

SVOD Usage in the European Union – 2024 data

Christian Grece and Jean-Augustin Tran
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Introduction

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

Research questions:

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

Methodology

- The viewing time data were provided by Digital i from the 4 main service providers, representing 9 SVOD country catalogues.
- The catalogue data was a snapshot extracted from JustWatch in June 2024.
- Only viewing time on SVOD services was considered. Viewing time is calculated in hours.
- The retained time frame is from 1st January to 30th September 2024.
- A work is defined as either a film or a TV season.
- Streamers' originals exclude content labelled as 'exclusive' and coproductions with TV channels.
- Only the first production country of a work is considered when identifying its region of origin.
- The regions of origin for works are:
 - EU27 (member states of the European Union)
 - GB (works which have as first production country the United Kingdom)
 - Other European countries (all other member states of the Council of Europe)
 - USA
 - Other international (all other countries)
- Genres were assigned by using IMDb genre listings and reassigned according to the following rule:
 - If 'Animation' is in the IMDb genre, the work is classified as Animation.
 - If 'Documentary' is in the IMDb genre, the work is classified as Documentary.
 - All other works are classified as 'live-action' for films and 'Fiction TV' for TV seasons.

Limits

- 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.
- There may be small errors in the identification of a work. We estimate these errors to be at around 1% of works (586 films or 1% of the total and 1017 TV seasons or 2% of the total have no country of production identified).
- Please cite this report as “SVOD Usage in the European Union”, European Audiovisual Observatory.
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Main findings

A. Key characteristics of SVOD usage

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

SVOD usage is much more geared toward TV and SVOD series (78% of viewing time) than films (22%) and, regardless of programme type, much more toward live-action content (88% of viewing time) than documentaries and animation (12%). Live-action film and series are viewed in greater proportion than their representation in the catalogues, whereas documentaries are less viewed than their representation in the catalogues.

Viewing is concentrated in a small number of titles

In contrast with the depth of the catalogues, SVOD usage is also highly concentrated, with less than 0,1% of works accounting for about 14% of total viewing time. Both film and television series are subject to a high concentration of viewing. This suggests that SVOD usage includes both popular titles and a wide range of more niche content (including local content) which is likely to encourage the subscription of consumers with more specific interests. In the future, it will be interesting to see if the launch of advertising tiers by the streamers will further increase the importance of mass-appeal titles.

While originals are among the most successful programmes, they represent a minority of SVOD usage.

Original content from streamers, whether films or series, represents a significant portion of the most viewed programmes. Original films and series account for 54% of the top 100 most viewed programmes. However, when considering all viewing, original content accounts for only 36% of series viewing and 25% of film viewing. Additionally, the weight of originals in time viewing has been declining in recent years.

Key findings

The figures indicate that streamers had less success with their original films than with original TV series. They also show that streamers still rely significantly on third-party catalogues, particularly for films. Furthermore, the decline in the growth of streamers' spending on original content may have had an impact on viewing habits.

Key role of theatrical films

As originals represent a minor part of film viewing, SVOD usage relies heavily on theatrical films, particularly those theatrically released in Europe which account for 64% of film viewing time. However, this share has been slightly declining over recent years. It should be noted that these films are not necessarily recent, with films produced in 2017 or before accounting for 39% of film viewing.

B. PERFORMANCE OF EU AND EUROPEAN CONTENT ON SVOD

European content accounts for 25% of SVOD usage, with 16% attributed to EU content.

EU films demonstrate a comparatively stronger performance than EU series. EU films account for 22% of film viewing, compared to only 14% for EU series. Non-EU other European content is primarily comprised of UK films and series, with a relatively consistent share of approximately 9% across all countries in the sample. The proportion of viewing time allocated to EU content has remained relatively stable since 2020, with a slight increase in the viewing of EU films and a slight decrease in the viewing of EU series.

EU animation is underrepresented in viewership

The share of viewing for EU animation content both for films (8%) and for TV (8%) is way lower than for other genres of programmes. Broadening the scope to other non-EU European works, UK has managed to achieve a significant audience share in animated series (9%) but not in animated films (3%).

Key findings

European documentaries (be it films or TV series) are more popular than other genres, but this is mainly because of UK documentaries.

