



# Deliverable 3.5

## Video Data Clustering Report



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# 1 Introduction

The rationale behind *WP3-Hegemony: Platformization of Video* is that the history of audiovisual production is a rich and dynamic one that has changed significantly over the past century, in close connection with the evolution of European cultural industries. As a matter of fact, the birth of cinema itself has been a *watershield* in this history, putting the European hegemony over Western world-system to the test of the US challenge. With this respect, audiovisual is somehow in the middle, between the upstream reign of French and British cultural forms, and the downstream American control of electronic and global mass media – or the simple fact, how Jeremy Tunstall used to put it, that "the media are American" [see Tunstall 1977]. Cinema has been a real battlefield, with France, Germany and Denmark taking the center of the stage until the interwar period, and Hollywood taking over the world right after [Sassoon 2006: 965-971]. For this reason, in this deliverable we will make an aggregate use of data coming from both WP1 and WP3, and respectively related to theatrical movie productions and admissions, in the first case; and to video-on-demand and video sharing platforms, in the second case.

From the early days of silent films and radio dramas to the rise of Hollywood, to the advent of television and more recently to the emergence of online platforms, in fact, audiovisual content has played a key role in shaping our culture and society. With the advent of the internet and the growth of video on demand services as well as online platforms for video sharing, the landscape of audiovisual content has changed dramatically in recent years. The ease of access and distribution made possible by these technologies has opened up new avenues for creativity and has revolutionized the way we consume and experience this type of content. Continuities and discontinuities between theatrical exhibitions and streaming services will be addressed here.

As already stated, we will start by considering the proportions between American and European productions, in both cases of theatrical screening and VODs releasing. The definition of European cinema as such, as Thomas Elsaesser has noted, has been built in opposition with Hollywood: either in terms of authorship, economic funding, marketing strategies or canonization procedures [2005: 491-492]. The role of American cinema as *constitutive other* is possibly a constant of European movie market, on which also this deliverable is premised.

Given these developments, it's more important than ever to understand the patterns of production and consumption of audiovisual content. By studying the history of this form of media, and the impact of the internet and technological advances, we can gain insight into how it has evolved over time and how new technologies and cultural trends have shaped the types of content that are produced and consumed. Understanding the history of audiovisual content and the impact of technology on its production and consumption is crucial for appreciating the role it plays in our society under different points of view. From an economic perspective, the audiovisual industry supports millions of jobs worldwide. From a social perspective, audiovisual content has the power to shape our cultural norms and beliefs, influence public opinion, and bring people together. By understanding the patterns of production and

consumption of audiovisual content, we can gain a deeper appreciation for the impact it has on our lives and the world around us.

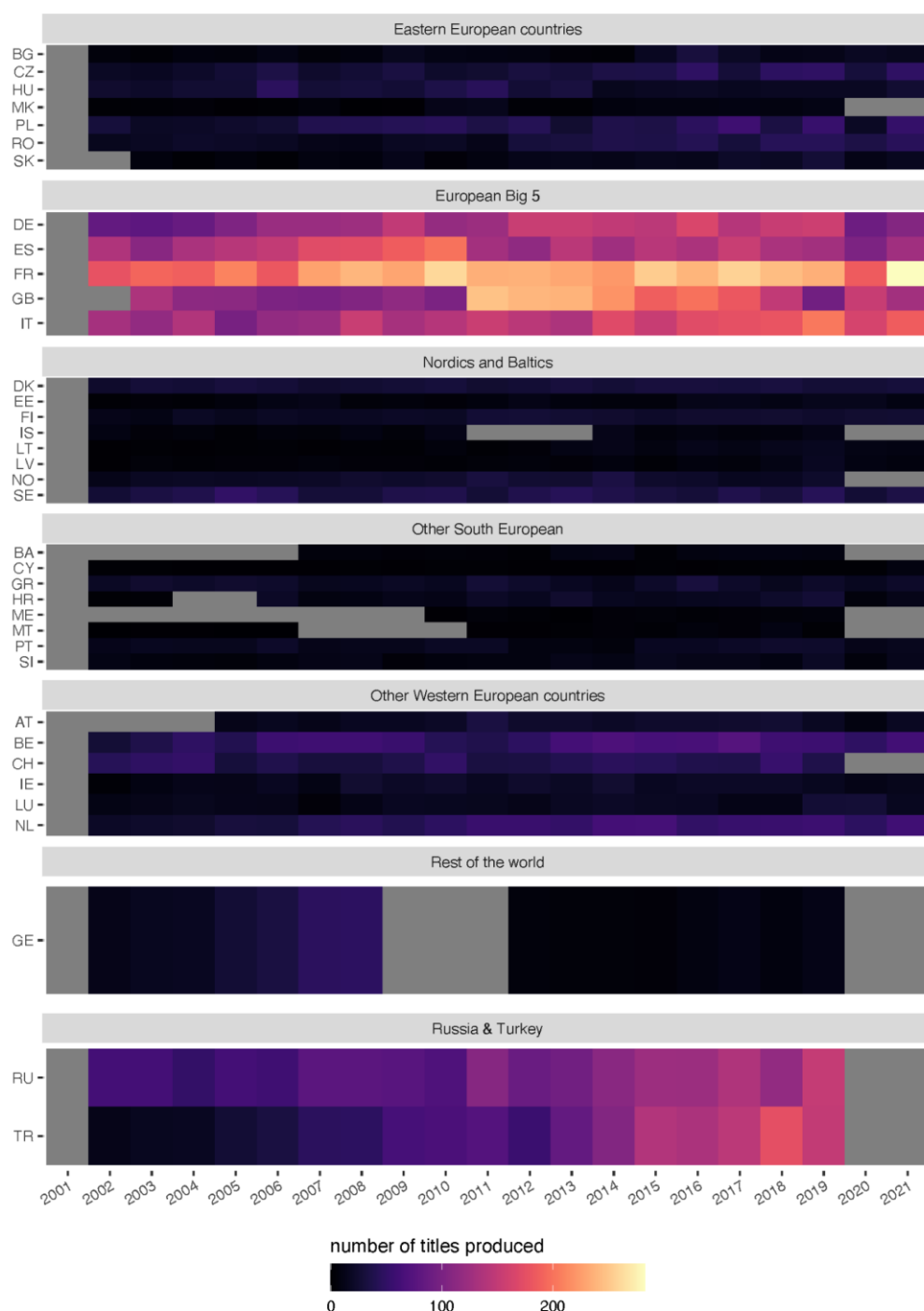
The final clarification is that this is a synthetic deliverable: as expected, in fact, we have worked on the same datasets already used for other deliverables [see D1.3- *Patterns in Movie Production, Distribution and Consumption*; D3.1- *Patterns in Video Production in Ten Countries*; D3.2- *Patterns in Video Consumption in Ten Countries*; D3.4- *Catalogue of Best Practices and Main Obstacles to Europeanization*]. By synthetic, though, we mean *synthetic* in the fullest sense: while historical and cultural trends are discussed in the above-cited reports, here we will put all the data together and take them to a more abstract level – by waiting for the figure to take its shape and reflecting on that form, in the hope that “only the abstract pattern reveals the true nature of historical processes”, in Franco Moretti’s words [2005: 29]. To sum up, deliverables 3.3 and 3.4 are somehow complementary to each other: the first one provides a graphic representation of the main tendencies we could find; and the second one, in a more narrative form, takes into exam their implications and consequences.

## 2 Theatrical Movies

Cinema has played a pivotal role in the dissemination of audiovisual contents throughout the world. From its inception in the late 19th century, cinema has served as a powerful medium for telling stories and conveying ideas, emotions, and experiences. The first motion pictures were shown in makeshift theaters and nickelodeons, and the popularity of these early movies quickly led to the construction of larger and more elaborate cinemas. The golden age of Hollywood in the 1920s and 1930s saw the rise of the studio system, which produced and distributed a steady stream of feature films that captivated audiences around the world. Since then, cinema has continued to evolve and adapt to changing technological, cultural, and economic trends. Despite the advent of television, home video, and the internet, cinema remains an essential part of the global audiovisual landscape, offering a unique and immersive experience that continues to captivate audiences around the world. This is what Francesco Casetti has labeled as *hypertopia*: the contemporary status of cinema, brought to existence by technological innovation, by which the movies have not simply been relocated to a *different* space (which we would rather call a *heterotopian* moment), while being destined to a *plurality* of spaces, simultaneously made available to the spectator [2015: 151-152]. On the one axis, the long-duration scenario of European-American competition; and along the other axis, the fragmentation of movie screening in an endless series of services, devices, and moments: this, in a nutshell, the theoretical framework on which we based our aggregate elaboration of WP1 and WP3 data.

In this context, and for starters, we delve into the evolution of movie production and consumption around the world. Our particular interest lies in comprehending the differences and similarities in the production and consumption of films, as well as the level of public interest in cinema across countries. To accomplish this, we use data retrieved from the European Audiovisual Observatory and the Lumière Database from 1986 to 2021, to analyze three key-aspects of the movie industry in each country: movie production, admission per person, and the number of titles screened over time.

**Figure 1.** Movie production by cluster of countries



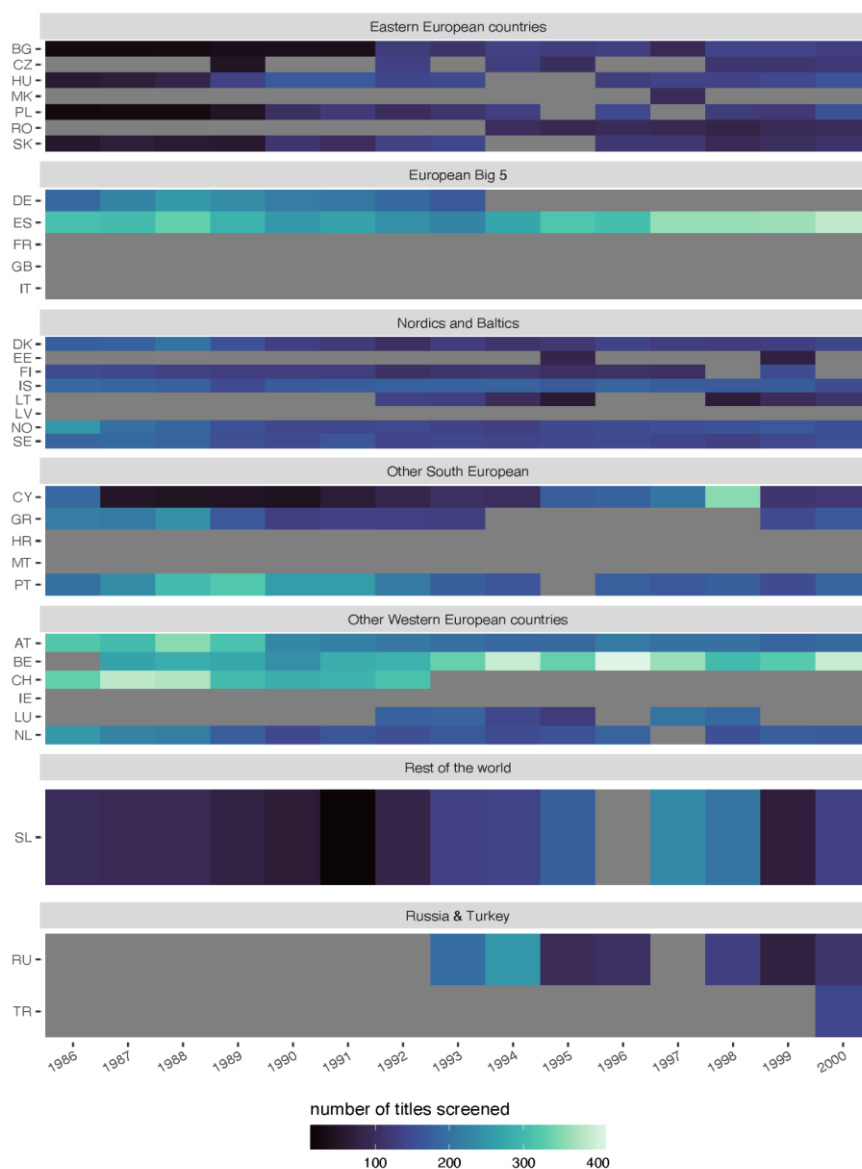
[Source: Elaboration on European Audiovisual Observatory data]

Figure 1 displays the number of movie titles produced in European and non-European countries from 2001 to 2021. The countries dominating the production of content are Germany, Spain, France, the United Kingdom, and Italy, collectively known as the "European Big 5" – probably in assonance with the Big 5 label of the major American companies [Kindem 2000a: 321]. These five countries exhibit active production trends throughout the entire



observation period, although there are some differences from year to year and from country to country. For instance, the UK reached its production peak in 2011, while France peaked in 2021. Italy's production trend has been relatively stable, showing a slight increase over the years. Other countries tend to have lower production levels, with generally fewer than 100 titles produced throughout the observation period, with the exception of Russia and Turkey, which show an upward trend. Central-Eastern European productions, on the other hand, reveal a low figure, at least in the countries for which we could find systematic data: Bulgaria, Czech Republic, Hungary, North Macedonia, Poland, Romania, and Slovakia. It is not easy to frame this tendency, in any case, as movie production is not considered in comparative media studies since Hallin and Mancini's seminal work [2004], and the same can be told for the reflection on Eastern media industries [see Miconi & Papathanassopoulos 2023].

