

# SVOD Usage in the European Union

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# Introduction

The aim of this report is to give an overview of the view time on SVOD services of works (films and TV seasons) by origin, genre and age (only for films) 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 are the shares in terms of view time of films and TV content by region of origin and production country on SVOD services in a one-year period?
- What is the view time of works according to their genre (fiction, documentaries and animation) and their region of origin?
- How do the age of a film and its region of origin impact SVOD consumption?
- What are the shares in terms of view time of national and non-national European films and TV seasons on SVOD services?
- What are the shares of view time of original TV seasons and films in overall SVOD consumption?
- What are the shares in terms of view time of films and TV seasons by service provider and by origin on SVOD?
- What is the concentration of films and TV seasons in terms of view time on SVOD services?

# Methodology

- The data (catalogues and viewing time) were provided by Goldmedia ([vod-ratings](#)) from 39 service providers, representing 91 SVOD country catalogues. The data catalogue were automatically obtained by scrapping the platforms.
- Only viewing time on SVOD services was considered. Viewtime is calculated in hours.
- The retained time frame is from 1 September, 2022 to 1 September, 2023.
- A work is defined as either a film or a TV season.
- Only the first production country of a work is considered when identifying its region of origin.
- 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)
- Genres were assigned by using IMDb genre listings and reassigned according to the following rule:
  - 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 “Other TV genres” for TV seasons.

- The viewing data is based on a limited selection of works; no long tail analysis is possible

Number of works included in SVOD view time data

Sept. 2022 – Sept. 2023, by country

Country	Film	TV	Grand Total
DE	4 459	4 849	<b>9 308</b>
DK	1 564	2 348	<b>3 912</b>
ES	2 569	3 163	<b>5 732</b>
FI	1 228	2 025	<b>3 253</b>
FR	2 441	2 952	<b>5 393</b>
IT	2 611	2 676	<b>5 287</b>
NL	2 264	2 808	<b>5 072</b>
PL	2 281	2 673	<b>4 954</b>
SE	2 444	3 325	<b>5 769</b>
<b>Grand Total</b>	<b>21 861</b>	<b>26 819</b>	<b>48 680</b>

Source: OBS based on Goldmedia data

- In most countries covered by Goldmedia (except Germany), the viewing data is gathered through surveys.
- Goldmedia’s sample of households is statistically representative of the households in the given countries. As with all survey-based samples, small discrepancies can appear.
- TVOD data was excluded from this report as the sample of households and the sample of works were too small to be representative.
- Minor errors in the identification of a work may have happened. We estimate these errors to be less than 1% of works (115 films or 0.5% of the total and 138 TV seasons or 0.5% of the total have no identified country of production and were not included in the report).
- Please quote this report as “SVOD Usage in the European Union”, European Audiovisual Observatory.
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# The sample of SVOD services included in the report by country

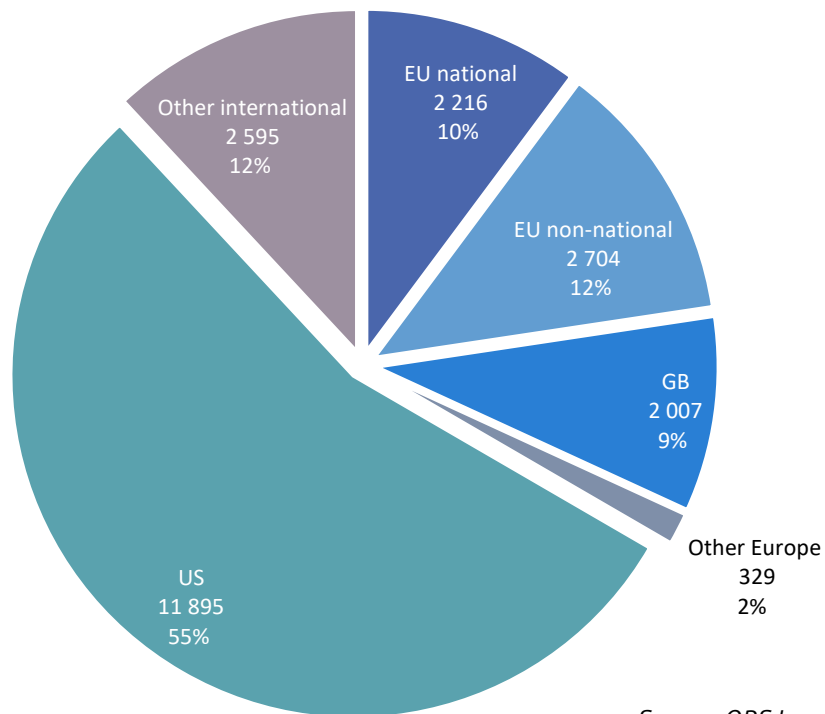
SVOD services	DE	DK	ES	FI	FR	IT	NL	PL	SE	Total EU9
Apple TV+	X	X	X	X	X	X	X	X	X	9
Atres Player Premium			X							1
Canal+ SVOD					X			X		2
Cda Premium								X		1
Discovery+	X	X				X	X		X	5
Disney+	X	X	X	X	X	X	X	X	X	9
FILMIN			X							1
FilmoTV/VideoFutur					X					1
FlixOlé			X							1
hayu.		X		X					X	3
HBO Max			X				X	X		3
Infinity						X				1
Lionsgate+	X				X	X				3
Magenta TV Megathek	X									1
Mitele Plus			X							1
Movistar+ SVOD			X							1
MUBI	X	X			X				X	4
Netflix	X	X	X	X	X	X	X	X	X	9
NowTV						X				1
OCS					X					1
Orange VOD			X							1
Paramount+	X					X				2
Prime Video	X	X	X	X	X	X	X	X	X	9
Rakuten TV			X			X			X	3
realeyz.tv	X									1
Ruutu				X						1
Salto					X					1
SFanytime		X								1
SFR Play					X					1
Sky Go	X					X				2
TIMVision						X				1
TV2 Play		X								1
ViaPlay		X		X				X	X	4
Videociety	X									1
Videoland							X			1
Vodafone TV			X							1
Vodafone Videothek	X									1
WOW Sky Ticket	X									1
<b>Grand Total</b>	<b>14</b>	<b>10</b>	<b>13</b>	<b>7</b>	<b>11</b>	<b>12</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>91</b>

Source: OBS based on Goldmedia

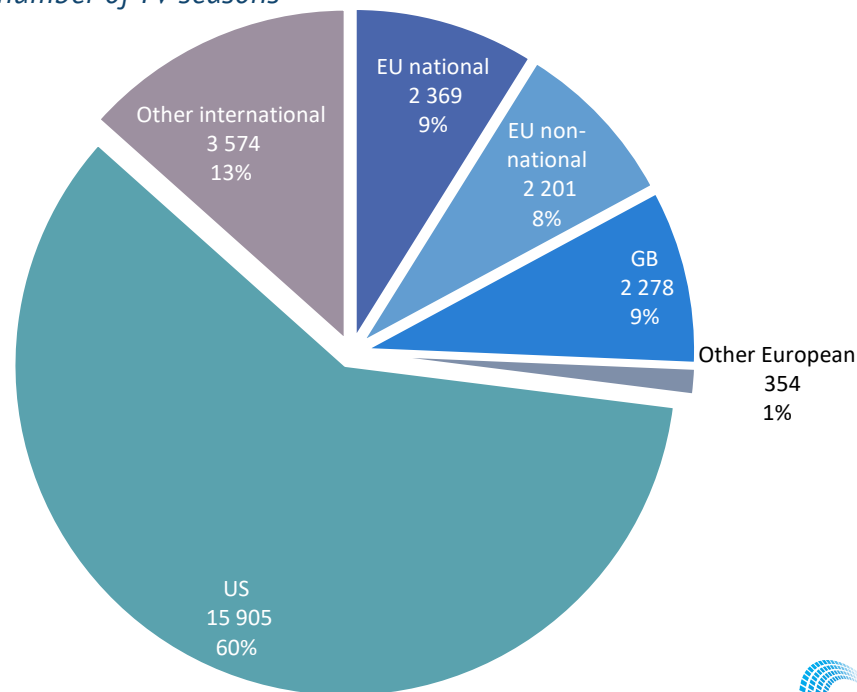
# The sample of works measured by region of origin

- European films accounted for 33% of all films in the sample of measured films on SVOD and European TV seasons for 27% of all available TV seasons. This is less than their share in the one-year period in SVOD catalogues with 43% for European films and 33% for TV seasons.
- However, these shares for European works are more in line with the shares found in the Observatory's VOD catalogue reports (with a share of 34% for European films and 23% for European TV seasons).
- US content is overrepresented in the sample compared to its share in catalogues in terms of both films and TV seasons, with respectively 41% and 51%, while other international works are underrepresented.

Origin of 21764 films in the sample by country of origin  
*In number of films*



Origin of 26681 TV seasons in the sample by country of origin  
*In number of TV seasons*



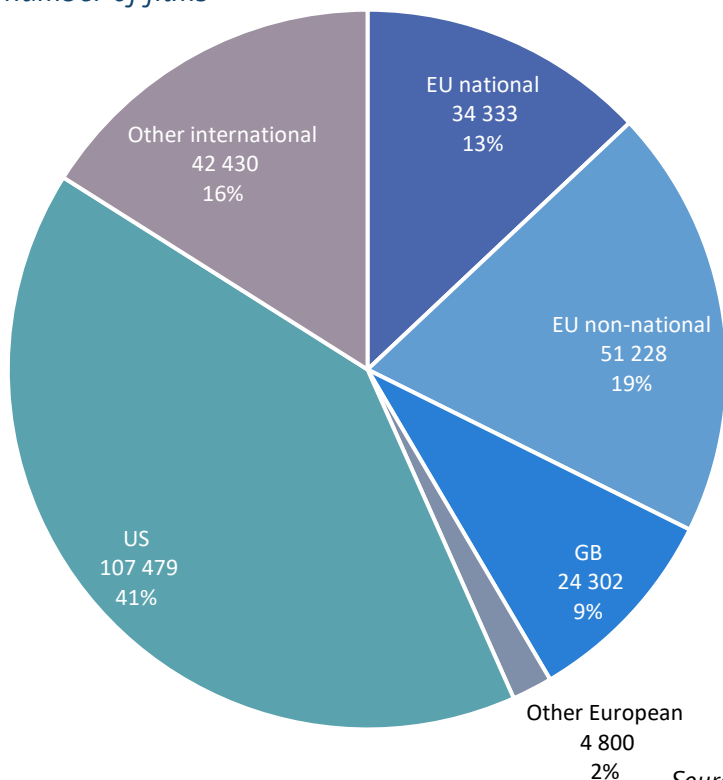
Source: OBS based on Goldmedia data



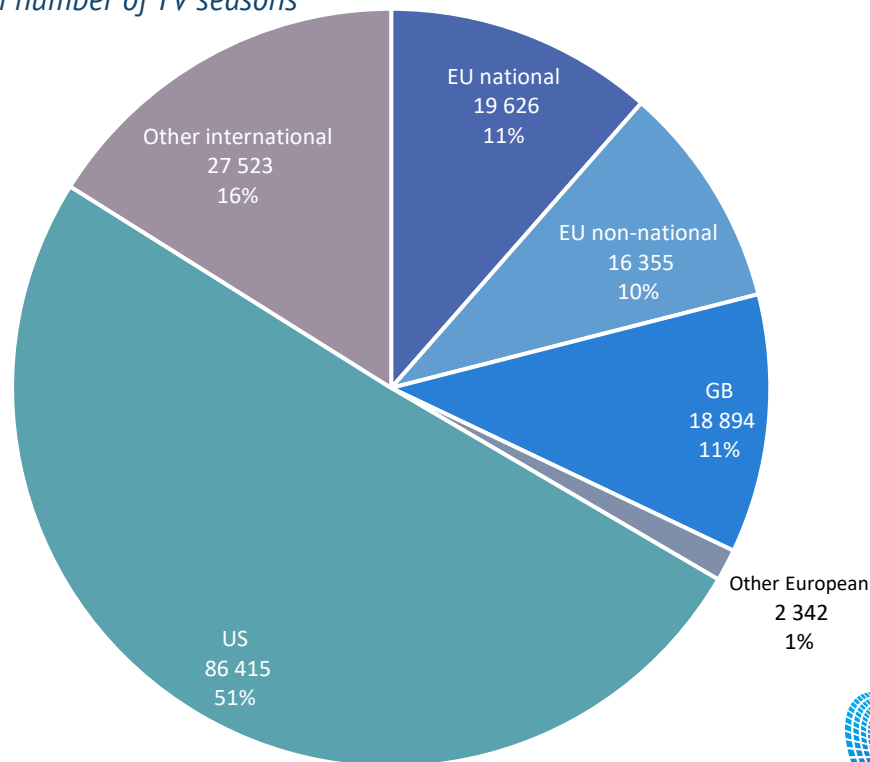
# The catalogues of works by region of origin over 1 year

- These catalogue data reflect the works in the catalogues of the selected SVOD services in a one-year period (September 2022 - September 2023). Therefore, the share of EU works appears higher than in the sample of works measured and in the Observatory's reports on VOD catalogues, which consider only a single day as the timeframe.
- European works account for respectively 43% and 33% of film and TV season catalogues.
- 41% of the film catalogues and 51% of the TV season catalogues are produced in the US and 16% in other world regions.

Origin of 264 572 films in the catalogues by country of origin  
*In number of films*



Origin of 171 155 TV seasons in the catalogues by country of origin  
*In number of TV seasons*

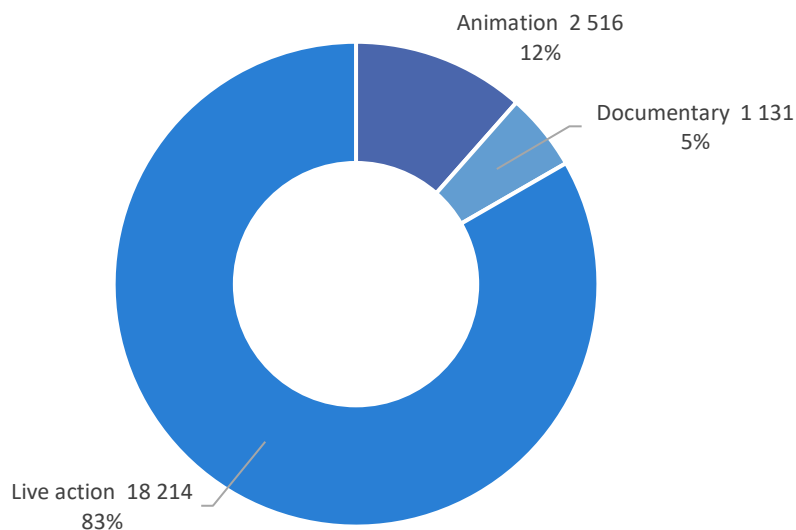


Source: OBS based on Goldmedia data

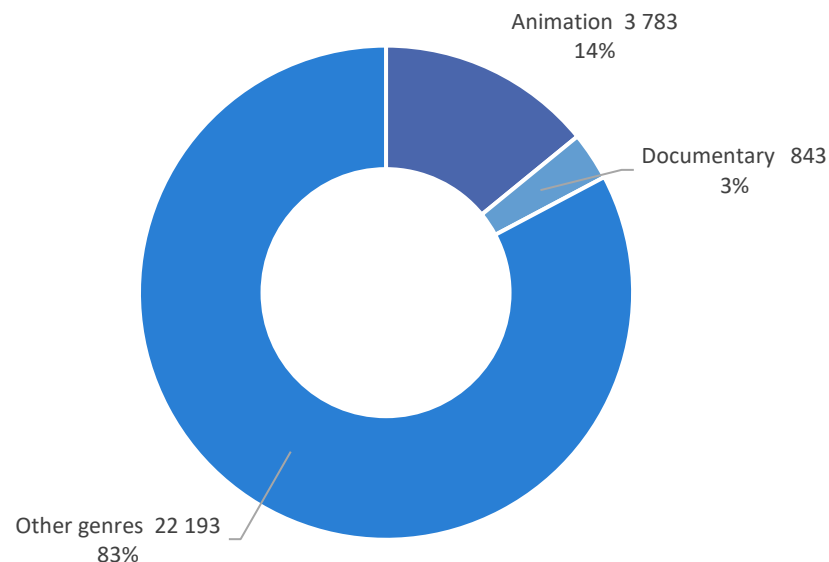
# The sample of works by genre

- When looking at genres, the bulk of the works in the sample are made up of live action films (all fiction films not classified as animation or documentaries) and other TV seasons (all other genres for TV series which are not animation or documentaries, e.g. drama, action, fantasy, YA, ...) with 83% respectively.
- Animation made up 12% of the films in the sample and 14% of the TV seasons.
- Documentaries accounted for 5% of all films and 3% of TV seasons in the sample of measured works.

Genre of 21 861 films in the sample  
*In number of films*



Genre of 26 819 TV seasons in the sample  
*In number of TV seasons*



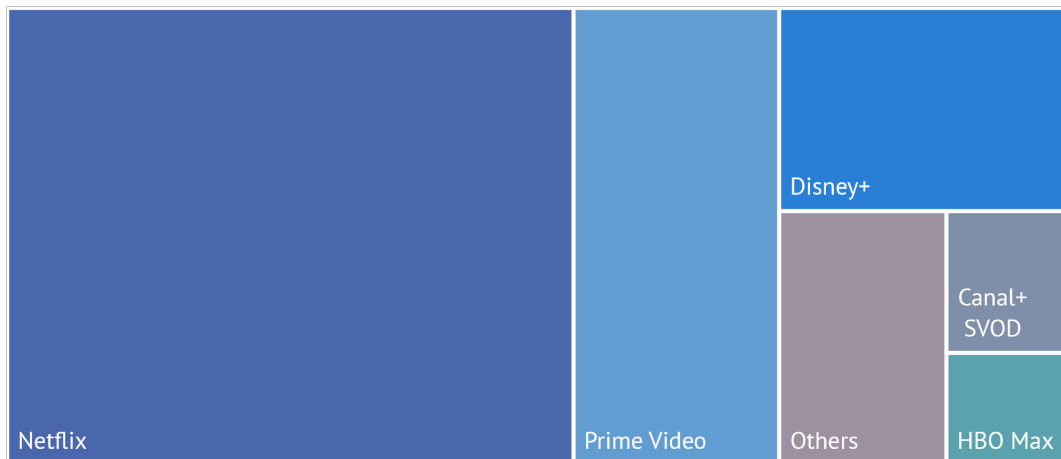
Source: OBS based on Goldmedia data

### 3 providers accounted for almost 85% of the SVOD viewtime

- In line with their share of subscribers in Europe, the three most popular services accounted for 85% of SVOD viewing time during the time period; Netflix with 53.4% of total viewing time, Amazon Prime Video with 19.4% and Disney+ with 12.1%.
- Five services accounted for more than 1% of total viewing time; Canal+ SVOD with 3.5%, HBO Max with 2.8%, Sky Go, Viaplay and Movistar SVOD with 1%
- All other services accounted for less than 0.58% of total viewing time, ranging from Vodafone TV with 0.58% to five services which accounted for less than 0.01% (Filmo TV, SFR Play, realez.tv, NPO Plus and SF Anytime).

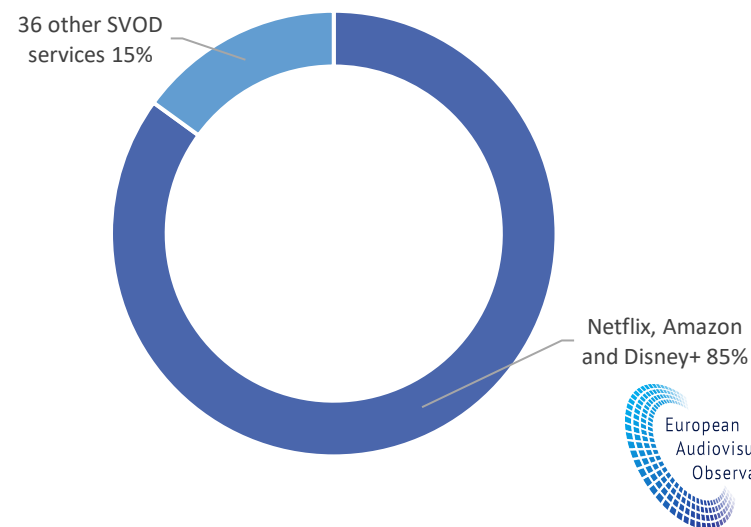
Viewtime by SVOD service  
EU9, Sept. 2022-Sept. 2023

■ Netflix ■ Prime Video ■ Disney+ ■ Canal+ SVOD ■ HBO Max ■ Others



Source: OBS based on Goldmedia data

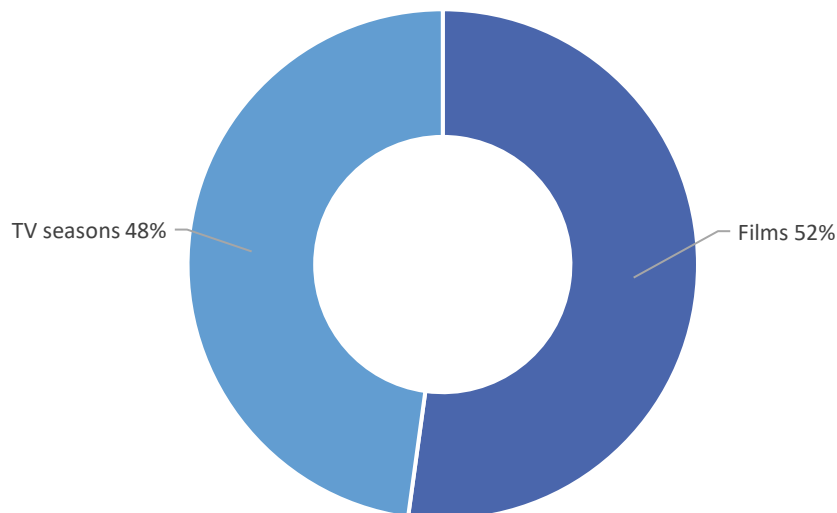
Split of total viewtime – top 3 services and the rest  
*In share of total viewtime Sept.2022 – Sept. 2023*



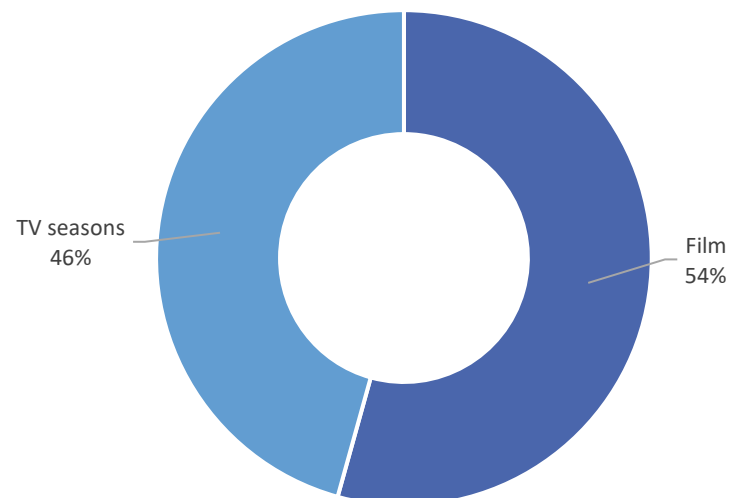
# Almost an equal split of viewtime between films and TV seasons

- With longer running times than TV seasons, films accounted for 52% of total viewtime on SVOD services in the nine EU countries.
- For EU27 works, films had an even higher share with 54% of total viewtime.

Split of viewtime between all films and TV seasons in EU9  
*In % of total viewtime for films and TV seasons*



Split of viewtime between EU27 films and EU27 TV seasons in EU9  
*In % of total viewtime for films and TV seasons*



Source: OBS based on Goldmedia data

# Main findings

## Concentration is one of the main characteristics of VOD usage in Europe

- **Concentration of services**, with three SVOD services (Netflix, Prime Video and Disney+) accounting together for 85% of view time.
- **Concentration of genres**, with fiction works accounting for 87% and 95% of view time of film and TV seasons.
- **Concentration of recent films** (produced in 2022 and 2023), with recent films accounting for 25% of all film view time (and 33% for EU27 films) but only 1% of all films available in SVOD catalogues.
  - However, even considering the strong weight of these three services, viewing on **SVOD is more diverse than admissions in cinemas**: the **top 100 titles account for 22% of SVOD viewing**, while they represent about **74% of cinema admissions**.
- SVOD viewing is almost equally split between films (not necessarily theatrically released in the European Union) and TV content.
  - But each segment presents quite different characteristics: **film usage on SVOD is much less concentrated than TV content usage**; originals commissioned by the streamers get a much more significant viewing share for TV content (close to 60%) than for films (less than 25%); whereas animation and documentary works generally account for a smaller share of viewing than their share in catalogues, the gap is wider for TV content than for films.
- Even if the limited number of EU countries in the sample (9) does not allow for a proper typology, **nuances appear between countries, in particular in terms of genres**, with Germany more geared towards TV series, and, conversely, Denmark more geared towards films. But overall, **consumption patterns are similar across all countries**.

## Differences exist in the regions of origin of works viewed in the 9 EU countries

- Differences between film and TV content are even more apparent when considering the origin of works.
- Overall, **European works account for 30% of SVOD view time**, including 21% for EU works, 9% for United Kingdom works and 1% for other European works, with **a slightly higher share for films than for TV series**, and **a higher share for documentaries than for fiction or animation**.
  - But figures significantly vary between Spain, Italy and Poland, with more viewing dedicated to European content, and Sweden and Denmark more geared towards US works.
- Beyond European and US works, of note is the **modest weight of consumption for works coming from other regions of the world** (8%, well under their share of catalogues), but **much higher for animated TV series (26%) driven by Japanese anime TV series**. Animation illustrates the fact that some categories of programmes need to be highly represented in catalogues to trigger subscription, even if they are actually under-consumed.
- While, for TV content, the **share of European and EU TV content view time (29%) is roughly aligned with its share in the catalogues (33%), European and EU films appear to be under-consumed (33% of view time vs. 43% of catalogues)**.
  - The gap between share of view time and share in catalogues concerns in particular French and Italian films; conversely, Spanish, German, Danish and Polish\* films perform better than their share of catalogues.
  - The viewing of Spanish, Polish and Irish TV content has been also boosted beyond their share of catalogues thanks to streamer originals.

\*The high share of Polish films and TV series is mainly linked to Netflix originals.

## Proportionally more national content is viewed than EU non-national and other European content

- While **non-national European content** represents around one third of European works in SVOD catalogues, when **viewing European content consumers turn proportionally more to national content (about 40%)**, the rest being almost equally split between EU non-national and United Kingdom content.
- Conventional wisdom according to which **high-production countries rely more on their national works does not fully apply regarding SVOD usage.**
  - As regards **films, France, Italy, Spain and Poland follow this pattern**, but not Germany.
  - But as regards TV series, the **share of national content seems to be chiefly driven by the investments of streamers in local originals** (e.g. in Spain and to a lesser extent in Denmark, Sweden and Italy).
- Overall, in terms of usage, SVOD, as regards films, relies **primarily on films meant for theatrical releases**, and therefore matches approximately the **structure of the cinema admissions market but provides more opportunities for European films to reach a significant audience.**
- In turn, the **usage of TV content on SVOD primarily reflects the level of investments of streamers in local TV series distributed across Europe** and therefore has brought new opportunities for comparatively smaller production countries.
- When comparing their share in catalogues and viewtime, **US works are systematically overconsumed and European works underconsumed.** However, among European works, national works are over consumed in 7 out of the 9 countries of the sample, whereas EU non-national works are underconsumed in all countries.

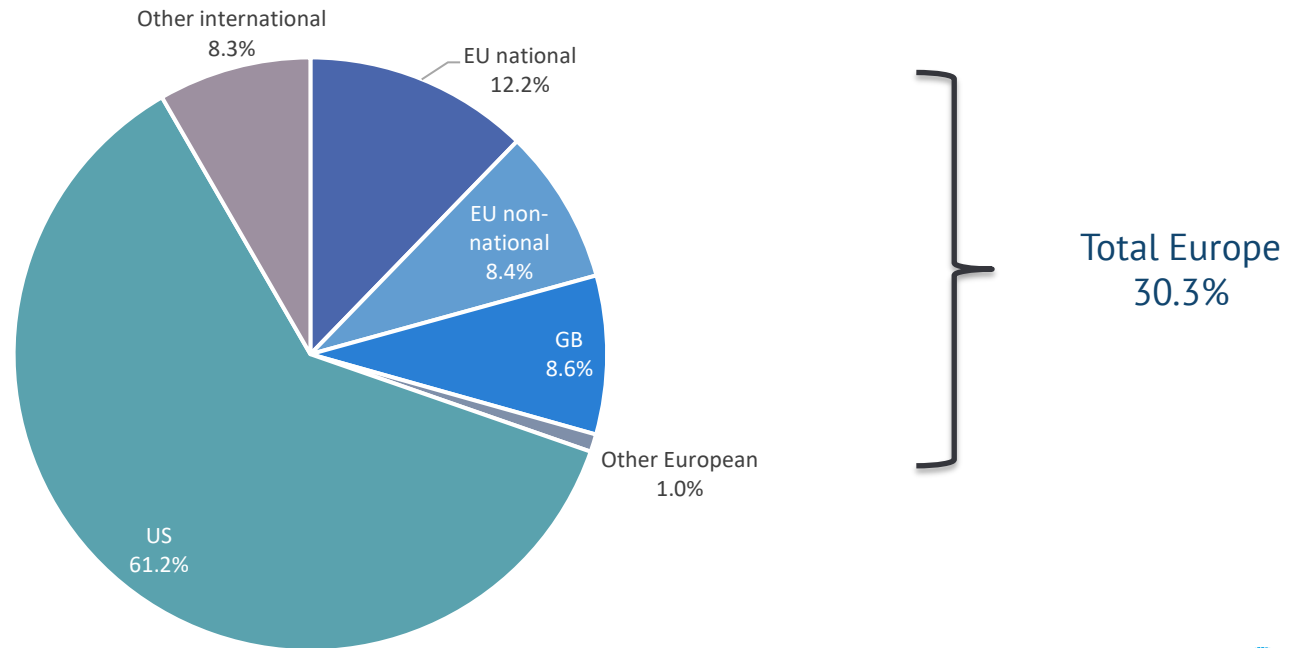


# Part 1: The *SVOD* viewing landscape in 9 EU countries in 1 year

# Viewtime of European works accounts for 30% of total viewtime

- Viewtime of European content (EU27+GB+Other European) accounted for 30.3% of total hours European SVOD subscribers watched in the nine EU countries.
- EU national works were more watched than EU non-national and British works.
- Unsurprisingly, US works represented 61.2% of total hours watched, with other international works accounting for 8.2%.

Viewtime of all works (films and TV seasons) in EU9 on SVOD services  
*In % of total viewtime in hours by region of origin*

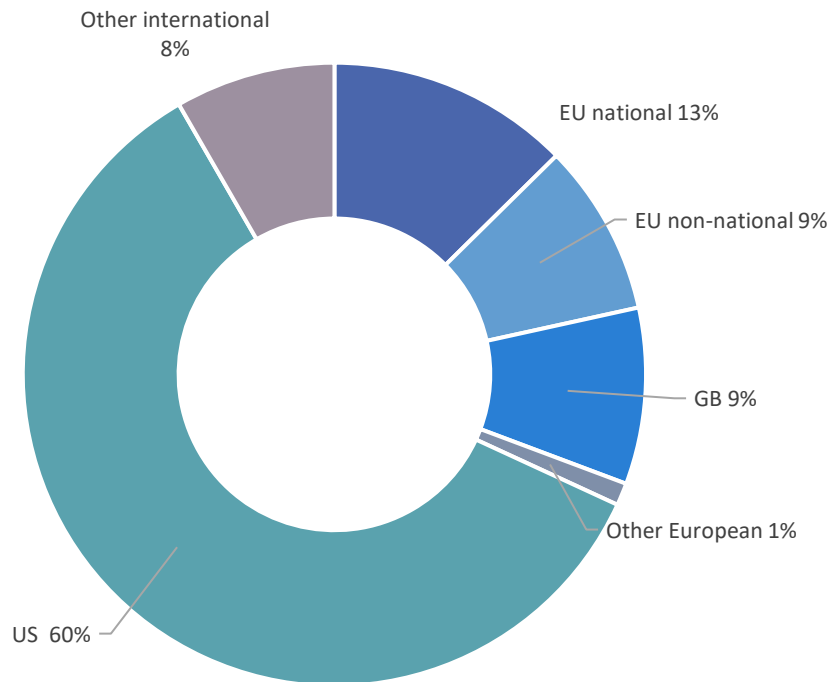


Source: OBS based on Goldmedia data

# European films have a slightly higher share of viewtime than TV seasons

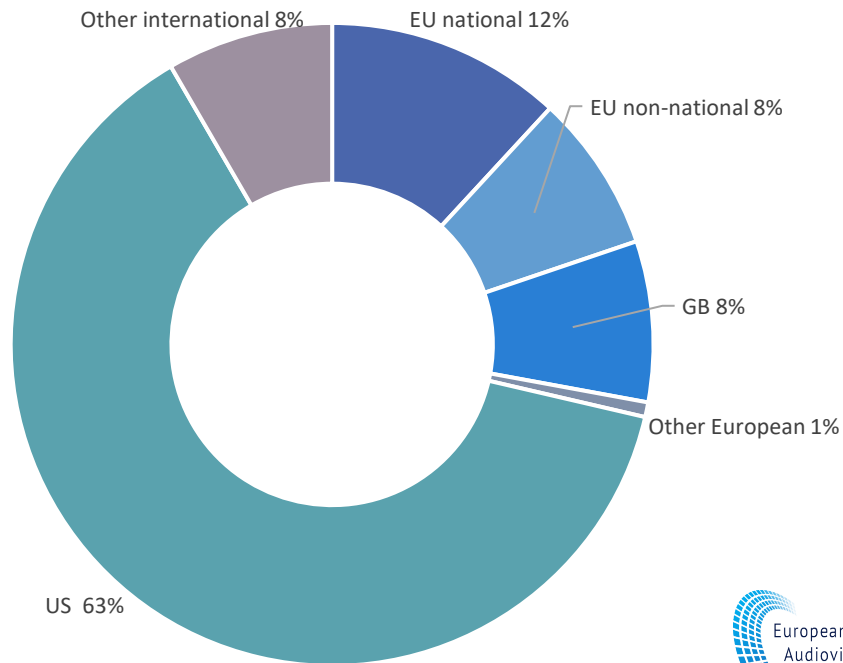
- With 32% of total viewtime of films, European films have a slightly higher share of total viewtime than European TV seasons with 29% of total viewtime of all TV seasons.
- For European films and TV seasons, national works were more watched than other works of other European origin.
- US TV seasons accounted for 63% of total viewtime and US films for 60%.
- Other international works accounted for 8% both for film and TV seasons.

