

The impact of cinema admissions on SVOD usage – 2024 data

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Introduction and methodology

The aim of this report is to understand the relationships between subscription video-on-demand (SVOD) consumption and cinema admissions in nine EU countries (Denmark, Finland, France, Germany, Italy, Netherlands, Poland, Spain and Sweden).

The report addresses the following research questions:

- How do national films compare in offers and performance between cinemas and SVOD?
- How do films that were released in cinemas perform on SVOD compared to films that were not?
- How do originals perform on SVOD?
- How do films perform on SVOD based on their number of released cinema markets?
- How do films perform on SVOD based on their theatrical admissions?
- How do the top 100 films in cinemas since 2019 perform on SVOD?

Introduction and methodology

▪ Source of the data

- The SVOD data were provided by Digital i for 4 major service providers (Netflix, Prime video, HBO Max, Disney+)* in 9 countries (Denmark, Finland, France, Germany, Italy, Netherlands, Poland, Spain and Sweden).

These 4 service providers represented almost 70% of subscribers and 64% of revenues in EU27 in 2024 (European Audiovisual Observatory).

Based on data provided by Goldmedia data, these 4 services providers accounted for 88% of viewing time in the same 9 countries ('SVOD Usage in Europe – 2024 edition', European Audiovisual Observatory) .

- Data on cinema admissions were extracted from the Observatory's LUMIERE database. EU27 data does not include Malta.
- The catalogues data were extracted from Justwatch.

▪ Indicators

- SVOD consumption is measured in viewing time.
- Cinema consumption is measured in admissions.
- Catalogue share is measured in number of titles.

▪ Film

- A film is defined as a feature film, fiction film, documentary or other film content available in the 'Film' section of the VOD catalogues.

▪ Original

- Original films exclude content labelled as 'acquisition' or 'exclusive' and films released in cinemas.

▪ Origin of works

- 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) split into
 - EU national
 - EU non-national
 - Other international (all other countries)

Please quote this report as '*The impact of cinema admissions on SVOD usage*', European Audiovisual Observatory.

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- The analysis is based on a limited selection of works because the consumption data only covers a limited number of works..

Number of titles included in SVOD viewing time data
Jan. 2020– Sept. 2024, by country

Country	Films
DE	17 236
DK	8 381
ES	15 455
FI	7 674
FR	13 182
IT	15 412
NL	10 853
PL	10 834
SE	9 761
Grand Total	108 788
<i>Source: OBS based on Digital i</i>	

Number of titles included in cinema admission data
Jan. 2020 – Dec. 2024, by country

Country	Films
DE	3 000
DK	988
ES	2 963
FI	1 231
FR	4 268
IT	2 937
NL	2 776
PL	1 804
SE	1 573
Grand Total	21 540
<i>Source: LUMIERE</i>	

- The Digital i sample of households is statistically representative of the households in the given countries. As with all survey-based samples, there may be small discrepancies.
- In the Digital i sample, there may be small errors in the identification of a work. We estimate these errors account for approximately 1% of the works (1% of the total have no country of production identified).
- Data extracted from LUMIERE was missing for Malta regarding film releases and admissions in the EU27.

Main findings

Main findings

❑ EU27 TITLES REPRESENT A BIGGER SHARE OF THE OFFER IN CINEMAS COMPARED TO SVOD

- In terms of offerings, **EU films had a larger presence in cinemas than on streaming platforms**. They accounted for nearly half of the films available in cinemas, but less than a quarter on streaming platforms. In countries with lower production, such as the Nordic countries and the Netherlands, the share of EU non-national films did not fully compensate for the relative lack of national films. Thus, the overall share of EU films remained lower in these countries than in countries with high production.

❑ FILMS RELEASED IN CINEMAS PERFORM BETTER COMPARED TO THEIR SHARE OF THE SVOD CATALOGUES

- Regardless of their origin, **released cinema titles outperformed their share of the catalogues**. They accounted for almost two-thirds of viewing time, despite making up slightly less than half of the catalogues. Cinema releases in the Nordic countries outperform the most their share of the catalogues in terms of viewing time.
- **The situation was quite different when it came to EU27 films**. They accounted for almost the same proportion of viewing time than their proportion of titles in the catalogues. However, in five countries, the share of viewing time was lower than the share in the catalogues.

❑ ORIGINAL FILMS PERFORM BETTER COMPARED TO OTHER FILMS

- **Original films commissioned by the streamers outperformed their proportion of measured titles in terms of viewing time**. Although they represented only 6% of the measured titles in the SVOD sample, they accounted for nearly a quarter of the viewing time. EU27 original titles performed even better: accounting for 23% of viewing time despite representing only 3% of measured titles.

Main findings

❑ THE WIDER A FILM IS RELEASED IN CINEMAS, THE MORE VIEWING TIME IT IS LIKELY TO GET

- **There appears to be a correlation between the number of markets in which a film is released and its viewing time on SVOD.** The more markets in which a film is released, the longer it is viewed on SVOD. In 2024, films released in all analysed EU27 countries had an average viewing time that was 11.5 times higher than those released in just one market. The difference is smaller for films from the EU27.

❑ NATIONAL TITLES HAVE A BIGGER SHARE OF CONSUMPTION IN CINEMA COMPARED TO SVOD AS OPPOSED TO EU NON-NATIONAL TITLES

- **The cinema market relies more heavily on national admissions than the SVOD market.** Although more than a quarter of admissions are generated by national titles, they account for only 10% of viewing time. However, the proportion of national admissions has decreased from 39% to 28% between 2020 and 2024, returning to its pre-pandemic levels. Meanwhile, the proportion of national SVOD viewing time has remained stable.
- The conclusion is different when it comes to EU non-national films. They account for a larger proportion of viewing time (11%) than admissions (5%).

❑ THE MORE A FILM HAS CINEMA ADMISSIONS, THE MORE VIEWING TIME IT IS LIKELY TO GET

- **There appears to be a correlation between the number of cinema admissions and viewing time.** On average, films with the highest number of admissions received eleven times more viewing time than those with the lowest. This is due to the popularity of US blockbusters on SVOD platforms.

Main findings

□ THE TOP FILMS IN TERMS OF ADMISSIONS ARE USUALLY AVAILABLE ON SVOD BUT RARELY APPEAR IN THE MOST VIEWED TITLES ON SVOD

- When considered individually, regardless of their origin, **most of the top 100 films in terms of admissions between 2019 and 2023 were available on streaming platforms**, with 96% accessible online. However, **few of them enjoyed comparable success**. Only 12 appeared in the top 100 by viewing time, and all of these were US films. When considering only EU27 titles, a lower proportion of films are present on SVOD (81%), but almost as many of these appear in the top 100 by viewing time (10%).
- At country level, the number of national films in the top 100 by admissions that were available on streaming platforms dropped significantly. Of the countries compared, Spain has the highest proportion of national films from the top 100 by admissions available on SVOD, at 66%. By contrast, only two national titles from the top 100 are available on SVOD in Finland.
- The number of top 100 non-EU national films available on SVOD decreased further compared to EU national films, ranging from 30 in Germany to four in Denmark.

Part I

Cinema releases, SVOD offer and performance

I. A. How do national releases in cinema compare to national share in catalogues on SVOD?

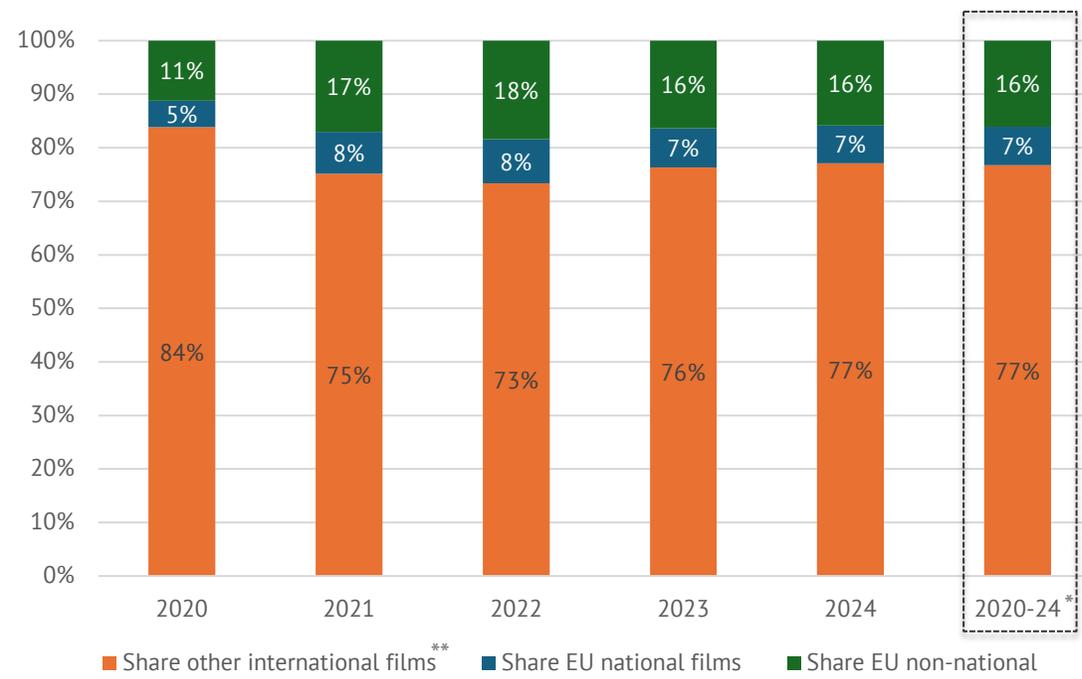
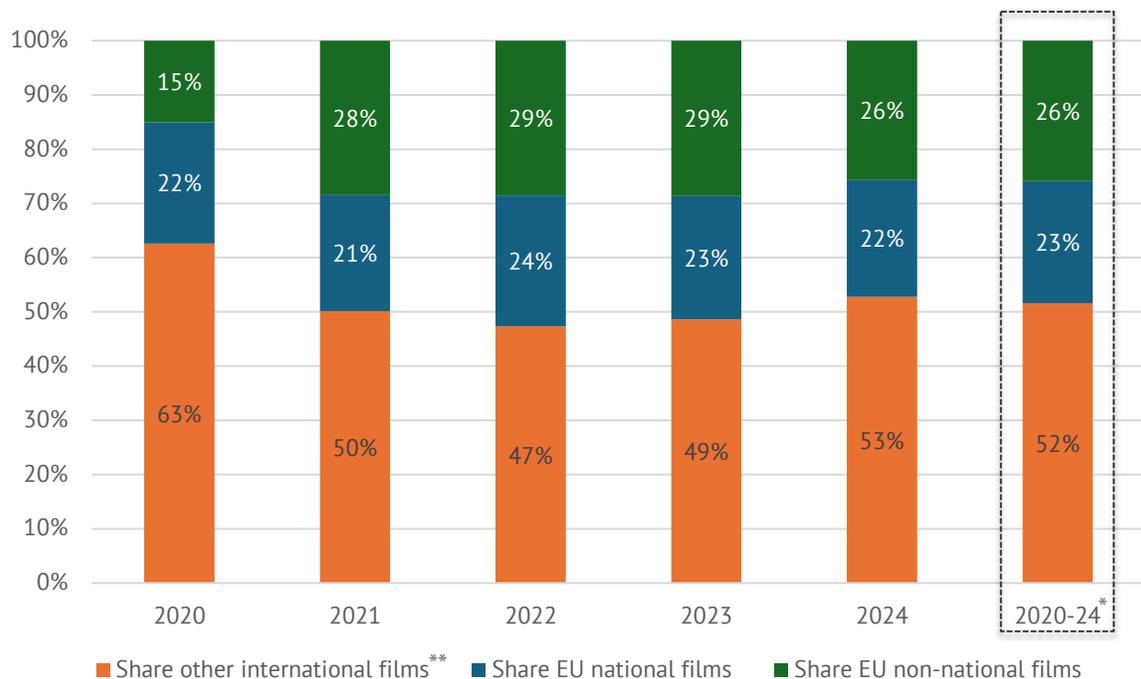
- In this section, we compare the share of domestic films available in cinemas and SVOD in the 9 countries of the sample.
- In the case of SVOD, only films produced from 1996 were taken into account.
- Only films with at least 1 000 admissions in EU9 were taken into account.

Sample

Cinema releases EU9: 2020-2024
SVOD catalogues EU9: snapshot each year from 2020-2024

EU nationals and EU non-nationals represented a larger proportion of titles in cinemas than in SVOD catalogues

- Over the period, the share of other international films in cinemas and SVOD catalogues decreased, while the share of non-national EU films increased significantly.
- EU non-national films were more frequently available in cinemas and SVOD catalogues than EU national films.