More than half of EU viewing consists of national content

In 2024, EU national content made up a slightly higher share (55%) of EU content viewing than EU non-national content. The share of national content has increased since 2020 while the share of EU non-national content has decreased. The trend differs between film and TV series:

- for films, similar weight of national and non-national films, and regarding other European works, a lower share for UK films.
- for TV content, a lower share for EU non-national content and, regarding other European works, a higher share for UK series.

Strong variations between countries

The 9 countries in the sample have very different shares of viewing for EU works (ranging from 8% to 25%) and national content in EU content (ranging from close to 0% to over 75%).

Larger producing countries rely more on national content and reach a higher share of viewing for EU content. Smaller producing countries, do not reach the same level of EU content even if they compensate the relative lack of national content by non-national content. Among the 9 countries, Spain has the highest share of viewing time for EU content, driven by the success of national original TV series.

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

Viewing time of EU content is much more concentrated than for content of origin, both for films (the top 100 accounts for 39% of EU films viewing time vs. 19% for films of all origin) and for series (47% for the top 100 vs. 18% for series of all origin). Spain tops the ranking of the most-watched EU films and series.

Films: both EU originals and theatrical films decline

The share of EU theatrical films in EU film viewing time has decreased sharply over time, from 80% in 2020 to 61% in 2024. Surprisingly, the share of streamers' original films in film viewing (27%) has also declined, albeit more moderately. Both categories have been replaced to an extent by non-theatrical films acquired or co-produced by the streamers.

The list of the top 100 EU works provides further evidence that streamers original EU films have not been as successful as anticipated: originals account for only 33% the most-watched EU films, compared with 54% for original films of all origin.

TV series: originals key to audience for EU non-national TV content

The proportion of viewing time devoted to EU originals is significantly higher for series (48%) than for films (27%) and has remained stable over the past years. Accordingly, EU original series are well represented among the most watched EU series (56%).

On the one hand, originals made in a given EU country attract a significant proportion of the audience in that country. On the other hand, they are also the first destination for viewing of EU non-national content in other EU countries.

Content from Spain, France and Germany is the most successful in other EU countries

Spain, France and Germany account for 59% of the viewing time of non-national EU works, with Spain representing a particularly significant proportion of this figure for TV series (over a third of non-national viewing in other EU countries).

C. COMPARING SVOD USAGE AND SVOD CATALOGUES

SVOD usage does not reflect the composition of SVOD catalogues

In all but two countries in the sample (Poland and Spain), EU content is proportionally less watched than its share of the catalogues. The discrepancy is particularly pronounced in Germany, France and Denmark, where the proportion of EU content viewed is 10 percentage points lower than its representation in the catalogue. The discrepancy is comparable when analysing film and TV series data separately.

The gap is especially due to non-national content

In four out of the nine countries, national content is viewed more frequently than its proportionate share of catalogues. Conversely, EU non-national content is viewed at a lower rate than its share of catalogues across all countries in the sample. The data suggests that as streamers need to reach quotas of European works they include a variable proportion of European non-national work which is struggling to achieve a corresponding audience.

Also gap by genre and age of programmes

Documentaries, both films and series, are over-represented in catalogues. Conversely, live action films and series are proportionally more viewed than their share of catalogues. However, documentaries account for a much lower share of viewing time than of catalogues. The same is true of animated TV series. Quite obviously, EU catalogue films (aged five years or more) represent a smaller proportion of audience engagement (27%) compared to their representation in catalogues (60%).

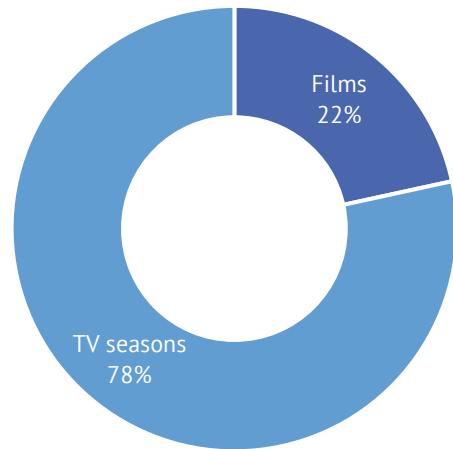
However, there is no reason to believe that SVOD usage should be aligned with the composition of catalogues, given that the latter also serves two purposes: the acquisition and retention of consumers.