Viewtime of all films in EU9 on SVOD services  
*In % of total viewtime in hours by region of origin*



**Share of total viewing time of European works:**  
**Films 32%**  
**TV seasons 29%**

Viewtime of all TV seasons in EU9 on SVOD services  
*In % of total viewtime in hours by region of origin*

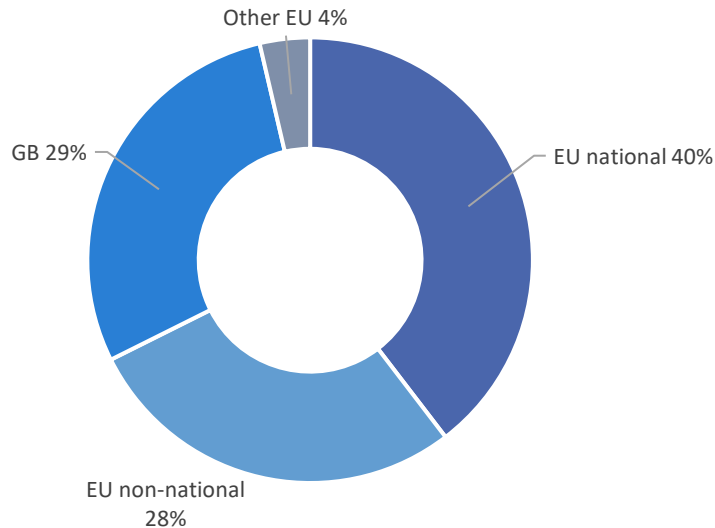


Source: OBS based on Goldmedia data

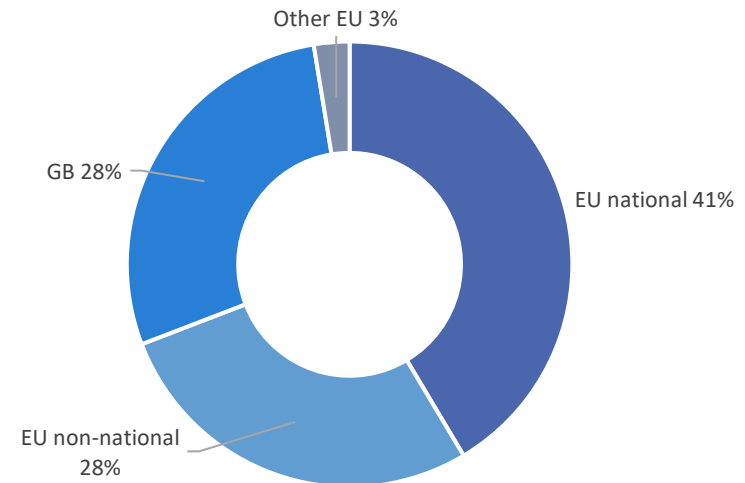
# National works has slightly higher share than other European works in SVOD consumption

- When all nine EU countries are considered, national works had the biggest share for films and TV seasons.
- However, on a country-to-country basis, stark differences appear:
  - For films, subscribers watched (in hours) more non-national films than national films in DK, FI, NL and SE.
  - For TV seasons, subscribers watched (in hours) more non-national TV seasons than national ones in FR, DE, NL.

Split of viewtime European films  
*In % of total viewtime in hours, EU9*



Split of viewtime European TV seasons  
*In % of total viewtime in hours, EU9*

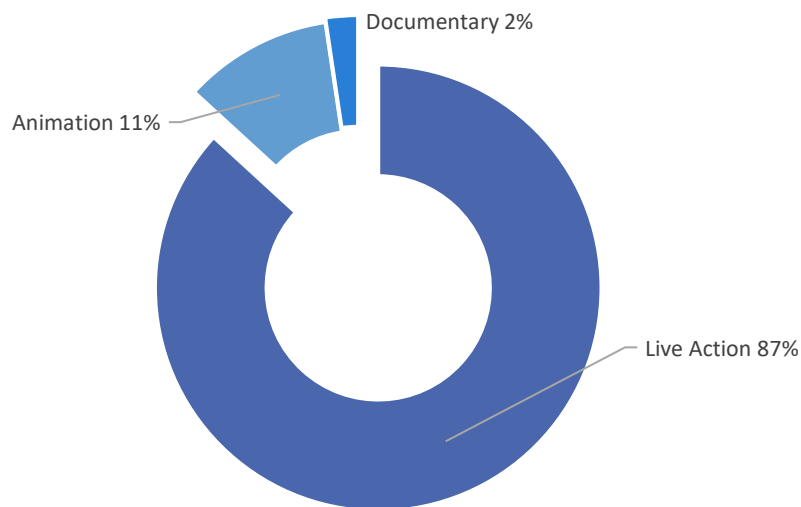


Source: OBS based on Goldmedia data

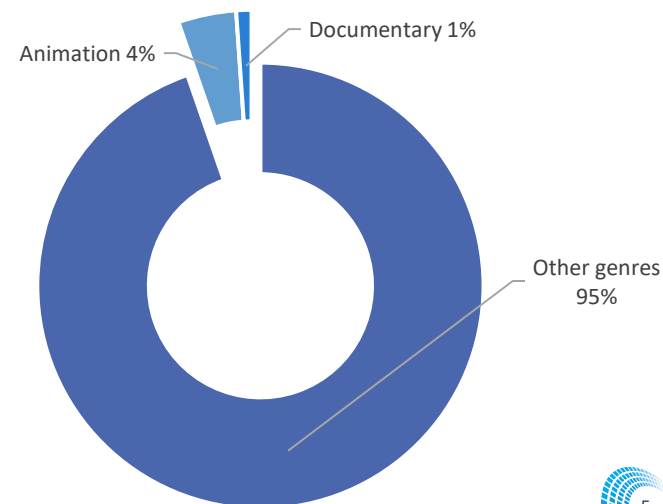
# Viewers watched mostly live action films and TV series

- Unsurprisingly, mostly live action films and other TV series (drama, action, etc) were watched by European viewers, live action films accounting for 87% of total viewing time (and live action films, representing 85% of films in the SVOD catalogues, plus all other TV series accounting for 95% of TV viewing time but only 73% of TV seasons in catalogues).
- Documentaries on the other hand accounted for 2% of film viewing (and accounted for 9% of all films in the SVOD catalogues) and 1% of TV season viewing (and accounted for 10% of all TV seasons in the catalogues).
- The share of animation in the viewing of films, at 11% of total viewtime, is in line with the share of animation films in the sample. For animated TV seasons, the share of total viewing time, 4%, is well below the share of animation in TV seasons in SVOD catalogues at 17%.

Films - Split of viewtime by genre  
*In % of total viewtime in hours, EU9*



TV seasons - Split of viewtime by genre  
*In % of total viewtime in hours, EU9*

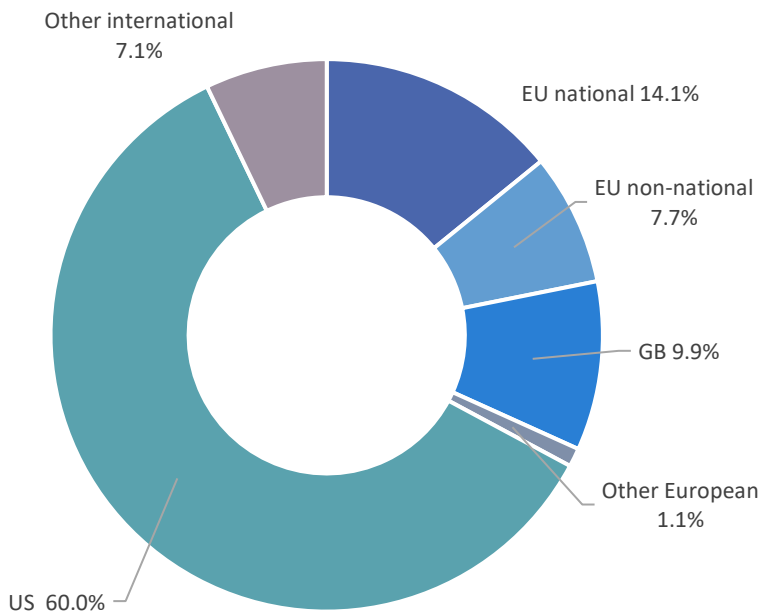


Source: OBS based on Goldmedia data

# Live action – Share of viewing for national European works is higher than its share in catalogue

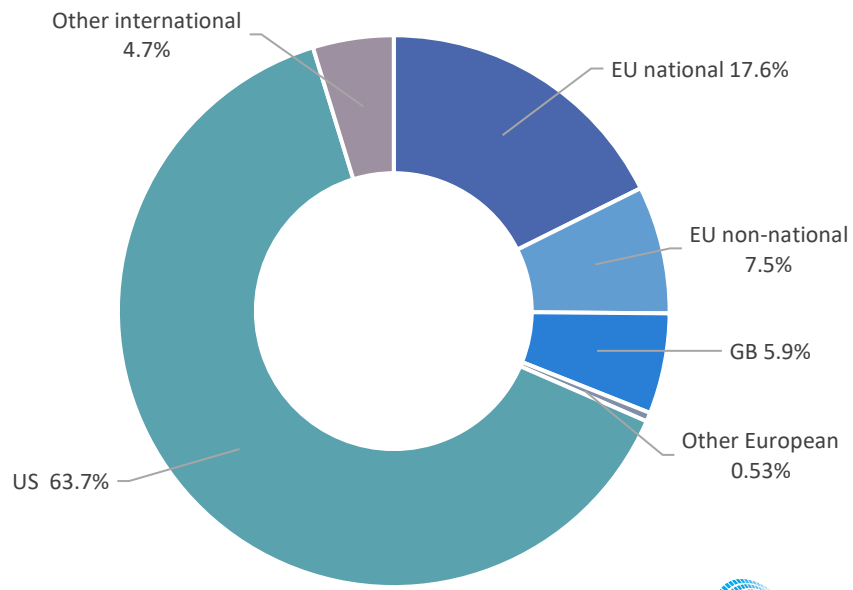
- Both for films and TV series, EU viewers watched more national films and TV series than EU non-national, on average in the EU 9 (stark differences by country exist).
- For live action films, European films totalled 32.8% of total viewing time (and represented 43.1% of all live action films in the catalogue). US live action films accounted for 60% of all viewing (and 40% of the films in the catalogue) and other international films made up 7.1% of viewing (and 16.5% of films).
- European TV seasons made up 31.5% of total view time (and 34% in the TV season catalogue), with a preference for national TV series when it comes to European series. US TV series accounted for 63.7% of total viewing time (and 51% of all other TV seasons in the sample).

Films - Live action - Split of viewtime by origin  
In % of total viewtime in hours, EU9



TV seasons - Other genres - Split of viewtime by origin  
In % of total viewtime in hours, EU9

**Share of total viewing time of European works:**  
**Films 32.8%**  
**TV seasons 31.5%**

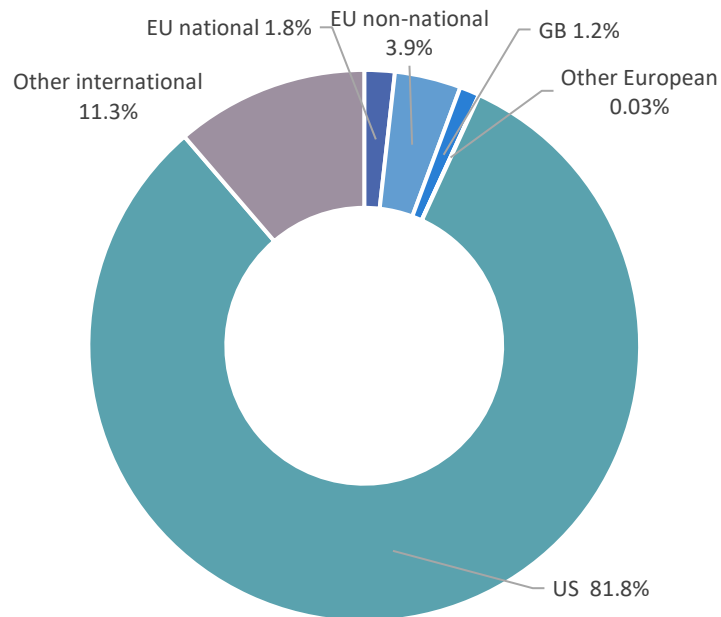


Source: OBS based on Goldmedia data

# Animation – US films and US and international TV series account for the bulk of viewing time

- Be it for films or TV series, US animated works account for the lion's share of viewing time with 81.8% of viewing time of films and 63% of TV seasons (and accounting for 53% of animation films and 50% of animation TV seasons in the catalogues).
- European animation films totalled only 6.9% of viewing time while representing 26% of animation films in the catalogues; for TV seasons, European animation accounted for 10.7% and represented 24% of animation TV seasons in the catalogue.
- International animation accounted for 26.3% of viewing of animation TV seasons (and 26% of animation seasons in the sample), mainly Japanese anime series. International animation films, with 11.3% of viewing time, totalled less than their share of animation films with 21% of all animation films in the catalogue.

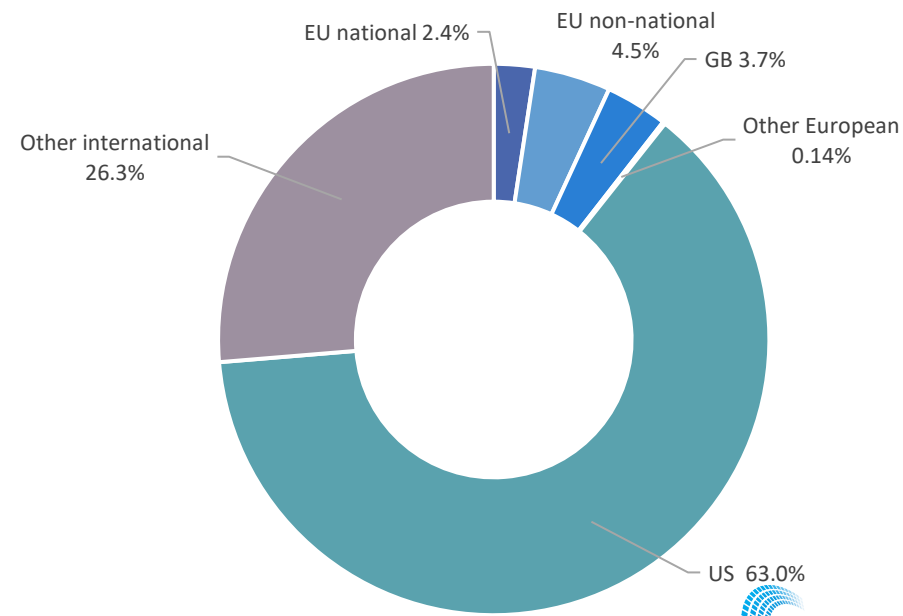
Films - Animation - Split of viewtime by origin  
In % of total viewtime in hours, EU9



**Share of total viewing time of European animation works:**

**Films 6.9%**  
**TV seasons 10.7%**

TV seasons Animation - Split of viewtime by origin  
In % of total viewtime in hours, EU9

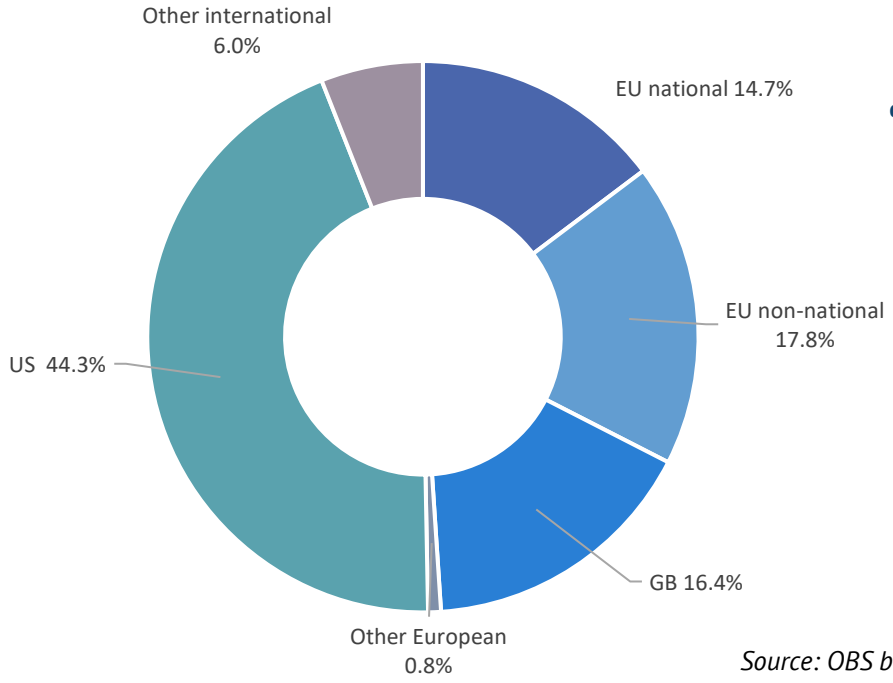


Source: OBS based on Goldmedia data

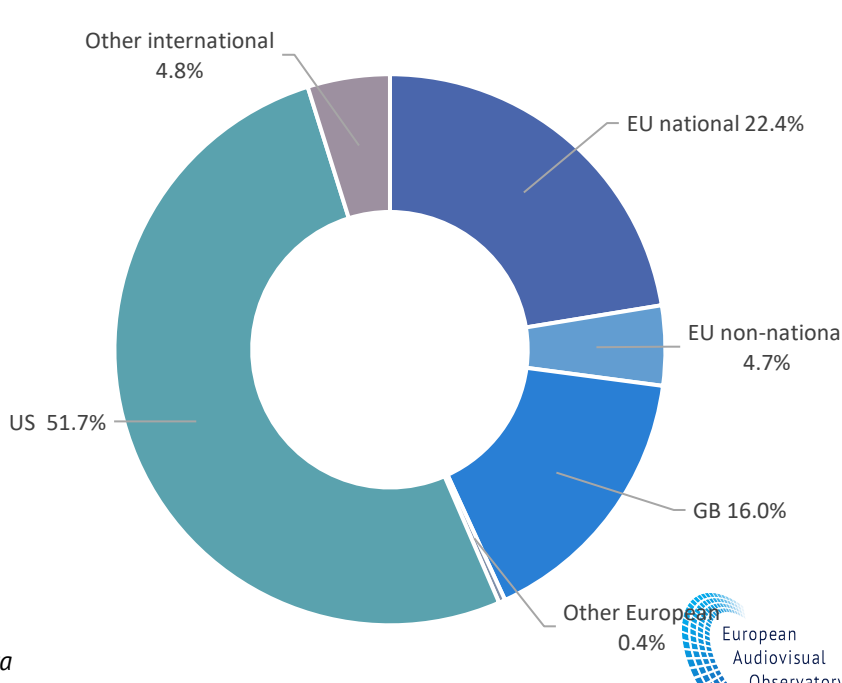
# Documentaries – A higher share of viewing time than other genres for European works

- European viewers preferred mainly to watch European documentary films with 49.7% of total documentary viewing time (and accounting for 55% of documentary films in the catalogues). British documentary films accounted for 16.4% of documentary film viewing time, followed by national documentary films with 14.7%.
- When it comes to TV documentaries, US documentaries accounted for 51.7% of total documentary TV viewing time (and 47% of documentary TV seasons in the catalogues), followed by European documentary TV seasons with 43.5% of viewing time (and 43% of documentary TV seasons in the catalogue). Notably, for European documentary TV seasons, viewers watched more national documentaries with 22.4% of total viewing time.

Films - Documentary - Split of viewtime by origin  
In % of total viewtime in hours, EU9



TV seasons - Documentary - Split of viewtime by origin  
In % of total viewtime in hours, EU9



**Share of total viewing time of European documentary works:**  
**Films 49.7%**  
**TV seasons 43.5%**

Source: OBS based on Goldmedia data

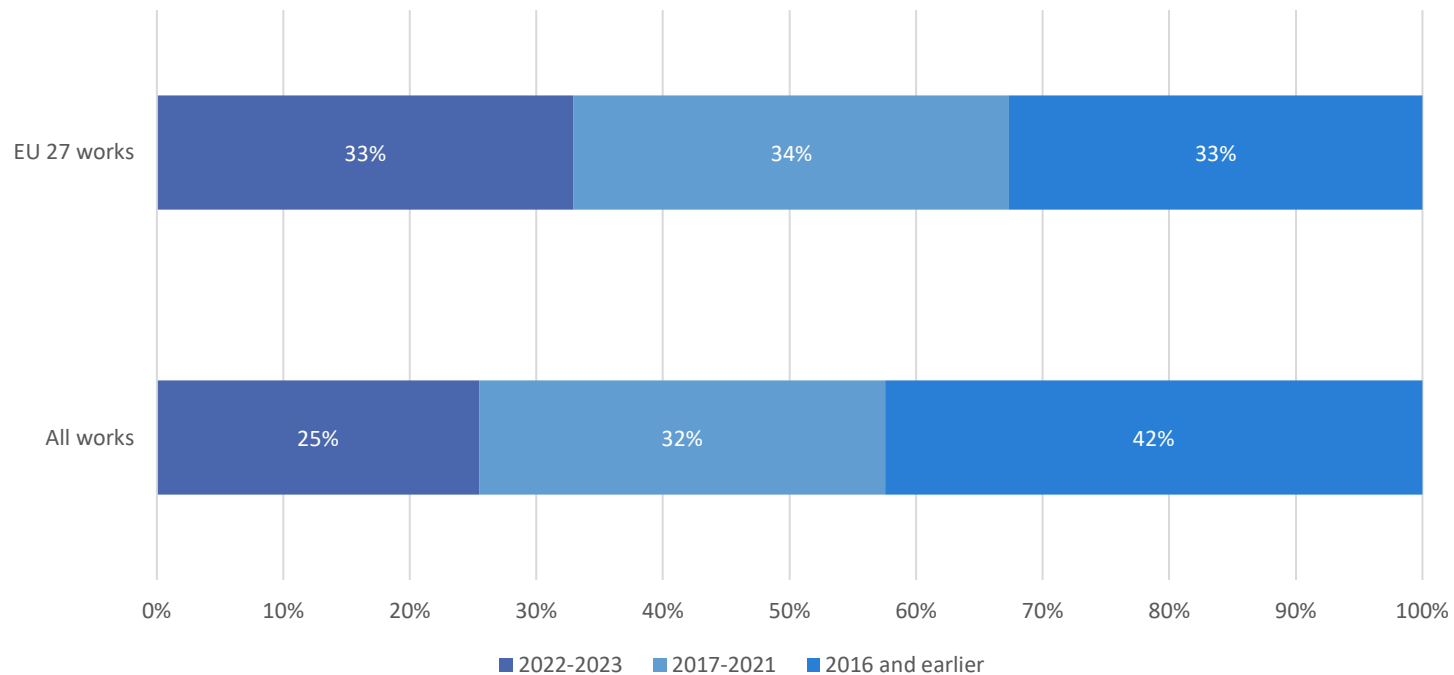




# Recent films are proportionally more viewed than their share in catalogues

- Viewers prefer to watch more recent films. While films produced in 2022 and 2023 accounted for only 1% of all films in the sample, they totalled 25% of all film viewing time. For EU27 films, this is even more stark: with only 1% of all EU27 films, the viewing of recent EU27 films represented 33% of all EU27 film viewing.
- Films produced between 2017 and 2021 accounted for 32% of total viewing time and 7% of films in the sample (for EU27 films, their share represented 7% of all EU27 films).
- The catalogue film (2016 and earlier) share of viewing was significantly less than their share of films in the sample. For EU27 catalogues films, they accounted for 33% of EU27 film viewing time but made up 91% of all EU27 films in the sample.

Films - Split of viewtime by origin and by year of production  
*In % of total viewtime in hours, EU9*

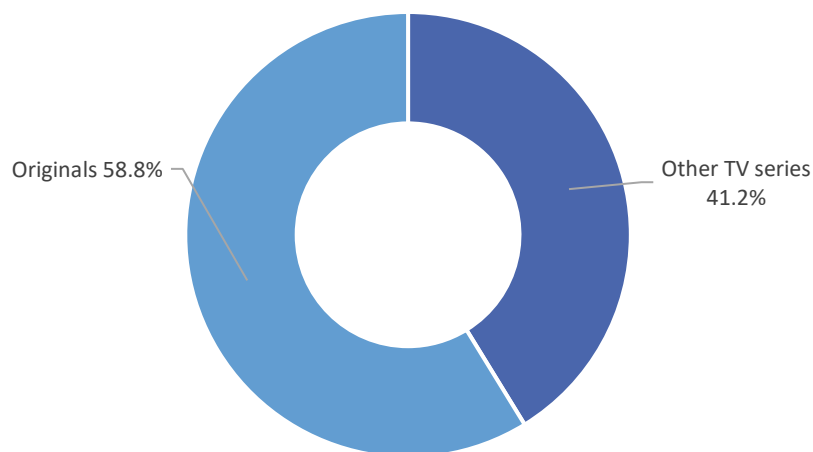


Source: OBS based on Goldmedia data

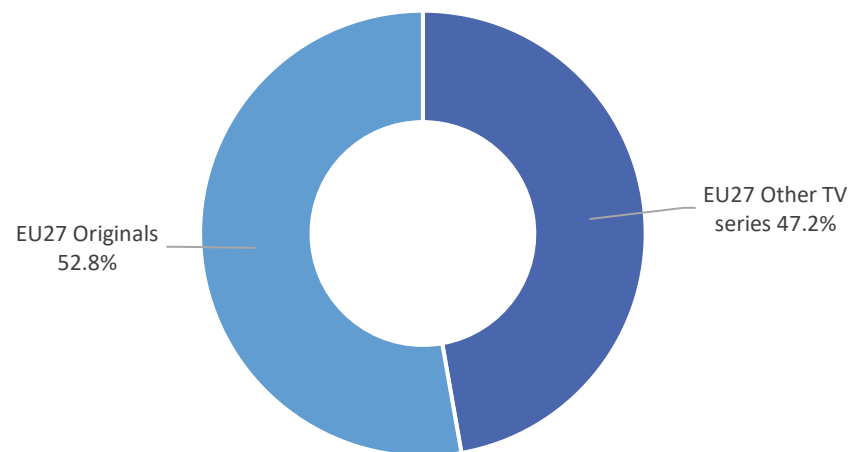
# Original TV seasons represent most of the TV season viewtime, for EU27 and all TV series

- The majority of viewtime for TV series is dedicated to original TV series, be it for all TV seasons or for EU27 TV seasons.
- The increased production of original TV series by major SVOD services such as Netflix and Amazon, coupled with the large percentage of viewtime these two services represent, explains this preference for original TV seasons.
- In fact, the top 10 list of TV seasons, for all works and EU27 TV seasons, only contains original productions.
- The top 100 list of TV seasons for works of all origins is made up of 85 original productions and for EU27 TV seasons of 68 original productions.

Split of viewtime all TV seasons - TV series  
In % of total viewtime in hours, EU9 original and non-original



Split of viewtime EU27 TV seasons - original and non-original TV series  
In % of total viewtime in hours, EU9

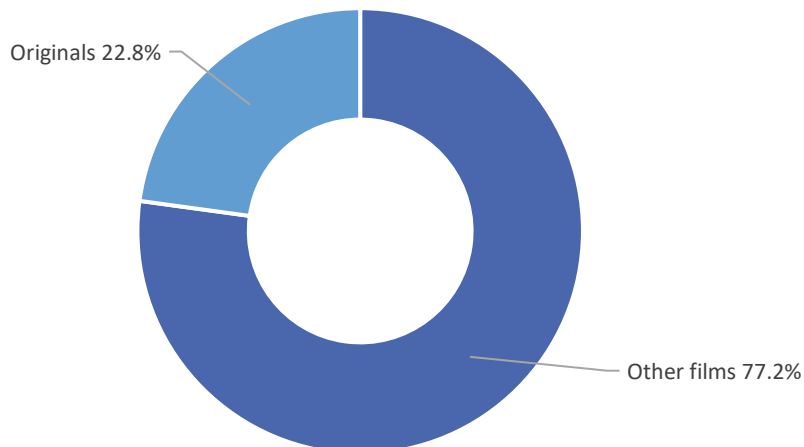


Source: OBS based on Goldmedia data

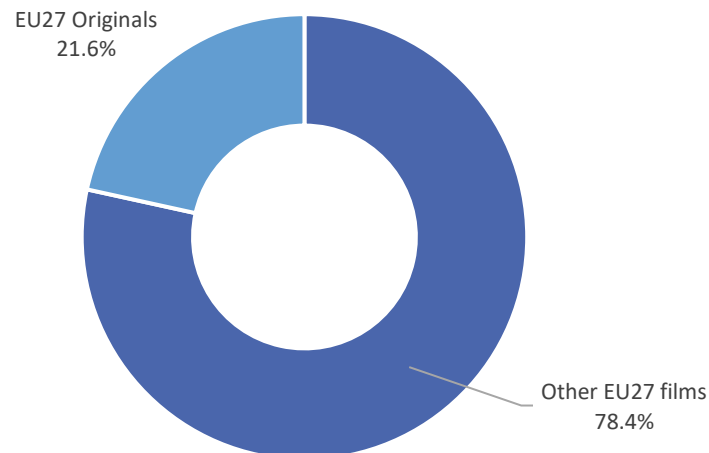
# Original films accounted for less than 25% of film viewing

- With fewer original films produced and available on SVOD services than original TV series, they account for 22.8% of all film viewing time and original EU27 films accounted for 21.6% of all EU27 film viewing time.
- The most watched films on SVOD services are often previously theatrical films (such as *Avatar 2* or *Encanto*) but also big budget original productions by streamers such as *All Quiet on the Western Front* or *Glass Onion: A Knives out Mystery*.
- 73 US films, mostly blockbusters, are in the top 100 list of films of all origins, 15 GB films, 10 EU27 films, and respectively 1 other European and other international film.

Split of viewtime all films - original and non-original films  
In % of total viewtime in hours, EU9



Split of viewtime EU27 TV films - original and non-original films  
In % of total viewtime in hours, EU9

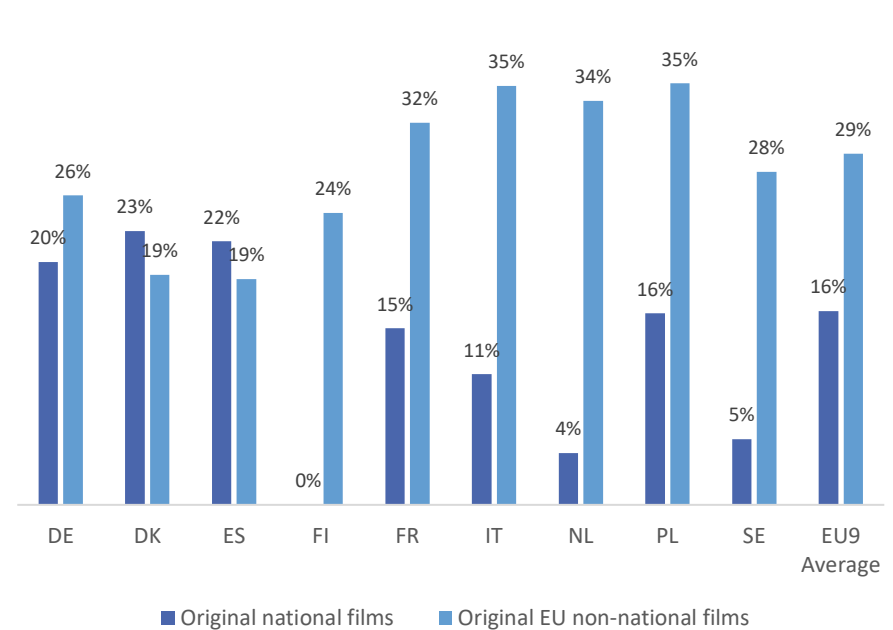


Source: OBS based on Goldmedia data

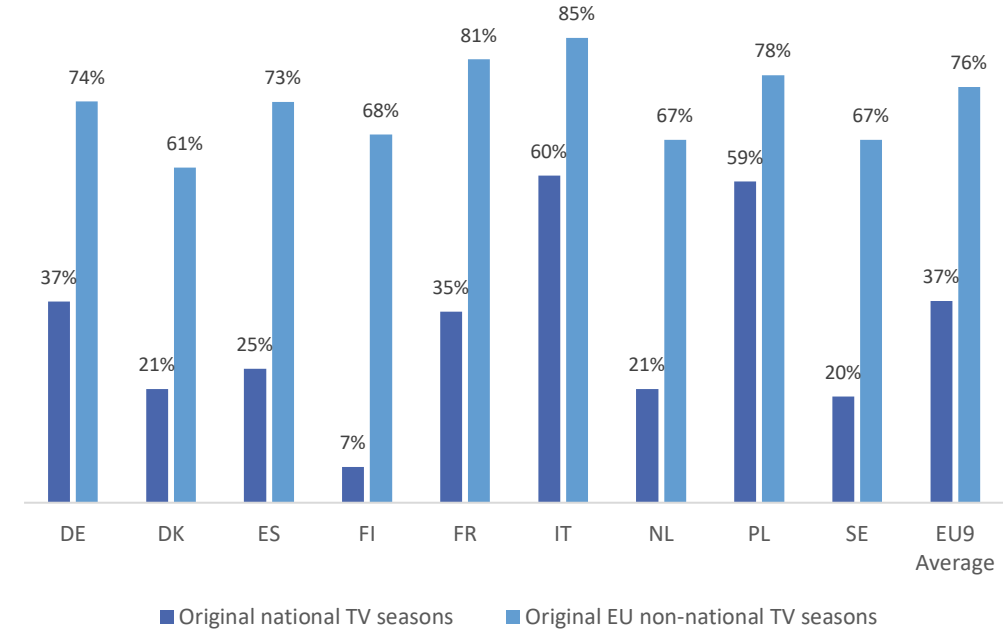
# Most of the view time for EU non-national TV seasons is generated through originals

- On average in the EU9, EU non-national original TV seasons accounted for 76% of EU non-national TV view time, showing that for TV seasons most of the EU non-national viewing time on the part of subscribers is attributable to streaming originals such as *1899*, *The Witcher*, *High Water*, *Money Heist* or *The Empress*.
- National original TV seasons on the other hand accounted for 37% of national TV view time on average in the EU9. Even with the increasing production of EU originals by streamers, many fewer national originals exist than EU non-national originals and therefore most of the viewing of national TV content is of non-original TV content on SVOD services.
- Unsurprisingly, for national and non-national films, most of the view time is attributable to non-original films.

Share of viewtime – National and EU non-national original films  
In % of national and non-national viewtime, by country



Share of viewtime – National and EU non-national original TV seasons  
In % of national and non-national viewtime, by country

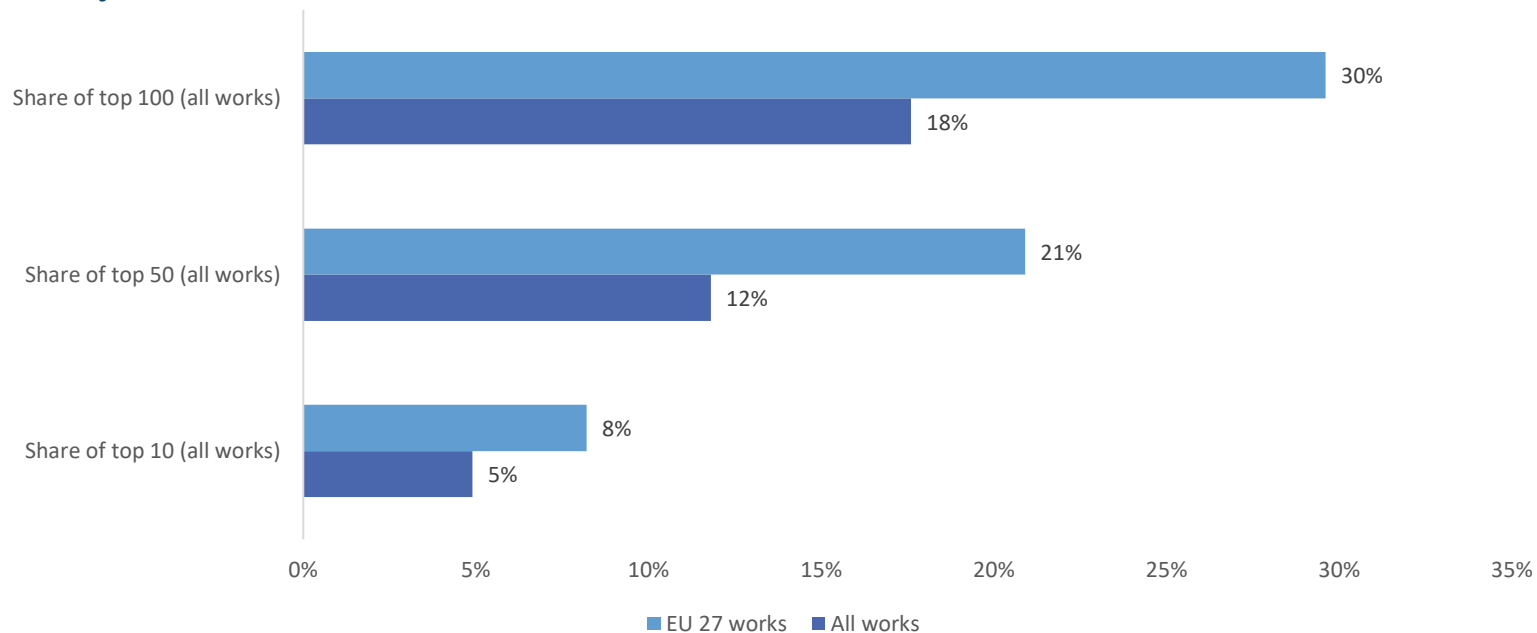


Source: OBS based on Goldmedia data

## Concentration – A small number of titles account for a large part of viewtime

- In total, in the one-year period, there were 46 680 unique work titles in the SVOD measurement, of which 9 490 were unique EU27 work titles.
- On SVOD, even with many titles available in catalogues, a relatively small number of titles accounted for a large percentage of viewtime: the top 100 works accounted for 18% of total viewtime in the nine EU countries.
- For the top 100 EU27 viewtime is even more concentrated as they accounted for 30% of total viewtime for EU27 works.

