SVOD usage in the European Union – 2025 data

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Table of content

- Introduction 3
- Methodology 4
- Glossary 6
- Limits 7
- Main findings 8
- Part 1: The SVOD viewing landscape in 9 EU countries in 1 year 14
- Part 2: Evolution of viewing time 54
- Part 3: Comparison – share of catalogues and share of viewing time 65
- Appendix 82

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Introduction

The aim of this report is to provide an overview of viewing time on SVOD services for works (films and TV series) by origin, genre and age (for films only) by analysing SVOD viewing time data in 9 EU countries (Denmark, Finland, France, Germany, Italy, Netherlands, Poland, Spain, Sweden - in this report EU9).

Research questions:

- What is the share of viewing time for films and TV content by region of origin and country of production on SVOD services over a one-year period? How has this evolved over time?
- What is the viewing time of works by format (fiction, documentary and animation), by genre (comedy, drama, thriller…) and by region of origin? How does the age of a film and its region of origin affect SVOD consumption?
- What proportion of viewing time is devoted to national and non-national European films and TV series on SVOD services? How have these proportions evolved over time?
- What proportion of viewing time is spent on theatrical and non-theatrical films? How has this proportion changed over time?
- What proportion of total SVOD viewing time is accounted for by original TV series and films? How has this changed over time?
- What are the viewing time shares of films and TV series by origin on SVOD?
- What is the concentration of films and TV series in terms of viewing time on SVOD services?

Methodology

- The viewing time data were provided by Digital i from the four main service providers, representing nine SVOD country catalogues.
- The catalogue data was a snapshot extracted from JustWatch in July 2025.
- Viewing time is calculated in minutes.
- For viewing time, the retained time frame is from 1st January to 31st December 2025.
- A work is defined as either a film or a TV season.
- Information regarding original content is based on Digital i data. For a title to be considered a streamer's original, it must be marked as such by Digital i and streamed on the same platform that produced the title. This means that Netflix originals are only counted as such when they are watched on Netflix. Streamers' originals exclude content labelled as 'exclusive', coproductions with TV channels and films released in cinemas.
- Only the first production country of a work is considered when identifying the region of origin. This is the case for coproductions when more than one country is listed for the origin of the work.
- The regions of origin for works are:
  - EU27 (member states of the European Union)
  - GB (works which have as first production country the United Kingdom)
  - Other European countries (all other member states of the Council of Europe)
  - USA
  - Other international (all other countries)

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Methodology

- Formats were assigned by using IMDb genre listings and reassigned according to the following rules:
  - If 'Animation' is in the IMDb genre, the work is classified as Animation.
  - If 'Documentary' is in the IMDb genre, the work is classified as Documentary.
  - All other works are classified as 'live-action' for films and 'Fiction TV' for TV seasons.

- For the genre analysis, only live-action titles were considered. Works were counted as many times as they have genres.

- Genres were assigned by using IMDb genre listings (action, adventure, biography, comedy, crime, drama, family, fantasy, game-show, history, horror, music, musical, mystery, news, reality-TV, romance, sci-fi, short, sport, talk-show, thriller, war, western).

- Certain genres have been grouped in this way:
  - Thriller with crime and mystery.
  - Action with adventure, war and western.
  - Sci-Fi with fantasy
  - Game-show with history, music, musical, news, short, sport, talk-show together in 'other'.

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Glossary

- Catalogue: the full list of titles made available by a service in the countries of the sample.
- Film: all feature films, fiction films, documentaries or other content available in the “Film” / “Movie” section of the platforms of the study are considered.
- TV season: all content classified as “TV” in of the platforms of the study is considered.
- Format: a classification category based on the production medium and factual intent.
- Genre: a classification category based on the narrative elements that create the story arc.
- Original: title that a streaming platform financed, commissioned, or exclusively produced in opposition to acquired titles.
- SVOD (Subscription Video On Demand): services which propose for a monthly fee a catalogue of works available on demand.

Limits

- The Digital i sample of households is statistically representative of the households in the given countries. Sample sizes range from 600 households (1 500–2 000 individuals) in the Netherlands to 1 250 households (3 000–4 000 individuals) in Germany.

- The titles were matched through databases with their countries of production. The consistency of data is obtained by matching each entry with a unique original title. There may be small errors in the identification of a work.

Main findings

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A. THE SVOD VIEWING TIME LANDSCAPE

The vast majority of usage is for live-action fiction series

The evolution of viewing time shows TV seasons dominating consistently over the period. TV seasons dominate viewing time due to their longer format compared to films. Since 2020, the share of viewing time accounted for by TV seasons has never fallen below 75%. SVOD usage is also more geared towards live-action content (85% in 2025) than documentaries and animations (15%) regardless of programme type.

Drama and thriller are among the most popular genres of live-action content

Dramas and thrillers are the two most popular genres. They account for 39% of viewing time for live-action films and 52% for live-action TV seasons. However, some differences emerge when comparing the viewing time of films and TV seasons by genre. The action genre accounts for 19% of time spent watching films, but only 9% of time spent watching TV seasons.

Viewing is concentrated in a small number of titles

In contrast to the depth of the catalogues, SVOD usage is also quite concentrated, with 100 works representing less than 1% of the catalogue and accounting for around 15% of total viewing time. Both films and TV seasons are subject to a high level of concentration in terms of viewing. This suggests that SVOD usage includes popular titles as well as a wide range of more niche content, including local content.

Originals - in particular TV series - are among the most successful programmes

Original films and TV seasons from streaming services represent a significant portion of the most-viewed programmes. Original content accounts for only 44% of TV seasons viewing and 22% of film viewing, when considering all viewing. Moreover, original films and series account for 63% of the top 100 programmes. Regarding the weight of EU27 originals in the total viewing of EU27 works, it consistently receives a higher proportion of viewing time than content from all origins. Original films are also more represented in the top EU27 films than in the top films of all origins (45% vs 40% in the top 100).

B. PERFORMANCE OF EU AND EUROPEAN CONTENT ON SVOD

European content accounts for 1/4 of SVOD usage

European content accounts for 25% of SVOD usage, with 16% attributed to EU content. EU films demonstrate a comparatively stronger performance than EU series. EU films account for 20% of film viewing, compared to only 14% for EU series. Non-EU European content is primarily made up of UK films and TV seasons, which have a relatively consistent share of around 8% each.

EU theatrical films in decline

The share of EU theatrical films in EU film viewing time has decreased sharply over time, from 80% in 2020 to 55% in 2025. The share of streamers' originals in film viewing increased to 30%. The remaining 15% of viewing time share is covered by non-theatrical films acquired or co-produced by the streaming platforms.

Key findings

EU content viewing time is stable

Since 2020, the proportion of viewing time allocated to EU content has remained relatively stable, with slight increases in viewing time of EU films and slight decreases for EU series. The share of EU national viewing time has increased, while the share of EU non-national viewing time has decreased by a similar amount. Meanwhile, the US share of viewing time has remained close to 60%.

Strong variations between countries

The nine countries in the sample have very different viewing shares for EU works (ranging from 9% to 25%) and, within EU works, for EU national content (ranging from close to 0% to over 20%).
Larger production countries rely more on national content and reach a higher viewing share for EU content. Smaller production countries, do not reach the same level of viewing even if they offset the relative lack of national content with EU non-national content in their SVOD catalogues.
Among the 9 countries, Spain has by far the highest share of viewing time for EU content, driven by the success of national original TV series, while Spain accounts for 20% of total viewing time across the nine countries, this figure rises to 45% when only EU national content is considered.

Viewing time of EU content far more concentrated than for content of all origin

The viewing time of EU content is much more concentrated than for content of all origin, both for films (the top 100 accounts for 37% of EU films viewing time vs 18% for films of all origin) and for series (43% for the top 100 vs 19% for series of all origin). Spanish works top the ranking of the most-watched EU films and series.

Content from Spain, France and Germany is the most successful in other EU countries
Spanish, French and German works account for 53% of viewing time spent on non-national EU works. Spanish TV seasons represent a particularly significant proportion of this figure (28% of non-national viewing in other EU countries) as do French films (25%).

C. COMPARING SVOD USAGE AND SVOD CATALOGUES

For EU works, SVOD usage does not reflect the composition of SVOD catalogues
In all but two countries in the sample (Poland and Spain), EU content is proportionally less watched than its share of the catalogues. The discrepancy is particularly pronounced in Finland where the proportion of EU content viewed is 15 percentage points lower than its catalogue availability.

The gap is especially due to non-national content
In four out of the nine countries, national content is viewed more frequently than its proportionate share of catalogues. Conversely, EU non-national content is viewed at a lower rate than its share of catalogues across all countries in the sample. The data suggests that streamers include a variable proportion of European non-national content, which struggles to achieve a corresponding audience.

Also gap by format and age of programmes

Documentaries, both films and series, are over-represented in catalogues when comparing with their viewing time share. Conversely, live action films are proportionally more viewed than their share of catalogues and live-action TV series even more. Clearly, EU catalogue films (aged five years or more) represent a smaller proportion of audience engagement (27%) than they do of catalogues (63%). However, there is no reason to believe that SVOD usage should align with the composition of catalogues, given that the latter also serves two purposes: the acquisition and retention of consumers.

No major gap by genres

The comparison between share of the catalogue and share of viewing time reveals no major discrepancy. Action, thriller and fantasy are the three genres over-represented in viewing time in both films and TV seasons. Conversely, comedies and family content are under-represented.

Part 1: The SVOD viewing landscape in 9 EU countries

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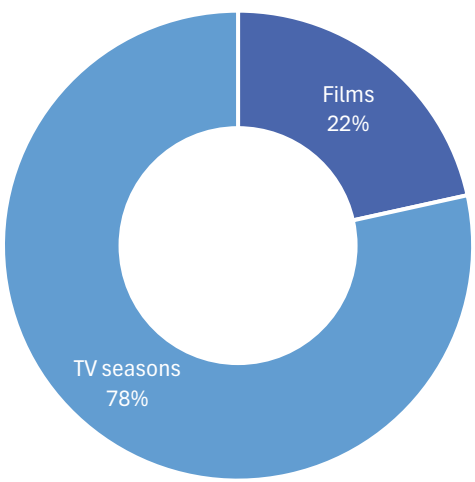
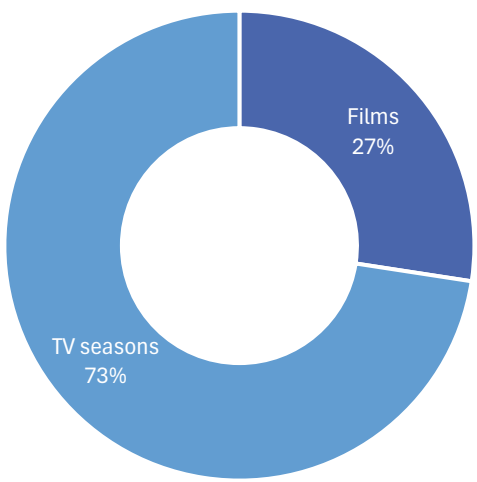
TV seasons get the lion share of viewing time

- Longer than films, TV seasons account for 78% of total viewing time on SVOD services in the sample.
- For EU27 works, TV seasons have a smaller share with 73% of total viewing time.

Split of viewing time between all films and TV seasons in EU9
In % of total viewing time for films and TV seasons, 2025



Split of viewing time between EU27 films and EU27 TV seasons in EU9
In % of total viewing time for films and TV seasons, 2025



Source: OBS based on Digital i data

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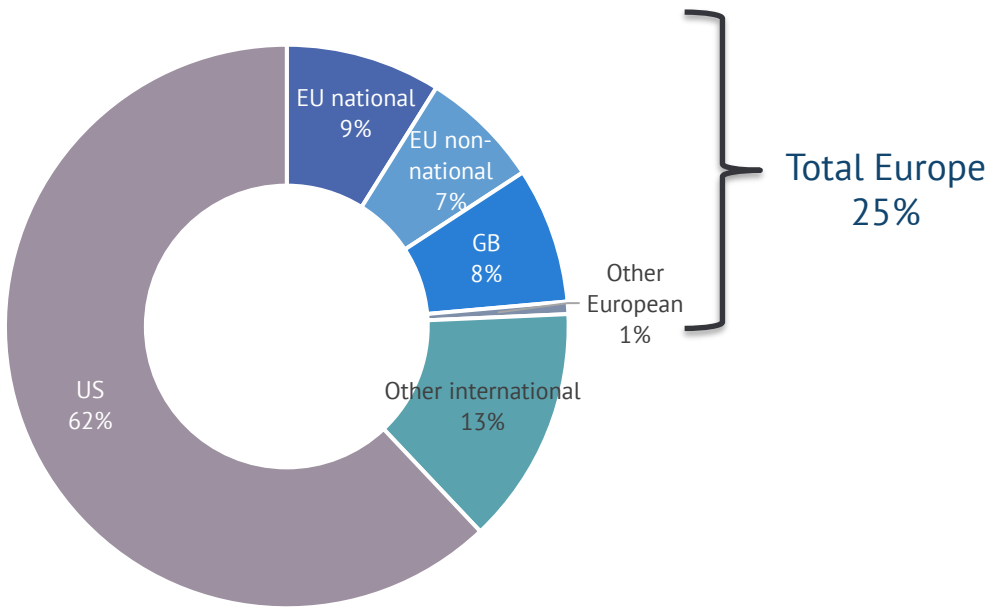
European works account for a quarter of total viewing time

- European content (EU27+GB+other European countries) accounts for 25% of the total viewing time of European SVOD subscribers in the nine EU countries.
- EU national works are watched more than EU non-national works.
- Unsurprisingly, US works account for 62% of the total viewing time.

Viewing time of all works (films and TV seasons) in EU9 on SVOD services
In % of total viewing time in hours by region of origin, 2025



Source: OBS based on Digital i data

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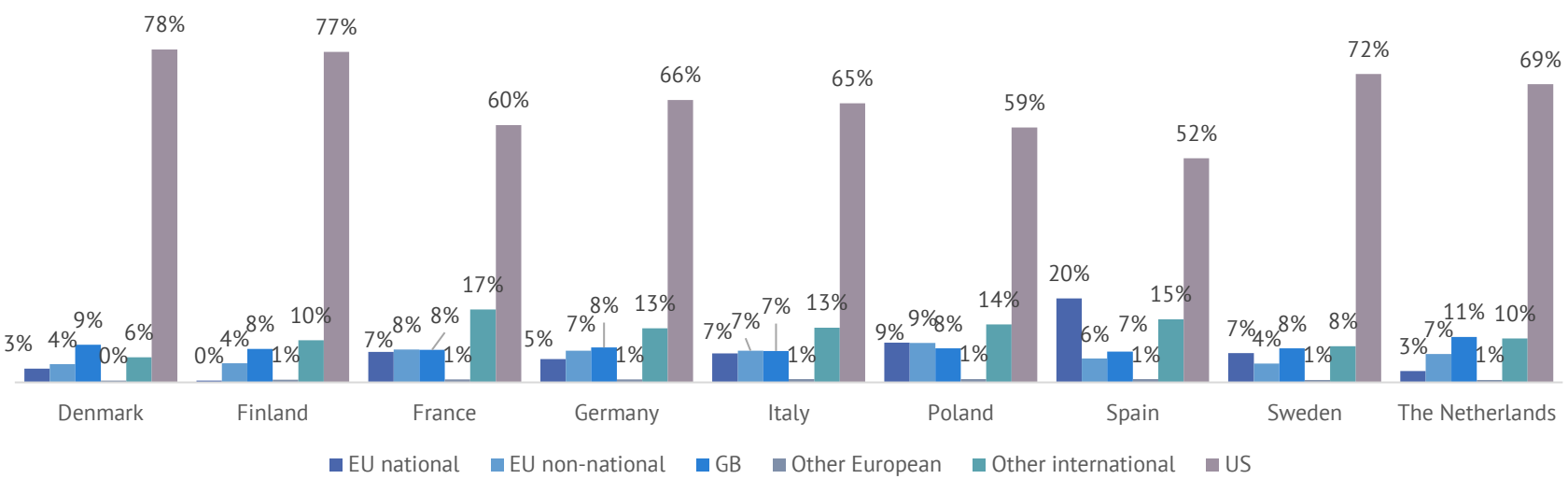
European works account for between 13% and 33% of total viewing time in the EU9

- With an EU9 average of 25%, the viewing of European works varies widely across the nine countries. The main difference is the proportion of viewing time devoted to national works.
- Spain has by far the highest share of viewing time for national works (20%), driven by streaming originals produced in the country, and Finland the lowest (0%).
- In six countries, viewing time for non-national EU works is higher than for national EU works.
- Poland has the highest proportion of viewing time devoted to non-national EU works (9%).
- EU content is over-represented in consumption in Spain and Poland, while US content is over-represented in consumption in the Nordic countries, the Netherlands and Germany compared to the EU9 average.

Viewing time by country and origin
In % of total viewing time in hours, EU9, 2025



Source: OBS based on Digital i data

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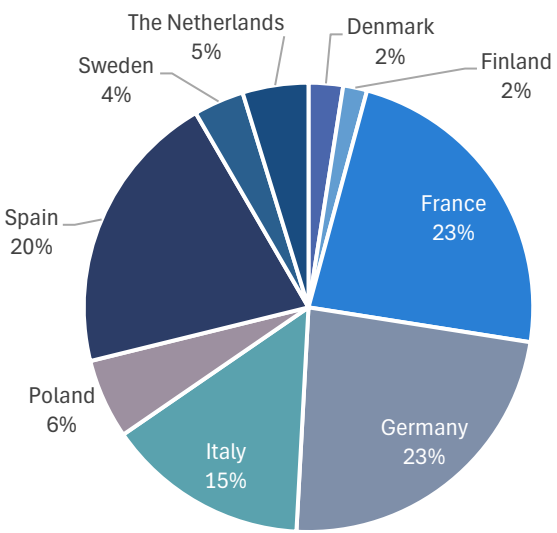
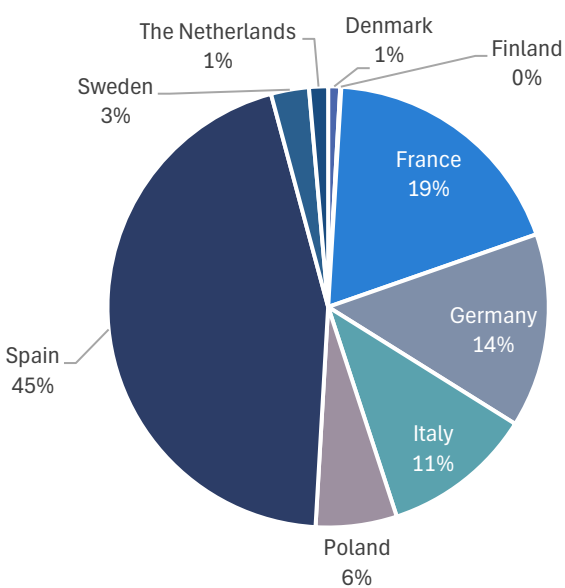
Spanish viewers represent almost half of EU national viewing time in the sample

- Spanish viewers represent 45% of total EU national viewing time and only 16% of total EU non-national, despite accounting for only 20% of total viewing time.
- French and German viewers represent 23% of total viewing time but respectively 26% and 25% of EU non-national viewing time.

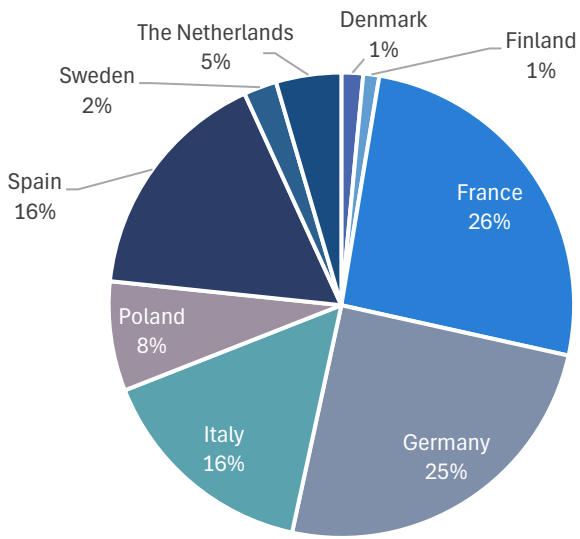
All origins - viewing time by country
In % of total viewing time in hours, EU9, 2025



EU national - viewing time by country
In % of total viewing time in hours, EU9, 2025



EU non- national - viewing time by country
In % of total viewing time in hours, EU9, 2025



Source: OBS based on Digital i data

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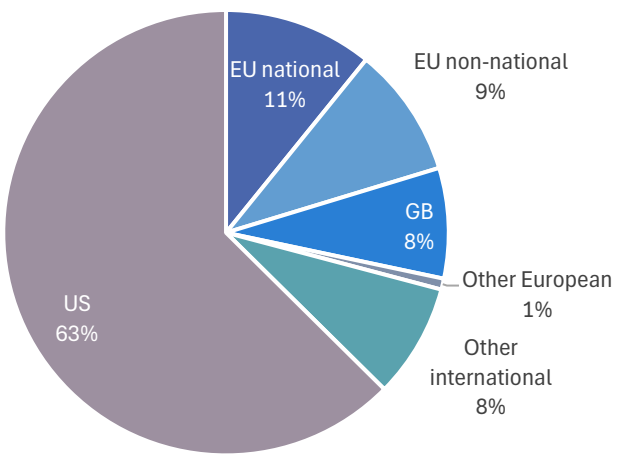
EU27 films perform comparatively better than EU27 TV seasons

- With 29% of total viewing time of films, European films have a higher share of total viewing time than European TV seasons with 23% of total viewing time of all TV seasons.
- EU national perform better than EU non-national for films and TV seasons.
- US TV seasons account for 62% of total viewing time and US films for 63%.
- Other international TV seasons perform significantly better than other international films (15% vs 8%).

