



# Film and TV content in TVOD, SVOD and FOD catalogues 2025 data

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November 2025

A publication of the European Audiovisual Observatory



Co-funded by the  
Creative Europe Programme  
of the European Union



- A. Key findings
- B. Origin of unique work titles (film and TV seasons titles) in VOD catalogue
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- D. Share EU national/EU non-national works (films and TV seasons)

## Annex

# Introduction

- The aim of this report is to provide an insight into the composition of **TVOD, SVOD and FOD catalogues in the 27 member states of the European Union** (hereafter EU27), looking at both film titles and TV seasons and their regions of origin.
- The report addresses **four research questions**:
  - What are the shares of film and TV season titles by region of origin in VOD catalogues, on a pan-European and country level?
  - What are the shares of films and TV seasons presences by region of origin in VOD catalogues, on a pan-European and country level?
  - What is the split of EU national and EU non-national films and TV seasons in VOD catalogues, on a pan-European and country level?
  - What are the differences by VOD services' business models in the composition of catalogues between SVOD, TVOD and FOD services?
- For film data, **187 TVOD catalogues, 837 SVOD catalogues and 182 FOD catalogues in 25 EU\* countries** were analysed based on JustWatch catalogue data. The data was collected in June 2025 and the titles were matched through databases with their countries of production. The consistency of data is obtained by matching each entry of each catalogue with a unique original title.
- For TV season data, the analysis was based on JustWatch data from **146 TVOD catalogues, 425 SVOD catalogues and 75 FOD catalogues in 25 EU\*** countries. The data was collected in June 2025 and the TV seasons were matched through databases with their countries of production.

# Methodology

- For the **origin of a title, only the first country of production was considered**. This approach is a proxy, as in a limited number of cases, minority coproductions can be considered as national productions under co-production agreements.
- **Four regions of origin are considered**: “EU27” titles have an EU27 country as first production country (with a split between **EU national** and **EU non-national** for presences). “**Other European**” titles have as a first production country a European country that is a member of the Council of Europe, “**US**” titles are from the United States of America and “**Non-US/non-European**” designates titles from all other origins.
- The shares included in this report are only indicative and minor identification errors might have occurred: About 1% of all titles are not identified and are not included in the statistics presented in this report. Minor rounding adjustments in the shares by region of origin have been made.
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# Methodology: glossary

- **TVOD (Transaction Video On Demand)**: services where consumers can rent or purchase a work on a title-per-title basis.
- **SVOD (Subscription Video On Demand)**: services which propose for a monthly fee a catalogue of works available on demand.
- **FOD (Free Video on Demand)**: services which are mostly ad-supported and free to view for viewers; this includes AVOD services and broadcaster replay services.
- **VOD (Video On Demand)**: in the context of this report, all TVOD, SVOD and FOD services of the sample.
- **Catalogue**: the full list of titles made available by an SVOD, TVOD or FOD service. Each country catalogue of global services is accounted for separately.
- **Film**: all feature films, fiction films, documentaries or other content available in the “Film” / “Movie” section of the TVOD, SVOD and FOD catalogue are considered.
- **TV season**: all content classified as “TV” in TVOD, SVOD and FOD catalogues is considered.
- **Unique titles – Film titles and TV season titles**: different titles present at least once in at least one catalogue. The number of presences is not considered. Titles available in TVOD, FOD and in SVOD are de-duplicated when considering all TVOD, FOD and SVOD catalogues.
- **Presences - Films and TV seasons**: sum of presences in VOD catalogues for each different title. Each individual presence of a title in a VOD catalogue or country are taken into account.

## A - Key findings

# A – Key findings (1/4)

## **A very diversified and large offer of different film and TV season titles exploited on VOD services in the EU<sup>(1)</sup>**

- 199 613 different film and TV season titles were exploited on VOD in June 2025. However, there are differences between the different types of VOD services and between the different types of works:
  - Films are mainly exploited on TVOD and on SVOD.
  - TV content is mainly exploited on SVOD.
  - FOD is still in its infancy and therefore plays a more limited role in the exploitation of works.
- As regards the origin of the works in exploitation, EU27 works accounted for 35% and other European titles, mainly produced in the United Kingdom, accounted for 11%, giving a total share of European works of 46% of all films and TV season titles exploited on VOD.

## **When considering the actual presence in catalogues<sup>(2)</sup>, the share of EU27 works is significantly lower (22%)**

- As TV series are counted by number of seasons<sup>(3)</sup>, films account for a massive 85% of the presence of all types of works on VOD.
- While the EU27 accounted for 35% of all different titles exploited on VOD, it represented only 22% of the presences<sup>(2)</sup> as each EU27 title was present in fewer catalogues than US titles. Works of other European origin, mainly produced in the United Kingdom, accounted for 10%, giving a total share of 32% of European works.

## **The vast majority (more than 69%) of EU27 works were non-national works.**

- When other European works are included, national works only accounted for only 21% of all European works available on VOD.

## **Compared to the 2024 data, the variances are minimal (around 1–2% for the key indicators).**

<sup>(1)</sup> Figures in this paragraph refer to "unique works". Any work available on VOD in at least one service or country is counted as one. The figures reflect the structure of the portfolio of works in exploitation on VOD.

<sup>(2)</sup> Figures in this and the following paragraphs refer to presences. Each presence in one VOD catalogue is counted. These figures reflect the structure of the offer available to consumers.

<sup>(3)</sup> In accordance with the European Commission guidelines on the assessment of quotas for VOD services.

## A – Key findings (2/4)

But there are differences between the different types of VOD services:

- Global SVOD services rely less on films (still 72% of presences) and more on TV series. They rely more on EU27 non-national works than on national works than TVOD and FOD and also more on works from outside Europe and the USA.
- TVOD services offer primarily films (95% of presences) and therefore, as regards EU27 films, mirror the cinema offer, relying more on national films than SVOD (mainly in high volume film producing countries such as France, Germany and Italy).
- FOD services, often managed by broadcasters, reach a higher proportion of EU27 works, with more national works and less non-national works than TVOD and SVOD.

There are also differences between the different types of works:

- The share of EU27 works is much higher for films (24%) than for TV content (15%)<sup>(1)</sup>, while for TV content, the share of non-national EU27 content is much lower, especially for TVOD and FOD.
- Compared to the 2024 data, the variances are minimal (around 1–2% for the key indicators).**

Origin of all works by region of origin  
by business models, in shares of total presences

All works (in %)	SVOD	TVOD	FOD	All business models
EU national	5%	8%	10%	7%
EU non-national	17%	13%	14%	15%
<b>All EU</b>	<b>23%</b>	<b>21%</b>	<b>25%</b>	<b>22%</b>
Other European	10%	11%	10%	10%
<b>All Europe</b>	<b>32%</b>	<b>33%</b>	<b>35%</b>	<b>33%</b>
Non-US/non-European	29%	12%	14%	20%
US	39%	55%	51%	48%

Origin of all works by region of origin  
by type of works, in shares of total presences

All works (in %)	Films	TV seasons	All films and TV seasons
EU national	7%	6%	7%
EU non-national	17%	9%	15%
<b>All EU</b>	<b>24%</b>	<b>15%</b>	<b>22%</b>
Other European	10%	10%	10%
<b>All Europe</b>	<b>34%</b>	<b>25%</b>	<b>32%</b>
Non-US/non-European	18%	29%	20%
US	48%	46%	48%

Source: OBS on JustWatch catalogue data

<sup>(1)</sup> The share of EU27 works in catalogues would therefore be lower should episodes and not seasons be considered.

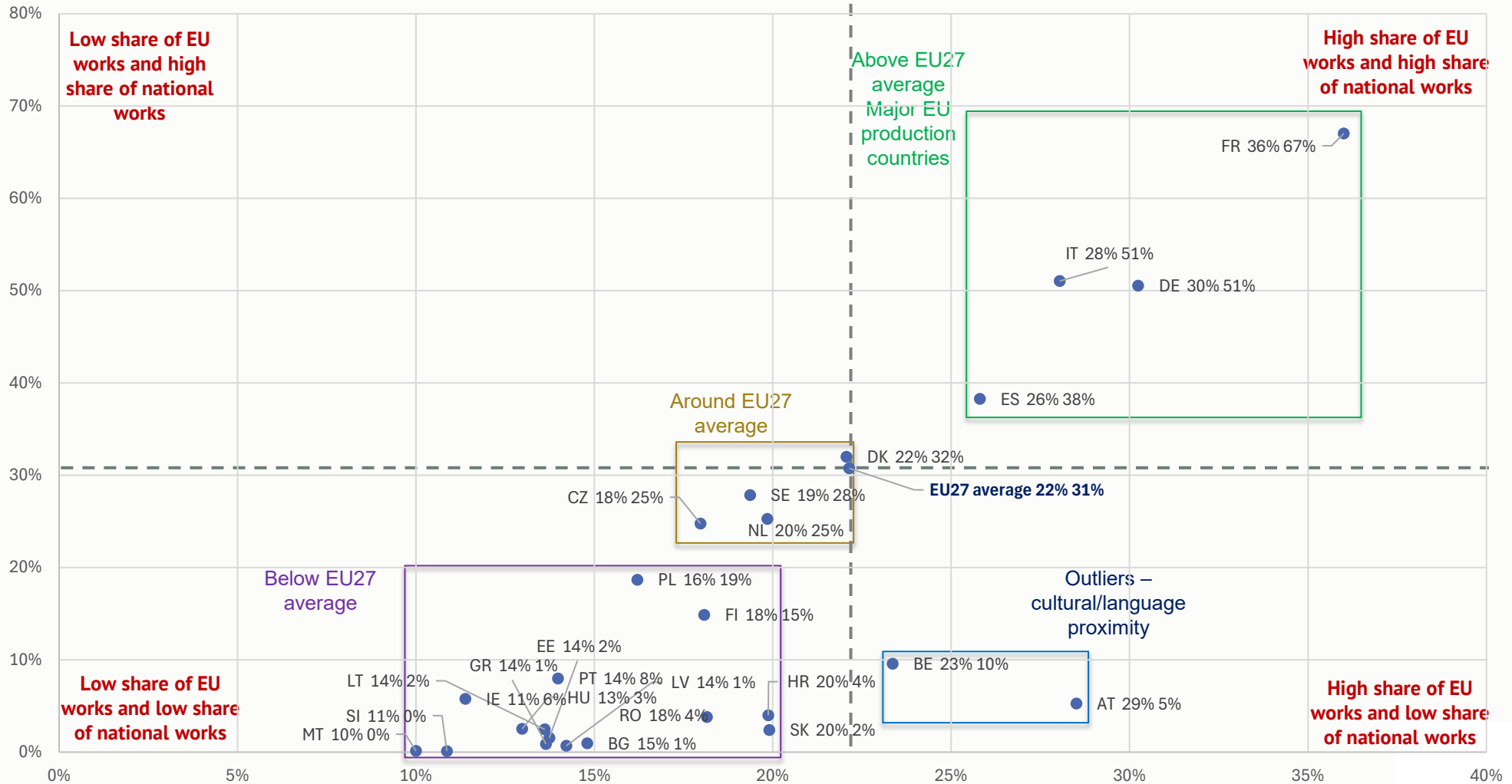


### The share of EU works in VOD catalogues varied widely between EU countries

- The graph on the next slide shows a clustering of EU27 countries based, on the one hand, on the share of EU27 works in catalogues and, on the other hand, on the share of national works in EU27 works. It shows four main groups of countries:
  - Four **major audiovisual production countries** had a high share of national and therefore of EU works: France, Germany, Italy and Spain.
  - Four countries with **well-developed audiovisual industries** had shares of national and EU works around the EU average: Denmark, Czechia, the Netherlands and Sweden.
  - Fifteen countries with **less developed audiovisual industries** had low proportions of national and EU works: Bulgaria, Croatia, Estonia, Finland, Greece, Hungary, Ireland, Lithuania, Latvia, Malta, Poland, Portugal, Romania, Slovenia and Slovakia.
  - Two **outliers** had a low share of national works and an above-average share of non-national EU works, mainly produced in culturally close neighbouring countries sharing a common language: Austria and Belgium.

# A – Key findings (4/4)

Share of EU27 works and share of national works out of EU27 works in VOD catalogues by country  
in shares of total works and shares of EU27 works



## B - Origin of unique work titles in VOD catalogues

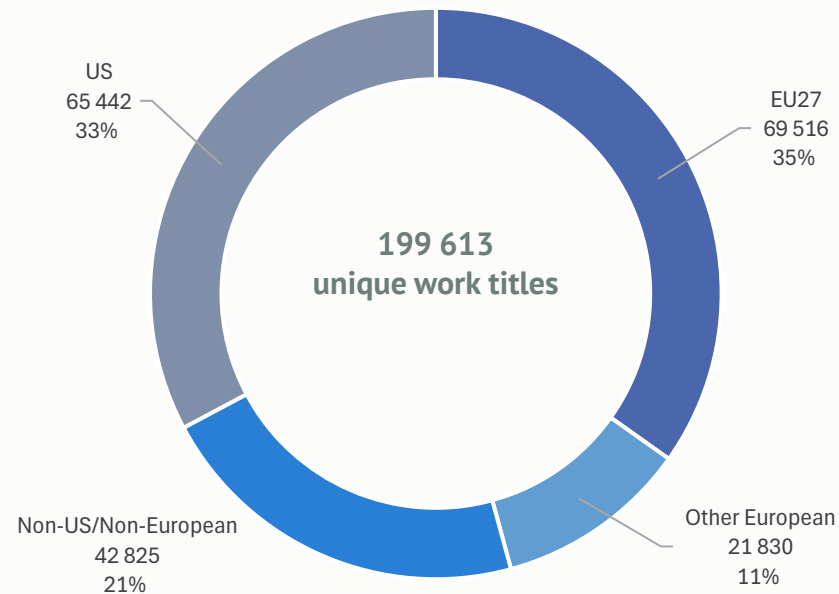
- This section deals with **unique work titles (all work titles, film titles, TV season titles)**, i.e. work titles which were available at least once in any VOD catalogue.
- For pan-European data, the number of countries and catalogues in which the work title was present is not taken into account.
- For country-level data, the number of catalogues in which the work title was present in the country is not taken into account.

## B – Origin of unique work titles in VOD catalogues

**35% of all unique works available were of EU27 origin, while 11% were of other European origin**

- With over 69 500 titles, film and TV season titles from the EU27 represented the largest share of unique works available on VOD in the 25 EU27 countries, representing 35% of all unique work titles.
- Titles from other European countries, mainly the United Kingdom, accounted for a further 11%, giving European titles a total share of 46%. US titles accounted for 33% of all available works, with over 65 400 titles.
- Non-US/non-European titles accounted for 21%, with over 42 800 titles.

Origin of unique work titles (film and TV season) by region of origin  
*All 25 EU27 countries, all business models, in number of unique work titles available*



Less than 1% of all film titles could not be identified.

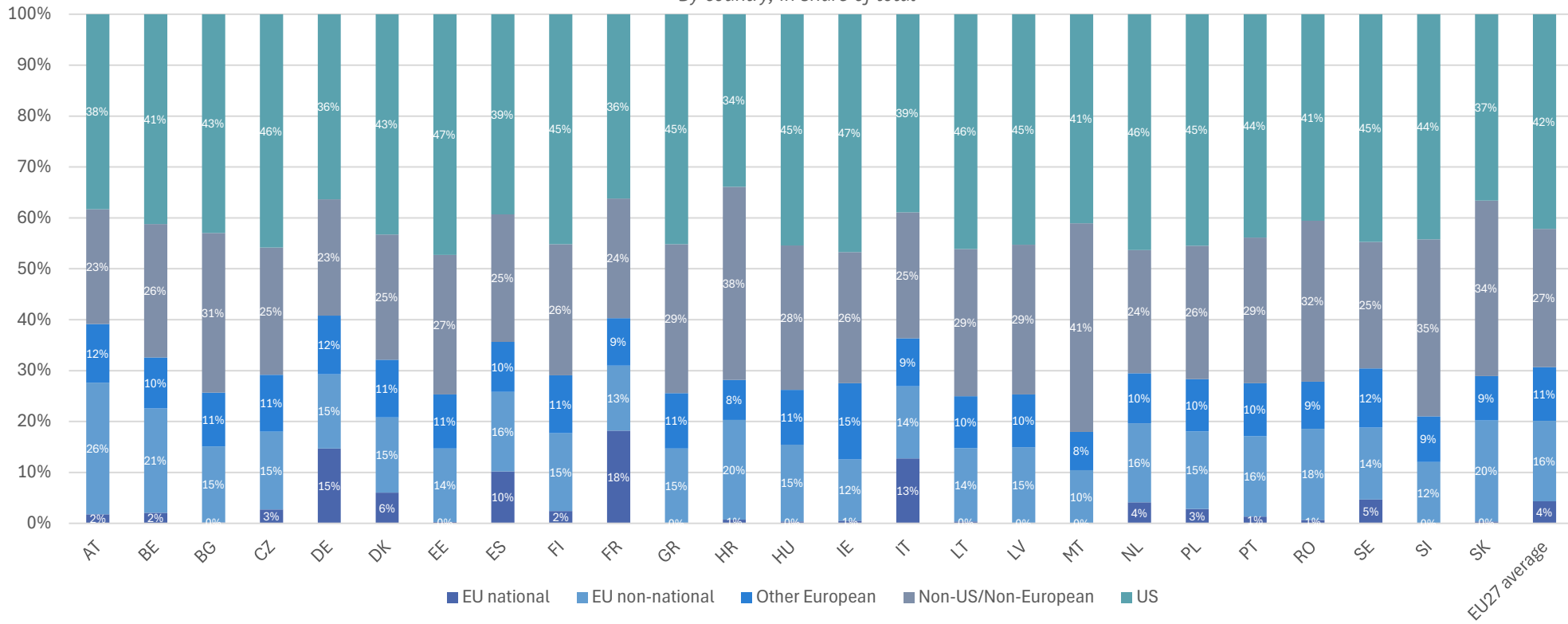
Source: JustWatch catalogue data

## B – Origin of unique work titles in VOD catalogues

At country level, between 10% and 31% of the available work titles were produced in the EU27.

- EU27 titles accounted for 31% of all work titles in France, 29% in Germany, 28% in Austria and 27% in Italy, while representing less than 15% in six countries (Lithuania, Estonia, Greece, Ireland, Slovenia and Malta).
- The highest shares of EU national titles were found in France, Germany, Italy and Spain (from 18% to 10%), while the lowest shares, of less than 1%, were found in 12 countries (Croatia, Romania, Ireland, Hungary, Lithuania, Slovakia, Estonia, Bulgaria, Greece, Latvia, Slovenia and Malta).
- Austria, Belgium, Croatia and Slovakia had the highest share of EU non-national titles, with titles from culturally similar neighbouring countries made available on VOD services, while France, Ireland, Slovenia and Malta had the lowest share.