All works - Share of viewtime of the most watched works  
*In % of total viewtime in hours, EU9*

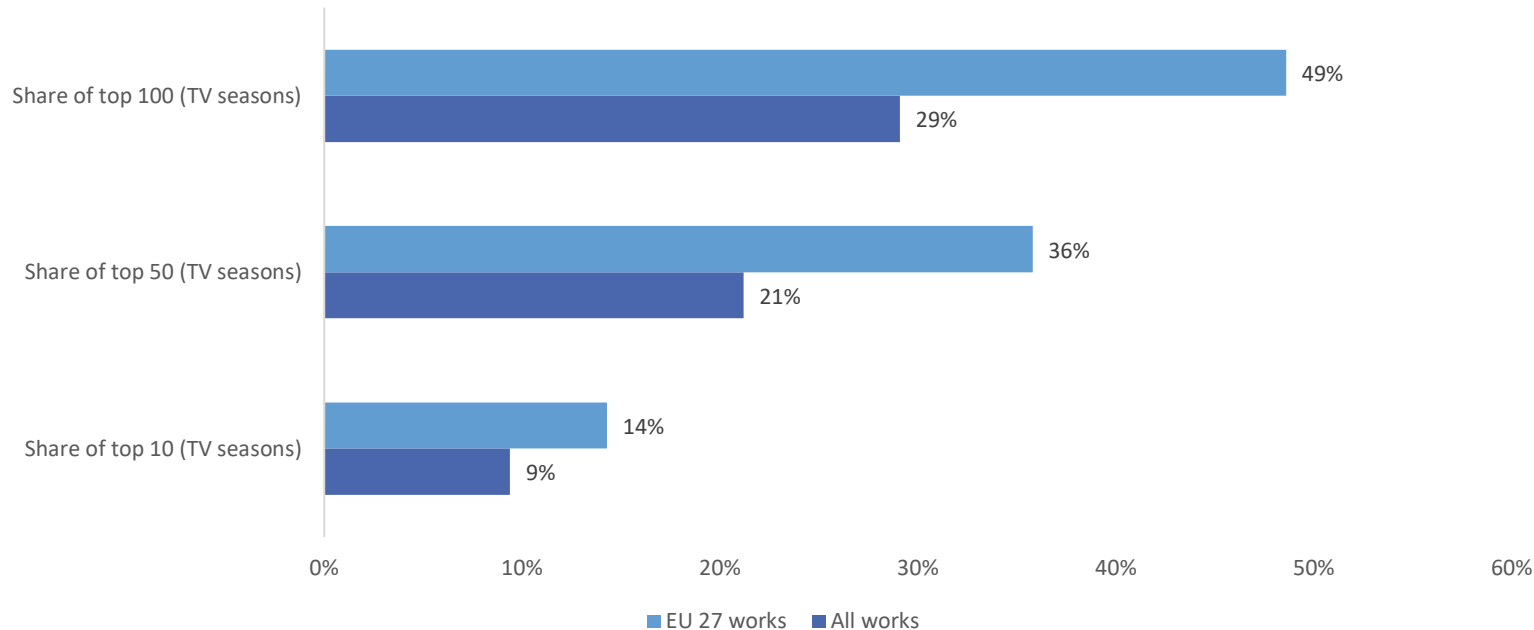


Source: OBS based on Goldmedia data

# Concentration – The top 100 EU27 TV seasons accounted for half of the viewtime of EU27 TV seasons

- 26 819 unique TV season titles were included in the SVOD measurement of which 4 570 unique EU27 TV season titles.
- Viewtime for TV seasons tended to be concentrated on selected TV seasons, mostly new releases of original TV seasons by streaming services.
- The top 100 TV seasons represented 29% of viewtime for TV seasons of all origins (with 66 US TV seasons) while the top 100 EU27 TV seasons accounted for 49% of viewtime of EU27 TV seasons.

TV seasons - Share of viewtime of the most watched  
*In % of total viewtime in hours, EU9*

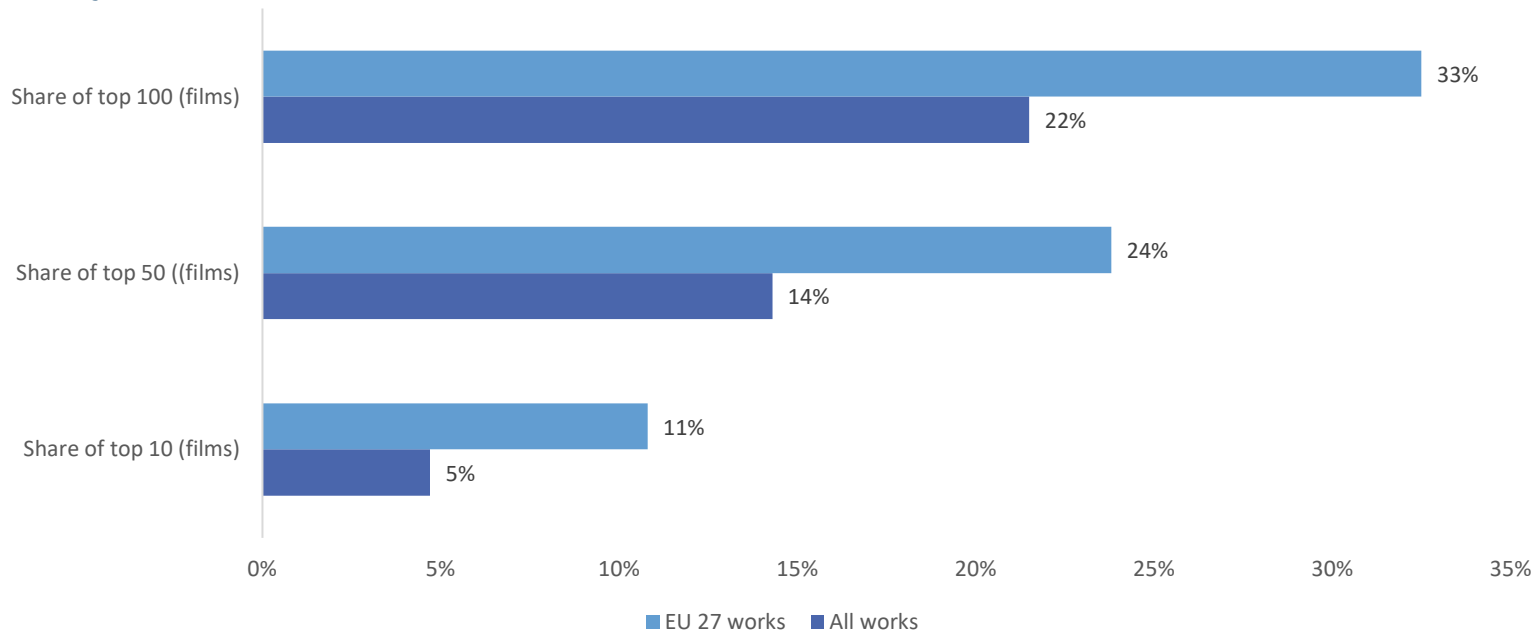


Source: OBS based on Goldmedia data

# Concentration – The top 100 EU27 films represented 1/3 of viewtime of EU27 films

- 21 861 unique film titles were included in the SVOD measurement of which 4 920 were unique EU27 film titles.
- Viewtime for films was less concentrated than for TV seasons with the top 100 films of all origins accounting for 22% of viewtime for films and the top 100 EU27 films accounting for 33% of viewtime of EU27 films.
- For films of all origins, 53 films out of the top 100 were produced in 2022 or 2023 and 15 before 2016.

Films - Share of viewtime of the most watched films  
*In % of total viewtime in hours, EU9*

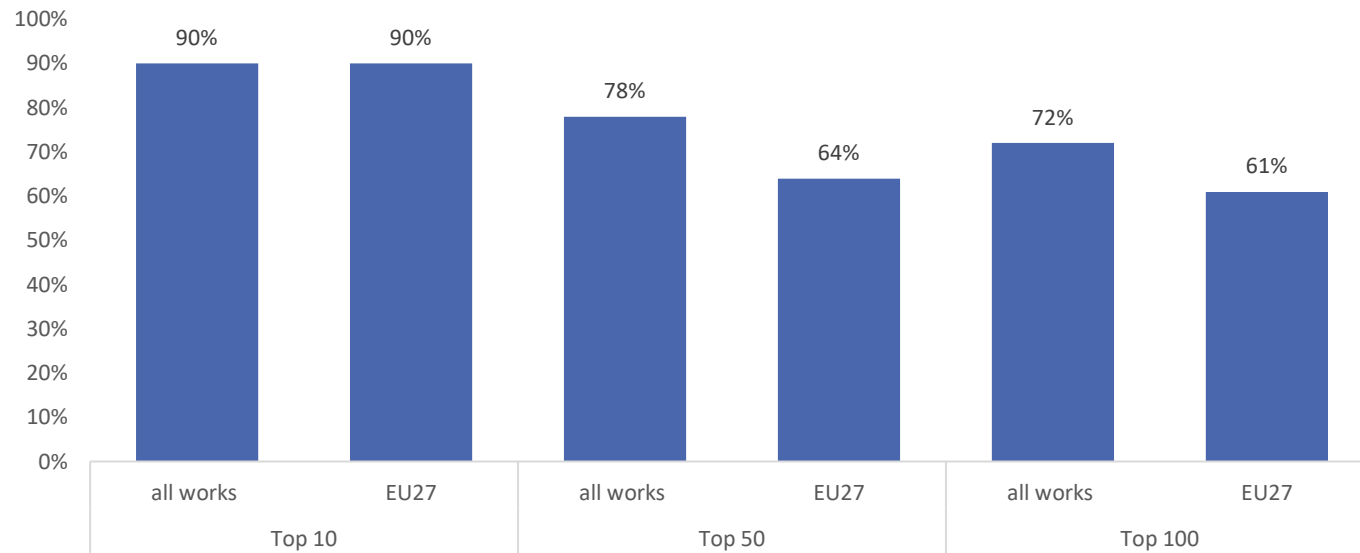


Source: OBS based on Goldmedia data

# Originals – Originals dominate the top lists of most-watched works

- Original works dominated the list of most-viewed content on SVOD services in the EU9.
- In the top 100 works with the most viewing time, originals accounted for 72% of works of all origins and 61% for works from the EU27 while the top 10 works were even more dominated by original works, with 9 out of the top 10 most-viewed works original streaming productions (the only non-streaming original was *Avatar 2*; for EU27 films, one was *365 Days*, and the other was *365 Days: This Day* – a Netflix original also in the top 10 EU27 film list).

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



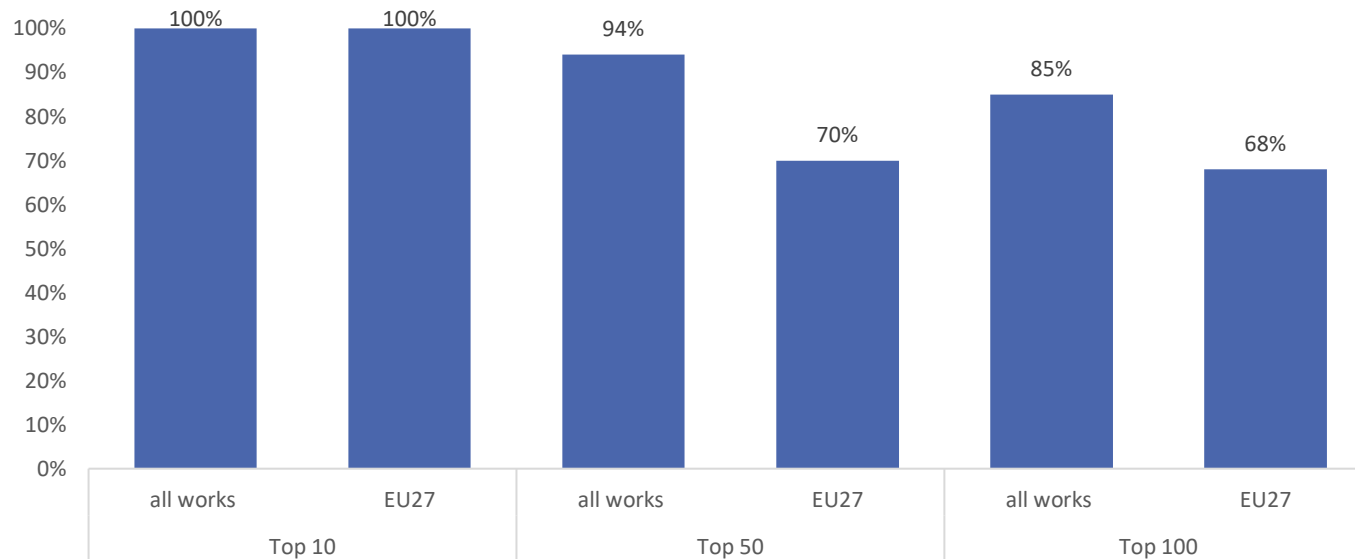
Source: OBS based on Goldmedia data



# Originals – Original TV seasons comprised the majority of the most-watched TV seasons

- Original TV seasons were the most-viewed TV seasons on SVOD services, with the 10 most-viewed TV seasons all original productions, for TV of all origins and EU27 TV seasons.
- In the top 100 TV seasons with the most viewing time, originals accounted for 85% of viewing time for TV seasons of all origins and EU27 originals accounted for 68% of viewing time of the top 100 EU27 TV seasons.

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

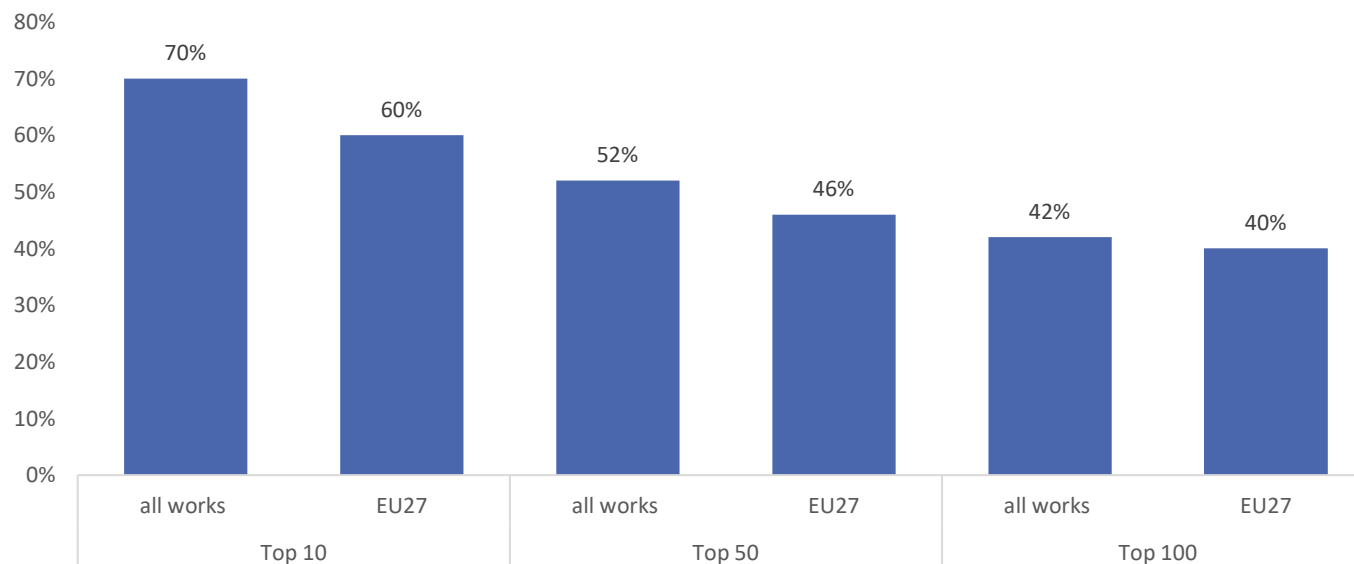


Source: OBS based on Goldmedia data

# Originals – Fewer original films in top list of the most watched EU27 films

- Original films are less represented in the top EU27 movies compared to the all-works top.
- In the top 100 films with the most viewing time, originals accounted for 42% of films of all origins and 40% of EU27 films.
- The most-viewed films were mainly theatrically released films and original streaming productions.
- The difference in the share of originals between the top 10 and top 100 lists comes on the one hand from the fact that there are fewer original films than TV series, and on the other hand that SVOD services tend to promote more intensively their original productions on their homepages.

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



Source: OBS based on Goldmedia data

# Concentration – All works top lists

All works – Top 10 all regions of origin  
*In total viewtime in hours, EU9*

Rank	Original work title	Type	Year	First production country	Region	Original
1	Wednesday S1	TV	2022	US	US	yes
2	The Lord of the Rings: The Rings of Power S1	TV	2022	US	US	yes
3	Dahmer - Monster: The Jeffrey Dahmer Story S1	TV	2022	US	US	yes
4	Avatar 2	Film	2022	US	US	no
5	House of the Dragon S1	TV	2022	US	US	yes
6	Stranger Things S4	TV	2017	US	US	yes
7	All Quiet on the Western Front	Film	2022	DE	EU27	yes
8	Glass Onion: A Knives Out Mystery	Film	2022	US	US	yes
9	The Last of Us S1	TV	2023	US	US	yes
10	Manifest S4	TV	2018	US	US	yes

All works – Top 10 EU27  
*In total viewtime in hours, EU9*

Rank	Original work title	Type	Year	First production country	Region	Original
1	All Quiet on the Western Front	Film	2022	DE	EU27	yes
2	1899 S1	TV	2022	DE	EU27	yes
3	The Witcher S2	TV	2019	PL	EU27	yes
4	The Witcher S3	TV	2019	PL	EU27	yes
5	Culpa mía	Film	2023	ES	EU27	yes
6	365 Days	Film	2020	PL	EU27	no
7	High Water S1	TV	2022	PL	EU27	yes
8	The Witcher S1	TV	2019	PL	EU27	yes
9	Money Heist S5	TV	2017	ES	EU27	yes
10	Fate: The Winx Saga S2	TV	2021	IT	EU27	yes

Source: OBS based on Goldmedia data

# Concentration – Film top lists

Film– Top 10 all regions of origin

*In total viewtime in hours, EU9*

Rank	Film title	Year	First production country	Region	Original
1	Avatar 2	2022	US	US	no
2	All Quiet on the Western Front	2022	DE	EU27	yes
3	Glass Onion: A Knives Out Mystery	2022	US	US	yes
4	Encanto	2021	US	US	no
5	Avengers: Endgame	2019	US	US	no
6	The Mother	2023	US	US	yes
7	Enola Holmes 2	2022	GB	GB	yes
8	The School for Good and Evil	2022	US	US	yes
9	El Camino: A Breaking Bad Movie	2019	US	US	yes
10	Extraction 2	2023	US	US	yes

Films– Top 10 EU27

*In total viewtime in hours, EU9*

Rank	Film title	Year	First production country	Region	Original
1	All Quiet on the Western Front	2022	DE	EU27	yes
2	Culpa mía	2023	ES	EU27	yes
3	365 Days	2020	PL	EU27	no
4	365 Days: This Day	2022	PL	EU27	yes
5	Money Heist: The Phenomenon	2020	ES	EU27	yes
6	Uncharted	2022	ES	EU27	no
7	Dziewczyny z Dubaju	2021	PL	EU27	no
8	Los renglones torcidos de Dios	2023	ES	EU27	no
9	Athena	2022	FR	EU27	yes
10	Bird Box Barcelona	2023	ES	EU27	yes

Source: OBS based on Goldmedia data

# Concentration – TV seasons top lists

TV seasons– Top 10 all regions of origin  
*In total viewtime in hours, EU9*

Rank	Original TV title	Year	First production country	Region	Original
1	Wednesday S1	2022	US	US	yes
2	The Lord of the Rings: The Rings of Power S1	2022	US	US	yes
3	Dahmer - Monster: The Jeffrey Dahmer Story S1	2022	US	US	yes
4	House of the Dragon S1	2022	US	US	yes
5	Stranger Things S4	2017	US	US	yes
6	The Last of Us S1	2023	US	US	yes
7	Manifest S4	2018	US	US	yes
8	You S4	2018	US	US	yes
9	The Crown S5	2017	GB	GB	yes
10	The Night Agent S1	2023	US	US	yes

TV seasons– Top 10 EU27  
*In total viewtime in hours, EU9*

Rank	Original TV title	Year	First production country	Region	Original
1	1899 S1	2022	DE	EU27	yes
2	The Witcher S2	2019	PL	EU27	yes
3	The Witcher S3	2019	PL	EU27	yes
4	High Water S1	2022	PL	EU27	yes
5	The Witcher S1	2019	PL	EU27	yes
6	Money Heist S5	2017	ES	EU27	yes
7	Fate: The Winx Saga S2	2021	IT	EU27	yes
8	Money Heist S1	2017	ES	EU27	yes
9	The Empress S1	2022	DE	EU27	yes
10	Money Heist S2	2017	ES	EU27	yes

Source: OBS based on Goldmedia data

# European works are more watched on European SVOD services

Share of viewtime of EU27 works in total viewtime by SVOD service

*In % of total viewtime in hours*

Provider	Share of viewtime of EU works
FlixOlé	88%
Mitele Plus	75%
MUBI	73%
TV2 Play	56%
Movistar+ SVOD	48%
Videoland	47%
Lionsgate+	46%
Atres Player Premium	44%
Orange VOD	41%
realeyz.tv	41%
Vodafone Videothek	40%
Canal+ SVOD	38%
Salto	38%
FILMIN	37%
NowTV	37%
Ruutu	36%
Vodafone TV	35%
Sky Go	33%
Discovery+	32%
Infinity	32%
Cda Premium	31%
Magenta TV Megathek	31%
Rakuten TV	29%
FilmoTV/VideoFutur	26%
ViaPlay	26%
OCS	25%
TIMvision	23%
Prime Video	21%
Netflix	21%
10 services	under 20%

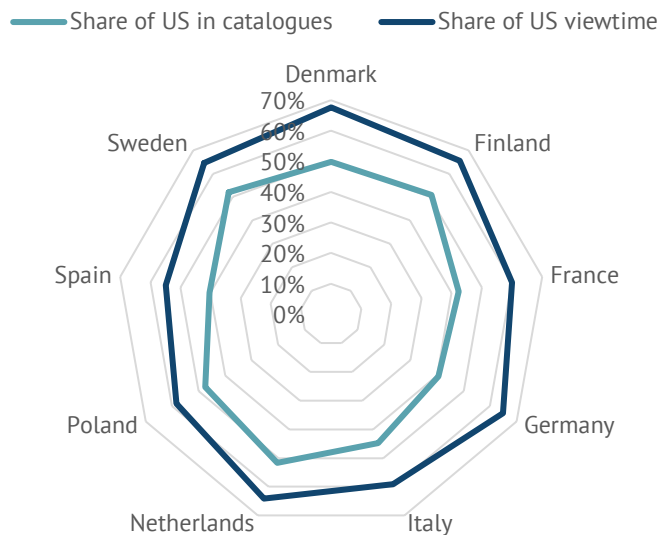
- Viewers watched a higher share of EU27 works on European and national services such as Spanish players FlixOlé, specialised in Spanish cinema, or TV 2 Play, operated by the public broadcaster TV 2 in Denmark.
- EU27 works accounted for 21% of total viewing time of subscribers to Netflix and Amazon Prime Video.
- In general, EU27 works represented a higher share of viewtime on national or European SVOD services.

Source: OBS based on Goldmedia data

## **Part 2: Comparison – share of catalogues and share of viewtime**

# US content is more watched than its share in catalogue in all countries

- While representing in average 45% of the catalogue, US content accounted for 61% of viewtime.
- US content was systemically more watched than its share in catalogue in the 9 countries of the sample.
- Germany was the country where the gap between viewing time and catalogue was the wider (+24% vs catalogue).
- Poland was the country where the gap between viewing time and catalogue was the smallest (+11% vs catalogue).



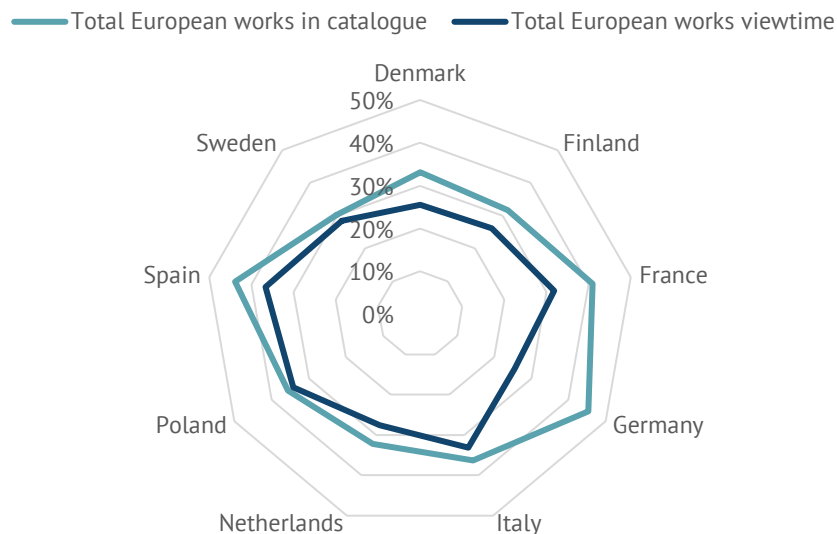
## Viewtime vs share of works in catalogue

*In total viewtime in hours and number of works, EU9*



# European content is less watched than its share in catalogue in all countries

- In the sample, European content (EU national + EU non-national + GB + Other European) accounted for 39% of the catalogue in the sample but only 30% of consumption.
- European content was systemically less watched in the 9 countries of the sample.
- Germany was the country where the gap between viewing time and catalogue was the wider (-20% vs catalogue).
- Poland and Sweden were the countries where the gap between viewing time and catalogue was the smallest (-2% vs catalogue).

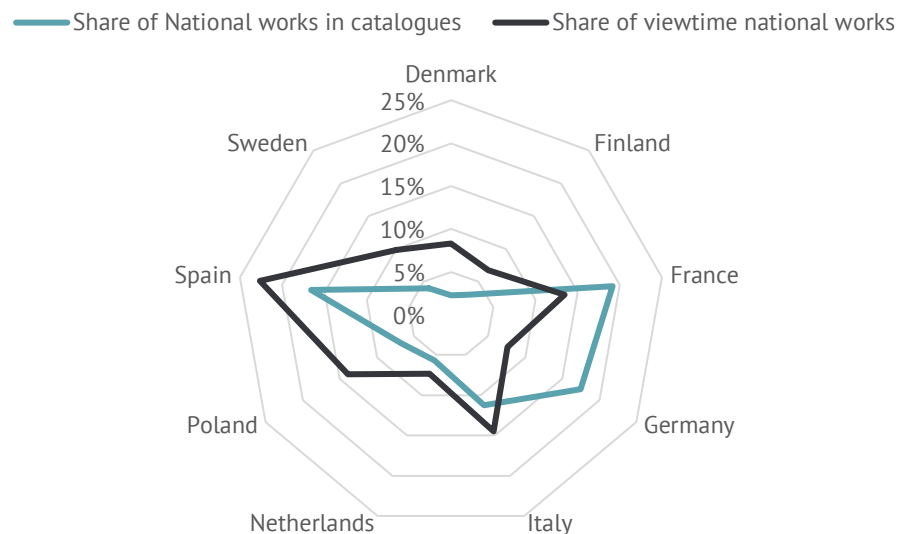


## Viewtime vs share of works in catalogue

*In total viewtime in hours and number of works, EU9*

# National content is more watched than its share in catalogue in 7 out of 9 countries

- National content consumption and share in catalogue was equal, accounting in both cases for 12%.
- France and Germany were the only two countries where the national content was the least consumed compared to their shares in catalogue (respectively 6% and 10% less).
- Poland was the country where the national content was the most consumed compared to its share in catalogue (+7%). Spain, Sweden and Denmark followed close behind (+6%).

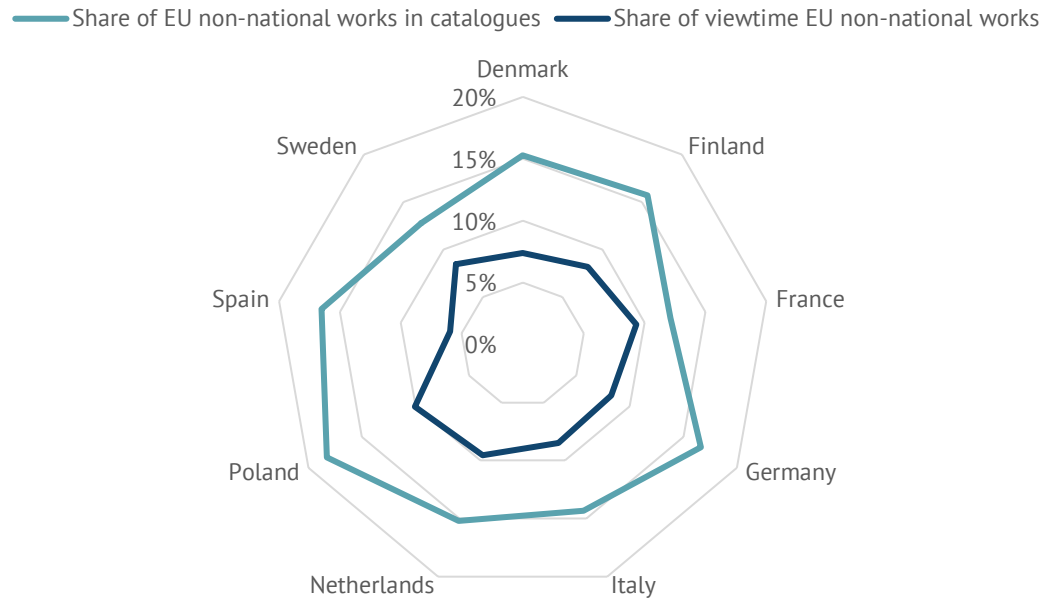


## Viewtime vs share of works in catalogue

*In total viewtime in hours and number of works, EU9*

# EU non-national content is less watched than its share in catalogue in all countries

- EU non-national content accounted for 15% of the catalogue in the sample but only 8% of consumption.
- European non-national was less watched in all countries of the sample.
- Spain was the country where EU non-national content was the least consumed compared to its share in catalogue (-11%).
- France was the country where the gap between EU non-national content consumption and catalogue was the smallest (-3%).

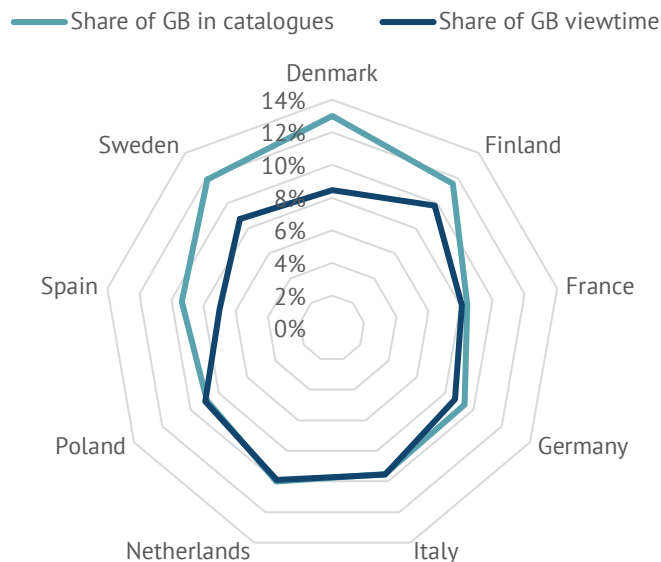


Viewtime vs share of works in catalogue

*In total viewtime in hours and number of works, EU9*

# GB content has various performance throughout the 9 countries

- GB content consumption was slightly under its share in catalogue in all countries (9% vs 10%).
- In four countries the GB content consumption was in line with its share in catalogue: France, Italy, Netherlands, Poland.
- In five countries the GB content consumption was under its share in catalogue: Denmark, Finland, Germany, Spain and Sweden.
- Denmark is the country where GB content was the least consumed compared to its share in catalogue (-5%).