Part 1: The SVOD viewing landscape in 9 EU countries

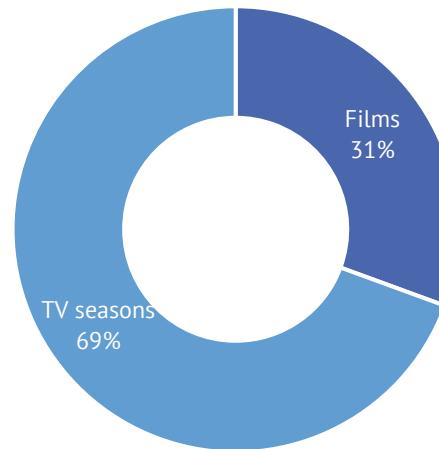
Viewing time dominated by TV seasons

- Longer than films, TV seasons account for 78% of total viewing time on SVOD services in the nine EU countries.
- For EU27 works, TV seasons has a smaller share with 69% of total viewing time.

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



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

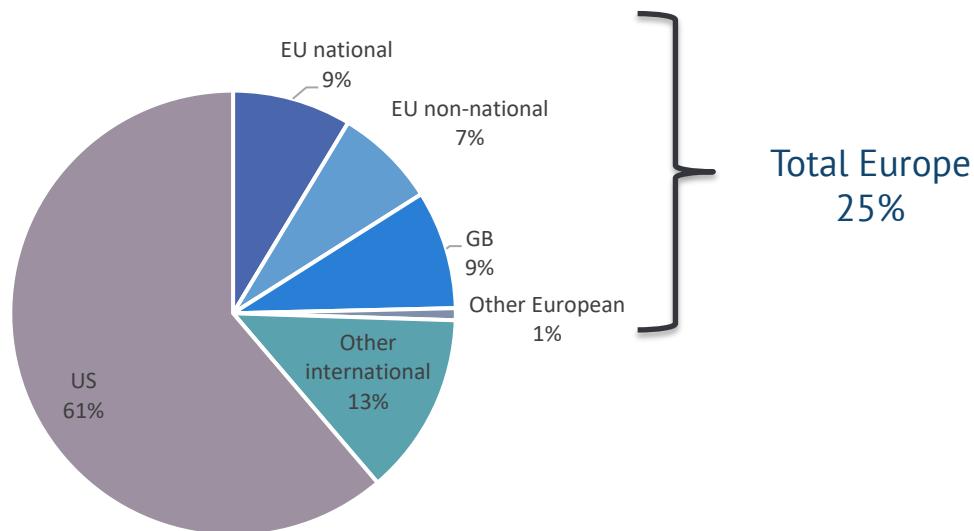


Source: OBS based on Digital i data

European works account for 25% of total viewing time

- Viewing time of European content (EU27+GB+Other European) account for 25% of the total hours watched by European SVOD subscribers in the nine EU countries.
- EU national works are watched more than EU non-national works.
- Unsurprisingly, US works account for 61% of the total hours watched and other international works account for 13%.