Share of film releases in cinema by origin
In percentage of total releases

Share of films in SVOD catalogues by origin
In percentage of the catalogues

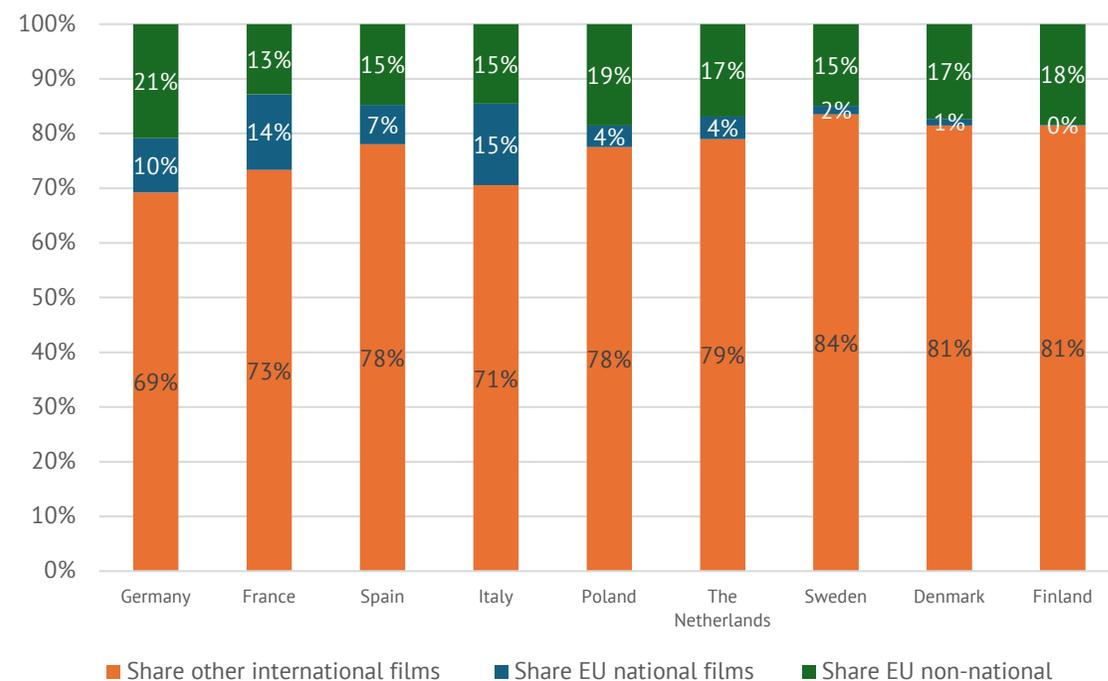
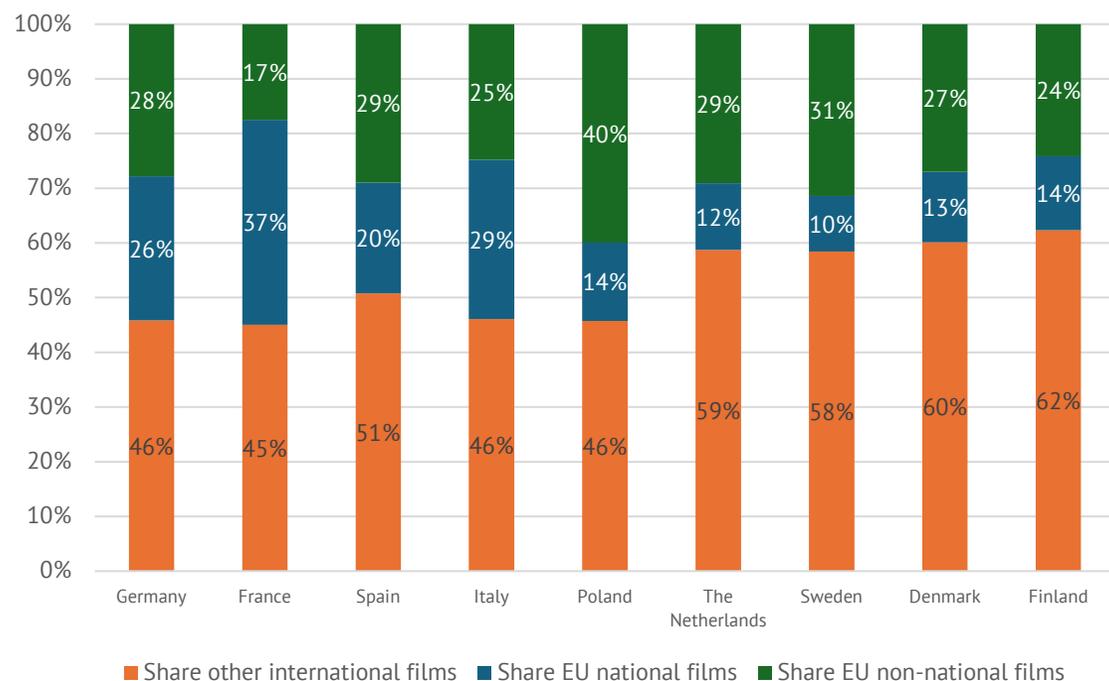
*21 540 releases in cinemas and 52 462 films counted on SVOD catalogues over the period.

**The US accounted for 27% of releases and 39% of all SVOD films.

Source: OBS based on Digital i data and LUMIERE

EU nationals and EU non-nationals represented a larger proportion of titles in cinema than in SVOD catalogues in all countries

- Of all the countries, only France and Italy had a proportion of national films available that equalled or exceeded the proportion of non-national films available in cinemas and on SVOD.
- The Nordic countries and the Netherlands had the highest proportion of other international films available in cinemas and on SVOD.



Share of film cinema releases by origin, per country
In percentage of total releases

Share of films in SVOD catalogues by origin, per country
In percentage of the catalogues

Source: OBS based on Digital i data and LUMIERE

I.B.1 Do films released in cinemas outperform compared to their share of catalogues?

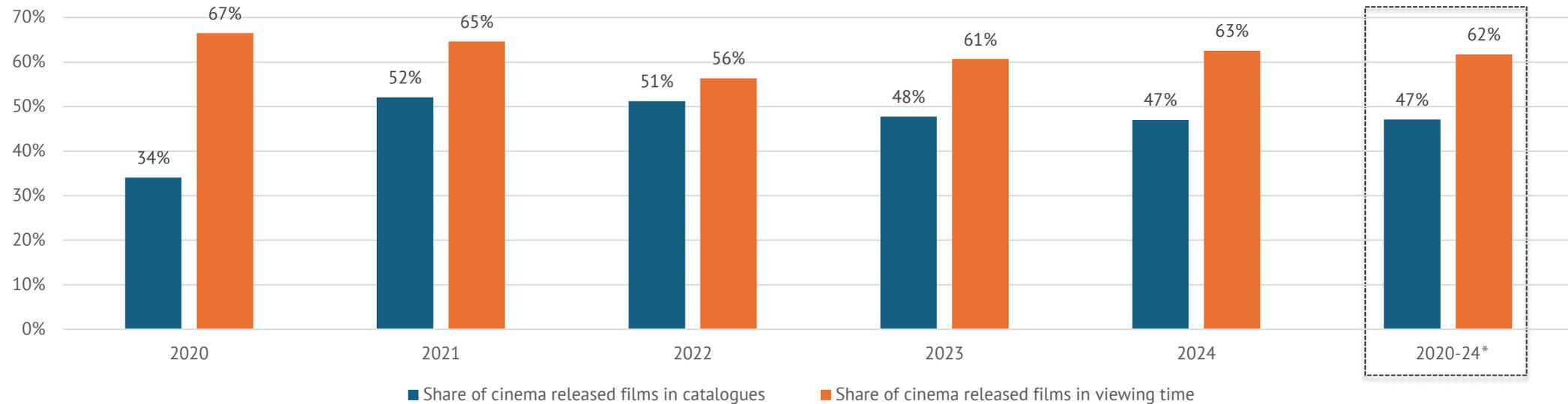
- Only films produced and released from 1996 were taken into account.
- Only films with at least 1 000 admissions in EU27* were counted as cinema releases.

Sample

Cinema releases EU27*: 1996-2024
SVOD viewing time: January 2020 - September 2024

Films released in cinemas represented half of the SVOD catalogues but 2/3 of the viewing time

- The leap of cinema released films in the catalogues in 2021 came from the Prime catalogue in the following countries: Spain, France and the Netherlands.
- The share of cinema released films in the catalogues increased from 2020 to 2024 but decreased in viewing time.



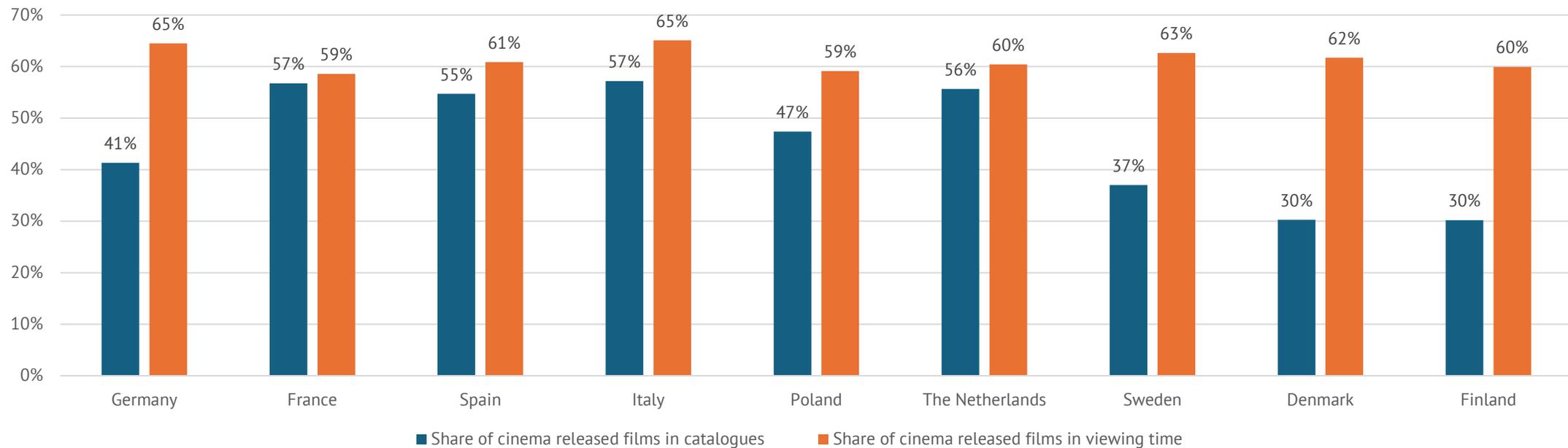
Share of cinema released films in catalogues vs share of cinema released films in viewing time
In percentage of viewing time and catalogues, films released in 1996 or later, all origins

**27.3 millions hours of viewing time out of 44.2 millions were generated by cinema released films.
EU27 titles released in cinemas accounted for 6 millions hour of viewing time.*

Source: OBS based on Digital i data

Films released in cinemas overperformed their share in the catalogues in all countries

- The highest share of films released in cinemas in SVOD catalogues was found in France and Italy.
- Germany and Italy had the highest viewing time for cinema releases.
- Compared to their share in catalogues, films released in cinemas in France overperformed the least.
- Denmark was the country where films released in cinemas performed the best in relation to their catalogue share.



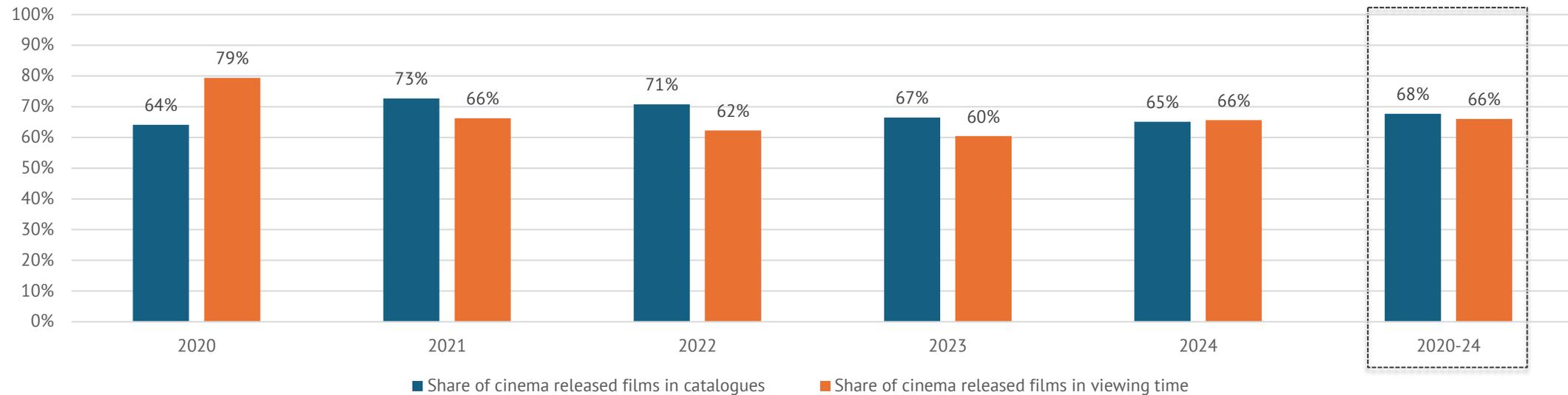
Source: OBS based on Digital i data

Share of cinema released films in catalogues vs share of cinema released in viewing time, per country
In percentage of viewing time and catalogues, films released in 1996 or later, all origins

Source: OBS based on Digital i data

EU27 films released in cinemas had almost an equal share in catalogues and viewing time

- Films produced in the EU27 accounted for two-thirds of the catalogue and almost the same proportion of viewing time of EU27 works.
- The share of viewing time for films released in cinemas decreased over the period.