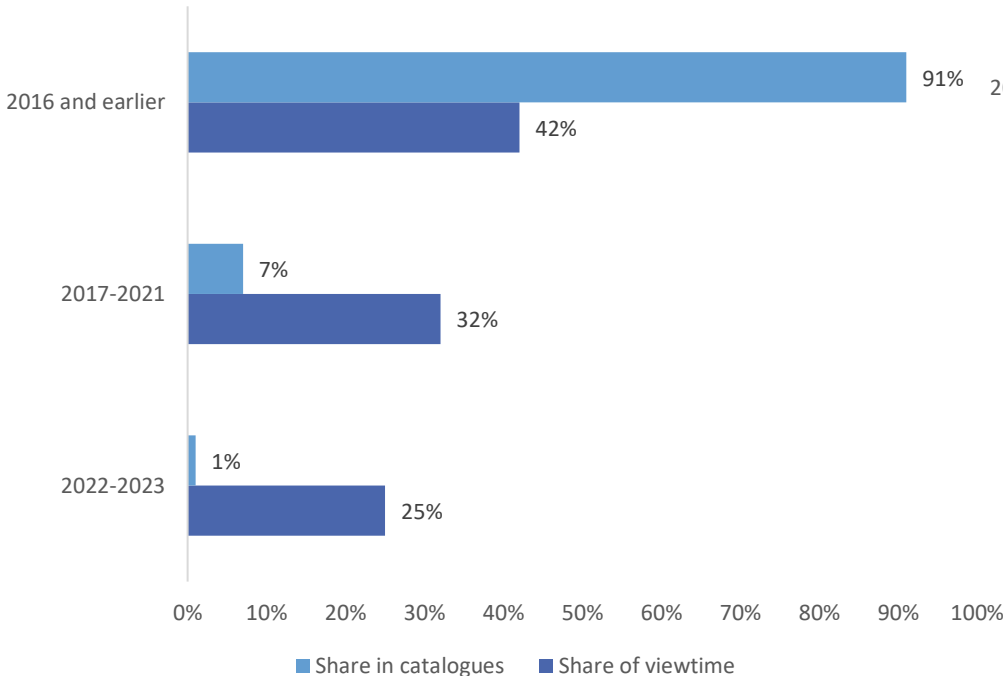
## Viewtime vs share of works in catalogue

*In total viewtime in hours and number of works, EU9*

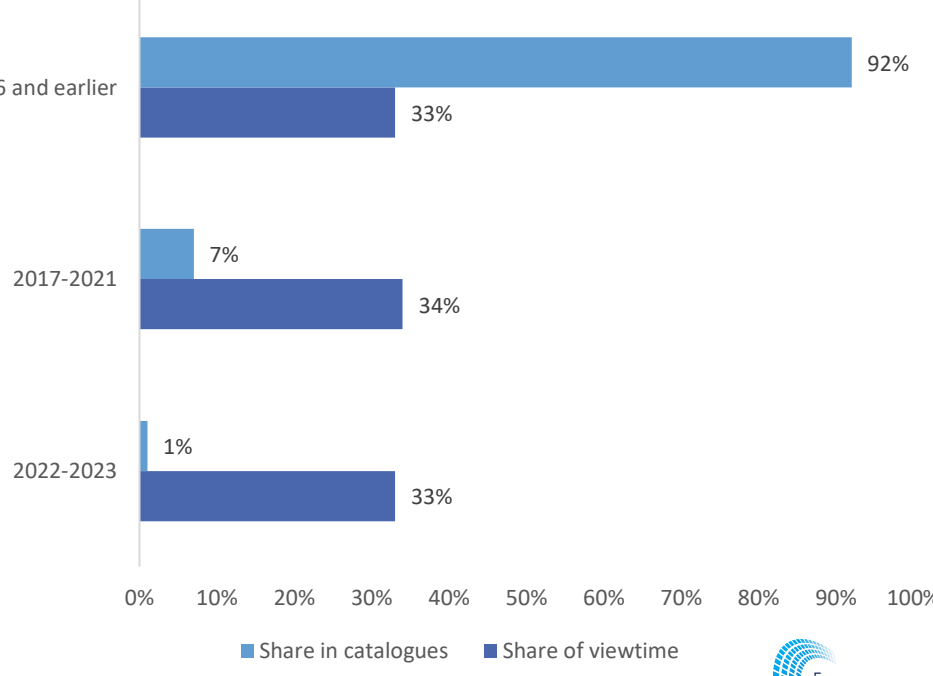
# 1% of films in SVOD catalogues accounted for 25% of viewtime for films

- While catalogue films accounted for over 90% of all films available in SVOD catalogues, they only accounted for 42% of viewtime for all films and 33% of viewtime for EU27 films.
- Recent films, produced in 2017 and after, accounted for over 57% of viewtime for all films while accounting for only 8% of films available in catalogues.
- For EU27 films, the advantage of recent films was even more stark: while only accounting for 8% of all EU27 films, films produced in 2017 or after totalled more than 2/3 of viewtime for EU27 films.

All films - Split of viewtime and share in catalogues by year of production  
In % of total viewtime in hours and total films in catalogues, EU9



EU27 films - Split of viewtime and share in catalogues by year of production  
In % of total viewtime in hours and total films in catalogues, EU9

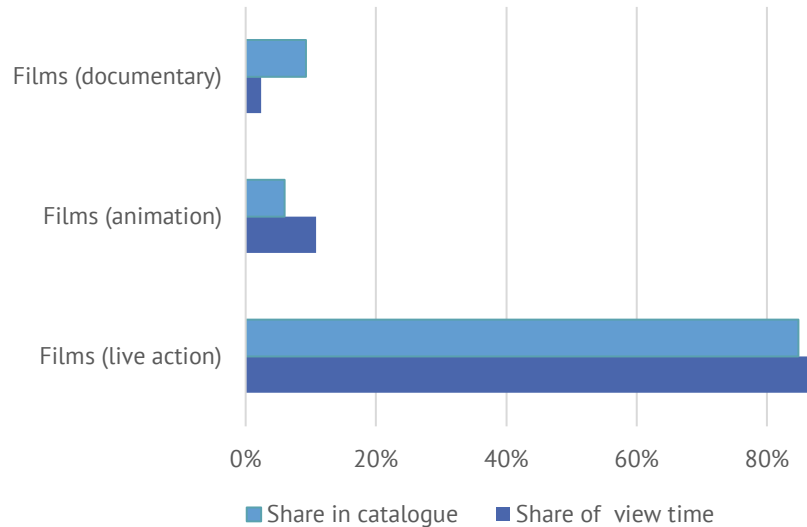


Source: OBS based on Goldmedia data

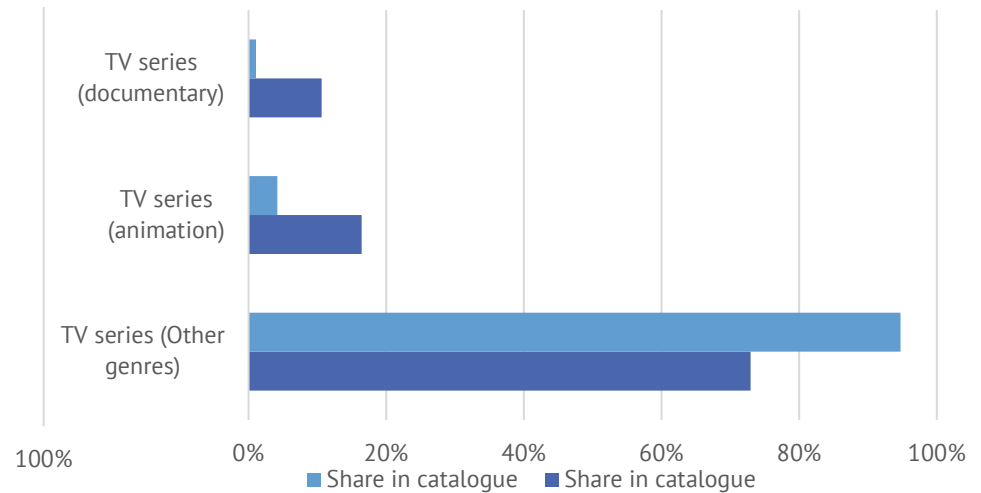


# Live action films and other genres in TV are more watched compared to share in catalogue

- Animation and live action films were slightly more consumed than their shares in catalogue (respectively +5% and +2%).
- Documentary films were less consumed than their shares in catalogue (-7%).
- Other TV genres were much more consumed than their shares in catalogue (+22%).
- Documentary and animation TV series were less consumed than their shares in catalogue (respectively -10% and -12%).



Viewtime vs share of works in catalogue  
In total viewtime in hours and number of works, EU9



Viewtime vs share of works in catalogue  
In total viewtime in hours and number of works, EU9

## **Part 3: SVOD viewing – focus on 9 EU countries**

**Viewtime by origin for films and TV seasons**

**Viewtime of exported EU works**

**Viewtime by origin and genre**

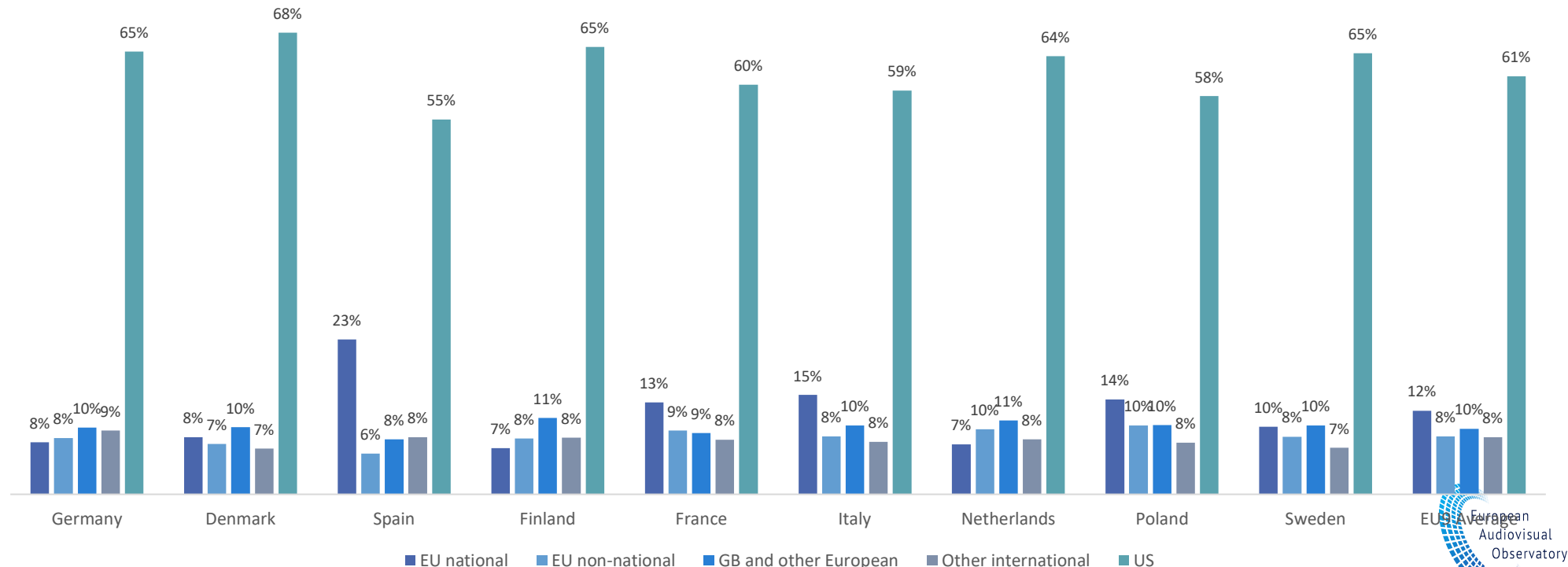
**Viewtime by origin and year of production**

**For DE, DK, ES, FI, FR, IT, NL, PL, SE**

# European works represent between 25.5% and 36.6% of total viewtime in EU9

- With an average of 30.3% of viewtime in the EU9, the viewing of European works varies strongly in the nine European countries with the main difference being the share of viewtime for national works.
- Spain is the country with the highest share of viewtime for national works with 22.6%, propelled by streaming originals produced in the country, and Finland the lowest with 6.8%.
- Poland has the highest share of viewtime for EU non-national works with 10%.
- EU content is overrepresented in terms of consumption in Spain, Italy, France and Poland, mainly through higher-than-average viewing of national works, and US content is overrepresented in consumption in the Nordic countries.

Viewtime by country and origin  
In % of total viewtime in hours, EU9



Source: OBS based on Goldmedia data

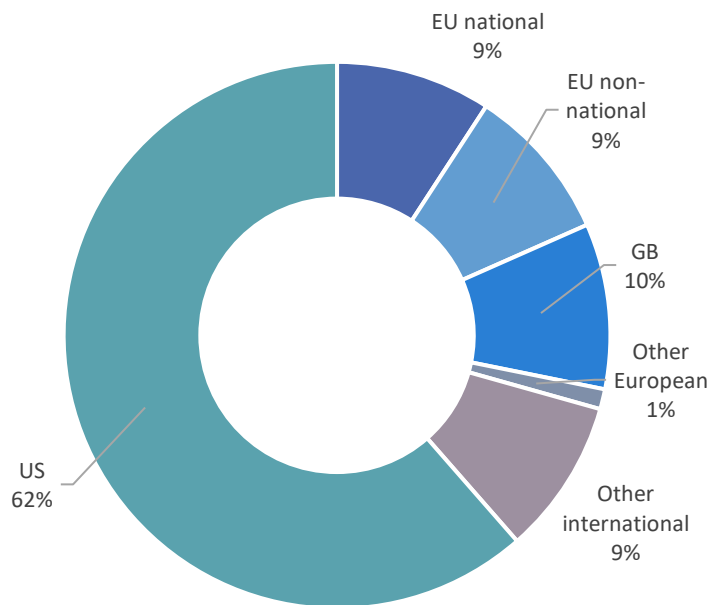


# **Viewtime by origin for films and TV seasons In 9 EU countries**

# DE - US TV seasons over-represented in VOD usage

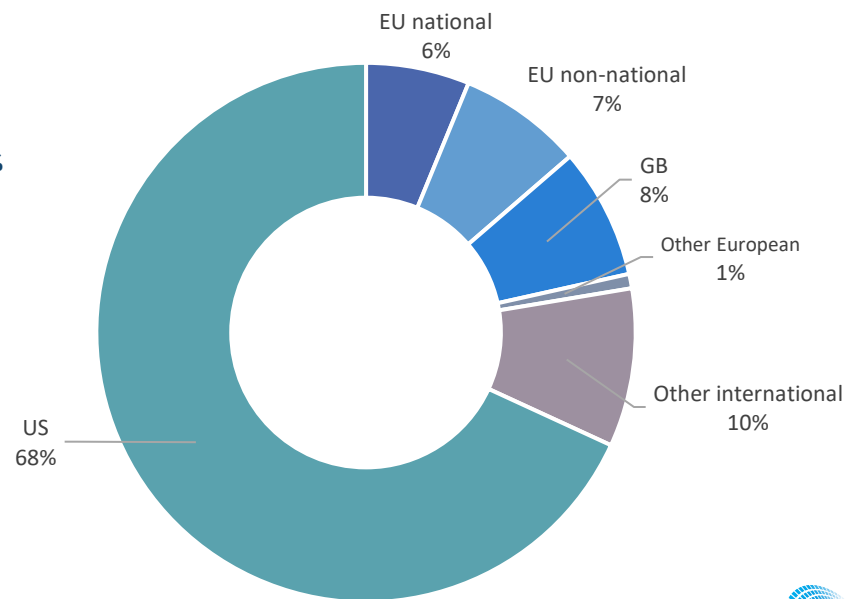
- German viewers preferred mainly to watch US films with 62% of total viewing time, while their share in catalogues was only 39%. British films accounted for 10% of film viewing time, followed by EU national and EU non-national films, both with 9%.
- When it comes to TV seasons, US seasons accounted for 68% of total TV viewing time followed by other international content (10%). Most of these TV seasons came from Korea, Japan and Canada and were mainly anime or adult cartoons.
- European TV seasons represented 22.4% and European films 29.3%, respectively, of total viewing time.

Films - Split of viewtime by origin  
*In % of total viewtime in hours, Germany*



TV - Split of viewtime by origin  
*In % of total viewtime in hours, Germany*

**Share of total viewing time of European works:**  
**Films 29.3%**  
**TV seasons 22.4%**

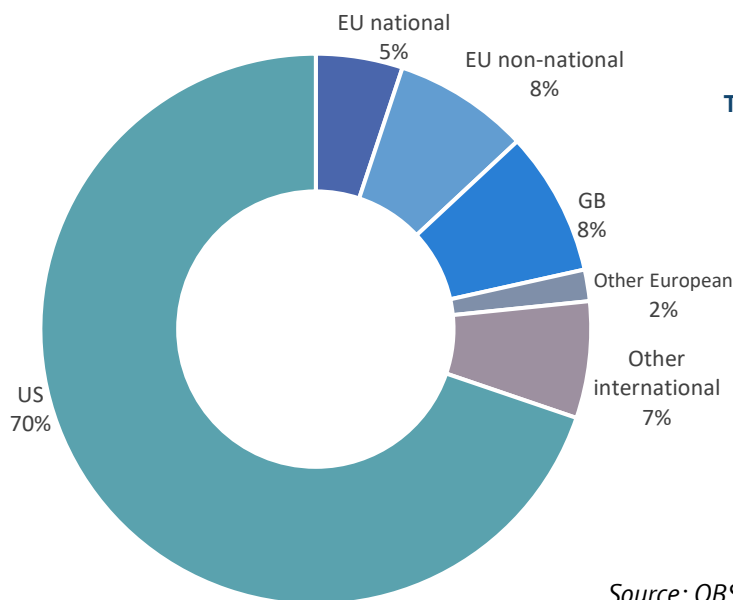


Source: OBS based on Goldmedia data

# DK – A much higher share of viewtime for Danish TV seasons compared to films

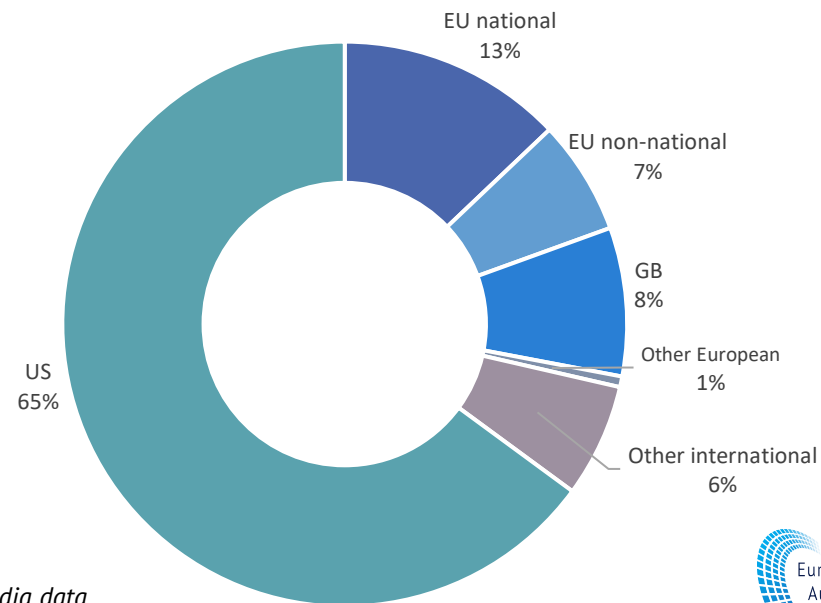
- In Denmark, national TV seasons accounted for almost half of European TV viewing time, as viewers watched more national TV drama (e.g. *The Chestnut Man*, *Sommerdahl*) or TV games (*Robinson ekspeditionen*). One of the reasons for this high share for national TV content on SVOD is also that the public broadcaster, TV 2, offers a pay SVOD service in Denmark, unlike the other public broadcasters in the eight other EU countries of the sample.
- National production was overrepresented in both film and TV consumption. Film production accounted for 5% of viewtime and for 3% of the catalogue. National TV production was overrepresented with 13% of viewtime while accounting for 2% of the catalogue.
- US films accounted for 70% of total film viewing time, followed by GB films and EU non-national films (8%).
- European TV seasons represented 28.6% and European films 23.3%, respectively, of total viewing time.

Films - Split of viewtime by origin  
In % of total viewtime in hours, Denmark



Share of total viewing time of European works:  
**Films 23.3%**  
**TV seasons 28.6%**

TV - Split of viewtime by origin  
In % of total viewtime in hours, Denmark

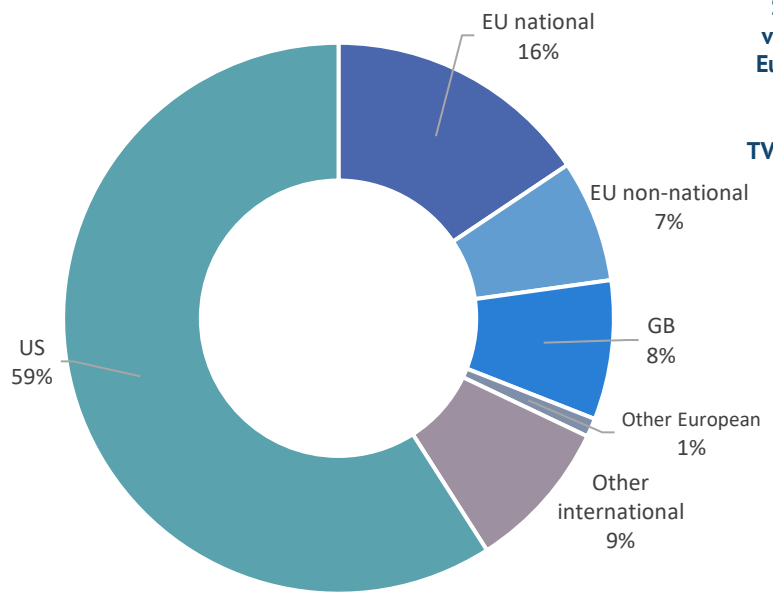


Source: OBS based on Goldmedia data

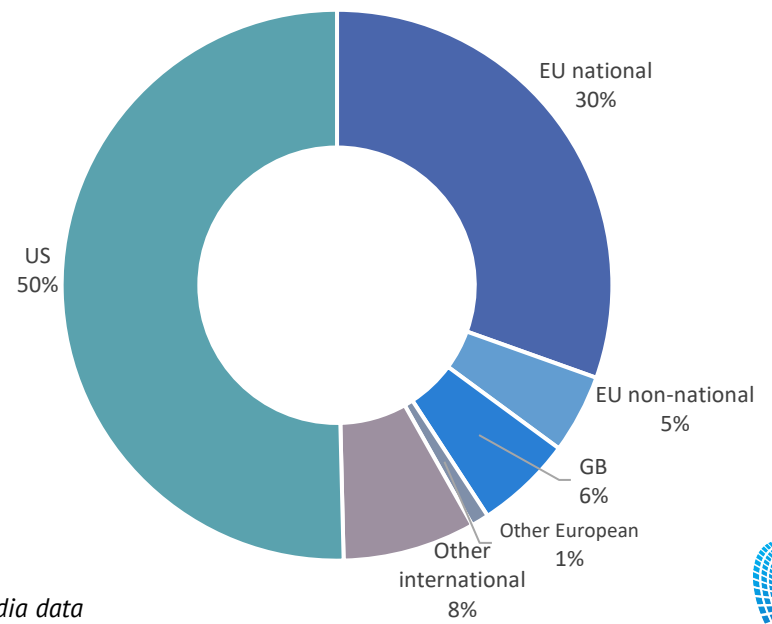
# ES – Highest share of viewtime for national TV seasons of all 9 EU countries

- In Spain, EU content consumption was mostly driven by EU national TV seasons with 30% of the total TV viewtime, while representing only 14% of the catalogue. The consumption was mostly driven by Spanish streaming originals, as Spain has become a TV series production hub.
- US films accounted for 59% of total film viewing time. Spanish films accounted for 16% of viewing time, followed by GB films (11%).
- Most of the other international content came from Korea, Colombia, Japan, Mexico and Canada.

Films - Split of viewtime by origin  
In % of total viewtime in hours, Spain



TV - Split of viewtime by origin  
In % of total viewtime in hours, Spain



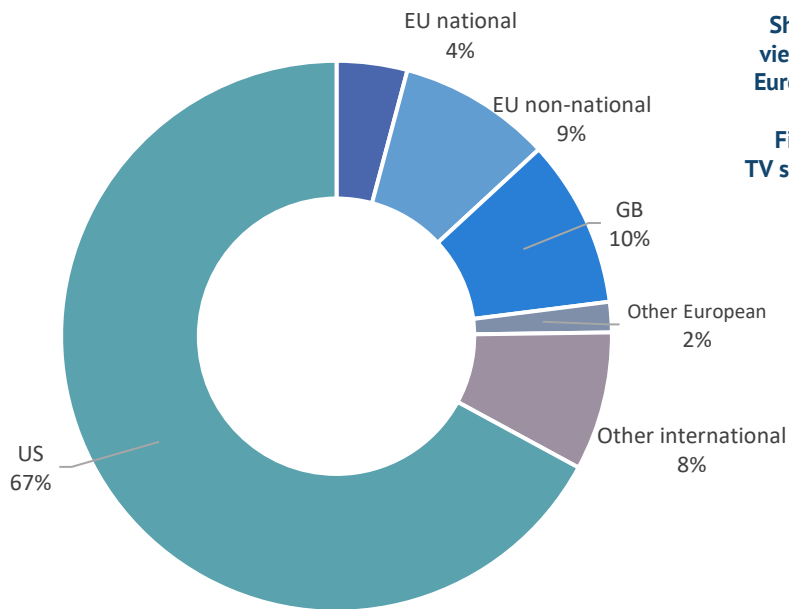
**Share of total viewing time of European works:**  
**Films 32%**  
**TV seasons 41.8%**

Source: OBS based on Goldmedia data

# FI – A higher share of viewing time for GB films and TV seasons than the sample average

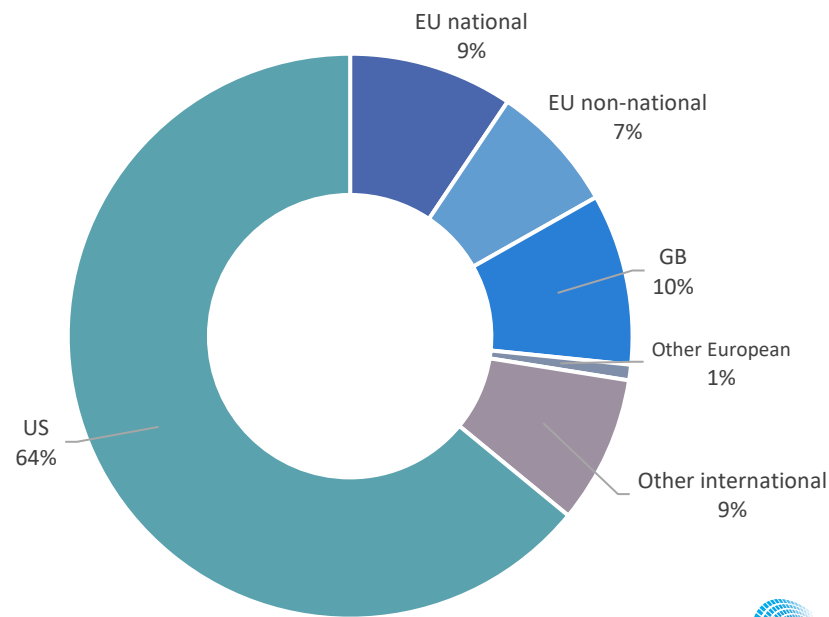
- Finnish movie consumption focused on US films with 67% of total viewing time, followed by GB films (10%) and EU non-national films.
- National TV production was overrepresented with 9% of viewtime while accounting for 3% of the catalogue.
- The US accounted for 64% of total TV viewing time followed by EU national films (9%) and other international content (9%) which originated mostly from Korea, Canada and Japan.
- European TV seasons represented 27.5% and European films 24.8%, respectively, of total viewing time.

Films - Split of viewtime by origin  
*In % of total viewtime in hours, Finland*



**Share of total viewing time of European works:**  
**Films 24.8%**  
**TV seasons 27.5%**

TV - Split of viewtime by origin  
*In % of total viewtime in hours, Finland*

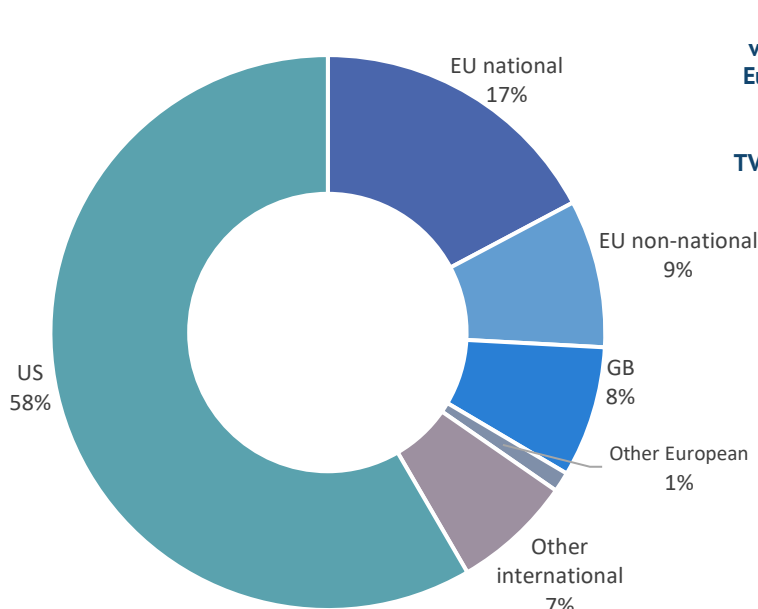


Source: OBS based on Goldmedia data

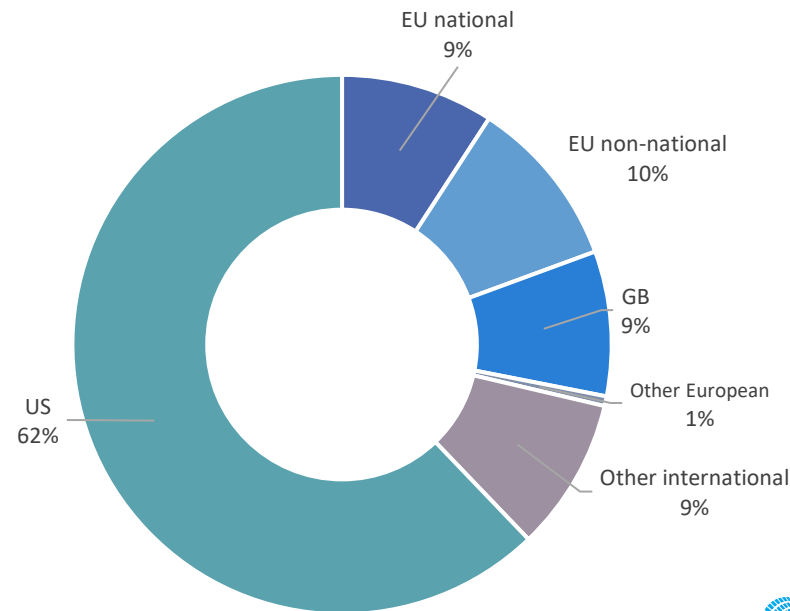
# FR – High share of viewtime for national films

- With a high film production volume in France, French films accounted for 17% of film viewing time, the highest share of viewtime for national films of the nine countries. Nevertheless, the share of national films accounted for 22% of the catalogue in France.
- When it comes to TV seasons, US seasons accounted for 62% of total TV viewing time followed by EU non-national films (10%) thanks partly to Spanish and German content.
- European TV seasons represented 28.6% and European films 34.6%, respectively, of total viewing time.

Films - Split of viewtime by origin  
In % of total viewtime in hours, France



TV - Split of viewtime by origin  
In % of total viewtime in hours, France



Share of total  
viewing time of  
European works:

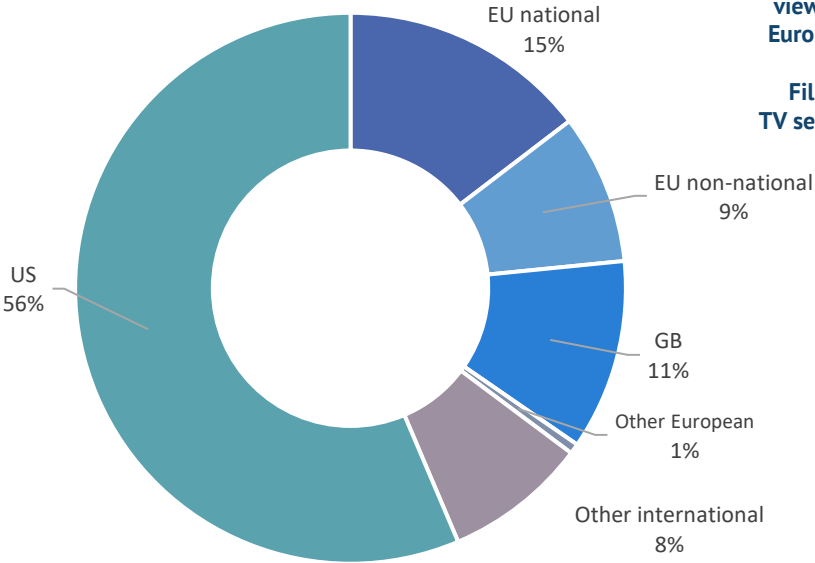
Films 34.6%  
TV seasons 28.6%

Source: OBS based on Goldmedia data

# IT - National works, both for films and TV seasons, have a higher share of viewtime than EU9 average

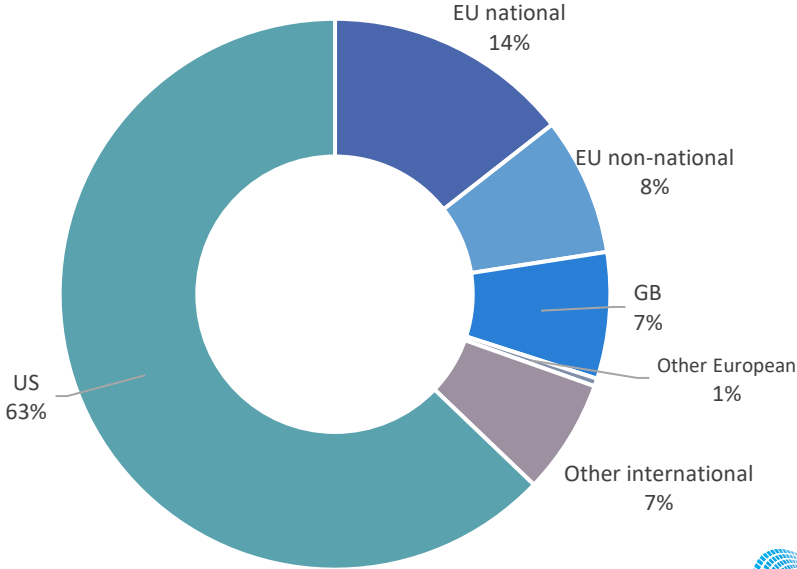
- Italian films accounted for 15% of film viewing time, followed by GB films (11%) and EU non-national films.
- National TV production was overrepresented in consumption with 14% of the total TV viewtime, while representing only 5% of the catalogue.
- As in other countries, Italian viewers' viewtime focused on US films with 58% of total viewing time, with European films accounting for 35.2% of total viewtime.
- US TV seasons accounted for 63% of total TV viewing time followed by Italian TV seasons with 14% and other EU non-national TV seasons (ES shows being the most watched).
- European TV seasons represented 30.4% and European films 35.2%, respectively, of total viewing time.

Films - Split of viewtime by origin  
In % of total viewtime in hours, Italy



Share of total viewing time of European works:  
Films 35.2%  
TV seasons 30.4%

TV - Split of viewtime by origin  
In % of total viewtime in hours, Italy

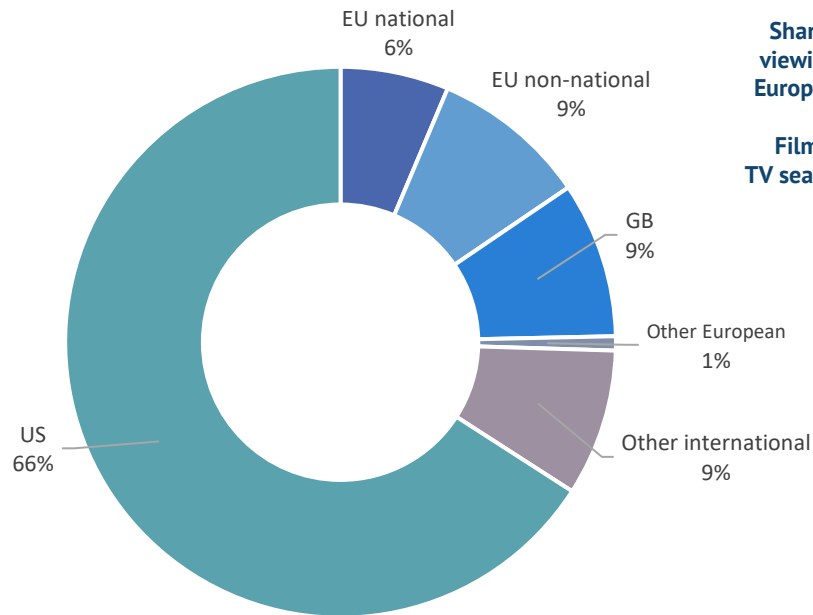


Source: OBS based on Goldmedia data

# NL – Higher share of viewing time for GB TV seasons than the EU9 average

- US films accounted for 66% of total film viewing time, followed by GB films and EU non-national films(9%).
- In the Netherlands, EU content consumption was mostly driven by EU national TV productions with 10% of the total TV consumption. Nevertheless, national TV productions only accounted for 4% of the catalogue and represented 9% of the consumption.
- As in other mid-volume film-producing countries, viewing time for European films was mostly comprised of EU non-national and British films.
- European TV seasons represented 28.6% and European films 23.3%, respectively, of total viewing time.