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



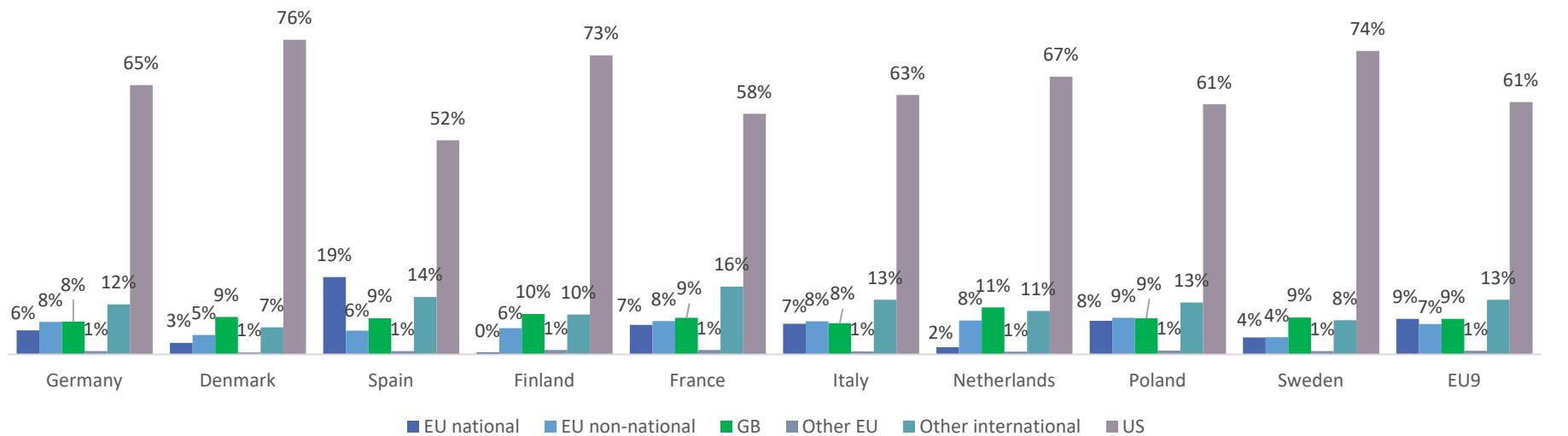
Source: OBS based on Digital i data

European works account for between 17% and 34% of total viewing time in the EU9

- With an EU9 average of 25%, viewing of European works varies widely across the nine European countries, the main difference being the proportion of viewing time devoted to national works.
- Spain has the highest share of viewing time for national works (19%), driven by streaming originals produced in the country, and Finland the lowest (0%).
- Poland has the highest share of viewing time for non-national EU works (9%).
- EU content is over-represented in consumption in Spain, Italy, France and Poland, while US content is over-represented in consumption in the Nordic countries compared to the EU9 average.

Viewing time by country and origin

In % of total viewing time in hours, EU9



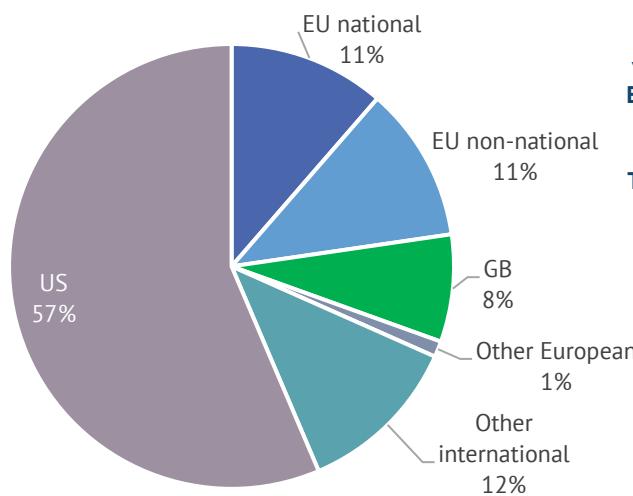
Source: OBS based on Digital i data

European films have a higher share of viewing time than TV seasons

- With 32% of total viewing time of films, European films have a higher share of total viewing time than European TV seasons with 24% of total viewing time of all TV seasons.
- For European films, EU national and EU non-national have the same viewing time share.
- US TV seasons account for 62% of total viewing time and US films for 57%.
- Other international works account for 12% of viewing time for film and 14% of TV seasons.

Viewing time of all films

In % of total viewing time in hours by region of origin

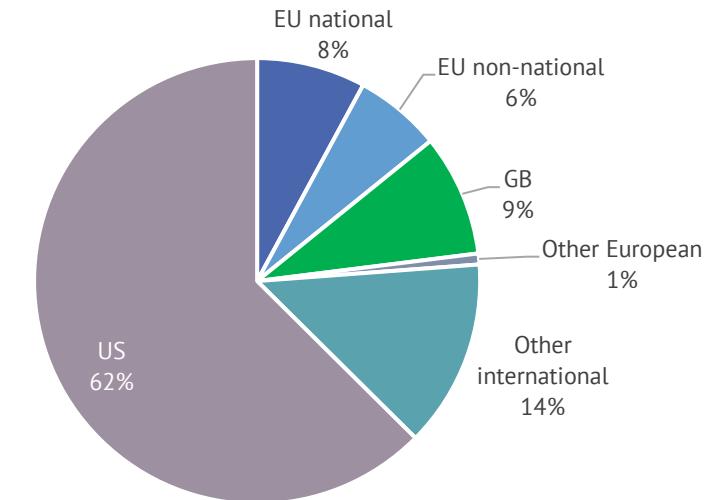


Share of total viewing time of European works:

Films 32%
TV seasons 24%

Viewing time of all TV seasons

In % of total viewing time in hours by region of origin



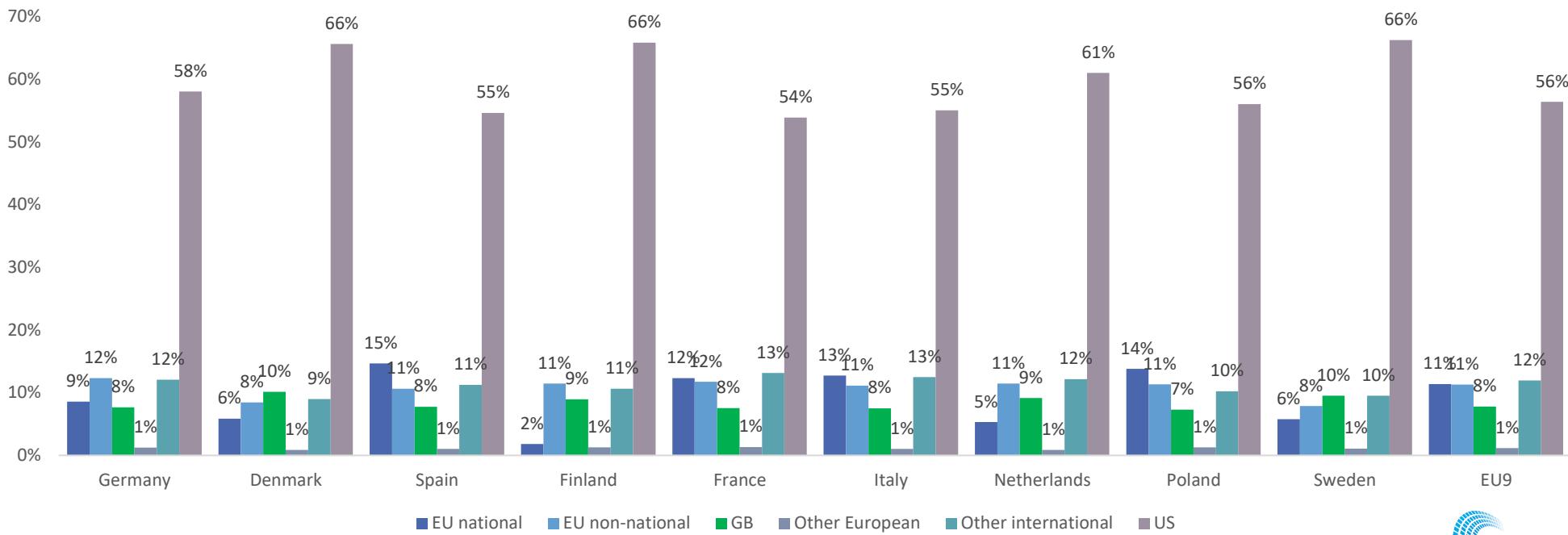
Source: OBS based on Digital i data

European films account for between 23% and 34% of film viewing time in the EU9

- With an EU9 average of 32% of viewing time, the viewing of European films varies considerably between the nine European countries, the main difference being the proportion of viewing time devoted to national films.
- Spain has the highest proportion of viewing time devoted to national films (15%), driven by streaming originals produced in the country, while Finland has the lowest (2%).
- France and Germany have the highest share of viewing time for non-national EU films (12%).
- EU films are over-represented in terms of consumption in Spain, France and Poland, while US films are over-represented in terms of consumption in the Nordic countries, the Netherlands and Germany.