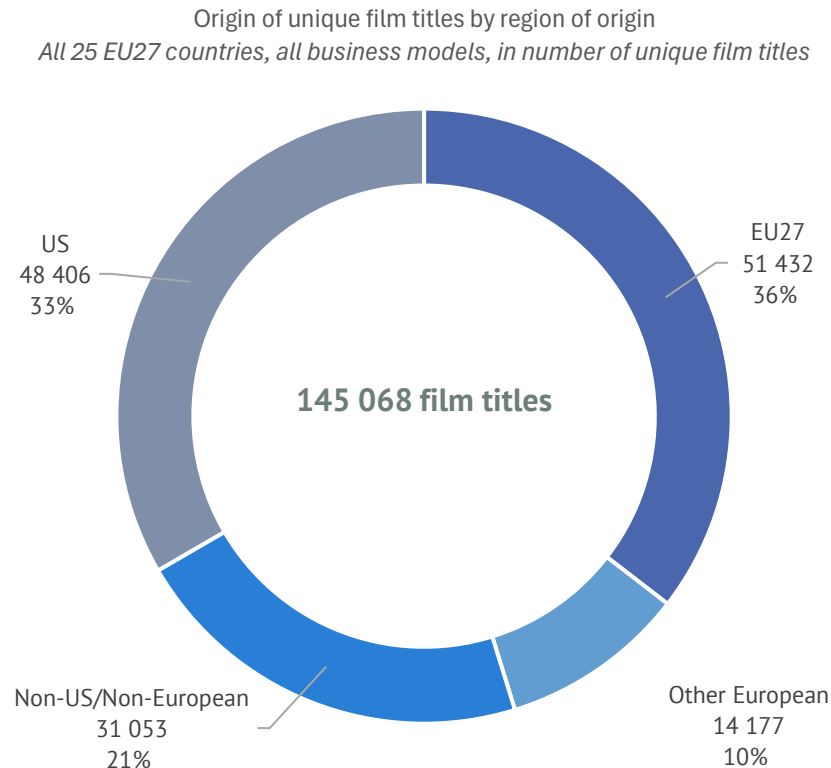
Origin of unique work titles (film and TV seasons) by region of origin  
By country, in share of total



## B – Origin of unique work titles in VOD catalogues – Unique film titles

46% of all unique film titles available in VOD catalogues are of European origin.

- Of the 145 068 different film titles available, 46% were European, with EU27 titles accounting for 36% and other European titles accounting for 10%.
- US film titles accounted for 33% of all film titles available, with more than 48 400 titles.
- Non-US/non-European titles accounted for 21% of the total, with titles produced in five countries (India, Canada, Japan, Australia and China) representing 59% of these (Indian titles alone accounting for 31%).



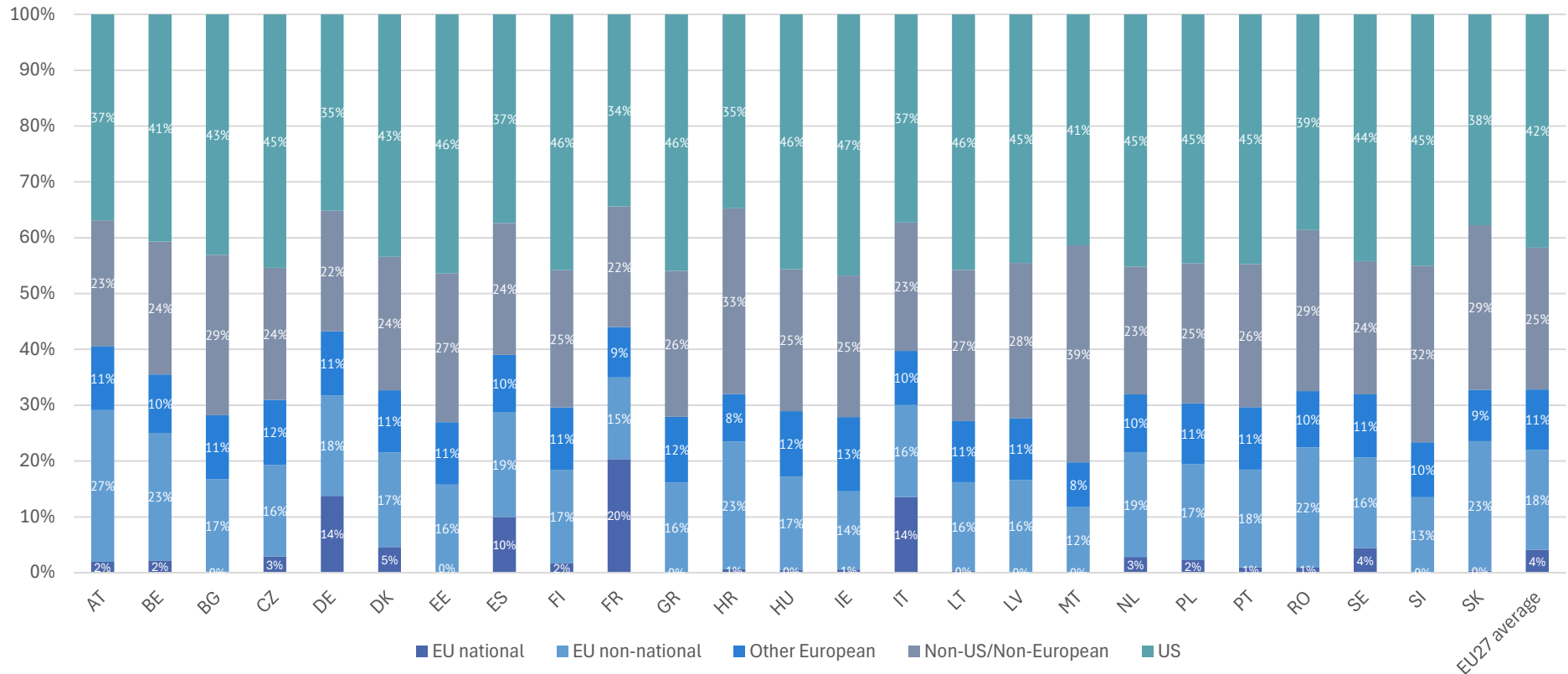
Source: JustWatch catalogue data

## B – Origin of unique work titles in VOD catalogues – Unique film titles by country

On a country level, an average of 22% of film titles available on VOD are of EU27 origin.

- The highest shares of EU27 film titles were found in countries with a high proportion of national film titles. These were 35% in France, 32% in Germany, 30% in Italy and 29% in Spain; all of these countries had above-average shares of national film titles.
- In Austria and Belgium, the share of EU27 film titles was raised by EU non-national titles from Germany and France, and the Netherlands.
- A low availability of national film titles in Bulgaria, Latvia, Lithuania, Greece, Estonia, Ireland, Slovenia and Malta meant that these countries had the lowest share of EU27 film titles available, at 17% or less.

Origin of unique film titles by region of origin  
By country, in share of total

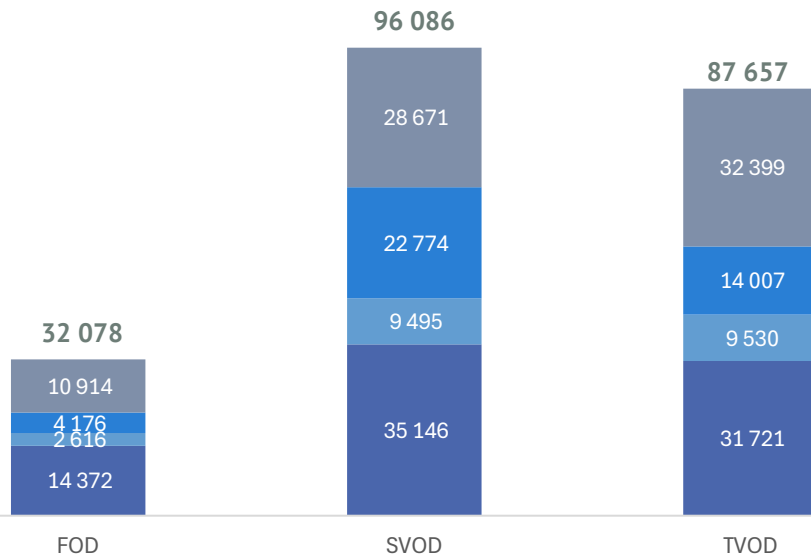


## B – Origin of unique work titles in VOD catalogues – Unique film titles by business model

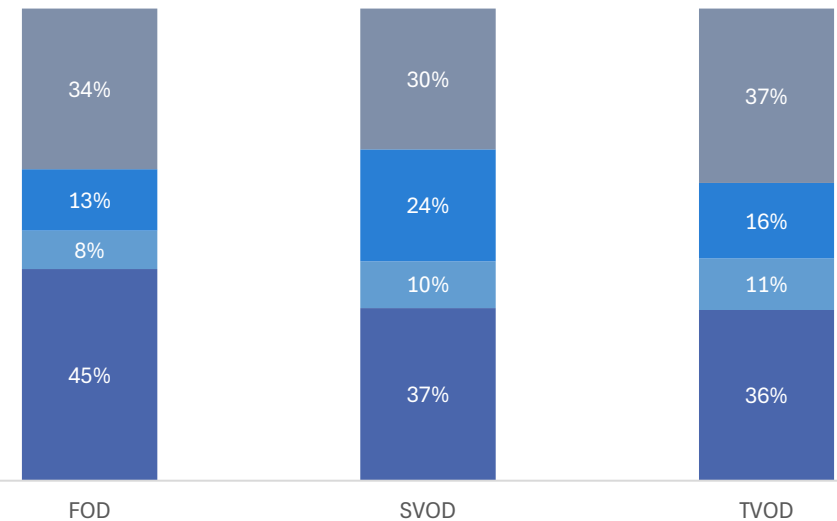
There are many more film titles available on SVOD and TVOD than on FOD. SVOD offers a wider selection of non-US and non-European films, while TVOD offers a wider selection of US films.

- With over 96 000 different film titles available on SVOD (across 837 catalogues in 25 EU27 countries) and 87 600 on TVOD (187 catalogues), there were many more film titles available than on FOD (32 000 across 182 catalogues).
- The SVOD film offering appeared to be more diverse, with 24% of titles from non-US/non-European countries, which is much higher than in the catalogues of other business models. European film titles represented 47% of the total, with EU27 titles accounting for 37%.
- On TVOD, US and other European (mainly UK) film titles accounted for the highest share of all three business models, at 37% and 11% respectively.
- On FOD, EU27 titles accounted for 45% of all titles, helped by the presence of several national broadcasters' BVOD services in the sample.

Origin of unique film titles by region of origin by business model  
All 25 EU27 countries, in numbers



Origin of unique film titles by region of origin by business model  
All 25 EU27 countries, in shares of total



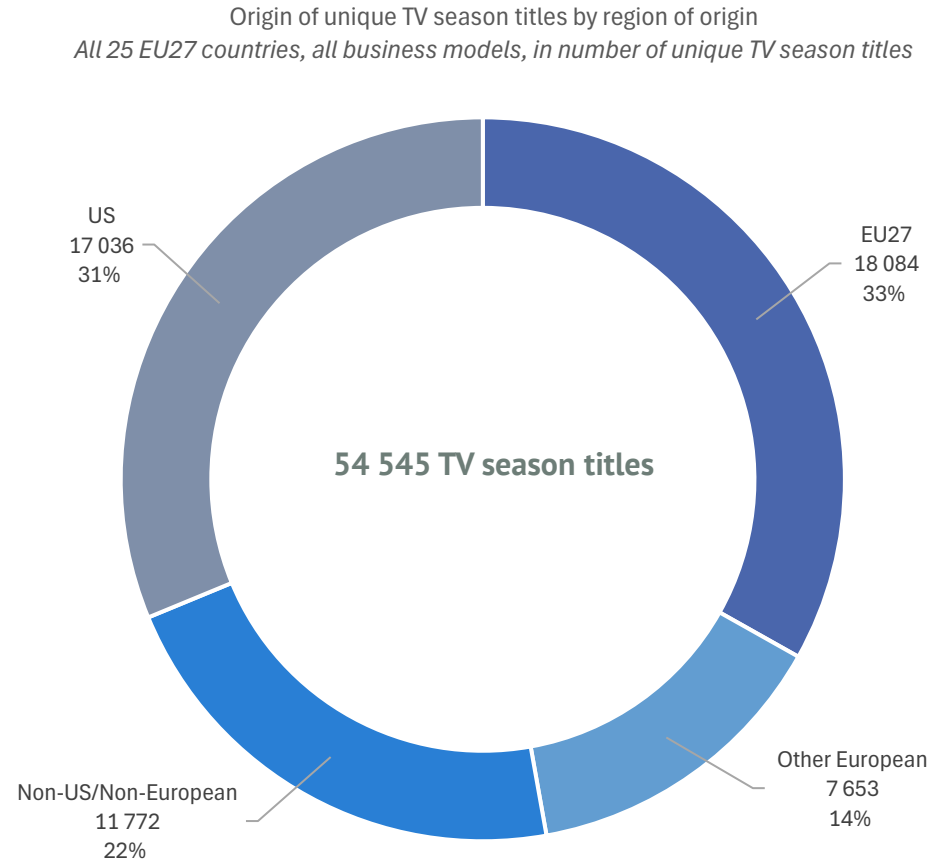
■ EU27 ■ Other European ■ Non-US/Non-European ■ US



## B – Origin of unique work titles in VOD catalogues – Unique TV season titles

Of the 54 545 unique TV seasons available on VOD, 47% are of European origin and 31% are of US origin.

- With over 18 000 EU27 titles (33%) and 7 650 from other European countries (14%), European titles represented 47% of the 54 545 TV seasons available on VOD in 25 EU27 countries.
- US TV seasons accounted for 31%, while non-US/non-European TV seasons represented a further 22%.

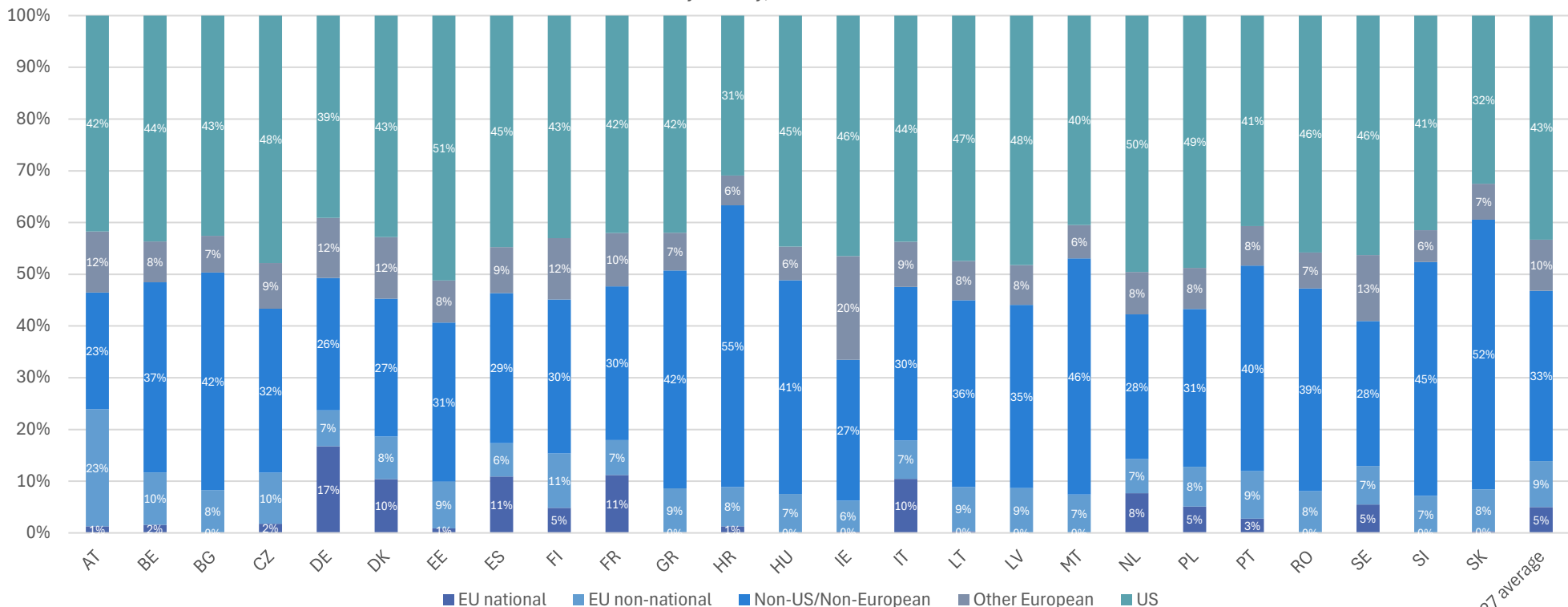


# B – Origin of unique work titles in VOD catalogues – Unique TV season titles by country

At country level, between 13% and 36% of all TV season titles were of European origin.

- The countries with the highest shares of European TV season titles were Austria (36%), Germany (35%), Denmark (31%) and France (28%), while the countries with the lowest shares were Hungary (14%), Malta (14%) and Slovenia (13%).
- The six countries with the highest share of EU27 TV season titles (17% and above) were all those with a share of national TV season titles above 10% (Germany, Denmark, France, Italy, Spain), and also Austria having the highest share of EU non-national TV season titles at 23% (more than double that of the second-highest country, Finland, at 11%, and far above the EU27 average of 9%).
- Five countries had a higher proportion of non-US/non-European titles than US titles: Croatia, Slovakia, Malta, Slovenia and Greece.

Origin of unique TV season titles by region of origin  
By country, in share of total



Source: JustWatch catalogue data

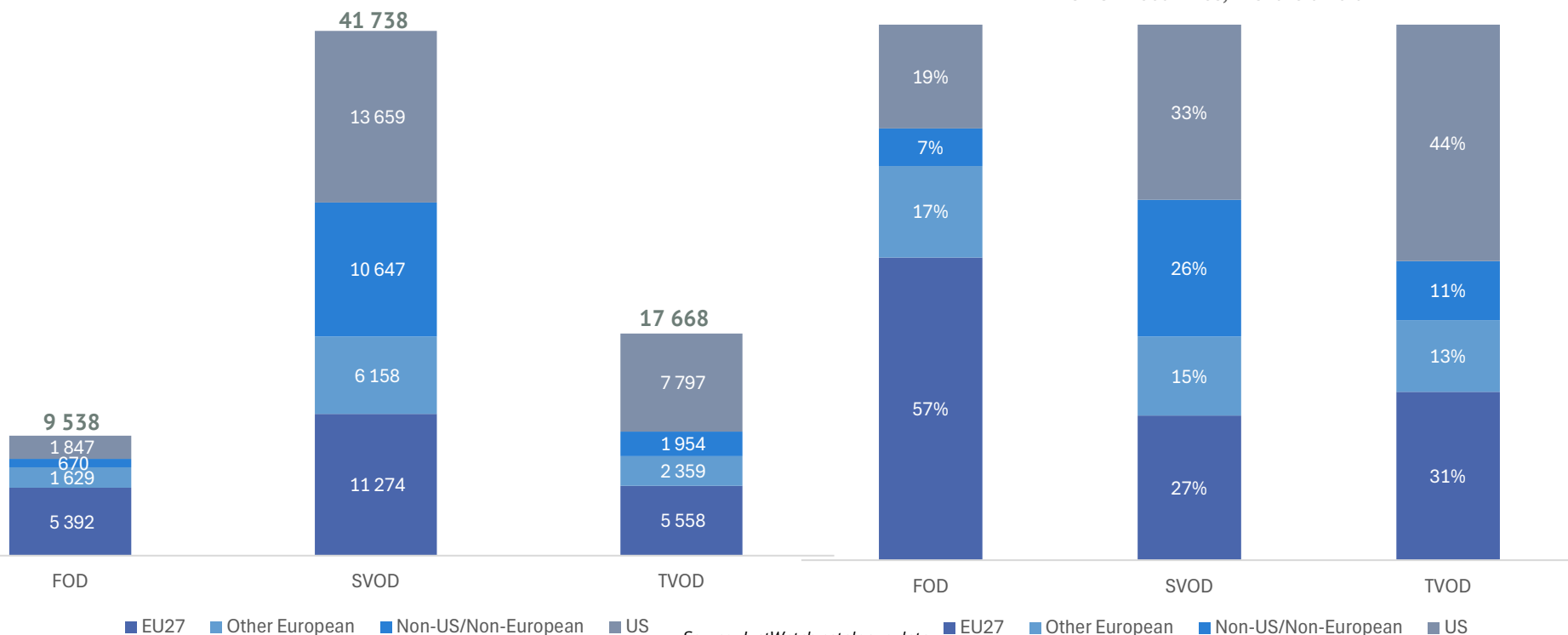
## B – Origin of unique work titles in VOD catalogues – Unique TV season titles by business model

A very diverse TV offering on SVOD, a more European-influenced offering on FOD, and a more US-focused offering on TVOD.