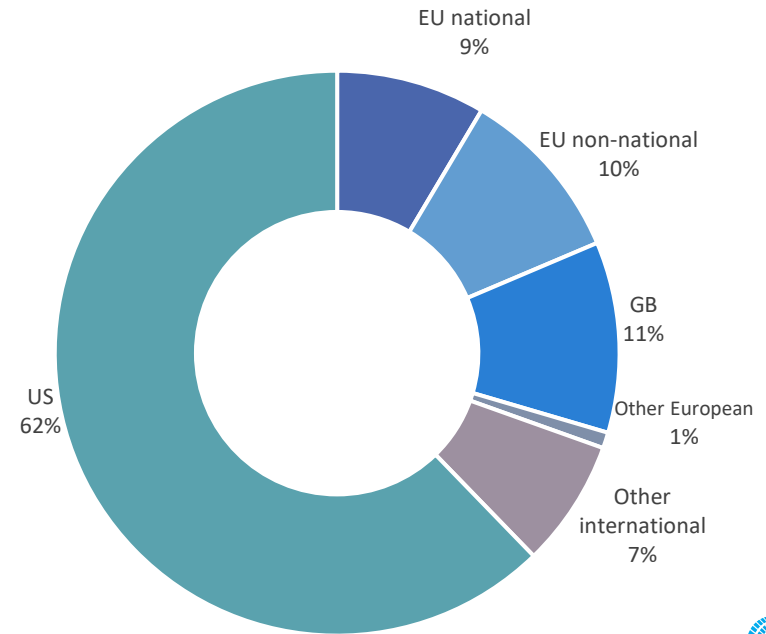
Films - Split of viewtime by origin  
In % of total viewtime in hours, Netherlands



Share of total viewing time of European works:

Films 23.3%  
TV seasons 28.6%

TV - Split of viewtime by origin  
In % of total viewtime in hours, Netherlands



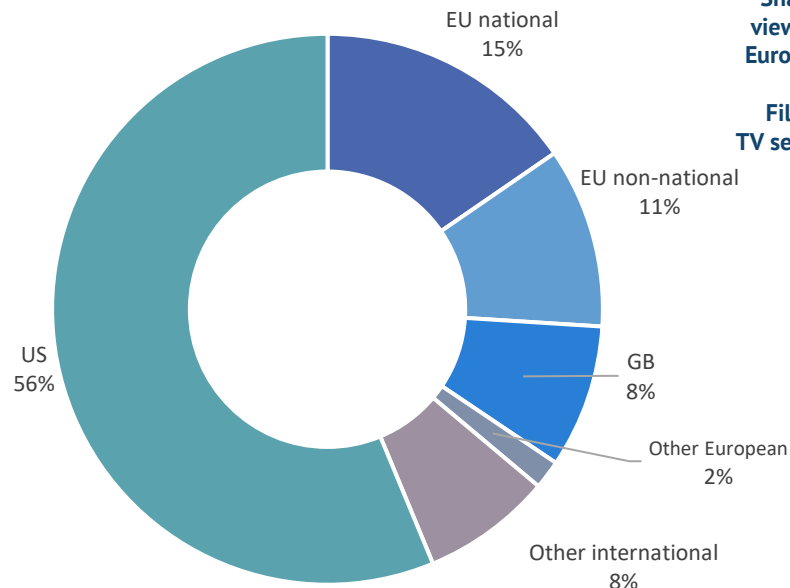
Source: OBS based on Goldmedia data



# PL – The highest share of viewtime for EU non-national films and TV seasons of all 9 countries of the sample

- National films, such as *365 Days*, *Dziewczyny z Dubaju* and *Jak zostalem gangsterem. Historia prawdziwa*, comprised a 15% share of total film viewing for national films, with FR and ES in pole position. National production was overrepresented in both film and TV consumption. Film production accounted for 15% of viewtime while accounting for 7% of the catalogue. National TV production was overrepresented with 12% of viewtime while accounting for 6% of the catalogue.
- US films accounted for 56% of film viewing time.
- US TV seasons accounted for 61% of total TV viewing time followed by national TV seasons (12%).
- European TV seasons represented 31.5% and European films 36.1%, respectively, of total viewing time.

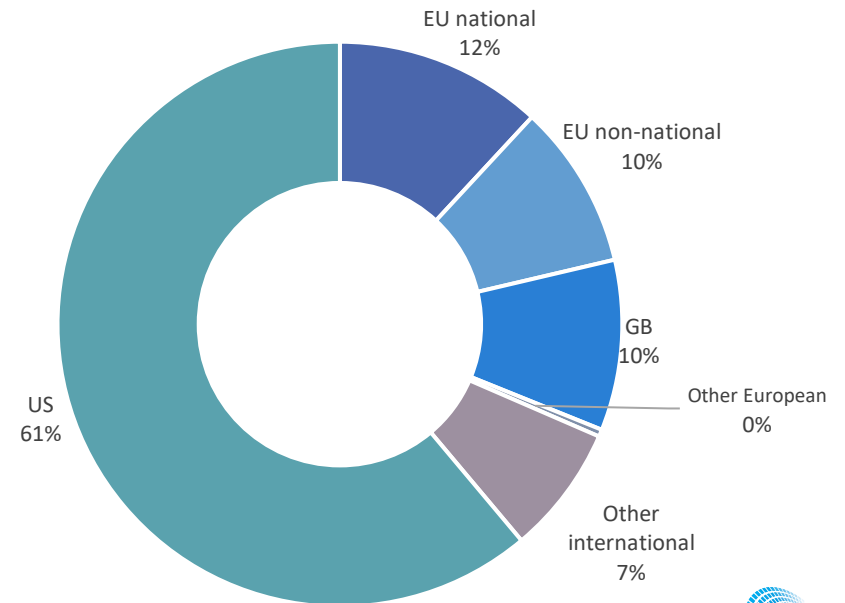
Films - Split of viewtime by origin  
*In % of total viewtime in hours, Poland*



Share of total viewing time of European works:

Films 36.1%  
TV seasons 31.5%

TV - Split of viewtime by origin  
*In % of total viewtime in hours, Poland*

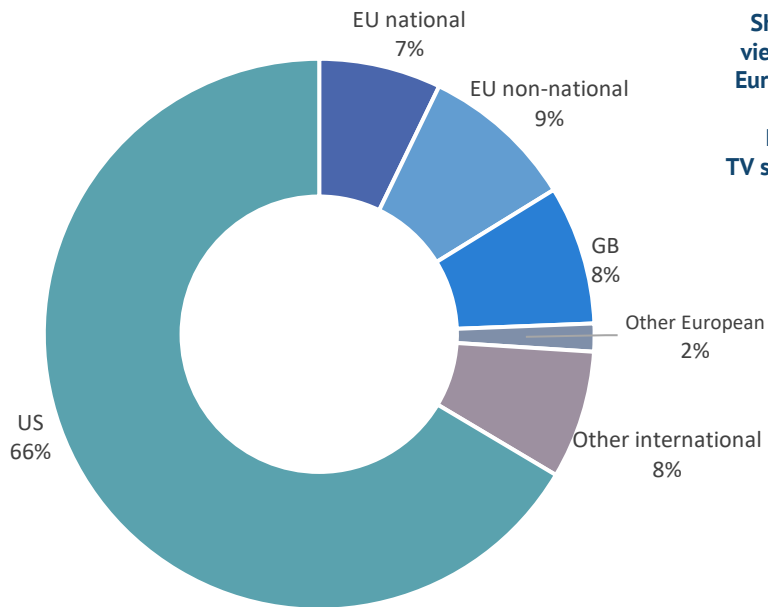


Source: OBS based on Goldmedia data

## SE – A high share of viewing time for national TV seasons

- When it comes to TV, Swedish TV seasons accounted for 13% of total TV viewing time, as viewers watched streaming originals such as *Snabba Cash* or *Young Royals*. With only 4% of the TV season catalogue, Swedish content was overrepresented in consumption with 13% of viewtime.
- US seasons accounted for 63% of total viewing time and British TV seasons for 9%.
- Swedish viewers preferred mainly to watch US films with 66% of film viewing time, followed by EU non-national (9%) thanks to French and German movies.
- European TV seasons represented 31.3% and European films 26%, respectively, of total viewing time.

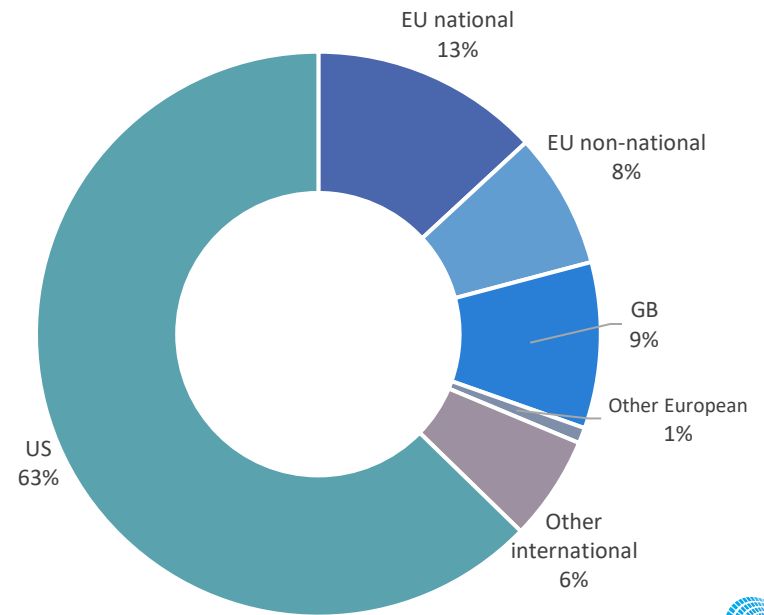
Films - Split of viewtime by origin  
*In % of total viewtime in hours, Sweden*



**Share of total viewing time of European works:**

**Films 26%  
TV seasons 31.3%**

TV - Split of viewtime by origin  
*In % of total viewtime in hours, Sweden*



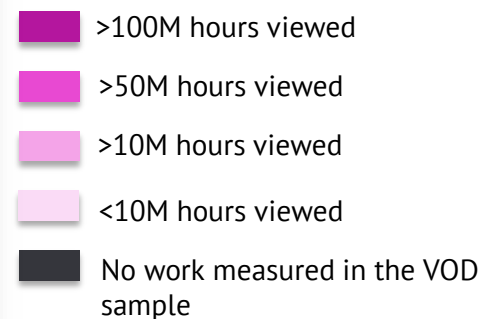
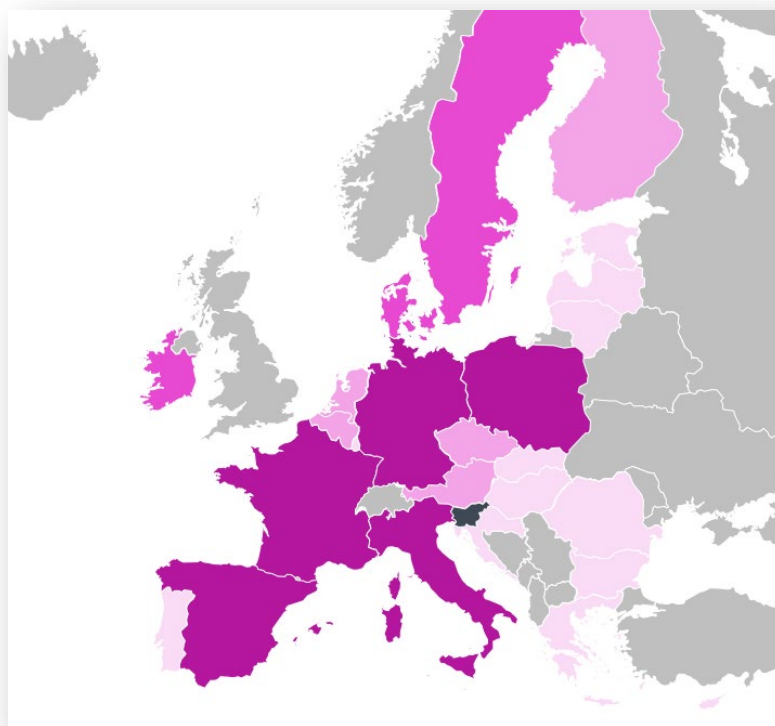
Source: OBS based on Goldmedia data

# **Viewtime of exported EU works**

## **The share of viewtime of EU non-national works by production country**

# Viewtime by production country (EU27) – only EU non-national works

- The top five export production countries with the highest viewing time outside their national markets for their works are France, Germany, Spain, Italy and Poland.
- Sweden, Denmark and Ireland are medium-size countries when it comes to viewing time of their works outside domestic markets.
- Smaller production countries such as Romania, Bulgaria and Lithuania, with a smaller number of works on VOD services, unsurprisingly have a lower share of viewtime on VOD.

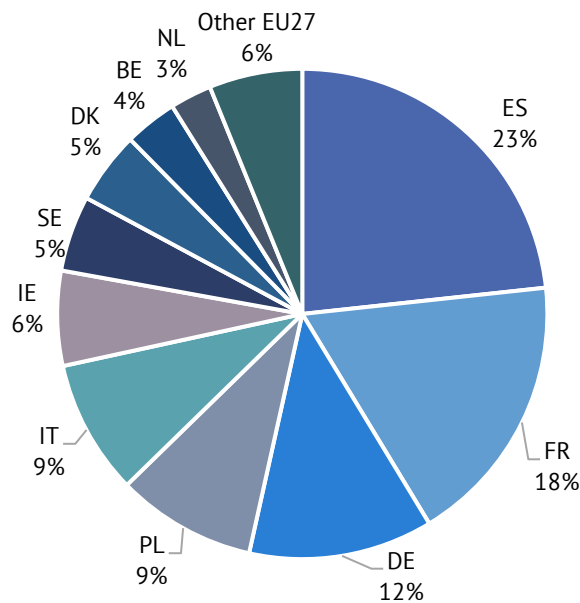


Source: OBS based on Goldmedia data

## Viewtime by production country (EU27) – only EU non-national works

- The top 10 countries account for 94% of view time and 88% of EU non-national works in SVOD catalogues.
- The 3 biggest export production countries account for half of film and TV consumption (Spain, France, and Germany) and 49% of EU non-national works in SVOD catalogues.
- 16 EU countries accounted for less than 6% of viewtime for EU non-national works and 12% of EU non-national works in the catalogues.

Share of view time of EU non-national works by EU 27 production countries

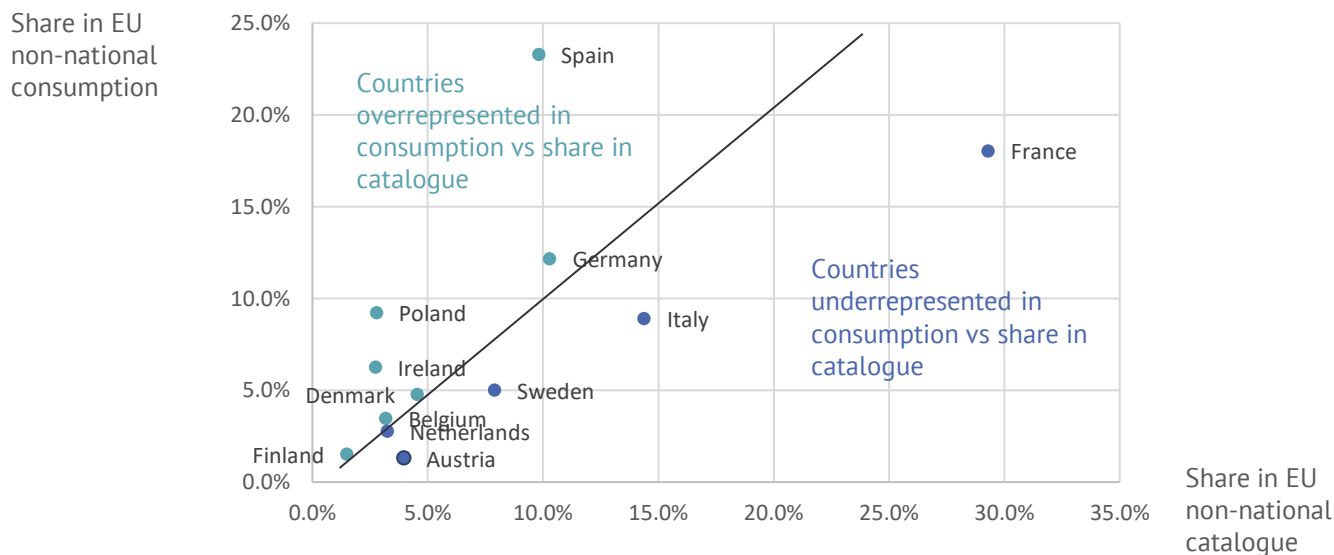


Source: OBS based on Goldmedia data

# Relationship between share of viewtime and share of catalogue – only EU non-national works

- A minority of EU countries have lower shares of view time compared to their shares in SVOD catalogues (ES, DE, DK, BE, IE, FI, PL,).
- France and Italy are two major production countries with a share in consumption significantly smaller than their shares in catalogues (18% of consumption vs 29% of the catalogue for France and 9% of consumption vs 14% of the catalogue for Italy).

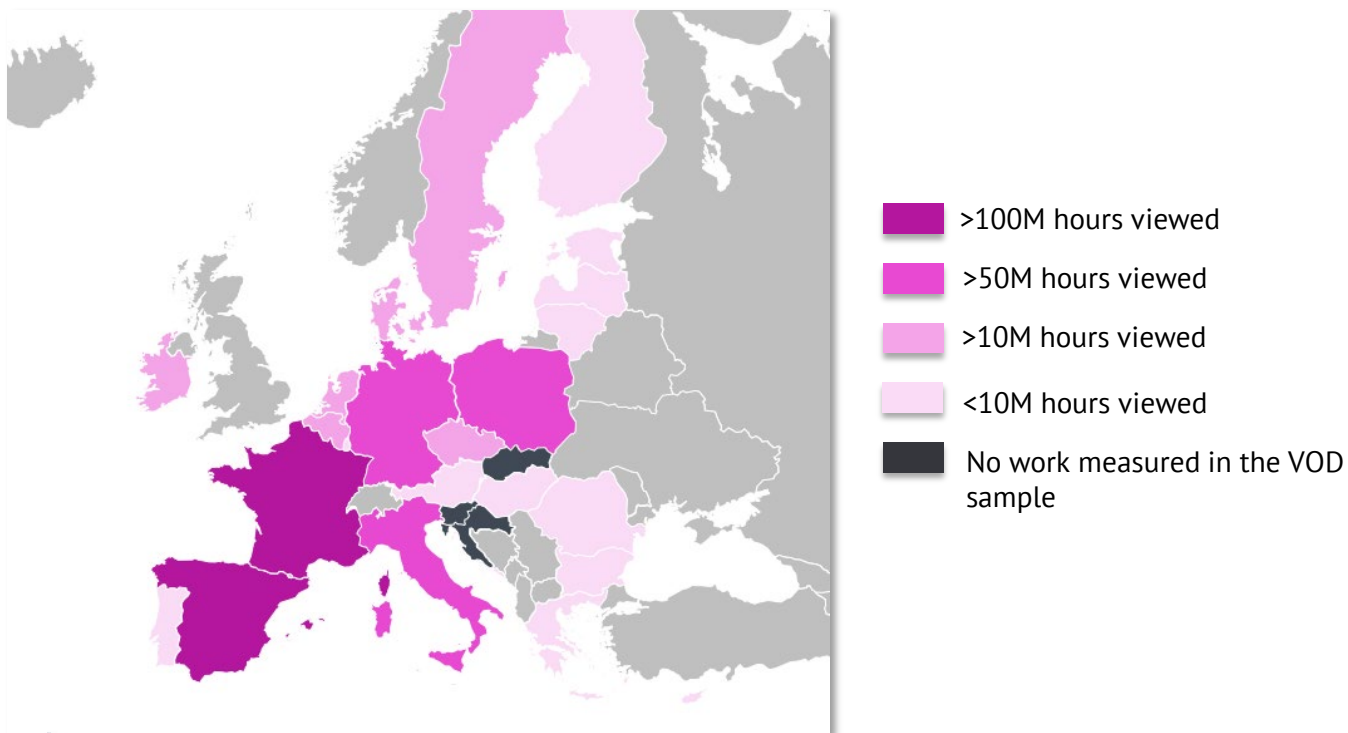
Comparison share in catalogue vs consumption of EU non-national content  
(12 biggest countries' share in catalogue)



Source: OBS based on Goldmedia data

## Viewtime by production country (EU27) – Films – Only EU non-national works

- France and Spain are the two production countries with the highest viewtime for films outside their national markets; they are the only production countries with over 100M hours viewing time outside their national markets.
- The other high-volume film-producing countries, Germany, Italy and Poland, accounted for more than 50 million hours of viewtime.
- No Slovenian, Croatian or Slovak film title was in the sample of films measured by Goldmedia.

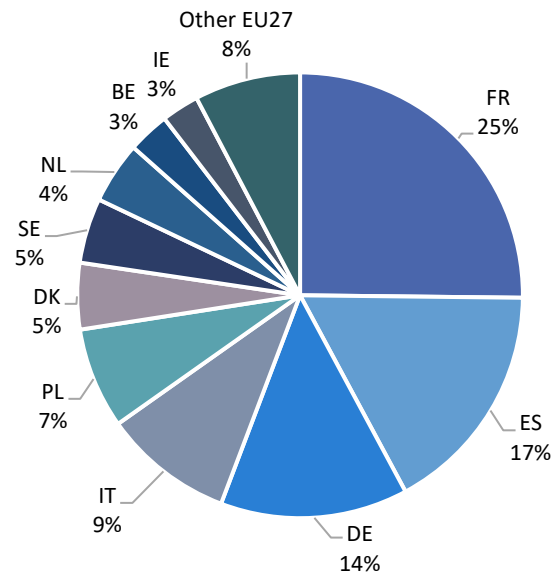


Source: OBS based on Goldmedia data

# Viewtime by production country (EU27) – Films – Only EU non-national works

- The top 10 countries account for 92% of the film viewing time of EU non-national films.
- 3 countries represent half of the total EU non-national film consumption (Spain, France, and Germany).
- Spanish films only account for 9% of EU non-national films in catalogues but 17% of view time.

Share of view time of EU non-national films by EU 27 production countries



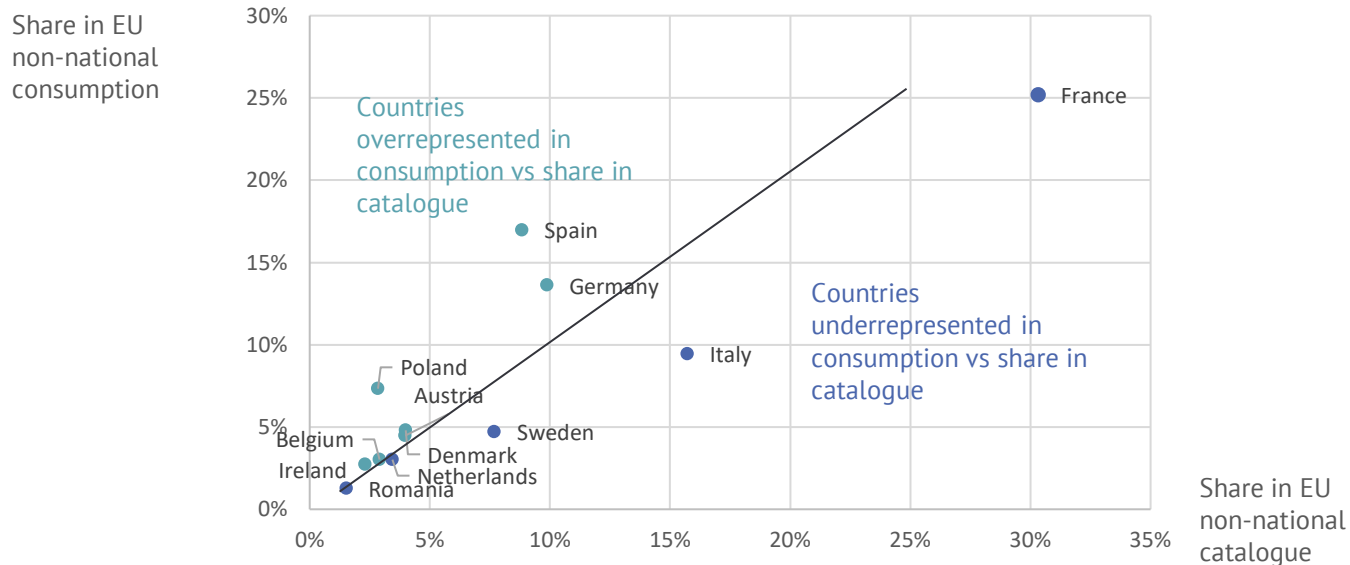
Source: OBS based on Goldmedia data



# Relationship between share of viewtime and share of catalogue – Films – Only EU non-national works

- 7 EU countries had a higher share of view time of EU non-national films compared to their share of EU non-national films in SVOD catalogues (ES, DE, PL, AT, DK, BE, IE).
- 5 EU countries had a higher share of EU non-national films in SVOD catalogues than their share of view time for EU non-national films (FR, IT, SE, RO, NL).

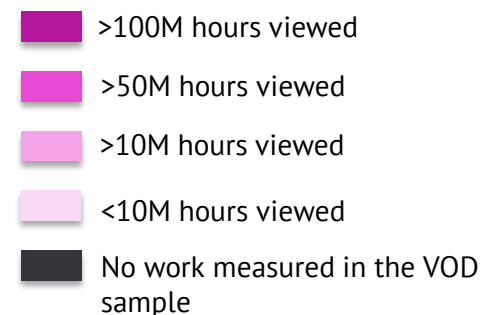
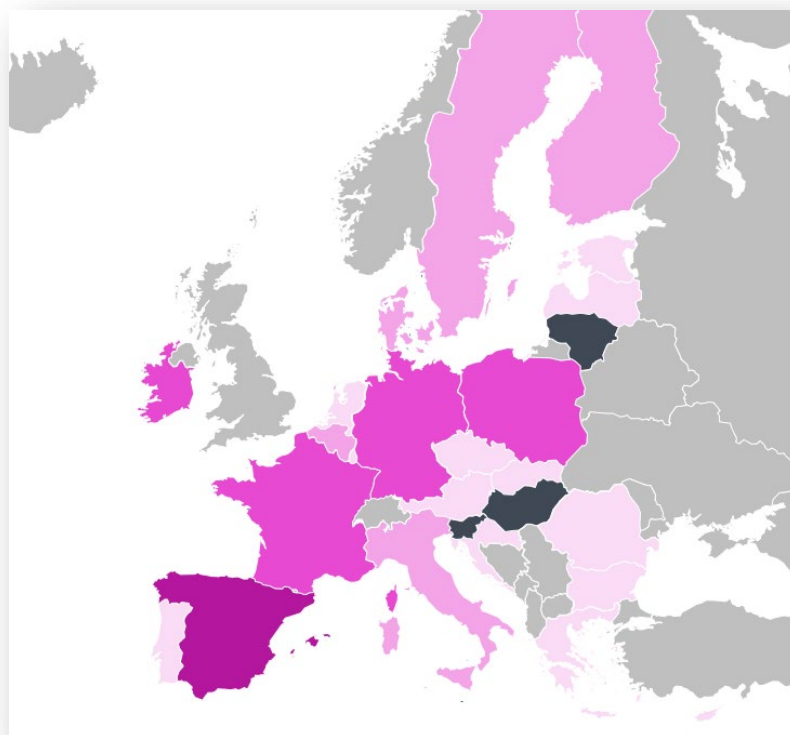
Comparison share in catalogue vs consumption of EU non-national films  
(12 biggest countries' share in catalogue)



Source: OBS based on Goldmedia data

## Viewtime by production country (EU27) – TV seasons - Only EU non-national works

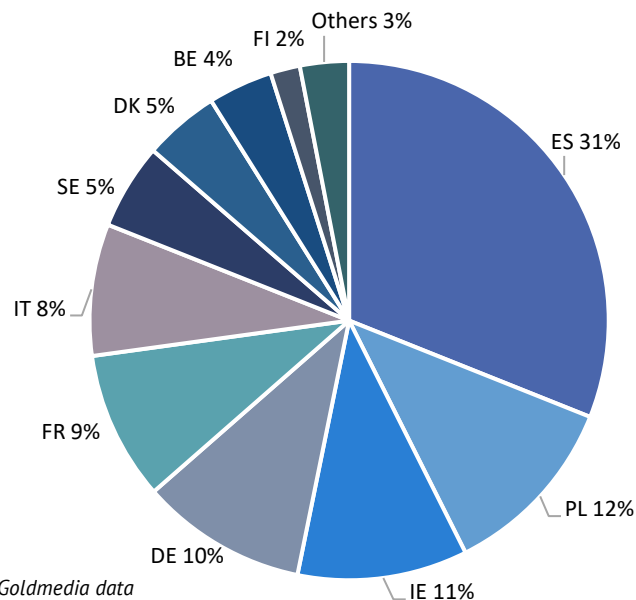
- Spain is by far the country of production with the highest viewtime of TV seasons outside its national market, as it is the only production country with over 100M hours view time for EU non-national TV seasons. This is mainly fueled by original productions of streaming services which travel in their pan-European catalogues.
- Four countries accounted for over 50 million hours of viewtime: Ireland, France, Germany and Poland.
- Ireland, with several major TV productions such as *Vikings* and Poland with a handful of original productions such as *The Witcher*, managed to be at the same level as the high-volume production countries France and Germany.
- Italian TV series underperformed in terms of viewtime compared to Italian films in the viewing of EU non-national works.



## Viewtime by production country (EU27) – TV – Only EU non-national works

- The top 10 countries account for 97% of TV view time for EU non-national works and three countries account for half of the total TV consumption of EU non-national TV seasons (Spain, Poland and Ireland) while only accounting for 20% of EU non-national TV seasons in the catalogues.
- The sheer dominance in view time of TV seasons produced in these three countries is mostly due to streaming originals (Spain and Poland) and major productions by broadcasters and studios in Ireland.
- Spain only accounts for 13% of TV seasons in EU non-national works in catalogues but 31% of view time while Poland accounts for 3% in catalogues and 12% of view time.

Share of view time of EU non-national TV seasons by EU 27 production countries

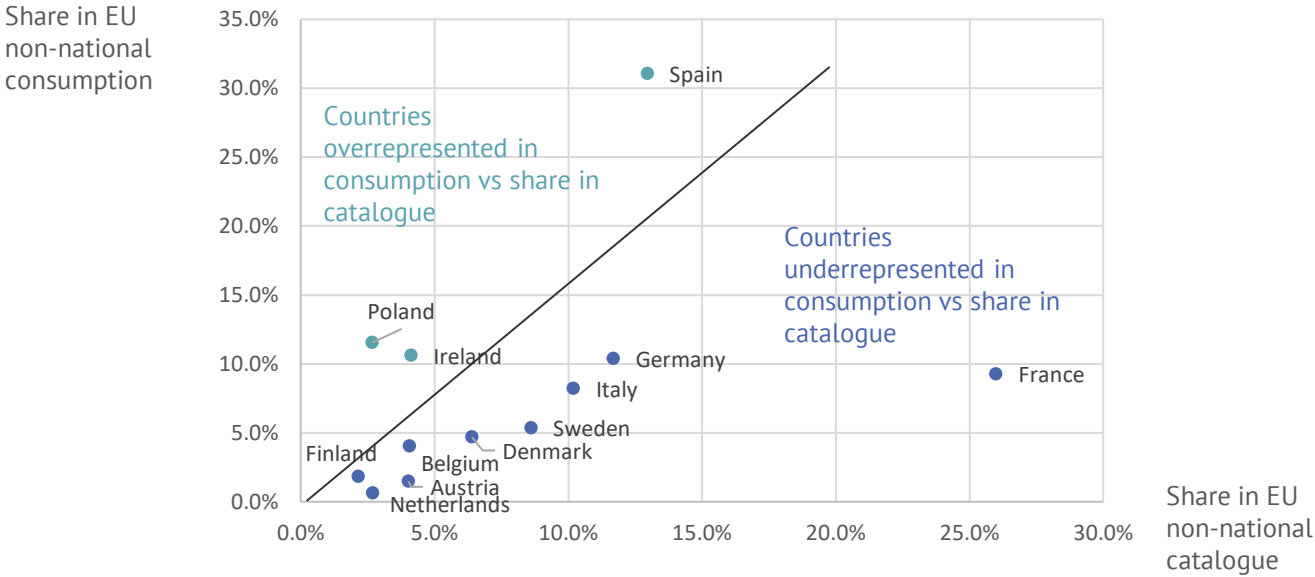


Source: OBS based on Goldmedia data

# Relationship between share of viewtime and share of catalogue – TV – Only EU non-national works

- 3 EU countries had a higher share of view time of EU non-national TV seasons compared to their share of EU non-national TV seasons in SVOD catalogues (ES, PL, IE).
- 9 EU countries had a higher share of EU non-national TV seasons in SVOD catalogues than their share of view time for EU non-national TV seasons (FR, IT, DE, BE, DK, FI, AT, SE, NL).

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

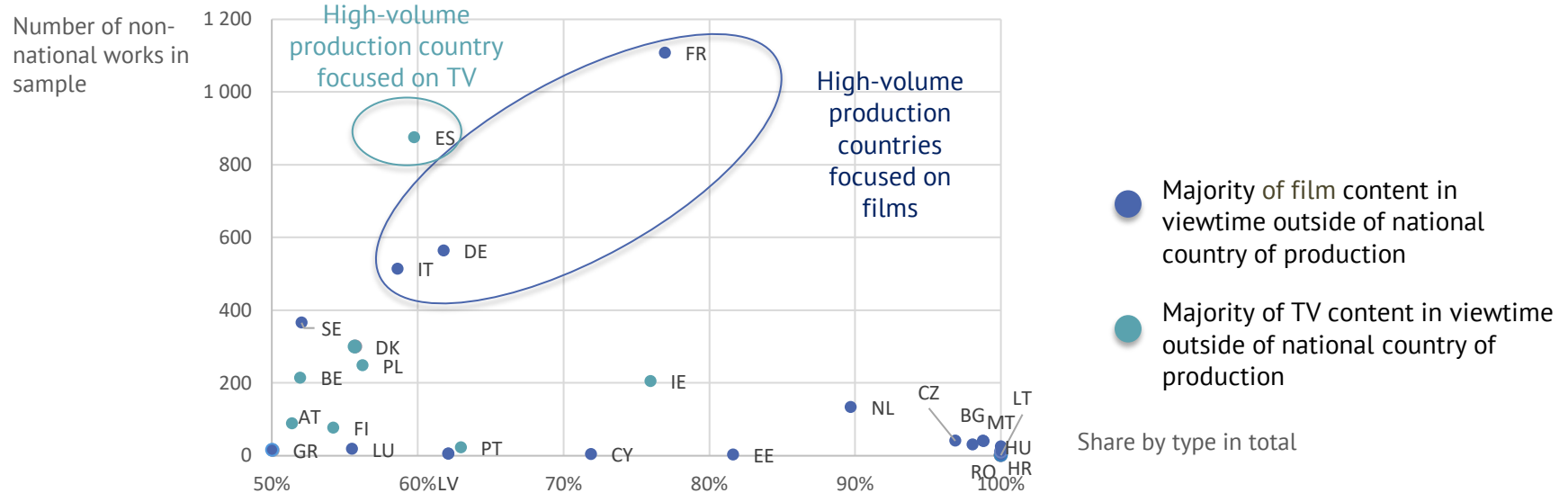


Source: OBS based on Goldmedia data

# Type of content exported by production country (EU27) – only EU non-national works

- Among EU non-national works in the sample measured by Goldmedia, films generated more viewtime than TV seasons for the majority of EU production countries.
- The majority of EU countries generated most viewtime for works produced from films.
- Only a handful of EU production countries generated more viewtime through their TV seasons than through their films (AT, BE, DK, IE, FI, PL, PT).