Viewing time all films by country and origin

In % of total viewing time in hours, EU9



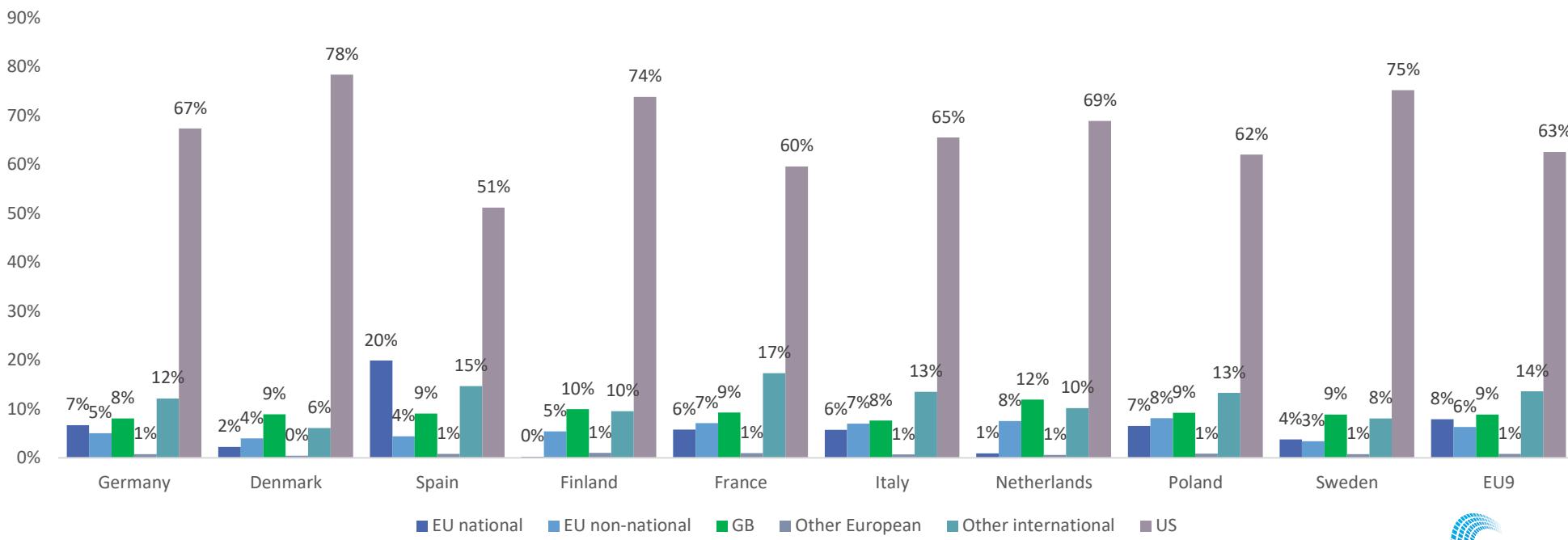
Source: OBS based on Digital i data

European TV seasons account for between 17% and 34% of TV seasons viewing time in the EU9

- With an average of 24% of viewing time in the EU9, the viewing of European TV seasons is significantly lower than the viewing of European films in the nine European countries.
- Spain has the country with the highest share of viewing time for national TV seasons with 20%, driven by streaming originals produced in the country, and Finland the lowest with 0%.
- The Netherlands and Poland have the highest share of viewing time for EU non-national TV seasons with 12%.
- EU TV seasons are over-represented in terms of consumption in Spain and Poland, while US TV seasons are over-represented in consumption in the Nordic countries, the Netherlands, Italy and Germany.

Viewing time all TV seasons by country and origin

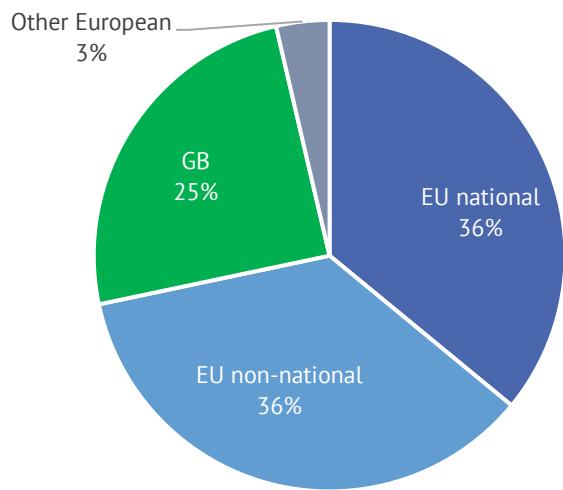
In % of total viewing time in hours, EU9