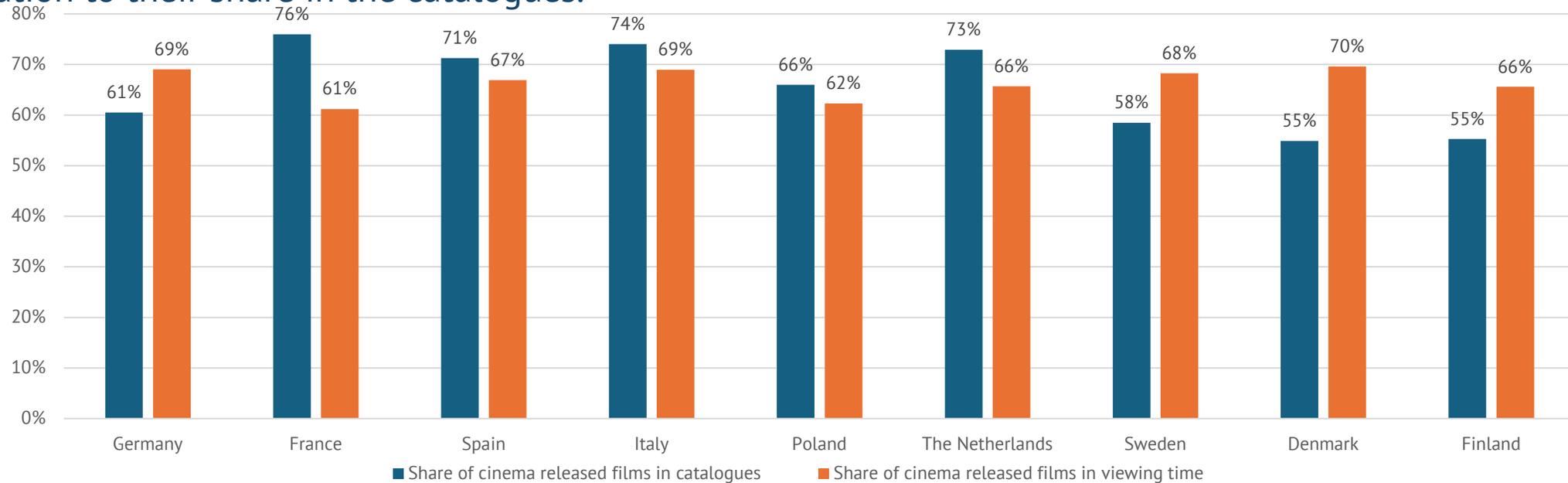


Share of cinema released films in catalogues vs share of cinema released films in viewing time
In percentage of viewing time and catalogues, films released in 1996 or later, EU27 films

Source: OBS based on Digital i data

In most countries, EU27 films released in cinemas underperformed their share of the catalogues

- France and Italy had the highest share of EU27 films released in cinemas.
- Denmark had the highest viewing time for cinema releases.
- France was the country in which films released in cinemas underperformed the most in terms of their catalogues share (-15 p.p).
- Germany, Sweden, Denmark and Finland were the countries where films released in cinemas overperformed in relation to their share in the catalogues.



Share of cinema released films in catalogues vs share of cinema released in viewing time, per country
In percentage of viewing time and catalogues, films released in 1996 or later, EU27 films

Source: OBS based on Digital i data

I.B.2 How do films that were released in cinemas perform on SVOD compared to films that were not?

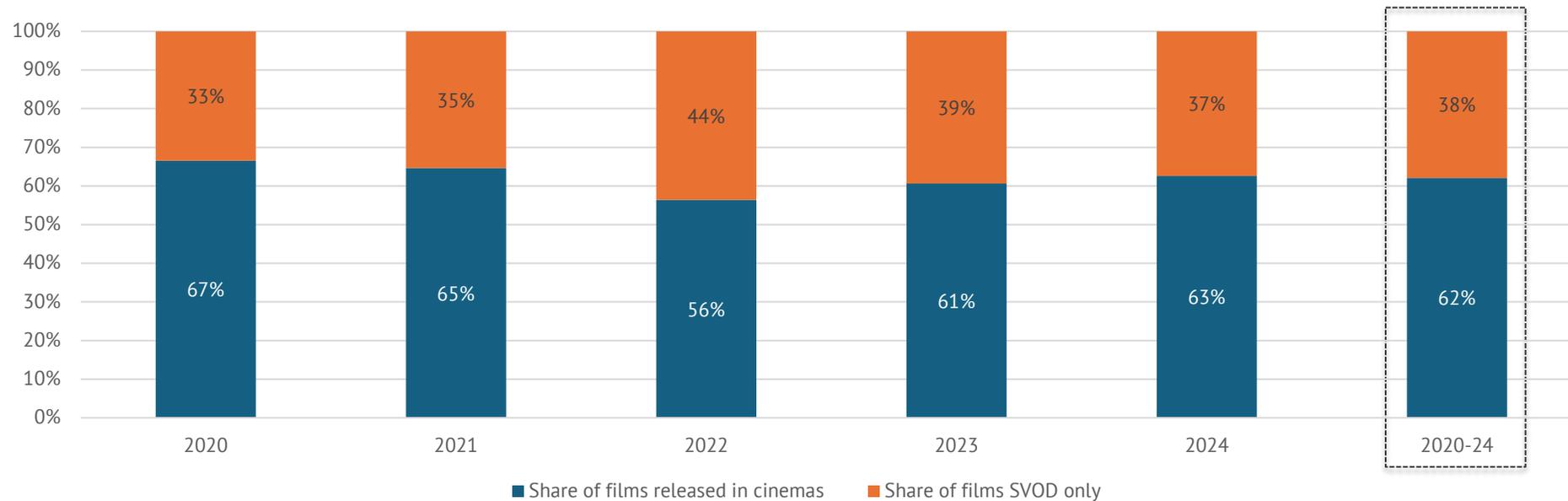
- Only films produced and released from 1996 were taken into account.
- Only films with at least 1000 admissions in EU27* were counted as cinema release.

Sample

Cinema admissions EU27*: 1996-2024
SVOD viewing time: January 2020 - September 2024

Films released in cinemas accounted for two-thirds of viewing time

- Throughout the period, films released in cinemas accounted for the majority of viewing time, but their share of viewing time has decreased.

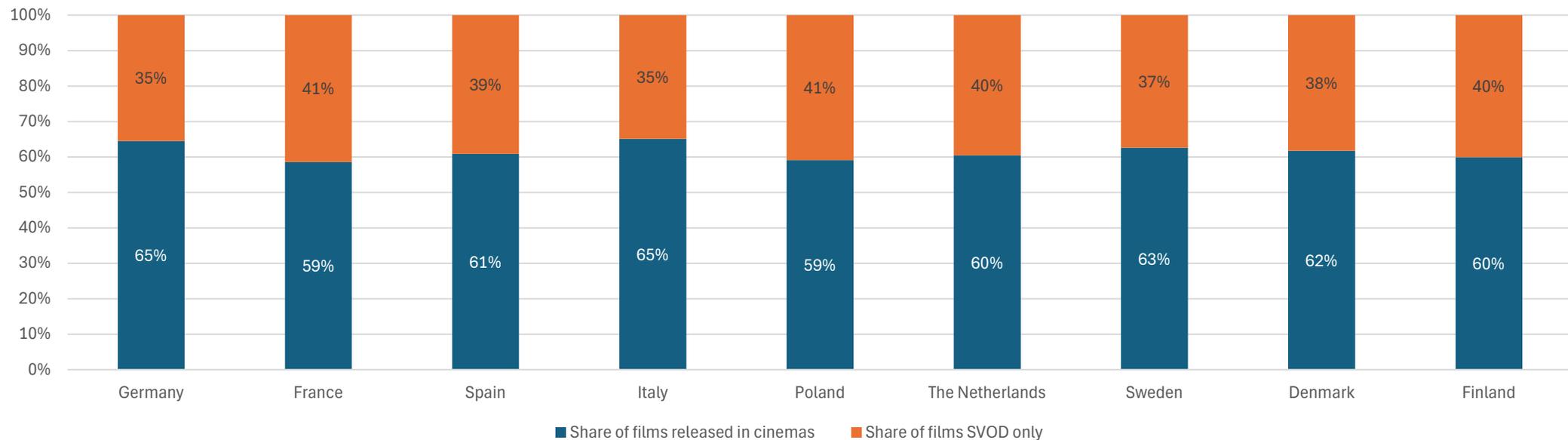


Share of films released in cinemas vs SVOD only
In percentage of viewing time, all origins

Source: OBS based on Digital i data

Films released in cinemas received the highest viewing time in all 9 countries

- Germany and Italy were the countries in which films released in cinemas got the highest share of viewing time (65%).
- Poland and France were the countries in which SVOD only films got the highest share of viewing time (41%).

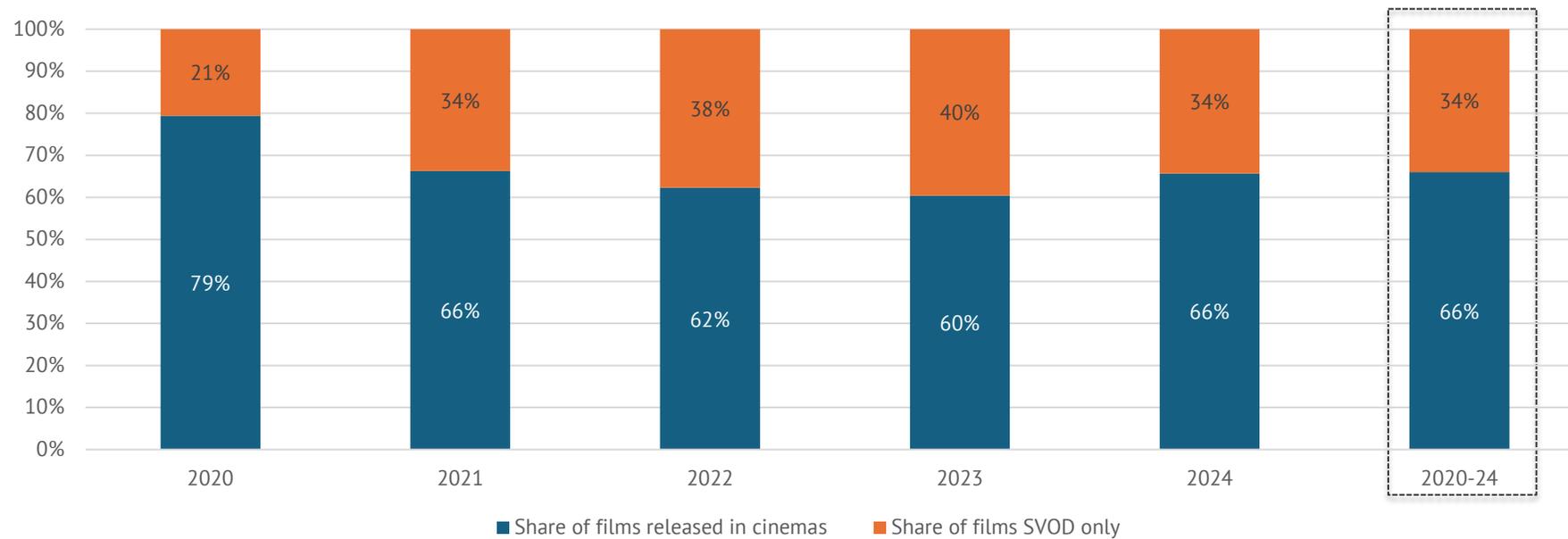


Share of films released in cinemas vs SVOD only, per country
In percentage of viewing time, all origins

Source: OBS based on Digital i data

EU27 films released in cinemas accounted for 2/3 of viewing time of EU27 films

- Throughout the period, films released in cinemas by the EU27 got a slightly bigger share of viewing time than films from all other origins.
- The share of viewing time for EU27 films released in cinemas also decreased over the period.

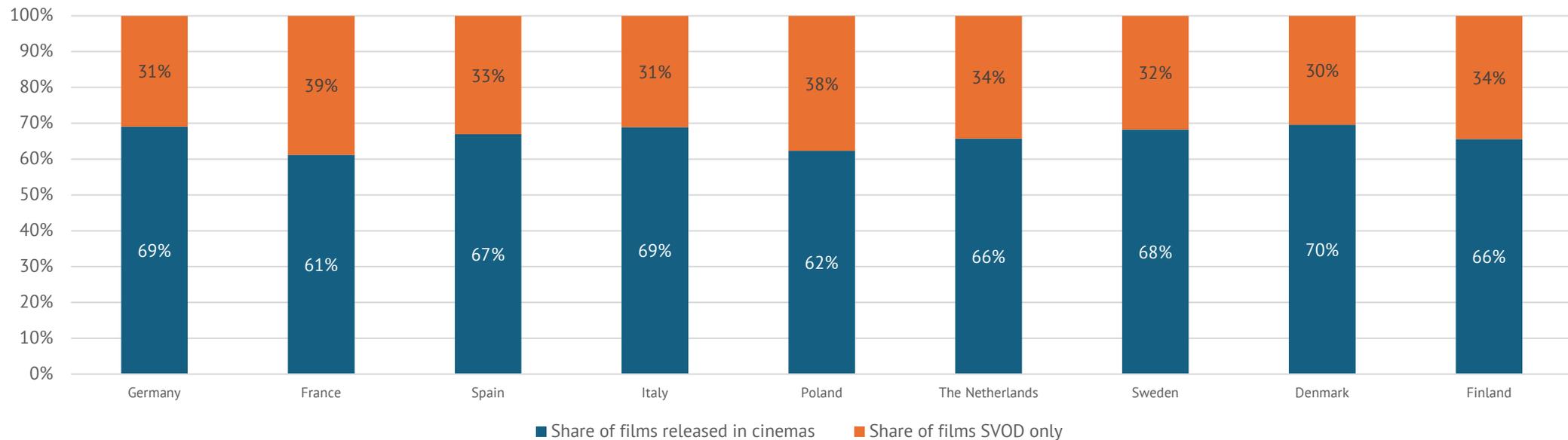


Share of films released in cinemas vs SVOD only
In percentage of viewing time, EU27 films

Source: OBS based on Digital i data

EU27 released films in cinema got the majority of viewing time in all 9 countries

- Germany and Italy are the country in which films released in cinemas received the highest viewing time share (69%).
- France was the country in which SVOD only films got the highest share of viewing time (39%).