**Figure 2.** Movies screened by cluster of countries



[Source: Elaboration on European Audiovisual Observatory data]

In addition to movie production, it is important to also consider the number of titles available to the public. Countries that do not have high levels of movie production might still consume films produced elsewhere. To shed light on this aspect, Figure 2 analyzes the number of movie titles screened each year by cluster of countries. As expected, Spain and Germany, which are also active movie producers, have a relatively high volume of screened titles. The situation is more diverse for other countries: Eastern European countries such as Bulgaria and Hungary have a low number of screened titles, while Austria, Belgium, and Switzerland (in the Other Western European Countries group) have a high number of titles, despite not having high levels of movie production.

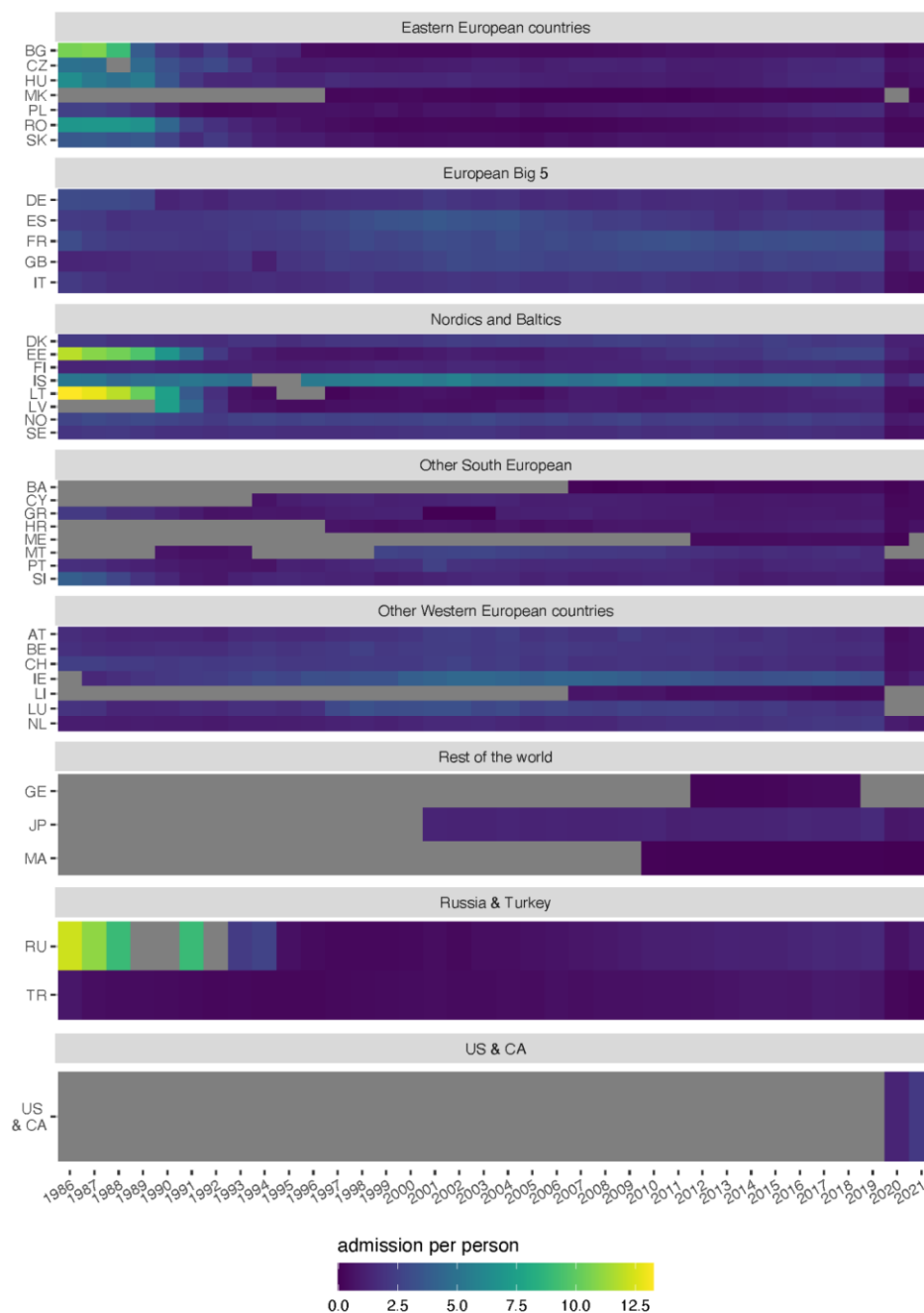
The data on produced and screened content gives insight into the availability of movies in each country, but does not fully capture how they are consumed.

To address this, we look at the number of admissions per person by country. This metric indicates the level of interest in cinema and how it changes over time. Figure 3 shows the admissions per person for each country. It is noticeable that for most countries the values are low for all the observation period, meaning that the majority of people do not frequently attend the cinema. This is particularly true for the “European big five” countries. However, there are exceptions such as Bulgaria, Latvia, and Russia that initially had higher admissions per person but have experienced a decline over time. This is possibly due to the increasing popularity of alternative sources such as streaming services and on-demand platforms, resulting in comparable admission values across all countries by 2021. The decrease of movie attendance is particularly sharp in the case of Bulgaria, starting between the late 1980s and the 1990s – and it is probably not a coincidence, that Bulgaria would also show a significant increase in daily TV watching time [see deliverable D1.2- *Patterns in Media Consumption: Regional Patterns*]. Even more impressive is the already cited data about Russia, probably due to the structural industrial collapse following the fall of the Soviet Union. In fact, in the very same years, according to the UNESCO statistics, the exportation of Russian movies in Eastern Europe dramatically dropped down: and at the same time, the American quota of imported films raised from 14% to 85% in Poland; from 10% to 87% in Romania; and from 16% to 71% in Hungary [Miconi 2005: 173-177].

Finally, we may notice that there are no visible consequences of the 2008 economic downturn, in terms of movie admissions. This might be surprising, when one considers that some historical circumstances are documented, upon which cinema attendance would decline in times of crisis: as it happened in Italy in the 1970s [Sorlin 2019], and more recently in a number of Central-European nations [Hanzik 2017]. In other cases, though, admissions even increased in an age of crisis, for instance in some segments of the market in both Germany and the United States between 1920s and 1930s [see, respectively, De Fleur & Ball Rokeach 1989: 80-82; and Ross 2008: 172-173]. In the case of post-2008 crisis, it is a fact that audiences – and the more so in the heavily affected countries – have gave up the consumption of expensive cultural commodities, while favoring those which are more affordable [see Bergés Saura & Papathanassopoulos 2015: 55-57]. The limited impact of this shift on cinema attendance – at least at the big picture level of European patterns - might therefore call for an explanation. A first hypothesis is that movie theaters, even in the era of multiplex, are still a relatively cheap

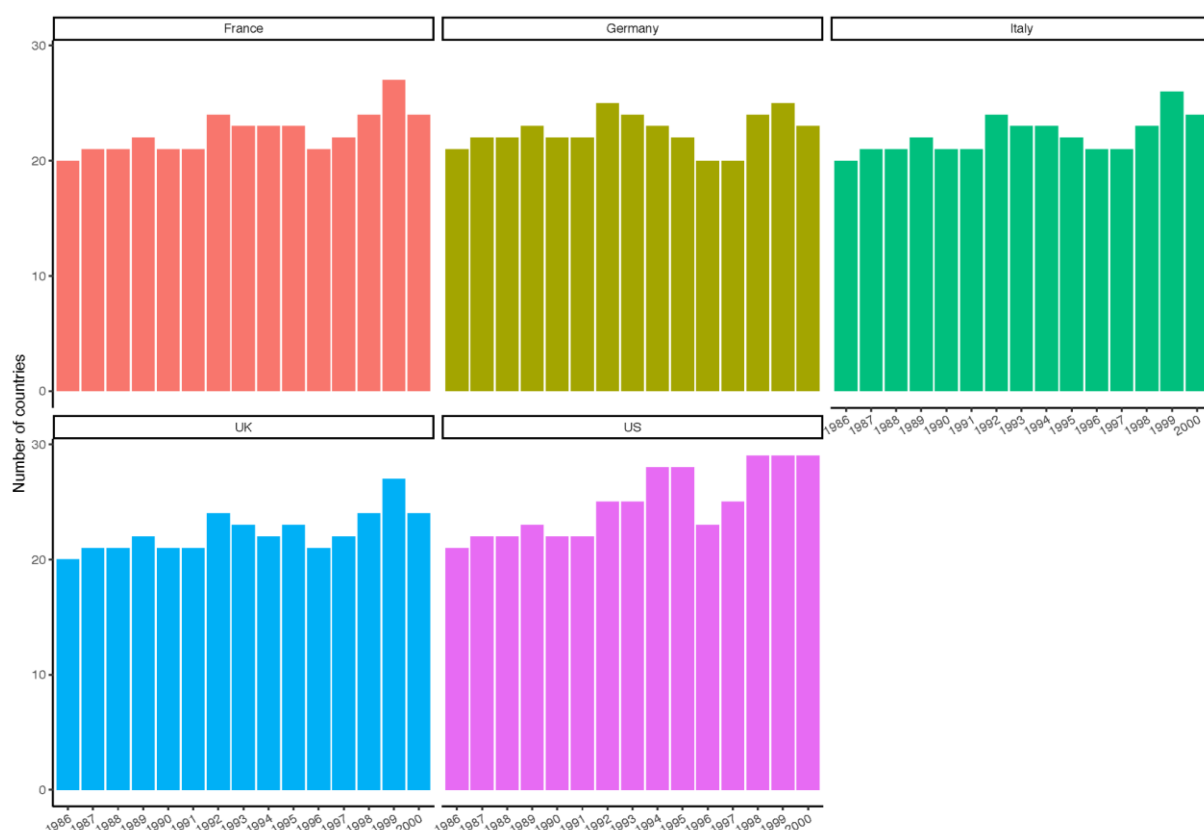
form of entertainment, when compared to, say, classical theaters or live concerts – so that the movies can somehow be perceived as a sort of *safe harbor*, when people are prevented from accessing other experiences. On the other hand, and in parallel, it may be suggested that cinema attendance had already reached its minimum peak – a point after which a further decrease would become socially possible but technically unlikely, as also suggested by Jan Hanzik in the above-cited work.