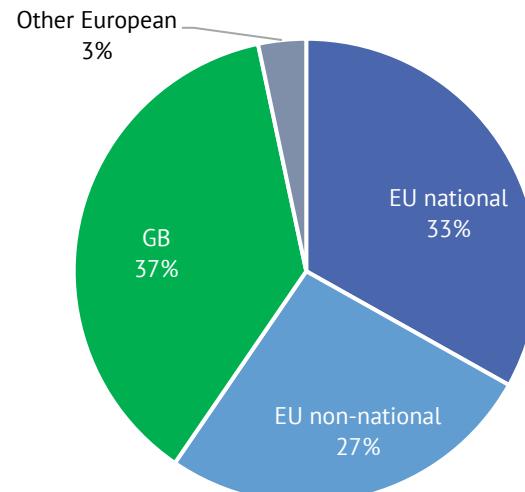
EU national and non-national content accounts for majority of European viewing time

- Viewing of films by EU nationals and non-EU nationals accounts for most European film viewing time, with each category accounting for 36% of viewing time. Films such as *La Sociedad de la Nieve* and *Sous la Seine*, both Netflix originals, are among the most popular.
- British TV seasons lead European TV seasons viewing time with 37% of European TV seasons viewing time, thanks to Netflix's originals such as *Fool me Once*, *Baby Reindeer* and *3 Body Problem*.

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



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

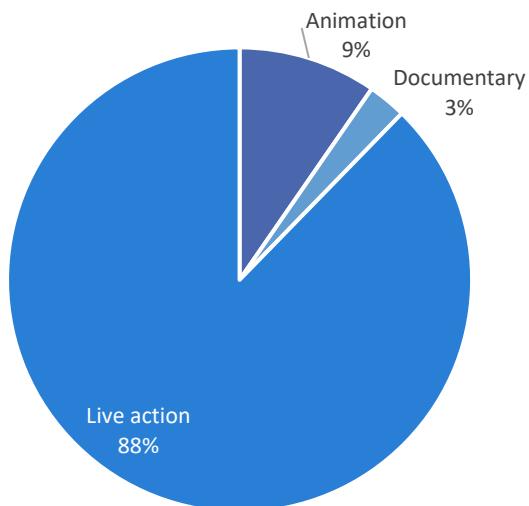


Source: OBS based on Digital i data

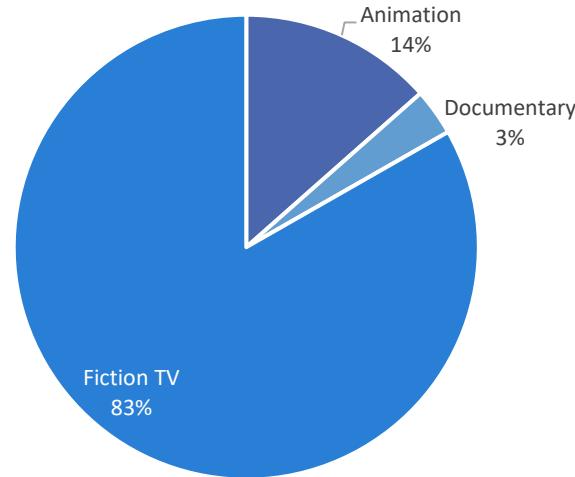
Viewing time is dominated by live action and fiction TV

- Unsurprisingly, live-action films and fiction TV series are the most watched by European viewers, with live-action films accounting for 88% of total viewing time (and live-action films accounting for 85% of films in SVOD catalogues and fiction TV accounting for 83% of TV viewing time but only 65% of TV series in catalogues).
- Documentaries, on the other hand, account for 3% of film viewing (and 12% of all films in SVOD catalogues) and 3% of TV season viewing (and 13% of all TV seasons in catalogues).
- The share of animated films in film viewing (9% of total viewing time) is higher than the share of animated films in catalogues (5%). For animated TV series, the share of total viewing time (14%) is well below the share of animated TV series in SVOD catalogues (22%).