Share of films released in cinemas vs SVOD only, per country
In percentage of viewing time, EU27 films

Source: OBS based on Digital i data

I.B.3 How do EU27 originals perform on SVOD?

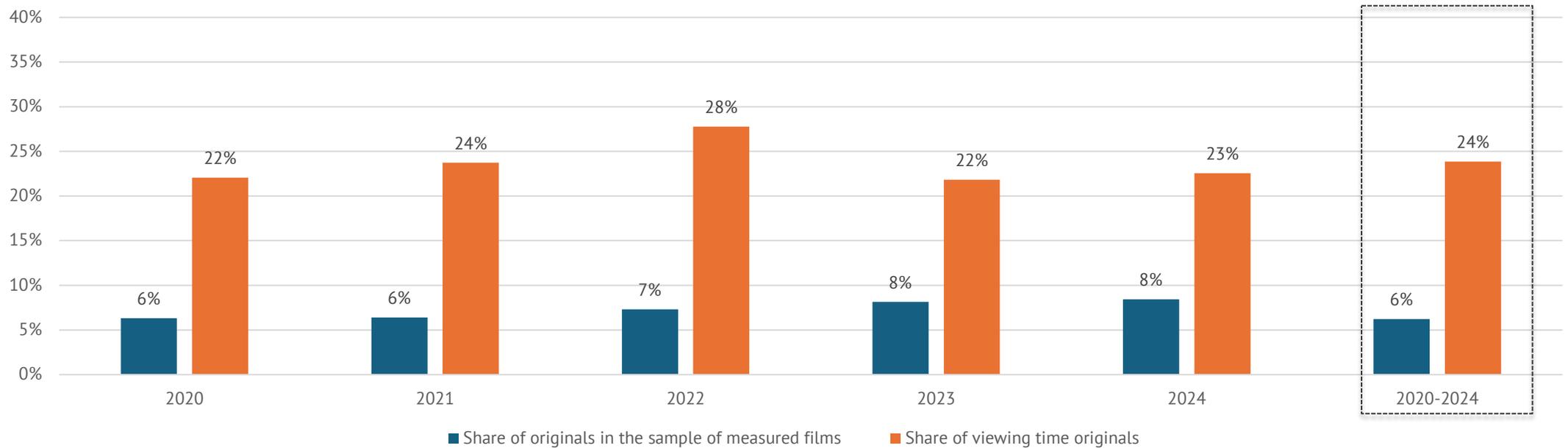
- **Original qualification was not possible for the catalogues, so the analysis is limited to titles in the Digital i sample for which viewing time are available.**

Sample

SVOD viewing time: January 2020 - September 2024

Original titles outperformed their share in catalogues in terms of viewing time throughout the time

- Throughout the period, original works performed better than their share in catalogues in terms of viewing time.
- The performance of original works reached its peak in 2022, while its share in catalogues slowly increased.

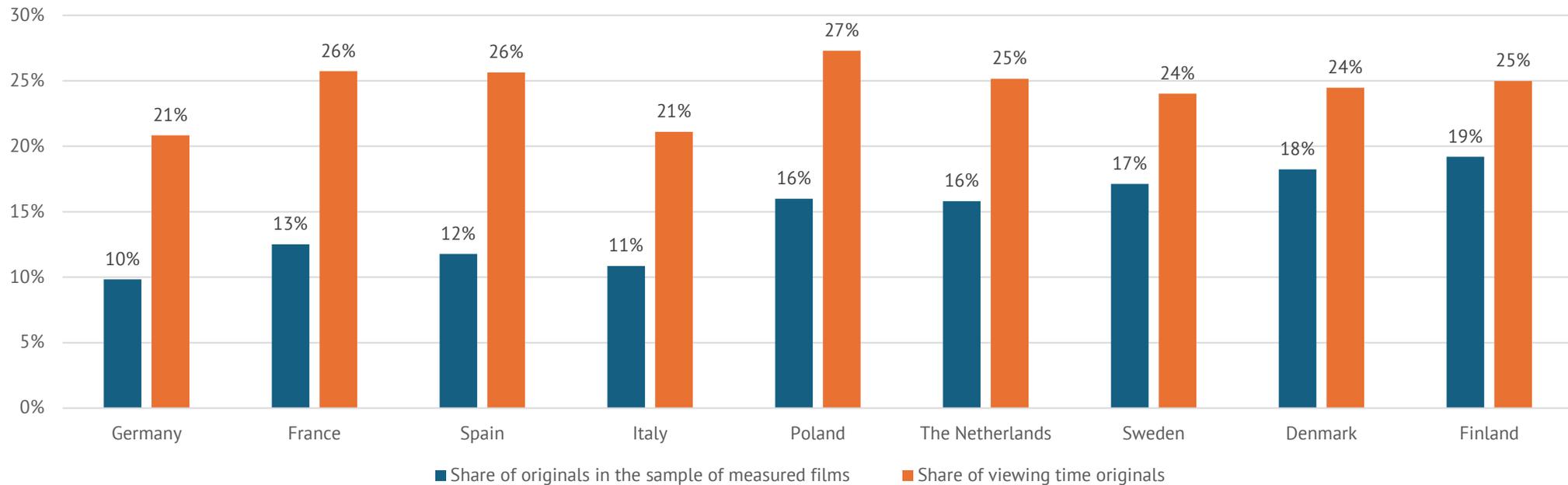


Share of measured originals titles vs share of viewing time originals
In percentage of viewing time and number of titles, all origins

Source: OBS based on Digital i data

Original titles outperformed their share in catalogues in terms of viewing time in all countries

- Compared to their share in catalogues, original works performed better than their shares in catalogues in all the countries of the sample.
- Original works performed better in Spain relative to their share in catalogues than any other countries.
- Original works performed less well in Denmark and Finland relative to their share in catalogues than in other countries.

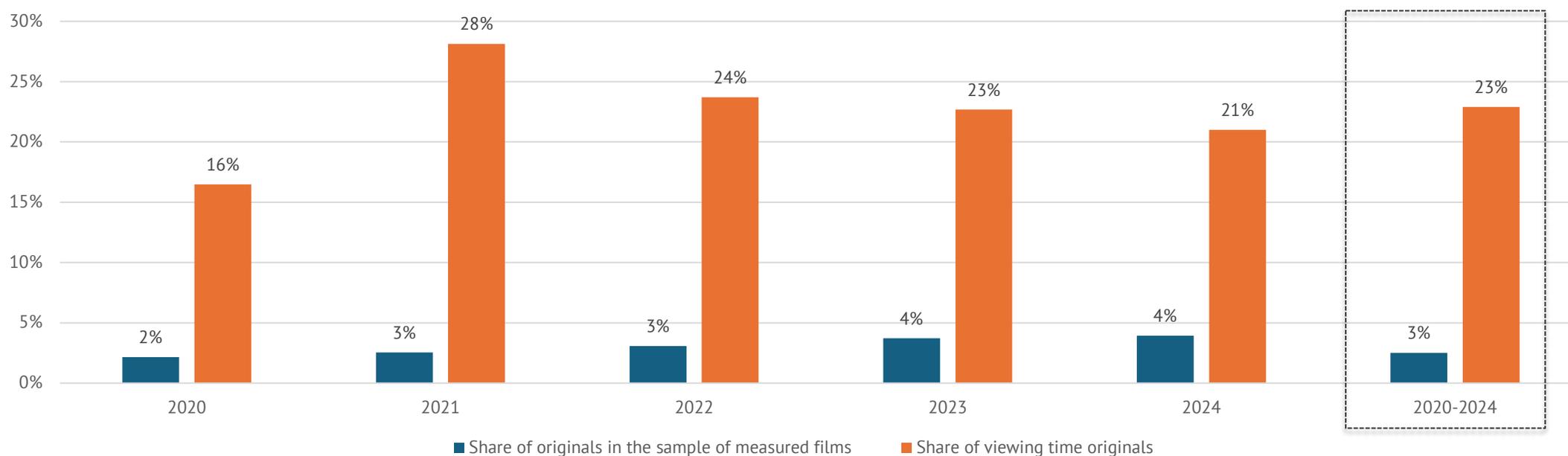


Share of measured originals titles vs share of viewing time originals, per country
In percentage of viewing time and number of titles, all origins

Source: OBS based on Digital i data

EU27 Originals outperformed even more in viewing time their share of catalogues compared to the total catalogues

- Compared to their share of the catalogues, original titles had an even greater viewing time than all origins titles.
- Original works performance reached a peak in 2021 and decreased continuously since then while its share of the catalogues slowly increased.

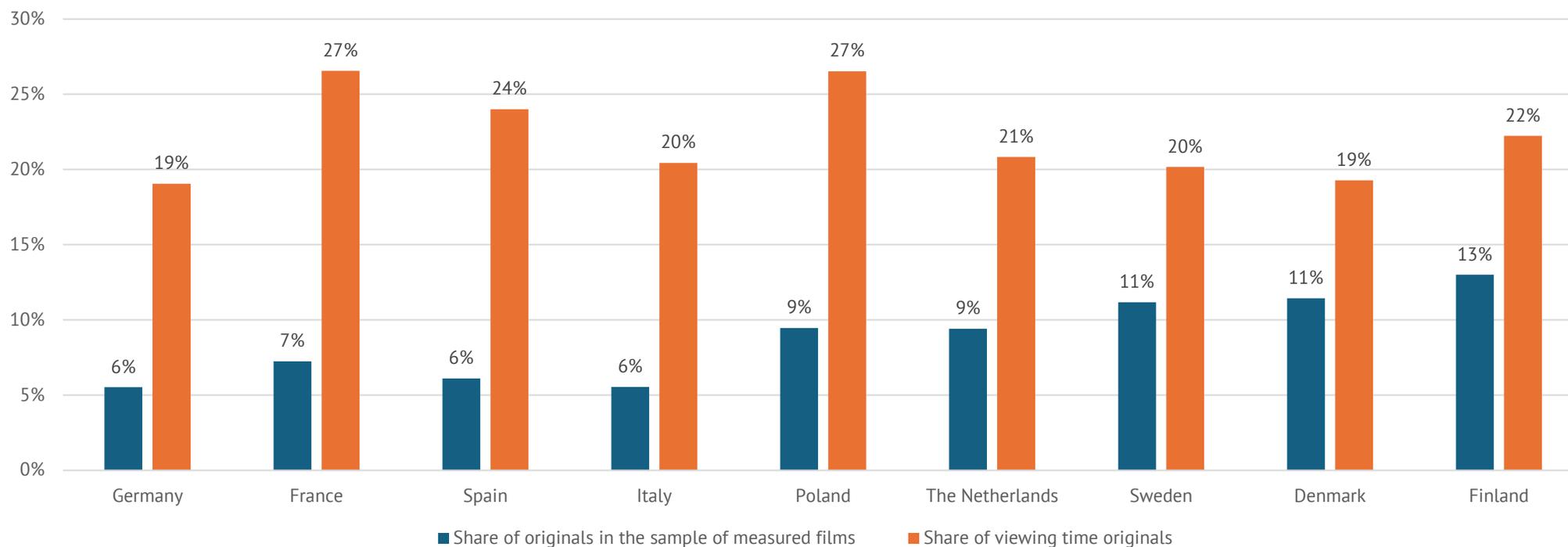


Share of measured originals titles vs share of viewing time originals
In percentage of viewing time and number of titles, EU27

Source: OBS based on Digital i data

EU27 original titles outperformed their share of the catalogues in terms of viewing time even better in all countries

- Original works got the biggest share of viewing time in Poland and France and the smallest in Germany and Denmark.
- Original works performed better in France relative to their share of the catalogues than in other countries.
- Original works performed less well in Denmark relative to their share of the catalogues than in other countries.



Share of measured originals titles vs share of viewing time originals, per country
In percentage of viewing time and number of titles, EU27

Source: OBS based on Digital i data

I.C. Based on the number of released markets, how do films perform on SVOD?

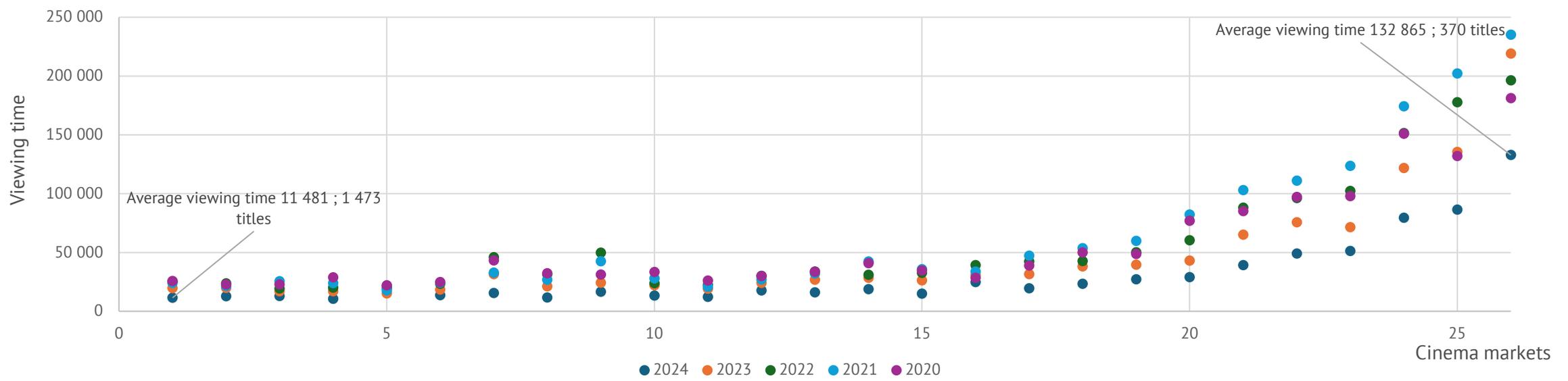
- In this section, we analyse the impact of the number of cinema release markets on SVOD viewing time.
- Only films with at least 1 000 admissions in EU27* were taken into account.