- SVOD services offered the largest number of different TV seasons, with over 41 700 titles across 425 catalogues. This was followed by TVOD services, which offered over 17 600 titles across 146 catalogues, and FOD services, which offered just over 9 500 titles across 75 catalogues.
- On FOD, EU27 TV seasons accounted for the largest share, at 57% of all available titles.
- On SVOD, the selection was diverse, with around a third of all TV season titles being US and 27% being EU27. TV seasons of non-US/non-European origin made up 26% – the largest share of the three business models – showing the increased importance of international titles for SVOD services.
- On TVOD, US titles represented 44%, followed by EU27 titles at 31%.

Origin of unique TV season titles by region of origin by business model  
All 25 EU27 countries, in numbers

Origin of unique TV season titles by region of origin by business model  
All 25 EU27 countries, in share of total



Source: JustWatch catalogue data

## C - Origin of works in VOD catalogues

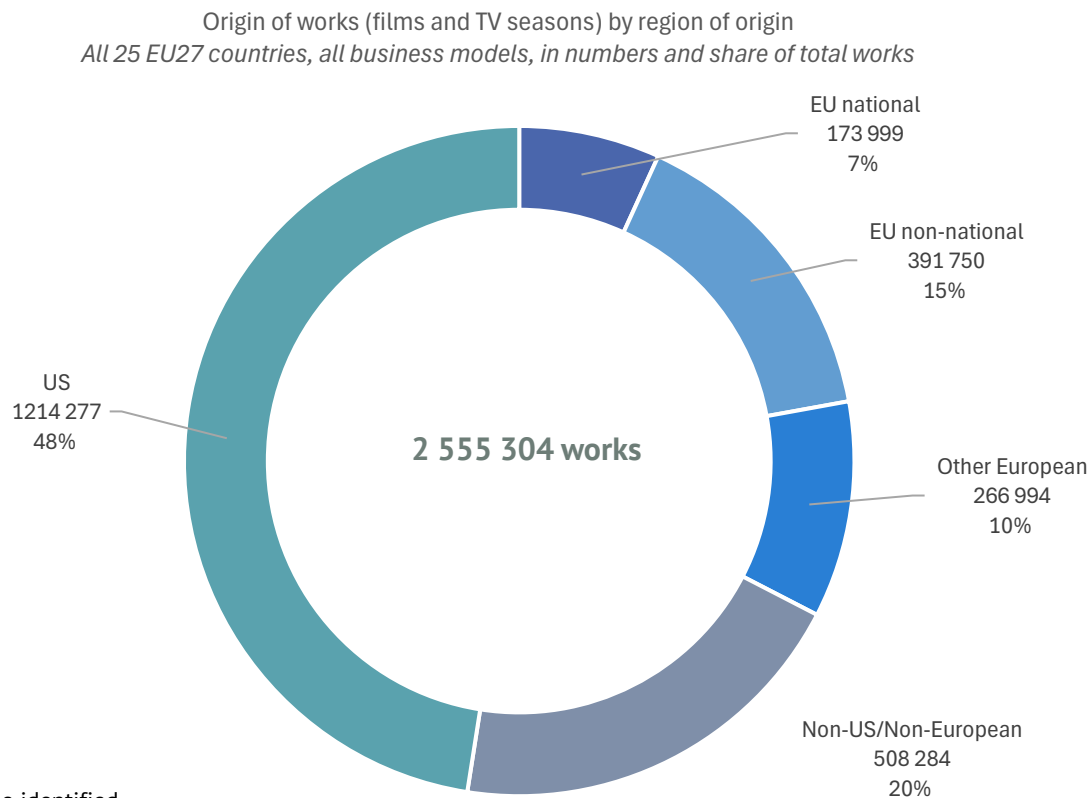
- This section deals with **presences of works (all works, films, TV seasons)**, the number of countries and catalogues in which the work was present is taken into account.
- For pan-European data, the number of countries and catalogues in which the work was present is taken into account.
- For country-level data, the number of catalogues in which the work title was present in the country is taken into account.

### Origin of works in VOD catalogues: all works

## C – Origin of works in VOD catalogues – All works

Works from the EU27 accounted for 22% of all works present in VOD catalogues.

- With more than 565 700 presences in VOD catalogues across 25 countries, EU27 works represented 22% of all available works (films and TV seasons). The majority of EU27 works were non-national EU works, accounting for 15% of works in VOD catalogues, while national works accounted for 7%.
- Works of other European origin accounted for 10% of all catalogue presences with 266 994 works.
- Non-US/non-European works made up 20%, with over 508 280 films and TV seasons present.
- US works accounted for 48% of the more than 2.5 million works present in VOD catalogues for a total of more than 1.2 million works.



Less than 2% of all works could not be identified.

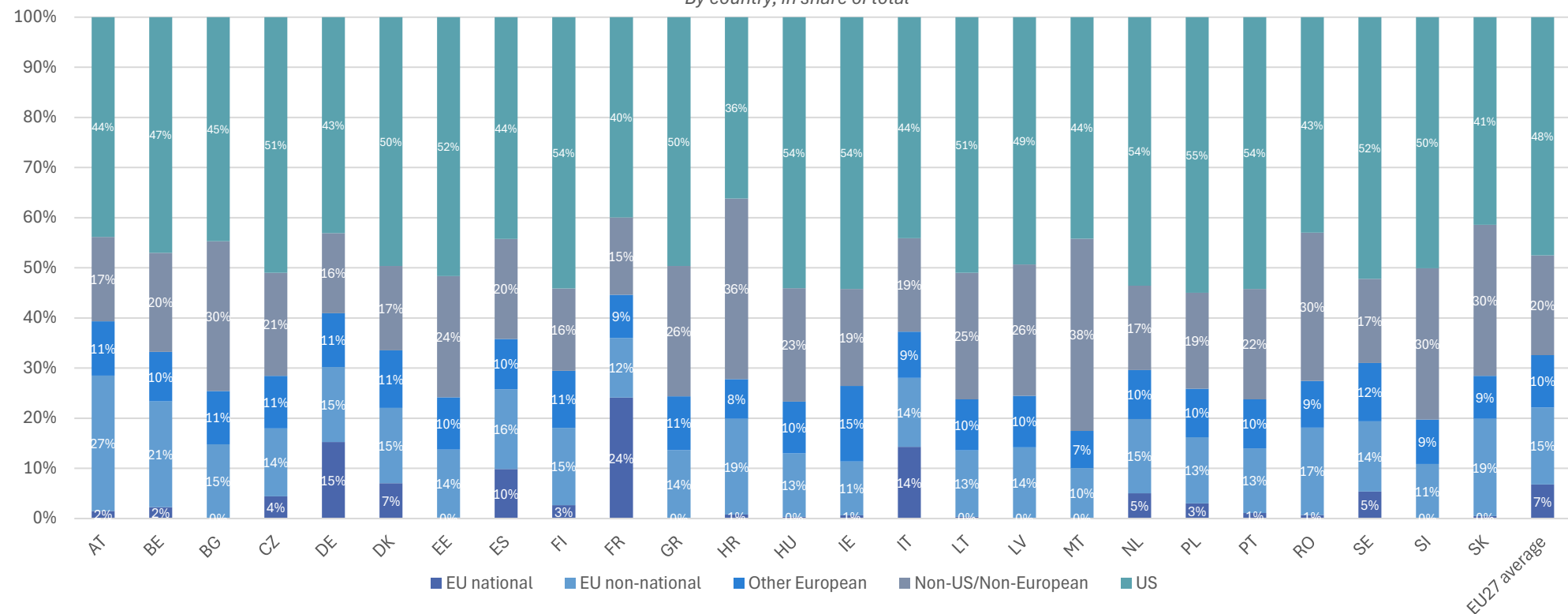
Source: JustWatch catalogue data

## C – Origin of works in VOD catalogues – All works by country

Between 17% and 45% of all works in VOD catalogues were of European origin, and between 10% and 36% were from the EU27.

- The highest shares of European works were found in VOD catalogues in France (45%), Germany (41%), Austria (39%), Italy (37%), Spain (36%) and Denmark (34%), while the lowest shares were found in Malta (17%), Slovenia (20%) and Hungary (23%).
- The proportion of EU27 works ranged from 10% in Malta to 36% in France. Countries with high shares of EU27 works (and thus European works) either had above-average shares of national works for major production countries (France, Germany, Italy and Spain) or above-average shares of EU non-national works (Austria and Belgium), with works from culturally close/language similar EU countries.
- Eleven countries had a share of US works above 50% (Poland, Ireland, Portugal, Finland, Hungary, the Netherlands, Sweden, Estonia, Czechia, Lithuania and Slovenia), and four countries had a share of non-US/non-European works above 30% (Malta, Croatia, Slovenia and Slovakia).

Origin of works (films and TV seasons) by region of origin  
By country, in share of total



Source: JustWatch catalogue data

### Origin of works in VOD catalogues: films

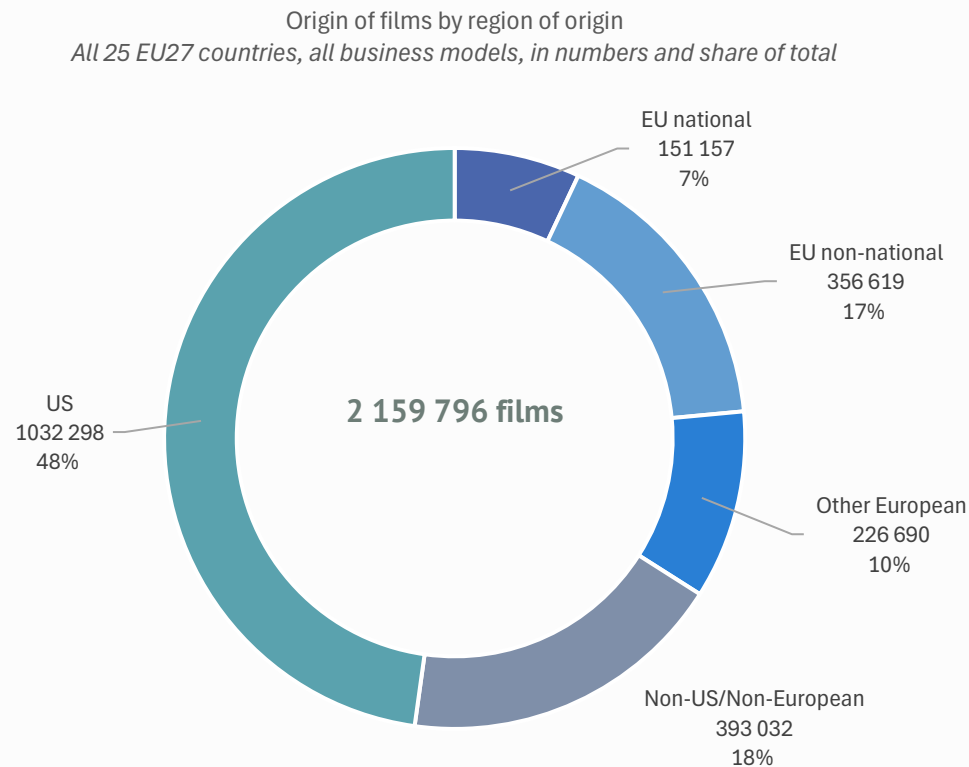
- This section deals with **presences of films**, the number of countries and catalogues in which the film was present is taken into account.
- For pan-European data, the number of countries and catalogues in which the film was present is taken into account.
- For country-level data, the number of catalogues in which the film was present in the country is taken into account.



## C – Origin of works in VOD catalogues - Films

Of all the films available on VOD, 24% were produced in the EU27, while 10% originated from other European countries.

- Of the more than 2.1 million films available in VOD catalogues across 25 countries, 24% originated from the EU27 (with 7% of national origin and 17% of EU non-national origin). Additionally, 10% of films were produced in other European countries, raising the proportion of European films to 34%.
- The largest proportion of films were produced in the US, accounting for 48% of all films and representing over 1 million film presences in VOD catalogues.
- Non-US/non-European films accounted for 18%, with over 393 000 film presences in VOD catalogues.

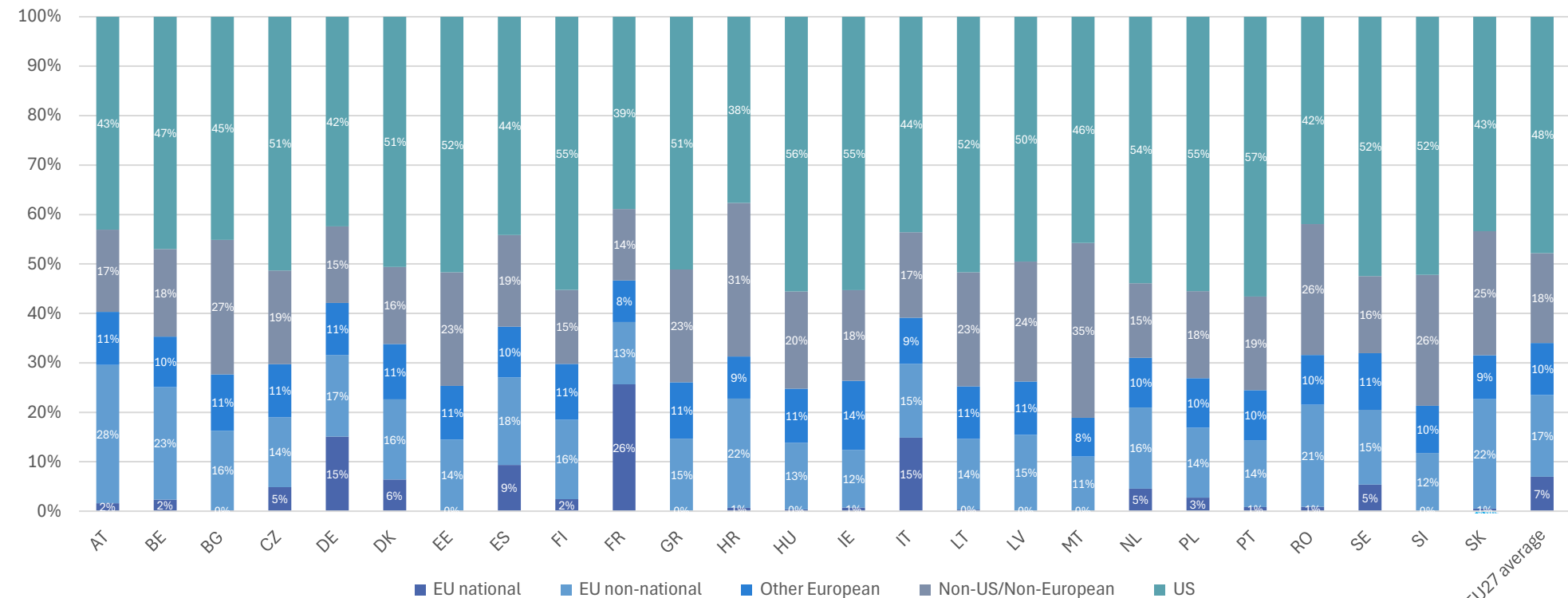


## C – Origin of works in VOD catalogues – Films by country

On average, 34% of all films are of European origin, ranging from 19% in Malta to 47% in France.

- France had the highest proportion of European films in its VOD catalogues (47%), followed by Germany (42%), Austria (40%), Italy (39%), Spain (37%) and Belgium (35%). As with titles, major production countries benefit from a higher share of national films in VOD catalogues, while Austria and Belgium's higher share of EU27 non-national films originates from the presence of German and French/Dutch films, respectively. The lowest shares of European films were found in Malta (19%), Slovenia (21%), Portugal (24%), Hungary (25%), and Lithuania (25%). These countries also had some of the lowest shares of national films in VOD catalogues out of the 25 countries.
- Only five countries had more than 20% EU non-national films: Austria (28%), Belgium (23%), Slovakia (22%), Croatia (22%) and Romania (21%).

Origin of films by region of origin  
By country, in share of total



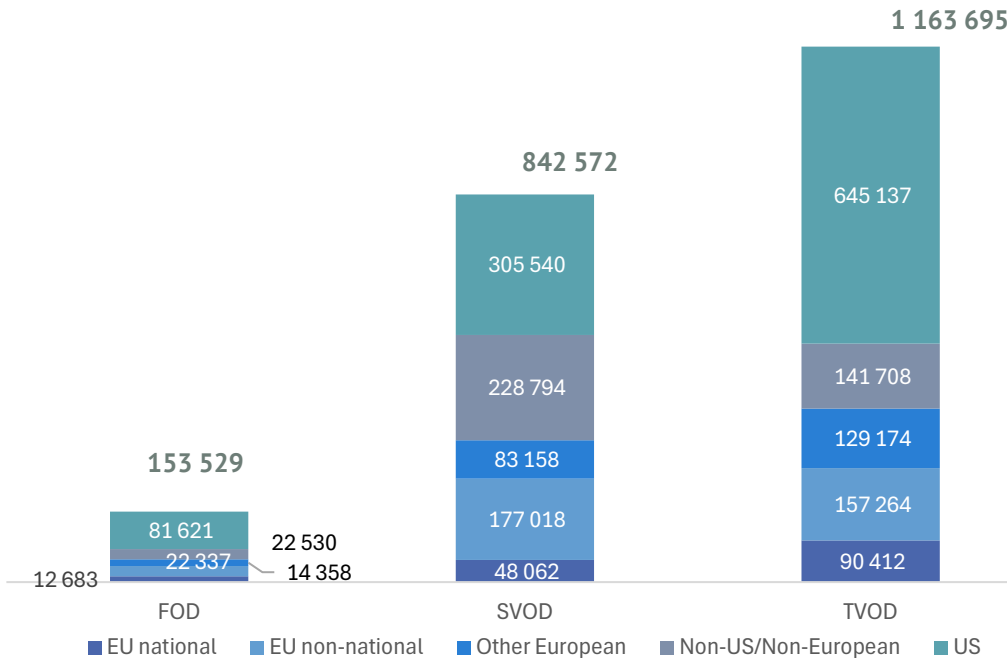
Source: JustWatch catalogue data

# C – Origin of works in VOD catalogues – Films by business model

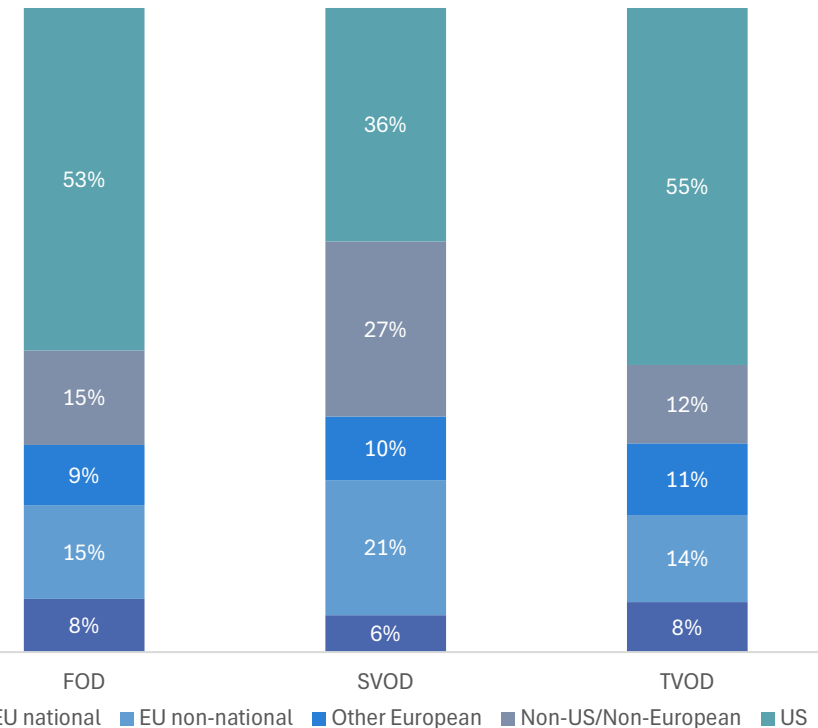
There is a greater diversity of films in SVOD catalogues than in TVOD and FOD catalogues, with US films accounting for more than half of the films available on the latter two.

