grey's Anatomy*, as well as blockbuster movies like *Die Hard*, *Borat*, *Con Air*, *Glee*, *Planet of the Apes*, *Good Morning Vietnam* and *Deadpool*. Viewers in the US can already stream most of that library on Hulu, but Hulu isn't available outside of the US and Japan⁶⁴.

Disney is also a joint venture co-owner of A&E (50% owned, remaining 50% owned by Hearst Corporation), The History Channel (50% owned, remaining 50% owned by Hearst Corporation) and Lifetime (50% owned, remaining 50% owned by Hearst Corporation). In the third quarter of 2021, Disney+ reportedly generated average monthly revenue of USD 4.16 per paying subscriber. This marks a decrease from the USD 4.62 recorded for the third quarter of 2020⁶⁵.

⁵⁹ <https://www.nexttv.com/news/disney-plus-has-around-40-million-us-subscribers-report> (05.08.2021)

⁶⁰ <https://www.businessinsider.com/pixar-movies-on-disney-plus?IR=T> (04.08.2021)

⁶¹ <https://www.marvel.com/movies> (03.08.2021)

⁶² <https://www.theverge.com/2021/2/23/22291848/disney-plus-star-launch-europe-canada-international-streaming-hulu-breakdown> (02.08.2021)

⁶³ <https://thedisinsider.com/2021/05/17/disney-to-close-uk-irish-fox-channels> (03.08.2021)

⁶⁴ <https://www.businessinsider.com/disney-plus-star-streaming?IR=T> (06.08.2021)

⁶⁵ <https://www.statista.com/statistics/1115395/disney-plus-average-revenue-per-subscriber-worldwide> (06.08.2021)

Peacock

The Peacock service was launched in 2020. It is a US video streaming service owned by the television and streaming division of NBC Universal, a subsidiary of Comcast. Comcast owns NBC, Sky, Universal Studios, Dream Works and many other brands⁶⁶. The Peacock library includes shows such as *Saturday Night Live*, *Downtown Abbey*, *Modern Family*, *Married with Children*, *Frasier*, *Law and Order*, *Parks and Recreation*, *The Office*, and original series such as *Girls5Eva*, *Curious George*, *Cleopatra in Space*, and *Rutherford Falls*⁶⁷. Free and premium versions of Peacock were launched in July 2020. There is also an ad-supported Peacock Premium⁶⁸.

Peacock offers a large library of Universal films such as *Fast & Furious*, *Jurassic Park*, as well as classic films such as *Schindler's List* and *E.T.* Films from other studios such as *Harry Potter* are also included in the library from time to time⁶⁹. Starting in 2022, the service will be the streaming home for brand new Universal films⁷⁰. In July 2021, Comcast reported that 42 million viewers have registered with Peacock since its launch⁷¹. Peacock also offers live sports, including regularly scheduled NHL games, Premier League matches and MLB broadcasts. Following their theatrical windows, movies from DreamWorks Animation, Illumination, Universal and Focus Features will be available exclusively on Peacock for four months⁷².

Apple TV+

Apple TV+, Apple's premium subscription streaming service, was launched in November 2019 in the US and in more than 100 other countries, including Poland⁷³. It features original shows and movies. Apple TV+ has a line up of high-end originals, such as *Ted Lasso*, *the Sundance Film Festival award-winning CODA*, *For All Mankind*, *Dickinson*, *See*, *The Morning Show*, *Servant*, *See*, *Hall*, *Ghost Writer*, *Helpsters*, *Greyhound*, *Beastie Boys Story*, *Little America*, *Tha Banker*, *Amazing Stories*, *Home Before Dark*, *The Truth*, *Helpsters*, and *Snoopy in Space*. His original series *The Morning Show* was nominated for a Golden Globe Award⁷⁴. Apple TV+

⁶⁶ <https://www.nbcuniversal.com/press-release/nbcuniversal-unveils-peacock-free-premium-ad-supported-streaming-service-subscription> (04.08.2021).

⁶⁷ <https://www.peacocktv.com/unavailable> (04.08.2021).

⁶⁸ <https://variety.com/2020/digital/news/peacock-ads-inventory-streamers-1234697656> (03.08.2021).

⁶⁹ <https://www.vulture.com/article/best-movies-peacock-streaming.html> (03.08.2021).

⁷⁰ <https://edition.cnn.com/2021/07/06/media/universal-peacock-movies/index.html> (04.08.2021).

⁷¹ <https://www.businessinsider.com/peacock-streaming-service?IR=T> (06.08.2021).

⁷² <https://theathletic.com/2352425/2021/01/28/nbc-peacock-sports-fans> (05.08.2021).

⁷³ <https://www.apple.com/pl/newsroom/2019/05/all-new-apple-tv-app-available-in-over-100-countries-starting-today> (04.08.2021).

