

Domestic Video Streaming Services - Characteristics, Offer and Perception of Users in Serbia¹

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Abstract

The second half of the past decade was marked by the explosive growth of streaming platforms and services both in Serbia and globally. Numerous foreign services have emerged after Netflix debuted in Serbia in 2016. Simultaneously, a number of local services have also emerged, attempting to take advantage of the benefits of local access and native content.

The objectives of this work are to outline the most popular domestic streaming services in Serbia, their unique features, business and communication strategies, and the programs they offer. It also looks at the traits and perspectives of these services' users with regard to series viewing and domestic streaming in general. A total of 139 customers of domestic streaming services completed a specifically designed questionnaire, which was included in the research done in June and July of 2023. The questionnaire responses were evaluated using quantitative descriptive and comparative statistical methods. The majority of users of domestic streaming services, according to the data, do so primarily because of the services' affordability and ease of use; the domestic series and movies that these services offer, however, are not as big of a selling point as previously believed. The overall conclusion of the research is that there is a trend toward westernization of tastes and habits that is being influenced by globally dominant streaming services and spreading to domestic audiences and domestic content viewers. This could eventually have a very negative impact on domestic production, streaming, and Serbia's distinct cultural identity in general. This research fills the gap in understanding the characteristics and preferences of Serbian audiences regarding domestic streaming services, especially in comparison to global competitors like Netflix

Keywords: streaming, audience, RTS Planeta, Apollon, series, movies

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Introduction

By 2016, the phenomenon of video streaming and video-on-demand payment in Serbia was relatively unfamiliar. This year can be considered a turning point, as video content consumption in this manner began to enter the mainstream, primarily due to the introduction of Netflix, a leading video-on-demand service, in the country, and later in the year, Amazon Prime Video.

This option and the shift in how a growing segment of the audience consumes online video content, including series and films, have introduced several innovations such as individualization in viewing (Radošinska, 2017), the selection of time and place of viewing (Jenner, 2018: 109), control over content (Cabral Martins, 2019), and many others.

This was a novelty for people in Serbia because awareness of the subscription-based model, specifically, a model where users can pay for exclusive content to watch online, was not particularly prevalent among the media audience. Instead, television was the most common way to consume series and movies (Simeunović Bajić, 2015: 17). However, this does not mean that streaming technology was not used in the country. Primarily, YouTube was one of the most utilized platforms in Serbia at the time for both information and entertainment purposes (Pavlović & Obradović, 2015). Additionally, video streaming was also employed through accessing pirated and illegal streaming sites and their content. Data from 2015 indicated that the level of digital piracy in the country was 68% (Export.gov, 2018), which included viewing pirated series and films online.

Nevertheless, the emergence and popularity of Netflix worldwide and in Serbia has led to new behaviors, habits, and expectations among audiences due to the different methods of content creation, distribution, and promotion (Milosavljević, 2024). In other words, a new market has emerged, in which all legal streaming content distributors operate. Given that this was a complete novelty both for the audience and for the entire media system and regulatory framework, the aim of this study is to present the conditions within this new market, with a particular emphasis on how domestic streaming services have attempted to establish a foothold and the perceptions of users who engage with them. This paper seeks to answer the following question: How do domestic streaming services in Serbia compete with global platforms in terms of user preferences and content offerings?

SVOD market conditions in Serbia

The innovations introduced by the development of video-on-demand services have radically transformed the media market, which has been only gradually adapting to these rapid changes. The lack of SVOD awareness and presence resulted in a lack of regulation for foreign services. For the first year, they did not even pay taxes (Milosavljević, 2024: 128), while only two years after their initial arrival, the

government of the Republic of Serbia set a goal to regulate these services (Radna verzija Strategije razvoja sistema javnog informisanja Republike Srbije do 2023. godine, 2018). The slow adaptation of regulatory market frameworks to the new entities in Serbia's media system is also indicated by the fact that until 2020 they did not even have to have a legal representative (Poverenik za informacije od javnog značaja i zaštitu podataka o ličnosti, 2020), and to this day, they are not registered as any form of media services.