Viewtime and number of works of EU27 works by type and by production country  
In % of total viewtime in hours



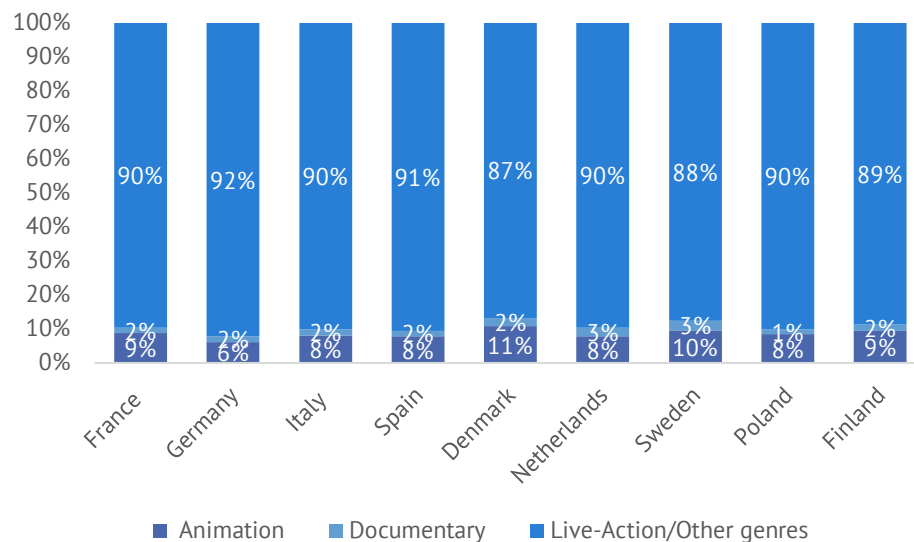
Source: OBS based on Goldmedia data

How to read this graph: 875 works produced in Spain have been watched outside Spain and 60% of the viewtime was made up of TV content.

# No major differences in terms of genre consumption

- The nine countries studied have roughly the same consumption in terms of genre with a large majority of live-action movies and other TV genres.
- Animation is the second most consumed genre, with 6% and 11% of total view time in the nine EU countries.
- Documentaries had roughly the same share of total view time with between 2% and 3% in the different countries.

Split of view time by country of service and by genre  
*In % of total viewtime in hours, EU9*

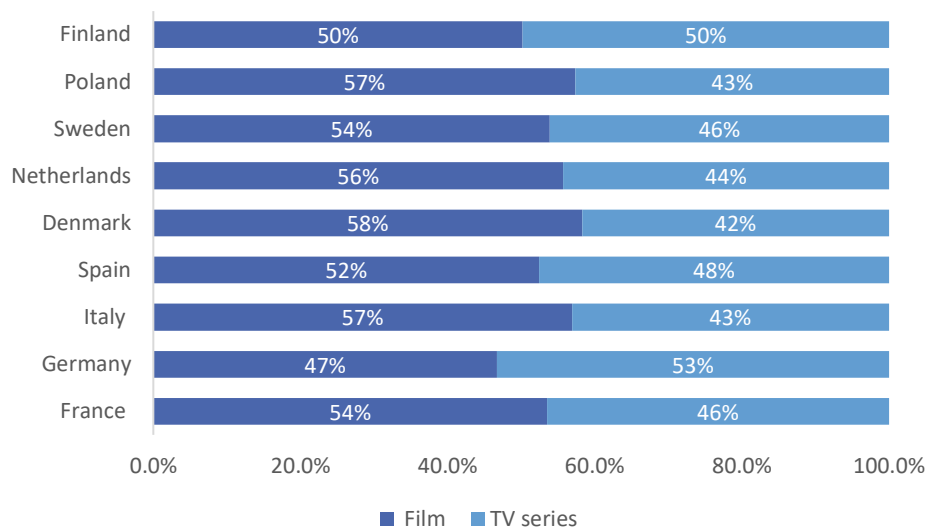


Source: OBS based on Goldmedia data

# Viewing time by type and country

- Germany is the only country where the TV season consumption is higher than the film consumption; in all other countries more time is spent watching films than TV seasons.
- Denmark is the country where the film consumption is the highest compared to TV consumption.

Breakdown of viewing time between films and TV seasons by country



Source: OBS based on Goldmedia data

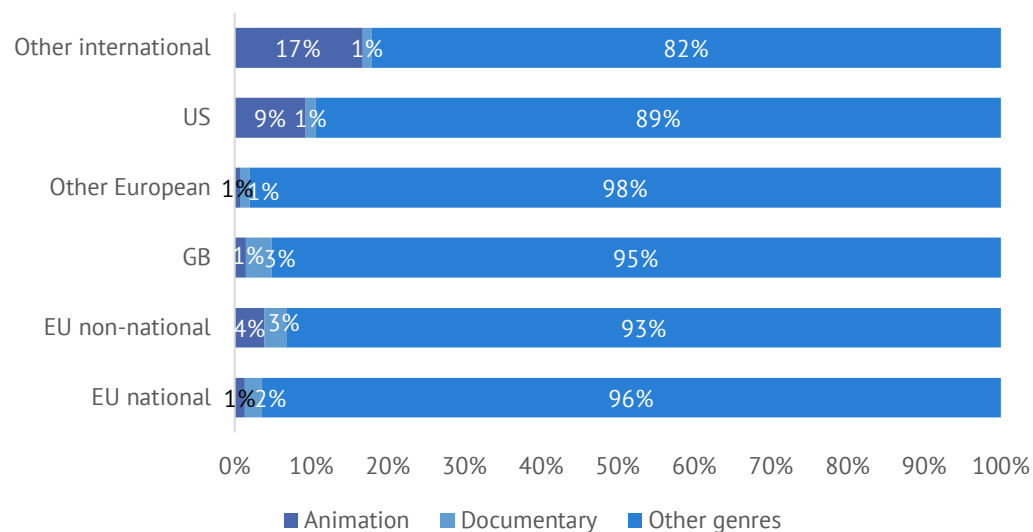
# Viewtime by region of origin and genre



# Viewing time by genre and region of origin

- EU content consumption is unsurprisingly strongly focused on live action films and other TV genres, as they also make up the main part of SVOD catalogues, with 83% of TV seasons being other genres and 83% of all films being live action films.
- Other international and US content is more diverse thanks to the popularity of Japanese Mangas and American animation.

Split of view time by region of origin and by genre  
*In % of total viewtime in hours, EU9*

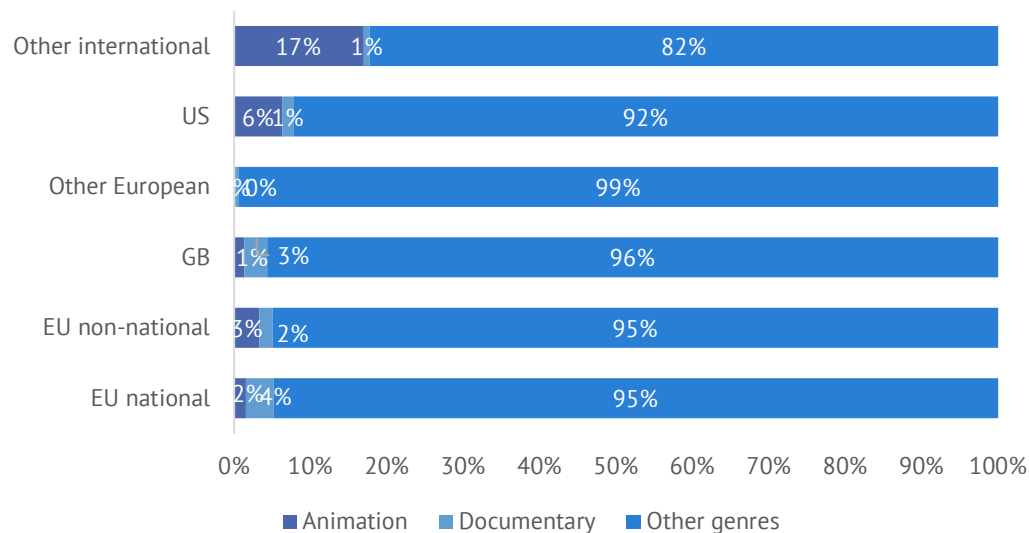


Source: OBS based on Goldmedia data

# DE - Viewing time by genre and by region of origin

- View time for national animation works is slightly above the EU9 average.
- Comparatively, US animation content is less-viewed in Germany than in the other countries of the sample (6% of viewtime vs 9% for EU9 average).

Split of view time by region of origin and by genre  
*In % of total viewtime in hours, Germany*

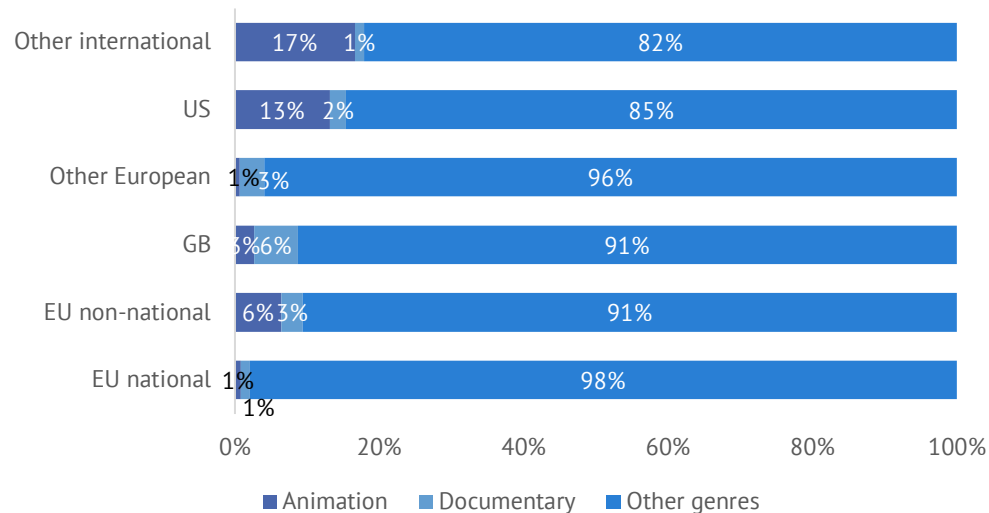


Source: OBS based on Goldmedia data

# DK - Viewing time by genre and by region of origin

- National works view time is even more concentrated on other genres than the EU9 average, with 98% of all national view time going to other genres.
- EU non-national animation works view time is above the EU9 average thanks to the success of *The Wild Life* (BE) and *The Grinch* (FR) and US animation works view time is also above the average.

Split of view time by region of origin and by genre  
*In % of total viewtime in hours, Denmark*

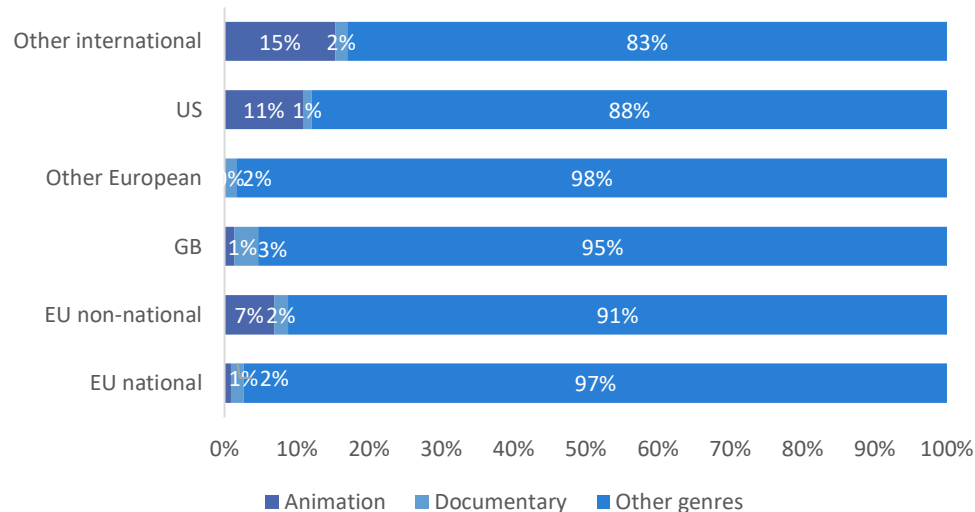


Source: OBS based on Goldmedia data

# ES - View time by genre and by region of origin

- National works are mostly concentrated on all other genres. In Spain, a major share of viewing of national works is live action films and other TV seasons.
- Documentaries from other European countries are slightly above the average thanks to titles such as *Dark Star: HR Gigers Welt* (CH).

Split of view time by region of origin and by genre  
In % of total viewtime in hours, Spain

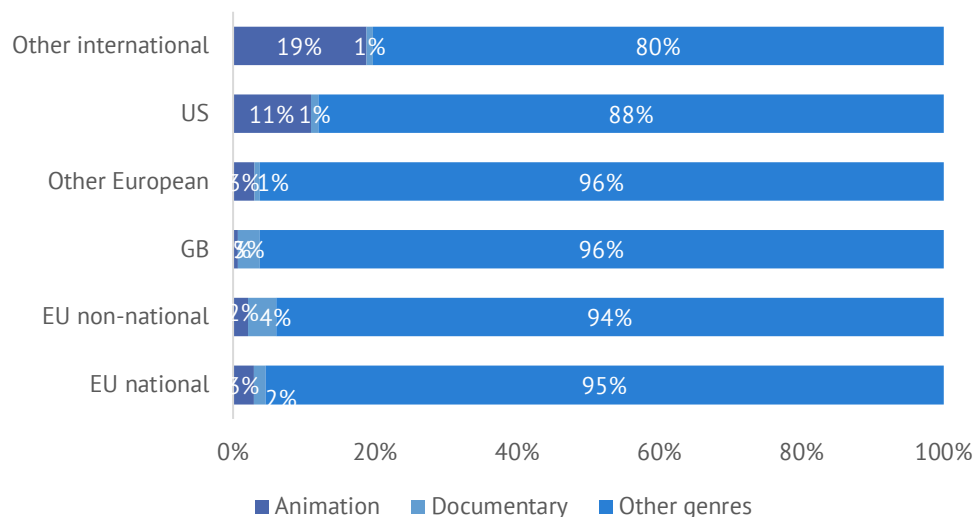


Source: OBS based on Goldmedia data

# FR - Viewing time by genre and by region of origin

- EU non-national documentary view time is above the average thanks partly to the success of *Money Heist: The Phenomenon* (ES) by Netflix, as in several other EU countries.
- Other international animation is above the average thanks to the success of Japanese mangas such as *Naruto* or *Pokémon*.

Split of view time by region of origin and by genre  
In % of total viewtime in hours, France

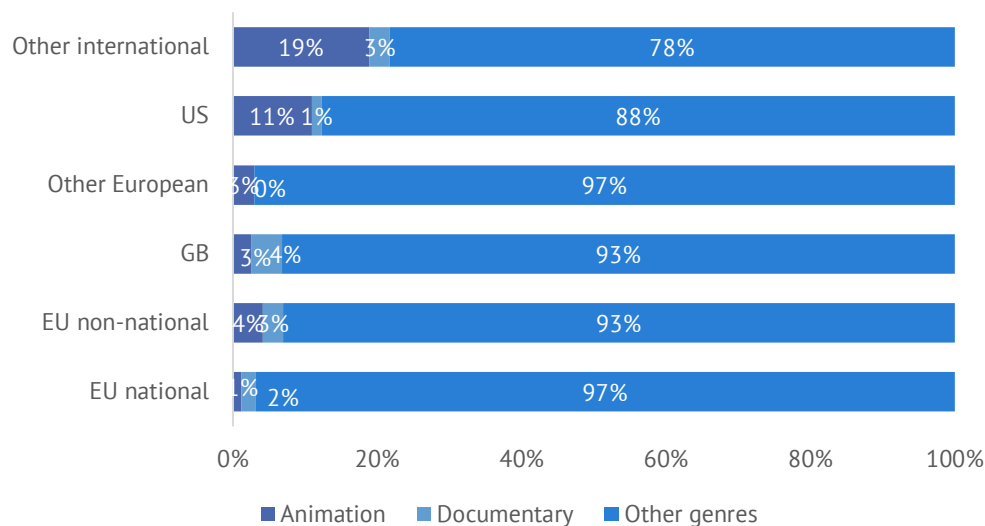


Source: OBS based on Goldmedia data

# FI - Viewing time by genre and by region of origin

- EU non-national animation works view time is above the EU9 average, thanks to works such as the Netflix animation movie *Klaus* (ES) or *The LEGO Movie 2* (DK).
- Finnish SVOD viewers also watched slightly more international documentaries than the EU9 average.

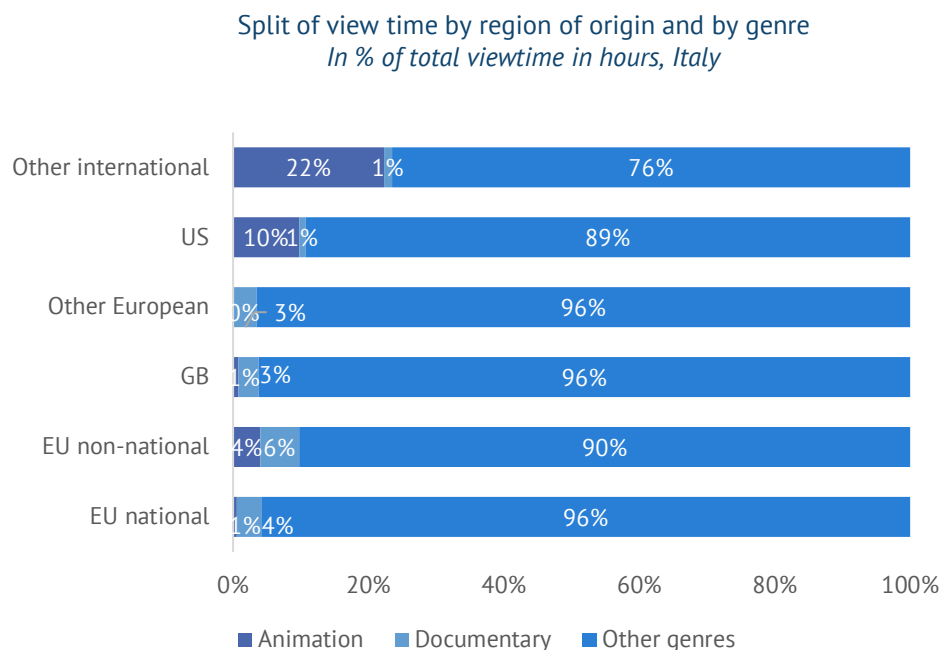
Split of view time by region of origin and by genre  
*In % of total viewtime in hours, Finland*



Source: OBS based on Goldmedia data

# IT - Viewing time by genre and by region of origin

- Italian documentaries were more viewed than the EU9 average for national documentaries, thanks to Amazon Prime national productions such as *Chiara Ferragni: Unposted* or *Diner Club*.
- There was also a higher share of viewtime for international animation than the EU9 average, with animation films and TV seasons produced in Japan and Canada ranking high.

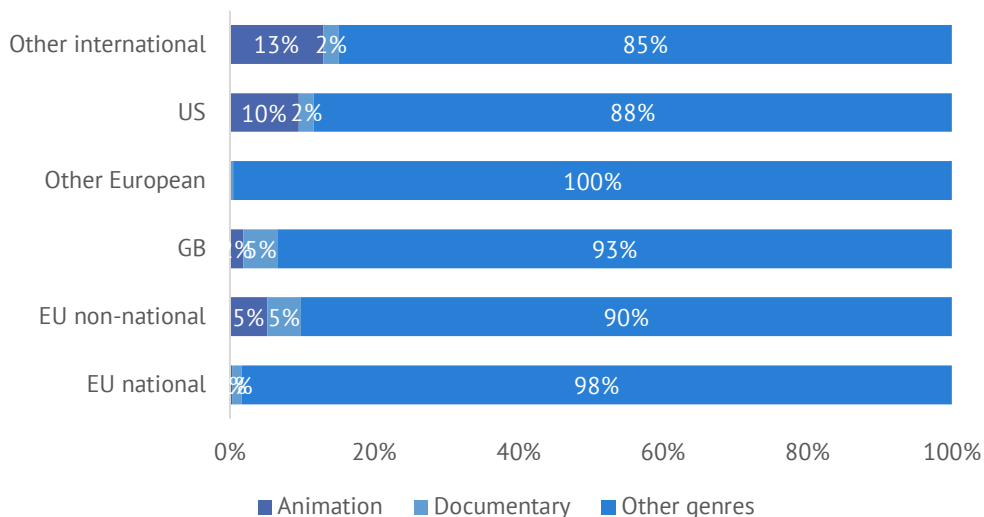


Source: OBS based on Goldmedia data

# NL - Viewing time by genre and by region of origin

- EU non-national documentaries view time is above the EU9 average thanks partly to the success of *Money Heist: The Phenomenon* (ES) by Netflix.
- EU non-national animations view time is above the EU9 average thanks to animation films like *Buurman & Buurman: Bakken En Grillen* (CZ) or *Asterix: The Secret of the Magic Potion* (FR).

Split of view time by region of origin and by genre  
In % of total viewtime in hours, Netherlands



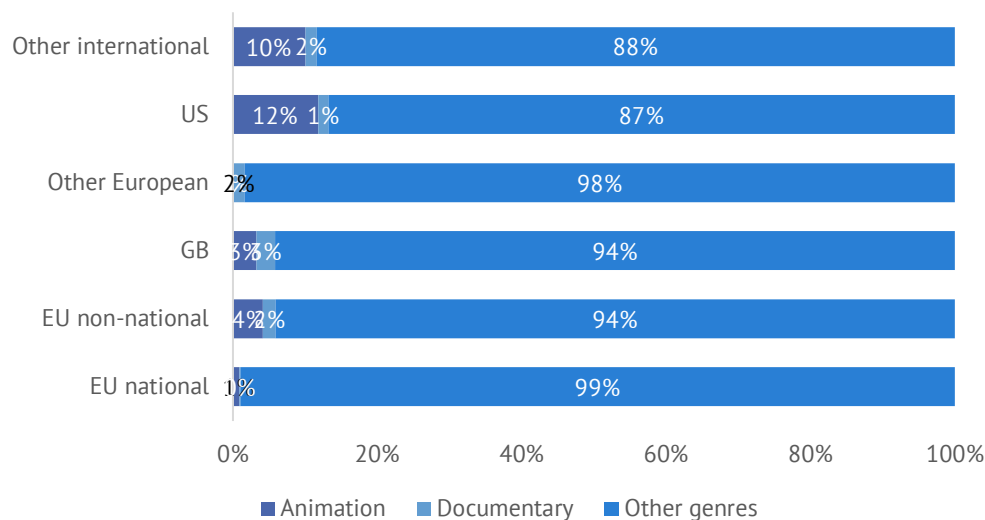
Source: OBS based on Goldmedia data



# PL - Viewing time by genre and by region of origin

- Animation content from GB is above the average thanks to the Netflix animation movie *The House*.
- With high viewing times for national works such as *The Witcher*, *Dziewczyny z Dubaju*, *365 Days* or *Jak zostałem gangsterem. Historia prawdziwa*, view time of national works is dominated by other genres for films and TV seasons, above the EU9 average of 96%.

Split of view time by region of origin and by genre  
*In % of total viewtime in hours, Poland*

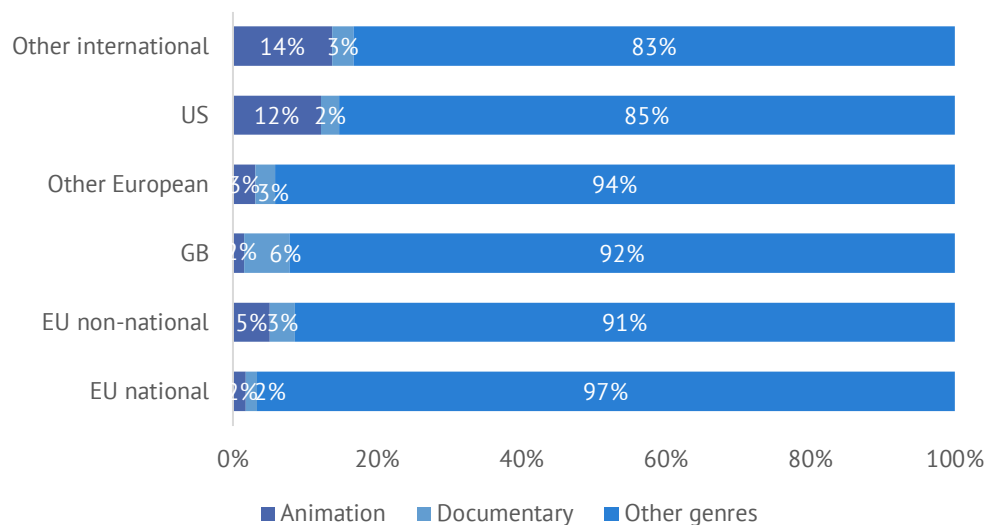


Source: OBS based on Goldmedia data

## SE - Viewing time by genre and by region of origin

- British documentaries with a view time of 6% of all British works were well represented thanks to titles like *Brasil 2002 - Os Bastidores do Penta*, *David Bowie: Finding Fame* or *Coldplay: A Head Full of Dreams*.
- View time for international animation was below the EU9 average with only 19% of view time for international works going to animation.

Split of view time by region of origin and by genre  
In % of total viewtime in hours, Sweden



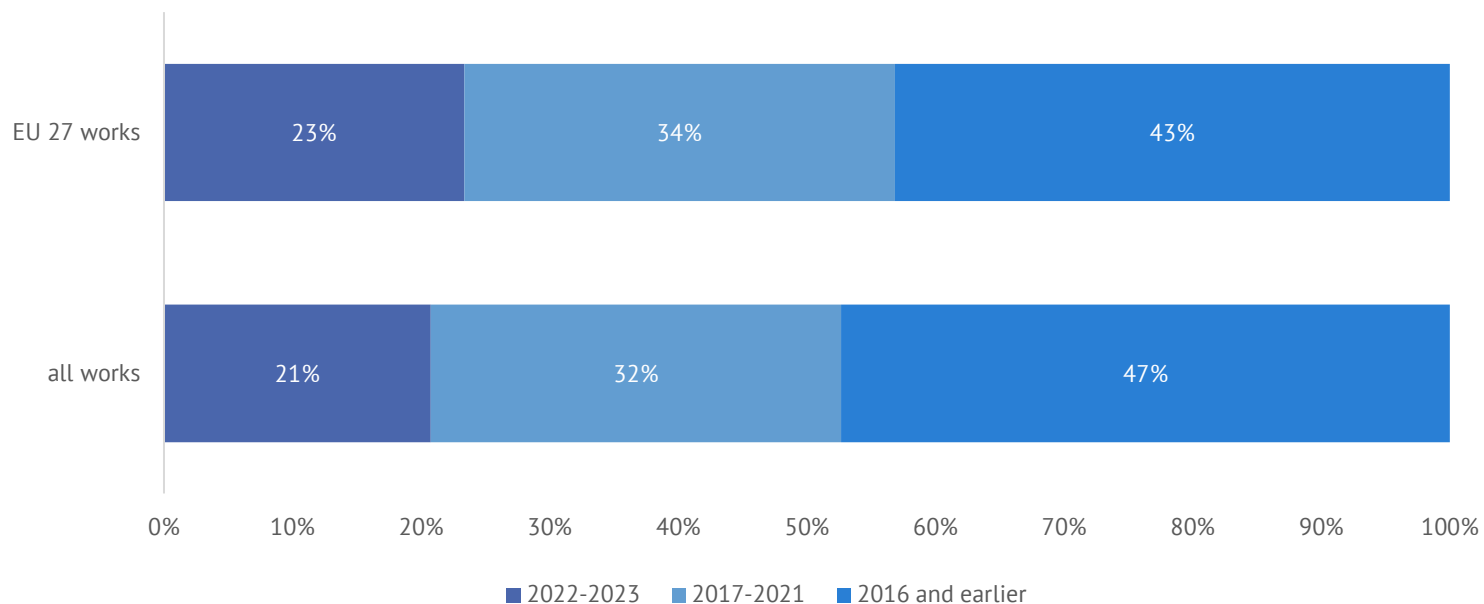
Source: OBS based on Goldmedia data

# Viewtime by region of origin and year of production

## DE – Share of viewtime of films by year of production

- While films produced in 2016 and earlier accounted for 97% of all films in the catalogue, they totalled 47% of all film viewing time. EU27 films accounted for 97% of all EU27 films in catalogues while the viewing of recent EU27 films represented 43% of the total. Thus, compared to the rest of the sample, Germans viewers tended to spend more time watching films produced before 2016 especially for EU 27 works (43% vs 33% of viewtime on average).
- Films produced between 2022 and 2023 accounted for 21% of total viewing time and less than 1% of films in catalogues (for EU27 films, their share also represented less than 1% of all EU27 films).

Films - Split of viewtime by origin and by year of production  
*In % of total viewtime in hours, Germany*



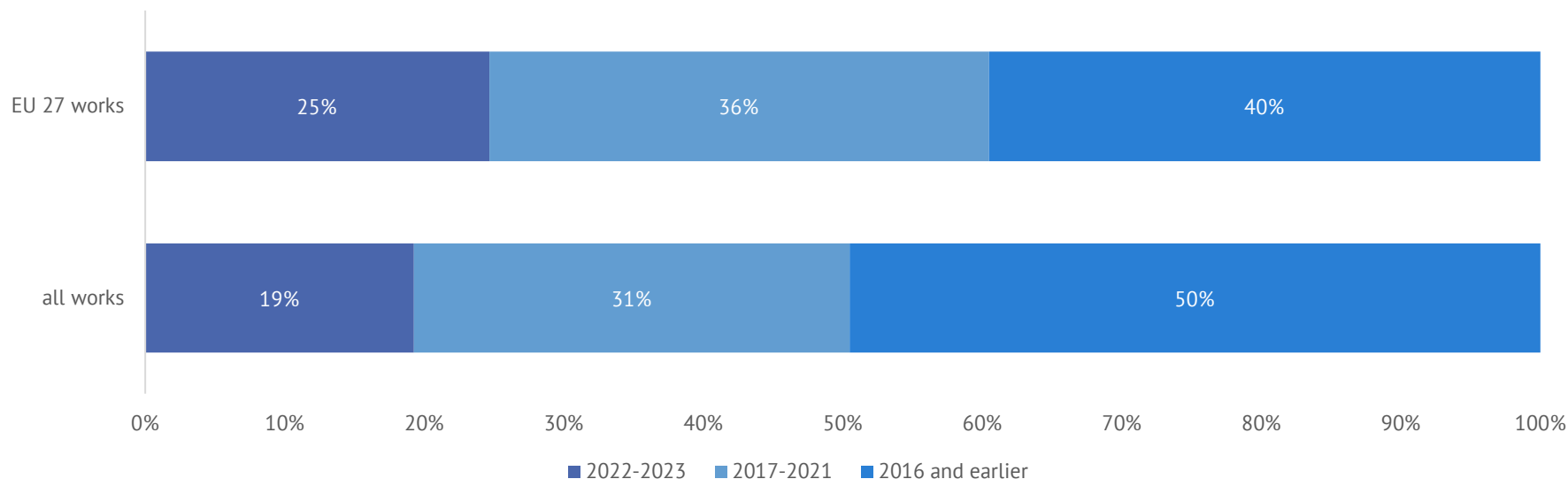
Source: OBS based on Goldmedia data

# DK – Share of viewtime of films by year of production

- Films produced in 2022 and 2023 accounted for only 2% of all films in the sample; they totalled 19% of all film viewing time. For EU27 films, this was similar: with only 3% of all EU27 films, the viewing of recent EU27 films represented 25% of all EU27 film viewing.
- Films produced between 2017 and 2021 accounted for 31% of total viewing time and 13% of films in the catalogues (for EU27 films, their share represented 15% of all EU27 films).
- The catalogue film (2016 and earlier) share of viewing was less than the catalogue film share of films in the sample. For EU27 catalogue films, they accounted for 40% of EU27 film viewing time but made up 82% of all EU27 films in the catalogues.

## Films - Split of viewtime by origin and by year of production

*In % of total viewtime in hours, Denmark*



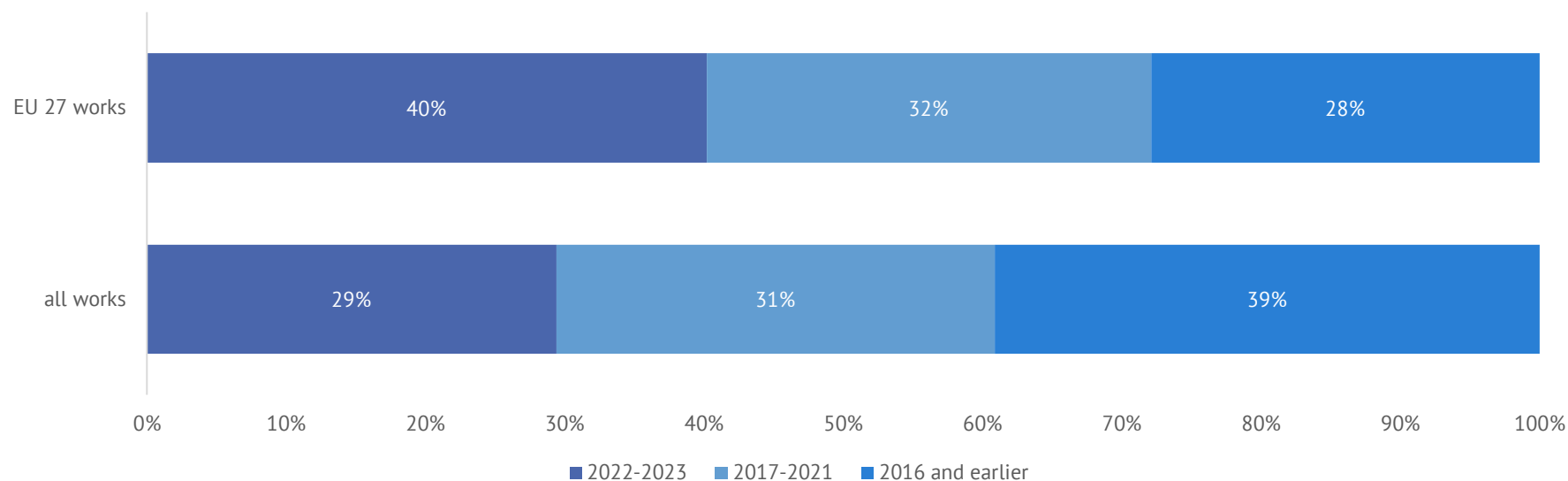
Source: OBS based on Goldmedia data

## ES – Share of viewtime of films by year of production

- Films produced in 2022 and 2023 accounted for less than 1% of all films in the sample; they totalled 29% of all film viewing time. For EU27 films, this was even starker: with less than 1% of all EU27 films, the viewing of recent EU27 films represented up to 40% of all EU27 film viewing.
- Thus, compared to the rest of the sample Spanish viewers tended to spend more time watching films produced in 2022 and 2023 especially for EU 27 works (40% vs 33% of viewtime on average for the sample).
- Films produced between 2017 and 2021 accounted for 31% of total viewing time and 4% of films in the catalogues (for EU27 films, their share represented 3% of all EU27 films).
- The catalogue film (2016 and earlier) share of viewing was less than the catalogue film share of films in the sample. For EU27 catalogue films, they accounted for 28% of EU27 film viewing time but made up 97% of all EU27 films in the catalogue.