Sample

Cinema release markets EU27*: 1996-2024
SVOD viewing time: January 2020 - September 2024

A film with 26 cinema release markets got more viewing time than a film with 1 cinema release markets

- From 2020 to 2024, films that were released in more cinema markets tended to have higher viewing times.
- This correlation was stronger in 2024 than in 2020. In 2020, titles that were released in 26 markets received an average of seven times more viewing time than titles that were released in only one market. By 2024, this ratio had increased to 11.5.



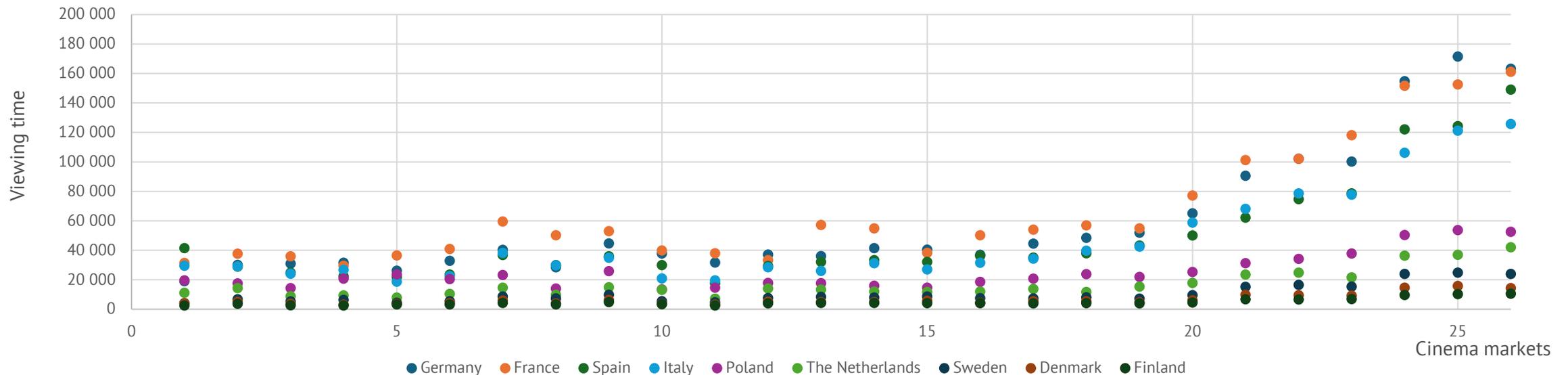
Average viewing time by number of cinema release market
Average viewing time and number of cinema release market, films released in 1996 or later, all origins

Source: OBS based on Digital i data and LUMIERE



Germany was the country in which films with the highest number of release markets got the highest viewing time

- In all countries of the sample, the more cinema release markets a film got, the higher its viewing time is.
- It is in Germany that the gap between films with 1 and 26 release markets was the biggest (x8.6).
- It is in Poland that the gap between films with 1 and 26 release markets was the smallest (x2.7).



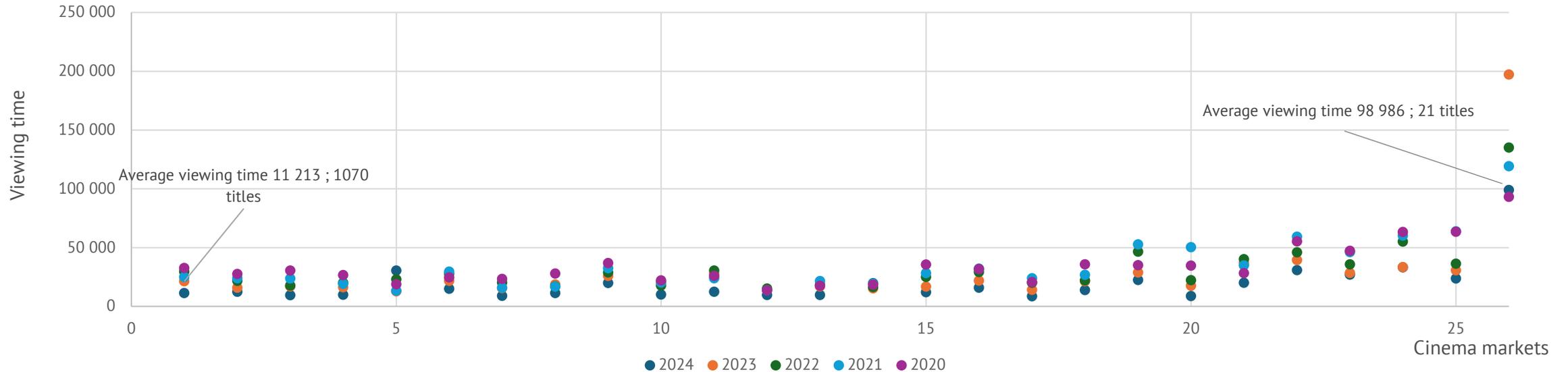
Average viewing time by number of release cinema market, per country

Average viewing time and number of release cinema market, films released in 1996 or later, all origins

Source: OBS based on Digital i data and LUMIERE

The correlation between high number of market releases and viewing time was weaker for EU titles

- The correlation was weaker for EU titles throughout the time.
- The correlation was stronger in 2024 than it was in 2020. In 2020, titles with 26 market releases received an average of 2.8 times more viewing time than titles with only one market release. By 2024, this ratio had increased to 8.8.



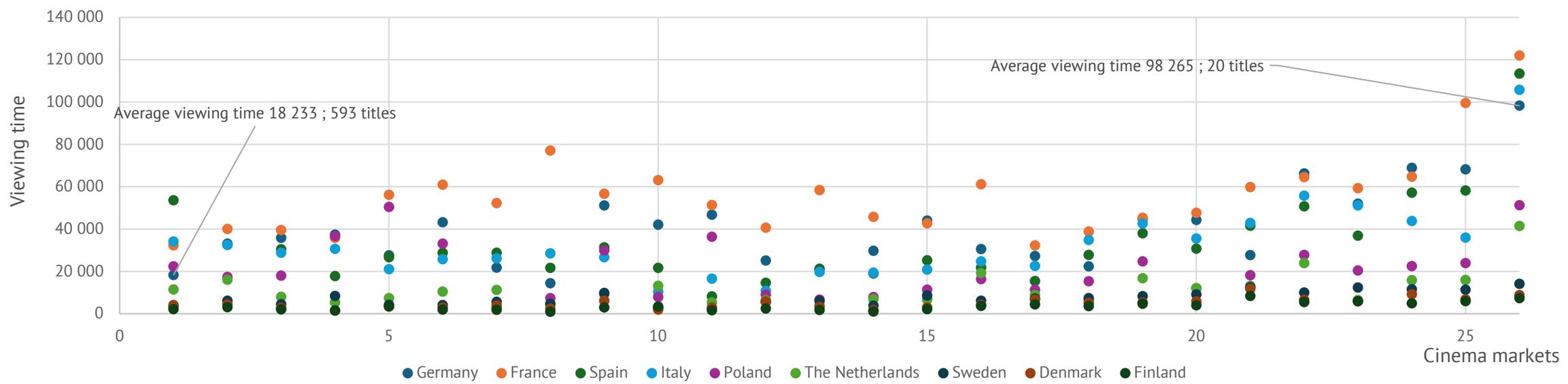
Average viewing time by number of release cinema market

Average viewing time and number of release cinema market, films released in 1996 or later, EU27 titles

Source: OBS based on Digital i data and LUMIERE

The correlation between high number of market releases and viewing time was weaker for EU titles in all countries of the sample

- In all countries in the sample, the correlation between a high number of market releases and higher viewing time was weaker when only EU titles are considered.
- It is in Germany that the gap between films with 1 and 26 release markets was the biggest (x5.4).
- It is in Spain and Denmark that the gap between films with 1 and 26 release markets was the smallest (x2.1).



Average viewing time by number of release cinema market, per country
Average viewing time and number of release cinema market, films released in 1996 or later, EU27 titles

Source: OBS based on Digital i data and LUMIERE



Part II

Cinema admissions and SVOD performance

II.A. How do national admissions compare to national viewing time?

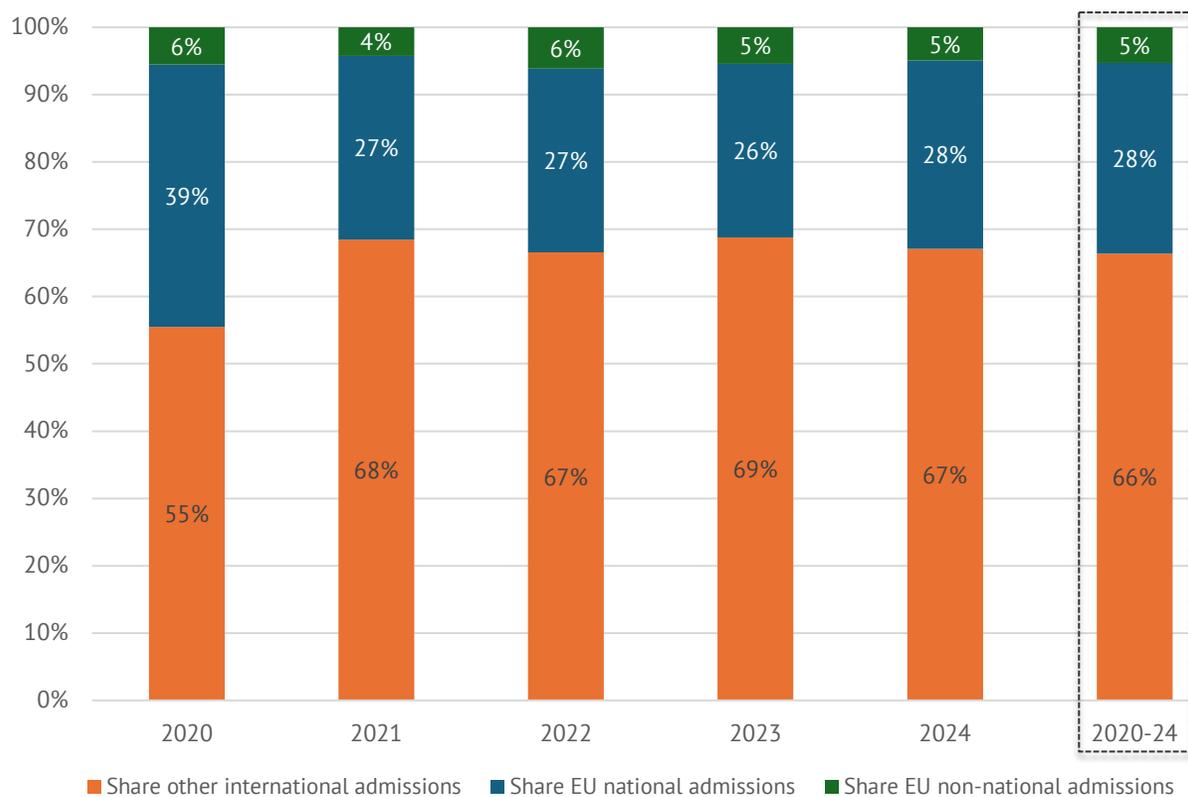
- **In this section, we compare national admissions and national viewing time for films released in cinemas in the nine countries in the sample, and for films viewed on SVOD. In both cases only films produced from 1996 onwards were taken into account.**

Sample

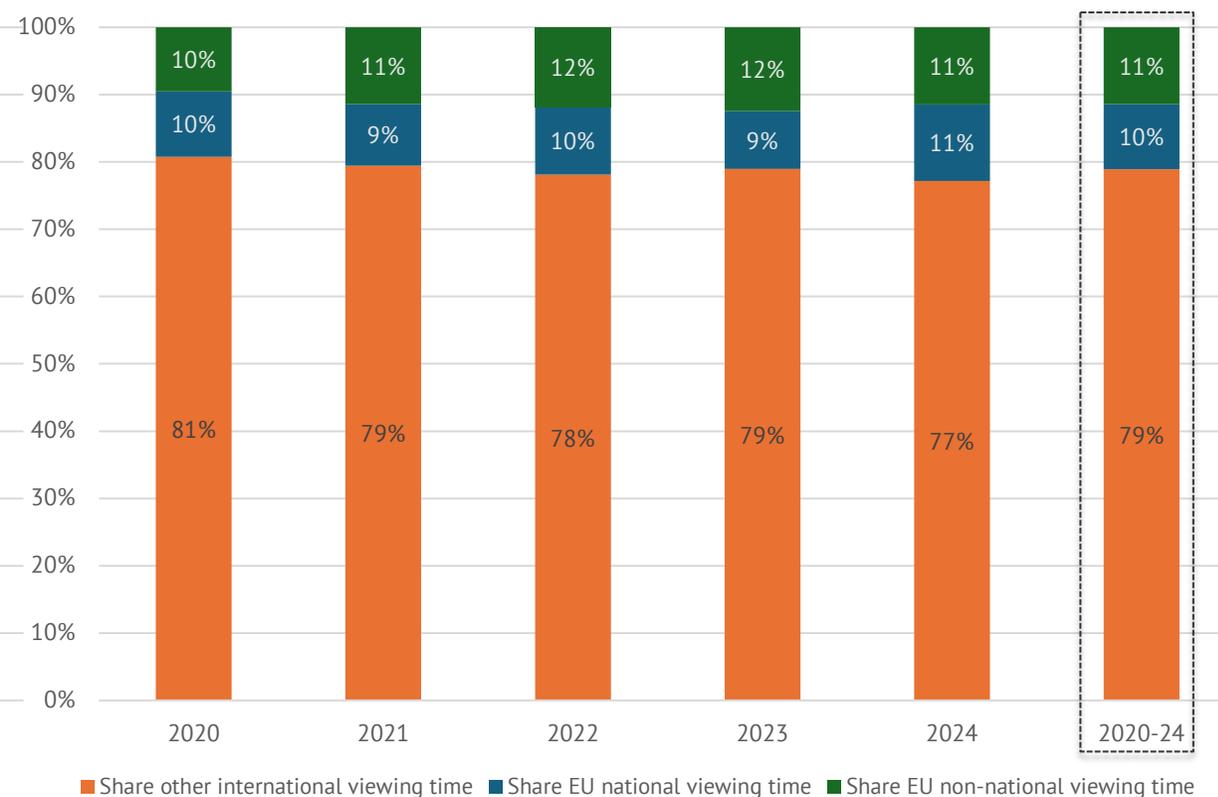
Cinema admissions EU9: 2020-2024
SVOD viewing time: January 2020 - September 2024

The share of national admissions decreased over time while the share of national viewing time remained stable

- The cinema market relied more on national admissions than the SVOD market.
- The share of national admissions decreased over the period from 39% to 28% while the share of national viewing time remained stable.
- EU non-national had a better consumption on SVOD than in cinemas.