- US films accounted for over 50% of all films available on TVOD and FOD services, whereas their share was only 36% on SVOD services.
- This indicates a growing reliance on non-US/non-European films by global SVOD providers to supplement their catalogues. Non-US/non-European films accounted for 27% of SVOD catalogues, compared to 12% and 15% in TVOD and FOD catalogues, respectively.
- EU27 films represented 27% of the catalogue on SVOD services, 23% on FOD services, and 22% on TVOD services. However, national films had the lowest share on SVOD services at 6%, compared to 8% on FOD and TVOD services.
- Conversely, SVOD services had the highest share of EU non-national films at 21%, followed by FOD and TVOD services at 15% and 14%, respectively.

Origin of films by region of origin by business model  
All 25 EU27 countries, in numbers



Origin of films by region of origin by business model  
All 25 EU27 countries, in shares of total

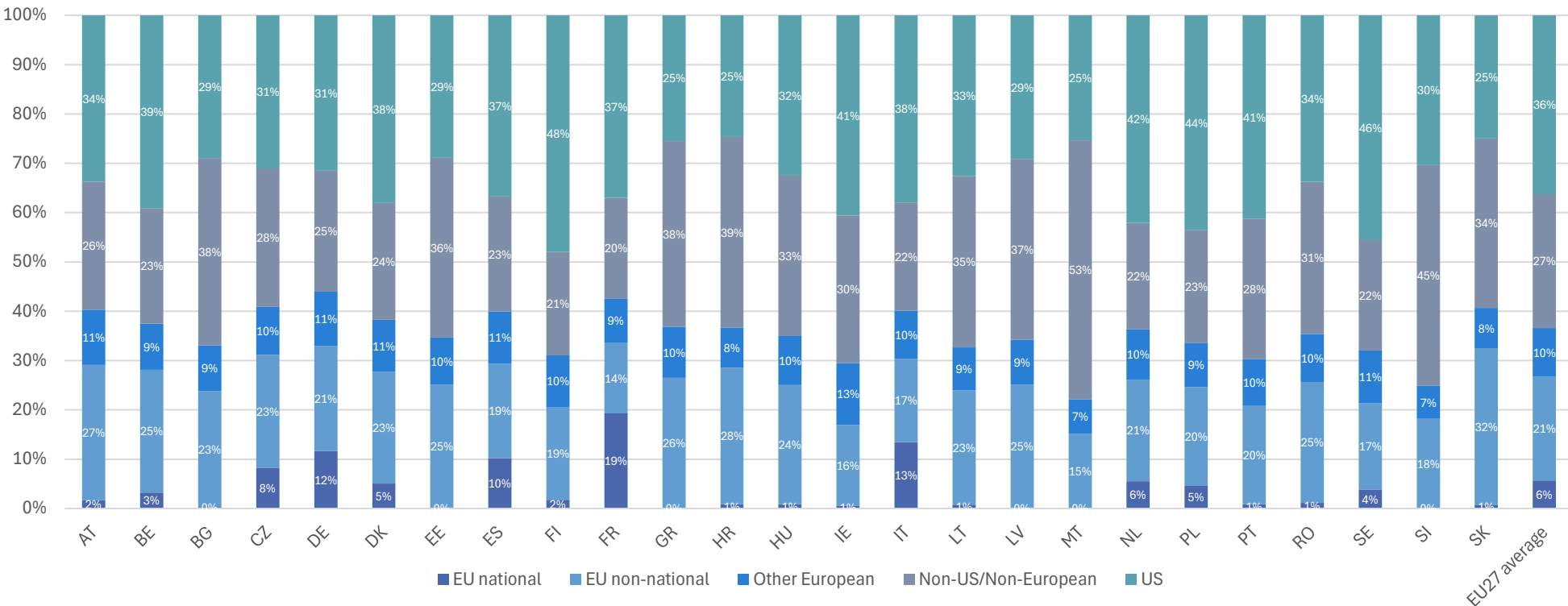


# C – Origin of works in VOD catalogues – Films on SVOD services by country

On average, 36% of all films are of European origin, ranging from 22% in Malta to 44% in Germany.

- Of EU27 films, the highest shares were reached in France (34%), Germany (33%), Slovakia (32%), Czechia (31%), and Italy and Spain (29%), while Malta (15%), Ireland (17%), and Slovenia (18%) had the lowest shares.
- Only France, Germany, Italy and Spain, the major film production countries, had a share of national films above 10%.
- Slovakia, Croatia, Austria, Greece, Belgium, Estonia, Latvia, Romania and Hungary had a share of EU non-national films above 24%.
- Six countries had a share of US films above 40%, and seven had a share of non-US/non-European films above 35%.

SVOD - Origin of films by region of origin  
By country, in share of total

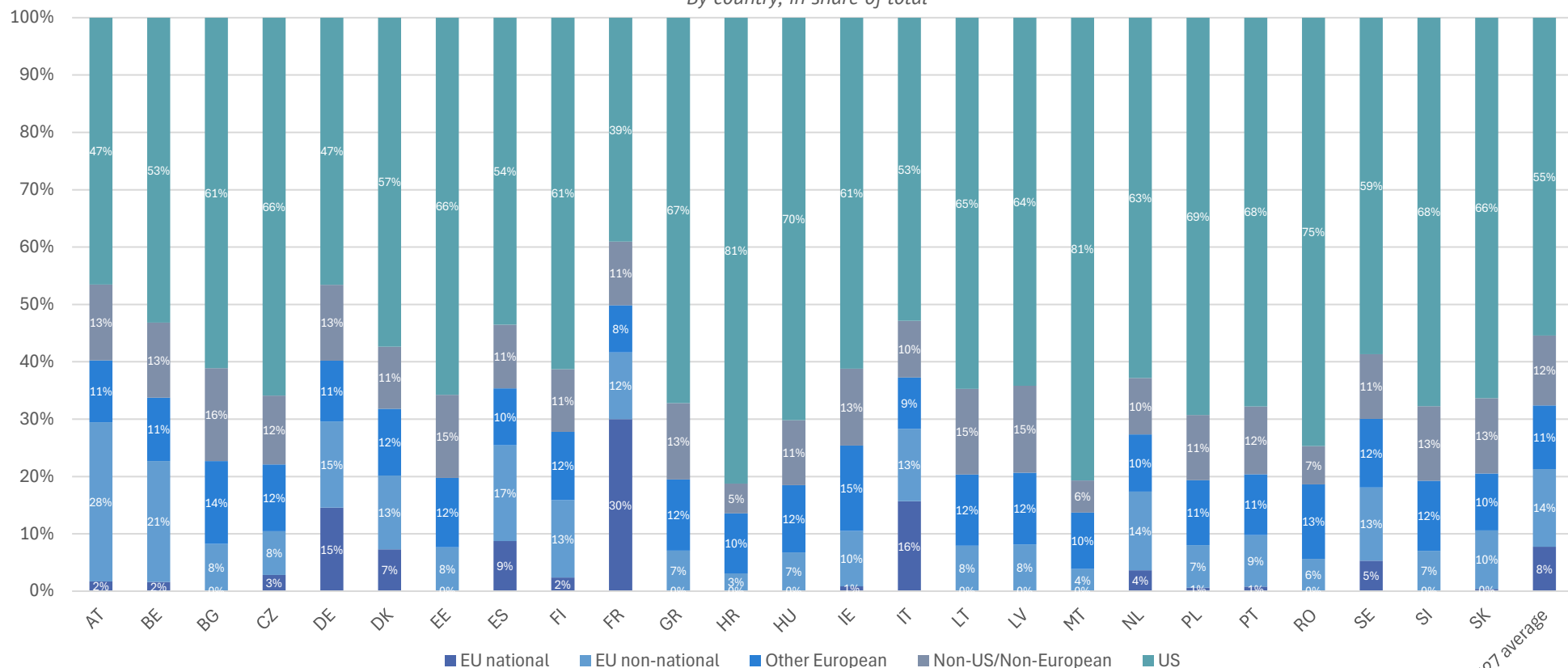


# C – Origin of works in VOD catalogues – Films on TVOD services by country

On average, 33% of all films are of European origin, ranging from 14% in Croatia to 50% in France.

- The highest proportion of EU27 films was found in TVOD catalogues in France (42%), followed by Germany (30%), Austria (29%), Italy (28%) and Spain (25%). The lowest shares were found in Croatia (3%), Malta (4%) and Romania (6%).
- US films accounted for more than 50% in all countries except France, Germany and Austria, where a higher proportion of national or EU non-national films lowered the proportion of US films slightly compared to other countries.
- Non-US/non-European films represented between 5% in Croatia and 16% in Bulgaria of all films available in TVOD catalogues.

TVOD - Origin of films by region of origin  
By country, in share of total



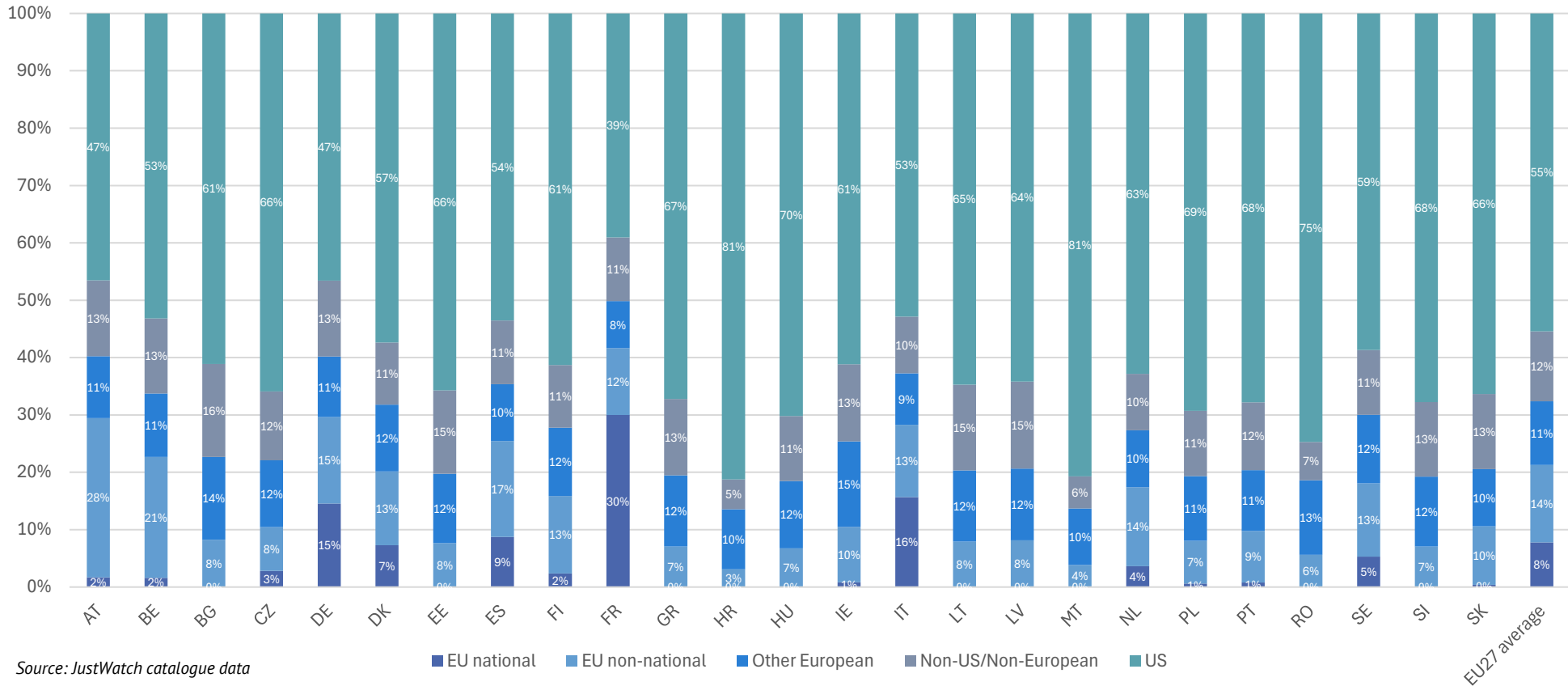
Source: JustWatch catalogue data

# C – Origin of works in VOD catalogues – Films on TVOD services by country

On average, 33% of all films are of European origin, ranging from 14% in Croatia to 50% in France.

- The highest proportion of EU27 films was found in TVOD catalogues in France (42%), followed by Germany (30%), Austria (29%), Italy (28%) and Spain (25%). The lowest shares were found in Croatia (3%), Malta (4%) and Romania (6%).
- US films accounted for more than 50% in all countries except France, Germany and Austria, where a higher proportion of national or EU non-national films lowered the proportion of US films slightly compared to other countries.
- Non-US/non-European films represented between 5% in Croatia and 16% in Bulgaria of all films available in TVOD catalogues.

TVOD - Origin of films by region of origin  
By country, in share of total



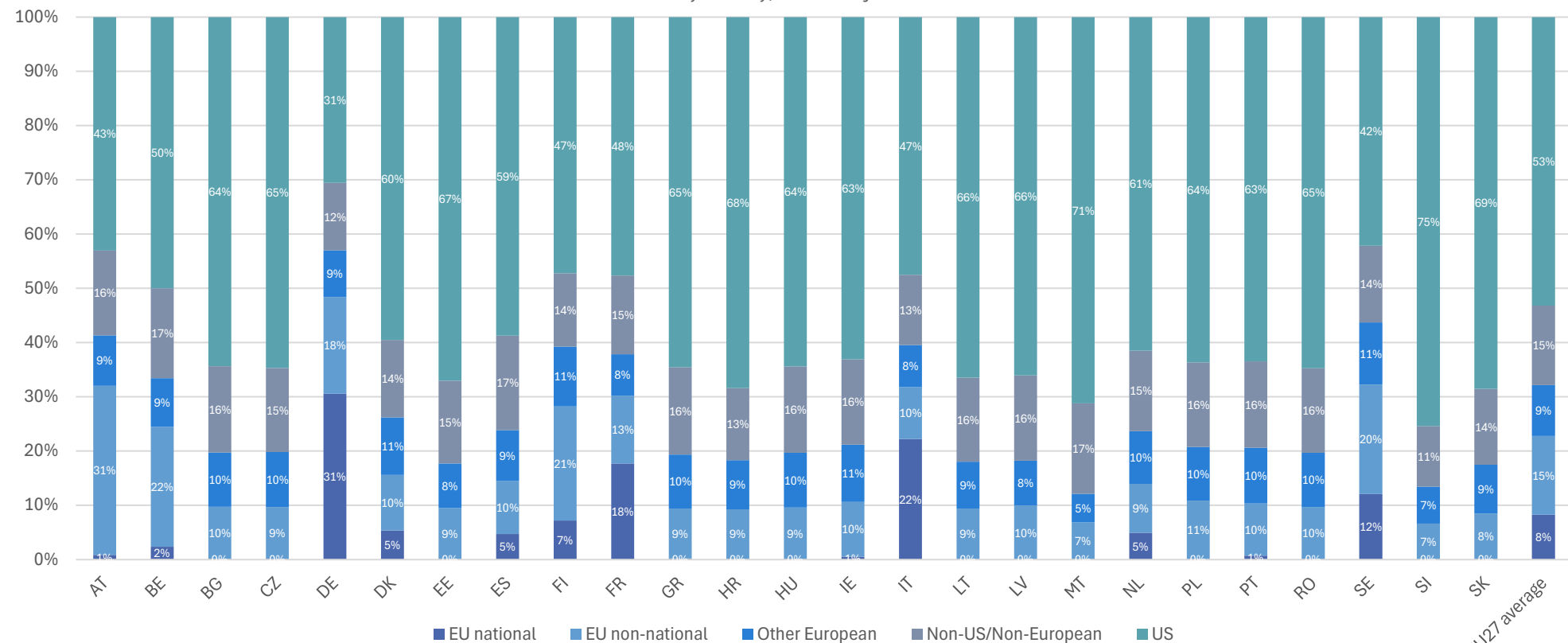
Source: JustWatch catalogue data

# C – Origin of works in VOD catalogues – Films on FOD services by country

On average, 32% of all films are of European origin, ranging from 12% in Malta to 57% in Germany

- The highest shares of EU27 films on FOD services were reached in Germany (48%), Sweden (32%), Austria (32%), Italy (32%) and France (30%), with broadcasters' FOD services boosting the share of national and EU non-national films.
- The lowest shares of EU27 films were found in Slovenia (7%), Malta (7%) and Slovakia (9%).
- The highest shares of EU non-national films were found in Austria (31%), Belgium (22%), Finland (21%) and Sweden (20%).

FOD - Origin of films by region of origin  
By country, in share of total



Source: JustWatch catalogue data

### Origin of works in VOD catalogues: TV seasons

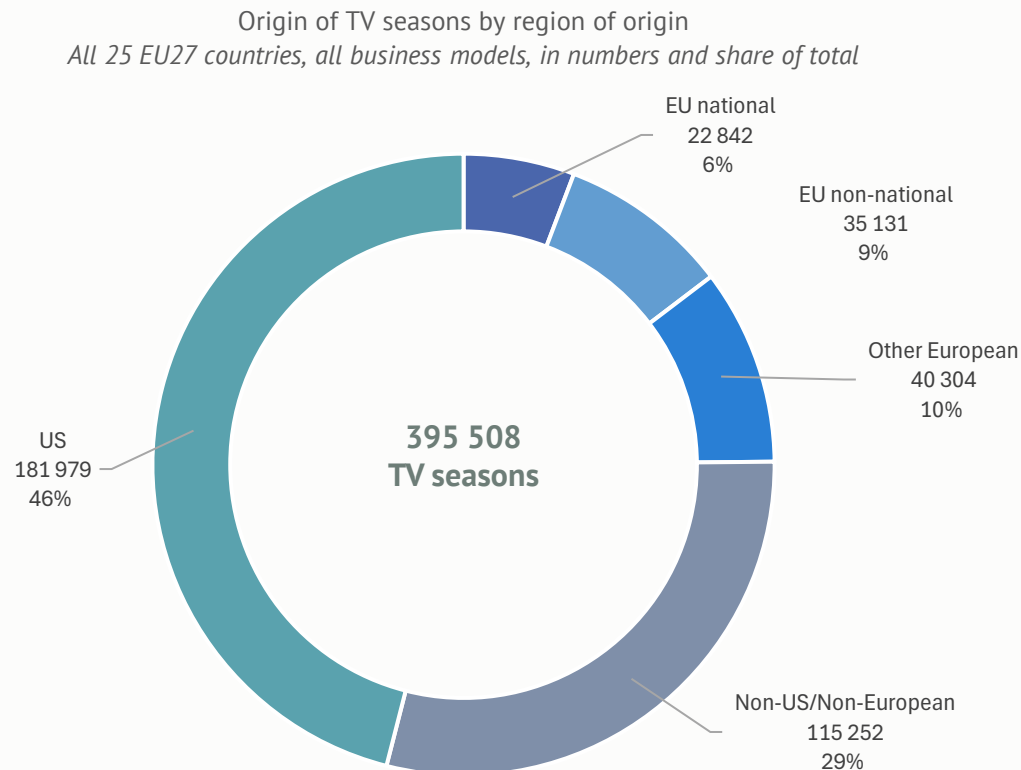
- This section deals with **presences of TV seasons**, the number of countries and catalogues in which the film was present is taken into account.
- For pan-European data, the number of countries and catalogues in which the TV season was present is taken into account.
- For country-level data, the number of catalogues in which the TV season was present in the country is taken into account.