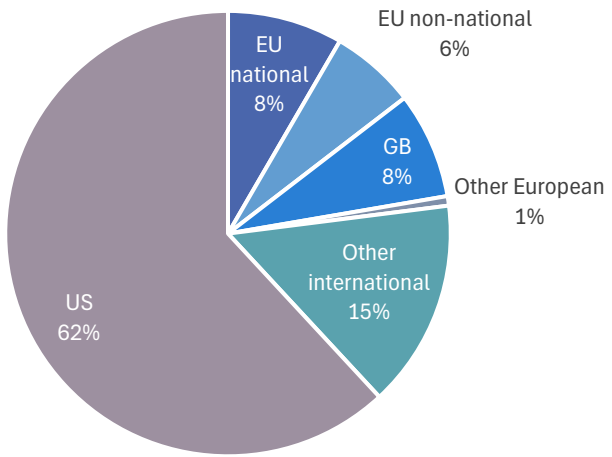
Viewing time of all films
In % of total viewing time in hours by region of origin, 2025



Share of total viewing time of European works:

Films 29%
TV seasons 23%

Viewing time of all TV seasons
In % of total viewing time in hours by region of origin, 2025



Source: OBS based on Digital i data

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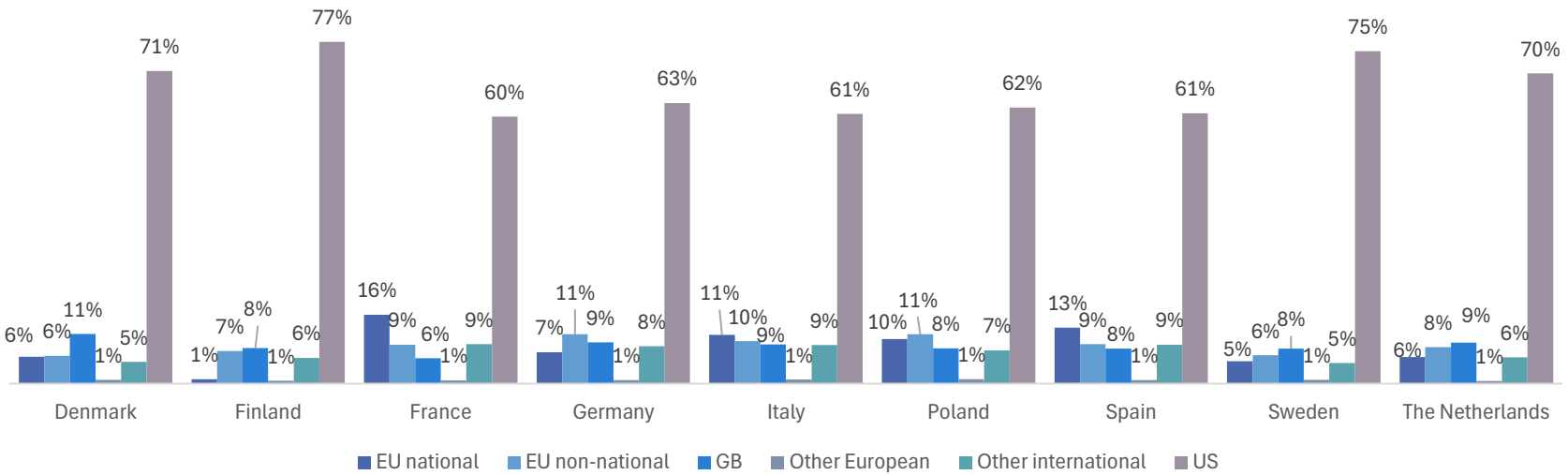
European films account for between 17% and 31% of film viewing time in the sample

- With an EU9 average of 29% of viewing time, the viewing of European films varies considerably between the nine European countries, the main difference being the proportion of viewing time devoted to national films.
- France has the highest proportion of viewing time devoted to national films (16%), while Finland has the lowest (1%).
- Germany and Poland have the highest share of viewing time for non-national EU films (11%).
- EU films are over-represented in terms of consumption in France, Italy, Poland and Spain while US films are over-represented in terms of consumption in the Nordic countries and the Netherlands compared to the average EU9 viewing time.

Viewing time for all films, by country and origin
In % of total viewing time in hours, EU9, 2025



Source: OBS based on Digital i data

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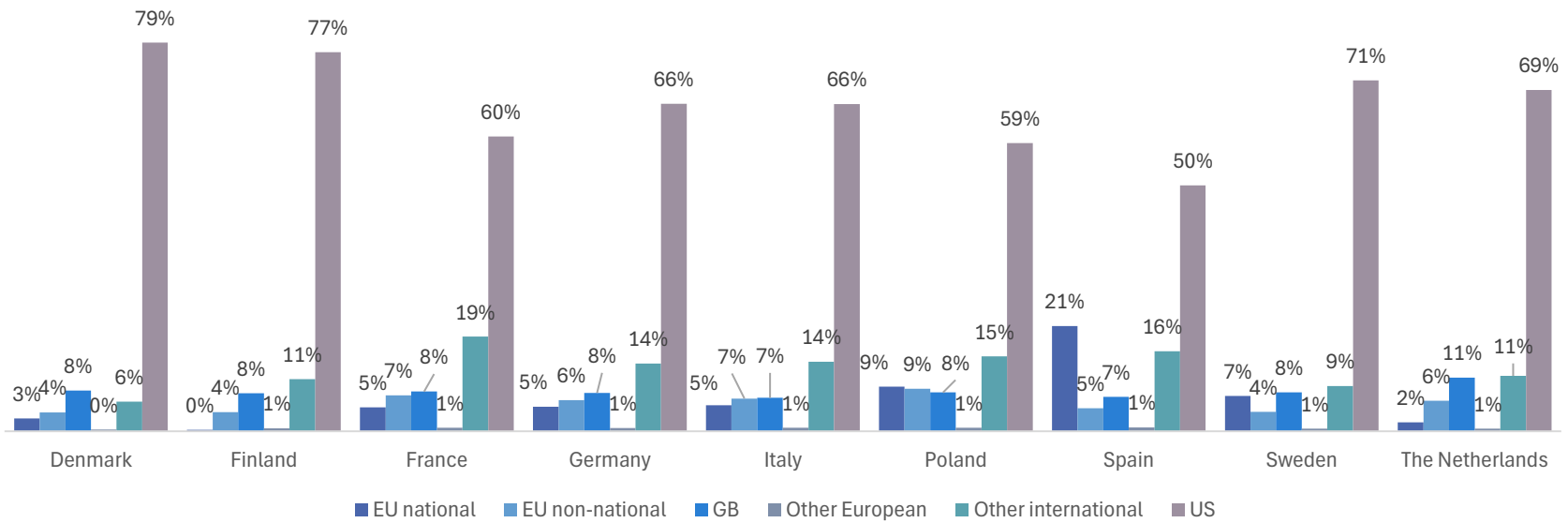
European TV seasons account for between 12% and 34% of TV seasons viewing time

- Spain has the country with the highest share of viewing time for national TV seasons with 21%, driven by streaming originals produced in the country, and Finland the lowest with 0%.
- The share of viewing time by EU non-nationals is higher than that by EU nationals in most countries of the sample, due to the success of Spanish, French or Swedish TV seasons.
- Poland has the highest share of viewing time for EU non-national TV seasons with 9%.
- EU TV seasons are over-represented in terms of consumption in Spain and Poland compared to the average EU9 viewing time.

Viewing time of all TV seasons, by country and origin
In % of total viewing time in hours, EU9, 2025



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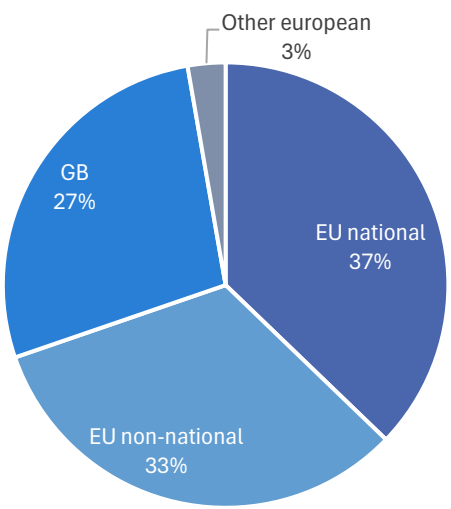
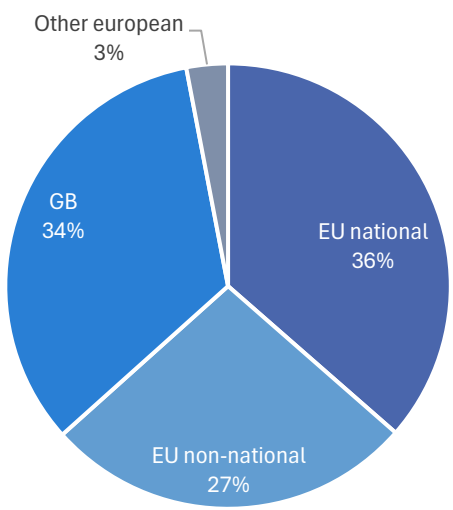
EU national content accounts for majority of European viewing time

- Viewing of national works by EU viewers accounts for the largest proportion among European content viewing time. This accounts for 37% of film viewing time and 36% of TV seasons viewing time.
  Films such as *A Widow's Game* or TV seasons such as *Billionaires' Bunker* are among the most popular.

Split of viewing time European films
In % of total viewing time in hours, EU9, 2025



Split of viewing time European TV seasons
In % of total viewing time in hours, EU9, 2025



Source: OBS based on Digital i data

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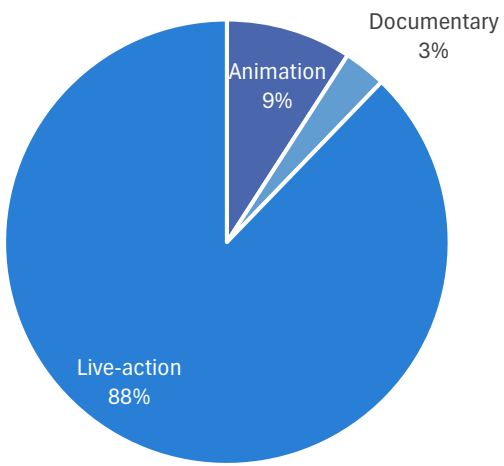
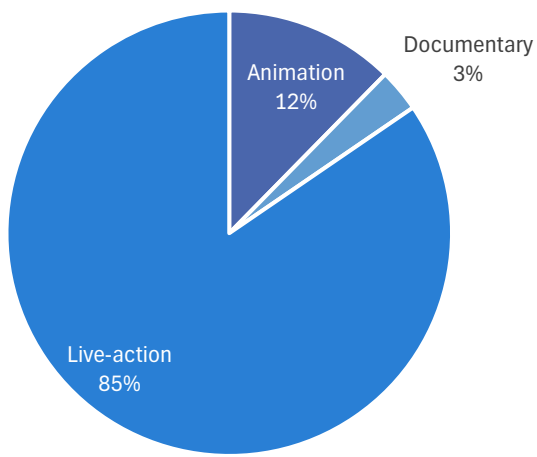
Viewing time is dominated by live-action* and fiction* TV

- Live-action films and TV series is the most watched formats by European viewers, with live-action films accounting for 88% of total viewing time (and live-action films accounting for 85% of films in SVOD catalogues and fiction TV accounting for 80% of TV viewing time but only 66% of TV series in catalogues).
- Documentaries, on the other hand, account for 3% of film viewing (and 12% of all films in SVOD catalogues) and 3% of TV season viewing (and 13% of all TV seasons in catalogues).
- The share of animated films in film viewing (9% of total viewing time) is higher than the share of animated films in catalogues (8%). For animated TV series, the share of total viewing time (12%) is well below the share of animated TV series in SVOD catalogues (21%).

Films - Split of viewing time by format
In % of total viewing time in hours, EU9, 2025



TV seasons - Split of viewing time by format
In % of total viewing time in hours, EU9, 2025



Source: OBS based on Digital i data

*Titles that were neither classified as 'Animation' nor 'Documentary'.

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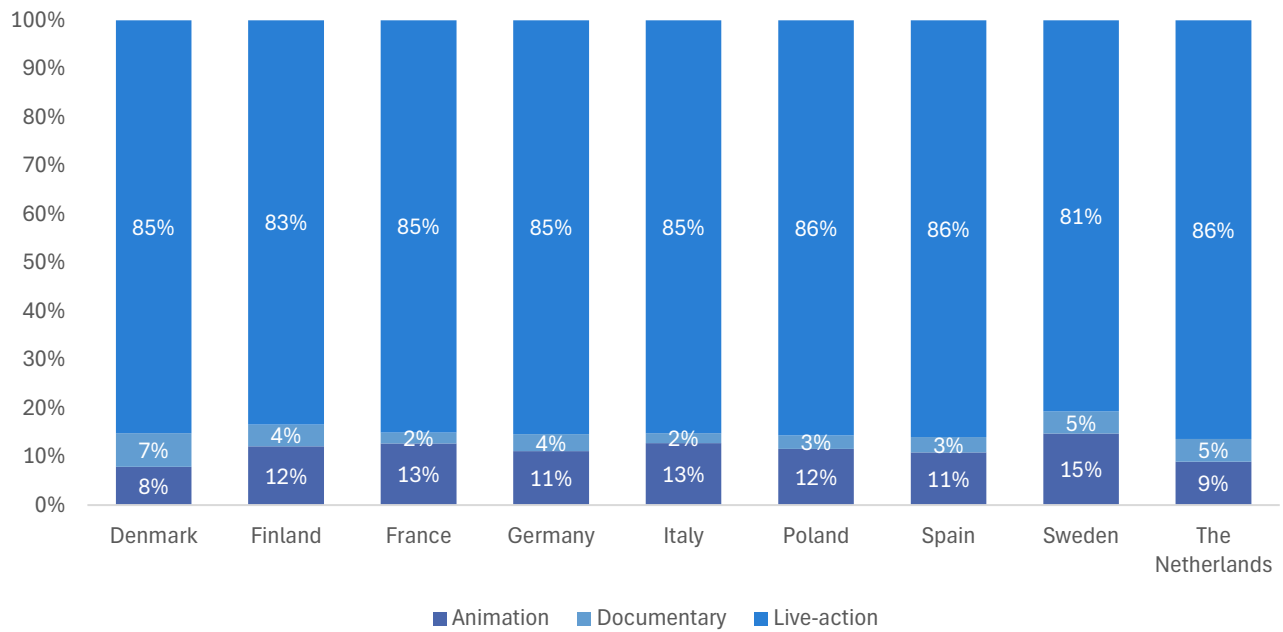
Live-action* content account for between 83% and 86% of viewing time across countries

- The nine countries surveyed have roughly the same level of consumption in terms of formats, with live-action films and TV fiction dominating.
- Animation is the second most consumed format, with consumption ranging from 8% (DK) to 15% (SE) in the nine EU countries.
- Documentaries account for a similar variation of total viewing time, ranging from 2% (IT, FR) to 7% (DK) across countries.

Split of viewing time by country of service and by genre
In % of total viewing time in hours, EU9, 2025



Source: OBS based on Digital i data

*Titles that were neither classified as 'Animation' nor 'Documentary'.

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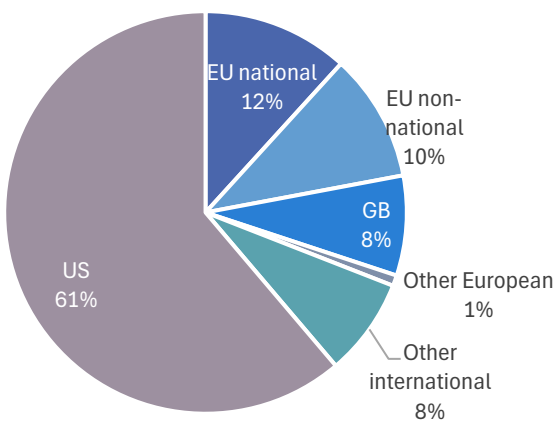
Live action – EU films national get more shares than EU TV seasons national

- Both for films and TV series, EU viewers watch more national films and TV series than EU non-national, on average in the EU 9.
- For live-action films, European films account for 31% of total viewing time, US live-action films for 61% of total viewing time and other international films make up 8% of total viewing time.
- Live-action European TV seasons make up 24% of total viewing time and US TV series account for 63% of total viewing time.

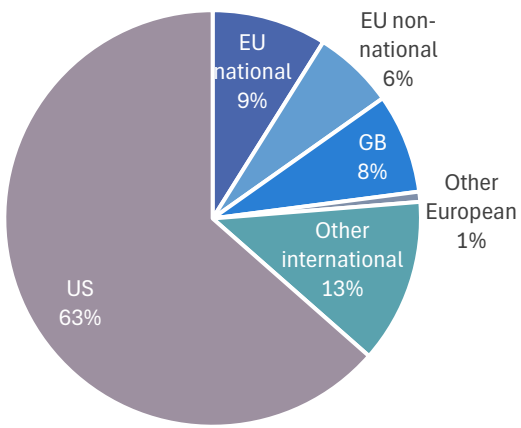
Films - Live action - Split of viewing time by origin
In % of total viewing time in hours, EU9, 2025



Share of total viewing time of European works:

Films 31%
TV seasons 24%

TV seasons – Live-action* - Split of viewing time by origin
In % of total viewing time in hours, EU9, 2025



Source: OBS based on Digital i data

*Titles that were neither classified as 'Animation' nor 'Documentary'.

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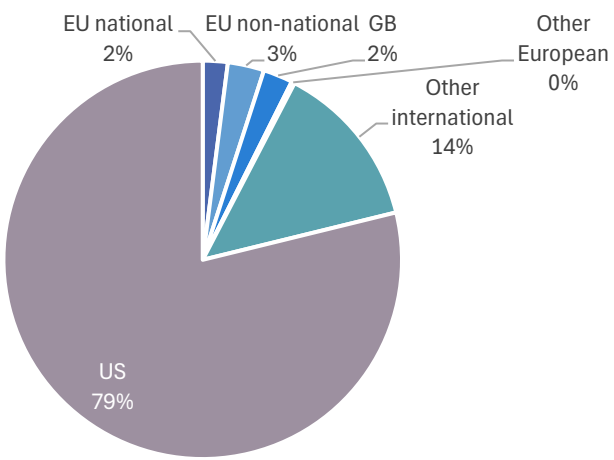
Animation – Other international account for a significant share of viewing time in TV seasons

- International animation account for 34% of viewing of animation TV seasons, thanks to the success of Japanese anime series and the Australian cartoon for children *Bluey*.
- When it comes to films, US animated works dominate, accounting for 79% of viewing time for animation films.
- European animation films account for only 8% of viewing time; for TV seasons, European animation TV seasons account for 12% of viewing time.

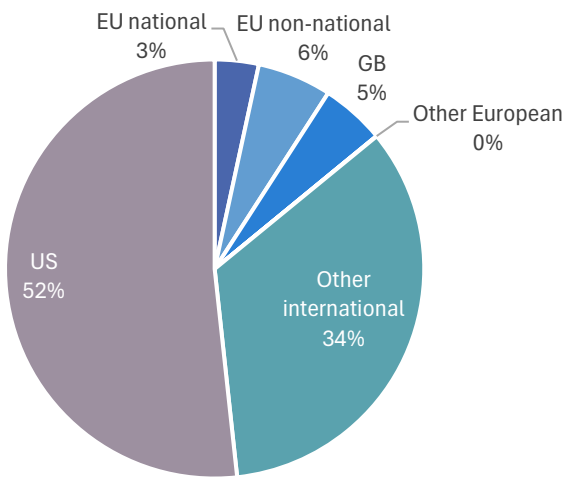
Films – Animation - Split of viewing time by origin
In % of total viewing time in hours, EU9, 2025



Share of total viewing time of European works:

Films 8%
TV seasons 14%

TV seasons - Animation- Split of viewing time by origin
In % of total viewing time in hours, EU9, 2025



Source: OBS based on Digital i data

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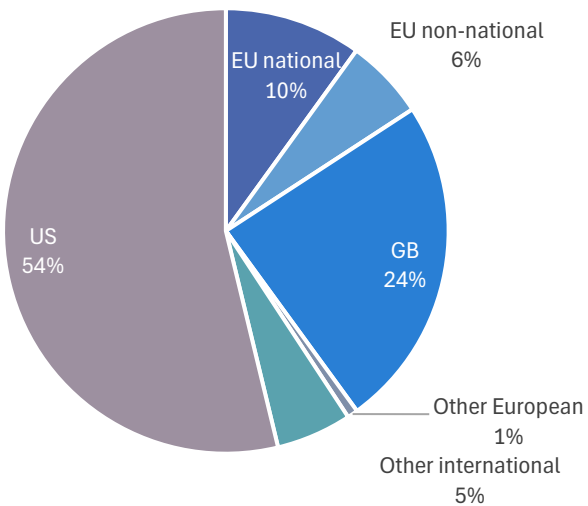
Documentaries – A higher share of viewing time than other format for European works

- European viewers prefer mainly to watch European documentary films with 44% of total documentary viewing time. British documentary films account for 24% of documentary film viewing time, followed by national documentary films with 10%.
- When it comes to TV documentaries, US documentaries account for 59% of total documentary TV viewing time, followed by European documentary TV seasons with 37% of viewing time. Notably, for European documentary TV seasons, viewers watch more GB documentaries with 19% of total viewing time than EU documentaries.

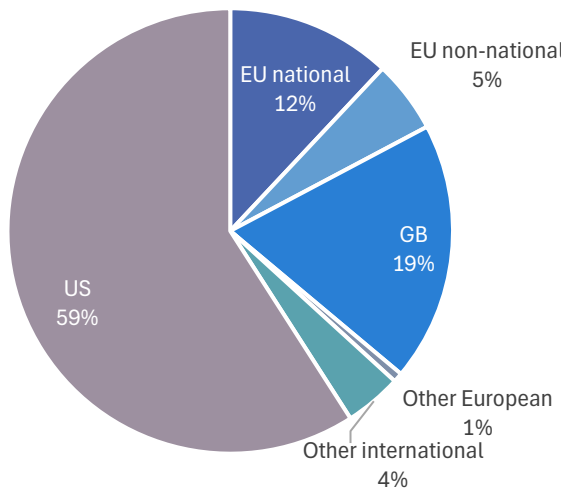
Films – Documentary - Split of viewing time by origin
In % of total viewing time in hours, EU9, 2025



Share of total viewing time of European works:

Films 41%
TV seasons 37%

TV seasons - Documentary - Split of viewing time by origin
In % of total viewing time in hours, EU9, 2025



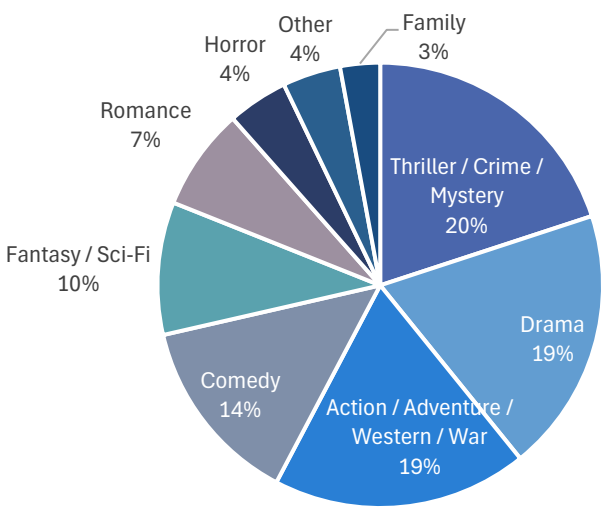
Source: OBS based on Digital i data

European Audiovisual Observatory

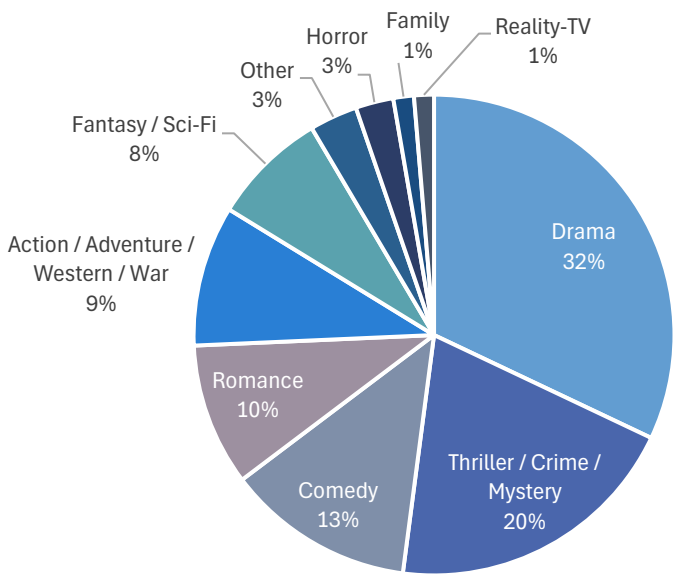
Viewing time by genre shows a variety of usage in live-action content

- Thriller is the leading genre for films (20%), whereas drama (32%) is the genre with the biggest share of viewing time for TV seasons.
- Action, thriller, drama and comedy are the four genres with the biggest share of viewing time for films and TV seasons.