These data indicate that video-on-demand services in Serbia were granted an exceptionally high degree of market freedom, particularly during the initial years of their arrival. This is especially notable when compared to other countries such as Poland or Denmark, where regulations mandate that foreign video content providers must invest in domestic production and, consequently, offer local programming in their catalogs (Vlassis, 2023), or China, where the market is so rigidly regulated that Netflix and its content are not even granted direct access (Shi & Zhou, 2021). Netflix, Amazon Prime Video, and other services available in Serbia have no obligation to offer local content to the public, nor are they required to subtitle or dub their content. In other words, regarding many aspects, these services have no need to treat Serbia as a distinct market. This is evident from the example of Netflix, which, throughout its existence, has offered only two titles produced in Serbia: the film *Bad Blood* (Nečista krv: Greh predaka) and the documentary *The Long Road to War* (Dugo putovanje u rat) (Milosavljević, 2024: 143).

On one hand, such a situation may represent an advantage from the perspective of not needing to define specific business, distribution, and communication strategies. On the other hand, neglecting local market specifics can have several negative consequences for the efficiency of media operations. This is particularly relevant when considering the results of earlier studies on audiences in Serbia, which indicate that a significant part of the audience is not enthusiastic about foreign, especially English-language content, for several important reasons. Firstly, nearly one-third of the population generally harbors negative sentiments toward the West and its content (Institut za evropske poslove, 2023; Gavrilović, 2011). Secondly, for instance, while the average American citizen in 2016 had to allocate 0.05% of their monthly salary for services like Netflix, a Serbian citizen has to spend more than 2% (Milosavljević, 2024: 133). In other words, this type of media consumption and entertainment is considerably more expensive. Finally, it is important to note that there is a significant portion of the audience, particularly among the older population, who prefer domestic content over the foreign content offered by these services (Ipsos Strategic Marketing, 2015).

This indicates that there is a significant market gap for SVOD services that distribute films and series in Serbia, which foreign competitors are unable to adequately cover due to the specific characteristics of certain audience segments that favor more affordable domestic content. While several studies have examined the global rise of streaming platforms (Lobato, 2019), there is limited research focusing on how local streaming services in smaller markets like Serbia navigate this competitive landscape

Domestic streaming services – characteristics and types

Before major foreign SVOD services became available in Serbia, and for several years thereafter, the offering of domestic and regional content distributed in this manner was very limited, primarily oriented toward the concept of “Video Club” packages within IPTV television services (Milosavljević, 2024: 125). However, with the rise in popularity and accessibility of traditional SVOD services, several domestic services emerged that aimed to fill a market niche that was not adequately addressed by large foreign services, whether due to content offerings, pricing, or user access.

Among the most significant domestic services in Serbia are:

1. Apollon – The largest domestic SVOD service operating on a traditional monthly subscription model costing 499 dinars per month. Established in 2021, it boasts the largest library of both foreign and domestic content among domestic services, with approximately 10,000 hours of programming. All titles are either subtitled or dubbed, with the domestic content primarily comprising productions from Telekom Serbia (on whose platform it is available) and the media company Pink (Apollon, n.d.). The major advantage of this service is its exceptionally extensive foreign film library.
2. RTS Planeta – A service of the public media company Radio Television of Serbia, available since 2018. It is free for users within Serbia, while international users are required to pay for access. It offers live streaming of RTS channels, as well as a variety of on-demand audio and video content such as shows, documentaries, and PGP RTS publications (RTS PLANETA, n.d.). The majority of the offered content is domestic, but the “Cinema” section includes foreign films. This service particularly gained popularity and media presence during the COVID-19 pandemic when it was used for streaming and providing educational materials to students during the lockdown (Stojanović, 2020: 124).
3. Pickbox NOW – A regional streaming service operating in the former Yugoslav countries since 2014. The “Start” package is priced at 575 dinars and provides access to a catalog of foreign series and films with subtitles, with some animated content being dubbed (Pickbox Now, n.d.). Domestic content is virtually absent from the platform, but its major advantages include its long-standing presence, regional focus, especially regarding subtitles, and availability on the platforms of both mentioned cable operators.
4. Moj OFF – A domestic service established in 2020, primarily focused on foreign films that have been shown at festivals or were relatively short-lived in theaters, while its series offering is very modest, comprising only a few titles. The basic subscription package costs 349 dinars but it does not include premium movies and festival streaming (Moj OFF, n.d.).
5. KinoKauch – Another domestic service specializing in European art-house and documentary films (KinoKauch, n.d.). It is not an SVOD but rather