## C – Origin of works in VOD catalogues – TV seasons

25% of all TV seasons are of European origin: 15 per cent were produced in the EU27, and 10 per cent were produced elsewhere in Europe.

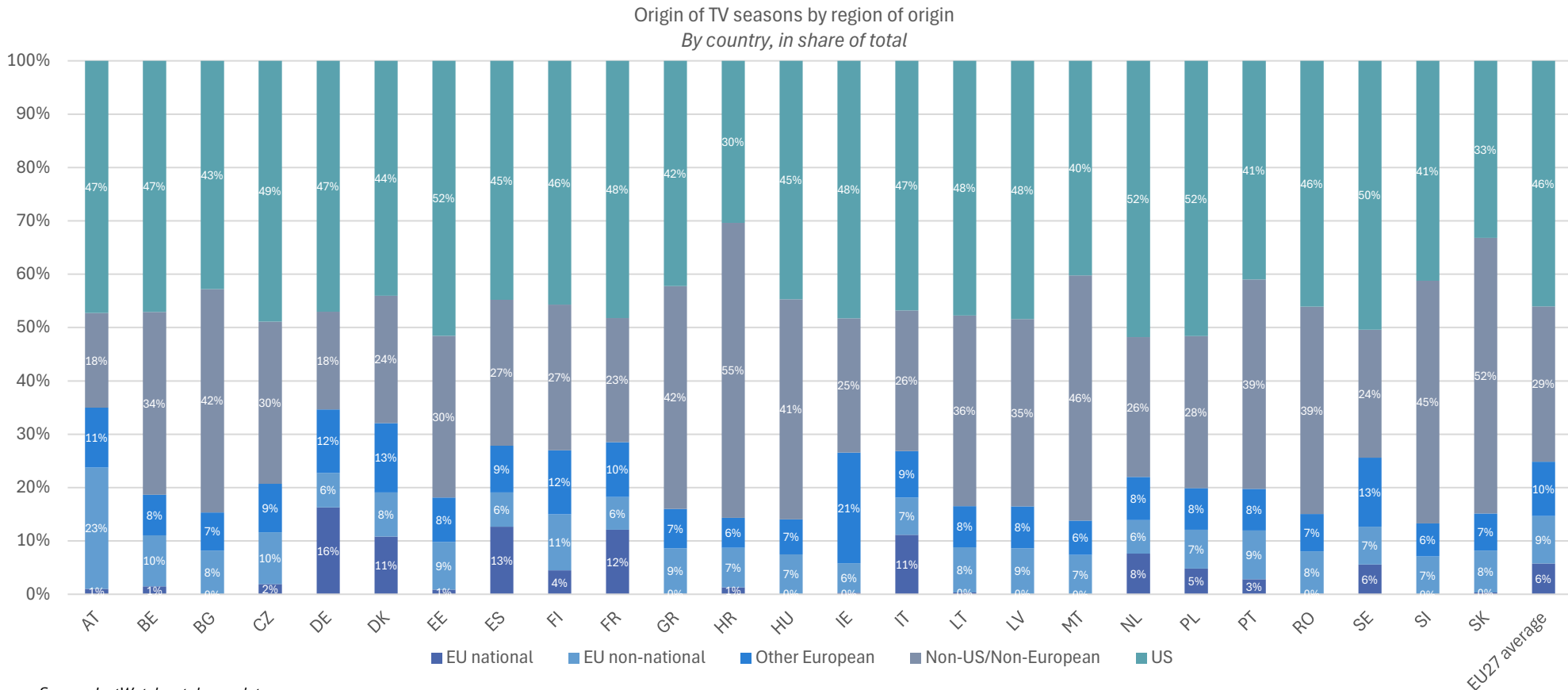
- EU27 TV seasons accounted for 15% of national TV seasons and 9% of EU non-national seasons. Additionally, 10% of all TV seasons were produced in other European countries, bringing the total share of European TV seasons to 25% across the 25 VOD countries.
- Non-US/non-European TV seasons accounted for a further 29% of the total, mainly in SVOD catalogues.
- US TV seasons represented 46% of all TV seasons, with over 181 000 TV seasons present in VOD catalogues.
- With 25% of all TV seasons, European TV seasons are behind both non-US/non-European and US TV seasons.



# C – Origin of works in VOD catalogues – TV seasons by country

On average, 25% of all TV seasons are of European origin, ranging from 13% in Slovenia to 35% in Austria.

- The countries with the highest proportion of EU27 TV seasons were Austria (24%), Germany (23%), Denmark (19%), Spain (19%), France (18%) and Italy (18%). These countries also had the highest shares of national TV seasons, except for Austria, which had the highest share of EU non-national TV seasons (23%), far above the EU average of 9%.
- The lowest shares of EU27 TV seasons were found in Ireland (6%), and in Slovenia, Malta and Hungary (7%). In these countries, the proportion of non/non-European TV seasons was above average (45–46%), except for Ireland which had the highest proportion of other European TV seasons (21%), many of which were produced in the United Kingdom.



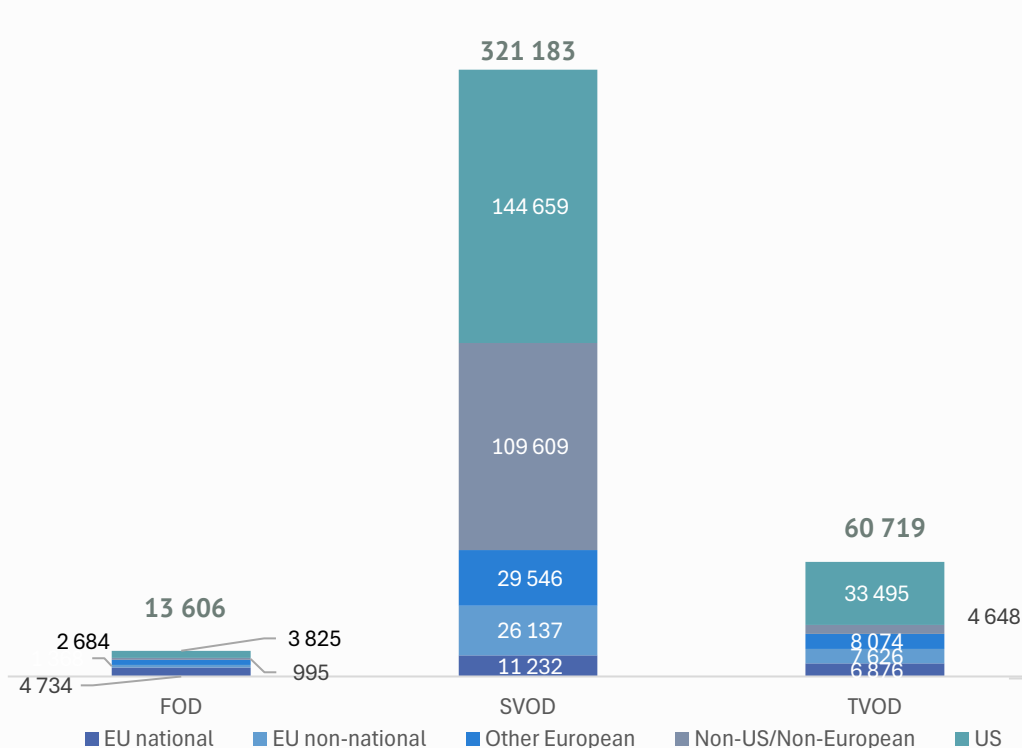
Source: JustWatch catalogue data

## C – Origin of works in VOD catalogues – TV seasons by business model

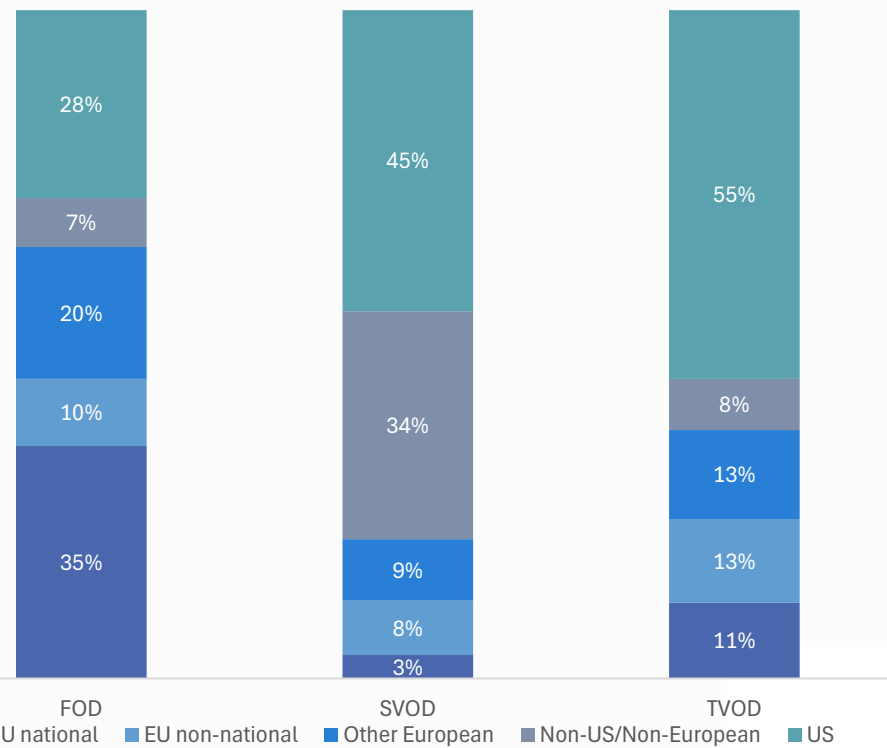
There were many more TV seasons on SVOD, with a more diverse range of regions of production.

- With over 321 000 TV seasons, SVOD had a much larger offering than TVOD and FOD.
- EU27 TV seasons represented only 11% of all seasons on SVOD, compared to 24% on TVOD and 45% on FOD.
- National TV seasons also accounted for a much higher proportion of catalogues on FOD than on SVOD, as FOD services tend to adapt their TV offerings more to their national audiences. They are also largely operated by national broadcasters, whereas global SVOD players tend to establish pan-European catalogues that are only marginally adapted to local audiences.
- The share of non-US/non-European TV seasons on SVOD was much higher than on TVOD and FOD, demonstrating the increased importance of TV content produced outside Europe and the USA in the offerings of global SVOD players.

Origin of TV seasons by region of origin by business model  
all 25 EU27 countries, in numbers



Origin of TV seasons by region of origin by business model  
all 25 EU27 countries, in shares of total

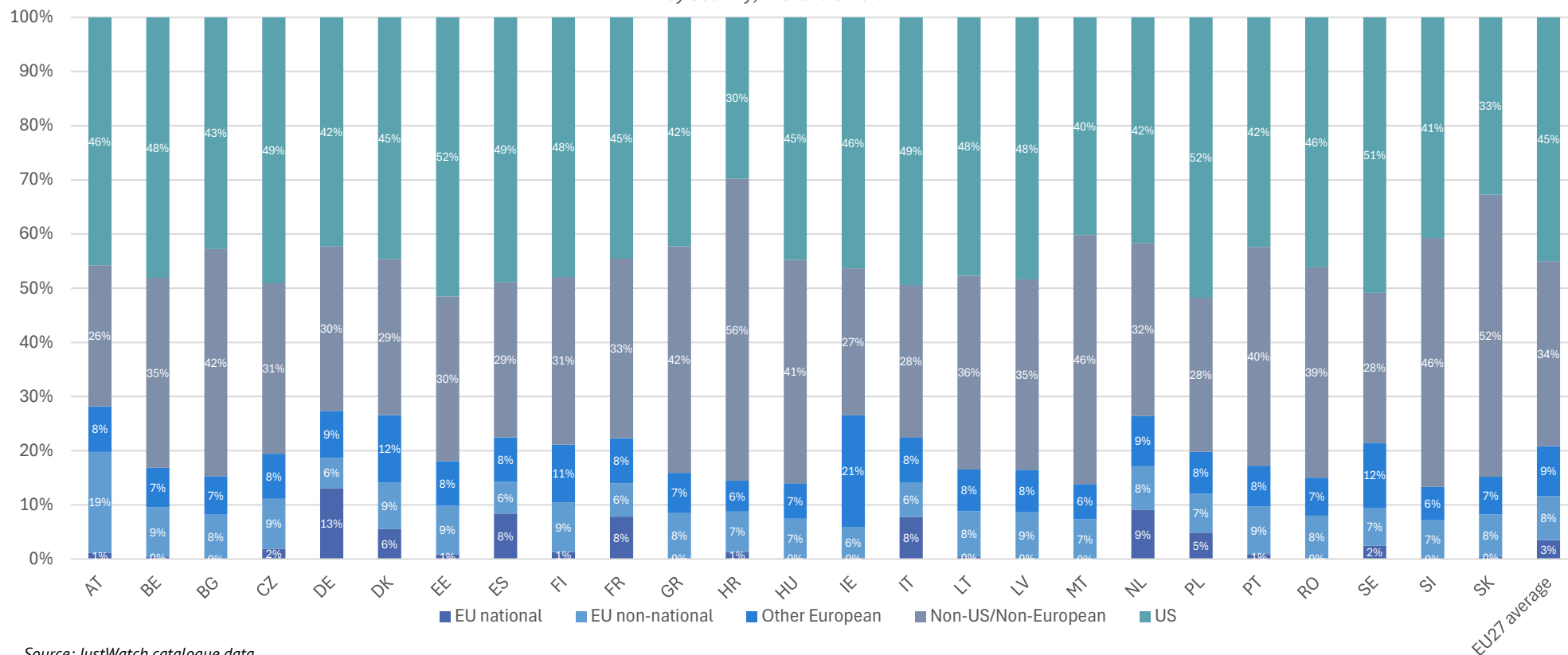


# C – Origin of works in VOD catalogues – TV seasons on SVOD services by country

On average, 21% of all TV seasons are of European origin, ranging from 13% in Slovenia to 28% in Austria.

- For EU27 TV seasons, the highest shares were found in Austria (20%), Germany (19%), the Netherlands (17%), and Spain, France, Italy, and Denmark (14%). The lowest shares were found in Ireland (6%), Slovenia, Malta and Hungary (7%).
- National TV seasons reached their highest shares in Germany (13%), the Netherlands (9%), Spain (8%), France (8%), Italy (8%) and Denmark (6%), while EU non-national TV seasons were most prevalent in Austria (19%), Czechia, Belgium, Finland, Estonia, Portugal, Denmark and Latvia (9%).
- Three countries had a share of US TV seasons above 50% (Poland, Estonia and Sweden), while eight countries had a share of non-US/non-European TV seasons above 40%.

SVOD - Origin of TV seasons by region of origin  
by country, in share of total

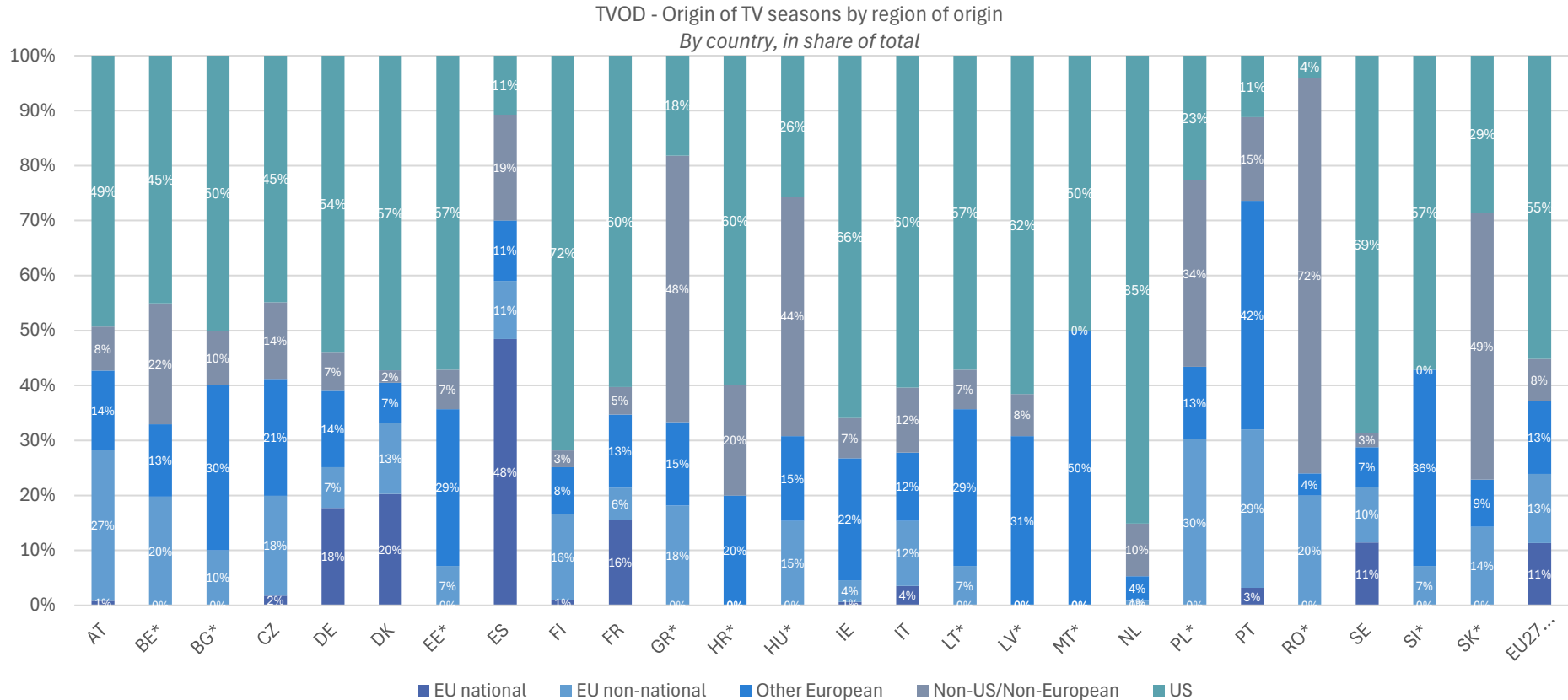


Source: JustWatch catalogue data

# C – Origin of works in VOD catalogues – TV seasons on TVOD services by country

On average, 37% of all TV seasons are of European origin, ranging from 5% in the Netherlands to 74% in Portugal.

- The number of TVOD services offering TV seasons is low, and in several countries, it is not representative.
- In the Netherlands, the majority of TV seasons offered on TVOD in the sample come from the Microsoft Film and TV catalogue, which has a low proportion of European TV seasons.