All films - Split of viewing time by genre
In % of total viewing time in hours, live-action, EU9, 2025



All TV seasons - Split of viewing time by genre
In % of total viewing time in hours, live-action, EU9, 2025



Source: OBS based on Digital i data

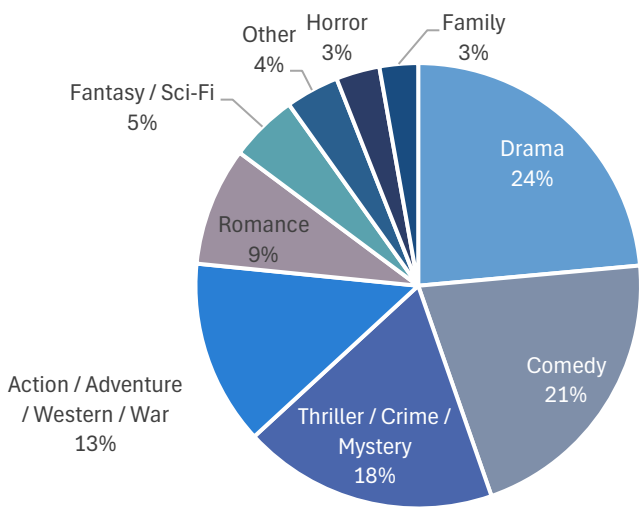
*Works are counted more than once as they have several genres. This is an approximation.

European Audiovisual Observatory

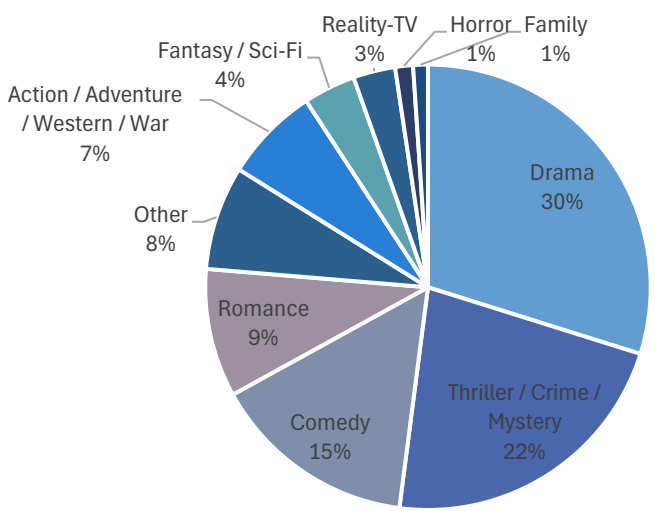
EU27 content viewing time dominated by drama

- Four genres account for ¾ of films and TV seasons viewing time.
- The leading genres for films are drama and comedy, with 24% and 21% respectively.
- The comedy genre accounts for a larger share of film consumption for EU27 compared to the sample average.
- Drama is the genre with the largest share of viewing time for TV seasons, accounting for 30% of viewing time, followed by thriller (22%).

EU27 Films - Split of viewing time by genre
In % of total viewing time in hours, live-action, EU9, 2025



EU 27 TV seasons - Split of viewing time by genre
In % of total viewing time in hours, live-action, EU9, 2025



Source: OBS based on Digital i data

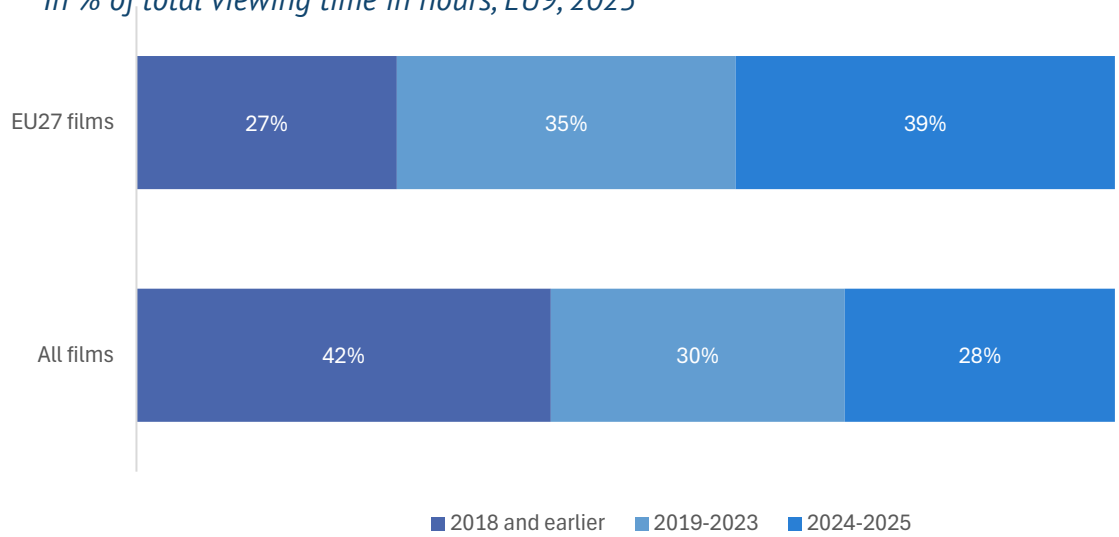
*Works are counted more than once as they have several genres. This is an approximation.

European Audiovisual Observatory

Recent films account for more than 2/3 of the viewing time of EU27 titles

- Viewers prefer to watch more recent films. Films produced in 2024 and 2025 account for 28% of total viewing time.
- For EU27 films, this trend is even more pronounced, with recent EU27 films accounting for 39% of all EU27 film viewing time.
- Films produced in 2018 or before account for 42% of total viewing time and only 27% of EU27 titles viewing time.

Films - Split of viewing time by origin and by year of production
In % of total viewing time in hours, EU9, 2025



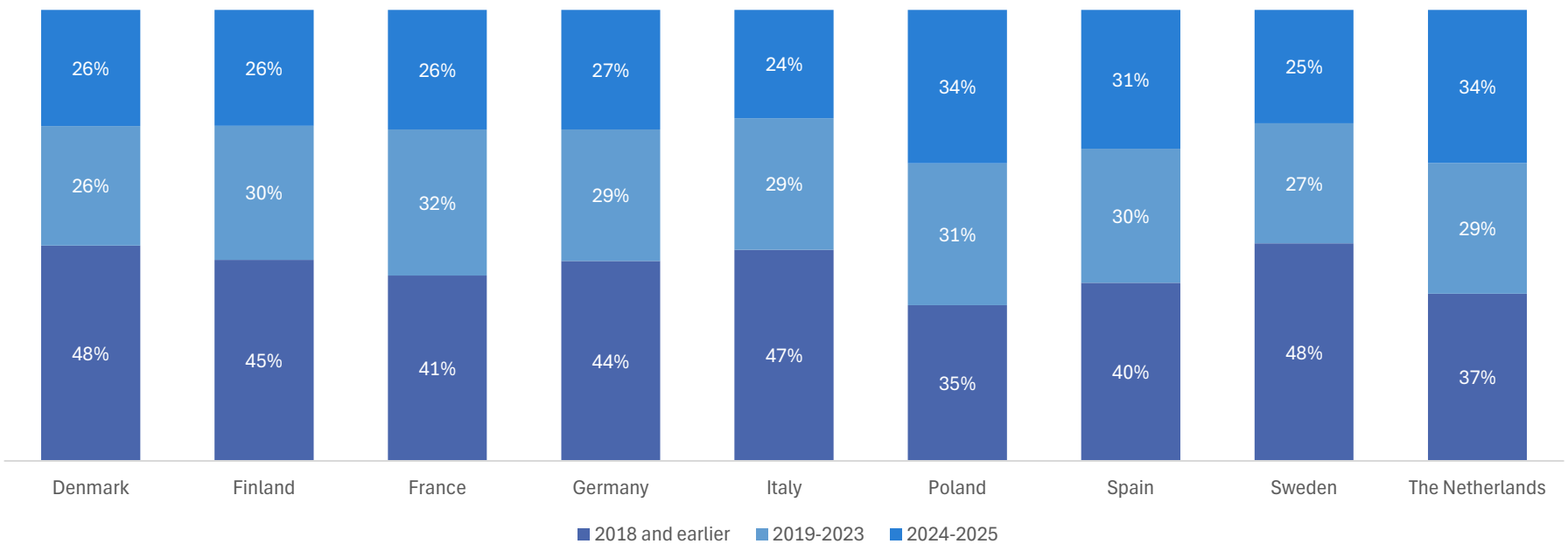
Source: OBS based on Digital i data

European Audiovisual Observatory

Recently produced titles get between 24% and 34% of viewing time in the EU9

- In the Netherlands and Poland recent films of all origins get the most viewing time (34%).
- Catalogue films produced in 2018 or before are more popular in Denmark and Sweden than in the rest of the sample.

Films all origins - Split of viewing time by year of production
In % of total viewing time in hours, EU9, 2025



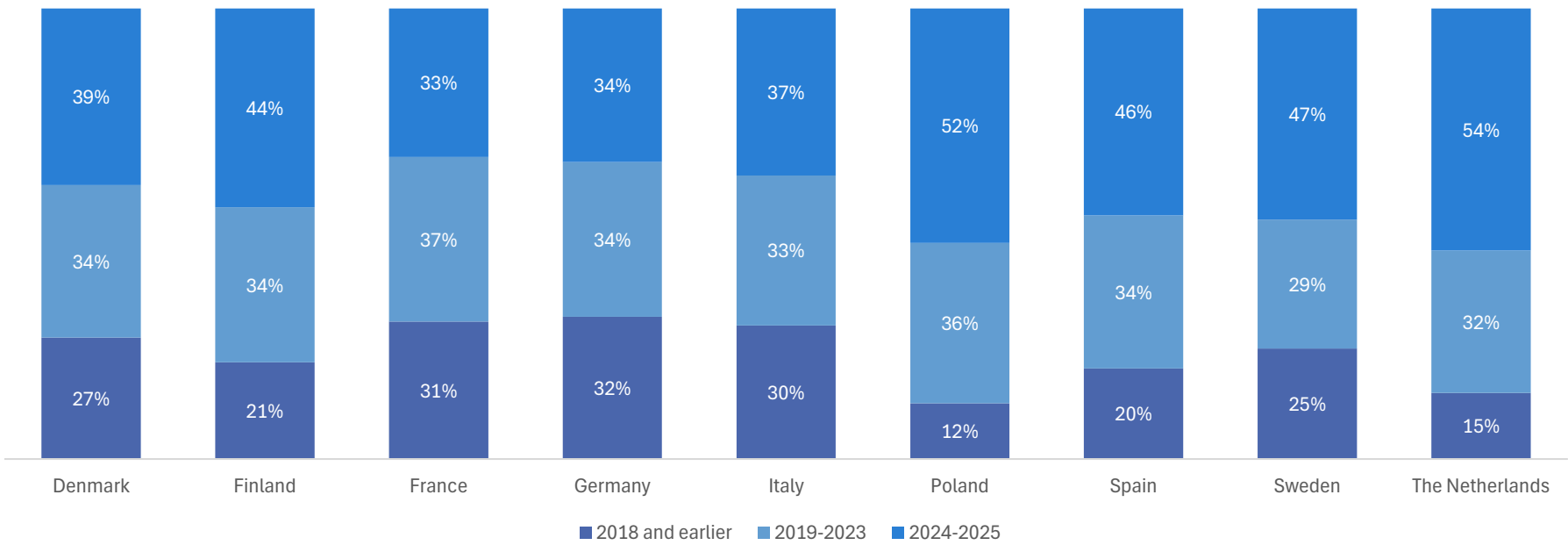
Source: OBS based on Digital i

European Audiovisual Observatory

The gap between new and old titles is wider for EU27 titles

- It is in the Netherlands that recent EU27 films get the most viewing time (54%).
- Viewers from Germany, France and Italy tend to watch more older films than the rest of the sample.

Films EU27 - Split of viewing time by year of production
In % of total viewing time in hours, EU9, 2025



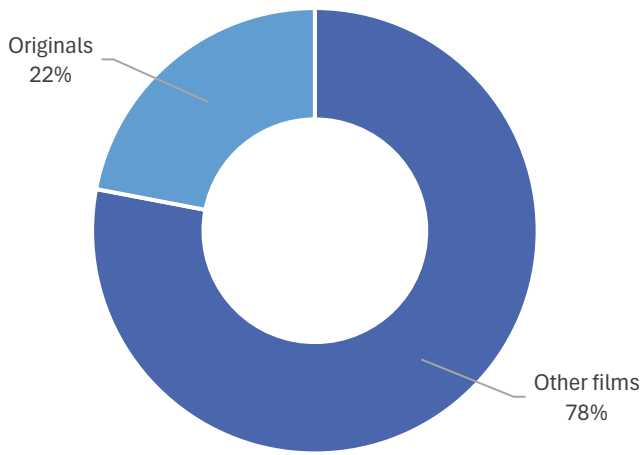
Source: OBS based on Digital i

European Audiovisual Observatory

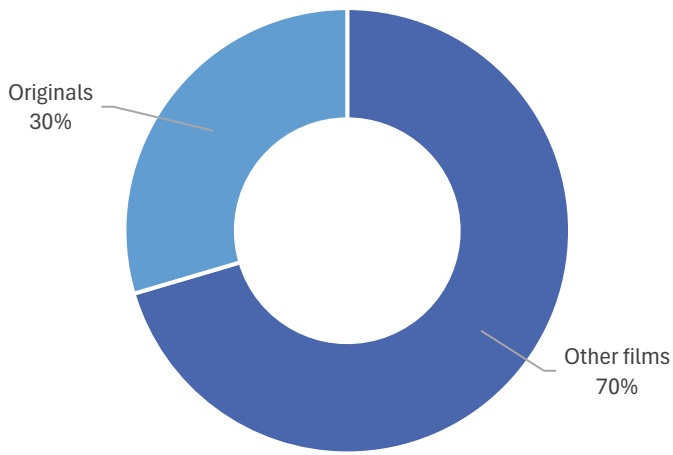
Original films account for 22% of all film viewing time but up to 30% of EU27 viewing time

- Original films account for 22% of all film viewing time and original EU27 films account for 30% of all EU27 film viewing time.

Split of viewing time all films - original and non-original films
In % of total viewing time in hours, EU9, 2025



Split of viewing time EU27 films - original and non-original films
In % of total viewing time in hours, EU9, 2025



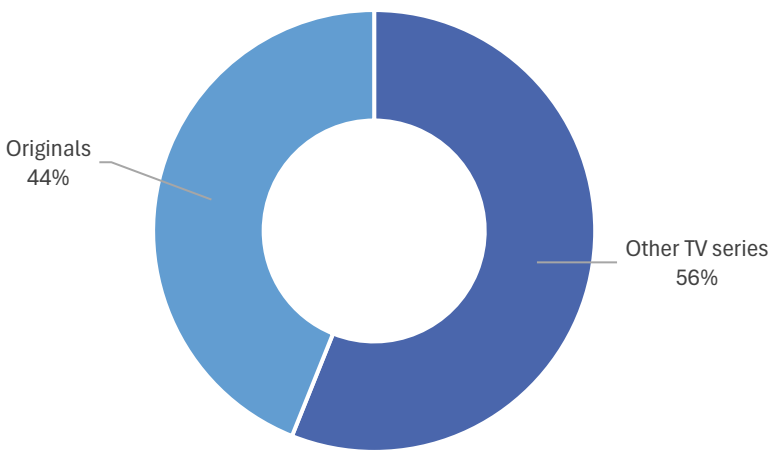
Source: OBS based on Digital i data

European Audiovisual Observatory

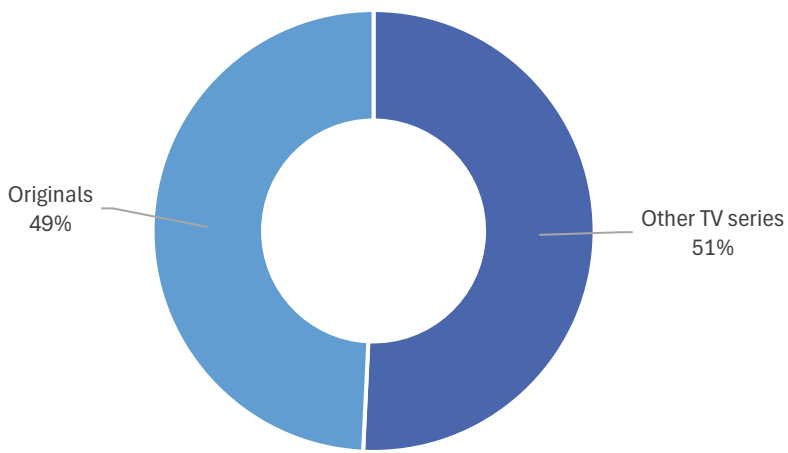
Original EU27 TV seasons account for almost half of EU27 TV seasons viewing

- Original TV seasons get a bigger share of viewing time than original films with more original TV seasons being produced and promoted by SVOD services.
- Original films account for 44% of all film viewing time and original EU27 films account for 49% of all EU27 film viewing time.

Split of viewing time all TV seasons – original vs non-original TV series
In % of total viewing time in hours, EU9, 2025



Split of viewing time EU27 TV seasons – original vs non-original TV series
In % of total viewing time in hours, EU9, 2025



Source: OBS based on Digital i data

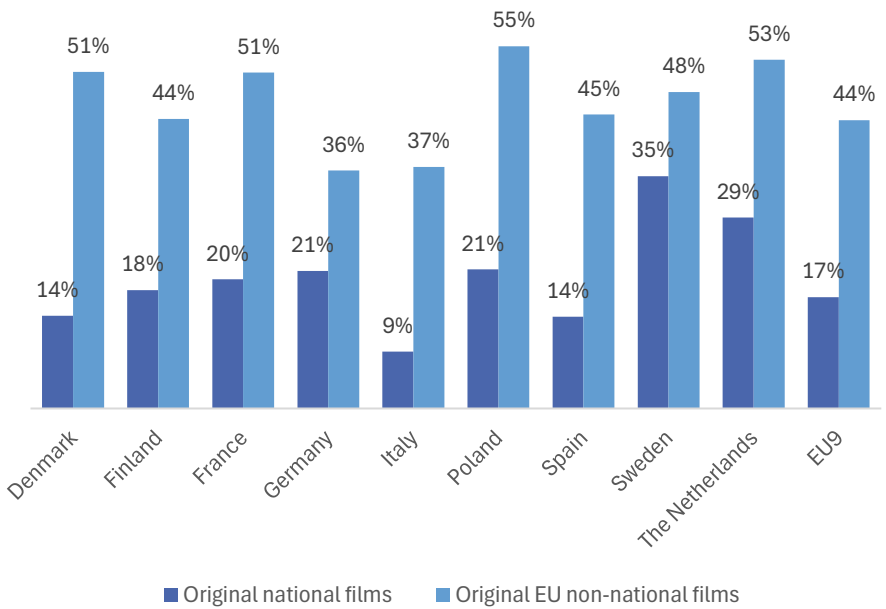
European Audiovisual Observatory

Most of the viewing time for EU non-national TV seasons is generated through originals

- For national and non-national films, most of the viewing time is attributable to non-original films.
- On average in the EU9, EU non-national original TV seasons account for 62% of EU non-national TV viewing time, showing that for TV seasons, streaming originals such as *The Åre Murders* or *Secrets We Keep* account for most of the EU non-national viewing time by subscribers, which could also be a consequence of more promotion of SVOD originals on SVOD homepages.
- On the other hand, national originals account for 38% of national TV viewing time on average in the EU9.

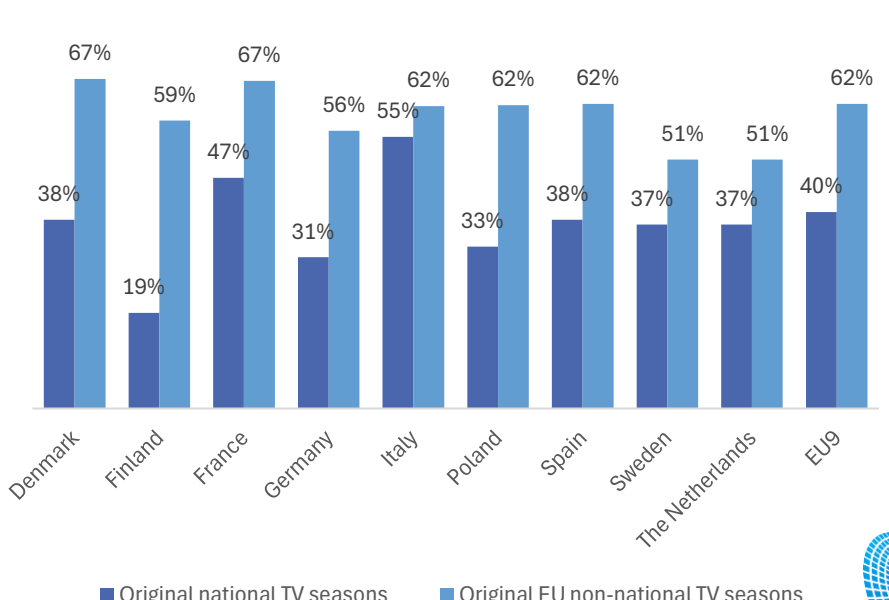
Share of viewing time – National and EU non-national original films

In % of national and non-national viewing time, by country, 2025



Share of viewing time – National and EU non-national original TV seasons

In % of national and non-national viewing time, by country, 2025



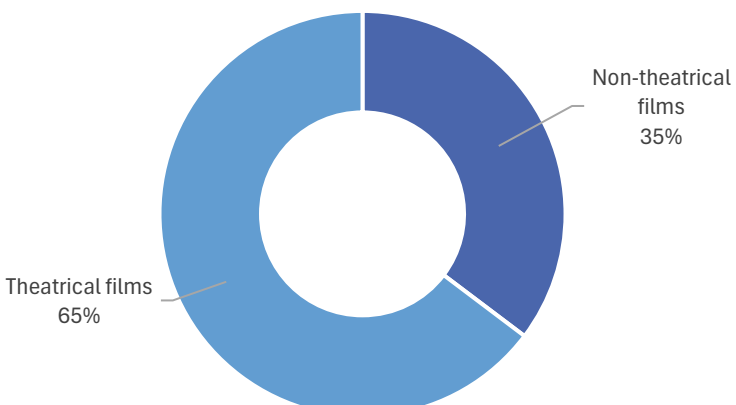
Source: OBS based on Digital i data

European Audiovisual Observatory

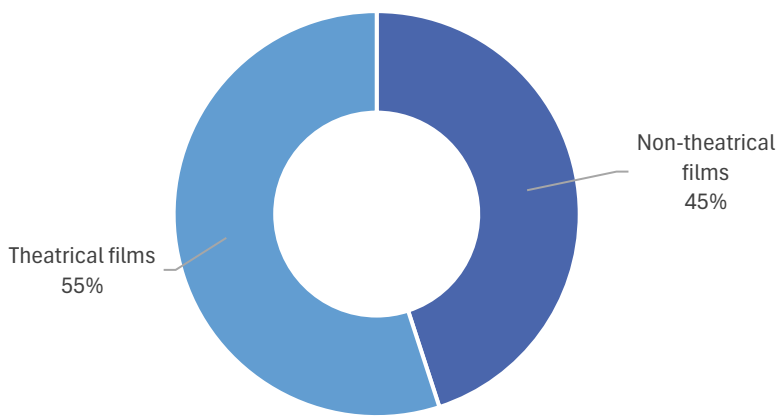
Theatrical films dominate viewing time for films of all origins and EU27 films

- Films released in cinemas account for the majority of viewing time with 65% and 55% of viewing time for all films and EU27 films respectively, as films released in cinemas are better known by audiences.
- Nevertheless, only 3 of the top 10 most watched films were released in cinemas which may be related to a more intensive promotion on the homepages of original streaming services.