**Figure 3.** Cinema admissions by cluster of countries



[Source: Elaboration on European Audiovisual Observatory data]

**Figure 4.** Countries of availability



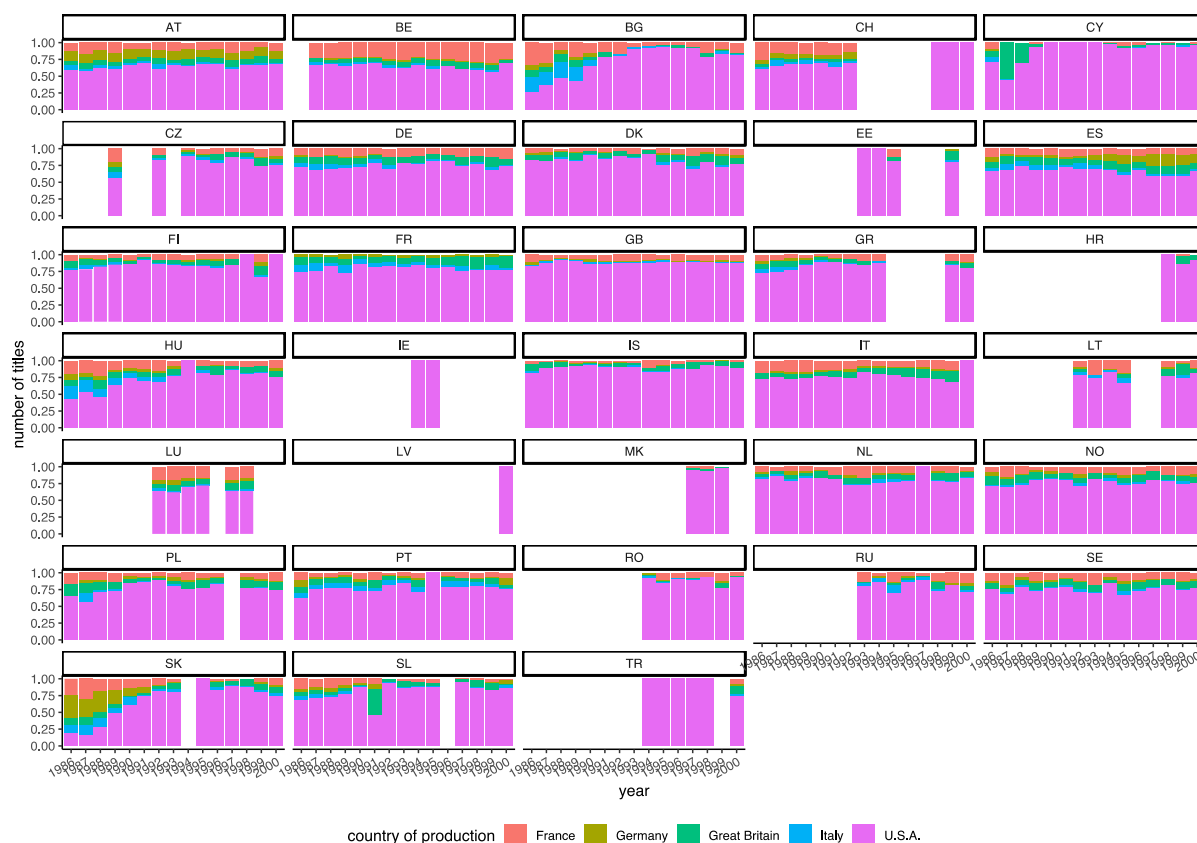
[Source: Elaboration on European Audiovisual Observatory data]

We now turn our attention to the distribution of works produced by five major nations, France, Germany, Italy, the United Kingdom, and the US, across European countries. Figure 4 displays the trend of the number of countries in which the movies produced by these five nations are distributed. The United States has the highest reach, being distributed in the highest number of countries. However, other countries are also able to reach a significant number of markets, with at least 20 countries being reached by each producer. We observe that the distribution of contents has tended to grow over time, with the highest values recorded during the years 1999-2000. As a matter of fact, the number of countries of availability – on average – has increased in all the five cases, though at a different degree. This might be a confirmation of the overall tendency of movie market – and media market at large – towards an increasing concentration of industrial practices, capitals, and market exploitation as well [see for instance, in the same perspective, Kindem 2000b: 367].

We complete this part of the analysis by examining the consumption patterns of content produced by a selected group of highly productive nations - France, Germany, Italy, the United Kingdom, and the US - in EU countries. Figure 5 displays the distribution works based on the country of origin. It can be observed that US content has the highest fraction in all countries throughout the entire observation period, with the exceptions of Slovakia, Hungary, and Bulgaria that consumed less US content at the beginning of the observation period, back in the

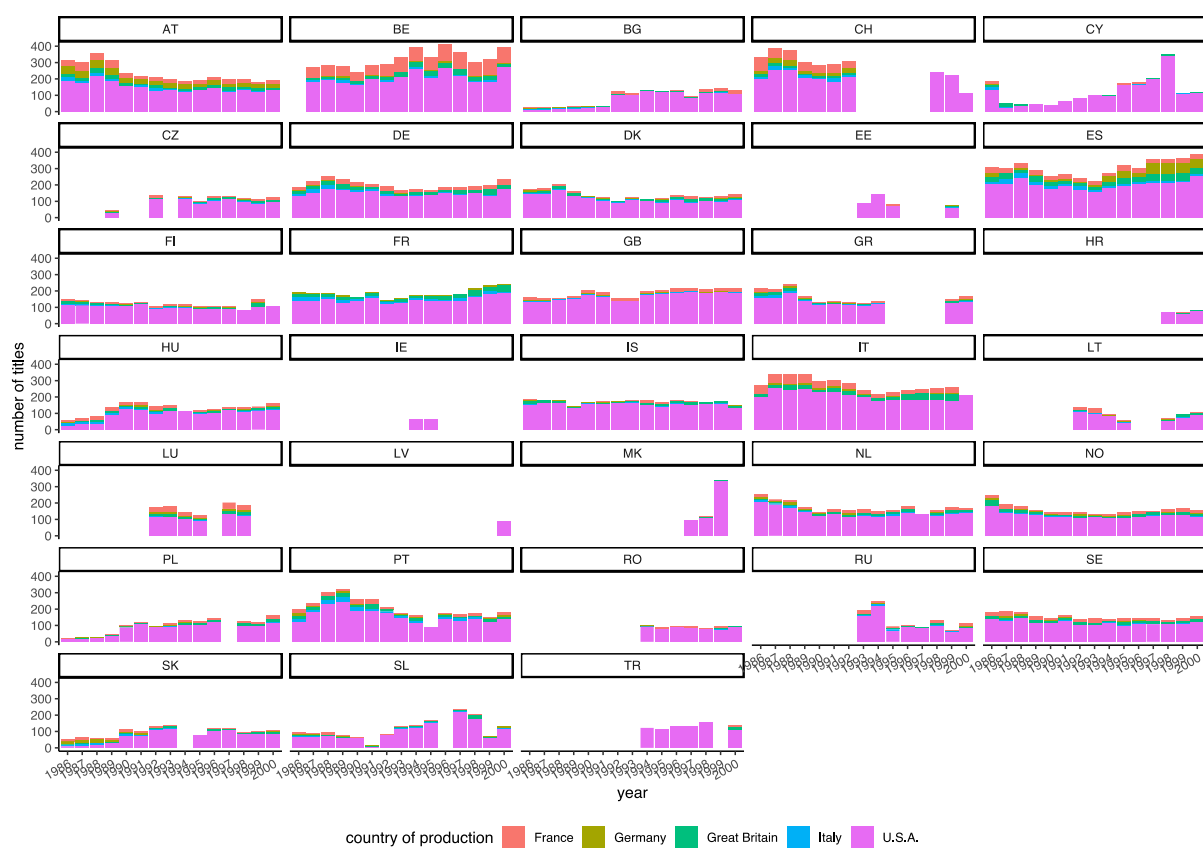
Soviet era. Additionally, some countries, such as Belgium, Austria, and Spain, have a higher presence of European contents, while others, such as Germany, Finland, and Romania, tend to have a lower presence. This can be explained by language similarities, such as the case of Belgium and France. Notice that for France, Germany, Italy, and the UK, the share of domestic production has been excluded from this analysis. In Figure 6, we show the same distribution of movies in absolute values.

**Figure 5.** Distribution of movies by country of origin



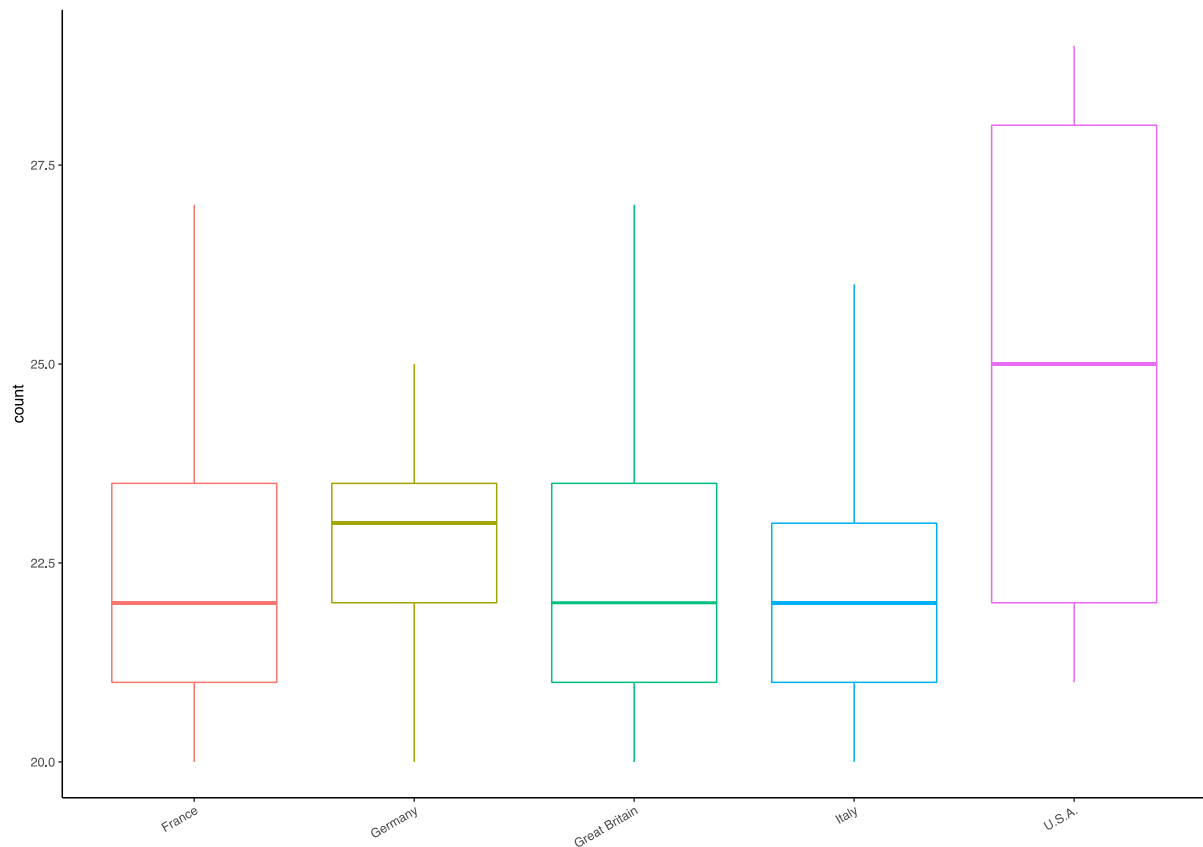
[Source: Elaboration on European Audiovisual Observatory data]

**Figure 6.** Distribution of movies by country of origin



[Source: Elaboration on European Audiovisual Observatory data]

**Figure 7.** Distribution of movies by country of origin



[Source: Elaboration on European Audiovisual Observatory data]