Share of national admissions
In percentage of admissions, films released in 1996 or later, all origins

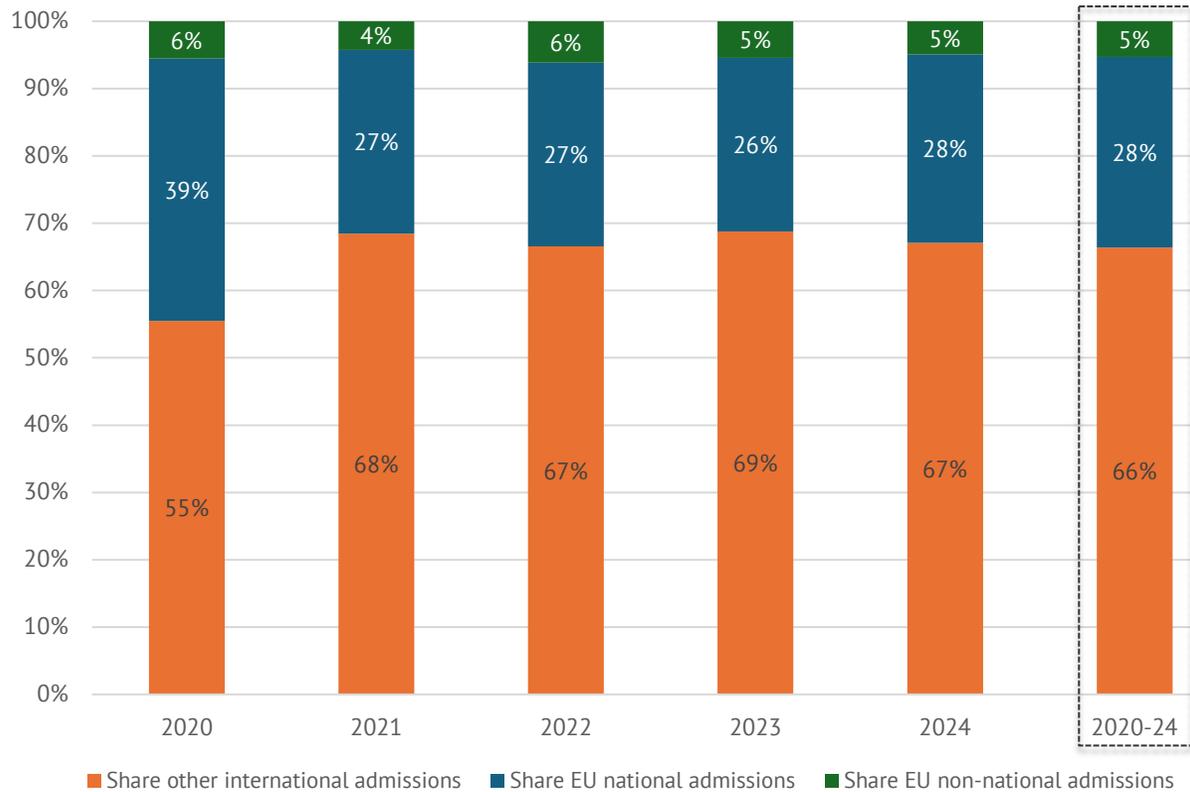


Share of national viewing time
In percentage of viewing time, films released in 1996 or later, all origins

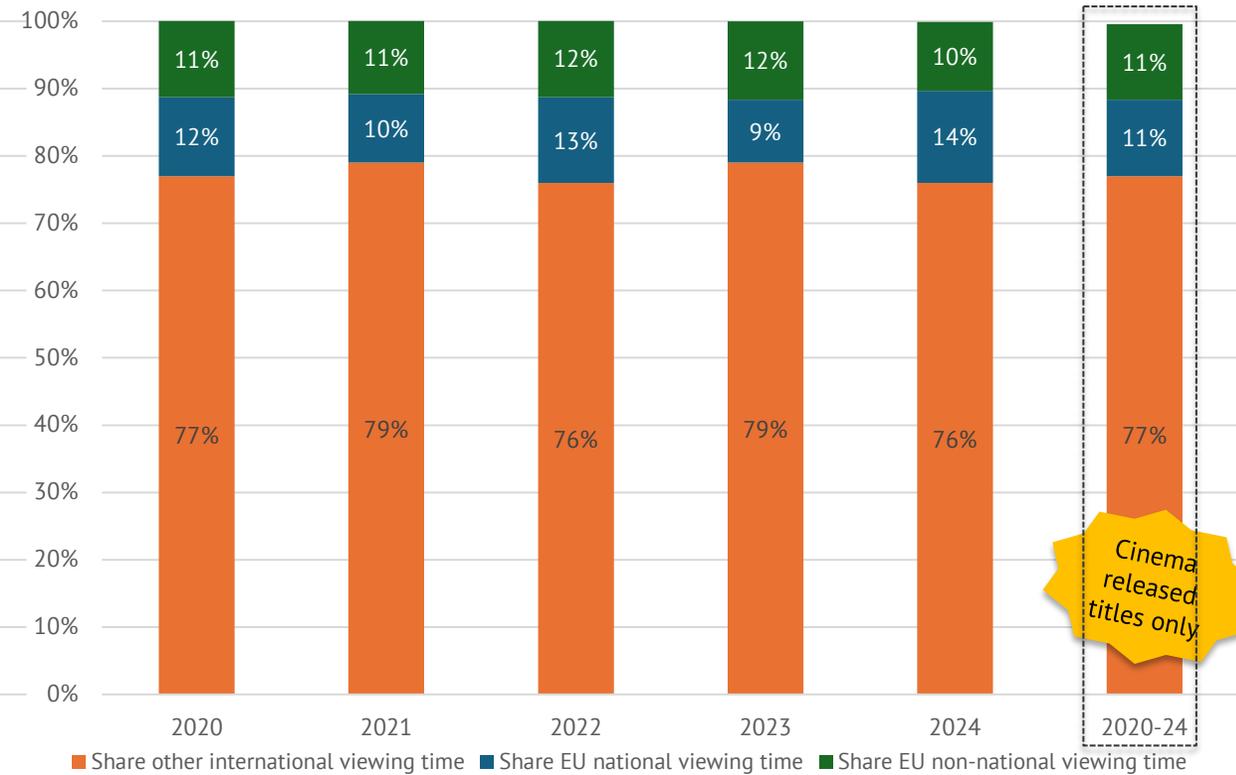
Source: OBS based on Digital i data and LUMIERE

National viewing time was slightly higher for cinemas released titles

- EU national viewing time was slightly higher when only films released in cinemas were counted.



Share of national admissions
In percentage of admissions, films released in 1996 or later, all origins

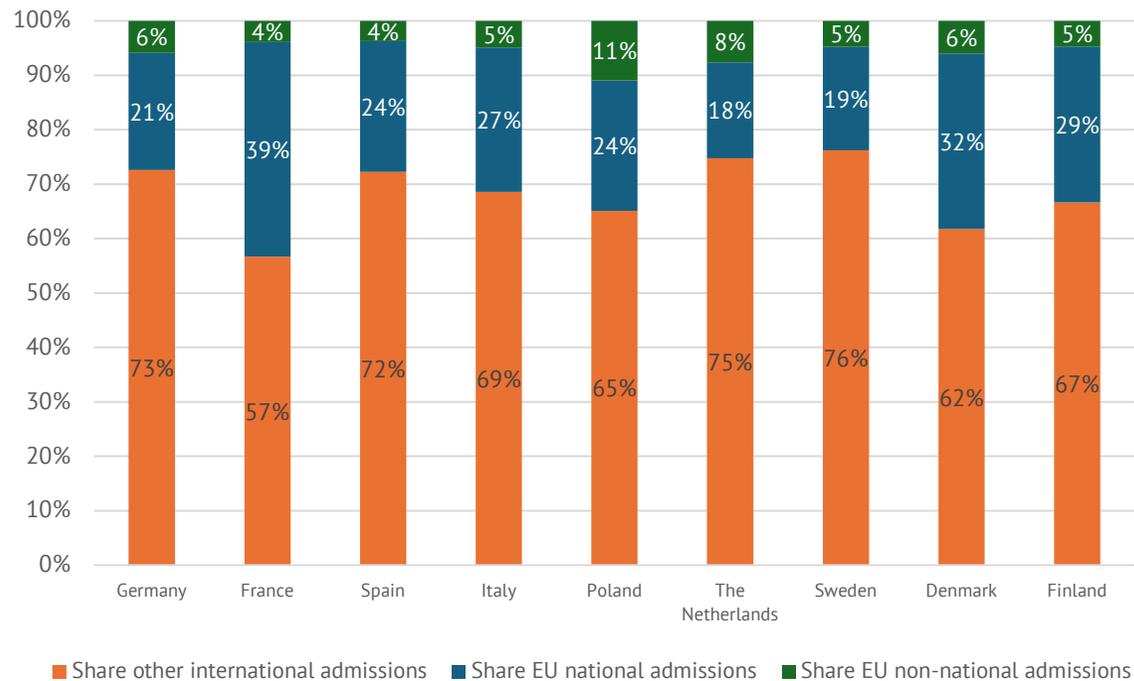


Share of national viewing time
In percentage of viewing time, films released in 1996 or later, all origins, films released in cinemas

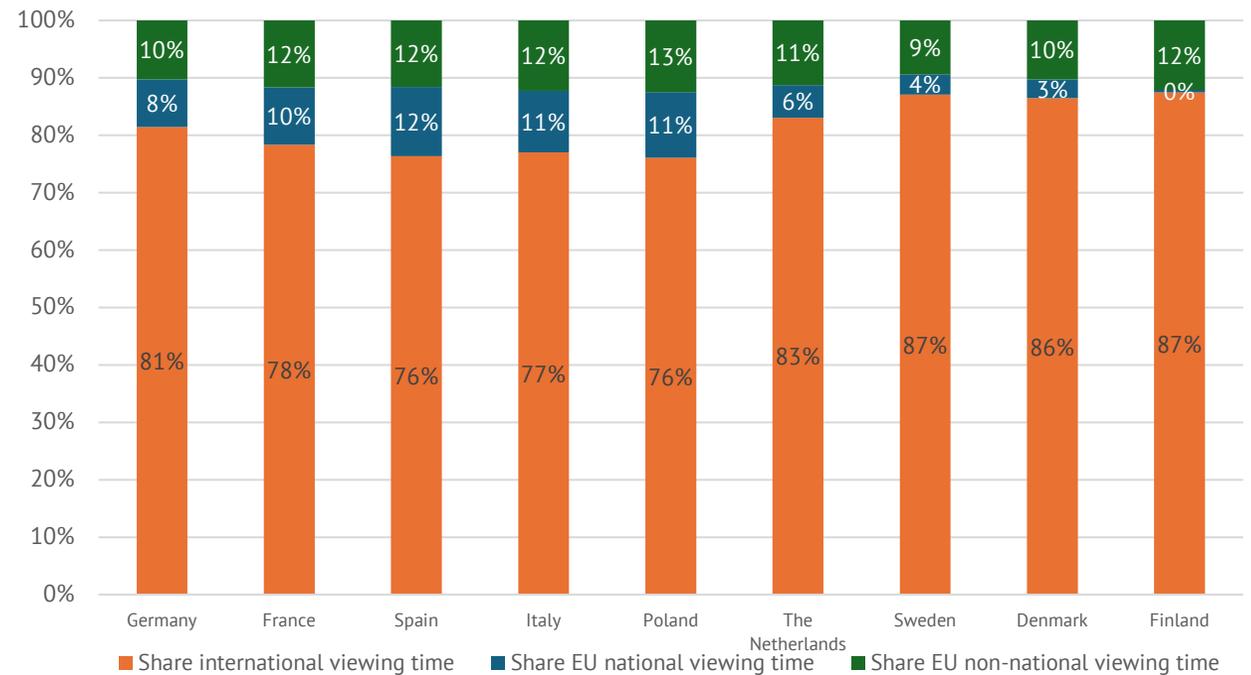
Source: OBS based on Digital i data and LUMIERE

Cinema market relied more on national titles than SVOD in all countries

- In all countries in the sample except Spain, the share of national viewing time was lower than the share of national admissions.
- The share of national admissions was the highest in France (39%) while it was the lowest in the Netherlands (18%).
- The share of national viewing time was the highest in Spain (12%) and the lowest in Finland (0%).