Split of viewing time all films - Theatrical and non-theatrical films
In % of total viewing time in hours, films produced in 1995 or after with at least 1 000 admissions, EU9, 2025



Split of viewing time EU27 films - Theatrical and non-theatrical films
In % of total viewing time in hours, films produced in 1995 or after with at least 1 000 admissions, EU9, 2025



Source: OBS based on Digital i data

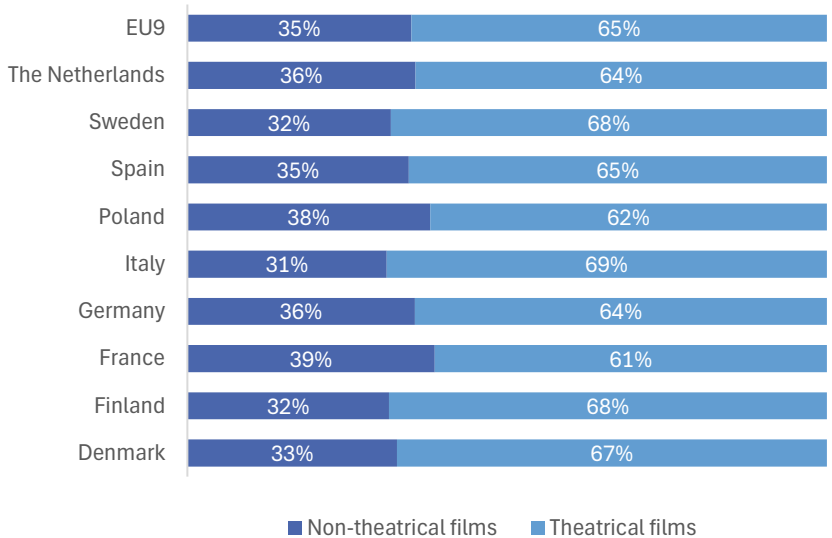
European Audiovisual Observatory

Theatrical film titles generate the majority of viewing time in all countries for all origin films

- Theatrical films receive the majority of viewing time for works of all origins but their share of viewing time is smaller for EU27 titles.
- In Italy, theatrical films of all origins receive the most viewing time (69%).
- Sweden, Poland, Finland and the Netherlands are the countries where EU27 non-theatrical films receive more viewing time than theatrical films.

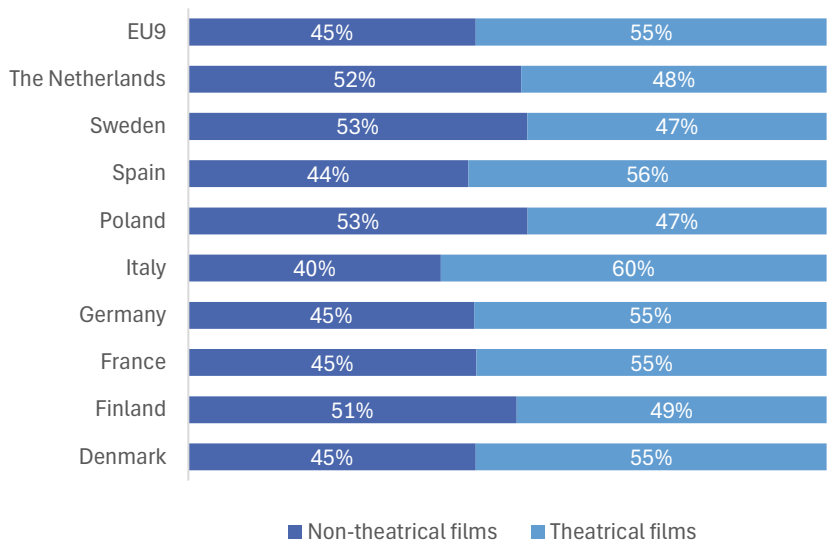
Share of viewing time all origins films – Theatrical and non-theatrical films

In % of total viewing time in hours, films produced in 1995 or after with at least 1 000 admissions, by country, 2025



Share of viewing time EU27 films – Theatrical and non-theatrical films

In % of total viewing time in hours, films produced in 1995 or after with at least 1 000 admissions, by country, 2025



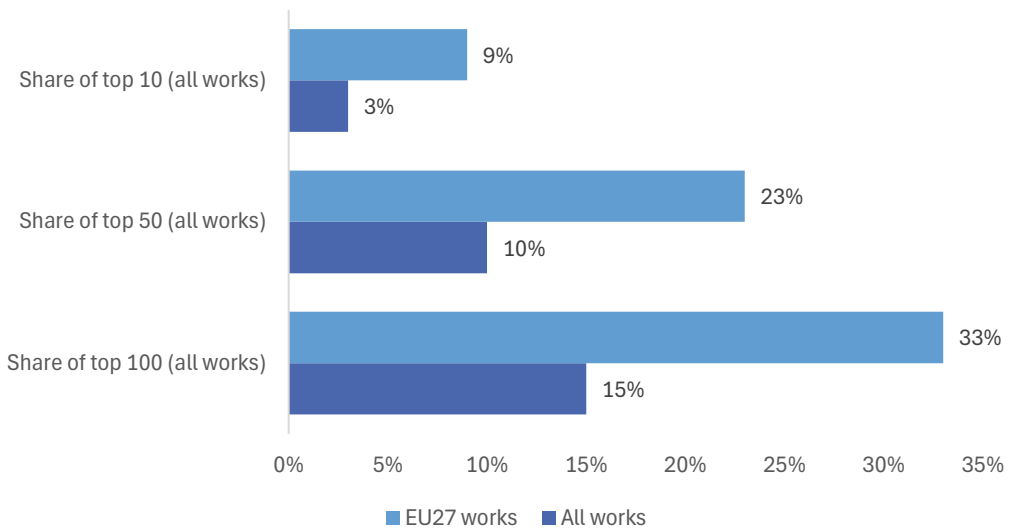
Source: OBS based on Digital i data

European Audiovisual Observatory

Concentration – Viewing time is more concentrated for EU27 works

- EU27 works viewing time is more concentrated than works of all origins.
- Ten works account for 3% of the total viewing time, but the ten most-watched EU27 works represent 9% of all EU27 viewing time.

All works - Share of viewing time of the most watched works
In % of total viewing time in hours, EU9, 2025



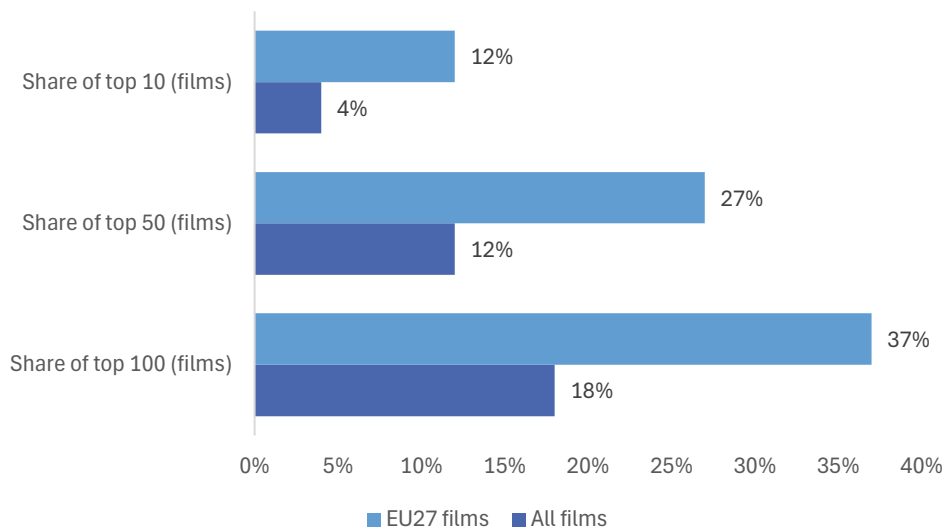
Source: OBS based on Digital i data

European Audiovisual Observatory

Concentration of films – the top 100 EU27 films account for 37% of EU27 film viewing time

- The viewing time of EU27 films is more concentrated than that of films of all origins.
- One hundred works account for 18% of the total viewing time, and for 37% of EU27 viewing time.
- The hundred most-watched films account for 18% of the total viewing time, but the hundred most-watched EU27 films represent 37% of all EU27 viewing time.

Films - Share of viewing time of the most watched films
In % of total viewing time in hours, EU9, 2025



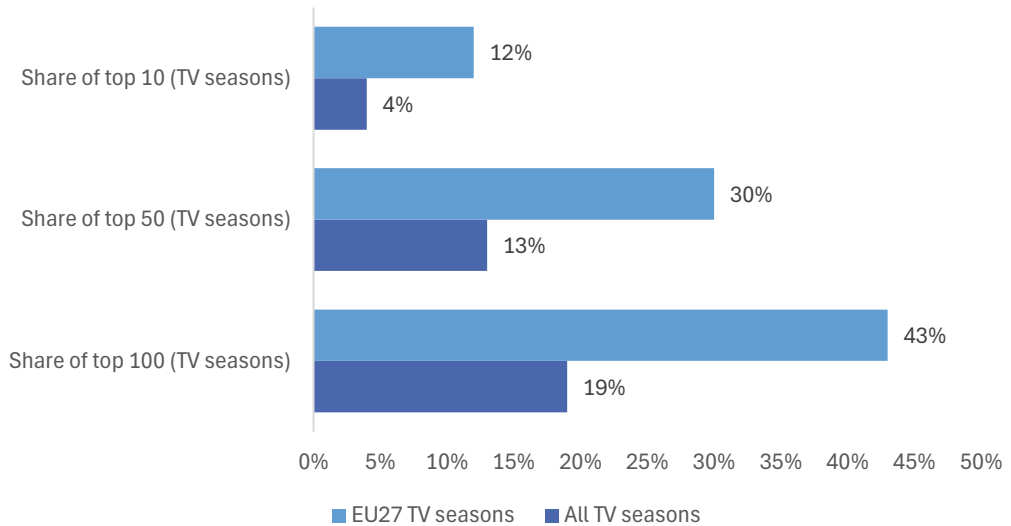
Source: OBS based on Digital i data

European Audiovisual Observatory

Concentration of TV – the top 100 EU27 TV seasons account for 43% of EU27 viewing time

- The top 100 TV seasons account for 19% of viewing time for all TV seasons, while the top 100 EU27 TV seasons account for 43% of viewing time for EU27 TV seasons.

TV seasons - Share of viewing time of the most watched films
In % of total viewing time in hours, EU9, 2025



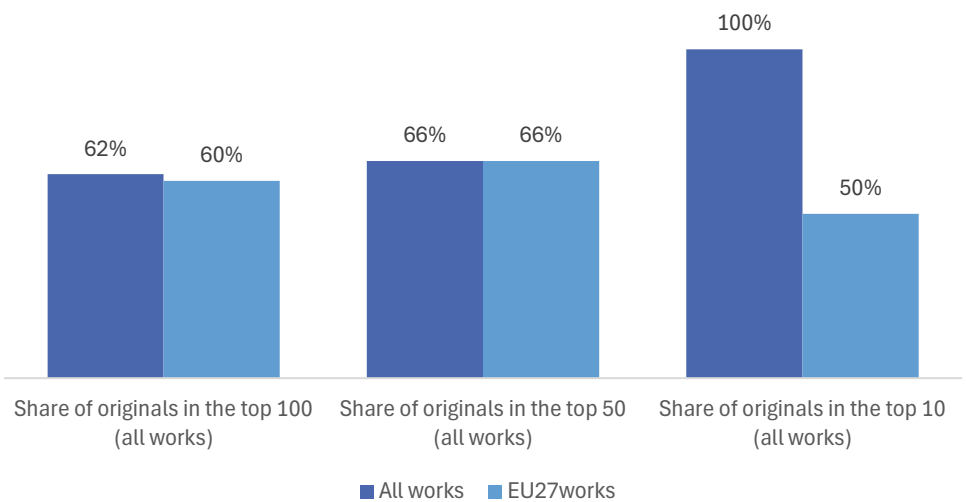
Source: OBS based on Digital i data

European Audiovisual Observatory

Originals – Originals dominate the top lists of most-viewed works

- Original works dominate the list of most-viewed content on SVOD services in the EU9.
- In the top 100 works most watched works, originals account for 62% of works of all origins, while the top 10 works are even more dominated by originals: with 10 out of the top 10 most watched works are original streaming productions with titles such as *Wednesday, Squid Game* or *Adolescence*.

All works - Share of originals of the most watched works
In % of all works, EU9, 2025



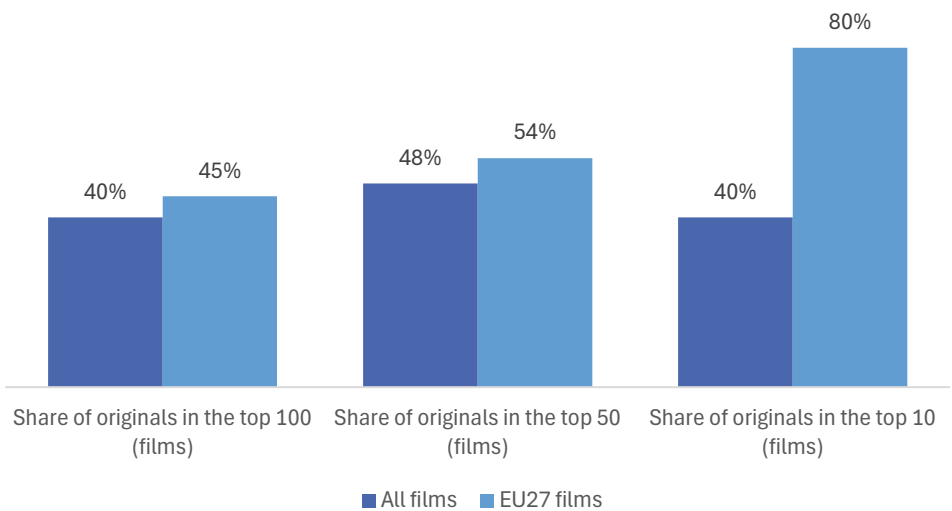
Source: OBS based on Digital i data

European Audiovisual Observatory

Originals – More original films in the EU27 top list

- Original films are more represented in the top EU27 films than in the top films of all origins.
- In the top 100 most watched films, originals represent 40% of films from all origins and 45% of EU27 films.
- One possible reason for this is that SVOD services tend to promote original content on their homepages.

Films - Share of originals of the most watched films
In % of original films, EU9, 2025



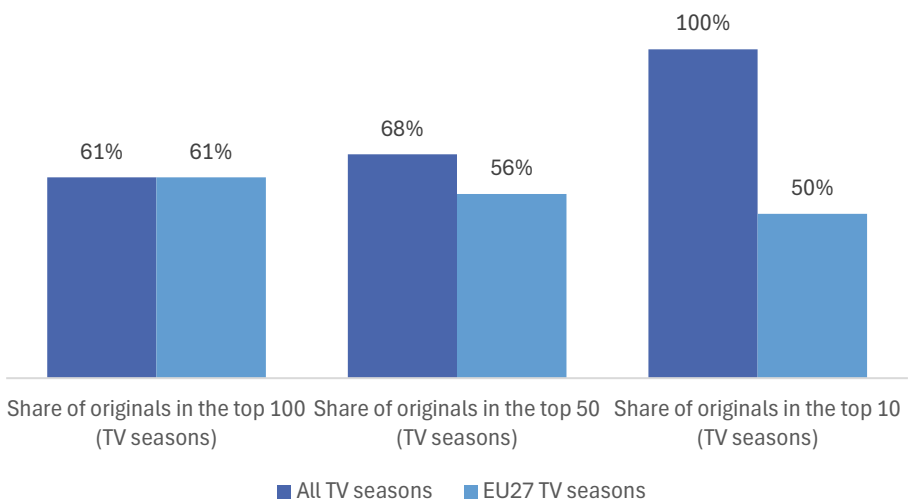
Source: OBS based on Digital i data

European Audiovisual Observatory

Originals – Original TV seasons comprise the majority of the most-watched TV seasons

- In the top 100 most-watched TV programmes, originals account for 61% of the titles for all origins and EU27 originals.

TV seasons - Share of originals of the most watched TV seasons
In % of original TV seasons, EU9, 2025



Source: OBS based on Digital i data

European Audiovisual Observatory

Concentration – All works top lists

All works – Top 10 all regions of origin

In total viewing time in minutes, EU9, 2025

Rank	Original title	Year	First production country	Region	Type	Original
1	Wednesday S2	2022	United States	US	series	yes
2	Squid Game S2	2021	South Korea	Other international	series	yes
3	Squid Game S3	2021	South Korea	Other international	series	yes
4	Ginny & Georgia S3	2021	United States	US	series	yes
5	Adolescence S1	2025	United Kingdom	GB	series	yes
6	The Night Agent S2	2023	United States	US	series	yes
7	The Summer I Turned Pretty S3	2022	United States	US	series	yes
8	You S5	2018	United States	US	series	yes
9	Department Q S1	2025	United Kingdom	GB	series	yes
10	Untamed S1	2025	United States	US	series	yes

All works – Top 10 EU27

In total viewing time in minutes, EU9, 2025

Rank	Original title	Year	First production country	Region	Type	Original
1	Billionaires' Bunker S1	2025	Spain	EU27	series	no
2	Cassandra S1	2025	Germany	EU27	series	no
3	Olympo S1	2025	Spain	EU27	series	yes
4	El jardinero S1	2025	Spain	EU27	series	no
5	Valle Salvaje S1	2024	Spain	EU27	series	no
6	Åremorden S1	2025	Sweden	EU27	series	yes
7	Reservatet S1	2025	Denmark	EU27	series	yes
8	Manual para señoritas S1	2025	Spain	EU27	series	yes
9	Glaskupan S1	2025	Sweden	EU27	series	yes
10	Ángela S1	2024	Spain	EU27	series	no

Source: OBS based on Digital i data

European Audiovisual Observatory

Concentration – Films top lists

Films– Top 10 all regions of origin

In total viewing time in minutes, EU9

Rank	Original title	Year	First production country	Region	Original
1	KPop Demon Hunters	2025	United States	US	no
2	Back in Action	2024	United States	US	yes
3	The Life List	2025	United States	US	yes
4	The Thursday Murder Club	2025	United States	US	no
5	The Electric State	2025	United States	US	yes
6	A Working Man	2025	United Kingdom	GB	no
7	The Accountant 2	2025	United States	US	no
8	La viuda negra	2025	Spain	EU27	no
9	Heads of State	2025	United States	US	yes
10	My Oxford Year	2025	United States	US	no

Films– Top 10 EU27

In total viewing time in minutes, EU9, 2025

Rank	Original title	Year	First production country	Region	Original
1	La viuda negra	2025	Spain	EU27	no
2	Exterritorial	2025	Germany	EU27	yes
3	Ad Vitam	2025	France	EU27	yes
4	The Old Guard 2	2025	Italy	EU27	yes
5	Culpa tuya	2024	Spain	EU27	yes
6	iHostage	2025	Netherlands	EU27	yes
7	French Lover	2025	France	EU27	yes
8	Fall for me	2025	Germany	EU27	yes
9	Culpa mía	2023	Spain	EU27	yes
10	Bastion 36	2025	France	EU27	no

Source: OBS based on Digital i data

Concentration – TV seasons top lists

TV seasons – Top 10 all regions of origin

In total viewing time in minutes, EU9

Rank	Original title	Year	First production country	Region	Type	Original
1	Wednesday S2	2022	United States	US	series	yes
2	Squid Game S2	2021	South Korea	Other international	series	yes
3	Squid Game S3	2021	South Korea	Other international	series	yes
4	Ginny & Georgia S3	2021	United States	US	series	yes
5	Adolescence S1	2025	United Kingdom	GB	series	yes
6	The Night Agent S2	2023	United States	US	series	yes
7	The Summer I Turned Pretty S3	2022	United States	US	series	yes
8	You S5	2018	United States	US	series	yes
9	Department Q S1	2025	United Kingdom	GB	series	yes
10	Untamed S1	2025	United States	US	series	yes

TV seasons – Top 10 EU27

In total viewing time in minutes, EU9, 2025

Rank	Original title	Year	First production country	Region	Original
1	Billionaires' Bunker S1	2025	Spain	EU27	no
2	Cassandra S1	2025	Germany	EU27	no
3	Olympo S1	2025	Spain	EU27	yes
4	El jardinero S1	2025	Spain	EU27	no
5	Valle Salvaje S1	2024	Spain	EU27	no
6	Åremorden S1	2025	Sweden	EU27	yes
7	Reservatet S1	2025	Denmark	EU27	yes
8	Manual para señoritas S1	2025	Spain	EU27	yes
9	Glaskupan S1	2025	Sweden	EU27	yes
10	Ángela S1	2024	Spain	EU27	no

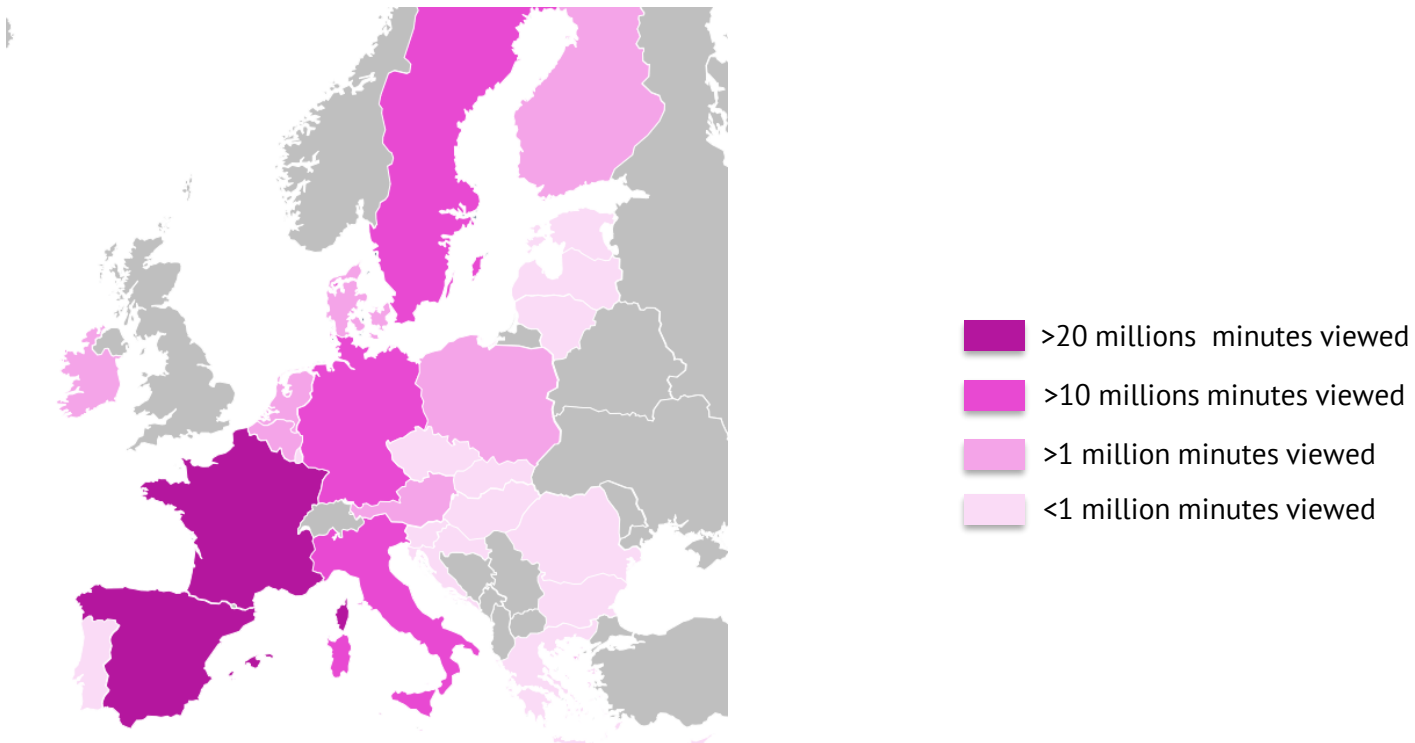
Source: OBS based on Digital i data

Viewing time of exported EU works
The share of viewing time of EU non-national works by production country

European Audiovisual Observatory

Spain and France ahead of EU non-national viewing time by production countries

- In terms of viewing time outside their national market, Spain and France are the two leading exporting countries, followed by Germany, Italy and Sweden at a significant distance.