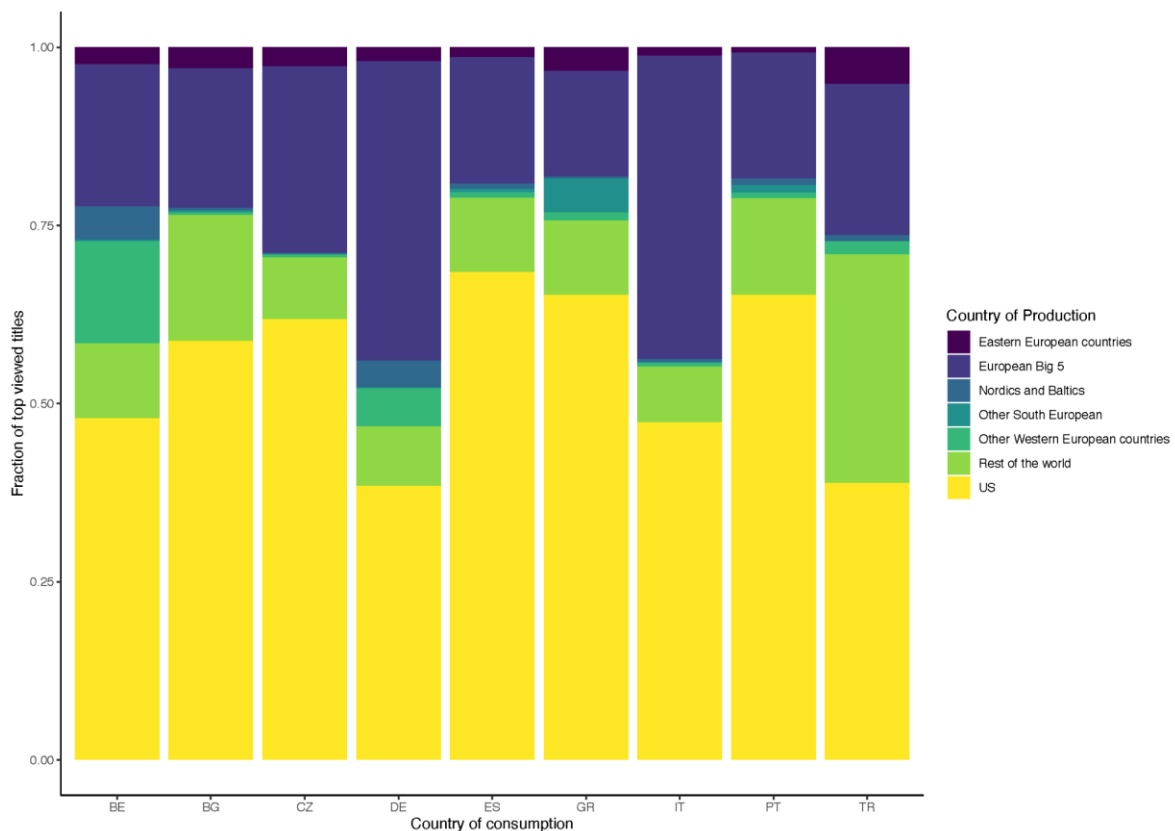
In Figure 7, we opted for a Boxplot visualization of movie distribution trends, based on the same set of data. All in all, the picture is quite familiar; even though some additional aspects would emerge. Firstly, the US hegemony over the market is made visible in full display, with the median level of countries of availability being higher than that of any other producer. Secondly, when it gets to the screening of European movies, German titles have the best geographical distribution. Needless to say, the median values tell very little about the majors' marketing strategies, which notoriously point to the occupation of the theaters by a handful of high-budget films, or saturation releasing [see Wagstaff 1999]. This being said, the wider availability of German works is quite surprising, when one recalls that German language is hardly spoken in Europe, and that in the case of VOD offer – due to the geo-blocking release – German movies are mostly distributed in Switzerland and Austria [see D3.4- *Catalogue of Best Practices and Main Obstacles to Europeanization*].

### 3 Video-on-Demand Platforms

The advent of technology and the widespread availability of the internet have changed the way we consume audiovisual content. One of the most notable changes has been the rise of video-on-demand (VOD) services, which allow consumers to access movies and TV shows at any time and place. This shift has had a profound impact on the production and distribution of audiovisual contents, challenging the traditional methods of film and TV production and distribution. With a growing number of consumers opting to stream movies and TV shows online, it is important to understand the impact that VOD services have in the circulation of audiovisual content.

To do this, we rely on the Lumière dataset available at <https://lumierevod.obs.coe.int/> and on data collected from the EUMEPLAT partners in Tasks 3.1 (lead by NBU), 3.2 (lead by NBU) and 3.3 (lead by IULM). This data enables us to analyze the production and distribution of audiovisual content in VOD platforms by country.

**Figure 8.** Distribution of European movies in VODs



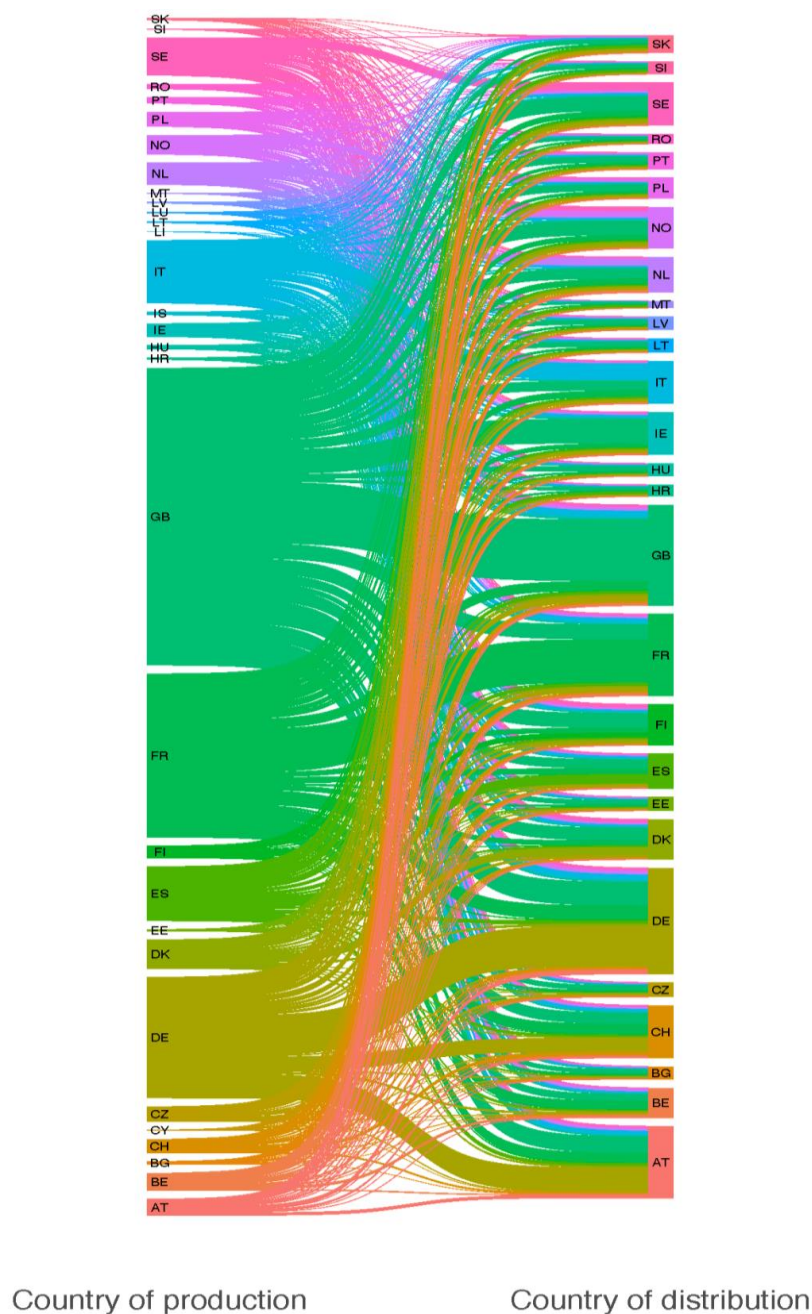
[Source: Elaboration on Lumière database data]



We start by analyzing the consumption patterns of the most viewed video on demand (VOD) content in the EUMEPLAT project countries. Figure 8 displays the distribution of the production countries of the most viewed content in none of the EUMEPLAT partner countries. With the exception of Germany, all other countries have a dominant fraction of consumed contents from the United States, followed by those produced by the "European Big 5" countries (France, Germany, Italy, Spain, and the UK). However, Turkey is an exception with a higher share of titles from other countries around the world (that includes domestic productions), compared to the "European Big 5". We may observe that in this case too, the German market will prove to be peculiar.

Next, we use the Lumière dataset to explore the circulation of audiovisual titles on video-on-demand platforms in European countries. In this case, we worked on the full dataset of 90,510 movies, produced in the following countries: Austria, Belgium, Bulgaria, Croatia, Czech Republic, Cyprus, Denmark, Estonia, France, Finland, Germany, Hungary, Iceland, Ireland, Italy, Latvia, Liechtenstein, Lithuania, Luxembourg, Malta, Netherlands, Norway, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, Switzerland, and the UK.

**Figure 9.** Distribution patterns of European movies in VODs

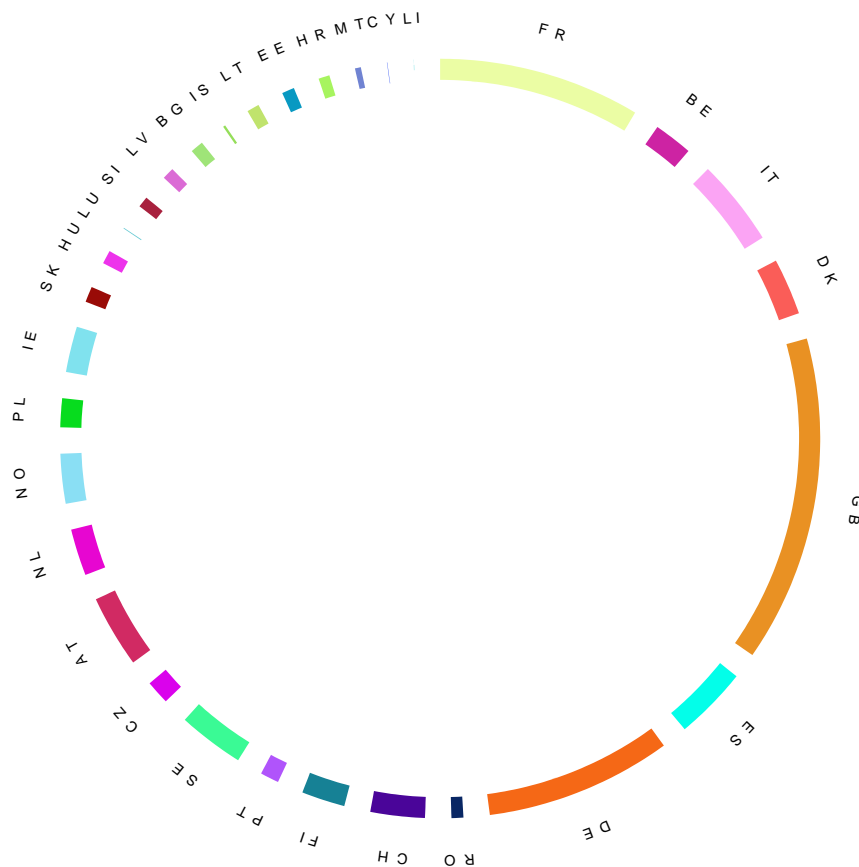


[Source: Elaboration on Lumière database data]

The Sankey diagram in Figure 9 displays the distribution patterns across European countries. The production of content (left side of the plot) is dominated by France, Germany, Italy, the UK, and Spain, while other countries play a lesser role. This is reflected in the importation trends (right side of the plot), where English and French contents are widely available among European countries, followed by the other major producers. Once again, there appears to be a correlation between language similarities and content availability, as seen in the high recurrence of German content in Austria or French content in Belgium. As already

observed in another deliverable, and more broadly speaking, the dominant role played by English and French works is relevant for two reasons. Firstly, the geo-cultural pattern largely overlaps with that defined by the circulation of English and French novels in the XIX century [see Moretti 1997: 151], in a way that reminds us of the *continuity* and repetitiveness of some historical trends, even in the age of digital platforms. Secondly, it comes as a consequence that Hollywood's undisputed power can hardly be held as the *only* obstacle to Europeanization, which is also put at risk by other hierarchies, which are rather intrinsic to European space itself [see D 3.4- *Catalogue of Best Practices and Main Obstacles to Europeanization*].