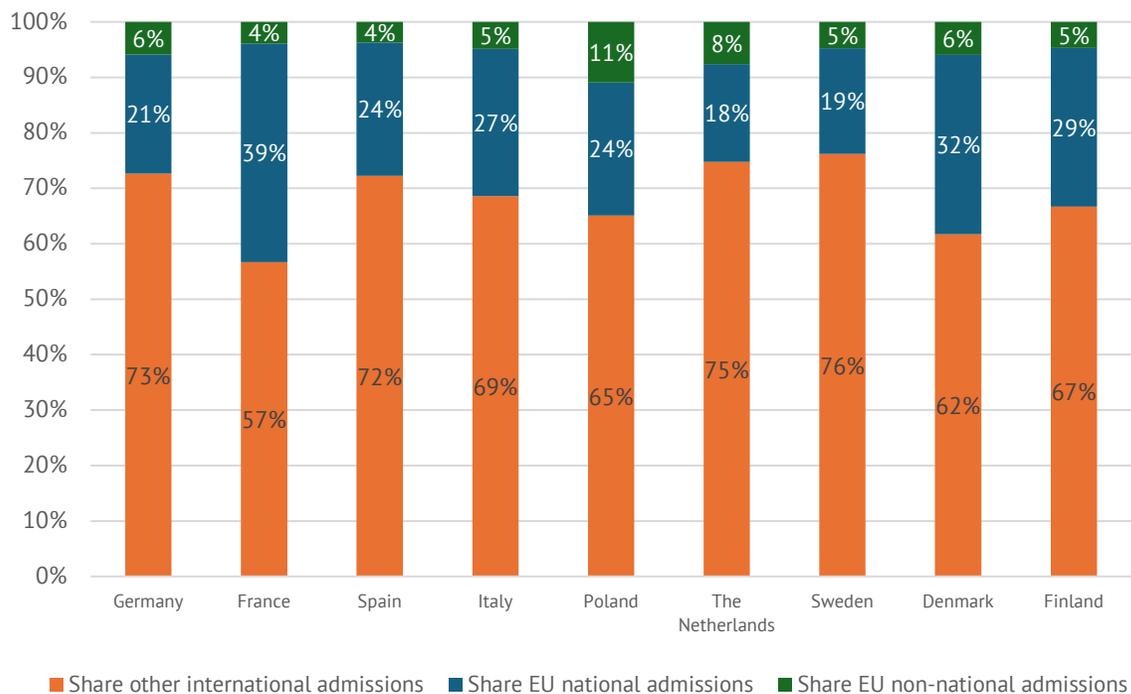
Share of national admissions, per country
In percentage of admissions, films released in 1996 or later, all origins



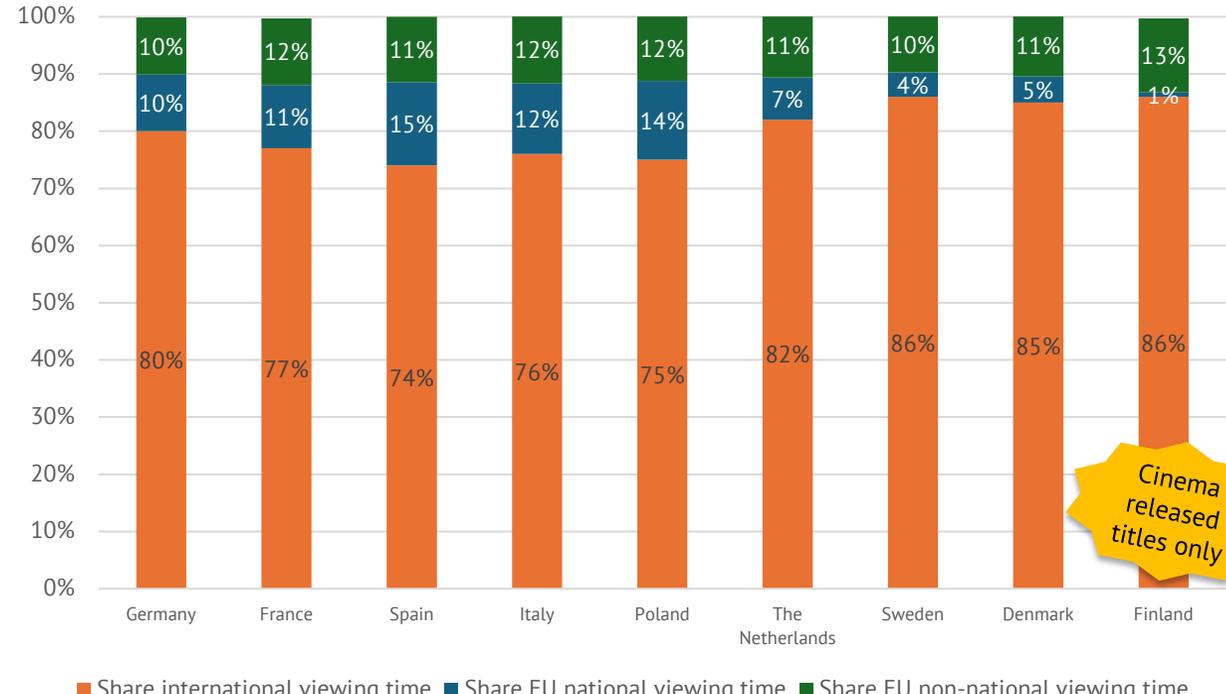
Share of national viewing time, per country
In percentage of viewing time, films released in 1996 or later, all origins

National viewing time was slightly higher for cinemas released titles

- When only films released in cinemas were taken into account, national titles got a higher share of viewing time in all countries except for Sweden.
- The share of national viewing time was the highest in Spain (15%) and the lowest in Finland (1%).
- The share of EU non-national viewing time was the highest in France, Italy and Poland (12%) and the lowest in Germany (10%).



Share of national admissions, per country
In percentage of admissions, films released in 1996 or later, all origins



Share of national viewing time, per country
In percentage of viewing time, films released in 1996 or later, all origins, films released in cinemas

Source: OBS based on Digital i data and LUMIERE

II.B. Based on their admissions, how do films perform on SVOD?

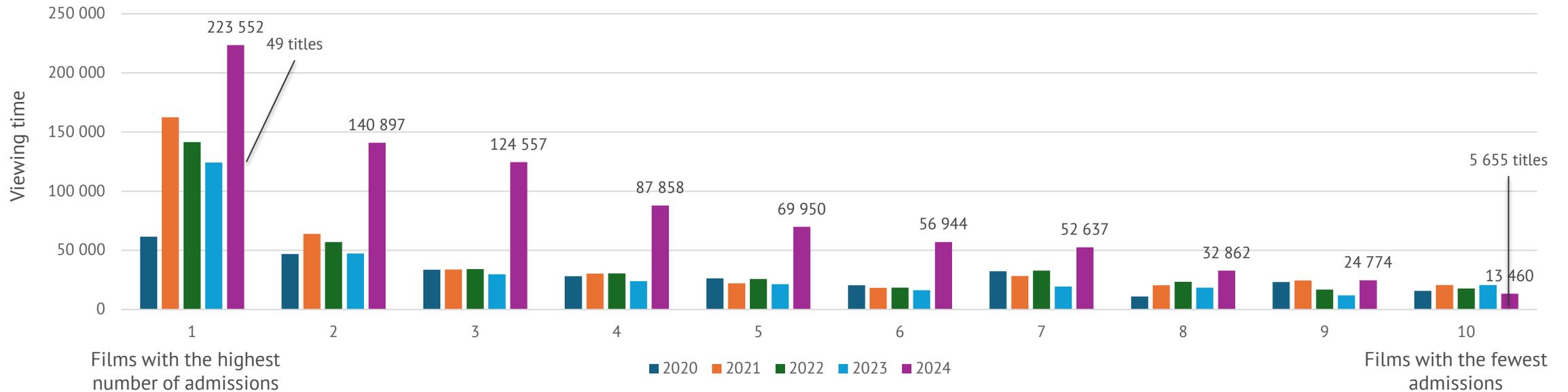
- In this section, we analyse the impact of admissions on SVOD viewing time.
- Theatrical films for which viewing time data is available on SVOD have been divided into deciles based on their admissions. The top 10% of admissions corresponds to the first decile, 10-20% admissions to the 2nd decile...
- Only films with at least 1 000 admissions in EU27* were taken into account.

Sample

Cinema admissions EU27: 1996 - 2024
SVOD viewing time: January 2020 - September 2024

The more admissions in cinemas the more viewing time on SVOD

- From 2020 to 2024, on average, films with the highest number of admissions received more viewing time than those with the lowest number of admissions.
- On average, films from the first decile got 11 times more viewing time than those from the last decile.



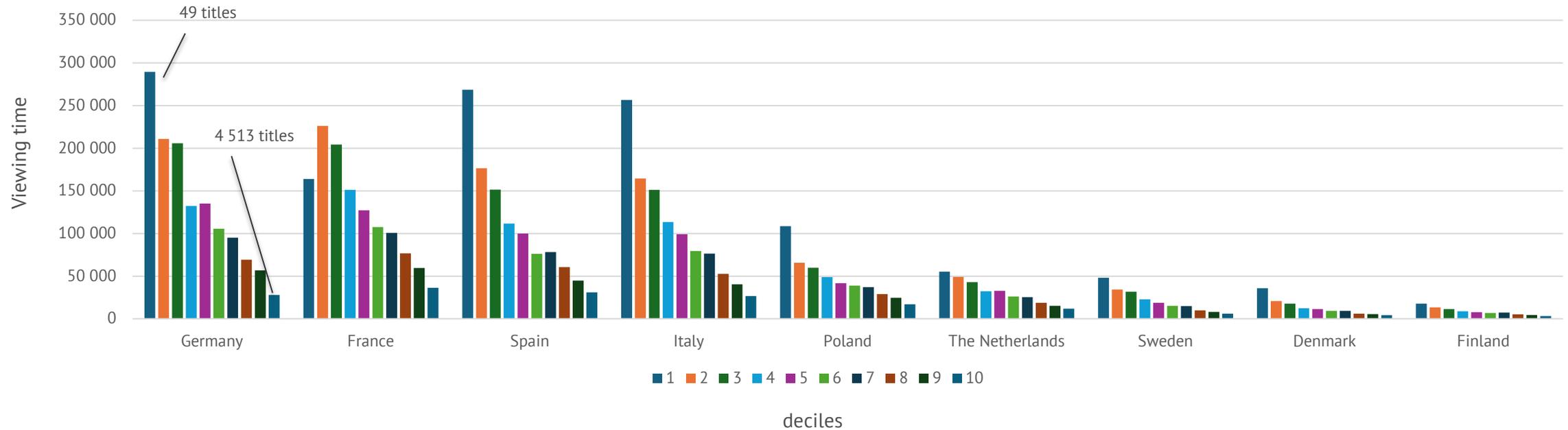
Average viewing time by film admissions

Average viewing time and admissions by decile, films released in 1996 or later, all origins

Source: OBS based on Digital i data and LUMIERE

Germany was the country in which the difference between the first and the last deciles was the greatest

- France was the only country in which the first decile did not have the highest average viewing time.
- It is in Germany that the gap between the first and the last decile was the biggest (x8.6)
- It is in France that the gap between the first and the last decile was the smallest (x4.5).

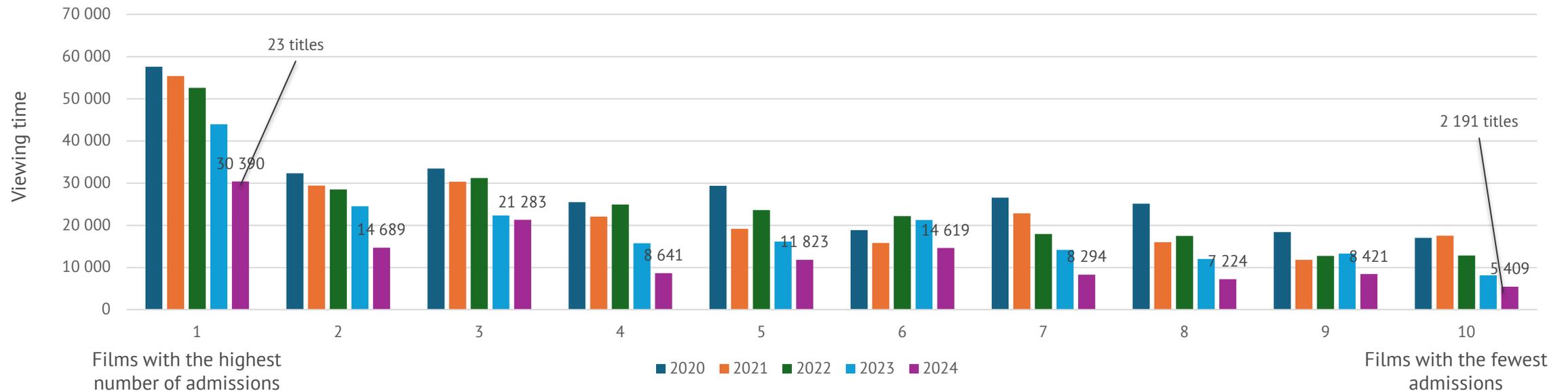


Average viewing time by film admissions, per country

Average viewing time and admissions by decile, films released in 1996 or later, all origins

The correlation between a high number of admissions and viewing time was weaker for EU titles

- The difference between the first and the last decile was smaller for EU titles compared to all origins titles but increased over the time.
- The correlation was stronger in 2024 than in 2020. In 2020, titles from the first decile received an average of 3.4 times more viewing time than titles from the last decile. In 2024, this ratio went up to 7.3.