EU27 non-national works – Viewing time by production country
In total viewing time in minutes, EU9, 2025

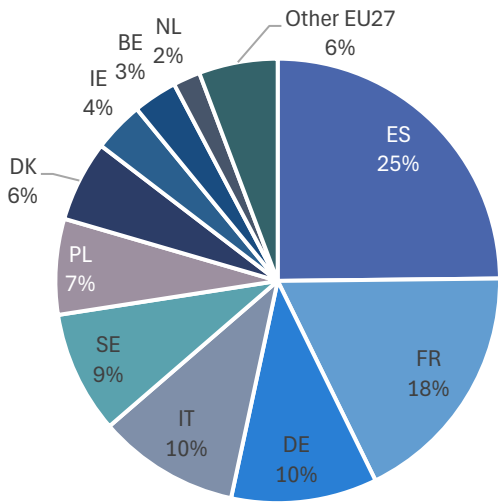
Source: OBS based on Digital i data

European Audiovisual Observatory

Viewing time by production country (EU27) – only EU non-national works

- The top 3 exporting countries account for 53% of film and TV consumption (Spain, France and Germany) and the top 10 account for almost the total viewing time (94%).

Share of viewing time of EU non-national works by EU27 production countries
In % of total viewing time, EU9, 2025

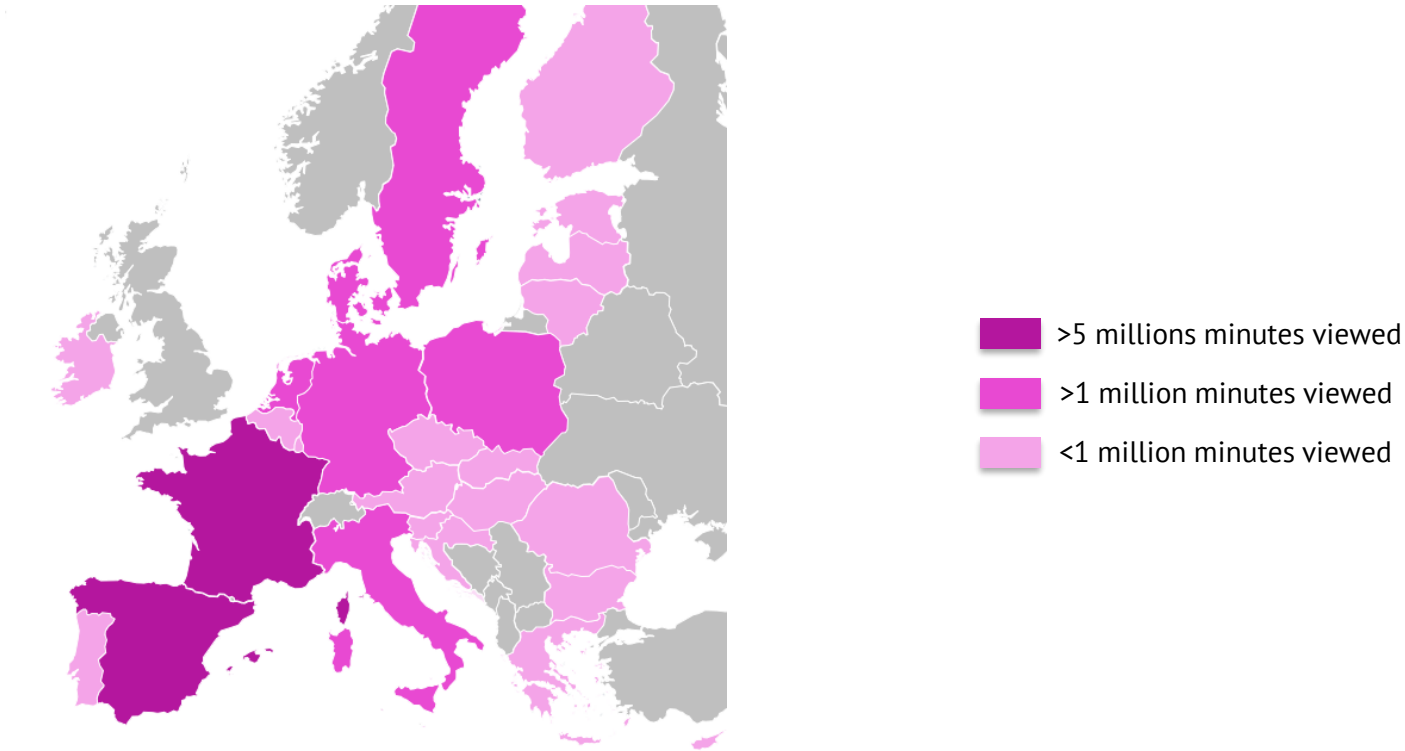


Source: OBS based on Digital i data

European Audiovisual Observatory

Spain and France ahead of EU non-national viewing time by production countries

- The top two exporting countries in terms of viewing time outside their national markets are Spain and France.
- Germany, Poland, Italy, Sweden, the Netherlands and Denmark are medium-sized countries in terms of viewing time outside their domestic markets.



EU27 non-national films – Viewing time by production country
In total viewing time in minutes, EU9, 2025

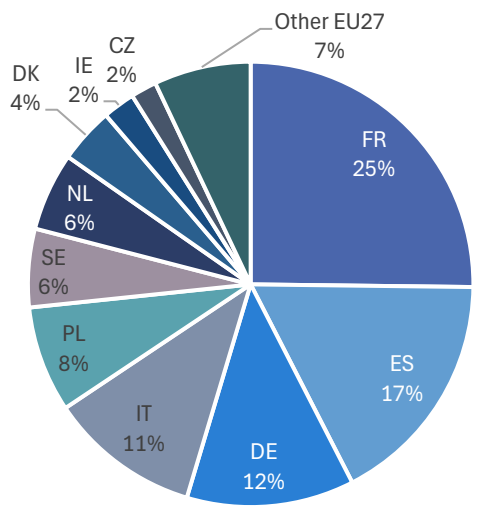
Source: OBS based on Digital i data

European Audiovisual Observatory

Viewing time by production country (EU27) – Films – Only EU non-national works

- The top 3 exporting countries account for 55% of film consumption (Spain, France and Germany) and the top 10 account for almost the total viewing time (93%).

Share of viewing time of EU non-national films by EU27 production countries
In % of total viewing time, EU9, 2025

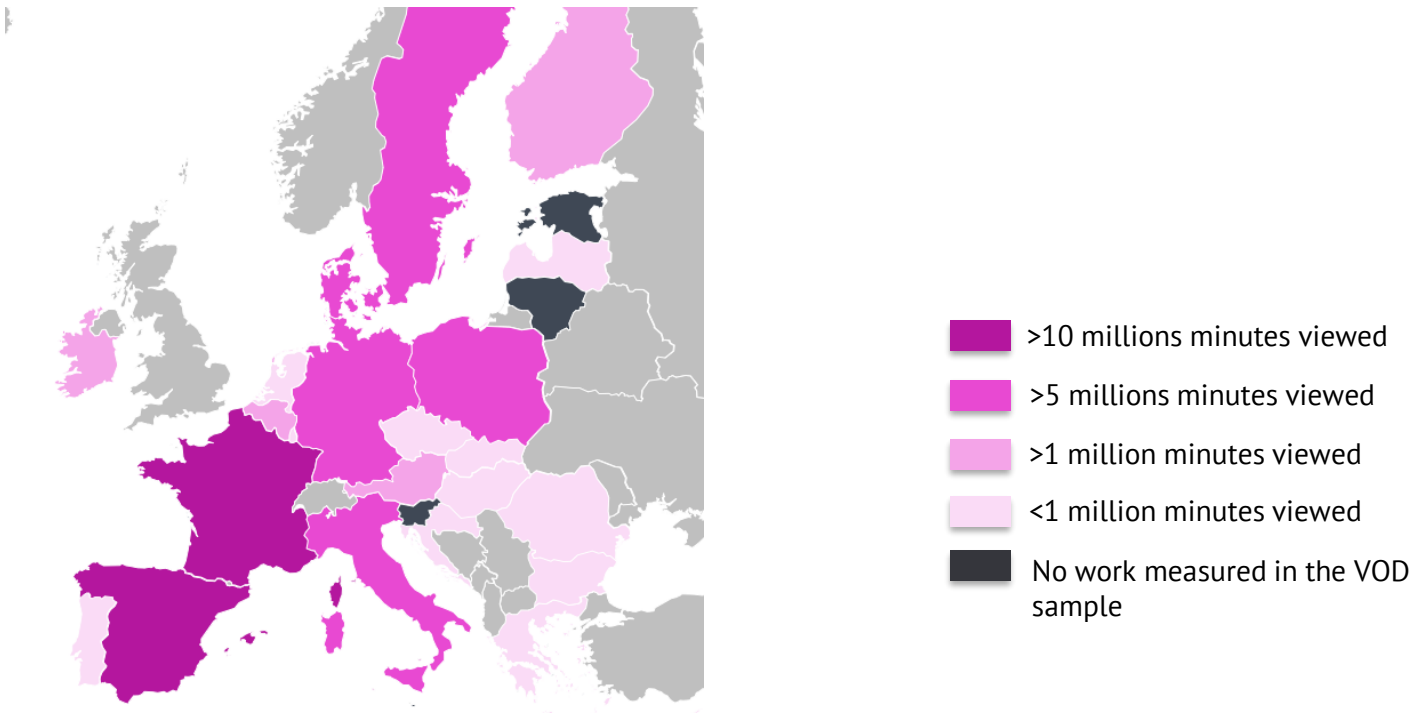


Source: OBS based on Digital i data

European Audiovisual Observatory

Spain and France ahead of EU non-national viewing time by production countries

- The top two exporting countries in terms of viewing time outside their national markets are Spain and France.
- Sweden, Italy, Germany, Denmark and Poland are medium-sized countries in terms of viewing time outside their domestic markets.



EU27 non-national TV seasons – Viewing time by production country
In total viewing time in minutes, EU9, 2025

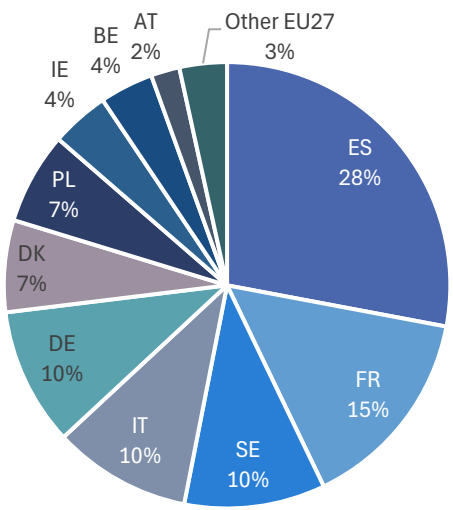
Source: OBS based on Digital i data

European Audiovisual Observatory

Viewing time by production country (EU27) – TV - Only EU non-national works

- The TV seasons consumption shows a similar level of concentration with the top 3 exporting countries accounting for 53% of TV consumption (Spain, France and Sweden) and the top 10 accounting for almost the total viewing time (94%).

Share of viewing time of EU non-national TV seasons by EU27 production countries
In % of total viewing time, EU9, 2025



Source: OBS based on Digital i data

European Audiovisual Observatory

Part 2: The evolution of viewing time*

** Viewing time shares may differ from previous edition for two reasons:*

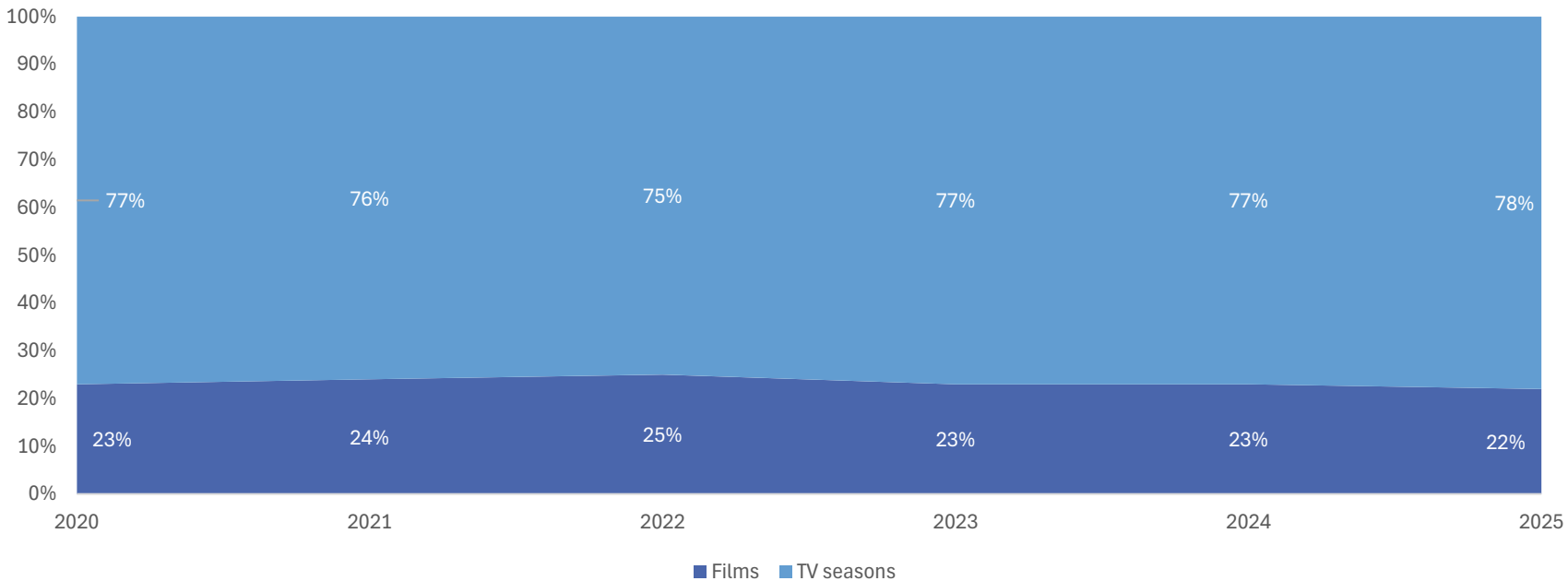
- *A new methodology has been applied to exclude theatrical films from original titles.*
- *2024 data has been recalculated to include October, November and December figures.*

European Audiovisual Observatory

Split between films and TV seasons remains stable

- The distribution of viewing time between films and TV seasons remains stable with TV content accounting for the vast majority.

Evolution of viewing time by content type
In % of total viewing time



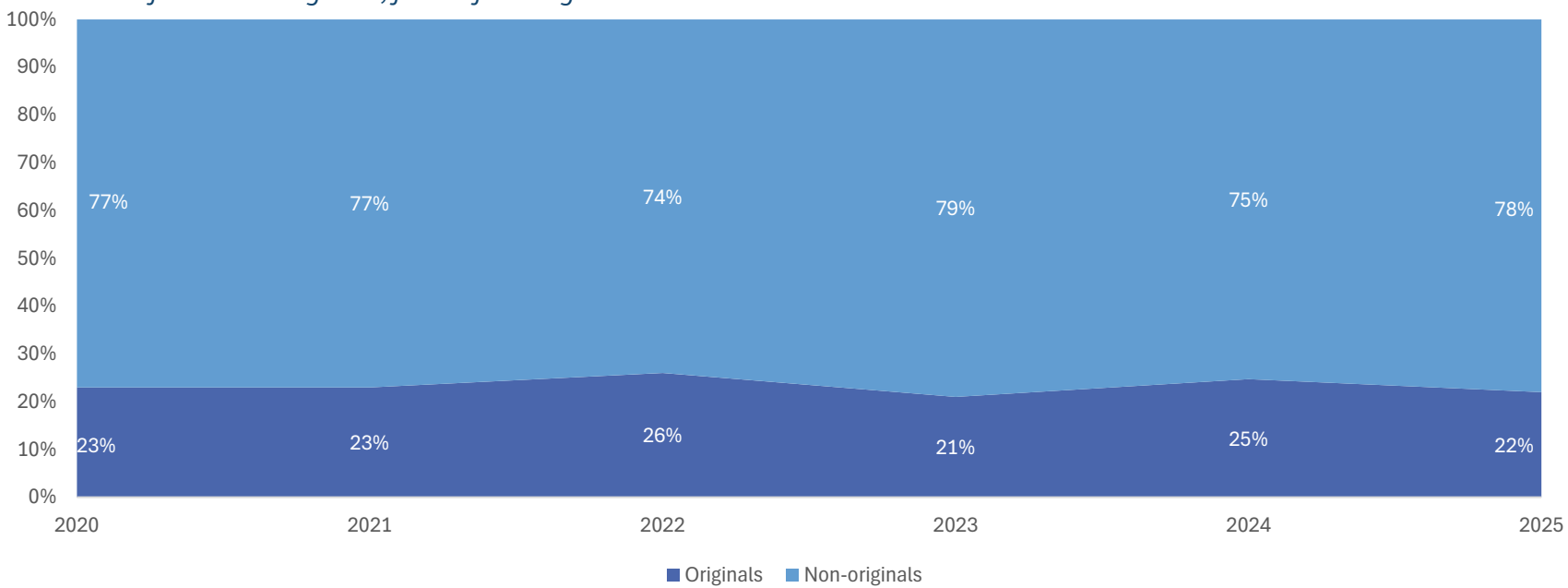
Source: OBS based on Digital i data

European Audiovisual Observatory

Originals – Viewing time originals for all origins films represents less than ¼

- Viewing time for originals peaked in 2022 and then fell to its lowest level in 2025.

Originals vs non-originals - Evolution of viewing time
In % of total viewing time, films of all origins



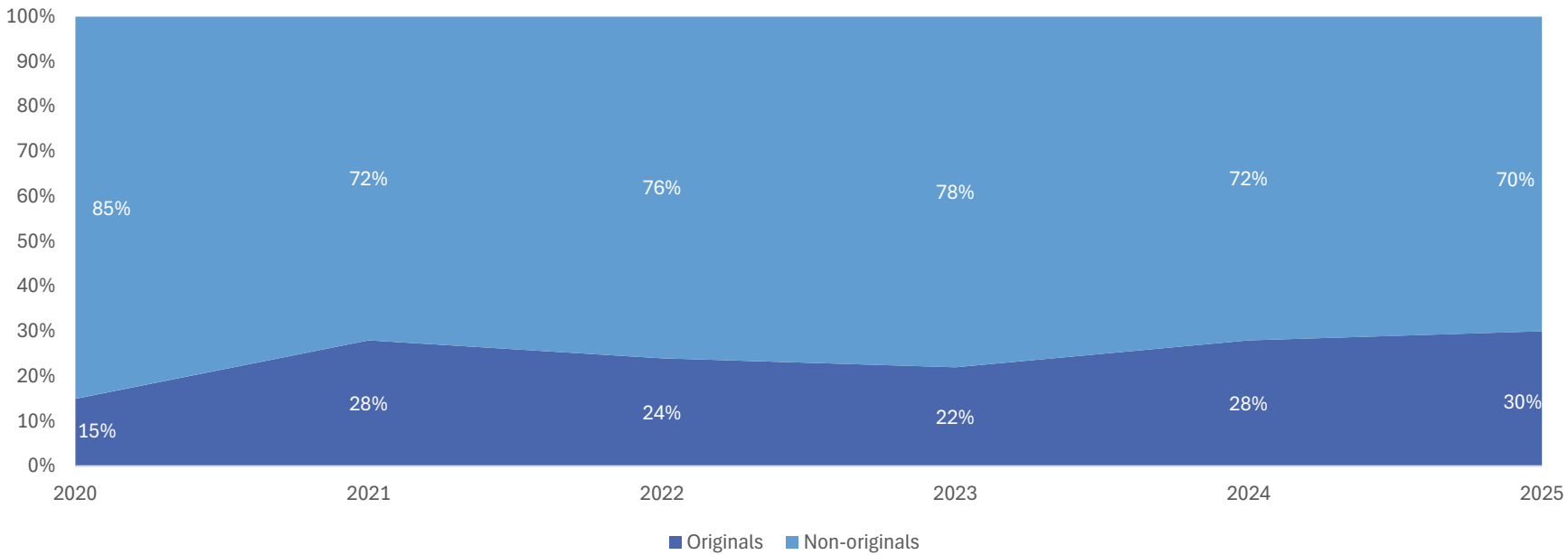
Source: OBS based on Digital i data

European Audiovisual Observatory

Originals – The viewing time share of original EU27 titles increased in 2025

- The viewing time share of original titles increased to 30% in 2025.

Originals vs non-originals - Evolution of viewing time
In % of total viewing time, EU27 films



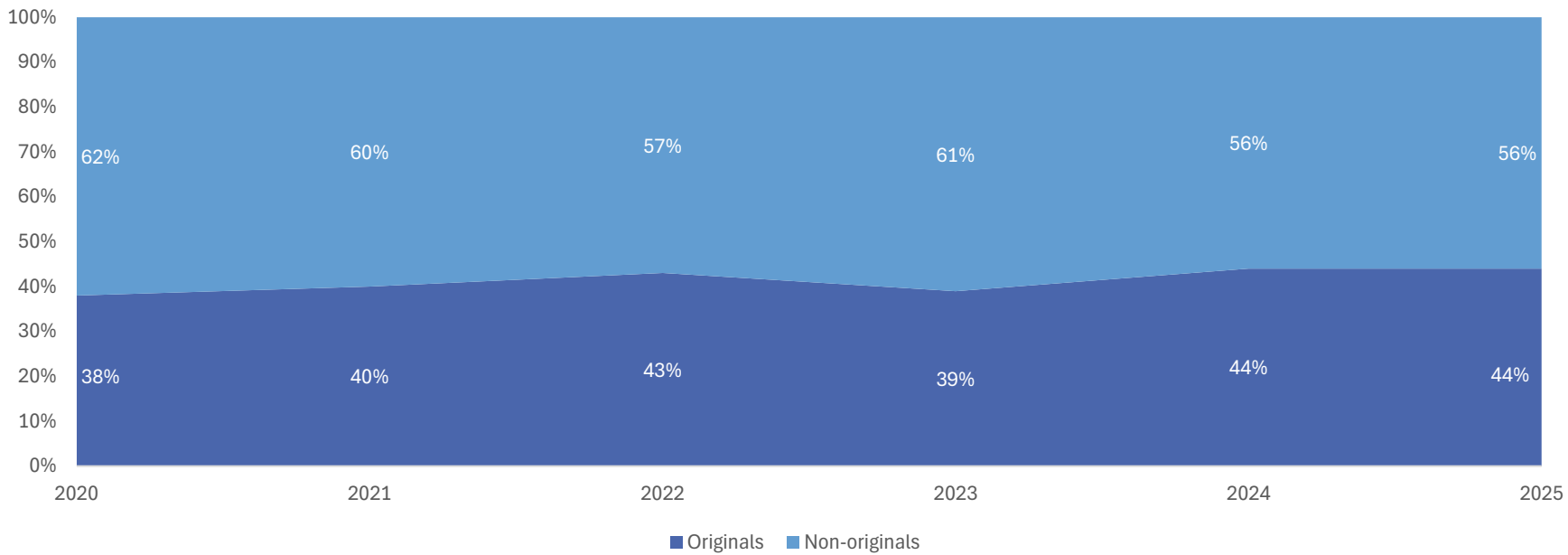
Source: OBS based on Digital i data

European Audiovisual Observatory

Originals– Strong increase in original viewing time of all origins TV seasons

- The viewing time share of original titles increased to 44% in 2025.