**Figure 10.** Distribution patterns of European movies in VODs



[Source: Elaboration on Lumière database data]

Figure 10 offers an alternative display of the same dataset of 90,510 titles, perhaps making it more evident the limited impact – in quantitative terms – of the exportations coming from the vast majority of European countries. While reflecting on the weakness of Europe in terms of soft power, and on audiovisual in particular, Thomas Elsaesser observed:

However, it is the asymmetries and internal contradictions that might explain why export successes in machine tools, motor cars, design, fashion and software have not matched in the sphere of culture. There, Europe presents itself in many fields with much diminished cultural power and prestige, nowhere more clearly than in the loss of status suffered by its respective media entertainment productions. With a very few exceptions, the nations of Europe do not have global media companies producing television programs that the world wants to see, yet – on a smaller scale – the decline is also evident in the area of art-and-auteur cinema, where France, Italy, Sweden, Germany and Poland with their respective "new waves" were once leading by example and excellence, certainly from the 1940s to the mid-1970s [2019: 84].

We will not indulge here in discussing the role of auteur-cinema as an allegedly typical European form – as it is out of the scope of a quantitative analysis – while sticking to the big picture. It is the fragmentation of industrial systems, Elsaesser states, that makes Europe weak: something that Figure 10 – with exportation flows from minor countries progressively vanishing and becoming invisible – would plastically represent.

## 4 Video Sharing Platforms

The rise of social media platforms such as YouTube, Instagram and TikTok has had a profound impact on the distribution and consumption of audiovisual contents. These platforms have created new opportunities for content creators to reach a large, global audience and have made it easier than ever before to spread information, entertainment, and culture. In addition to providing a new outlet for content creators, social media platforms have also changed the way consumers interact with audiovisual content, allowing them to share and recommend content to their friends and followers, and giving them the ability to engage with content creators and influencers directly. This has created a new, more participatory and dynamic landscape for the creation and distribution of audiovisual content. In WP3 we focused on these three platforms – rather on Twitter and Facebook, as we have done in WP2 – exactly for their specific, by-default affordance for visual communication.

In order to sketch a little context, we will recall here some data about the general state of national social media market [with the considered countries marked in bold, in all the following tables].

**Table 1.** General data on web and social media, 2021

Country	Internet Users	Social Media users	Mobile % on social media users	Facebook Users	YouTube users	Instagram Users	Twitter users	Snapchat users
AT	89%	79,9%	96,4%	45,6%	84,9%	38%	6,4%	22,2%
BE	91%	76%	96,1%	69,7%	81,6%	45,4%	10,3%	32,8%
<b>BU</b>	<b>71%</b>	<b>62,1%</b>	<b>96,9%</b>	<b>62,8%</b>	<b>62,9%</b>	<b>26,4%</b>	<b>3,3%</b>	<b>11,6%</b>
CY	86,1%	82,5%	98,3%	82,8%	NA	64,5%	9,6%	NA
<b>CZ</b>	<b>88%</b>	<b>69%</b>	<b>94,6%</b>	<b>56,2%</b>	<b>73,7%</b>	<b>32,4%</b>	<b>6,1%</b>	<b>10,2%</b>
<b>DE</b>	<b>94%</b>	<b>78,7%</b>	<b>96%</b>	<b>39,4%</b>	<b>82,5%</b>	<b>35,3%</b>	<b>7,9%</b>	<b>20,8%</b>
DK	98,1%	83,6%	96,8%	78,1%	90,2%	50%	10%	51%
EE	91%	74,4%	94,4%	61,6%	79,7%	38,7%	6,9%	NA
<b>ES</b>	<b>91%</b>	<b>80%</b>	<b>97,7%</b>	<b>53,6%</b>	<b>84,8%</b>	<b>51,1%</b>	<b>18,3%</b>	<b>10%</b>
FI	95%	80,4%	95,8%	58,4%	85,7%	48%	11,7%	29,2%
FR	91%	75,9%	96,1%	59,5%	84%	43,3%	14,4%	44,2%
<b>GR</b>	<b>83%</b>	<b>73,5%</b>	<b>94,7%</b>	<b>71%</b>	<b>78%</b>	<b>29,6%</b>	<b>3,3%</b>	<b>16%</b>
HR	80%	68,4%	97,4%	50,2%	70,5%	36,3%	3,6%	14,6%
IE	91%	76,4%	98,2%	66,2%	85,1%	54%	26,9%	47,8%
<b>IT</b>	<b>83,7%</b>	<b>67,9%</b>	<b>98,2%</b>	<b>57,6%</b>	<b>66,9%</b>	<b>46,5%</b>	<b>5,2%</b>	<b>6,5%</b>
LT	82,2%	75,4%	96,6%	72,9%	78,3%	33%	4,9%	17,7%

LV	88,9%	73,5%	95,1%	57,9%	78,3%	38%	6,4%	NA
NL	96%	88%	96,6%	61,3%	92,5%	51,2%	21,2%	39%
PL	84,5%	68,5%	96,6%	54,8%	72,9%	28%	4,1%	14,9%
<b>PT</b>	<b>84,2%</b>	<b>76,6%</b>	<b>96,9%</b>	<b>69,9%</b>	<b>71,2%</b>	<b>53%</b>	<b>12,1%</b>	<b>12,1%</b>
RO	80,7%	62,6%	98,1%	66,1%	64,3%	30%	4%	14,1%
SI	84%	69,8%	96%	55,4%	74,2%	34,3%	5,5%	22%
<b>SE</b>	<b>98%</b>	<b>82,1%</b>	<b>97,5%</b>	<b>73,5%</b>	<b>90,1%</b>	<b>66,5%</b>	<b>13,4%</b>	<b>47,8%</b>
SK	85%	73,8%	95,9%	57,2%	78,4%	29,6%	3%	9,8%
<b>TR</b>	<b>77,7%</b>	<b>70,8%</b>	<b>98,5%</b>	<b>56,5%</b>	<b>64,9%</b>	<b>68,4%</b>	<b>20,2%</b>	<b>16,5%</b>
UK	96%	77,9%	97,5%	66%	84%	53,8%	28,6%	36,6%

[Source: Elaboration on We Are Social, Data Reportal, and ITU data]

As one can see in Table 1, some differences are in place. With respect to the European standards, Bulgaria and Turkey show a low rate of Internet users; Greece, Italy and Portugal a medium diffusion; and Czechia, Germany, Spain and Sweden a high diffusion (with Spain not respecting the conventional regionalization, based on the media systems model). Differences in the use of YouTube are relatively modest – ranging from 62.9% in Bulgaria to 90.1% in Sweden – and the same can be told about Facebook (from 53,6% in Spain to 73.5% in Sweden). The gap is wider in the case of Instagram, with a minimum of 26.4% in Bulgaria and a maximum of 68.4% in Turkey.

More impressively, the percentage of mobile users on social media users is basically the same in all countries – somewhere in the interval between 94.7% and 98.5% of the total. This possibly comes as a proof of the twofold nature of globalization, which does not impact all regions at the same rate, nor it makes those countries more similar to each other. In a more subtle way, such process would affect variable shares of the population in any country – leading *these specific cohorts* towards a more homogeneous behavior. Global connection can only come at the price of *local disconnection*, Manuel Castells [1996] explains in his classical theory of the network society, and this would also happen at the micro-level of individual access to the web.

**Table 2.** TikTok Reach in Europe, 2022, Third Quarter

Country	Total Reach [18+ citizens]	Web Users Reach [18+ citizens]
Austria	22.1%	23.8%
<b>Belgium</b>	<b>27.1%</b>	<b>28.8%</b>
<b>Czechia</b>	<b>16.2%</b>	<b>18%</b>
Denmark	21.8%	22%
Finland	24.9%	25.6%
France	30.5%	32.8%
<b>Germany</b>	<b>23.1%</b>	<b>24.8%</b>
<b>Greece</b>	<b>29.4%</b>	<b>35.7%</b>
Hungary	24.4%	27.7%

Ireland	40.6%	41%
<b>Italy</b>	<b>27.6%</b>	<b>32%</b>
Netherlands	31.9%	33.2%
Norway	28.9%	29.2%
Poland	22.9%	26.4%
<b>Portugal</b>	<b>30.1%</b>	<b>35.6%</b>
Romania	34.7%	39.4%
Russia	38.9%	43.7%
<b>Spain</b>	<b>33%</b>	<b>35.1%</b>
<b>Sweden</b>	<b>30.4%</b>	<b>31.3%</b>
Switzerland	22.3%	22.7%
<b>Turkey</b>	<b>36.1%</b>	<b>44%</b>
Ukraine	26.8%	33.6%
UK	35.3%	36%

[Source: DataReportal and WeAreSocial]

In the case of TikTok, research reports usually do not include systematic statistics, and therefore we had to rely on commercial data on the advertising reaching – which, nonetheless, are expected to be quite reliable, exactly due to their economic relevance. As one can see [Table 2, data for Bulgaria not available], the numbers vary within a small range, with the exception of Turkey: also due to the fact that in no case TikTok ranks as the most diffused social media platform. In term of daily use, UK, Germany and France are the only European countries above the global average of 19.6 monthly hours, with respectively 27.3, 23.6 and 21.1 hours per person per month, with Turkey slightly under the average, with 18.8 hours [We Are Social 2022].

The following information – in Tables 3, 4, and 5 – can be useful to contextualize the data concerning video-sharing in the ten countries, as they include the percentage of users inclined to consume videos in digital platforms.