Films - Split of viewtime by origin and by year of production

*In % of total viewtime in hours, Spain*

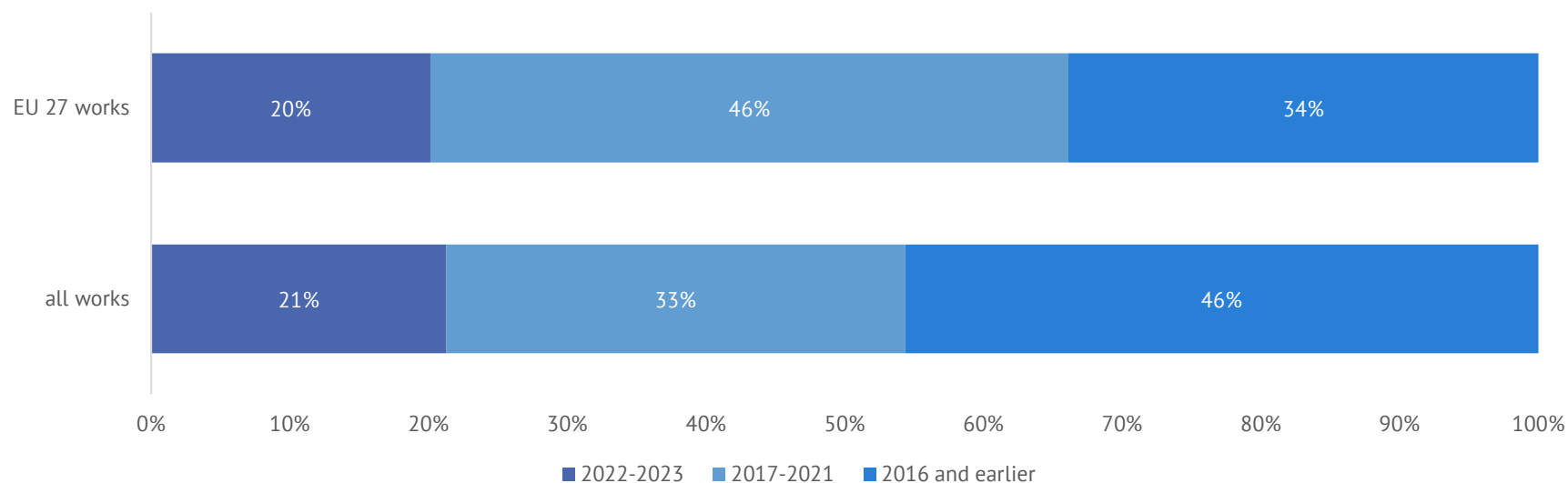


Source: OBS based on Goldmedia data

# FI – Share of viewtime of films by year of production

- While films produced in 2016 and earlier accounted for 83% of all films in the catalogue, they totalled 46% of all film viewing time. For EU27 films, with 78% of all EU27 films, the viewing of recent EU27 films represented 34% of all EU27 film viewing. Thus, compared to the rest of the sample Finnish viewers tended to spend more time watching films produced before 2016 (46% vs 43% of viewtime on average for the sample).
- Films produced in 2022 and 2023 accounted for only 5% of all films in the catalogue; they totalled 21% of all film viewing time. For EU27 films, with only 5% of all EU27 films, the viewing of recent EU27 films represented 20% of all EU27 film viewing.
- Films produced between 2017 and 2021 accounted for 33% of total viewing time and 14% of films in the catalogue (for EU27 films, their share represented 20% of all EU27 films).

**Films - Split** of viewtime by origin and by year of production  
*In % of total viewtime in hours, Finland*

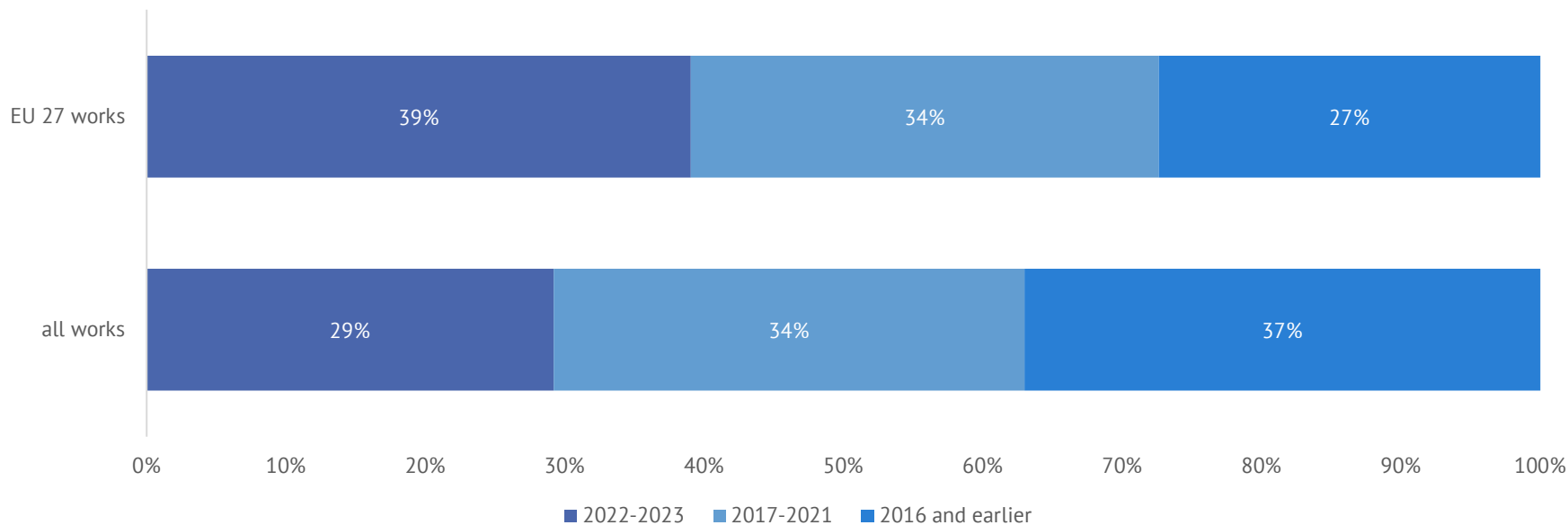


Source: OBS based on Goldmedia data

# FR – Share of viewtime of films by year of production

- Viewers prefer to watch more recent films. While films produced in 2022 and 2023 accounted for less than 1% of all films in the sample, they totalled 29% of all film viewing time. For EU27 films, this is even starker: with only 1% of all EU27 films, the viewing of recent EU27 films represented 39% of all EU27 film viewing.
- Films produced between 2017 and 2021 accounted for 34% of total viewing time and 6% of films in the catalogue (for EU27 films, their share represented 7% of all EU27 films).
- The catalogue film (2016 and earlier) share of viewing was less than the catalogue film share of films in the sample. For EU27 catalogues films, they accounted for 27% of EU27 film viewing time but made up 92% of all EU27 films in the catalogues.

Films - Split of viewtime by origin and by year of production  
*In % of total viewtime in hours, France*



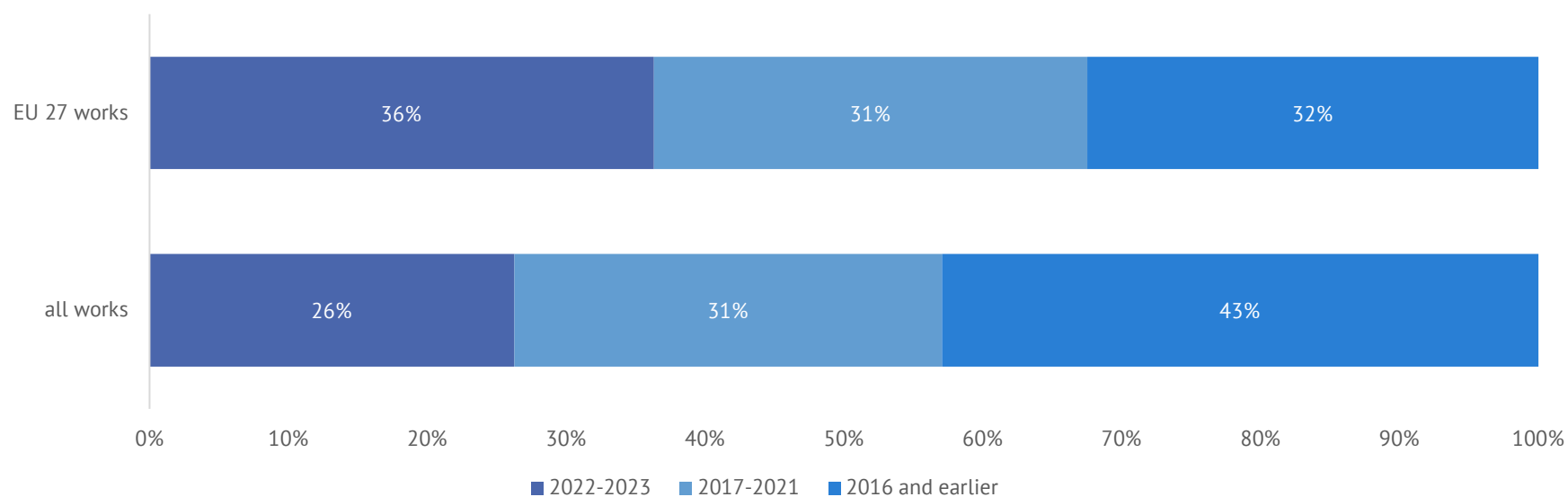
Source: OBS based on Goldmedia data



# IT – Share of viewtime of films by year of production

- Films produced in 2022 and 2023 accounted for 2% of all films in the catalogue, and they totalled 26% of all film viewing time. For EU27 films, this was even starker: with only 1% of all EU27 films, the viewing of recent EU27 films represented 36% of all EU27 film viewing.
- Films produced between 2017 and 2021 accounted for 31% of total viewing time and 8% of films in the sample (for EU27 films, their share also represented 8% of all EU27 films).
- The catalogue film (2016 and earlier) share of viewing was less than the share of films in the catalogue. For EU27 catalogue films, they accounted for 32% of EU27 film viewing time but made up 91% of all EU27 films in the catalogues.

Films - Split of viewtime by origin and by year of production  
*In % of total viewtime in hours, Italy*

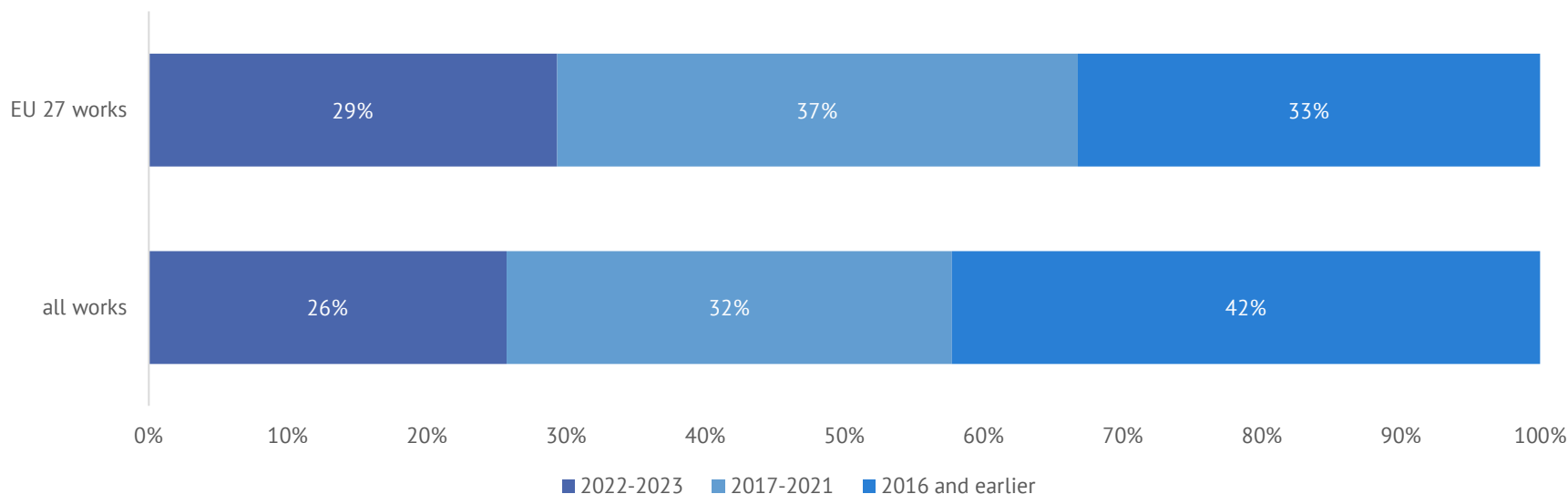


Source: OBS based on Goldmedia data

# NL – Share of viewtime of films by year of production

- Films produced in 2022 and 2023 accounted for only 3% of all films in the sample, and they totalled 26% of all film viewing time. For EU27 films, this was even starker: with only 2% of all EU27 films, the viewing of recent EU27 films represented 29% of all EU27 film viewing.
- Films produced between 2017 and 2021 accounted for 32% of total viewing time and 14% of films in the catalogues (for EU27 films, their share represented 16% of all EU27 films).
- The catalogue film (2016 and earlier) share of viewing was less than their share of films in the catalogue. For EU27 catalogue films, they accounted for 33% of EU27 film viewing time but made up 82% of all EU27 films in the catalogues.

Films - Split of viewtime by origin and by year of production  
*In % of total viewtime in hours, Netherlands*



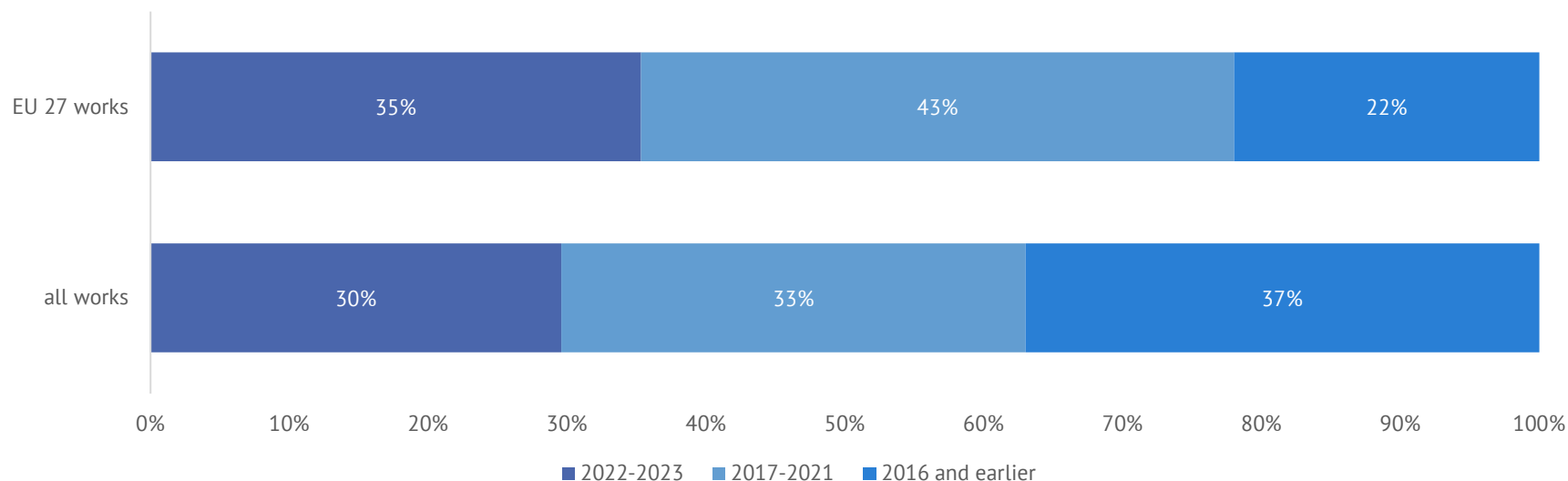
Source: OBS based on Goldmedia data

# PL – Share of viewtime of films by year of production

- Films produced in 2022 and 2023 are overrepresented in the consumption. They accounted for only 3% of all films in the catalogue but they totalled 30% of all film viewing time. For EU27 films, this was even starker: with only 2% of all EU27 films, the viewing of recent EU27 films represented 35% of all EU27 film viewing.
- Films produced between 2017 and 2021 accounted for 33% of total viewing time and 14% of all-works films in the catalogue and 18% of EU27 films.
- The catalogue films (2016 and earlier) share of viewing was less than their share of films in the sample. For EU27 catalogue films, they accounted for 22% of EU27 film viewing time but made up 80% of all EU27 films in the catalogues.

Films - Split of viewtime by origin and by year of production

*In % of total viewtime in hours, Poland*



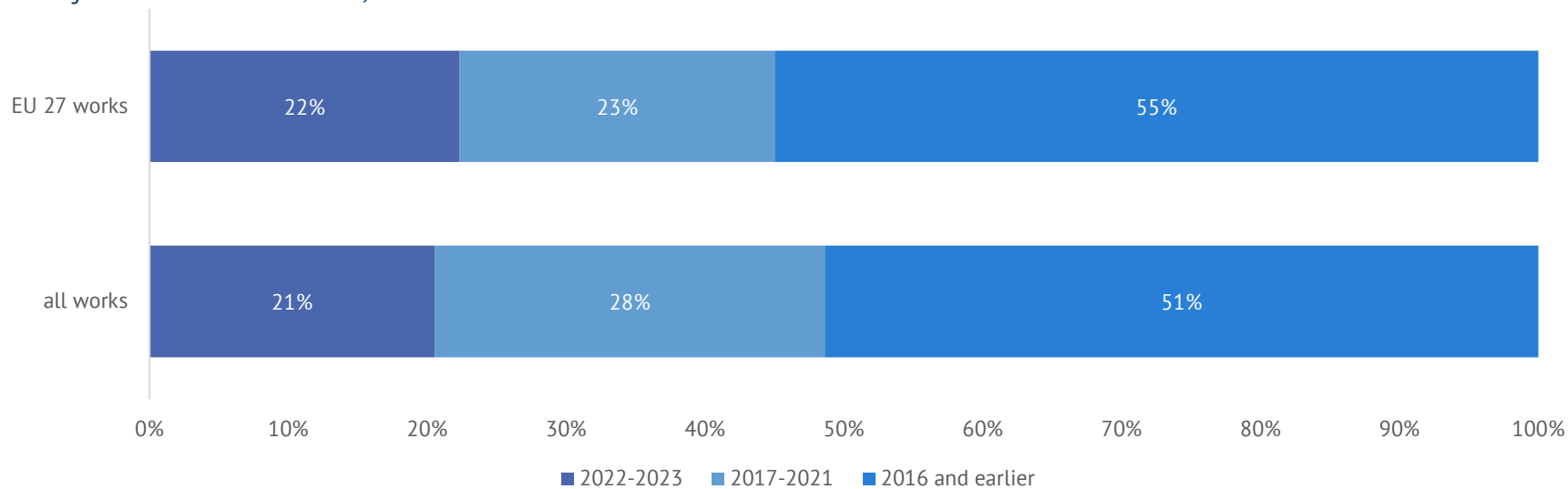
Source: OBS based on Goldmedia data

## SE – Share of viewtime of films by year of production

- While films produced in 2016 and earlier accounted for 85% of all films in the catalogue, they totalled 51% of all film viewing time. For EU27 films, with 78% of all EU27 films, the viewing of recent EU27 films represented 55% of all EU27 film viewing. Thus, compared to the rest of the sample Swedish viewers tend to spend more time watching films produced before 2016, especially for EU 27 works (55% vs 33% of viewtime on average for the sample).
- Films produced in 2022 and 2023 accounted for only 2% of all films in the catalogue, but they totalled 21% of all film viewing time. For EU27 films, this was starker: with only 2% of all EU27 films, the viewing of recent EU27 films represented 22% of all EU27 film viewing.
- Films produced between 2017 and 2021 accounted for 28% of total viewing time and 12% of films in the catalogue for all works and 18% for EU27 films.

Films - Split of viewtime by origin and by year of production

*In % of total viewtime in hours, Sweden*



Source: OBS based on Goldmedia data

## **Part 4: SVOD catalogues – focus on 9 EU countries**

**Catalogues by origin for films and TV seasons**

**Catalogues by origin and genre**

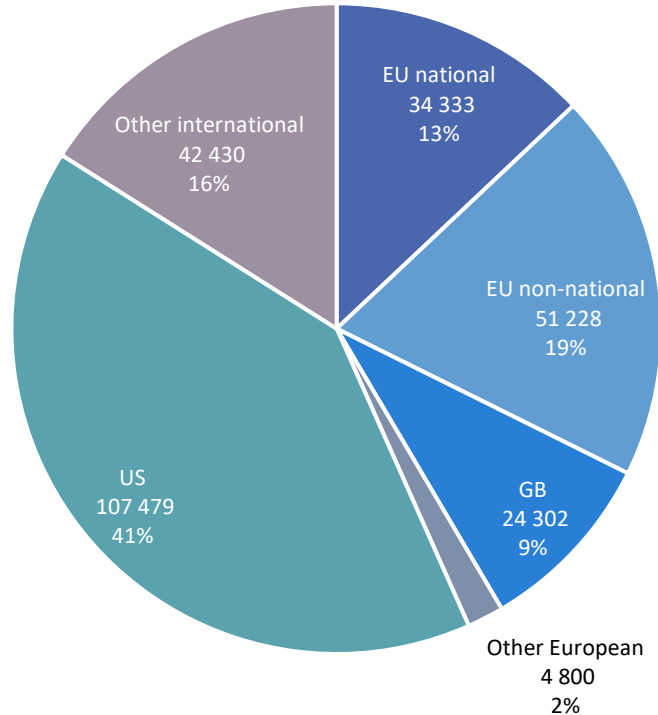
**Catalogues by origin and year of production**

**For DE, DK, ES, FI, FR, IT, NL, PL, SE**

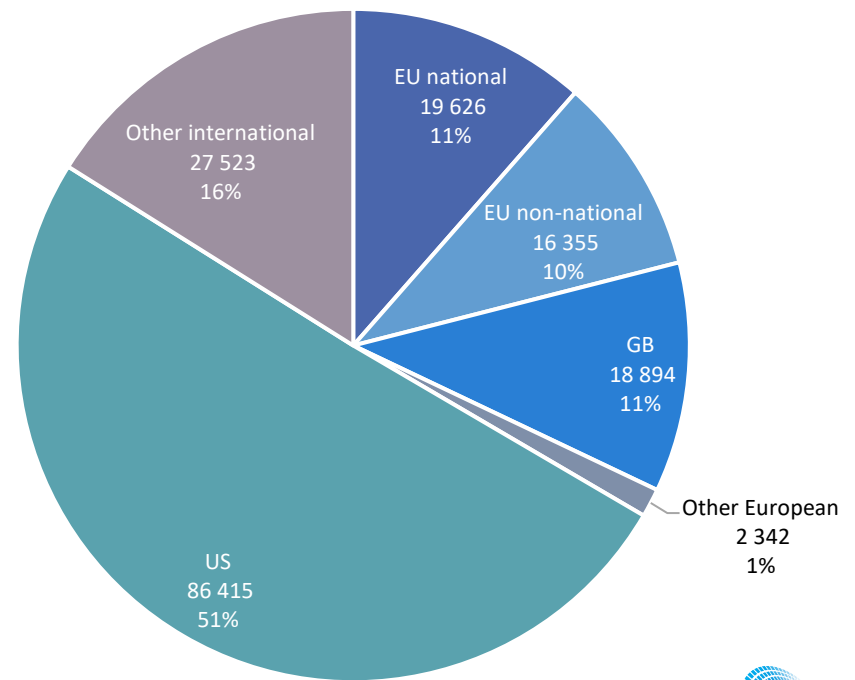
# The composition of film and TV season SVOD catalogues by region of origin

- These data show the origin of films and TV seasons in SVOD catalogues over a period of one year.
- European works accounted for respectively 43% and 33% of film and TV season catalogues, in the one-year period this report covers, on SVOD services.
- 41% of the film catalogues and 51% of the TV season catalogues were produced in the US, while 16% of all films and TV seasons were produced in other world regions.

Origin of 264 572 films in the catalogues by country of origin  
*In number of films*



Origin of 171 155 TV seasons in the catalogues by country of origin  
*In number of TV seasons*

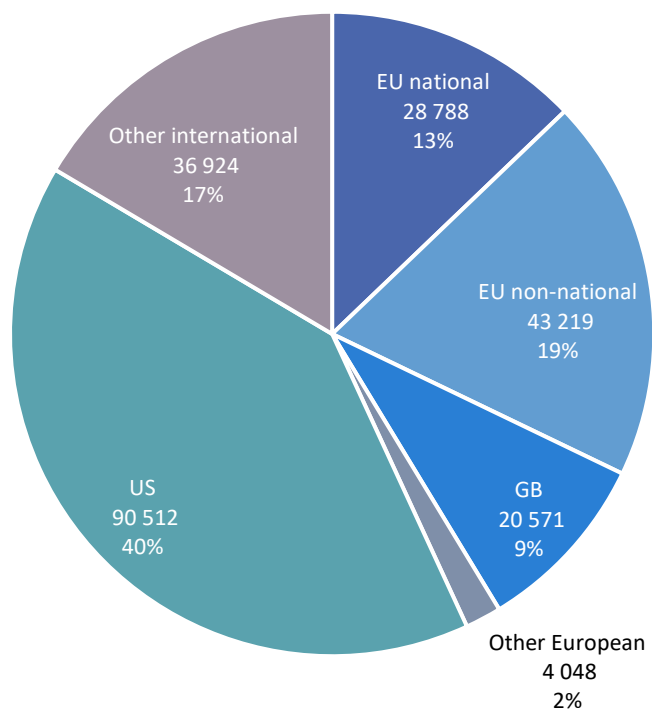


Source: OBS based on Goldmedia data

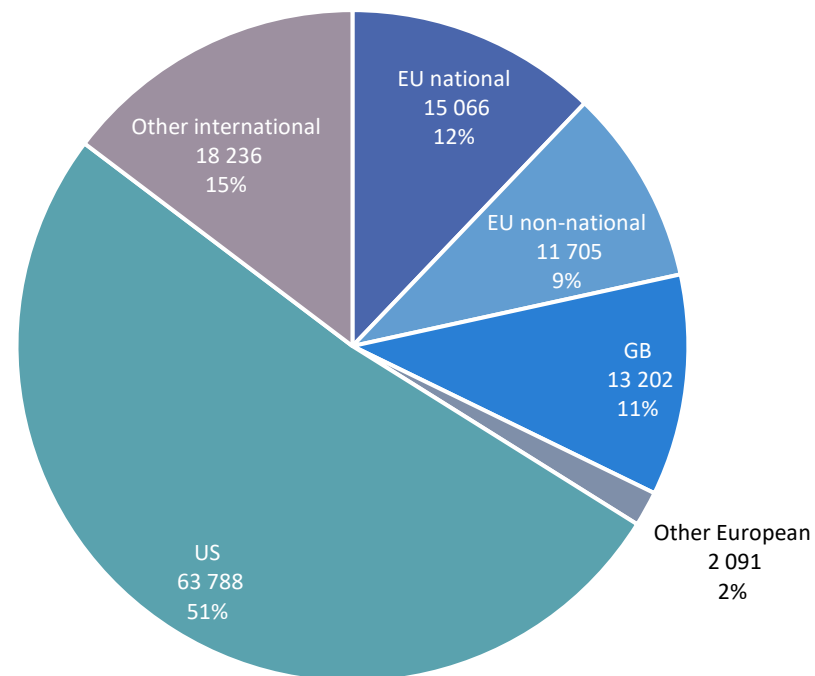
# The composition of catalogues of other fiction works by region of origin

- European works accounted for respectively 43% and 34% of live-action films and TV seasons available in SVOD catalogues in the one-year period.
- 40% of the live-action films in the catalogues and 51% of all other TV season genres in the catalogues were from the US.

Origin of 224 062 live-action films in the catalogues by country of origin - *In number of films*



Origin of 124 088 other-genre TV seasons in the catalogues by country of origin - *In number of TV seasons*

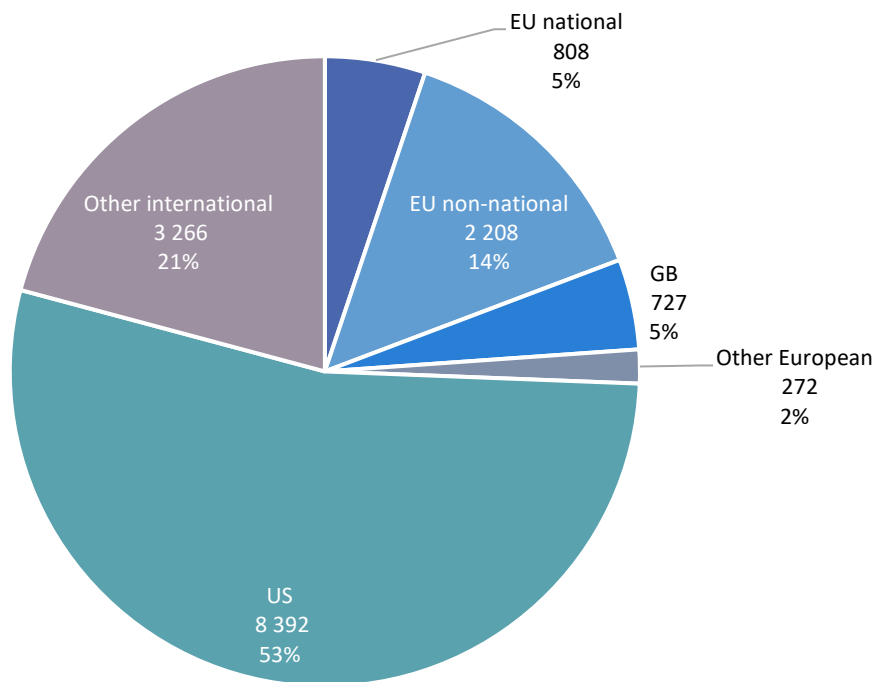


Source: OBS based on Goldmedia data

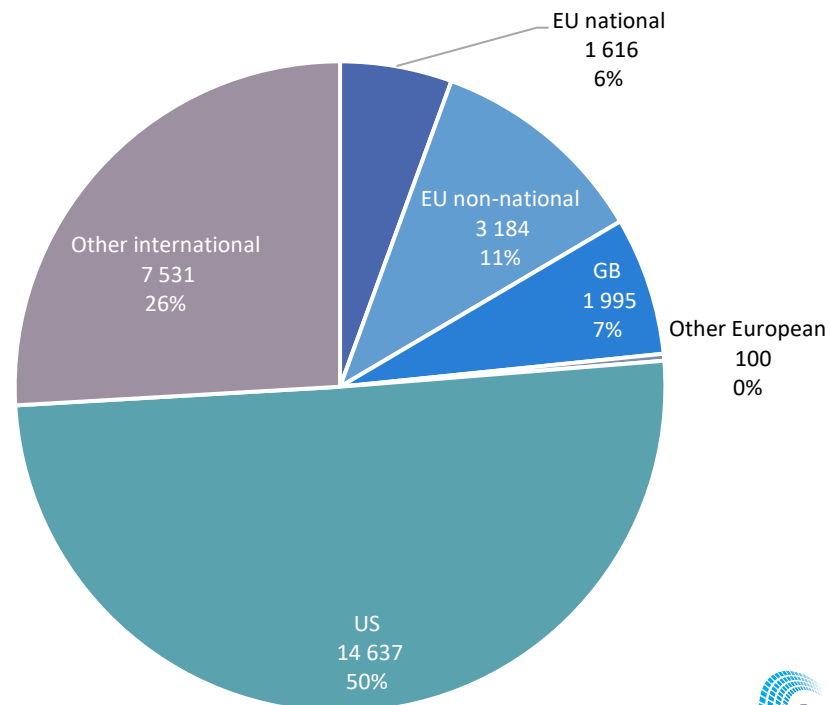
# The composition of catalogues of animation works by region of origin

- European animation works accounted for respectively 26% and 24% of all animation films and TV seasons in the SVOD catalogues.
- 53% of the animation films in the catalogues and 50% of animation TV-season catalogues were produced in the US.
- With 26% of all animated TV seasons and 21% of all animation films, international works had a much higher share than for other genres, showing the predominance of international animation versus European animation in view time.

Origin of 15 673 animation films in the catalogues by country of origin - *In number of films*



Origin of 29 063 animation TV seasons in the catalogues by country of origin - *In number of TV seasons*



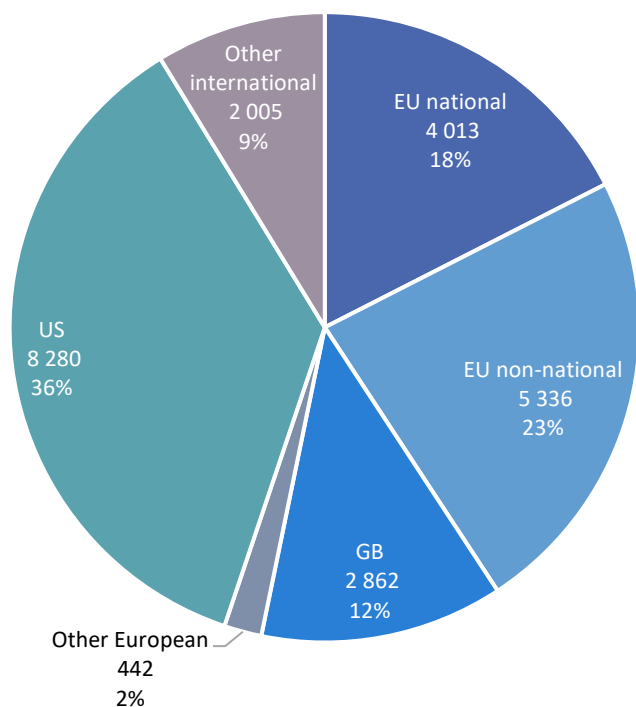
Source: OBS based on Goldmedia data



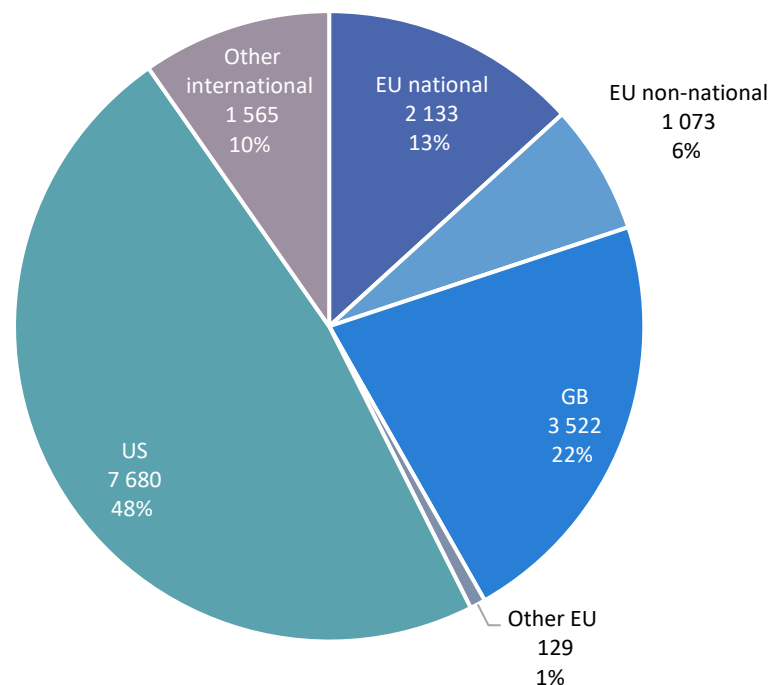
# The composition of catalogues of documentaries by region of origin

- European documentaries accounted for respectively 55% and 43% of documentary films and TV seasons in the catalogues.
- 36% of all documentary films and 47% of all documentary TV seasons in the SVOD catalogues were produced in the US.