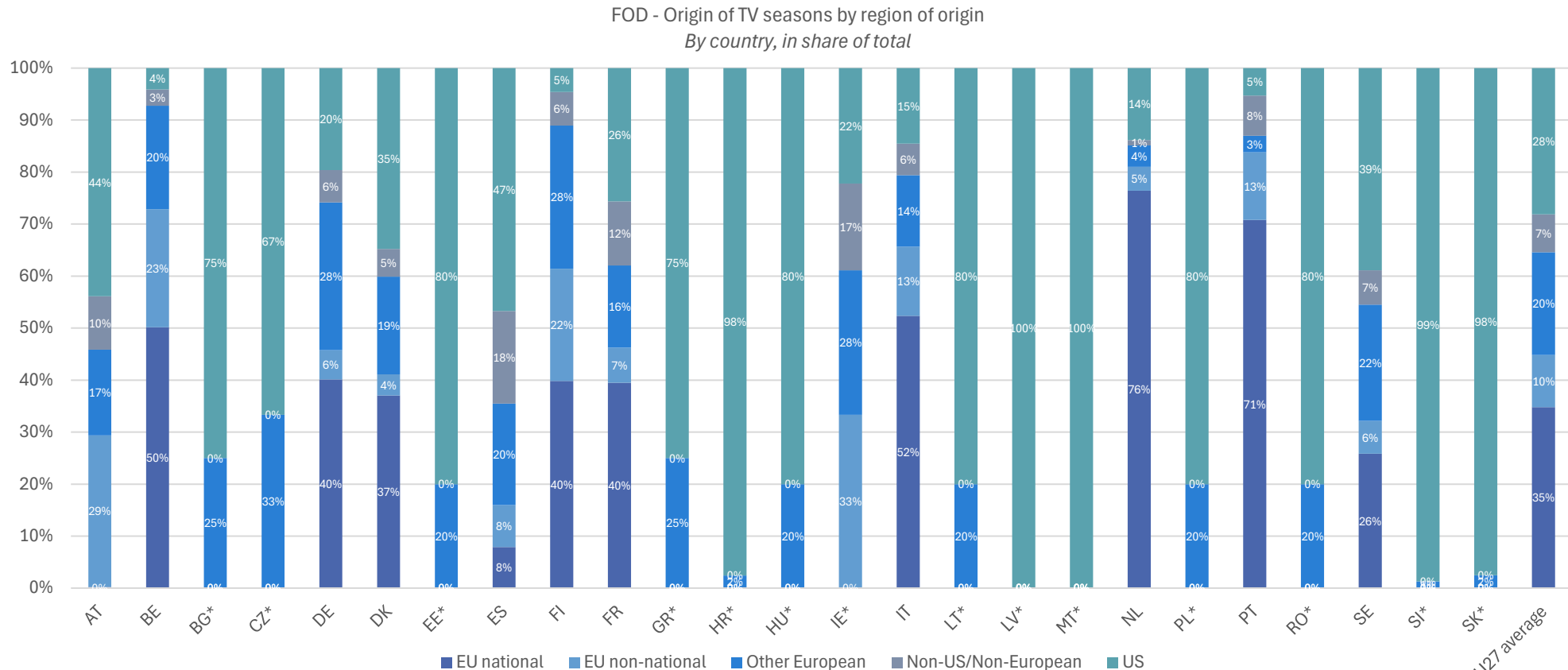
\* The number of total TV seasons on TVOD services in country is too low in TVOD sample to be representative (less than 100 presences).

# C – Origin of works in VOD catalogues – TV seasons on FOD services by country

On average, 65% of all TV seasons are of European origin, ranging from 35% in Spain to 93% in Belgium\*.

- In countries where national FOD services, which are often operated by national broadcasters, were included in the sample, the proportion of EU27 TV seasons, particularly national ones, is much higher.
- This was the case in Belgium (RTBF and VRTNU), Germany (Mediathek), Denmark (DR DK), Finland (Yle), France (France TV, M6+ and Arte), Italy (RaiPlay), the Netherlands (NPO Start) and Portugal (RTP Play).

\*Only countries with a sufficient presence of TV seasons were taken into account.



Source: JustWatch catalogue data

\* The number of total TV seasons available on FOD services in the country is too low in the FOD sample to be representative (less than 100 presences).

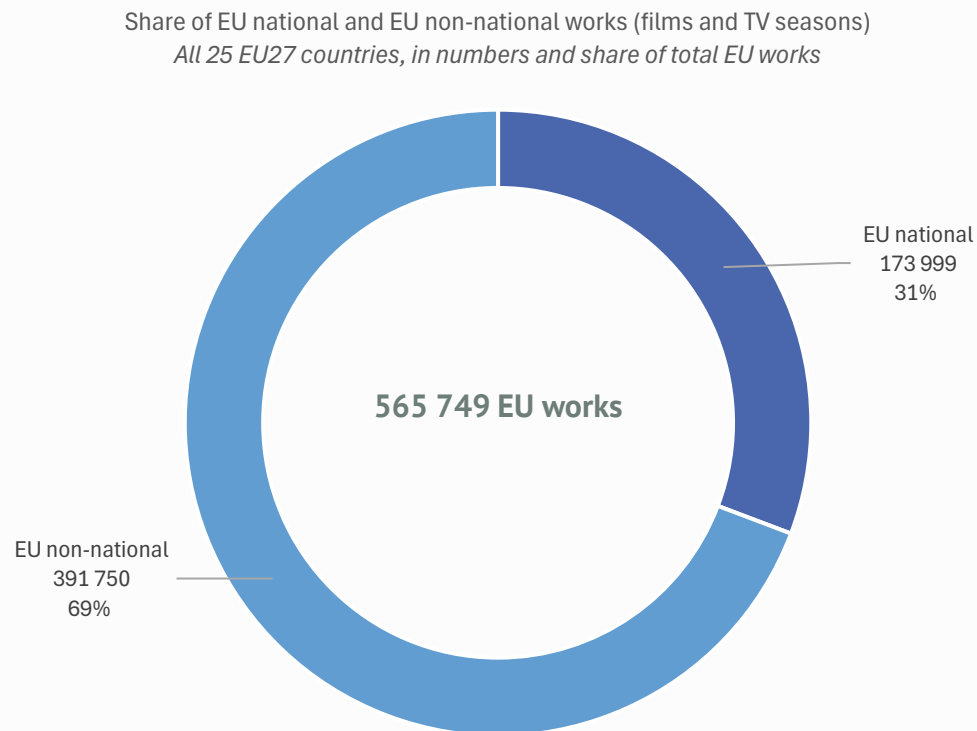
## D - Share of EU national and EU non-national works in VOD catalogues

- This section **only deals with EU27 works** (all works, films, TV seasons) and the **presences of works** are taken into account.

## D - Share of EU national and EU non-national works in VOD catalogues – All works

The majority of works in VOD catalogues of EU27 works are non-national.

- Of all the EU27 works in the VOD catalogues analysed across the 25 EU27 countries, 69% are of EU non-national origin.
- The composition of VOD catalogues with regard to EU27 works is impacted by the volume of audiovisual production (film and TV fiction) in a given country.
- In major film and TV production countries such as France, Germany, Italy and Spain, VOD services rely more on national productions for their EU27 content, whereas in countries with a lower volume of production, VOD services rely more on productions from other EU countries for their EU27 content.
- The presence of global SVOD players with catalogues in several or all EU countries also affects the proportion of EU non-national works, as these players tend to make EU27 original works available in all their catalogues or acquire licences at a pan-European or multi-country level.



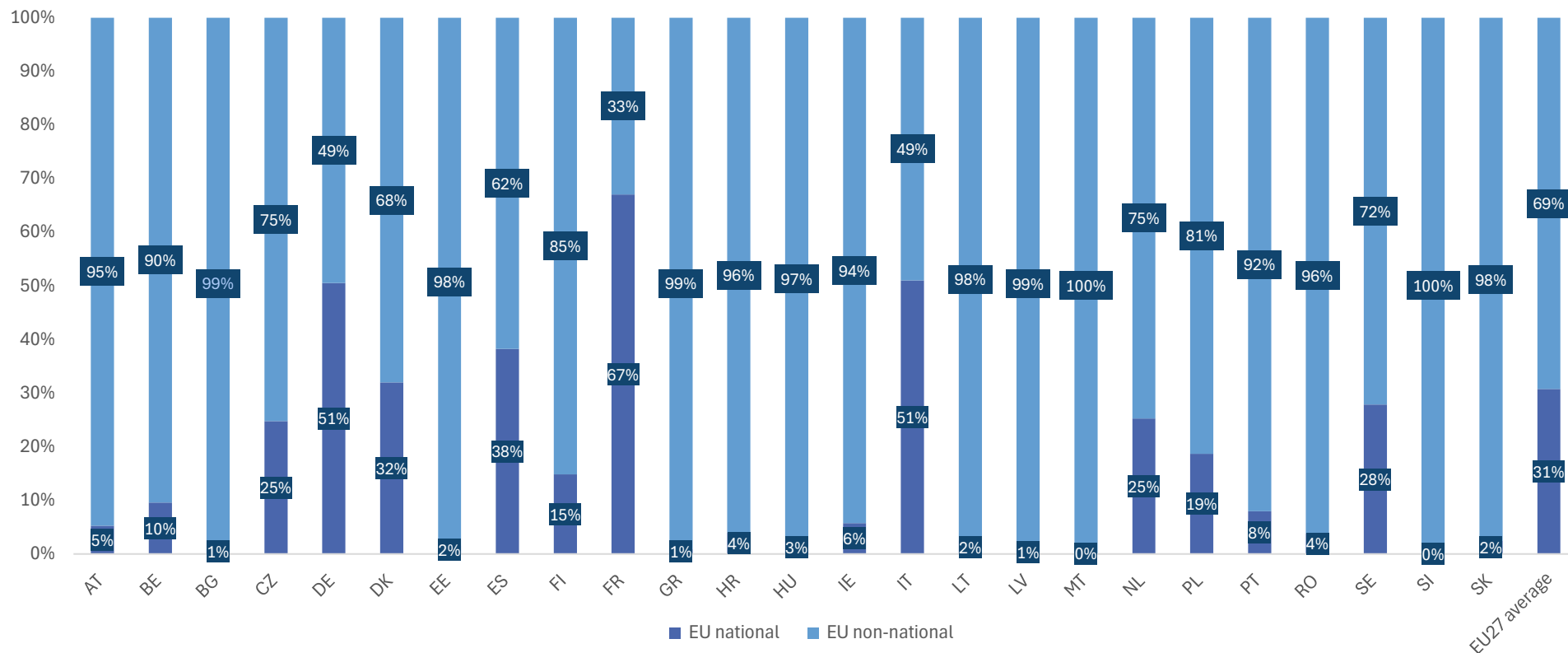


# D - Share of EU national and EU non-national works in VOD catalogues by country – All works

The situation for EU27 works on VOD is heterogeneous, ranging from a share of 0.1% of national works in Slovenia and Malta to 67% in France.

- Three major film and TV production countries (France, Germany and Italy) had a share over 50% of national works of EU works in their catalogues, while fifteen countries had less than 10% of national works in their EU works available (Belgium, Portugal, Ireland, Austria, Croatia, Romania, Hungary, Lithuania, Slovakia, Estonia, Bulgaria, Greece, Latvia, Malta and Slovenia).
- Spain and Denmark had shares of national works out of EU works of 38% and 32% respectively, with strong national audiovisual production sectors from which VOD services can source works for their catalogues (original productions/licensing).

Share of EU national and EU non-national works (films and TV seasons)  
By country, in numbers and share of total EU works



Source: JustWatch catalogue data

## Share of EU national and EU non-national films

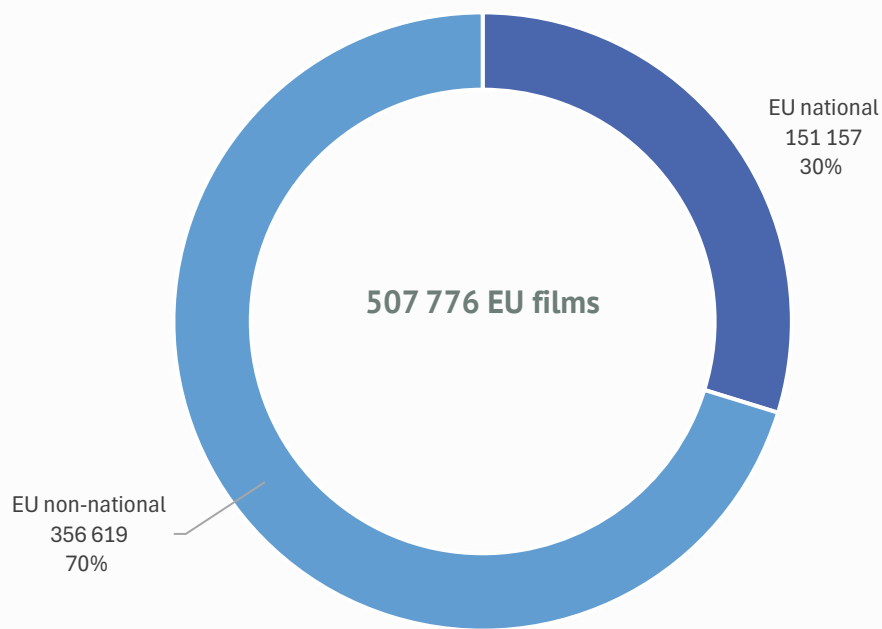
- This section **only deals with EU27 films** and the **presences of films** are taken into account.

## D - Share of EU national and EU non-national works in VOD catalogues - Films

Seven out of 10 EU films in VOD catalogues are of non-national origin.

- Of the more than 507 000 EU films in VOD catalogues, non-national EU films accounted for 70% of all EU films available to Europeans.
- Countries with larger film production sectors had a higher proportion of national films than countries with smaller sectors.

Share of EU national and EU non-national films  
All 25 EU27 countries, all business models, in numbers and share of total EU films

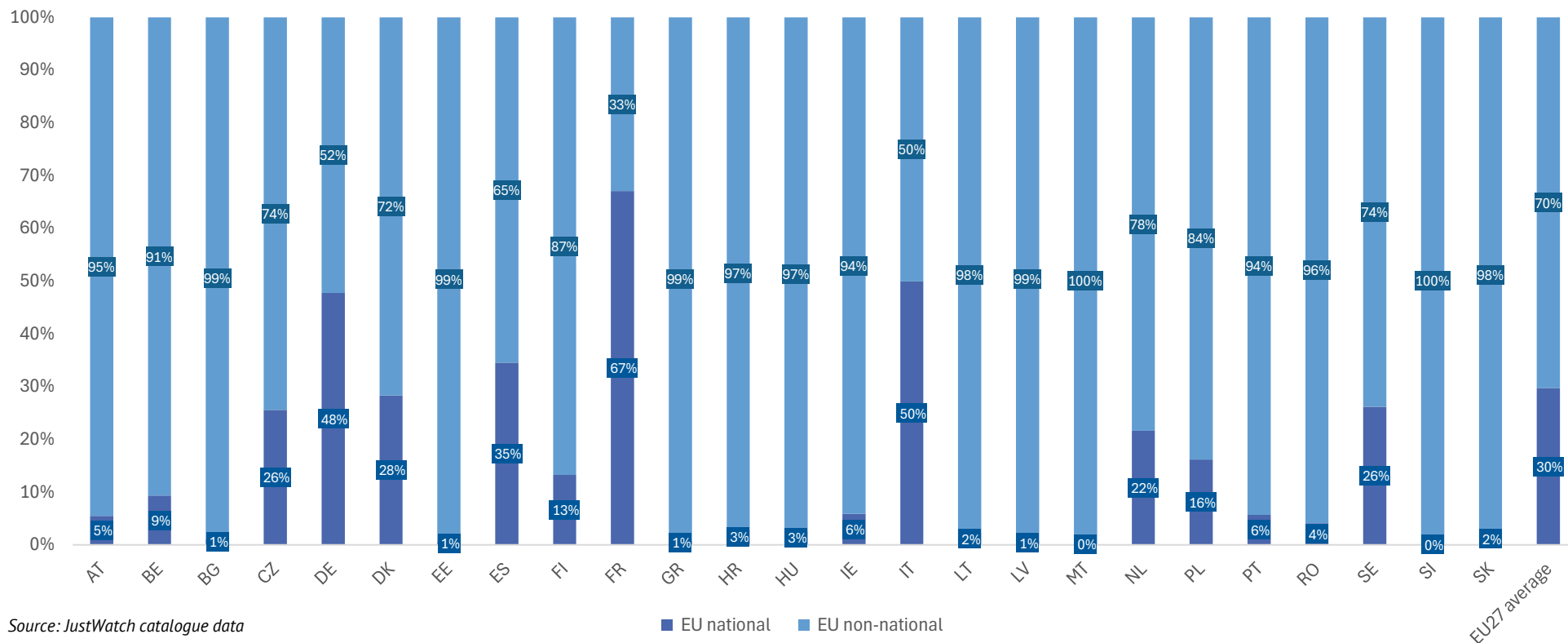


# D - Share of EU national and EU non-national works in VOD catalogues – Films by country

National films represented the majority of EU films in only two countries: France (67%) and Italy (50%).

- Only four countries had a share of national films out of EU27 films above the EU27 average of 30%: France (67%), Italy (50%), Germany (48%) and Spain (35%).
- Fifteen countries had a share of national films below 10%: Slovenia, Malta, Estonia, Latvia, Greece, Bulgaria, Slovakia, Lithuania, Hungary, Croatia, Romania, Austria, Portugal, Ireland and Belgium.
- Six countries with mid-volume production industries had shares of national films between 13% (Finland) and 28% (Denmark) and were heavily impacted by shares in the four major production countries.