**Table 3.** The Web for cultural consumption by age, 2018, percentage of users in the last three months

Country/ Age Class	Online news and newspapers			Tv, video and streaming		
	16-74	16-24	55-74	16-74	16-24	55-74
AT	71	78	60	76	97	55
<b>BU</b>	<b>74</b>	<b>59</b>	<b>78</b>	<b>47</b>	<b>63</b>	<b>29</b>
CH	79	79	71	NA	NA	NA
CY	80	69	85	83	96	64
<b>CZ</b>	<b>91</b>	<b>88</b>	<b>91</b>	<b>61</b>	<b>87</b>	<b>35</b>
<b>DE</b>	<b>74</b>	<b>67</b>	<b>68</b>	<b>74</b>	<b>93</b>	<b>52</b>
DK	86	89	79	87	99	70
EE	90	92	87	74	94	54
<b>ES</b>	<b>77</b>	<b>78</b>	<b>71</b>	<b>82</b>	<b>95</b>	<b>66</b>
FI	90	89	84	90	99	78
FR	61	66	56	63	92	41
<b>GR</b>	<b>87</b>	<b>79</b>	<b>90</b>	<b>62</b>	<b>94</b>	<b>35</b>
HR	91	86	92	85	96	66
HU	85	81	88	64	83	42
IE	65	68	59	74	95	45
IS	95	89	93	91	98	79

<b>IT</b>	<b>56</b>	<b>50</b>	<b>58</b>	<b>72</b>	<b>89</b>	<b>54</b>
LT	93	89	93	80	92	63
LU	88	82	85	53	70	34
LV	84	78	85	70	90	47
MT	83	86	78	76	91	62
NO	93	93	90	89	100	70
PL	79	75	78	64	85	41
<b>PT</b>	<b>80</b>	<b>83</b>	<b>72</b>	<b>62</b>	<b>87</b>	<b>38</b>
RO	69	59	70	26	36	15
<b>SE</b>	<b>88</b>	<b>82</b>	<b>83</b>	<b>88</b>	<b>98</b>	<b>78</b>
SK	77	71	79	45	63	26
SL	77	80	74	78	95	57
<b>TR</b>	<b>56</b>	<b>50</b>	<b>58</b>	<b>72</b>	<b>89</b>	<b>54</b>
UK	68	65	65	81	92	54
EU_28	72	70	67	72	90	54

[Source: EUROSTAT Culture Statistics 2019; data for Belgium not available]

**Table 4.** The Web for cultural activities by socio-economic class in Europe, 2018, % of users in the last three months

		Online news and newspapers	Web Tv and videos	Web radio and music	Gaming
Avg_		72	72	56	33
Age	16-24	70	90	86	58
	25-74	75	75	59	33
	55-74	67	54	30	20
Gender	M	75	75	59	37
	F	70	69	53	30
Education	Lower secondary	56	66	52	39
	Upper secondary	71	69	53	34
	Tertiary	85	81	63	29
Household income	Quartile 1	68	66	51	34
	Quartile 2	71	66	51	33
	Quartile 3	74	73	59	35
	Quartile 4	81	73	59	35
Urbanization	Rural	70	66	53	30
	Town	71	72	55	34
	City	76	75	59	35
Occupation	Employed	75	74	59	32
	Unemployed	66	72	55	37
	Students	74	90	87	59
	Inactive	65	56	35	25

[Source: EUROSTAT Culture Statistics]



**Table 5.** The Web for cultural consumption by gender, 2018, percentage of 16-74 aged users in the last three months

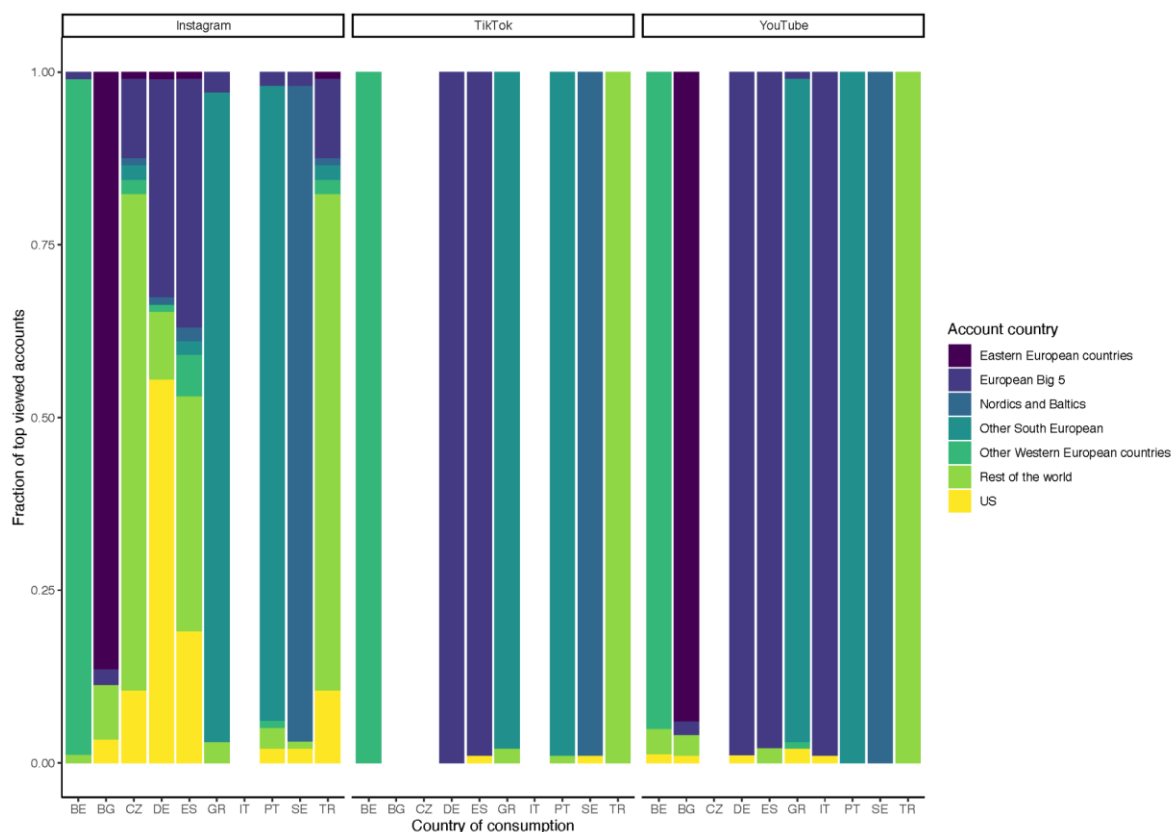
Country/Gender	Online news and newspapers		TV and video streaming		Music and web radio		Gaming	
	M	F	M	F	M	F	M	F
AT	76	66	80	71	55	46	25	17
<b>BE</b>	<b>65</b>	<b>62</b>	<b>64</b>	<b>56</b>	<b>46</b>	<b>40</b>	<b>47</b>	<b>40</b>
<b>BU</b>	<b>74</b>	<b>74</b>	<b>51</b>	<b>42</b>	<b>53</b>	<b>44</b>	<b>28</b>	<b>16</b>
CH	84	74	NA	NA	NA	NA	NA	NA
CY	82	78	84	82	55	50	40	30
<b>CZ</b>	<b>92</b>	<b>90</b>	<b>63</b>	<b>59</b>	<b>54</b>	<b>49</b>	<b>37</b>	<b>21</b>
<b>DE</b>	<b>77</b>	<b>70</b>	<b>78</b>	<b>69</b>	<b>53</b>	<b>42</b>	<b>41</b>	<b>34</b>
DK	88	84	88	85	73	65	44	42
EE	91	88	80	68	67	62	31	23
<b>ES</b>	<b>80</b>	<b>75</b>	<b>83</b>	<b>81</b>	<b>60</b>	<b>56</b>	<b>36</b>	<b>31</b>
FI	90	90	91	89	77	74	45	34
FR	63	59	66	60	52	47	34	33
<b>GR</b>	<b>89</b>	<b>85</b>	<b>64</b>	<b>61</b>	<b>72</b>	<b>71</b>	<b>34</b>	<b>29</b>
HR	92	90	88	82	52	46	33	23
HU	85	86	69	58	72	67	44	35
IE	68	63	78	71	67	63	34	29
IS	96	94	92	89	82	81	34	22
<b>IT</b>	<b>58</b>	<b>53</b>	<b>74</b>	<b>70</b>	<b>56</b>	<b>52</b>	<b>30</b>	<b>24</b>
LT	93	93	82	77	60	55	34	23
LU	89	86	58	47	59	52	34	29
LV	85	83	74	66	51	44	32	21
MT	82	84	79	72	72	66	39	37
NL	83	76	92	88	57	49	48	46
NO	94	91	91	87	74	70	36	27
PL	80	79	67	61	58	53	29	17
<b>PT</b>	<b>82</b>	<b>79</b>	<b>68</b>	<b>57</b>	<b>70</b>	<b>68</b>	<b>43</b>	<b>36</b>
RO	73	66	29	22	54	47	38	28
<b>SE</b>	<b>92</b>	<b>84</b>	<b>91</b>	<b>87</b>	<b>81</b>	<b>74</b>	<b>32</b>	<b>35</b>
SK	78	76	48	42	58	50	29	24
SL	79	74	79	76	64	63	28	23
<b>TR</b>	<b>73</b>	<b>61</b>	<b>83</b>	<b>78</b>	<b>62</b>	<b>60</b>	<b>40</b>	<b>29</b>
UK	75	69	87	82	70	63	41	30
EU_28	75	70	75	69	59	53	37	30

[Source: EUROSTAT Culture Statistics 2019]

A few basic assumptions can be derived from the above data. Firstly, the different rates of on-line video consumers plainly reflect the overall divide in the diffusion of digital services [Table 3], thus suggesting again the hypothesis – as previously stated – that the main effect of technological convergence is not impacting *all sectors* of the population, while affecting *in the same way those who are actually impacted*. Secondly, in each of the ten considered countries (and in all countries in the European region, at that) the access to on-line videos is more diffused among men than it is among women, with this inevitably outbalancing the data related to overall people's preferences. Speaking of statistical biases, the social conditions of the users have finally to be considered. Unfortunately, granular data on national audiences – including

breakdown by income class, occupation and education status – are not publicly available, and therefore we must limit our observation to the general statistics. At the European level, consumers of "Web and Tv videos" are more diffused among well-educated people, living in big cities and with a medium-high income [Table 4]. Despite the mass dimension of video sharing, and the alleged universality of visual culture, the consumption of video services follows - and surprisingly so - a pattern more similar to that of online news, than that of such other mass-culture contents as music and games.

**Figure 11.** Most popular social media accounts by nationality of origin



[Source: Elaboration on Lumière database data]

With this in mind, the last part of this report is dedicated to understand the consumption of audiovisual content on YouTube, TikTok and Instagram. The graph in Figure 11 displays the distribution of the most popular accounts' origin for countries in the EUMEPLAT project. The results show that while some countries tend to have a more diverse consumption of contents, others have a more uniform distribution. There are also differences between platforms, with TikTok and YouTube having a less diverse distribution compared to Instagram.

A more granular breakdown would clarify the pattern of video-sharing consumption, at least at the level of most-followed channels. As one can see, in all the countries TikTok and YouTube are a totally national affair; with Instagram making some space for non-national profiles [see also D3.4- *Catalogue of Best Practices and Main Obstacles to Europeanization*].

**Table 6.** Top channels by nationality on YouTube, TikTok and Instagram

Country	Platform	National	Non-national EU_27	USA	Other	Total	National (%)
Belgium	TikTok	97	0	0	0	97	100
Belgium	Instagram	87	1	0	1	89	97.7
Belgium	YouTube	76	0	1	3	80	95
Bulgaria	TikTok	94	0	0	0	94	100
Bulgaria	Instagram	75	4	3	7	89	84
Bulgaria	YouTube	89	2	1	4	96	92.7
Czech Republic	TikTok	100	0	0	0	100	100
Czech Republic	Instagram	66	16	0	17	99	66.6
Czech Republic	YouTube	100	0	0	0	100	100
Germany	TikTok	100	0	0	0	100	100
Germany	Instagram	19	2	51	20	92	20.6
Germany	YouTube	94	0	1	0	95	98.9
Greece	TikTok	98	0	0	0	100	98
Greece*	Instagram	95	2	0	4	100	95
Greece	YouTube	95	3	2	0	100	95
Italy	TikTok	349	0	0	0	349	100
Italy	Instagram	224	65	78	78	445	50.3
Italy	YouTube	99	0	1	0	100	99
Portugal	TikTok	98	0	0	1	99	98.9
Portugal	Instagram	91	2	2	4	99	91.9
Portugal	YouTube	91	0	0	0	91	100
Spain	TikTok	98	0	1	1	100	98
Spain	Instagram	27	16	16	40	99	27.2
Spain	YouTube	87	0	0	3	90	96.6
Sweden	TikTok	96	0	1	3	100	96
Sweden	Instagram	94	0	2	4	100	94
Sweden	YouTube	100	0	0	0	100	100
Turkey	TikTok	66	0	0	0	66	100
Turkey	Instagram	58	13	10	15	96	60

Turkey	YouTube	85	0	0	1	86	98.8
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(\*) Data includes an account presented as Greek-Cypriot.