a TVOD service, which means that it is not subscription based (monthly payment for unlimited or limited catalog) but rather transactional based, where renting or purchasing each film is charged separately. Its greatest advantage is that it allows users to follow certain film festivals.

In addition to the aforementioned services, there are smaller platforms that are typically free and function as digital repositories or websites for specific productions, but they offer very limited content and are often highly specialized. The only major potential competitor already mentioned is YouTube, where users can find certain domestic and foreign films and series uploaded by rights holders or other parties for free viewing. Since 2024, RTS has created a dedicated channel on this platform named *RTS TV serije*, which offers domestic serial productions owned by the broadcaster, completely free of charge.

If we analyze the specifics of these services and classify them according to categories of advantages and disadvantages from the perspective of audience needs as outlined in the previous section, it is interesting to note the significant differences in what each service offers and which segment of the audience it targets.

Table 1: Overview of Specific Advantages and Disadvantages of Each of the 5 Domestic Services

Name of Streaming Service	Advantages	Disadvantages
Apollon	Extensive library of both foreign and domestic content, including dubbed and titled content.	Subscription price near to the basic Netflix package in Serbia.
RTS Planeta	Large selection of domestic productions, association with the public media brand in Serbia, and no subscription fee.	Relatively small catalog of titles, particularly foreign content.
Pickbox NOW	Longest-standing streaming service available in Serbia with a comprehensive catalog of foreign series and films.	Lack of domestic content and higher price compared to other services.
Moj OFF	Low price of the basic package and a catalog tailored to specific tastes.	Very limited series selection and lack of domestic content.
KinoKauch	Catalog offering specialized content and the ability to follow film festivals..	Transaction-based model lacking the flexibility of SVOD services and absence of domestic content.

Thus, if the primary motivation for viewers in selecting particular series is access to domestic content, they will most likely choose Apollon or RTS Planeta,

especially if they are more inclined toward traditional national media and public broadcasting services. On the other hand, if language barriers are a major issue when accessing popular content, Pickbox NOW or Apollon will be preferred, as they offer adequate subtitles and a large catalog. Fans of series and films who favor lesser-known, art-house productions are more likely to choose Moj OFF or KinoKauch. In other words, the video streaming market in Serbia should not be viewed solely through the lens of domestic versus foreign services, but rather as a much more complex and nuanced landscape, even when considering only domestic services.

Methodology

The objective of this study is to examine the tastes and preferences of the domestic audience regarding watching series and movies online and the use of five domestic streaming services. The research instrument utilized was a specially designed questionnaire consisting of 30 questions, which allowed respondents to select one or more of the provided answers. This questionnaire was created using Google Forms and distributed online during June 2023 using a snowball sampling method.

The analytical approach employed was a combination of quantitative descriptive and comparative content analysis. This analysis was conducted using SPSS 24.0 software. It is important to note that although the questionnaire was completed by 756 respondents, only the responses of 139 individuals were analyzed. This subset was selected because these respondents confirmed that they use at least one of the five domestic streaming services in question, ensuring that the data collected is relevant to the scope of this study. The categorization and comparison of responses were conducted based on the selected services used by the participants (allowing them to choose multiple services). It is important to note that the responses for Moj OFF and KinoKauch were aggregated due to significant similarities in the characteristics of these two services and the overall number of responses relative to the sample size. This aggregation was performed to enable a more comprehensive and relevant statistical correlation and comparison. By combining the data for Moj OFF and KinoKauch, the analysis aimed to enhance the robustness of the statistical results, ensuring that the comparisons and correlations drawn reflect a more accurate and complete picture of user preferences and behaviors in relation to these streaming services.