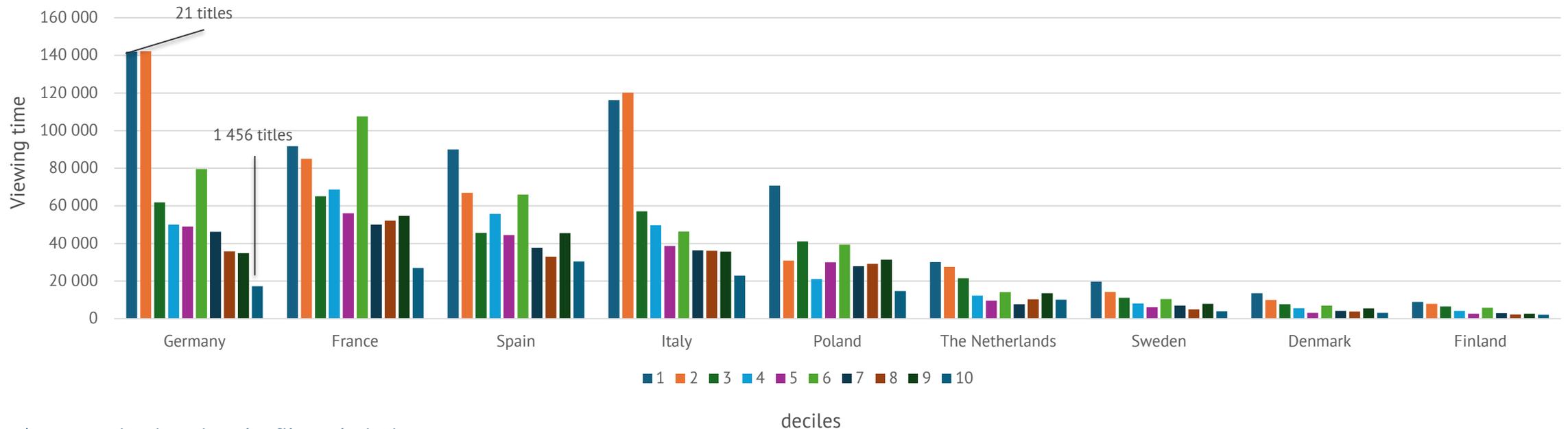


Average viewing time by film admissions

Average viewing time and admissions by decile, films released in 1996 or later, EU27 titles

Germany was the country in which the difference between the first and the last deciles was the greatest

- The relationship between cinema admissions and viewing time was less straightforward for EU27 titles.
- In all countries in the sample, the difference between the first and the last decile was smaller when only EU titles were considered.
- Germany had the biggest gap between films in the first and last deciles (x8.2).
- Conversely, it was in Spain that the gap was the smallest (x2.9).



Average viewing time by film admissions, per country

Average viewing time and admissions by decile, films released in 1996 or later, EU27 titles

II.C. How do the top 100 films in cinemas since 1996 perform on SVOD?

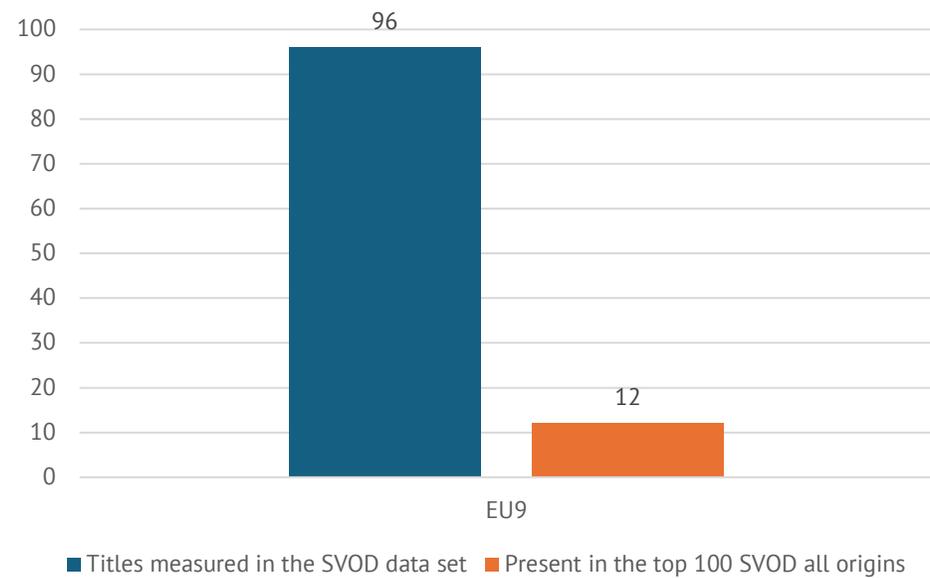
- In this section, we analyse whether the top 100 films by admissions since 2019 are among the most watched films on SVOD in 2024.

Sample

Cinema admissions EU9: 2019 - 2023
SVOD viewing time: January 2024 - September 2024

Although widely available, only 12 titles out of the top 100 theatrical films were in the top 100 most watched films on SVOD

- Almost all of the titles from the top 100 admissions were included in the SVOD data set but only a few of them (12 titles) made it to the top 100 SVOD.
- All the top 100 SVOD titles were from the US.

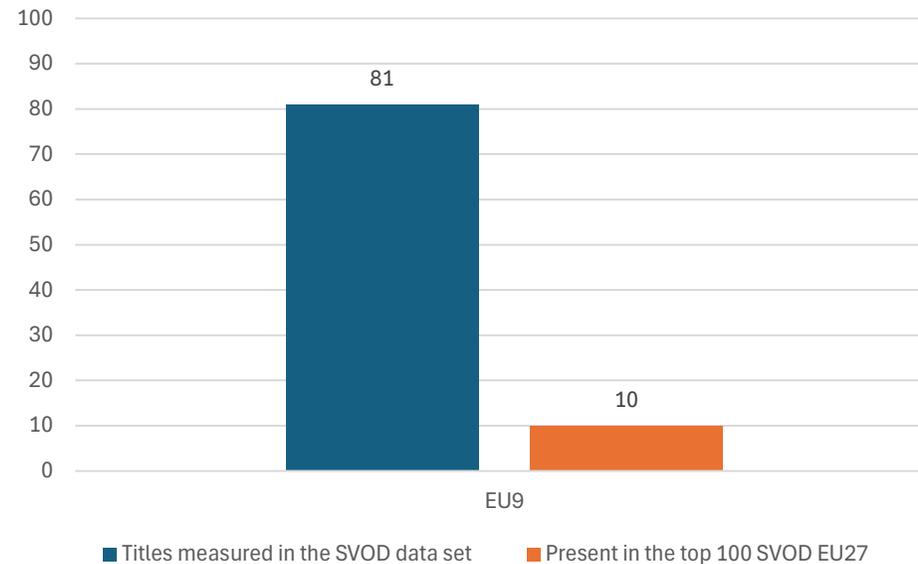


TOP 100 LUMIERE admissions since 2019 – Share of titles measured in SVOD and present in the top 100
In number of titles, EU9, all origins

Source: OBS based on Digital i data and LUMIERE

10 out of the top 100 theatrical EU27 films were in the top 100 EU27 films most watched on SVOD

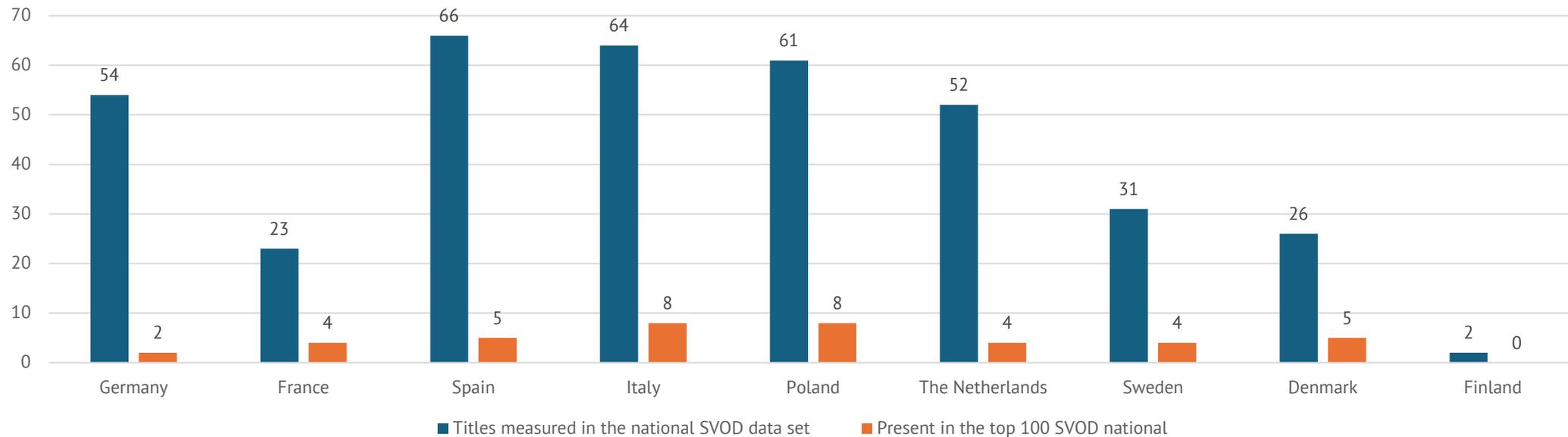
- Compared to titles of all origins, the most popular EU27 films were not as often available on streaming platforms.
- However, they were almost as present as titles of all origins in the top 100 most watched titles on SVOD.



TOP 100 LUMIERE admissions since 2019 – Share of titles measured in SVOD and present in the top 100
In number of titles, EU9, EU27 titles

Top national films by admissions available on SVOD rarely had the same success online

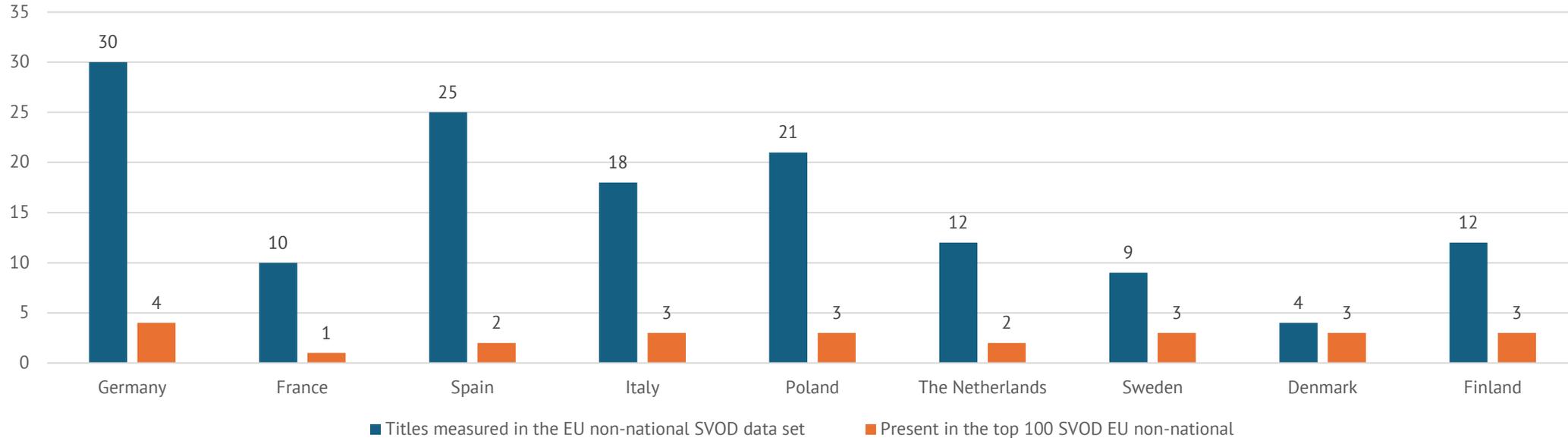
- Top national films by admissions were more frequently present on streaming platforms in Spain, Italy and Poland, whereas they were almost absent in Finland.
- Top national films by admissions were most prevalent in the top 100 SVOD viewing time in Italy and Poland, whereas they were absent in Finland.



TOP 100 LUMIERE national admissions since 2019 – Number of titles measured in SVOD and present in the top 100
In number of titles, EU9, national titles

Top EU non-national films by admissions were less available on streaming platforms

- Germany, Spain and Poland were the countries in which top non-national films by admissions were more frequently present on streaming platforms.
- It is in Germany that top EU non-national films by admissions were the most present in the top 100 SVOD EU non-national films by viewing time.
- Of all the countries, Finland was the only one in which the top non-national EU films by admissions were easier to find than the top national films on streaming services.



TOP 100 LUMIERE non-national films by admissions since 2019 – Number of titles measured in SVOD and present in the top 100
In number of titles, EU9, non-national titles

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