[Source: Elaboration on HypeAuditor data]

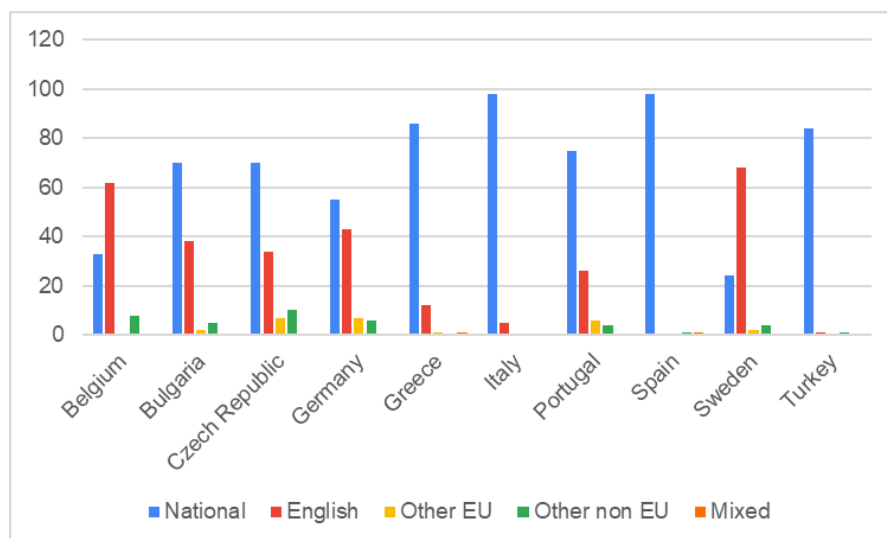
Overall, 88.4% of the most popular channels are national; ranging from 62.7% in the case of Instagram to 97.6% for YouTube, and 99% for TikTok (where the influencers may not present themselves as national: as in the case of Khaby Lame, the Italian top TikToker). As to the circulation of contents among European countries, once again we see that platformization is hardly bringing positive effects in terms of Europeanization. In the majority of cases – and excluding here the only non-EU country, Turkey – there are no non-national European channels in the list of the most popular: in the Bulgarian and Greek TikTok data; in both TikTok and YouTube data in Belgium (with only one on Instagram), Czech Republic, Italy, Spain, Portugal and Germany; and in none of the three platforms in Sweden.

What is more, exceptions are not difficult to explain. Out of the sixteen EU channels in Czechia, from instance, fifteen are from Slovakia – something which suggests the existence of a regional or sub-regional pattern, more than a European one. The other two outliers – 16 EU Instagram channels in Spain (out of 100), and 65 in Italy (out of 450) – possibly have something relevant to tell. In the case of Spain, these accounts are all about football, starting with the most followed, Cristiano Ronaldo, either they focus on teams or individual players: Paris Saint Germain, British Premier League, Zlatan Ibrahimović, Juventus, Gareth Bale, Tony Kroos, Manchester City, Eden Hazard, Luka Modric, Raphael Varane, Ivan Rakitić, Robert Lewandowski, Philippe Coutinho, and Borussia Dortmund; to which we have to add the unspecified “Home of Football” channel, from Netherlands; and, outside the European Union, three Swiss accounts, Adidas Football, FIFA World Cup, and UEFA Champions League – with the latter being, in the end, the only proper pan-European phenomenon in the whole series. It remains true that a majority of those football stars played or used to play in the Spanish major league; but the impression is that the role of popular sports in fostering a European common identity has been gravely overlooked in scientific research. Sport, and football in particular, is also relevant in the Italian Instagram-sphere, where we can find Kylian Mbappé, Zlatan Ibrahimović, Alvaro Morata, Mario Mandžukić, Wojciech Szczęśny, Dries Mertens, Gerard Deulofeu, Radja Nainggolan, Ivan Perišić, Theo Hernandez, Adrien Rabiot, Sebastian Vettel, João Cancelo, Borussia Dortmund, Christian Eriksen, Patrice Evra, Matthijs de Ligt, Blaise Matuidi, Romelo Lukaku, Sami Khedira, Charles Leclerc, Franck Ribéry; and, from non-EU European countries, Edin Džeko, Dusan Vlahovic, Hakan Çalhanoğlu, Granit Xhaka, Erling Haaland, Novak Djokovic, Lando Norris, Aaron Ramsey, Miralem Pjanić, and a more generic “England Football”. In sum, more than half of the European contents are related to major sports, with no other thematic category significantly represented – besides rare concessions to Eastern European supermodels – in a ranking which is rather altered by the presence of many corporate accounts, especially French luxury brands.

There is little doubt that the linguistic fragmentation of the continent plays a main part in the distribution of contents, here and elsewhere. In the three following graphs [Figures 12, 13 and 14] we analyzed the languages spoken by the users following the top channels in

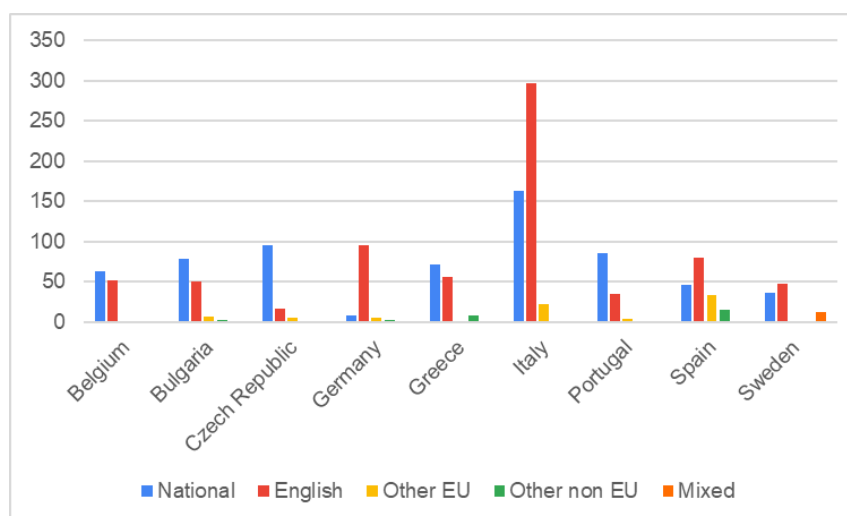
YouTube, Instagram and TikTok, in the ten countries, based on the demographic reports produced by Hype Auditor<sup>1</sup>.

**Figure 12.** YouTube users' languages



[Source: Ioanna Archontaki's elaboration on Hype Auditor data]

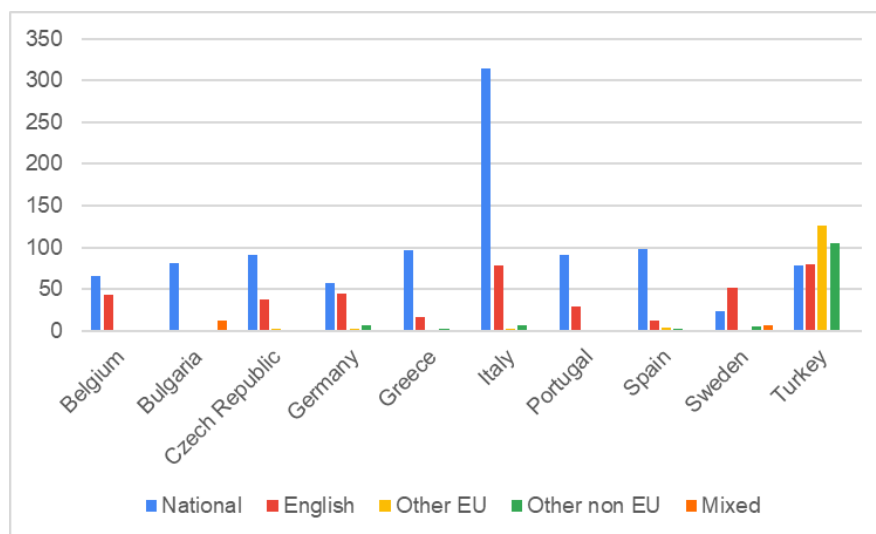
**Figure 13.** TikTok users' languages



[Source: Ioanna Archontaki's elaboration on Hype Auditor data]

<sup>1</sup> To be precise, the EUMEPLAT Consortium had to purchase these reports, as it was foreseen in the original Description of the Action, as marketing data are sadly not publicly available. Here and in the other WP3 reports, we show the aggregate data, while the possibility of sharing the whole datasets with the scientific community – in the name of the Open Access project we adhere to – is still under scrutiny.

**Figure 14.** Instagram users' languages

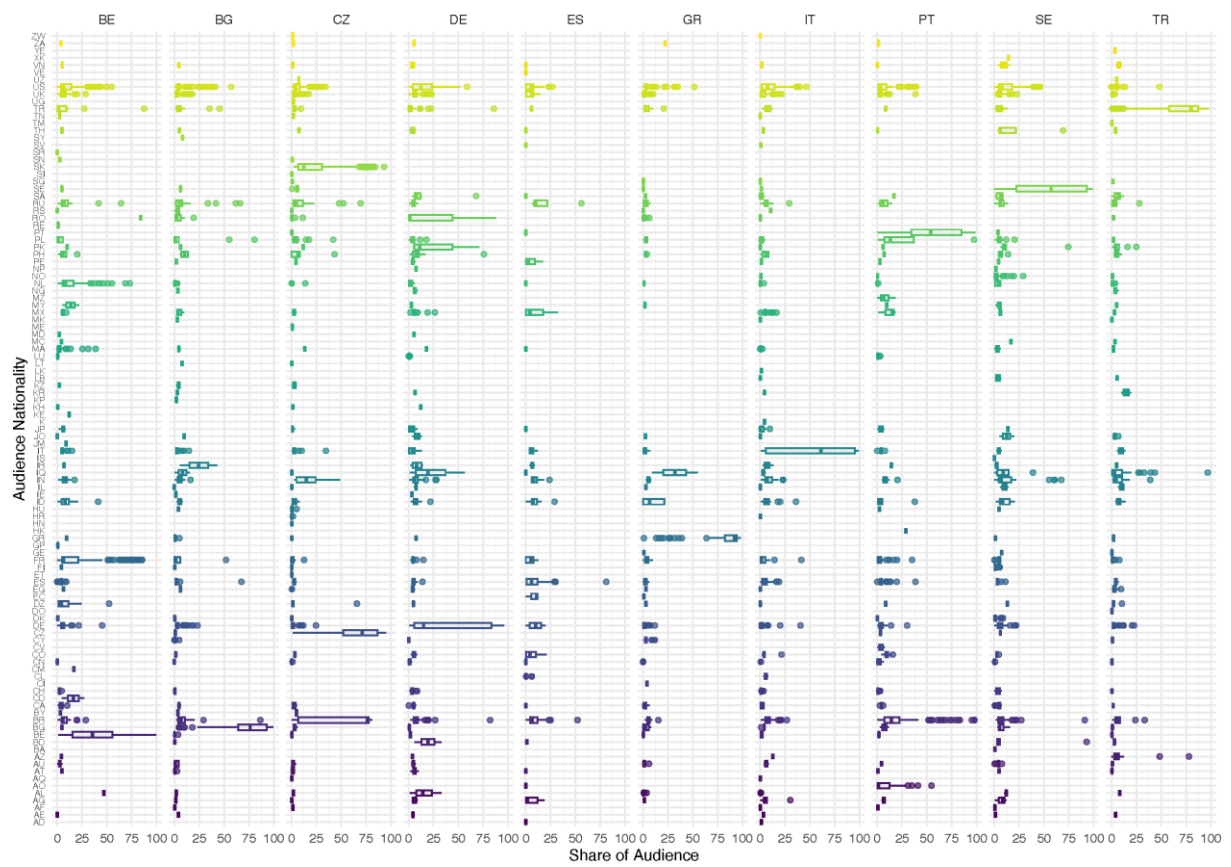


[Source: Ioanna Archontaki's elaboration on Hype Auditor data]

By and large, the relevance of national languages can hardly be exaggerated; this being said, nonetheless, a closer observation unravels more subtle tendencies (or micro-tendencies, perhaps). In Belgium, for instance, the use of French also results in the dependence of local market on the importation of French movies, which is a well-known story [see deliverables D1.3- *Patterns in Movie Production, Distribution and Consumption*; D3.1- *Patterns in Video Production in Ten Countries*; D3.2- *Patterns in Video Consumption in Ten Countries*; and D3.4- *Catalogue of Best Practices and Main Obstacles to Europeanization*]. In the case of video-sharing platforms, on the very contrary, 260 top influencers - out of a total of 266 – are Belgian, and there is space only for one single French account, that of the fashion influencer known as Lima Ché (which, by the way, is a *Belgian* woman based in both Paris and Antwerp). We have no explanation for this difference – between the importation of French movies in Belgium, and its impermeability to French influencers – which nonetheless confirms how closer analyses may unravel more nuanced and intricate patterns, when compared to the all-embracing explanations we are accustomed to. The case of Sweden is telling too, as English is largely spoken in the country; and, as the three figures would confirm, commonly used by video sharing consumers as well. For some reason, though, 290 out of the top-300 channels are home to national influencers: and the use of a foreign language, apparently, does not favor international exchanges while being incorporated into local daily practices.