Results and discussion

The fact that only 18.39% of the total respondents (139 out of 756) use any of the mentioned domestic streaming services indicates that the market, or the audience interested in the content offered by domestic streaming platforms, is relatively small. Among users of domestic streaming services, there is a significantly higher proportion of females (73.4%) compared to males (26.6%). Particularly noteworthy is that the

largest age group is between 31 and 45 years old (40.3%). This is a significant finding as it highlights the demographic differences between domestic and international streaming service users. For instance, the average user of Netflix and other major global streaming services tends to belong to a younger demographic (Pattinson, 2024), specifically between the ages of 16 and 35 years (Mishra & Esaimani, 2020: 8), with some studies indicating the predominant age range as 21 to 25 years (Santhosh, 2019: 82). In contrast, the average user of domestic services is somewhat older.

This age disparity also reveals another characteristic—employment status. A substantial 90.6% of respondents who use domestic services are employed and live in larger families (3 to 5 members) – 53.2%. Additionally, the market for domestic providers has its own peculiarities, evidenced by the fact that only 19.4% of users watch series and films for several hours a day, with most doing so only a few times a week (43.2%). However, when they do engage, they often dedicate a longer period to it, watching several episodes of a series consecutively (79.9%). On the other hand, over a quarter of users primarily watch series and films on television channels (25.9%), although streaming remains a dominant method (61.2%). Surprisingly, in terms of general characteristics, only 16.5% prefer domestic series, even on domestic platforms, while a substantial 69.8% favor foreign content, particularly in the English-speaking domain.

Thus, **the average follower of domestic streaming services in Serbia** is most likely to be female, between 31 and 45 years old, employed, and has a large family. They watch series and films, predominantly in English, several times a week, but in a longer period of time, more frequently online but also significantly on television.

This considerable homogenization of the audience and their habits is also reflected in the types of domestic services they use (Chart 1). Specifically, among the users of domestic services, 58.3% use RTS Planeta, while only half as many (26.6%) use Pickbox NOW. The percentages are even lower for those who access content through Apollon (16.5%), with Moj OFF and KinoKauch being followed by only 3 individuals, or 2.2%.

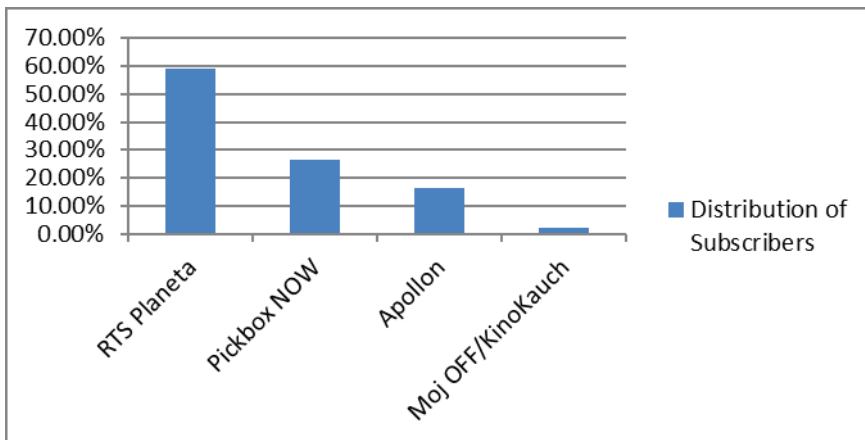


Chart 1: Distribution of Subscribers to Domestic Streaming Services in the Study Sample

The significant dominance of RTS Planeta can be explained by its advantages, which can be related to the general habits of the audience. Firstly, it is important to note that part of the audience is oriented toward watching content on television. Since RTS is a public media service, there is a **significant connection between traditional and contemporary content consumption**, both due to the same offering and the same brand association. Additionally, a crucial factor is that this **service is free**, which is particularly relevant considering that this segment of the audience does not watch series and films daily, but occasionally. Therefore, a constant subscription might seem uneconomical.