Share of EU national and EU non-national films  
By country, in numbers and share of total



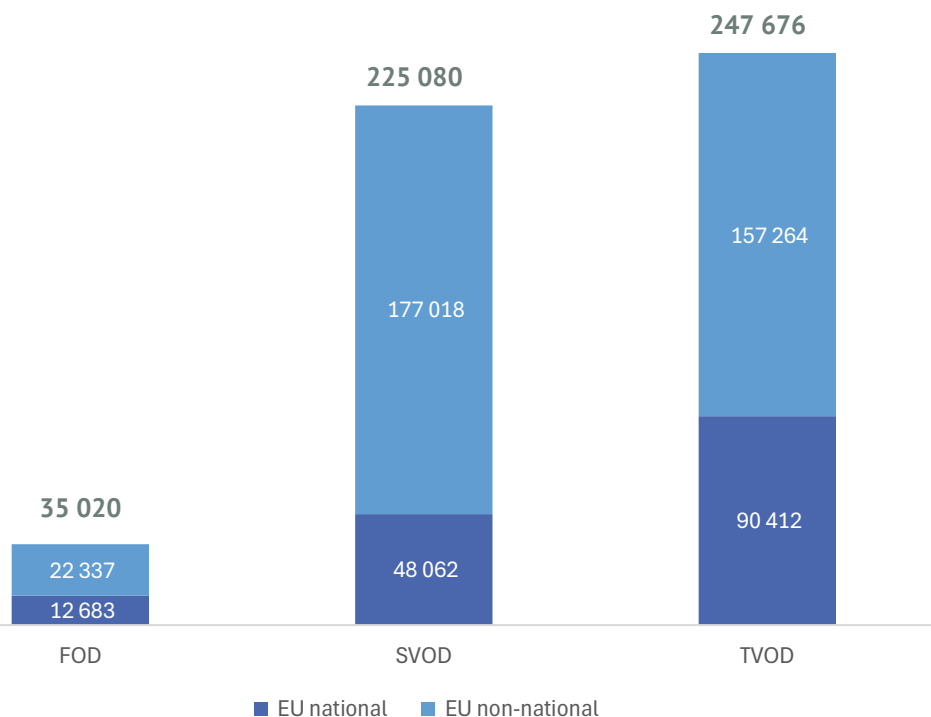
Source: JustWatch catalogue data

## D - Share of EU national and EU non-national works in VOD catalogues – Films by business model

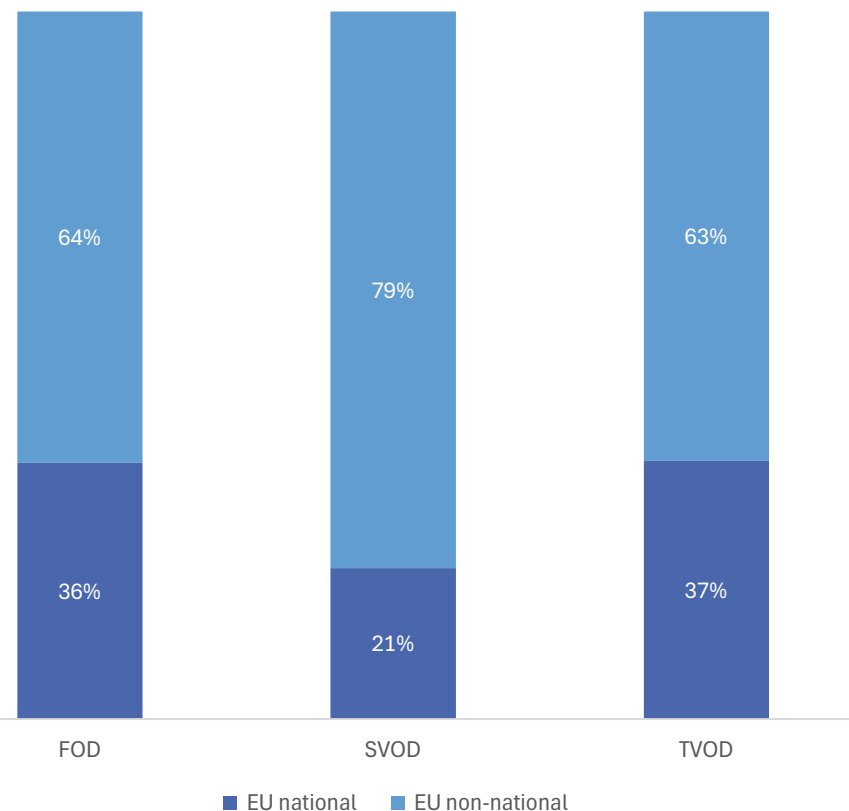
There was a higher proportion of EU non-national films in SVOD catalogues than in TVOD and FOD catalogues.

- With respective shares of 37% and 36%, TVOD and FOD services offered a higher proportion of EU national films than SVOD services.
- On the other hand, SVOD services, which were composed in the VOD sample of global and national players, relied much more on EU non-national films for their EU27 film offering, with these films accounting for 79% of the total.
- In terms of volume, TVOD services offered the largest number of EU27 films, with over 247 000 films. This was followed by SVOD services with 225 000 films and, well behind them, FOD services with 35 020 films.

Share of EU national and EU non-national films by business model  
All 25 EU27 countries, in numbers



Share of EU national and EU non-national films by business model  
All 25 EU27 countries, in share of total



Source: JustWatch catalogue data

# D - Share of EU national and EU non-national works in VOD catalogues – Films on SVOD services by country

On average, national films account for 21% of EU films in SVOD catalogues, ranging from 0.1% in Malta to 57% in France.

- Unsurprisingly, national films account for a larger proportion of films in countries with high film production volumes, such as France (57%), Italy (44%), Germany (35%) and Spain (35%).
- Fifteen countries with smaller film production industries had shares of national films below the 10% threshold: Finland, Austria, Romania, Portugal, Hungary, Lithuania, Croatia, Ireland, Slovakia, Bulgaria, Latvia, Estonia, Greece, Slovenia and Malta. In these countries, the VOD sample mostly includes global SVOD services, which further impacts the share of national films.



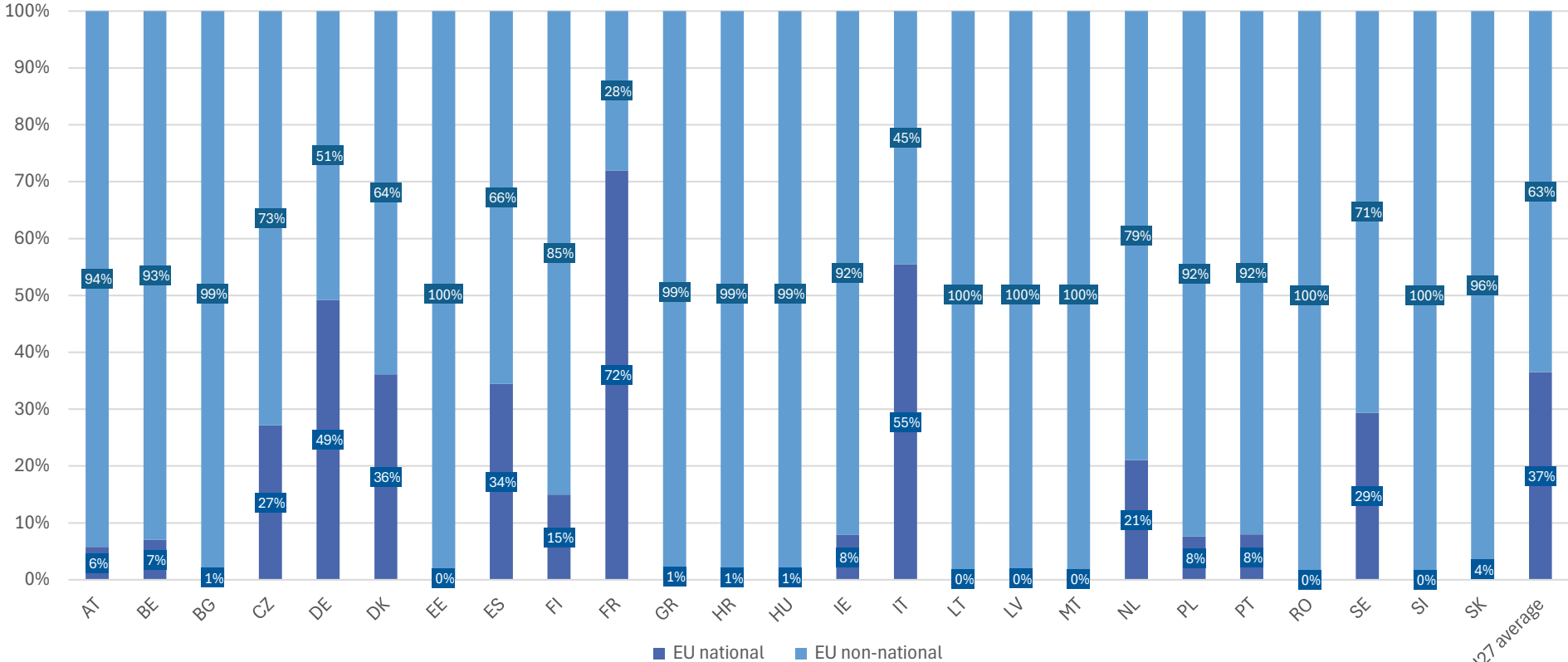
Source: JustWatch catalogue data

# D - Share of EU national and EU non-national works in VOD catalogues – Films on TVOD services by country

On average, national films account for 37% of TVOD catalogues' EU film offerings, ranging from 0% in Slovenia and Romania to 72% in France.

- The share of national films was above or close to 50% in France, Italy and Germany, indicating the use of TVOD services for the distribution of national theatrical productions.
- In the sixteen countries without national TVOD services included in the VOD sample, the share of national films was below 10%.
- In countries such as Finland, the Netherlands, Czechia, Sweden, Spain and Denmark, where national film production is well developed, TVOD can offer a wide selection of national films and national films ranged from 15% to 36% of EU films.

TVOD - Share of EU national and EU non-national films  
By country, in numbers and share of total



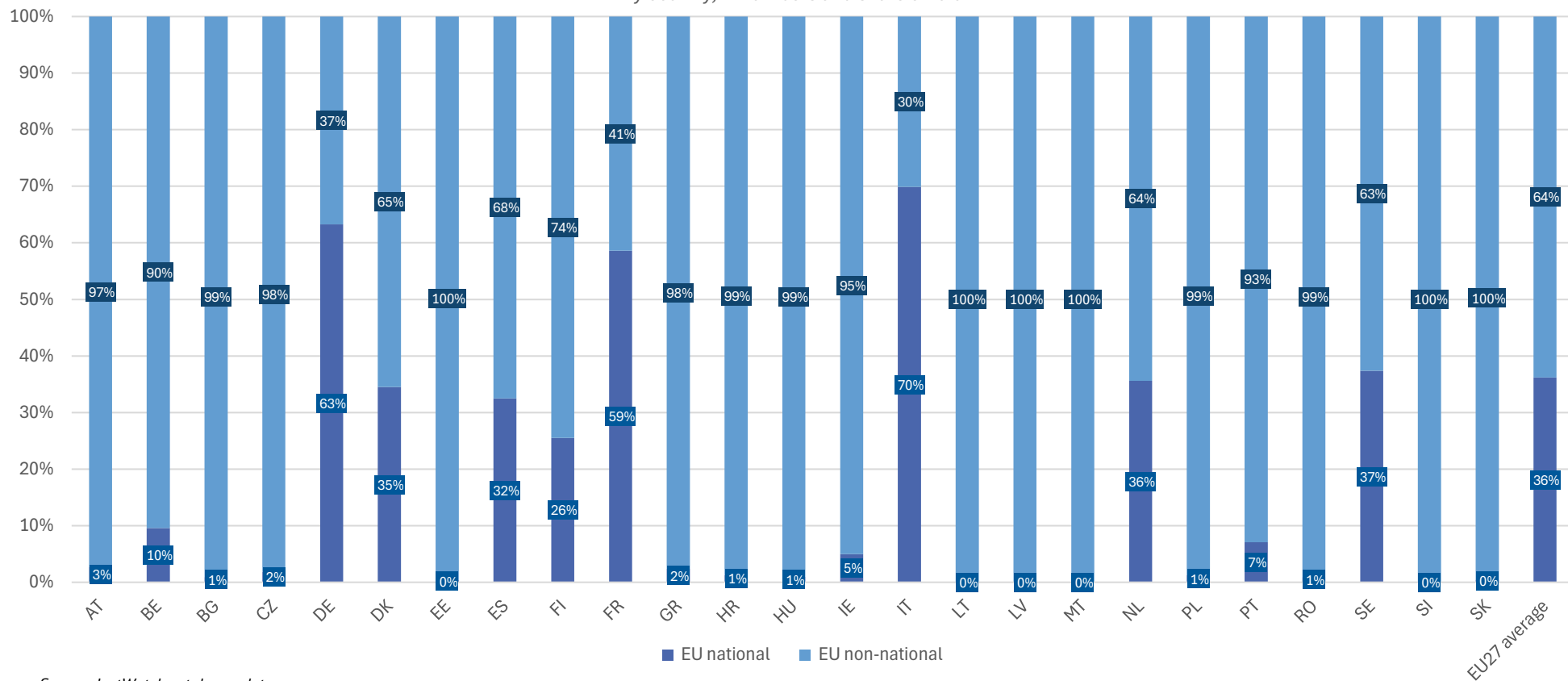
Source: JustWatch catalogue data

# D - Share of EU national and EU non-national works in VOD catalogues – Films on FOD services by country

On average, national films accounted for 36% of EU films, ranging from 0% in four countries (Latvia, Lithuania, Malta and Slovenia) to 70% in Italy.

- In the ten countries where FOD services are operated by public and private broadcasters (Italy, Germany, France, Sweden, the Netherlands, Denmark, Spain, Finland and Belgium), national films accounted for between 7% and 70% of EU27 films.
- In the other 15 countries with FOD services operated by global AVOD providers and without FOD services of broadcasters in the sample, the selection of EU27 films mainly comprises non-national EU films.

FOD - Share of EU national and EU non-national films  
By country, in numbers and share of total



Source: JustWatch catalogue data



## Share of EU national and EU non-national TV seasons

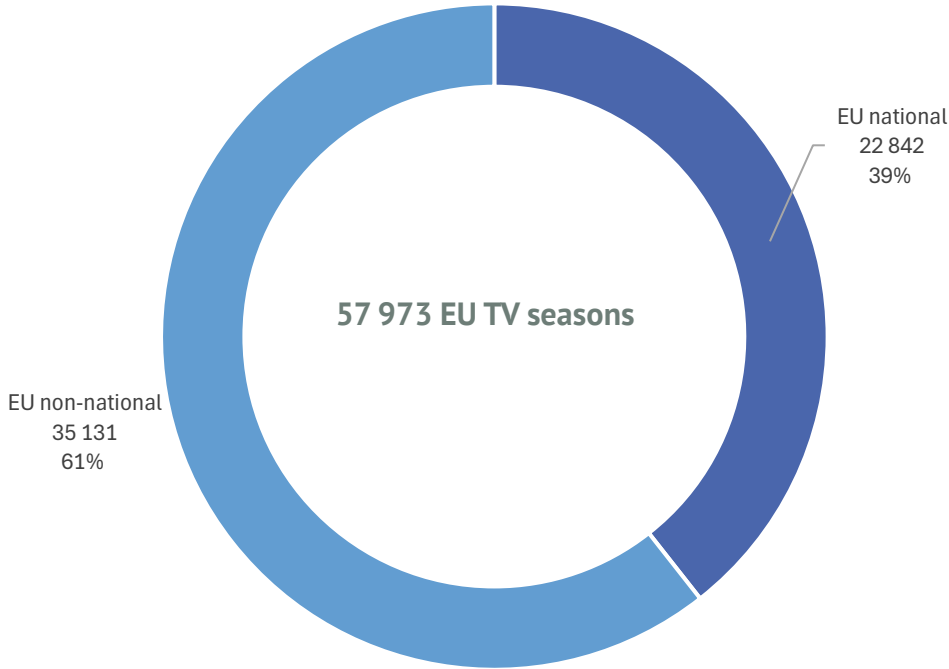
- This section **only deals with EU27 TV seasons** and the **presences of TV seasons** are taken into account.

# D - Share of EU national and EU non-national works in VOD catalogues – TV seasons

A higher share of EU27 national TV seasons in VOD catalogues than for films, with 39% of all EU TV seasons available in VOD catalogues being of national origin.

- EU national TV seasons accounted for 39% of all EU27 TV seasons available on VOD services in 25 countries – a higher proportion than national films, which accounted for 30% of all EU27 films.

Share of EU national and EU non-national TV seasons  
All 25 EU27 countries, in numbers and share of total



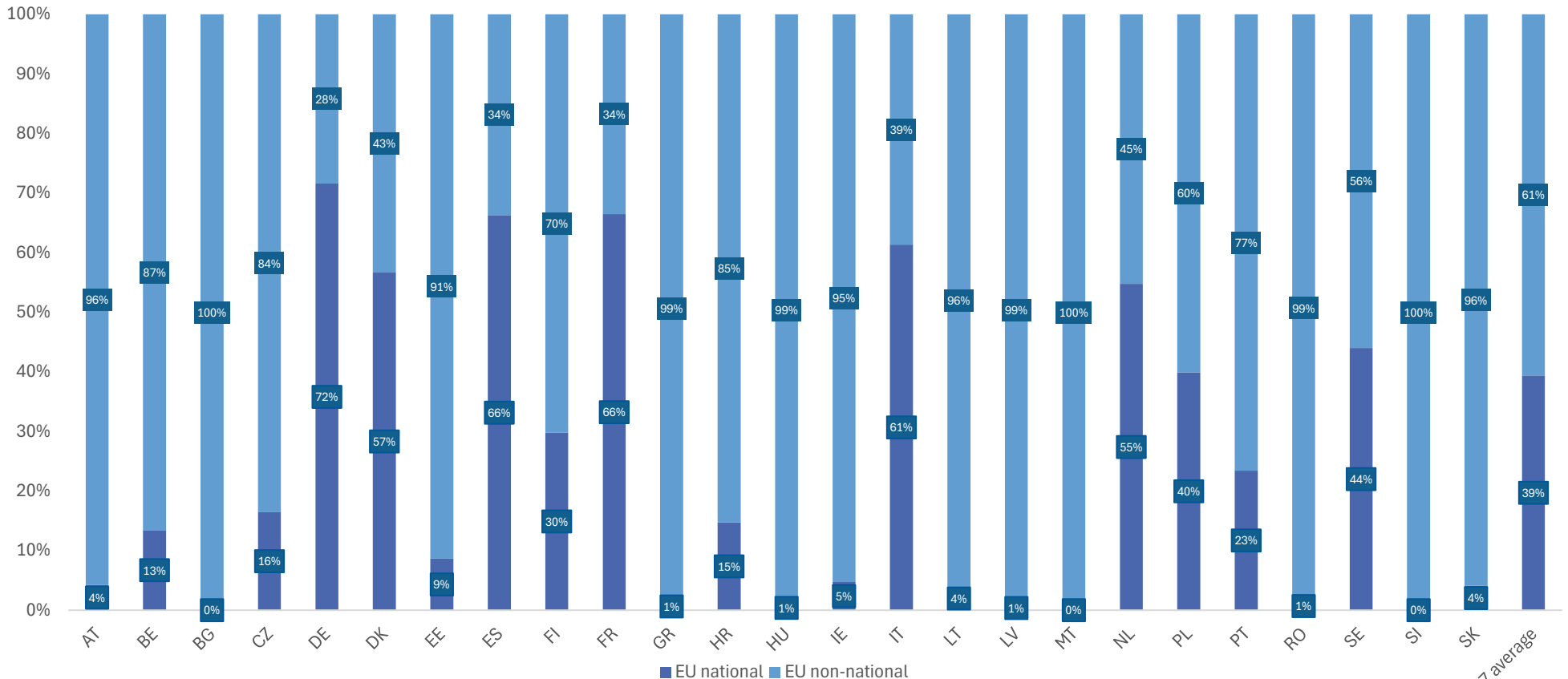
Source: JustWatch catalogue data

# D - Share of EU national and EU non-national works in VOD catalogues – TV seasons by country

On average, 39% of EU TV seasons were national, ranging from 0% in Slovenia, Malta and Bulgaria to 72% in Germany.

- Six countries had more national TV seasons than non-national TV seasons in their VOD offerings: Germany (72%), France (66%), Spain (66%), Italy (61%), Denmark (57%) and the Netherlands (55%). These countries also have a strong TV fiction production industry.
- In contrast, twelve countries (Estonia, Ireland, Austria, Slovakia, Lithuania, Romania, Greece, Hungary, Latvia, Bulgaria, Malta and Slovenia) had shares of national TV seasons below 10%, meaning that the EU27 TV offering was mostly composed of non-national TV seasons.