Originals vs non-originals - Evolution of viewing time
In % of total viewing time, TV seasons all origins



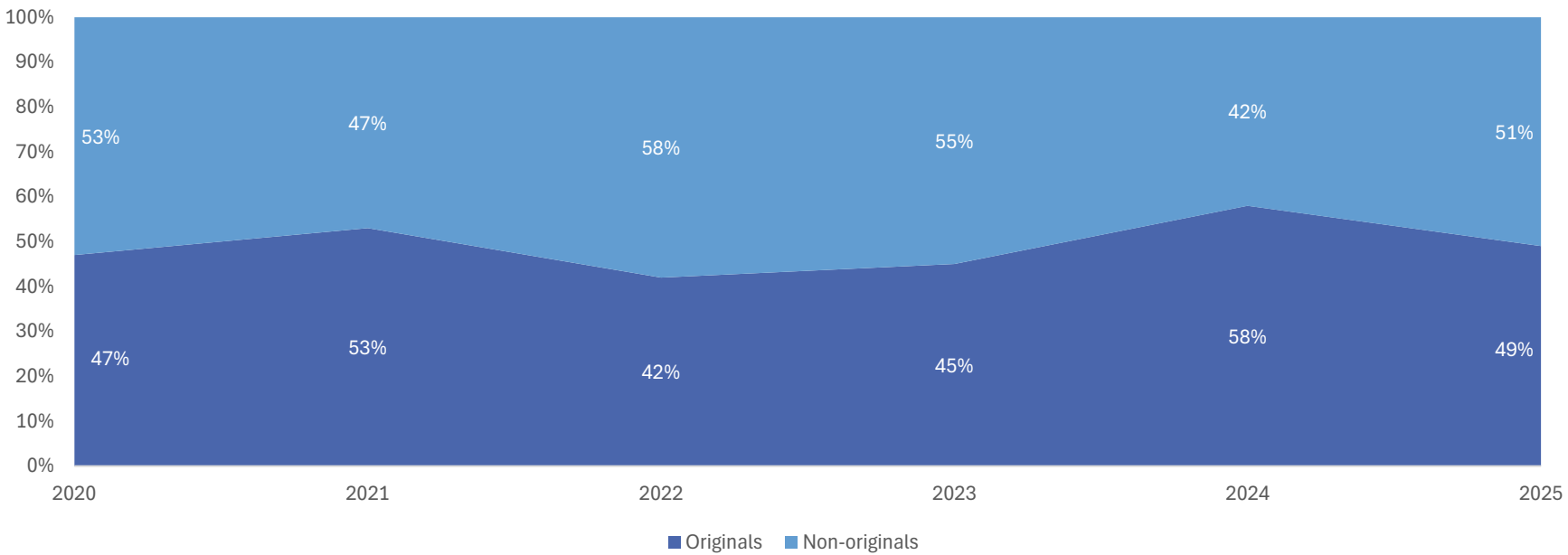
Source: OBS based on Digital i data

European Audiovisual Observatory

Originals– Steady increase of original viewing time of EU27 TV seasons since 2022

- The viewing time share of original titles went from 47% in 2020 to 49% in 2025..

Originals vs non-originals - Evolution of viewing time
In % of total viewing time, TV seasons EU27



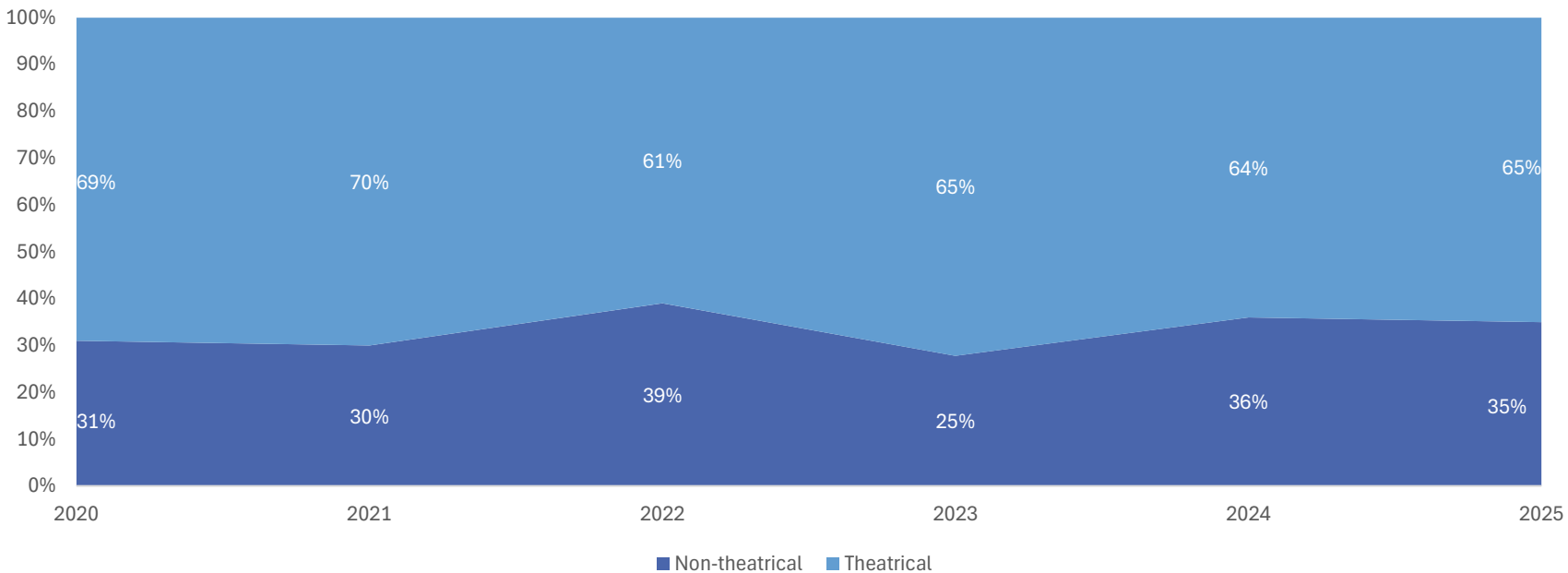
Source: OBS based on Digital i data

European Audiovisual Observatory

Theatrical – 1/3 viewing time goes to non-theatrical films

- The proportion of non-theatrical viewing time remained stable at 35% in 2025.

Theatrical vs non-theatrical films - Evolution of viewing time
In % of total viewing time, all origins



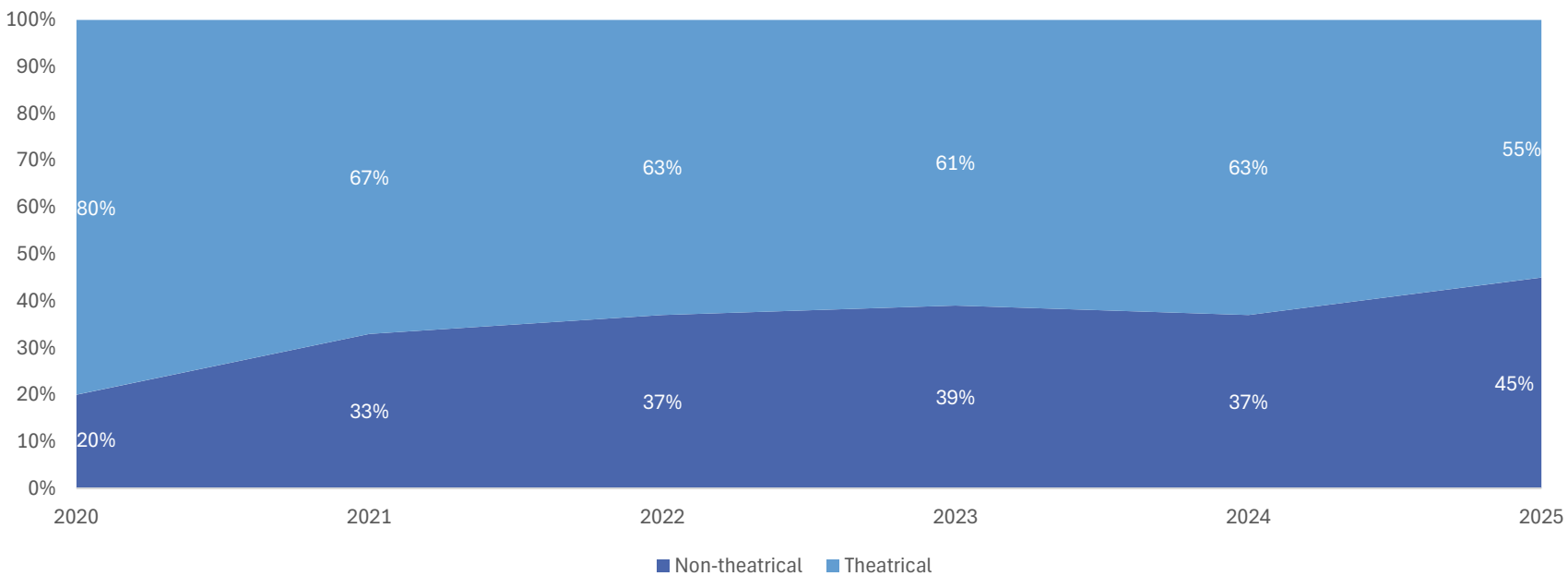
Source: OBS based on Digital i data

European Audiovisual Observatory

Theatrical – the share of viewing time for non-theatrical is even higher for EU27

- Viewing time for non-theatrical EU27 films increased from 20% in 2020 to 45% in 2025.

Theatrical vs non-theatrical films - Evolution of viewing time
In % of total viewing time, EU27 films



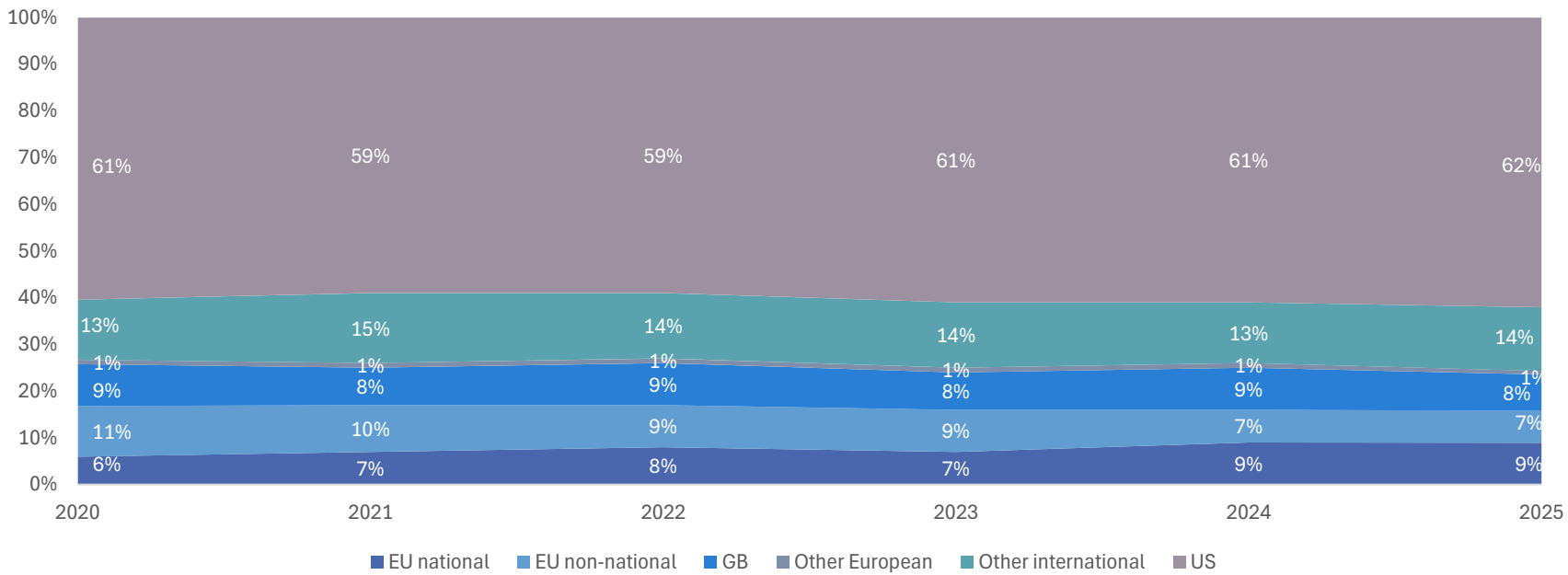
Source: OBS based on Digital i data

European Audiovisual Observatory

EU viewing stable with national viewing increasing and non-national decreasing

- While the viewing time of EU works remains stable, the share of national EU works increases from 6% to 9% over the period and the share of non-national EU works decreases from 11% to 7%.

Evolution of viewing time of all works by origin
In % of total viewing time



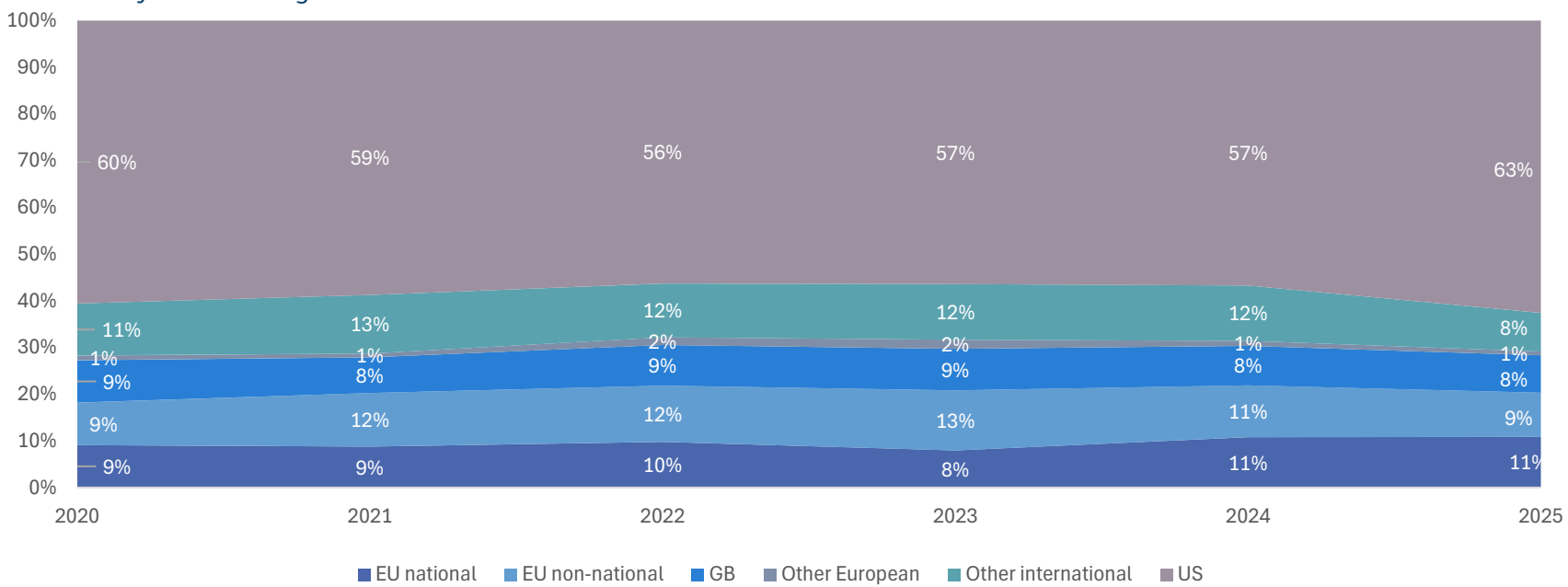
Source: OBS based on Digital i data

European Audiovisual Observatory

Increase in share of EU national viewing time

- The US films share of viewing time increased from 57% to 63% between 2024 and 2025.
- The viewing share of other international films dropped from 12% to 8% between 2024 and 2025.

Evolution of viewing time of films by origin
In % of total viewing time



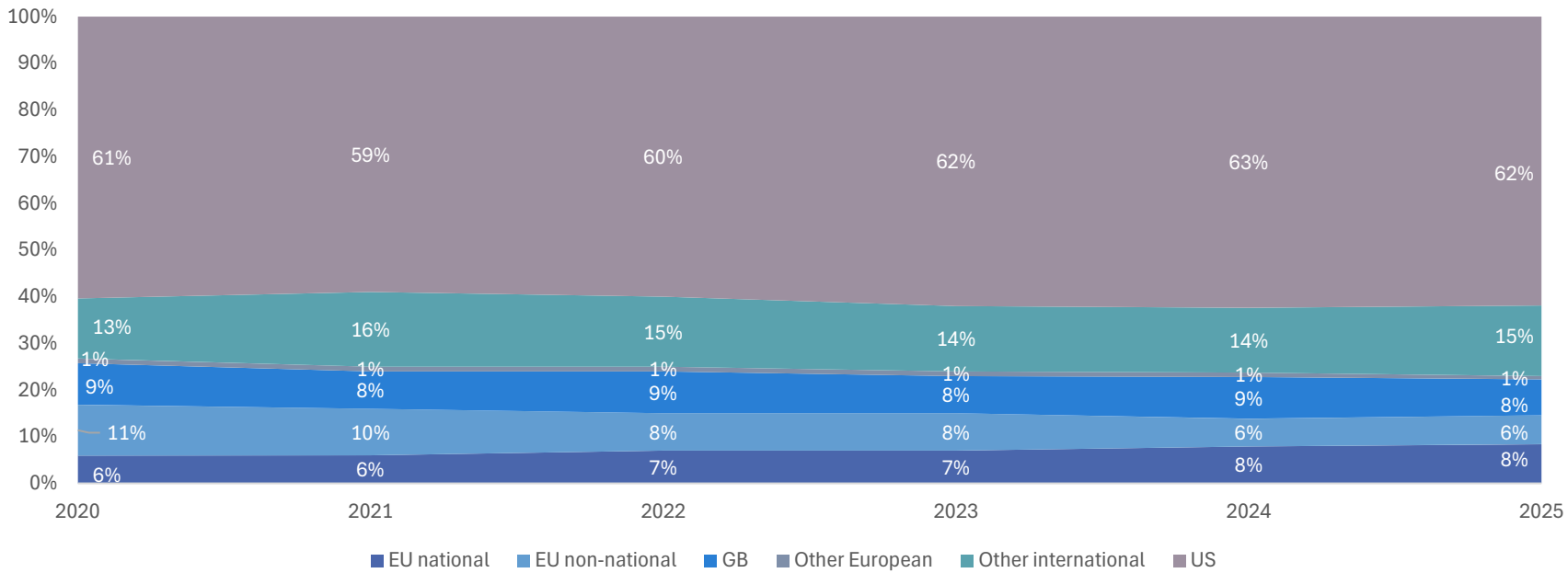
Source: OBS based on Digital i data

European Audiovisual Observatory

European TV seasons share of viewing time falls, due to fall in EU non-national and GB viewing

- The share of European TV seasons viewing time decreased from 27% in 2020 to 23% in 2025 as the share of EU non-national and GB viewing time decreased respectively from 11% to 6% and from 9% to 8% respectively.

Evolution of viewing time of TV seasons by origin
In % of total viewing time



Source: OBS based on Digital i data

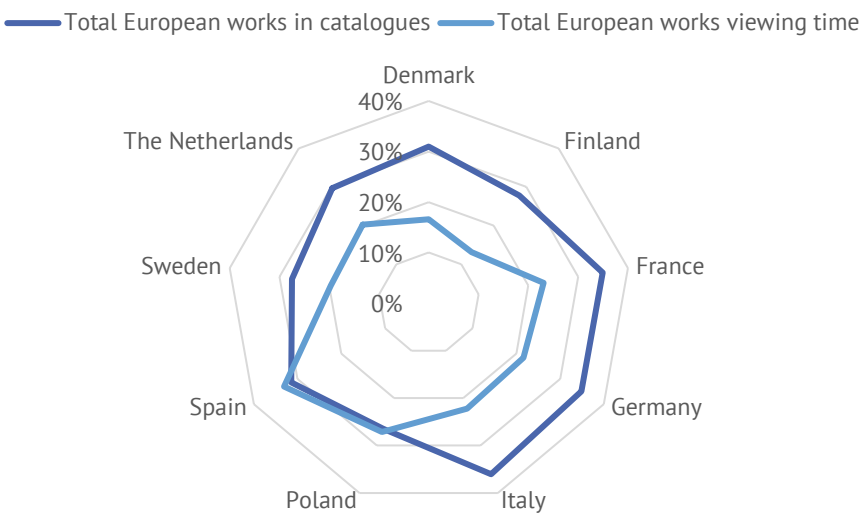
European Audiovisual Observatory

Part 3: Comparison – share of catalogues and share of viewing time

European Audiovisual Observatory

European content viewed more than its share of the catalogue in two countries

- In the sample, European content (EU national + EU non-national + GB + Other European) represents 31% of the catalogues but only 24% in consumption.
- Finland is the country where the gap between viewing time and catalogue is the widest (+15 p.p. vs catalogue) for European works.
- Spain and Poland are the only two countries where European content is watched more than its share of the catalogue (+2 p.p. vs catalogue and +1 p.p. vs catalogue respectively).



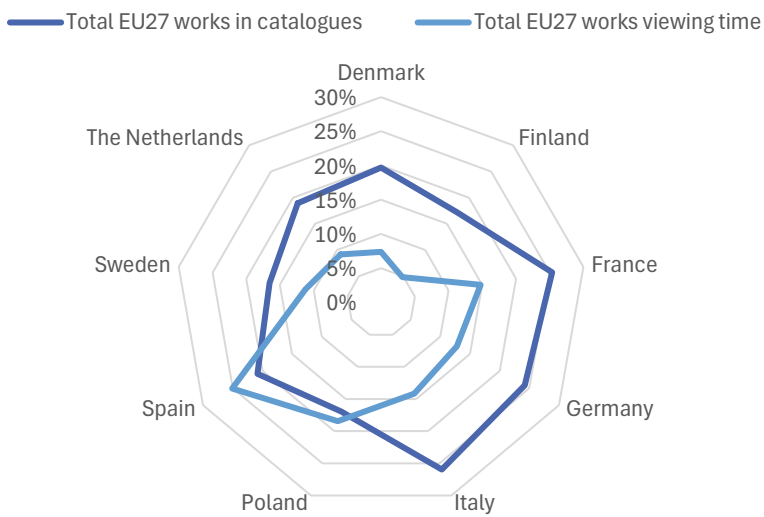
Viewing time vs share of works in catalogue
In % of total viewing time and number of works, EU9, 2025

Source: OBS based on Digital i and JustWatch data

European Audiovisual Observatory

EU27 content is watched more than its share in catalogue in Poland and Spain

- In the sample, EU27 content (EU national + EU non-national) represents 21% of the sample catalogue, but only 16% of consumption.
- Denmark, Finland and Italy are the countries with the largest gap between viewing time and catalogue (-12 p.p. vs catalogue).
- Spain and Poland are the only countries where EU27 content is watched more than its share of the catalogue (+4 p.p. vs catalogue and +1 p.p. vs catalogue respectively).