On the other hand, the results also indicate that the **duration of a service availability and range of content** is an important factor in the choice. Thus, Pickbox NOW and RTS, being among the oldest services, have the highest number of users, while Apollon has fewer, and services focusing on very narrow niches naturally have the fewest users.

The fact that content quality is not particularly relevant to users is also indicated by the responses to the question, “What are the main reasons for choosing these services?” Thus, only 18% of respondents prioritized content quality, while the two main reasons were **ease of use** (25.9%) and **content quantity** (23%). The greatest advantages of watching streaming video compared to traditional viewing of series and films are the **freedom to choose the time and place** of viewing (44,6%), as well as the freedom to choose from a **large amount of content** (25,2%). On the other hand, the greatest drawbacks are the high **cost of the service** (18.7%) and the fact that there are many services offering different content, so they **cannot have everything they follow in one place** (18.7%), which can again be linked to the unwillingness to pay for multiple services.

When examining significant statistical differences in cross-referenced responses, considering the dispersion of responses, there were not many notable indicators. It is interesting to note that all users over the age of 65 who utilize streaming services chose RTS Planeta, whereas all users of Moj OFF or KinoKauch were between the ages of 31 and 45, have a job and live with only one more person. Additionally, the highest proportion of users preferring domestic content among subscribers was observed for RTS Planeta (27.7%) and Apollon (14.3%), whereas this percentage was significantly lower for Pickbox Now and Moj OFF or KinoKauch (2.9% and 0%, respectively).

When comparing user responses regarding what they perceive as the greatest advantage of a particular video streaming service, it is significant that these perceptions largely align with those presented in Table 1. Specifically, the majority of users regard the ease of use and accessibility as the greatest advantage of RTS Planeta (31.5%), while most users of Apollon highlight its extensive catalog as its primary strength (25%). In contrast, users of Pickbox Now and those subscribed to Moj OFF or KinoKauch consider the high-quality content offered by these services to be their best feature (28.6% and 33.3%, respectively).

Based on all the responses, it can be generally concluded that the market for domestic streaming services is targeted at somewhat older users compared to global

services like Netflix. This demographic is too old to be the primary target group for such streaming services but still too young to rely exclusively on traditional media channels. Nevertheless, traditional channels and brands play a significant role in familiarizing users with streaming technology, serving as a bridge to this relatively new medium. For this segment of the audience, having high-quality local content is less important than ensuring that the service is not excessively expensive and offers a comprehensive catalog for the price. However, given the differences in preferences and practices within this audience, it is possible to categorize its members into three segments based on their responses and the characteristics of the services they use:

1. *Audience with Pre-Streaming Preferences and Habits* – This is the largest segment, which includes not only younger users but also older members of the audience. They are characterized by their use of services that extend traditional media, a preference for ease of use, familiar, and somewhat local content, and an inclination to avoid subscription fees for content viewing (which is related to traditional television viewing habits).
2. *Audience Primarily Consuming Foreign Content on Domestic Services* – This is a slightly smaller segment that subscribes to domestic services but predominantly watches foreign content with subtitles or dubbing.
3. *Audience with Very Specific Tastes* – This is a very small segment, mostly comprising individuals under 45 years old living in small communities, with highly specific demands regarding film and television content. They use domestic services that provide such niche content.