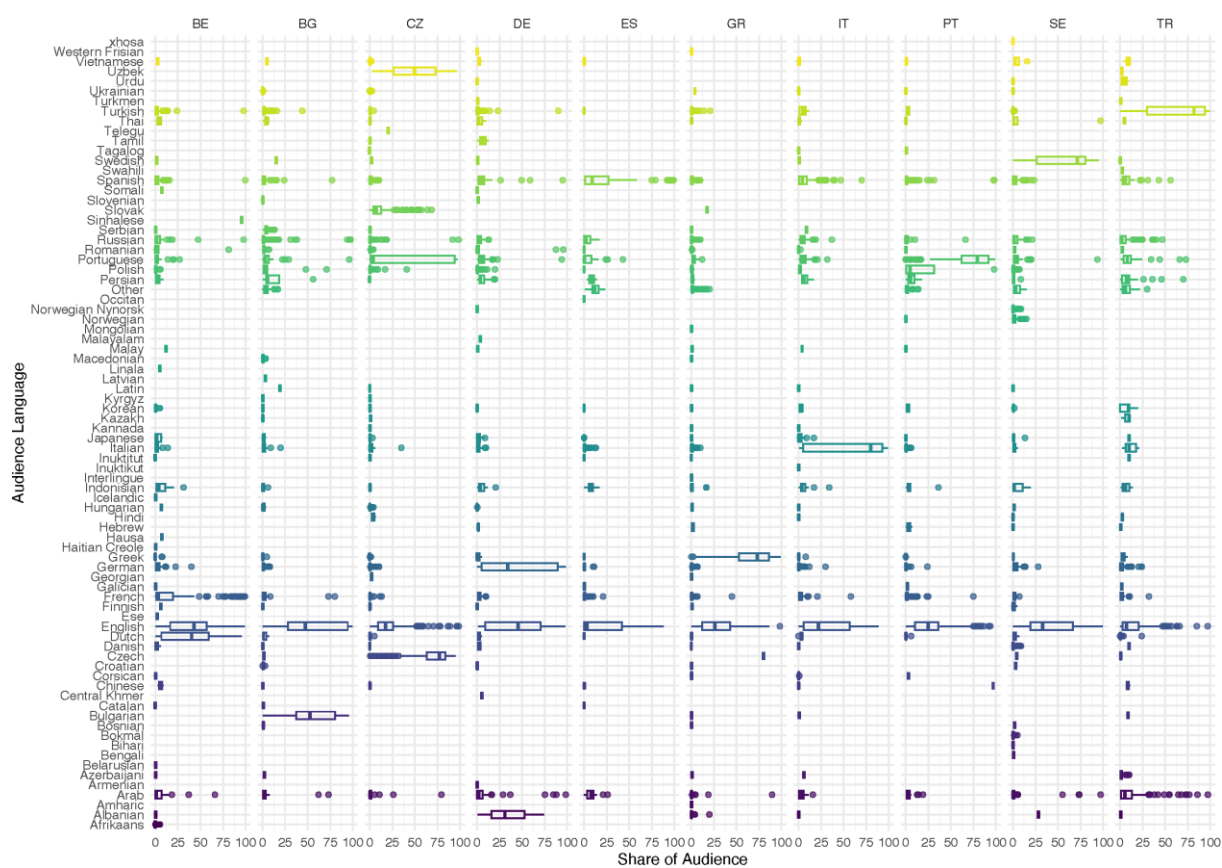
For coming to terms with this issue, we tried a more complex and experimental exercise, by plotting the distribution of audiences' nationality and languages – in percentage value - for all the channels included in the top-watched statistics of the ten countries [respectively, Figure 15 and 16]. In this case we will make the reverse elaboration, by isolating the nationality of social media accounts and looking for the characteristics of their audiences. Figure 17 shows the distribution of followers of the 2,822 considered social media channels, which is also synthesized in Table 7 (with very high variance, as was expected).

**Figure 15.** Distribution of most followed social media pages' audiences by nationality



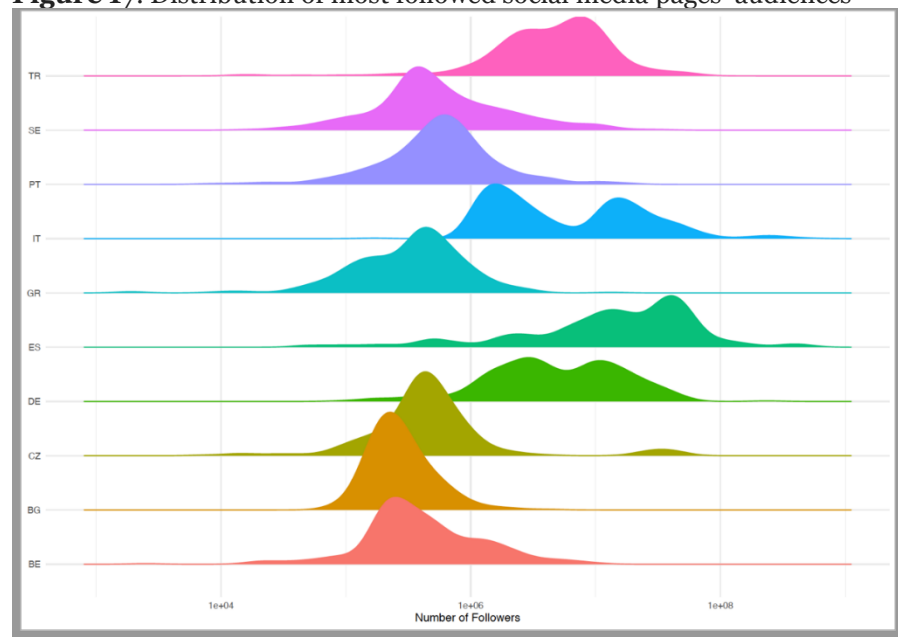
[Source: Elaboration on Hype Auditor data]

**Figure 16.** Distribution of most followed social media pages' audiences by language



[Source: Elaboration on Hype Auditor data]

**Figure 17.** Distribution of most followed social media pages' audiences



[Source: Elaboration on Hype Auditor data]



[Source: Elaboration on Hype Auditor data]

**Table 7.** Distribution of followers of the 2,822 analyzed social media channels

Country	Number of channels	Mean	Standard deviation
Belgium	300	763762.3	1218734.0
Bulgaria	294	341697.1	355353.3
Czech Republic	299	2085975.9	7367511.5
Germany	312	9529092.4	16474821.3
Greece	289	526709.5	895899.9
Italy	323	17951704.3	44602898.4
Portugal	298	1026341.5	1906095.8
Spain	120	33174531.4	59100460.2
Sweden	300	1353620.0.2	2928149.0
Turkey	287	7198781.2	8217745.0

[Source: Elaboration on Hype Auditor data]

If we start with Figure 15, we can see the internal distribution of the *whole* audiences of the top-followed channels in Belgium, Bulgaria, Czech Republic, Germany, Greece, Italy, Portugal, Spain, Sweden, and Turkey. Basically, the shorter the boxplot, the smaller the audiences from the countries indicated in the vertical axis, where we listed all the nationalities included in the demographics; when the plot is skewed right, conversely, that would indicate a large share of audience from the corresponding country. In this way, and with all the possible limitations due to the considered dataset, we aim at individuating the level of *internalization* of the audiences. In the case of top-listed channels for Belgium, for instance, the longest boxplots correspond – not surprisingly – to audiences from Belgium, Netherlands and France; in the case of Bulgaria, the wider audience is from Bulgaria; in Czechia, from Czechia, Slovakia and Brazil (as some of the top-influential channels are from Brazil, whose population outnumber the local twenty to one). The main audiences of top influencers in Germany are from Germany, Romania and Pakistan, rather than from German-speaking areas, such as Austria or Switzerland: possibly, due to the communities of immigrants from those countries, in a way that would make social media more useful for internal social cohesion, somehow, than for international communication. The case of Portugal is different, as the most followed channels predictably have a relevant audience in Brazil; while the top-channels in Italy, Greece and Turkey are mostly followed at the national level.

The plotted distribution of languages, shown in Figure 16, would add some interesting elements to the analysis. In this case too, and unsurprisingly, national languages are dominant: see the boxplot about accounts popular in Bulgaria, Czech Republic or Italy; and so forth. Predictably too, minor languages are not used whatsoever, with the boxplot indicating the diffusion of Icelandic – or Latvian, or Bosnian, or Georgian, or Finnish – barely visible. In some cases, immigrants – what we used to call the “diasporic communities” created by the media [Appadurai 1996: 195] – play a part: see, for instance, the quota of Albanian-speaking

followers in the case of Germany; or that of the Uzbek-speaking in Czechia, Polish-speaking in Portugal and Arab-speaking in Turkey. The case of English, though, is very different, as it is largely used by the audiences in all cases, though at a variable degree – actually, its boxplot is almost everywhere the longest one, besides that of the native language.

There is no doubt that linguistic differences play a main part in the distribution of contents across Europe, we stated: and still, this unperfect overlapping between nationality of language of the audiences may be a hint of a different *force* shaping the media landscape. Practically speaking, the use of English is common, though the audiences – at least at the high-level of top-influential YouTube, TikTok and Instagram channels – are still mostly *national*, with the partial exception of Instagram. In order to make some order, we can refer to Manuel Castells’ analysis of the weak role played by cultural elements in the building of the European identity [2018: 184] – what he would refer to as the “Achille’s heel” of European Union. Based on the statistics collected by Castells, it is clear that “common culture” is hardly perceived as a significant element of being European [2018: 201], and that people are way more inclined to identify themselves as members of their *city* or their *country*, rather than as members of the EU [2018: 186-189 and 196-199].

We already touched upon the importance of comedies, as a cinematic and Tv genre which is perceived as being closer to what people experience in daily life – and *proximity* is the word that comes to mouth in this case too. We are probably back to the importance of banal nationalism [Billig 1995], already discussed in deliverable D3.4: the simple fact that people rely on a set of symbols, practices and images which make them aware of, and familiar with the environment they are part of. That these rituals would be performed in brand-new and allegedly *global* platform – namely, YouTube, TikTok and Instagram – should not come as a surprise, unless we share a naive, if not silly interpretation of technological innovation. New technical formats always appropriate pre-existing contents, Marshall McLuhan first observed [1964; for the common interpretation of McLuhan’s seminal idea, see Bolter & Grusin 1999], and the same can be told for contemporary platforms. We probably owe to John Ruggie [1993] the idea that globalization would not eliminate the local dimension, while rather giving rise to the so-called *space of places*, in opposition of the space of flows of financial and information transactions – an idea that Castells himself [1996] would take on, with no acknowledgment at all. And this might happen to Europe as well, in the end, with platformization somehow strengthening, rather than weakening, the pre-existing forms of national identity – and, if anything, regardless of the used language. There is no doubt that further research will be needed – and particularly qualitative research on people’s views, imaginary and ideas – in order to cope with such a complex problem.

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