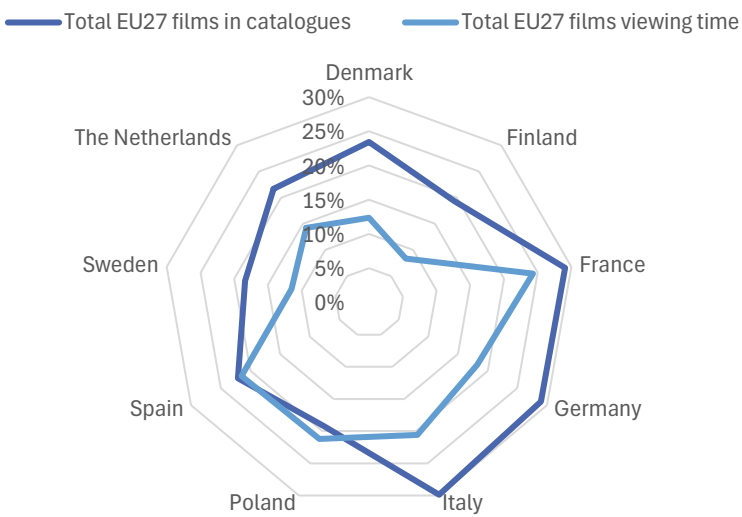
Viewing time vs share of works in catalogue
In % of total viewing time and number of works, EU9, 2025

Source: OBS based on Digital i and JustWatch data

European Audiovisual Observatory

EU27 films viewed less than their share of the catalogue in eight countries

- In the sample, the share of EU27 films in consumption (20%) is lower than their share in the catalogue (24%).
- Poland is the only country where EU27 films are watched more than their share in the catalogue (+2 p.p. vs catalogue).
- Denmark, Finland and Germany are the countries where the gap between viewing time and catalogue is the widest (-11 p.p. vs catalogue).



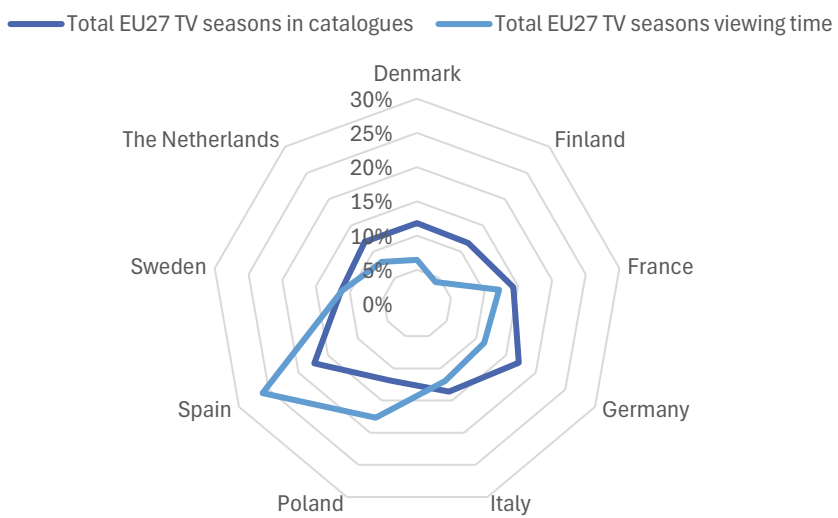
Films - viewing time vs share of works in catalogue
In % of total viewing time and number of works, EU9, 2025

Source: OBS based on Digital i data

European Audiovisual Observatory

EU27 TV seasons viewed less than their share in catalogue in seven countries

- In the sample, European TV seasons share of viewing time (15%) is above its share in catalogue (14%).
- Spain and Poland are the only two countries where European content is watched more than its share of the catalogue (+9 p.p. vs catalogue and +6 p.p. vs catalogue respectively).
- Finland is the country where the gap between viewing and catalogue is the widest (-7 p.p. vs catalogue).



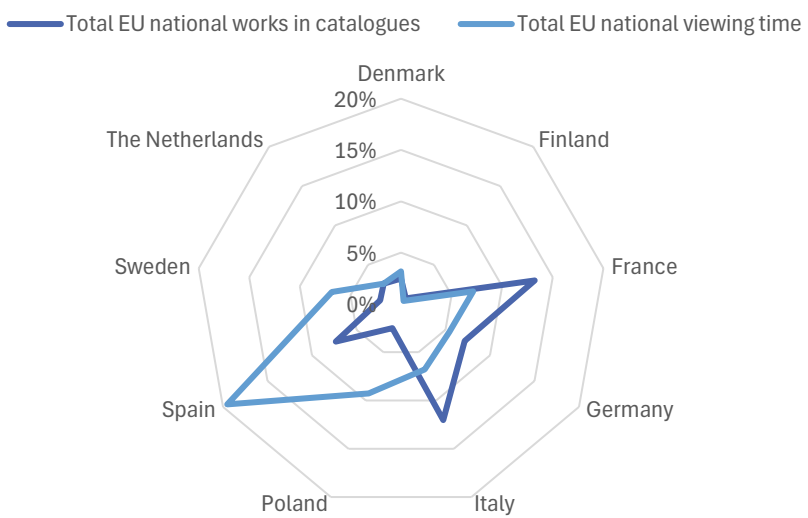
TV seasons - viewing time vs share of works in catalogue
In % of total viewing time and number of works, EU9, 2025

Source: OBS based on Digital i and JustWatch data

European Audiovisual Observatory

National content viewed more than its share in the catalogue in four countries

- Consumption of national content is higher than its share in the catalogue (9% vs 6%).
- Spain, Poland, Sweden and Denmark are the four countries where national content is consumed more than its share in the catalogue.
- Spain is the country where national content is consumed the most compared to its share in the catalogue (+17 p.p.).



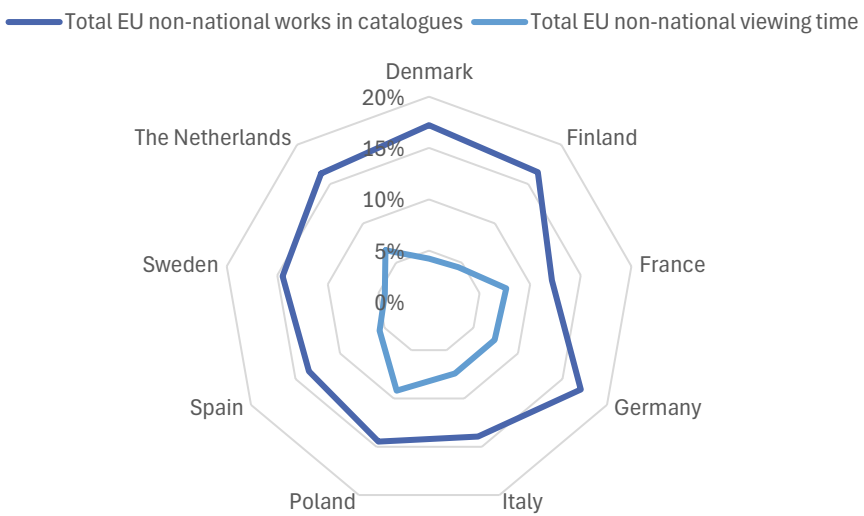
Viewing time vs share of works in catalogue
In % of total viewing time and number of works, EU9, 2025

Source: OBS based on Digital i and JustWatch data

European Audiovisual Observatory

EU non-national content viewed less than its share of the catalogue in all countries

- EU non-national content represents 15% of the catalogue in the sample, but only 7% of consumption.
- EU non-national content is less watched than its share in the catalogue in all countries.
- Denmark is the country where EU non-national content is consumed the least compared to its share in the catalogue (-13 p.p.).
- France and Poland are the countries where the gap between consumption of EU non-national and catalogue content is the smallest (-5 p.p).



Viewing time vs share of works in catalogue
In % of total viewing time and number of works, EU9, 2025

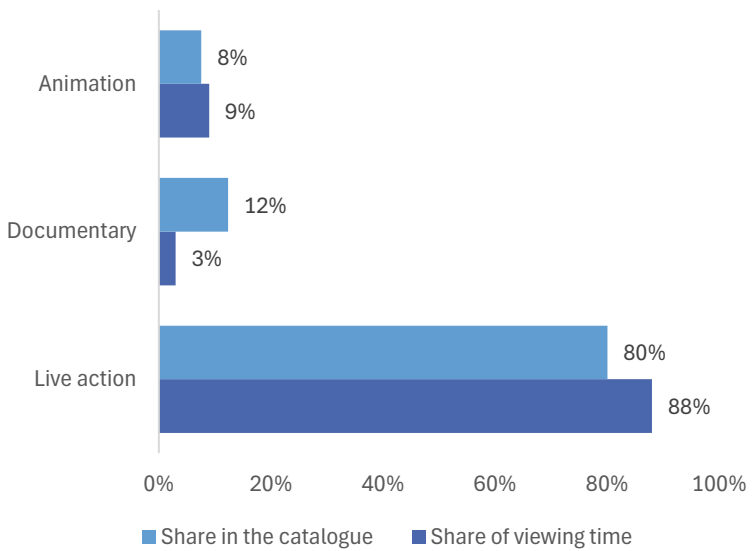
Source: OBS based on Digital i and JustWatch data

European Audiovisual Observatory

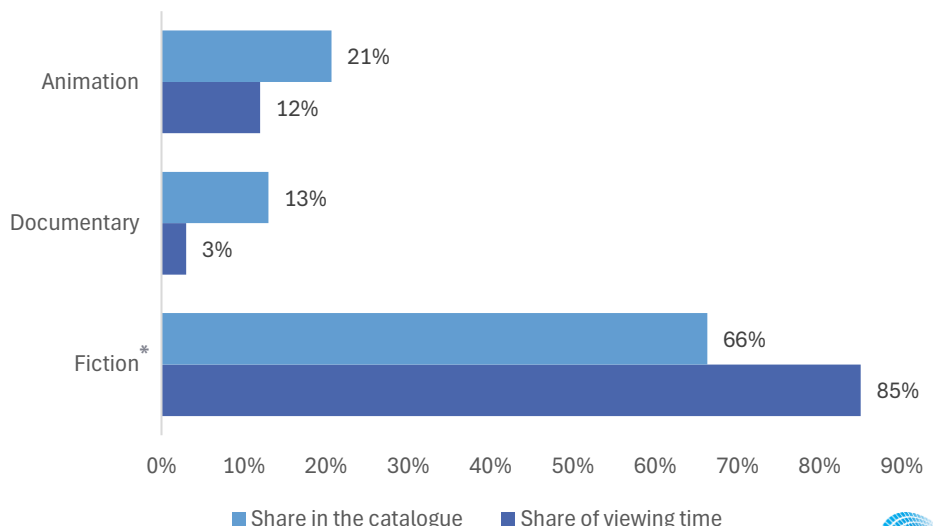
Live-action and fiction TV more watched than their catalogue share

- Animation and live-action films are consumed more than their share in the catalogue (+1 p.p. and +8 p.p. respectively).
- Fiction TV is consumed much more than its share in the catalogue (+19 p.p.).
- Documentary and animation TV series are consumed less than their share in the catalogue (-10 p.p. and -9 p.p. respectively).

Films - viewing time vs share of works in catalogue
In % of total viewing time and number of films, EU9, 2025



TV seasons - viewing time vs share of works in catalogue
In % of total viewing time and number of TV seasons, EU9, 2025



Source: OBS based on Digital i and JustWatch data

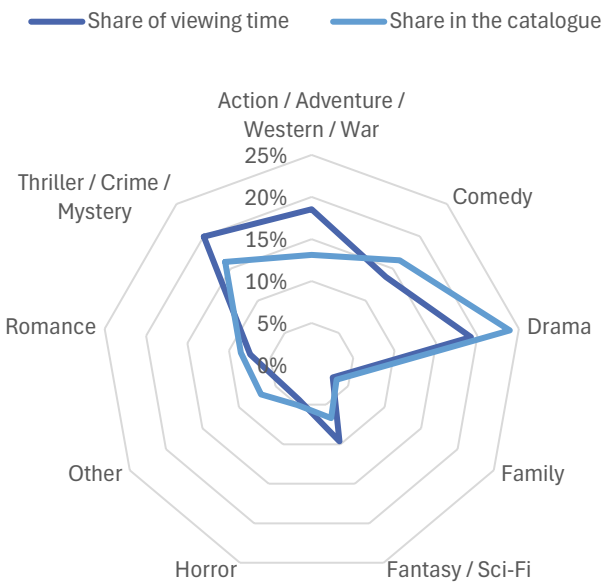
*Titles that were not classified as either 'Animation' or 'Documentary''.

European Audiovisual Observatory

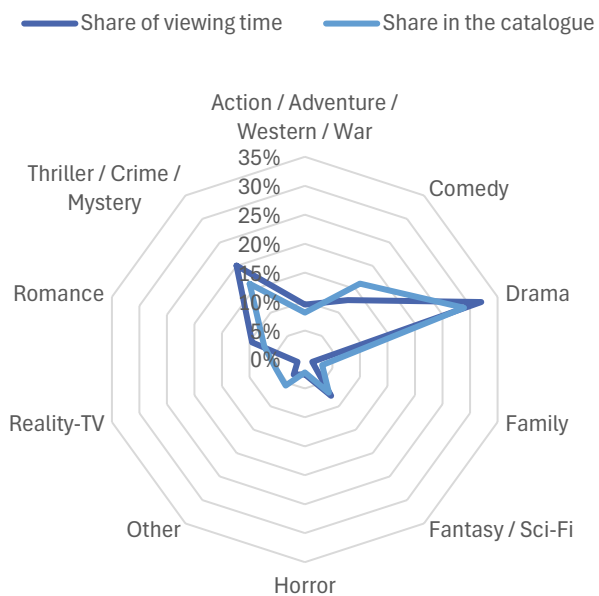
Thriller films and TV seasons viewed more than their share of the catalogue

- Action, thriller and fantasy films are consumed more than their share in the catalogue (+5 p.p., +4 p.p. and +3 p.p. respectively).
- Action, drama, fantasy, romance and thriller TV seasons are consumed more than their share in the catalogue (+1 p.p., +3 p.p., +1 p.p., +2 p.p. and +4 p.p. respectively).

Films - viewing time vs share of works* in catalogue
In % of total viewing time and number of films, EU9, 2025



TV seasons - viewing time vs share of works* in catalogue
In % of total viewing time and number of TV seasons, EU9, 2025



Source: OBS based on Digital i and JustWatch data

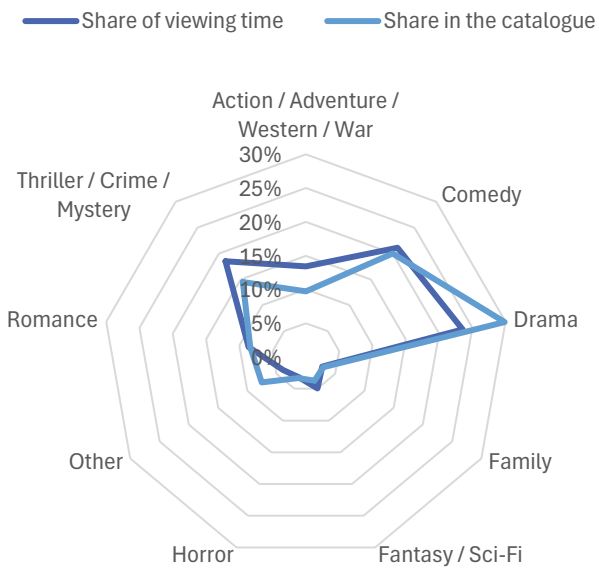
*Works are counted more than once as they have several genres. This is an approximation.

European Audiovisual Observatory

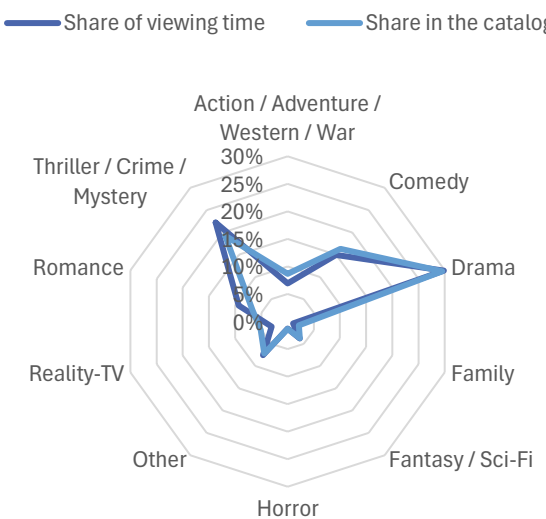
Thriller films and TV seasons viewed more than their share of the catalogue

- EU27 action, comedy, fantasy and thriller films are consumed more than their share in the catalogue (+4 p.p., +1 p.p., +1p.p. and +4 p.p. respectively).
- EU27 romance and thriller TV seasons are consumed more than their share in the catalogue (+3 p.p. for both genres).

EU27Films - viewing time vs share of works* in catalogue
In % of total viewing time and number of films, EU9, 2025



EU27TV seasons - viewing time vs share of works* in catalogue
In % of total viewing time and number of TV seasons, EU9, 2025



Source: OBS based on Digital i and JustWatch data

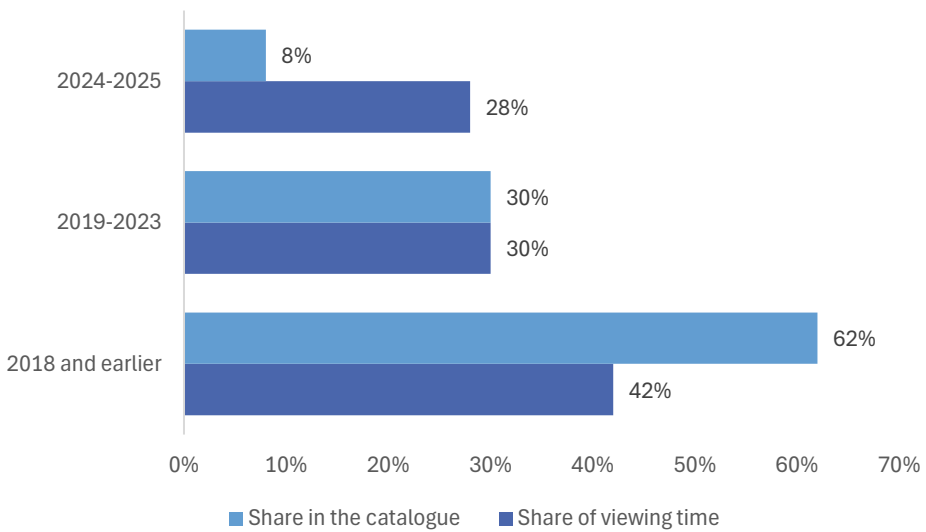
*Works are counted more than once as they have several genres. This is an approximation.

European Audiovisual Observatory

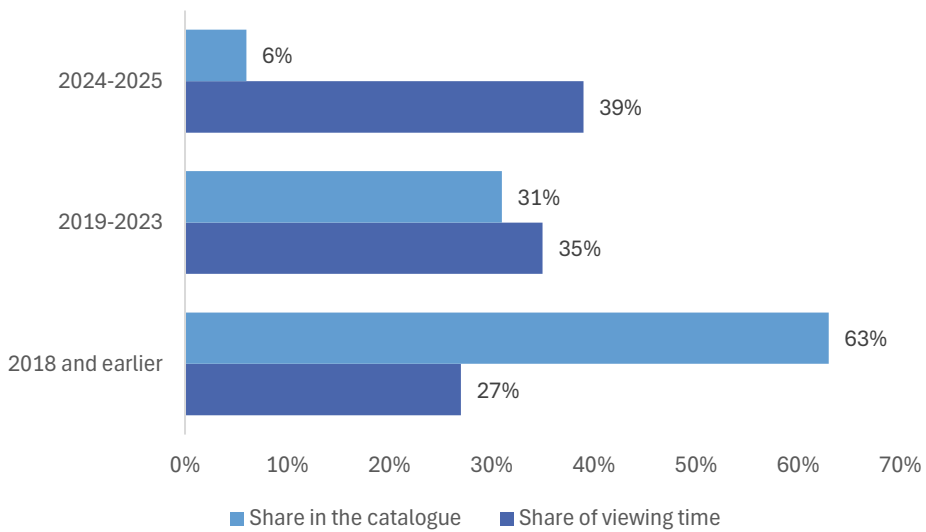
Recency bonus in viewing time for films

- Although catalogue films make up over 60% of the films available in the catalogue, they account for just 42% of the total viewing time for all films and 27% for EU27 films.
- Films produced in 2024–2025 account for 28% of the viewing time of all films, and up to 39% of the viewing time of EU27 films. However, they only represent 8% of films in the catalogue, and 6% of EU27 films.

All films - Split of viewing time and share in catalogues by year of production
In % of total viewing time and total films in catalogues, EU9, 2025



EU27 films - Split of viewing time and share in catalogues by year of production
In % of total viewing time and total films in catalogues, EU9, 2025



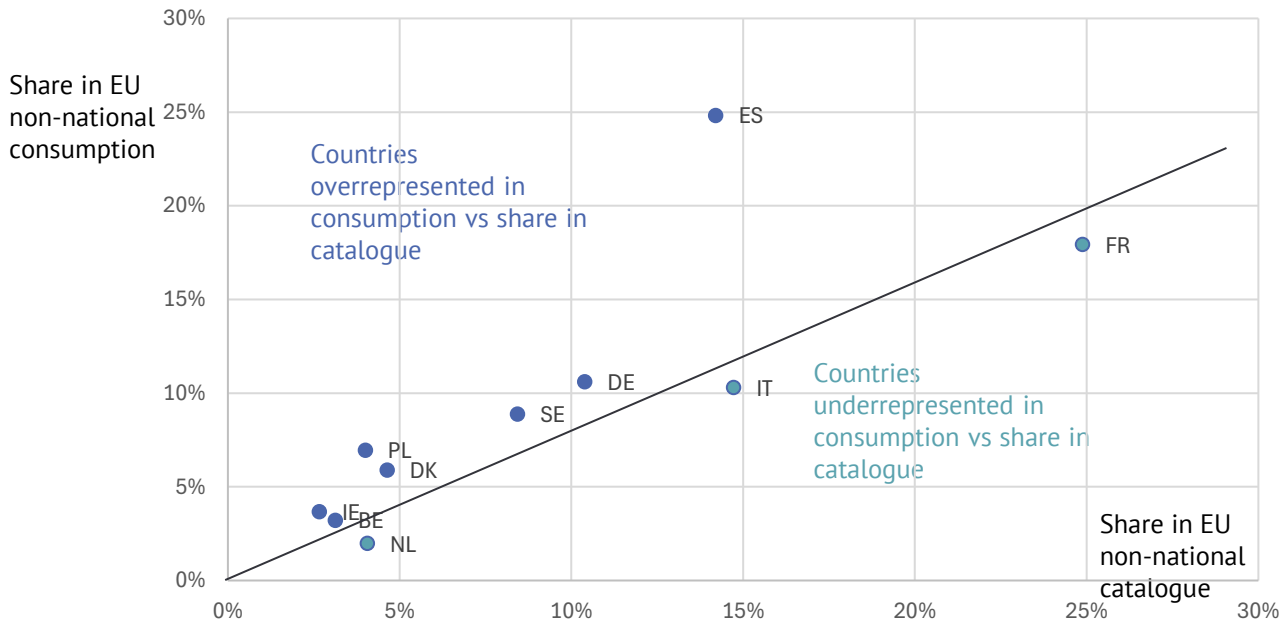
Source: OBS based on Digital i and JustWatch data

European Audiovisual Observatory

Relationship between share of viewing time and share of catalogue– only EU non-national works

- 7 countries have a higher share of viewing time than their share of SVOD catalogues (ES, DE, SE, PL, DK).
- France and Italy are two major production countries whose share of consumption is significantly lower than their share of catalogues (18% of consumption against 25% of catalogue for France and 10% of consumption against 15% of catalogue for Italy).