Origin of 22 938 documentary films in the catalogues by country of origin - *In number of films*



Origin of 16 102 documentary TV seasons in the catalogues by country of origin - *In number of TV seasons*

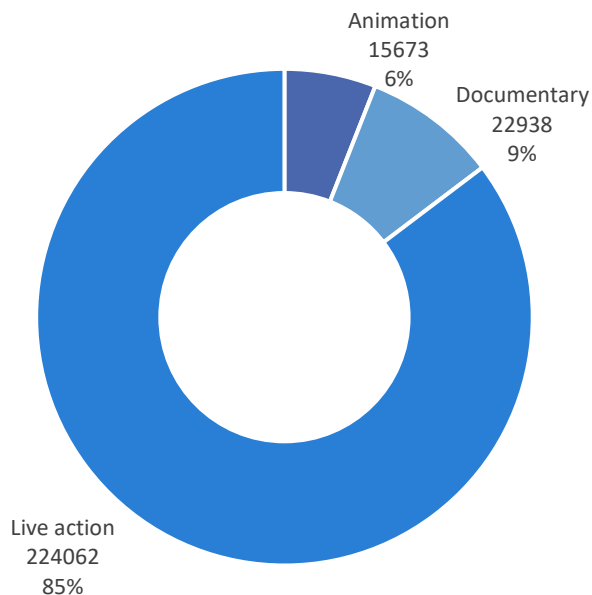


Source: OBS based on Goldmedia data

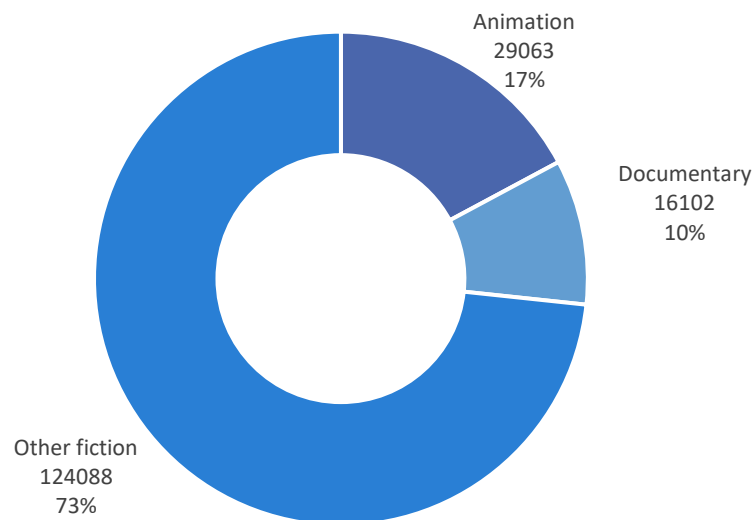
# The catalogue of works by genre

- When looking at genres, the catalogues were made up of live action films (all fiction films which are not classified as animation or documentaries) and other TV seasons (all other genres of TV series which are not animation or documentaries, e.g. drama, action, fantasy, YA, ...) with 85% and 73% respectively.
- Animation made up 6% of the films in the catalogues and 17% of the TV seasons.
- Documentaries accounted for 9% of all films and 9.5% of TV seasons in the sample of measured works.

Genre of 262 673 films in the catalogue  
*In number of films*



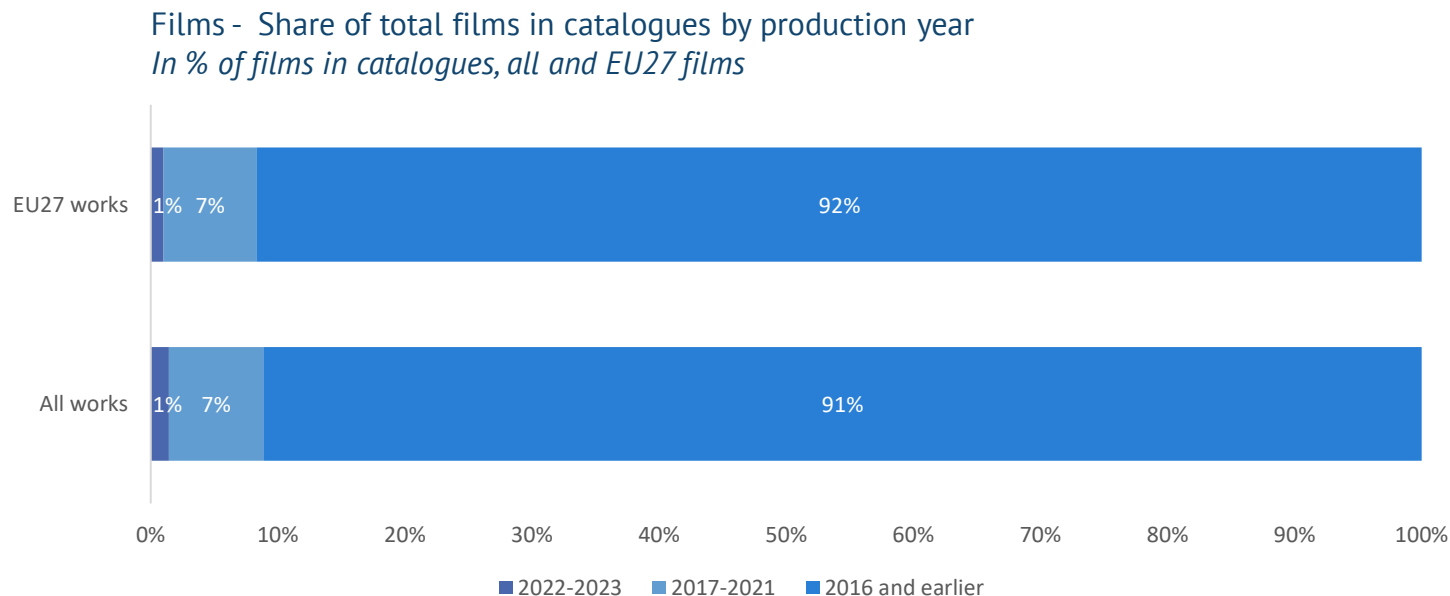
Genre of 169 253 TV seasons in the catalogue  
*In number of TV seasons*



Source: OBS based on Goldmedia data

# Films in the SVOD catalogues by year of production

- Recent films (2022-23) accounted for respectively 1% of the catalogue for all works and EU27 works but represented 25% of view time of all films and even 33% of view time for EU27 films.
- Films produced between 2017 and 2021 accounted for 7% of the catalogue for all and EU27 films and represented 32% of view time for all films and 34% of view time for EU27 films.
- Catalogue films, films produced in 2016 and earlier, accounted for respectively 91% and 92% of all and EU27 films available in catalogues and represented the lion's share of films available to SVOD subscribers but accounted for 42% of view time for all films and 33% of view time for EU27 films.

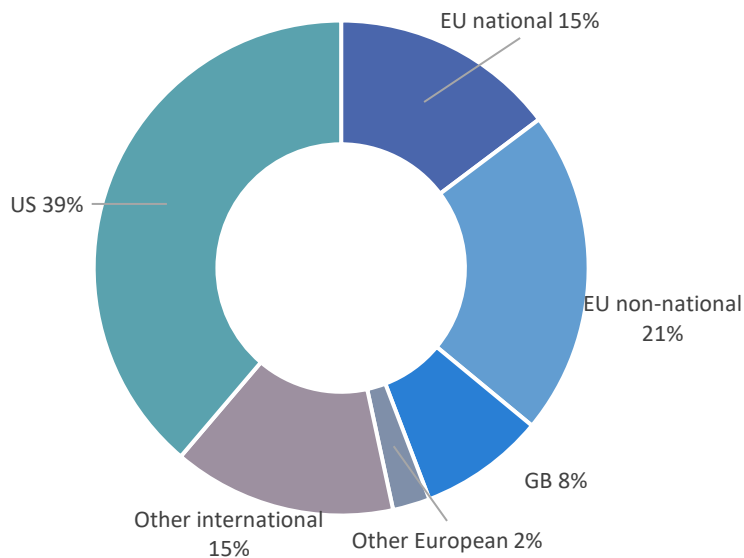


Source: OBS based on Goldmedia data

# DE – The highest share of European content in catalogues

- Germany is the country where the share of European content is the highest for TV seasons in SVOD catalogues, mainly because of a high share of national TV seasons compared to the EU9 average of 11%.
- This is also due to the high number of German SVOD services in the sample.

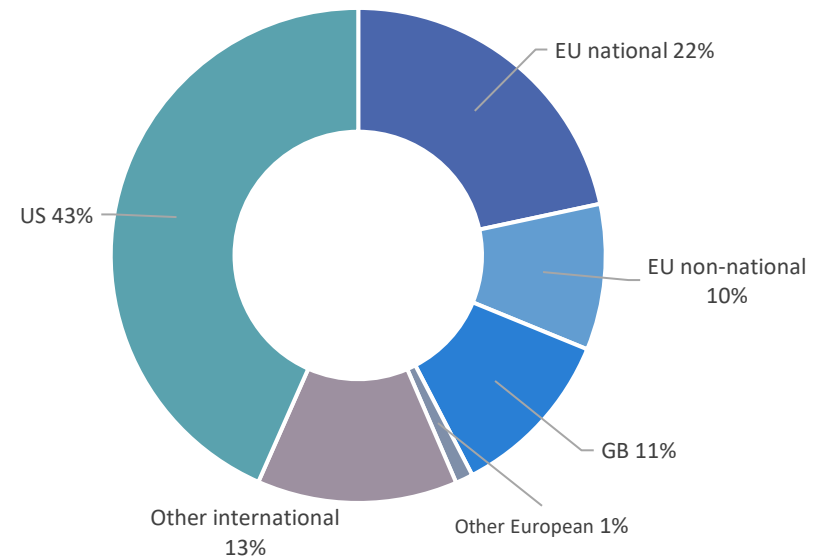
Films - Split of catalogue by origin  
*By origin of title, Germany*



**Share of European works:**

**Films 46%**  
**TV seasons 44%**

TV - Split of catalogue by origin  
*By origin of title, Germany*

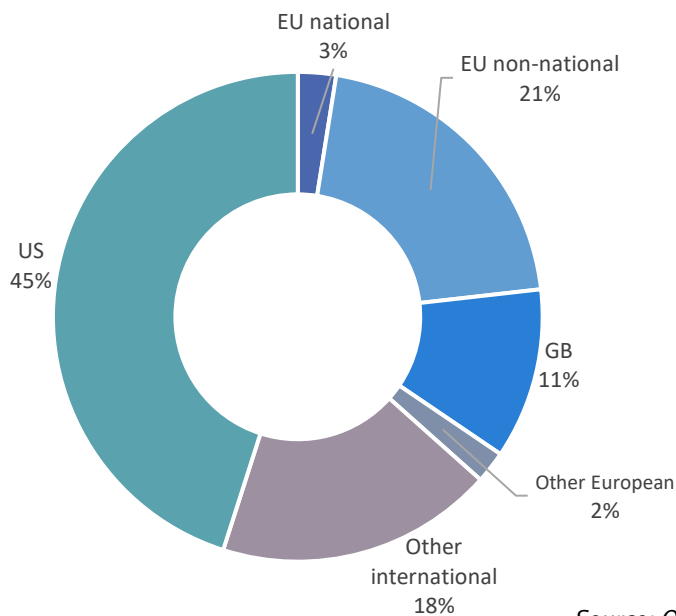


Source: OBS based on Goldmedia data

# DK – Above-average share for British works

- Denmark is the country where the share of British works is highest for TV seasons compared to the EU9 average, with a share of 15% versus 11%.
- The share of national works, for films or TV seasons, was well below the EU9 average with only 3% national films (vs 13% EU average) and 2% national TV seasons (vs 11% EU9 average).

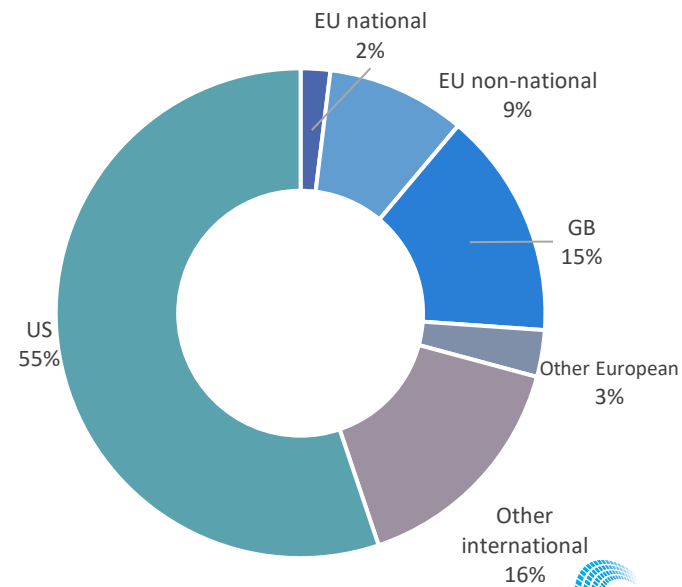
Films - Split of catalogue by origin  
*By origin of title, Denmark*



Share of European works:

**Films 37%**  
**TV seasons 29%**

TV - Split of catalogue by origin  
*By origin of title, Denmark*

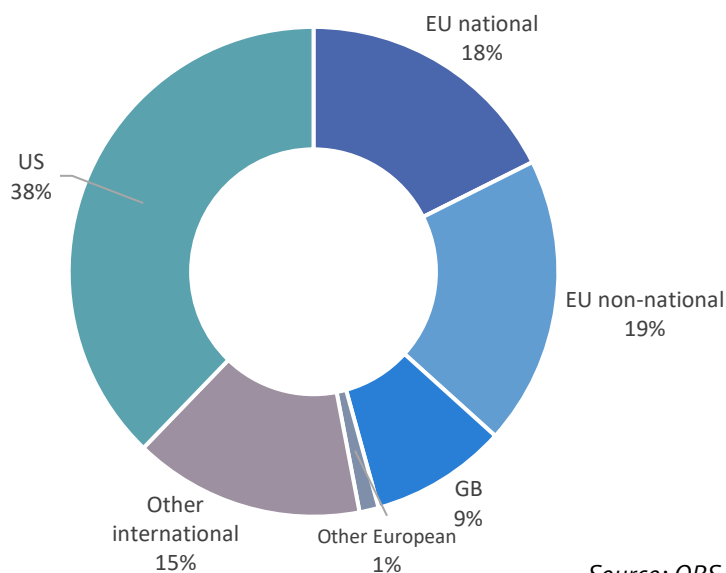


Source: OBS based on Goldmedia data

# ES – Highest share of European works in film catalogues

- Spain is the country where the share of European content is the highest in the film catalogues with 47% compared to the EU9 average of 43%, due to a higher share of Spanish films, with 18% compared to the EU9 average of 13% for national films.
- Even with increased original productions by streamers, the share of Spanish TV seasons is only slightly above the EU9 average for national TV seasons with 14% versus 11%.

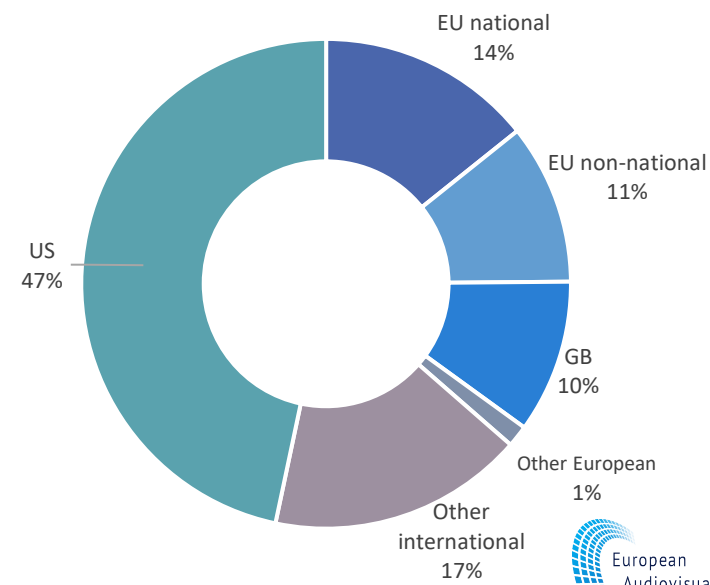
Films - Split of catalogue by origin  
*By origin of title, Spain*



Share of European works:

**Films 47%**  
**TV seasons 36%**

TV - Split of catalogue by origin  
*By origin of title, Spain*

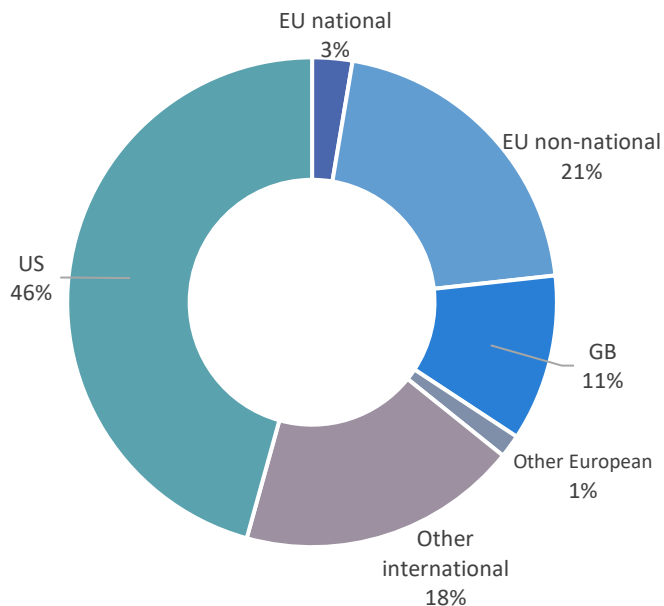


Source: OBS based on Goldmedia data

# FI - Low share of national films and TV seasons

- Most of the European content comes from EU non-national or GB for both film and TV season catalogues.

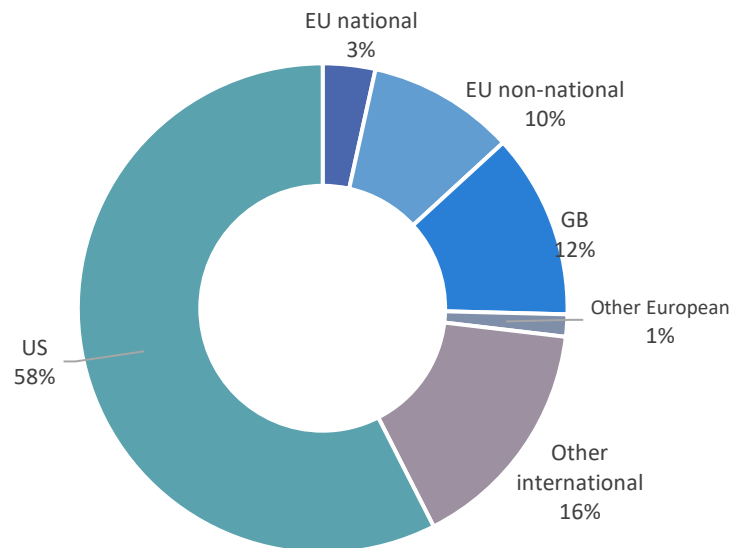
Films - Split of catalogue by origin  
*By origin of title, Finland*



Share of European works:

Films 36%  
TV seasons 26%

TV - Split of catalogue by origin  
*By origin of title, Finland*

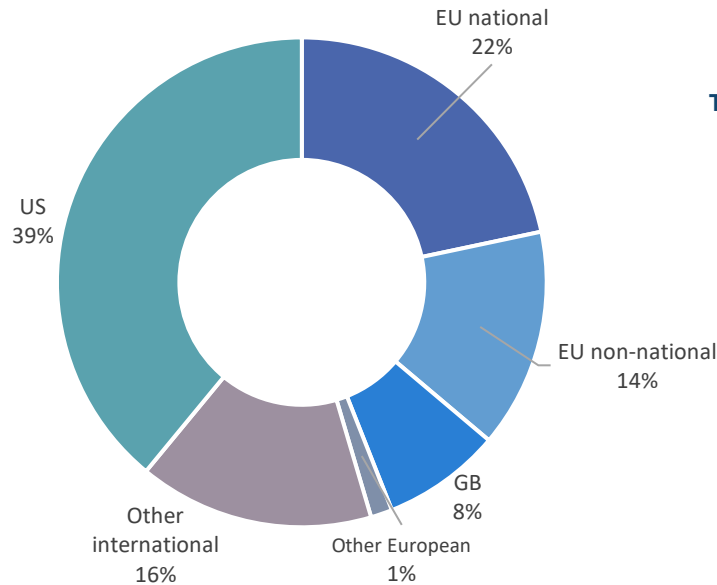


Source: OBS based on Goldmedia data

# FR – The highest share of national content in catalogues

- France is the only country of the sample where national content was more represented than EU non-national content in both film and TV season catalogues.
- The share of 22% for French films was well above the EU9 average of 13%, which might be due to France's strong film production sector.
- France's SVOD catalogues also had a slightly lower share of US and British films and TV seasons than the EU9 average.

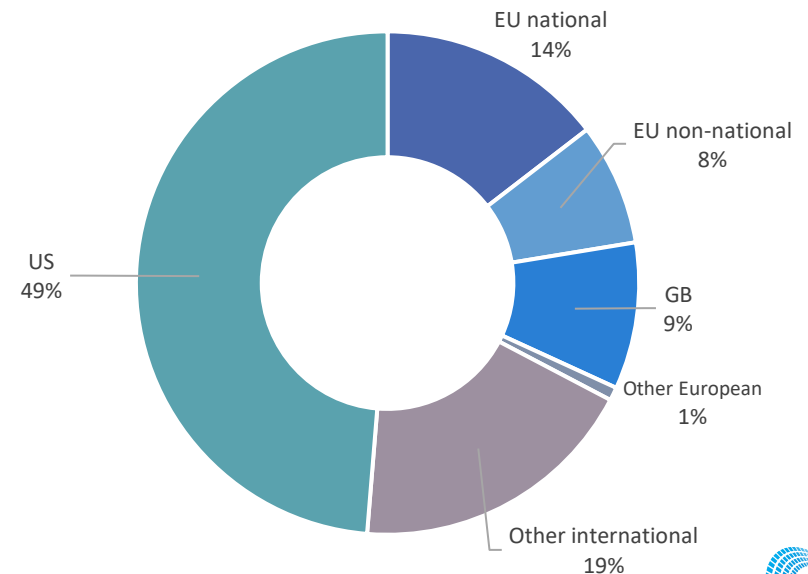
Films - Split of catalogue by origin  
*By origin of title, France*



Share of European works:

Films 45%  
TV seasons 32%

TV - Split of catalogue by origin  
*By origin of title, France*



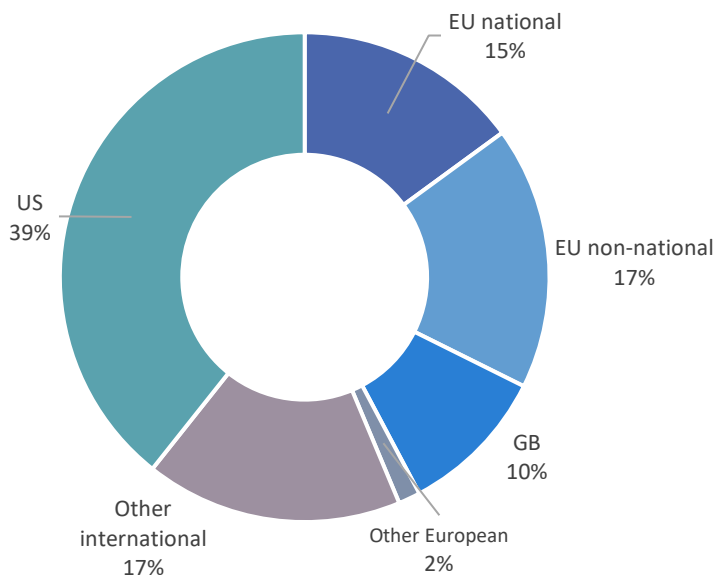
Source: OBS based on Goldmedia data



# IT – High proportion of European works in film catalogues

- Italy is the country where the difference in the share of European works between film and TV season catalogues is the biggest.
- With only 24% of European TV seasons, Italy is well under the 33% EU9 average. This comes mainly from a lower share of national TV seasons, with only 5% compared to the EU9 average of 11%.

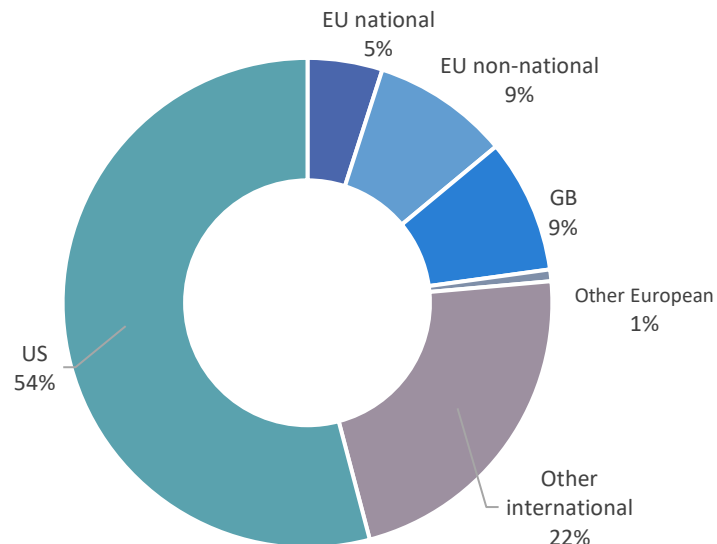
Films - Split of catalogue by origin  
*By origin of title, Italy*



Share of European works:

Films 44%  
TV seasons 24%

TV - Split of catalogue by origin  
*By origin of title, Italy*

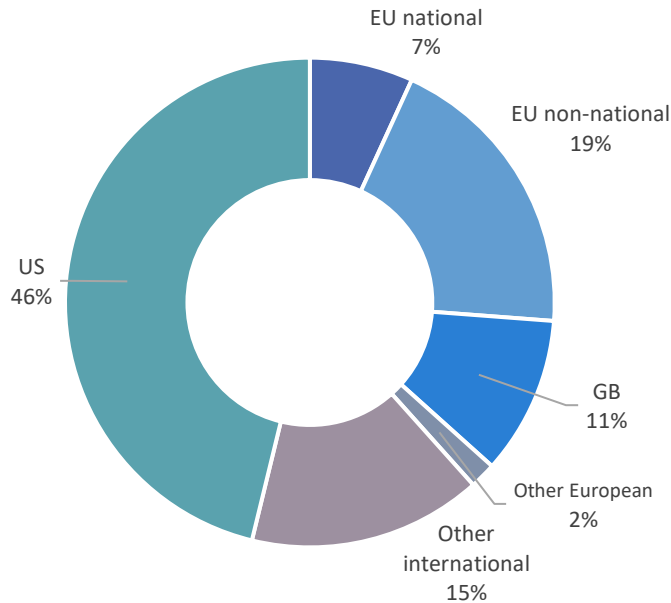


Source: OBS based on Goldmedia data

# NL – Low share of national works in catalogues

- European works, whether TV seasons or films, mainly comprised EU non-national and British works.
- Dutch SVOD catalogues had a below-average share of national works compared to the EU 9 (7% of national films vs 13%; 4% of national TV seasons vs 11%).
- At the same time during the one-year period, Dutch SVOD catalogues had an above-average share of US works (46% of films compared to 41% for the EU9 average, 58% for TV seasons compared to an EU9 average of 51%).

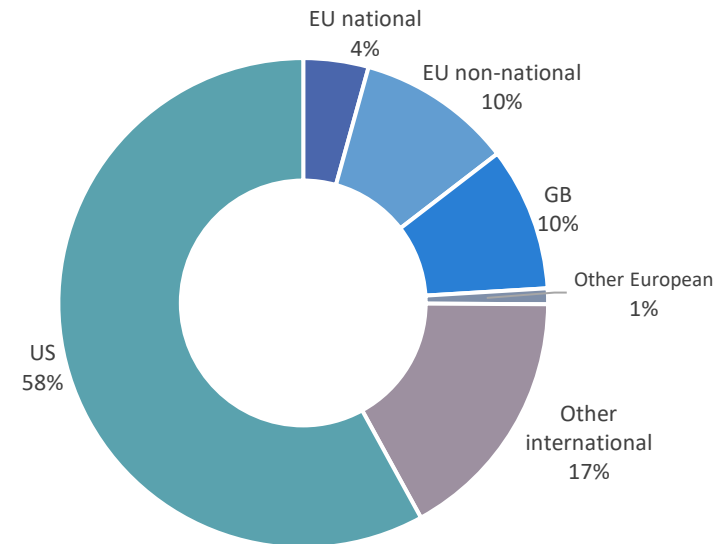
Films - Split of catalogue by origin  
*By origin of title, Netherlands*



Share of European works:

Films 39%  
TV seasons 25%

TV - Split of catalogue by origin  
*By origin of title, Netherlands*

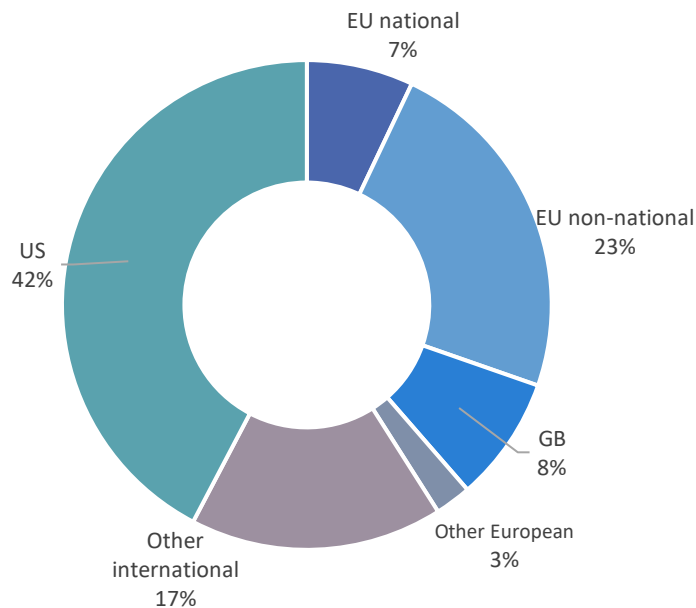


Source: OBS based on Goldmedia data

# PL – Highest share of EU non-national works in films and TV catalogue

- Poland is the country where the share of EU non-national content is the highest in both the film and the TV season catalogues.

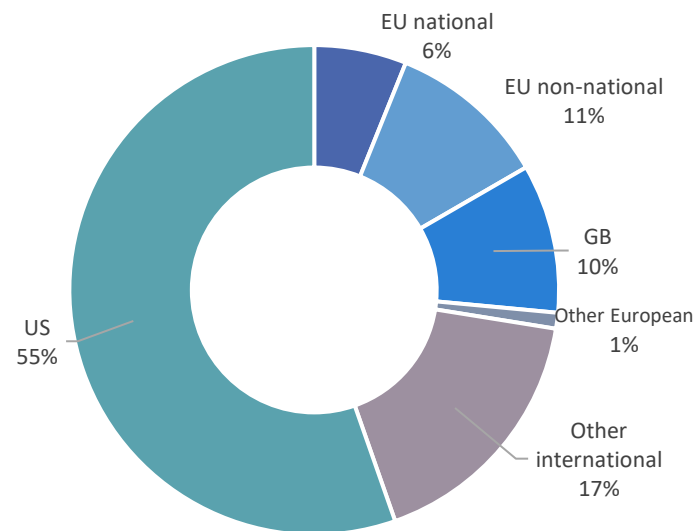
Films - Split of catalogue by origin  
*By origin of title, Poland*



Share of European works:

Films 41%  
TV seasons 28%

TV - Split of catalogue by origin  
*By origin of title, Poland*



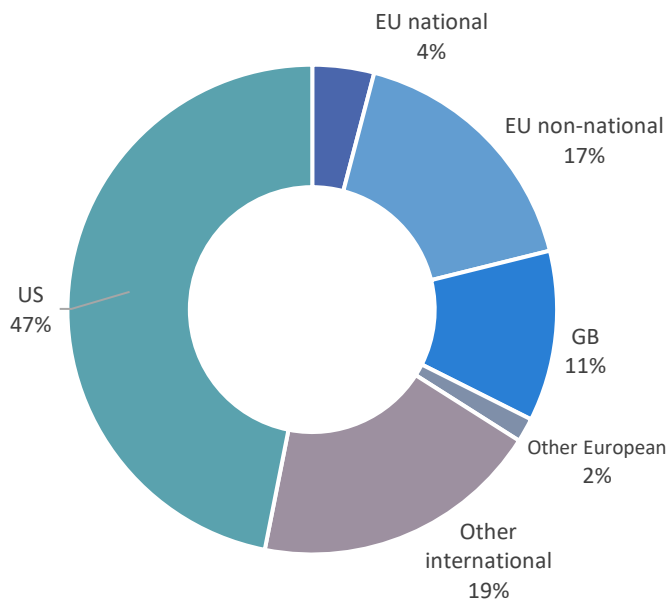
Source: OBS based on Goldmedia data

# SE – Lower share of national works, higher share of British works

- As was the case in other medium-volume-producing countries, most European works are either EU non-national or British.
- Swedish SVOD catalogues had an above-average share of US films and TV seasons.

Films - Split of catalogue by origin

*By origin of title, Sweden*

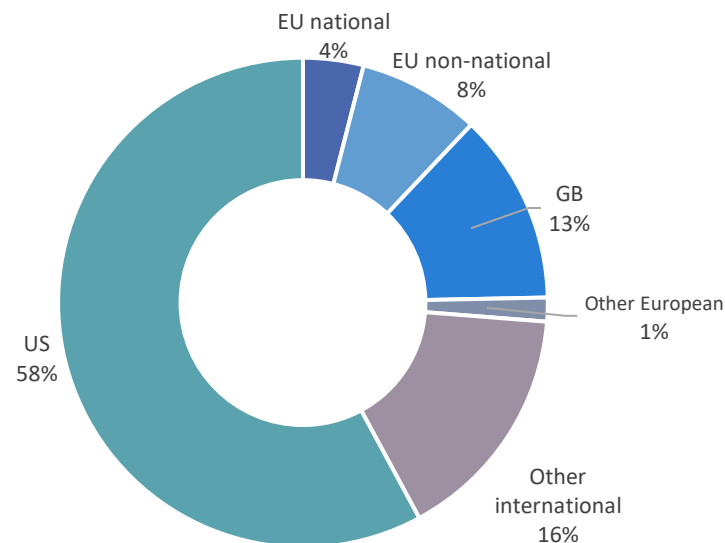


**Share of European works:**

**Films 34%**  
**TV seasons 26%**

TV - Split of catalogue by origin

*By origin of title, Sweden*



Source: OBS based on Goldmedia data

# More information:

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