⁷⁴ <https://www.apple.com/pl/apple-tv-plus> (04.08.2021).

does not offer access to new blockbuster movies or favourite classics, but it is a service that focuses on high-budget original content⁷⁵. Apple TV+, with its Apple Originals program, is devoted entirely to the original content.⁷⁶This includes shows, movies, and documentaries featuring famous Hollywood names.

It has been estimated that the number of Apple TV+ users will grow from 33.6 million users at the end of 2019 to a projected 40 million by the end of 2021. It is worth noticing that these numbers do not necessarily reveal how many paying subscribers used the service, as Apple TV+ was available for free for a year with the purchase of new Apple devices⁷⁷. However, starting in July 2021, Apple is no longer providing a free year of streaming service with purchases. Instead, it offered 3 months⁷⁸.

CBS All Access/Paramount+

CBS All Access was a streaming service that has been launched in 2014. It was owned by CBS Interactive. In 2019 CBS merged with Viacom. CBS brought to the new company Showtime, CBS Network and CBS All Access channels, whereas Viacom brought Comedy Central, Paramount Pictures, MTV and Nickelodeon⁷⁹.

Paramount+ is a subscription streaming-video service that has been launched in March 2021 as a revamp of CBS All Access. As part of the rebrand, Paramount+ received five new original series from different verticals across the company, including Paramount, CBS, MTV, BET, Comedy Central, MTV, Nickelodeon, and Smithsonian, as well as films from Paramount Pictures⁸⁰.

Some new titles include *The Offer*, a new iteration of MTV's *Behind The Music*, and a revival of *The Game*⁸¹. The streaming service already features several original shows and movies. Paramount+ has got a library of over 2,500 movies and 30,000 TV episodes, including content based on popular franchises like *SpongeBob* and *Star Trek*⁸². Additionally, brand new Paramount films will also be available to stream from 30 to 45 days after their premiere in theatres, while other Paramount films will be introduced to the online service as soon as 90 days after they would be

⁷⁵ <https://www.androidauthority.com/apple-tv-plus-969001> (02.08.2021).

⁷⁶ <https://www.apple.com/tv-pr/originals> (03.08.2021).

⁷⁷ <https://www.statista.com/statistics/1136261/number-of-apple-tv-plus-subscribers-us> (02.08.2021).

⁷⁸ <https://www.theverge.com/2021/6/21/22544099/apple-tv-plus-one-year-free-ending-three-months> (05.08.2021).

⁷⁹ <https://www.cnn.com/2020/07/29/viacombcs-to-rebrand-cbs-all-access-keep-price-the-same.html> (04.08.2021).

⁸⁰ <https://www.theverge.com/2021/2/24/22299615/paramount-plus-launch-date-price-cbs-all-access-shows-movies> (03.08.2021).

⁸¹ <https://variety.com/2021/tv/news/the-offer-paramount-plus-cast-1235015143> (05.08.2021).

⁸² <https://www.businessinsider.com/paramount-plus-original-movies-shows?IR=T> (06.08.2021).

available in cinemas⁸³. *A Quiet Place Part 2* became available to stream on Paramount+ on July 13, a month and a half after its theatrical premiere⁸⁴. Shows like *The Twilight Zone*, *The Good Fight*, *The Stand*, *Younger*, *Texas 6*, *Tell Me a Story*, *Strange Angel*, and *Thomas John Experience* are, among others, available in Paramount+ library⁸⁵. Paramount+ is also about to revisit other existing series and franchises with new *Star Trek* shows, a reboot of the '90s sitcom *Frasier* and a *Criminal Minds* revival, a prequel to *Yellowstone* called *Y:1883*⁸⁶. Paramount Pictures has also made a deal with Epix to make thousands of legacy movies from a big collection of studios available on Paramount+⁸⁷. Therefore, MGM's new movies will be available on Paramount+ after their full theatrical releases and a window of time when they would be exclusive to Epix. That includes films like *House of Gucci*, *Creed 3* and the new James Bond film, *No Time to Die*. Paramount+' original shows and movies include *Criminal Minds*, *Flashdance*, *Landman*, *Halo*, *Love Story*, *The Mayor of Kingston*, *The Italian Job*, *The Man Who Fell To Earth*, *Parallax View*, *Rugrats*, *Avatar*, *Fairly Odd Parents*, and *Dora the Explorer*⁸⁸. Viacom CBS announced in August 2021, that Paramount+ reached 42 million subscribers worldwide and 19.2 million US subscribers⁸⁹. Paramount+ wants to reach 25 markets by the end of 2021, and it expects to hit 45 markets by the end of 2022⁹⁰.

The future of the VOD market in the USA

There are several key players in the VOD market in the United States. Netflix is the market leader, but there is a strong competition developing around this service in the form of other platforms. They are all competing for viewers who will purchase a paid subscription. Viewers are attracted in different ways. On one hand, they are offered archival content such as the popular show *Friends*, on the other original productions made exclusively for the streaming giants. Sometimes content is broadcasted under license. Others are made available shortly after films premiere in theatres. There are many ways to attract viewers, but the VOD market has become fragmented, which is also an obstacle for the audience. Buying multiple subscriptions to access favourite movies, series and shows is often too much of

⁸³ <https://www.cnet.com/tech/home-entertainment/paramount-plus-to-stream-big-screen-movies-45-days-after-they-hit-theaters> (05.08.2021).