Comparison share in catalogue vs consumption of EU non-national content
(10 biggest countries' share in catalogue)



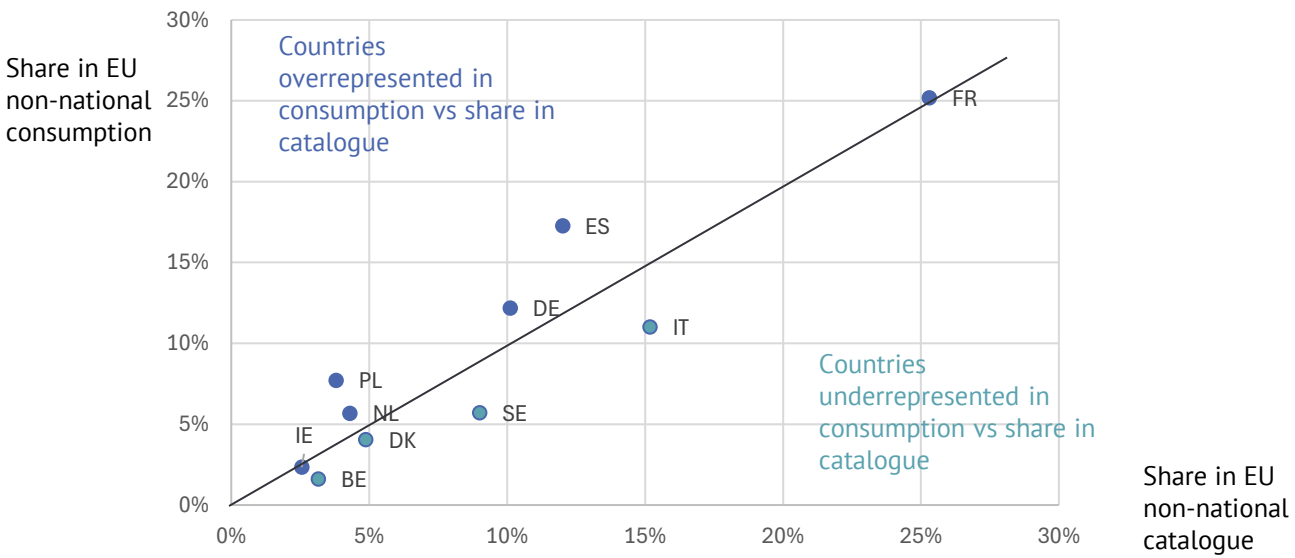
Source: OBS based on Digital i and JustWatch data

European Audiovisual Observatory

Relationship between share of viewing time and share of catalogue – Films – Only EU non-national works

- 6 EU countries have a higher share of viewing time of EU non-national films than their share in the catalogue (FR, ES, DE, NL, PL, IE).
- 4 EU countries have a lower share of viewing time of EU non-national films than their share in the catalogue (IT, SE, DK, BE).

Comparison share in catalogue vs consumption of EU non-national films
(10 biggest countries' share in catalogue)



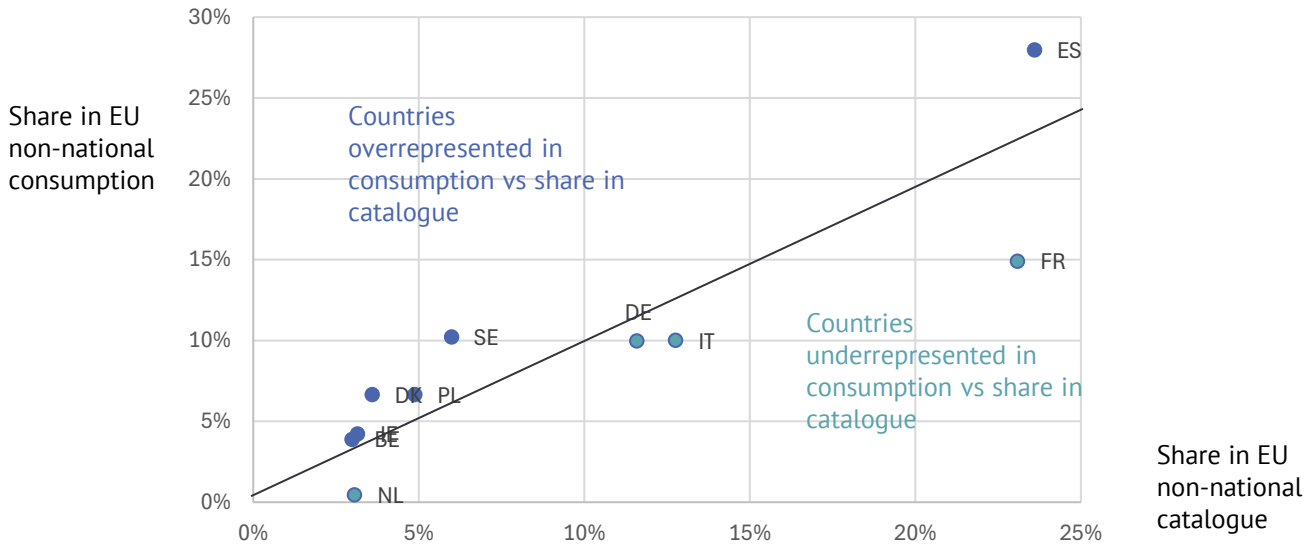
Source: OBS based on Digital i and JustWatch data

European Audiovisual Observatory

Relationship between share of viewing time and share of catalogue – TV seasons – Only EU non-national works

- 6 EU countries have a higher share of viewing time for non-national EU TV seasons than their share in the catalogue (ES, SE, PL, DK, IE, BE).
- 4 EU countries have a lower share of viewing time for non-national EU films than their share in the catalogue (FR, IT, DE, NL).

Comparison share in catalogue vs consumption of EU non-national TV seasons
(10 biggest countries' share in catalogue)



Source: OBS based on Digital i and JustWatch data

European Audiovisual Observatory

Relationship between share of viewing time and share of catalogue – only EU non-national works – time serie

- Spain, Ireland, Germany, Poland and Belgium are the five countries whose content generate more viewing time compared to their share of the catalogue in 2020-2025.

Ratio of viewing time to catalogue share of EU non-national content
(10 biggest countries' share in catalogue)

Origin	2020	2021	2022	2023	2024	2025
FR	0,41	0,82	0,6	0,97	0,78	0,72
ES	2,13	2,24	2,05	1,8	2,03	1,75
DE	1,09	1,11	1,19	1,16	1,04	1,02
IT	0,46	0,43	0,55	0,43	0,48	0,70
PL	2,44	1,06	1,89	1,58	1,28	1,74
SE	0,65	0,38	0,64	0,58	0,76	1,05
IE	2,58	2,89	2,43	1,74	2,73	1,38
NL	0,39	0,72	0,85	0,56	0,46	0,49
BE	1,27	1,26	1,11	1,35	1,04	1,03
DK	0,99	0,84	1	0,75	0,53	1,27

How to read this table: works from countries with a ratio higher than 1 get a higher share of non-national SVOD viewing than their share in catalogues

Source: OBS based on Digital i and JustWatch data

European Audiovisual Observatory

- Spain, Germany and Poland are the three countries whose films generate more viewing time compared to their share of the catalogue in 2020-2025.

Ratio of viewing time to catalogue share of EU non-national films
(10 biggest countries' share in catalogue)

Origin	2020	2021	2022	2023	2024	2025
FR	0,84	0,97	0,86	0,97	0,82	1
ES	1,39	1,36	1,67	1,73	1,6	1,44
DE	1,33	2,01	1,18	1,42	1,15	1,2
IT	0,61	0,47	0,48	0,44	0,57	0,72
PL	6,68	1,36	2,97	2,53	2,31	2,03
SE	0,31	0,37	0,46	0,48	0,63	0,63
IE	0,8	1,02	1,08	0,9	2,88	0,92
NL	0,29	1,15	1,27	1,01	0,56	1,32
BE	2,26	2	1,31	1,24	1,4	0,5
DK	0,61	0,39	0,99	0,79	0,5	0,83

How to read this table: works from countries with a ratio higher than 1 get a higher share of non-national SVOD viewing than their share in catalogues

Source: OBS based on Digital i and JustWatch data

Relationship between share of viewing time and share of catalogue – TV seasons – Only EU non-national works – time serie

- Spain and Ireland are the two countries whose TV seasons generate more viewing time compared to their share of the catalogue in 2020-2025.
- Thanks to the success of *Secrets We Keep*, Denmark gets the best ratios in 2025.

Ratio of viewing time to catalogue share of EU non-national TV seasons
(10 biggest countries' share in catalogue)

Origin	2020	2021	2022	2023	2024	2025
FR	0,29	0,72	0,52	0,97	0,74	0,65
ES	2	1,57	1,33	1,27	1,48	1,19
DE	1,39	0,72	1,07	0,94	0,93	0,86
IT	0,77	0,85	0,89	0,55	0,55	0,78
PL	1,13	1,31	1,5	0,99	0,74	1,36
SE	0,52	0,66	1,35	1,15	1,26	1,71
IE	2,05	2,08	1,71	1,44	2,04	1,34
NL	0,71	0,58	1,08	0,57	0,73	0,14
BE	0,73	0,72	0,96	1,44	0,84	1,31
DK	0,74	0,71	0,74	0,61	0,53	1,86

How to read this table: works from countries with a ratio higher than 1 get a higher share of non-national SVOD viewing than their share in catalogues

Source: OBS based on Digital i and JustWatch data

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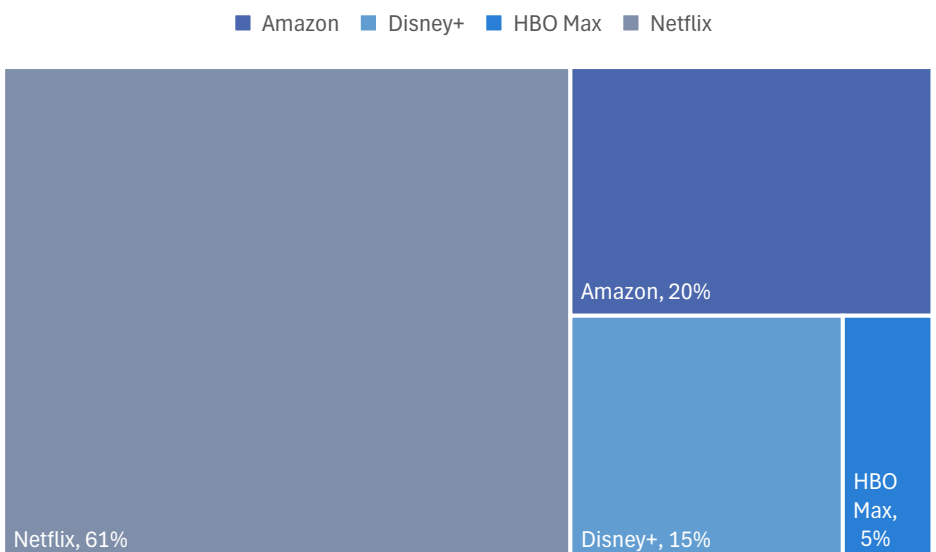
Appendix

Netflix accounts for the lion's share of viewing time

- The 4 main global SVOD platforms are represented in the sample.
- There is no data for HBO Max in Germany, France and Italy.

Split of total viewing time by provider
In share of total viewing time 2025



SVOD services	DE	DK	ES	FI	FR	IT	NL	PL	SE
Netflix	x	x	x	x	x	x	x	x	x
Amazon	x	x	x	x	x	x	x	x	x
Disney+	x	x	x	x	x	x	x	x	x
HBO Max		x	x	x			x	x	x

Source: OBS based on Digital i data

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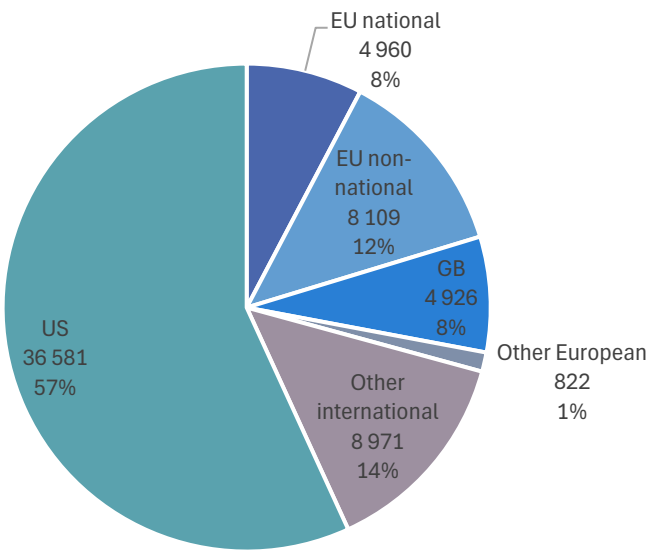
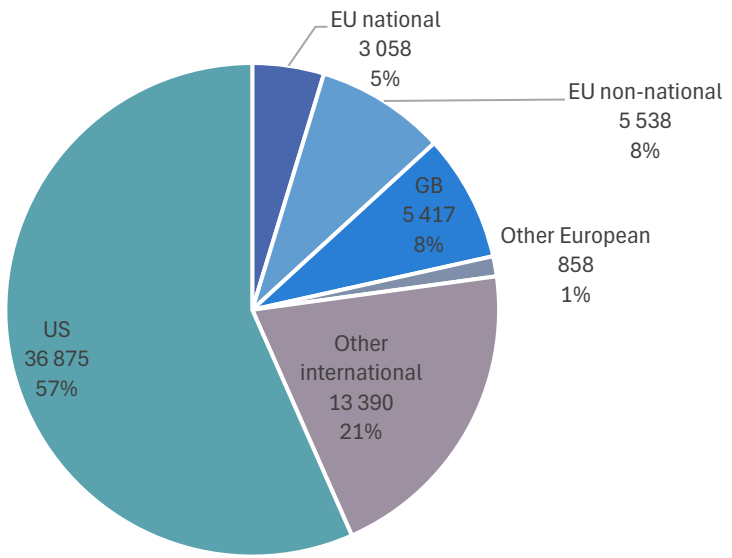
The sample of works measured by region of origin

- European films account for 29% of all films in the sample of films measured on SVOD and European TV series for 23% of all TV series available.

Origin of 64 369 films in the sample by country of origin
In number of films



Origin of 65 136 TV seasons in the sample by country of origin
In number of TV seasons



Source: OBS based on Digital i data

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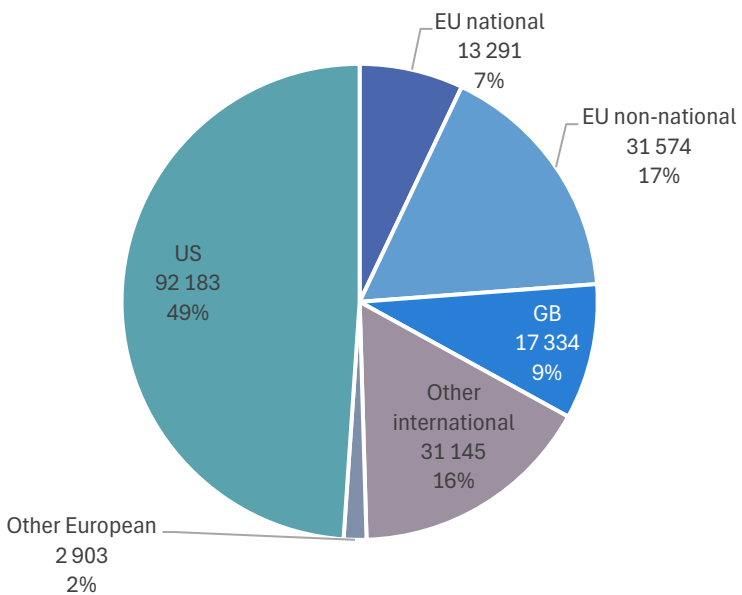
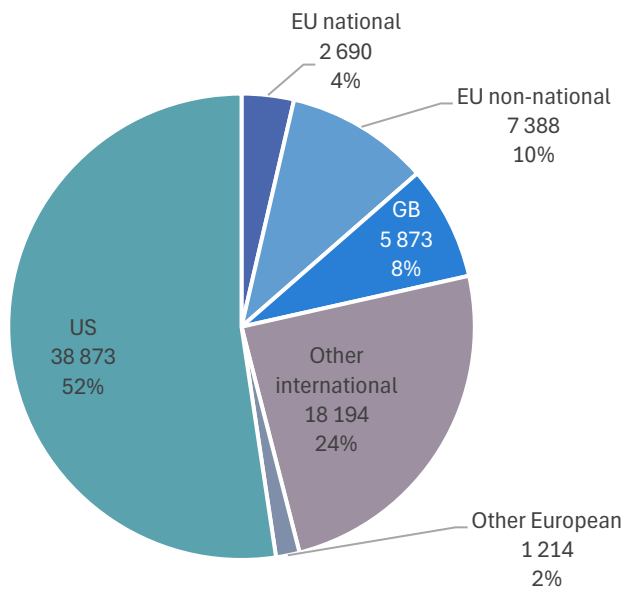
Composition of film and TV season catalogues by region of origin

- These data show the origin of films and TV seasons in SVOD catalogues in July 2025.
- European works account for 35% of film catalogue and 24% of TV seasons catalogues respectively.
- 49% of the film catalogues and 52% of the TV seasons catalogues are produced in the US, while 16% of all films and 24% of TV seasons are produced in other regions of the world.

Origin of 188 430 films in the catalogues by country of origin
In number of films



Origin of 74 232 TV seasons in the catalogues by country of origin
In number of TV seasons



Source: OBS on JustWatch data

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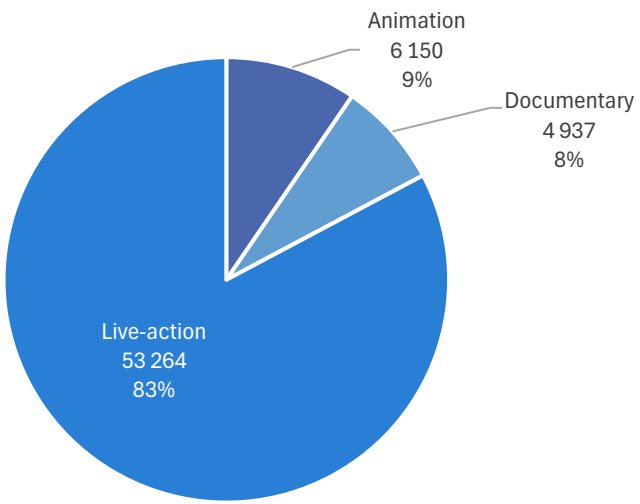
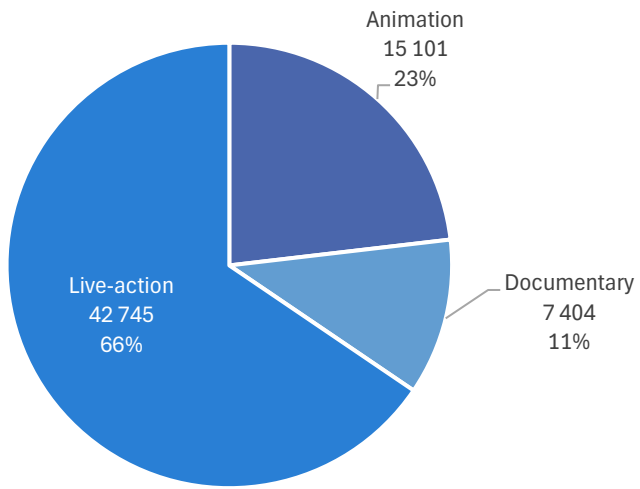
The sample of works by format

- In terms of format, live-action films (all fiction films not classified as animation or documentary) and fiction TV make up the majority of the works in the sample with 83% and 66% respectively.
- Animation accounts for 9% of the films in the sample and 23% of the TV seasons.
- Documentaries represent 8% of the films and 11% of the TV seasons in the sample of works measured.

Format of 64 351 films in the sample
In number of films



Format of 65 250 TV seasons in the sample
In number of TV seasons



Source: OBS based on Digital i

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Measured works

- The viewing data is based on a limited selection of works.

Number of works included in SVOD viewing time data
Jan. - Dec. 2025, by country

Country	movie	series	Grand Total
Denmark	4 702	5 683	10 385
Finland	4 056	5 321	9 377
France	9 568	8 322	17 890
Germany	11 225	9 394	20 619
Italy	10 485	7 227	17 712
Poland	6 323	7 240	13 563
Spain	10 672	9 792	20 464
Sweden	6 145	7 358	13 503
The Netherlands	6 021	6 871	12 892
Grand Total	**69 197**	**67 208**	**136 405**

Source: OBS based on Digital i data

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List of tables and figures

- **Part 1: The SVOD viewing landscape in 9 EU countries in 1 year**
  - Split of viewing time between films and TV seasons
  - Split of viewing time of all works by region of origin
    - Splif of viewing time of all works by region or origin per country
  - Split of viewing time of films and TV seasons by region of origin
    - Split of viewing time of films and TV seasons by region of origin per country
  - Split of viewing time of European films and TV seasons
  - Split of viewing time by format
    - Live action and fiction TV
    - Animation
    - Documentary
  - Split of viewing time by genre
  - Split of viewing time of films by year of production
    - Split of viewing time of films by year of production by country
  - Split viewing time original and non-original films
  - Split viewing time original and non-original TV seasons
    - Share of EU27 originals in national and EU non-national viewing time
  - Split viewing time theatrical and non-theatrical films
  - Concentration of viewing time – top lists all works
    - Films
    - TV seasons
    - Share of originals in top lists
  - Top lists of most watched works, films and TV seasons, of all origins and EU27

European Audiovisual Observatory

Table of Contents

- Viewing time of exported EU works
  - Viewing time by production country – all EU non-national works
  - Viewing time by production country – all EU non-national films
  - Viewing time by production country – all EU non-national TV seasons

- **Part 2: Evolution of viewing time**
  - Evolution of viewing time by content type
  - Evolution of viewing time - Originals vs non-originals
  - Evolution of viewing time – Theatrical vs non-theatrical
  - Evolution of viewing time by origin
    - Films
    - TV seasons

- **Part 3: Comparison – share of catalogues and share of viewing time**
  - Comparison works – share of catalogues and share of viewing time by origin
    - Films
    - TV seasons
  - Comparison works – share of catalogues and share of viewing time by format
  - Comparison works – share of catalogues and share of viewing time by genre
  - Comparison films - share of catalogues and share of viewing time by year of production
  - Comparison works – share of catalogues and share of viewing time by exported EU works
    - Comparison works – share of catalogues and share of viewing time by exported EU films
    - Comparison works – share of catalogues and share of viewing time by exported EU TV seasons

- **Appendix**
  - The sample of SVOD services in the audience measurement and split of viewing time by provider
  - The sample of works by region of origin in the audience measurement
  - Snapshot of SVOD catalogues by region of origin (July 2025)
  - The sample of works by genre
  - Number of measured works

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