Conclusion

Although segmented, the domestic market for on-demand streaming services is very small. Overall, audiences tend to prefer global streaming services, especially among the younger demographic. On one hand, this segmentation can be argued to be generationally conditioned. Domestic services are primarily used by individuals over the age of 30, whereas younger individuals are more inclined toward global services. These observations, coupled with the fact that foreign services do not offer domestic content, may lead to the risk of a certain form of taste assimilation that is already in progress (Goncharenko et al., 2023: 14) in line with global trends of major services, particularly considering that even those who follow domestic series and films do so significantly less than they did a decade ago. This trend of diminishing importance of domestic programming and the role of domestic content providers, combined with the issue of the relative lack of regulation in the streaming market in Serbia, especially concerning the protection of domestic companies and content, may have significant implications for cultural specificities, habits, and even a form of cultural identity among the audience in Serbia, which is, in part, shaped through domestic content as segments of culture and cultural heritage (Đurković 2005: 358). Therefore, to counter the trend of westernization and cultural imperialism

(Tomlinson, 1991), domestic streaming services should consider investing in high-quality, original local productions and explore collaborations with regional content creators to maintain cultural relevance.

Analyzing three distinct groups of followers of domestic streaming services reveals that several factors influence the existence of domestic streaming services. For the group *Audience with Pre-Streaming Preferences and Habits* the factors include ingrained habits, the need for simplicity, and familiarity. In the case of the *Audience Primarily Consuming Foreign Content on Domestic Services* it can be assumed that language barriers or differences in pricing compared to foreign services play a role. For the *Audience with Very Specific Tastes* it cannot even be asserted that they are genuinely interested in domestic services, but rather in specific content that global services do not provide. Particularly in the case of the latter two groups, it is quite possible that their needs could be met in the future through changes or adjustments in the offerings of international services, which would result in a significant reduction in the market where domestic services can compete with the global ones.

It should be noted that this research does not represent a study of a representative sample, and a much more comprehensive and in-depth study of the viewing habits, preferences, practices, and expectations of streaming service audiences in Serbia is needed. One of the additional limitations of the research is that not all analyzed services followed the same subscription model, particularly *RTS Planeta*, which is free, and this has undoubtedly influenced the structure of responses and audience preferences. However, the data obtained are sufficient to conclude that it is crucial to take certain measures to protect and ensure the development of both domestic production and distribution, in a way that allows them to compete with major international services. This is not only about protecting the domestic market but also about preserving cultural specificities and identity.

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Domaći video streaming servisi - karakteristike, ponuda i percepcija korisnika u Srbiji

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Apstrakt

Druga polovina prethodne decenije obeležena je naglim rastom striming platformi i servisa, kako u Srbiji, tako i na globalnom nivou. Brojni strani servisi su se pojavili nakon što je Netflix postao dostupan u Srbiji 2016. godine. Istovremeno, nastao je i niz lokalnih servisa, koji su pokušali da iskoriste prednosti lokalnog pristupa tržištu i domaćeg sadržaja.

Ciljevi rada su da predstavi najpopularnije domaće streaming servise u Srbiji, njihove jedinstvene karakteristike, poslovne i komunikacione strategije, kao i programe koje nude. Takođe, rad analizira osobine i stavove korisnika ovih servisa u vezi sa gledanjem serija i domaćim strimingom uopšte. Istraživanje je sprovedeno u junu i julu 2023. godine putem posebno kreiranog upitnika, koji je popunilo 139 korisnika domaćih striming servisa. Odgovori su analizirani korišćenjem kvantitativnih, deskriptivnih i komparativnih statističkih metoda. Prema prikupljenim podacima, većina korisnika domaćih striming servisa ih koristi prvenstveno zbog pristupačnosti i jednostavnosti upotrebe, dok domaće serije i filmovi nisu toliko presudni kako se ranije smatralo. Zaključak istraživanja je da postoji trend ka zapadnjačkoj orijentaciji ukusa i navika, pod uticajem globalno dominantnih striming servisa i koji se širi na domaću publiku i potrošače domaćeg sadržaja. Ovo bi moglo imati veoma negativan uticaj na domaću produkciju, striming i na jedinstveni kulturni identitet Srbije u celini. Ovo istraživanje popunjava prazninu u razumevanju karakteristika i preferencija srpske publike kada su u pitanju domaći streaming servisi, posebno u poređenju sa globalnim konkurentima kao što je Netflix.

Cljučne reči: streaming, publika, RTS Planeta, Apollon, serije, filmovi

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