⁸⁴ <https://eu.usatoday.com/story/tech/reviewed/2021/06/07/how-stream-quiet-place-2-paramount-plus/7586467002> (06.08.2021).

⁸⁵ <https://www.paramountplus.com/intl> (06.08.2021).

⁸⁶ <https://www.nexttv.com/news/paramount-plus-to-feature-reboot-filled-streaming-mountain-with-star-trek-sponge-bob-early-movie-debuts> (06.08.2021).

⁸⁷ <https://variety.com/2021/film/news/paramount-pictures-epix-movie-output-deal-1234914288> (06.08.2021).

⁸⁸ <https://www.paramountplus.com/intl> (06.08.2021).

⁸⁹ <https://deadline.com/2021/08/viacomcbs-global-streaming-subscribers-42-million-paramount-plus-1234809133> (05.08.2021).

⁹⁰ <https://www.skygroup.sky/article/viacomcbs-partners-with-sky-to-launch-paramount-in-europe> (06.08.2021).

a financial obstacle. Therefore, it becomes necessary to make a choice. Thus, viewers limit their access to selected content they would like to watch by focusing on productions available on one or two services. The owners of VOD platforms are looking for a way to make the viewers choose their offer. One way is to merge companies and create common platforms with libraries containing content of several corporations. The problem also concerns the creators, who can choose among various VOD platforms that offer them cooperation.

WarnerMedia, which includes CNN, the Warner Bros. film and television studios and the Turner cable networks, is about to become the property of Discovery Inc. as media companies continue to absorb each other up in an effort to take on Amazon, Apple, Facebook and Google.⁹¹ This deal will create the second-largest media business in the United States, behind the Walt Disney Company and ahead of Netflix and NBC Universal⁹². Another issue to be resolved are movie premieres, which, for example on HBO Max, coincide with the release date of movies on the VOD service. This requires developing new models of cooperation with producers and movie stars, whose profits often depend on the number of viewers who watched the movie during the first weekend after the premiere. The content of VOD services and resources of libraries available are also becoming the key factor. The bigger the content, the better the chance to attract viewers.

Additionally, according to the new report, conducted by Ampere Analysis⁹³, there are now more subscriptions to SVoD than people in the 328 million-plus country. Ampere's latest wave of consumer data showed that over one-quarter of US internet users now report using five or more SVoD services. On top of this, 57% of US internet users say that SVoD services are the main way in which they watch TV and films. There are nearly 340 million subscription OTT (over-the-top) contracts to services such as Netflix, Disney+ and HBO Max. In the US over a quarter of American internet users pay for five or more SVoD services⁹⁴.

The video on demand market has rigorous competition among the already established and new emerging market players. The global VOD market size is anticipated to reach over USD 82 billion by 2025⁹⁵.

Of course, the pandemic has significantly affected the way viewers watch movies. Fans of the silver screen have had to resign themselves to watching movies at home. Streaming services took advantage of this and offered premieres of films, previously scheduled for release in theatres, on their platforms. Pandemic changed

⁹¹ <https://www.wsj.com/articles/at-t-to-combine-warnermedia-division-with-discovery-11621250928> (06.08.2021).

⁹² <https://www.nytimes.com/2021/07/22/business/media/hbo-max-jason-kilar.html> (06.08.2021).

⁹³ <https://www.ampereanalysis.com/insight/streaming-subscriptions-in-us-overtake-number-of-people> (06.08.2021).

⁹⁴ <https://www.ampereanalysis.com/insight/streaming-subscriptions-in-us-overtake-number-of-people> (06.08.2021).

⁹⁵ <https://www.statista.com/outlook/dmo/digital-media/video-on-demand/worldwide> (06.08.2021).

the VOD market and its audience in the United States and around the world. Streaming services have become a way to be in touch with culture in terms of movie premieres. But will the viewers who are used to watching film premieres on the screen of a laptop or smart TV be keen to switch to a cinema screen after the pandemic? This raises another question: will cinemas survive? And how will the movie market change in the next few years given the mergers of giants that will soon be finalised? The answers to these questions are yet to be revealed.

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VOD Market in the United States

Summary

The VOD (video on demand) market has been developing very dynamically in the United States for over a dozen years now. Recently, there was a surge in the establishment of new VOD platforms which have joined the leading streaming services such as Netflix, Amazon Prime Video and Hulu. As a result, competition in this market is enormous, and the fight for each viewer becomes the main goal of each streaming giant. However, a large number of VOD services is not a favourable phenomenon for viewers as it is associated with the need to make a choice. This article analyzes the current USA VOD market.

Keywords: VOD, video on demand, television, film market