Share of EU national and EU non-national TV seasons  
By country, in numbers and share of total



Source: JustWatch catalogue data

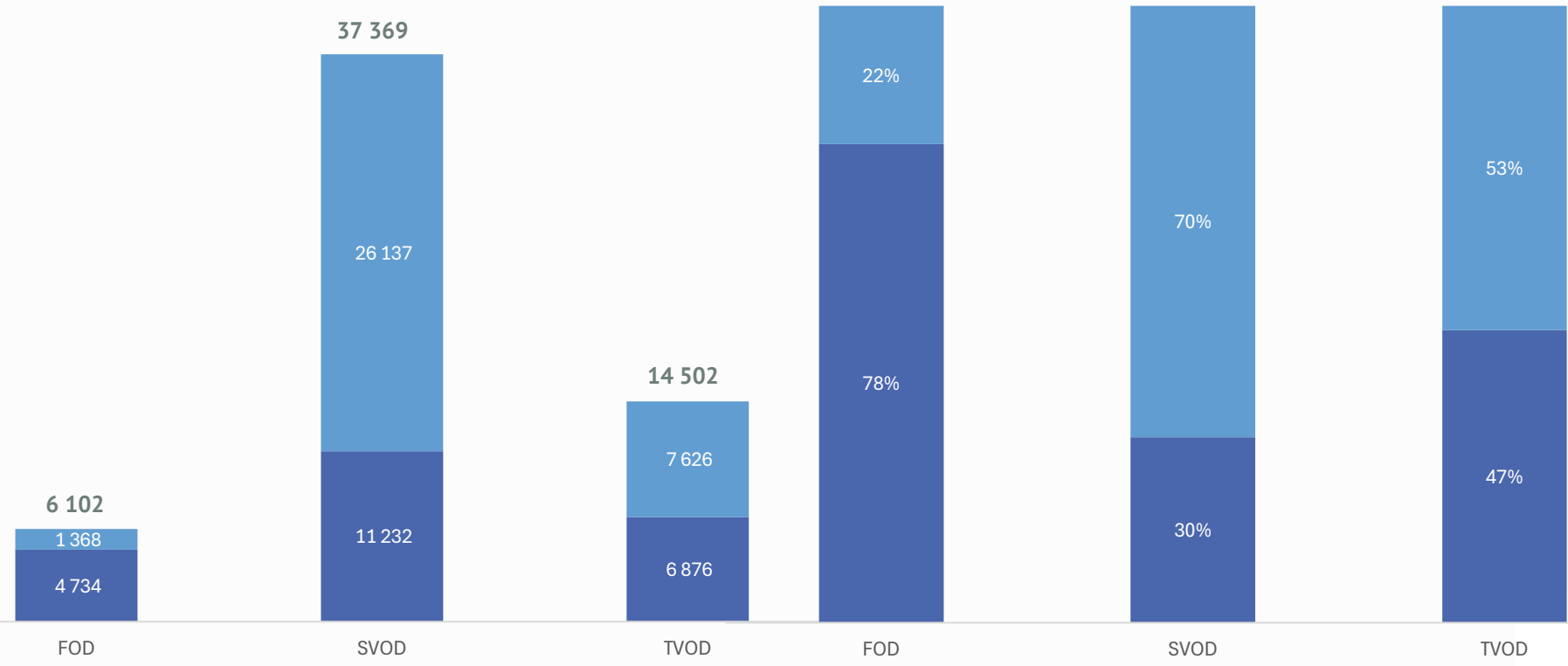
# D - Share of EU national and EU non-national works in VOD catalogues – TV seasons by business model

The EU TV seasons offering is mostly non-national on SVOD, mixed on TVOD and mostly national on FOD services but with a much larger offer on SVOD services.

- On SVOD services, global players such as Netflix, Amazon and Max tend to circulate EU27 TV seasons in their European catalogues. This results in EU27 TV catalogues that are mainly composed of non-national TV seasons.
- FOD services' EU27 TV season offerings were mostly national. The main reason for this was the presence of FOD services from national broadcasters in several countries, as these broadcasters made their national content available for on-demand viewing on their replay services.
- On TVOD, EU27 TV seasons were almost equally split between national and non-national TV seasons, with a slight advantage to the latter.

Share of EU national and EU non-national TV seasons by business model  
All 25 EU27 countries, in numbers

Share of EU national and EU non-national TV seasons by business model  
All 25 EU27 countries, in share of total



Source: JustWatch catalogue data

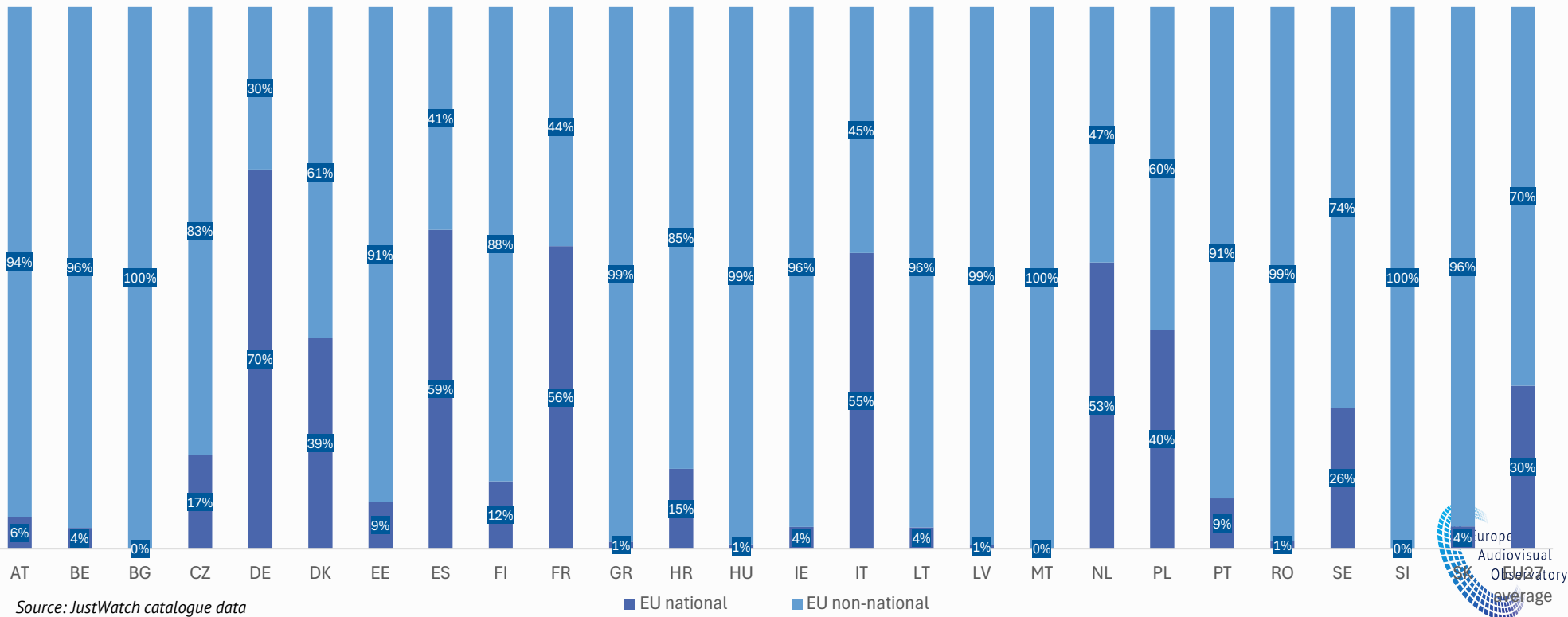
■ EU national ■ EU non-national

# D - Share of EU national and EU non-national works in VOD catalogues – TV seasons on SVOD services by country

On average, national TV seasons represented 30% of all EU27 TV seasons, ranging from 0% in Malta, Bulgaria and Slovenia to 70% in Germany.

- In five countries, national TV seasons accounted for the majority of the TV seasons offered by the EU27 on SVOD. This was the case in Germany (70%), Spain (59%), France (56%), Italy (55%) and the Netherlands (53%).
- In fourteen countries, the share of national TV seasons ranged from 0% to 9% (in Estonia and Portugal). In these countries, global SVOD services relied more on non-national TV seasons for their EU27 TV offerings.

SVOD - Share of EU national and EU non-national TV seasons by country, in numbers and share of total



Source: JustWatch catalogue data

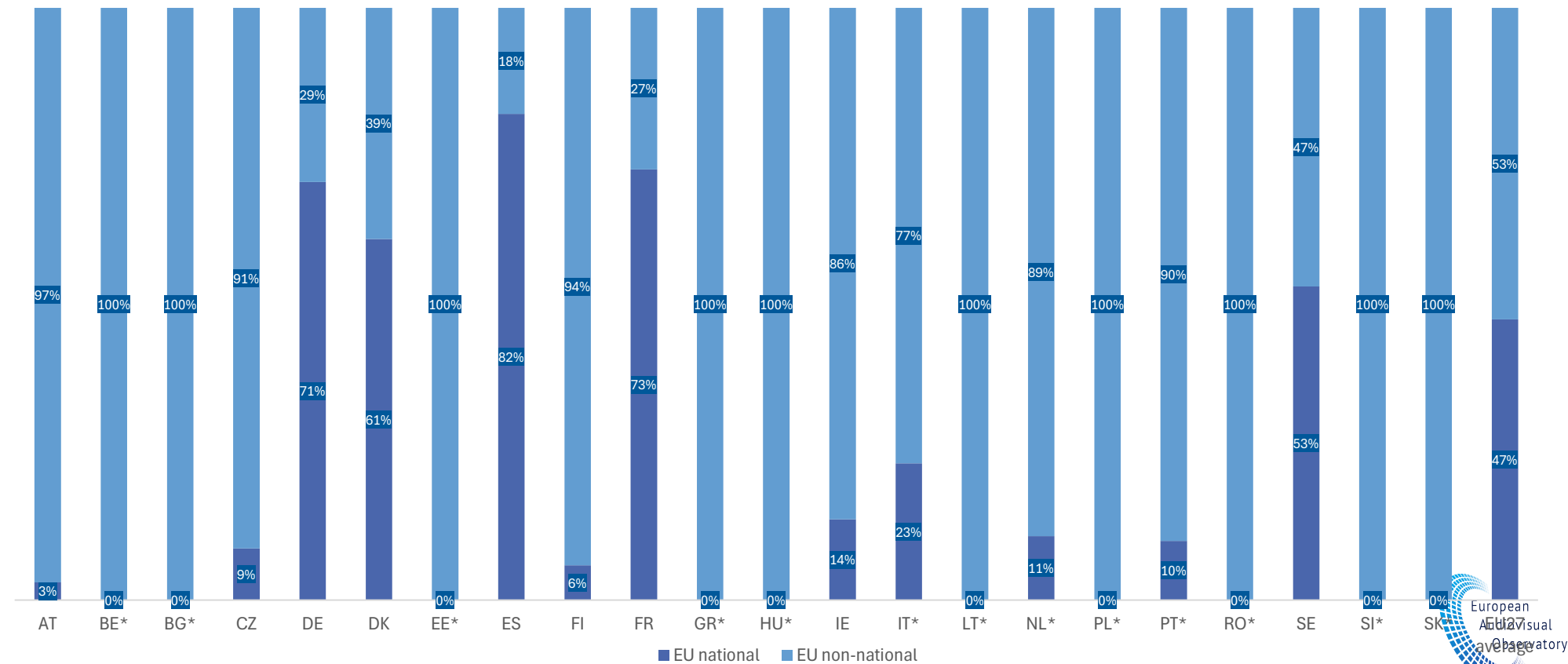


# D - Share of EU national and EU non-national works in VOD catalogues – TV seasons on TVOD services by country

On average, 47% of EU TV seasons in the VOD sample were national, ranging from 3% in Austria to 82% in Spain.

- In countries with national TVOD services, the EU27 TV seasons offering was mainly national, with shares ranging from 53% in Sweden to 82% in Spain. This was the case in Germany (Magenta TV and Maxdome), Denmark and Sweden (SF Anytime and Blockbuster), Spain (Filmin, Atresplayer and Mitele), and France (Canal VOD, Orange VOD, UniversCiné and Bbox).
- In all other countries, TVOD services were either operated by global players or did not offer a significant number of EU27 TV seasons.

TVOD - Share of EU national and EU non-national TV seasons  
by country, in numbers and share of total



Source: JustWatch catalogue data

\* The number of total EU TV seasons on TVOD services in country is too low in TVOD sample to be representative (less than 100 presences).

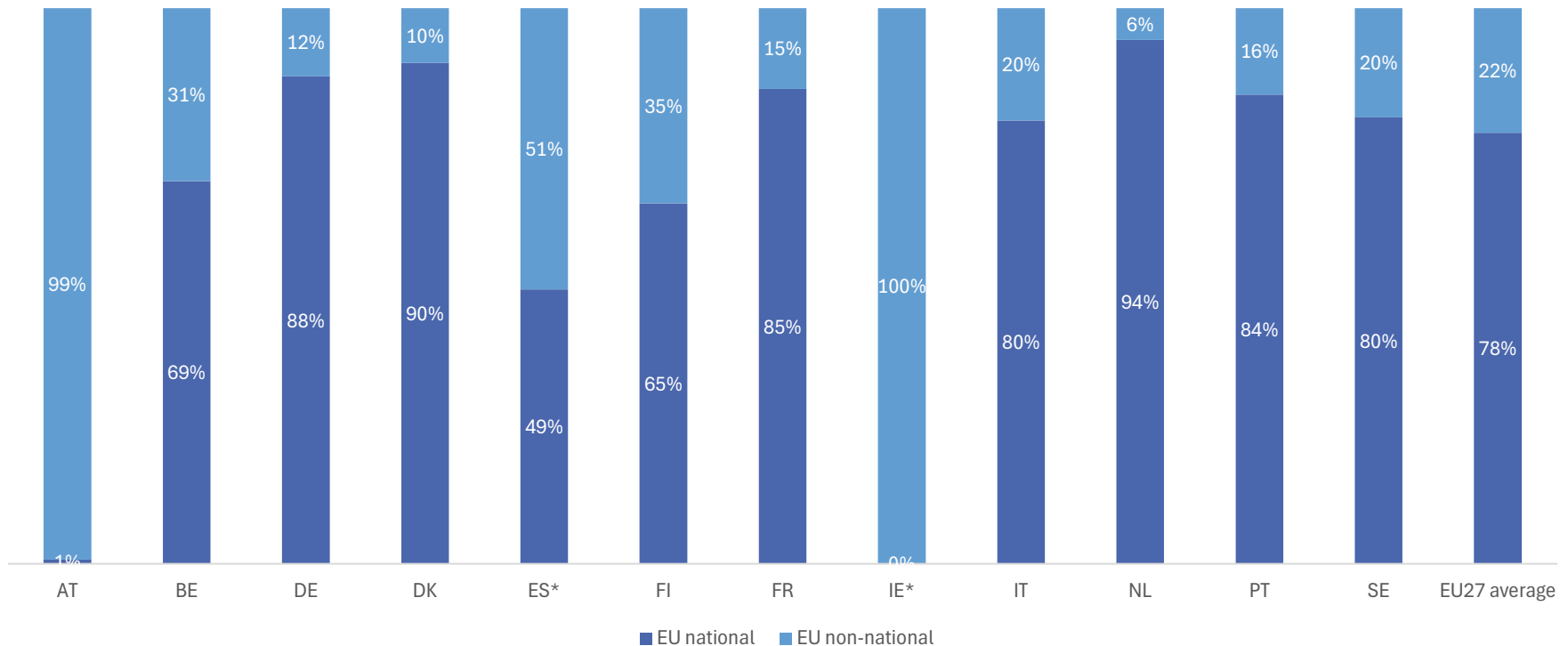


# D - Share of EU national and EU non-national works in VOD catalogues – TV seasons on FOD services by country

On average, 79% of all EU TV seasons were of national origin, ranging from 1% in Austria to 94% in the Netherlands.

- The high proportion of national TV seasons in countries where EU27 TV seasons were available on FOD services can be explained by the presence of national broadcasters that mostly carry national TV content in their FOD catalogues.
- In Ireland and Spain, the number of EU TV seasons available on FOD was below 100, making them not representative.
- The absence of 13 countries from the graph is due to the absence of EU27 TV seasons in the catalogues of the two FOD services that were part of the sample for these countries.

FOD - Share of EU national and EU non-national TV seasons  
By country, in numbers and share of total



\* The number of total EU27 TV seasons on FOD services in country is too low in FOD sample to be representative (less than 100 presences).

## **Annex**

### **Number of VOD catalogues by country and business model**



# Number of VOD services in the sample by country and business model

All works  
Number of VOD catalogues by country and business model

Films  
Number of VOD catalogues by country and business model

TV seasons  
Number of VOD catalogues by country and business model

Country	FoD	SVoD	TVoD	Total	Country	FoD	SVoD	TVoD	Total	Country	FoD	SVoD	TVoD	Total
AT	25	85	22	132	AT	15	58	13	86	AT	10	27	9	46
BE	10	49	11	70	BE	7	33	6	46	BE	3	16	5	24
BG	5	36	5	46	BG	4	24	3	31	BG	1	12	2	15
CZ	5	40	11	56	CZ	4	26	6	36	CZ	1	14	5	20
DE	52	116	40	208	DE	35	77	23	135	DE	17	39	17	73
DK	9	52	15	76	DK	6	33	8	47	DK	3	19	7	29
EE	5	31	7	43	EE	4	21	4	29	EE	1	10	3	14
ES	10	66	18	94	ES	8	44	10	62	ES	2	22	8	32
FI	13	52	17	82	FI	9	33	9	51	FI	4	19	8	31
FR	18	72	31	121	FR	12	51	17	80	FR	6	21	14	41
GR	5	30	9	44	GR	4	20	5	29	GR	1	10	4	15
HR	8	47	5	60	HR	6	31	3	40	HR	2	16	2	20
HU	5	37	11	53	HU	4	24	6	34	HU	1	13	5	19
IE	8	54	15	77	IE	6	36	8	50	IE	2	18	7	27
IT	12	73	12	97	IT	9	51	7	67	IT	3	22	5	30
LT	5	32	7	44	LT	4	22	4	30	LT	1	10	3	14
LV	5	31	7	43	LV	4	21	4	29	LV	1	10	3	14
MT	6	30	6	42	MT	4	18	4	26	MT	2	12	2	16
NL	8	61	19	88	NL	5	39	11	55	NL	3	22	8	33
PL	6	55	13	74	PL	5	39	7	51	PL	1	16	6	23
PT	7	37	13	57	PT	5	25	7	37	PT	2	12	6	20
RO	5	35	5	45	RO	4	23	3	30	RO	1	12	2	15
SE	12	55	17	84	SE	8	35	9	52	SE	4	20	8	32
SI	6	33	8	47	SI	5	20	5	30	SI	1	13	3	17
SK	7	53	9	69	SK	5	33	5	43	SK	2	20	4	26
<b>Total</b>	<b>257</b>	<b>1262</b>	<b>333</b>	<b>1852</b>	<b>Total</b>	<b>182</b>	<b>837</b>	<b>187</b>	<b>1206</b>	<b>Total</b>	<b>75</b>	<b>425</b>	<b>146</b>	<b>646</b>
<i>Average</i>	<i>10,3</i>	<i>50,5</i>	<i>13,3</i>	<i>74,1</i>	<i>Average</i>	<i>7,3</i>	<i>33,5</i>	<i>7,5</i>	<i>48,2</i>	<i>Average</i>	<i>3,0</i>	<i>17,0</i>	<i>5,8</i>	<i>25,8</i>
<i>Median</i>	<i>7</i>	<i>49</i>	<i>11</i>	<i>69</i>	<i>Median</i>	<i>5</i>	<i>33</i>	<i>6</i>	<i>43</i>	<i>Median</i>	<i>2</i>	<i>16</i>	<i>5</i>	<i>23</i>

Source: JustWatch data

**More information:**  
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