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



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

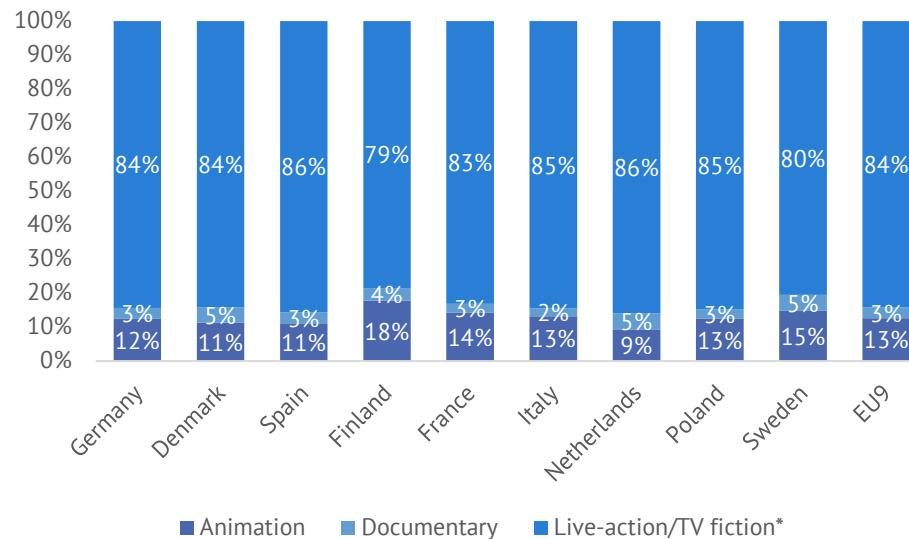


Source: OBS based on Digital i data

Genre consumption is very similar across countries

- The nine countries surveyed have roughly the same level of consumption in terms of genre, with live-action films and TV fiction dominating.
- Animation is the second most consumed genre, with consumption ranging from 9% (NL) to 18% (FI) in the nine EU countries.
- Documentaries account for a similar proportion of total viewing time, ranging from 2% (IT) to 5% (SE, DK, NL) across countries.

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



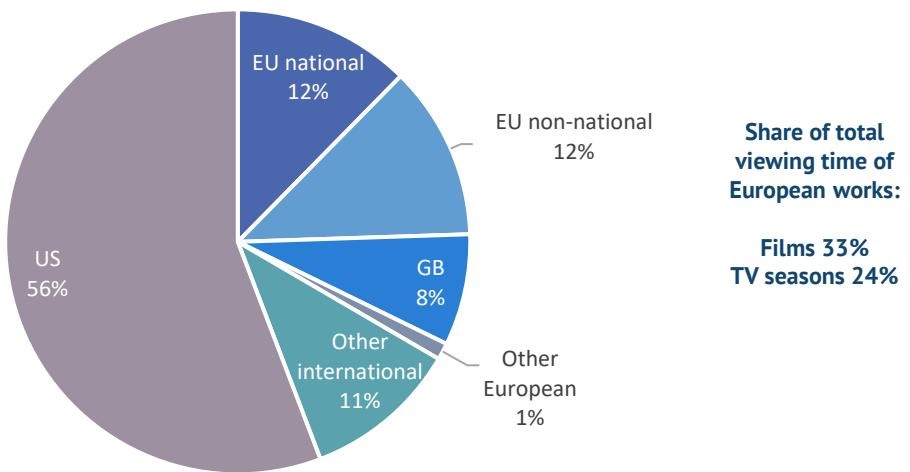
Source: OBS based on Digital i data

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

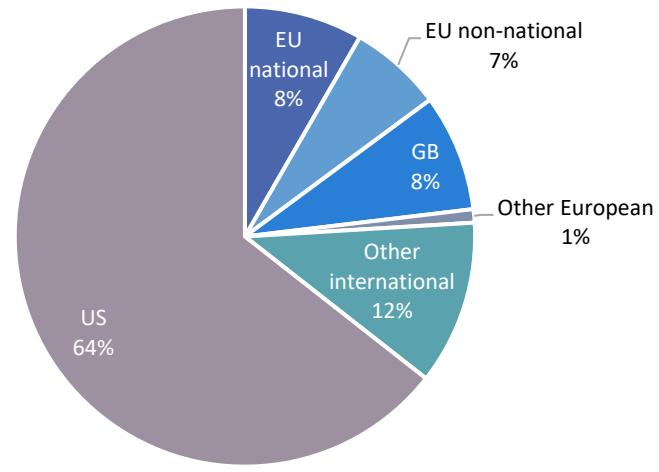
Live action – EU films get more shares than EU TV seasons

- Both for films and TV series, EU viewers watch more or less as much national films and TV series as EU non-national, on average in the EU 9.
- For live-action films, European films account for 33% of total viewing time, US live-action films for 56% of total viewing time and other international films make up 11% of total viewing time.
- European TV seasons make up 24% of total viewing time with a slight preference for national TV series when it comes to European series. US TV series account for 64% of total viewing time.

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



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



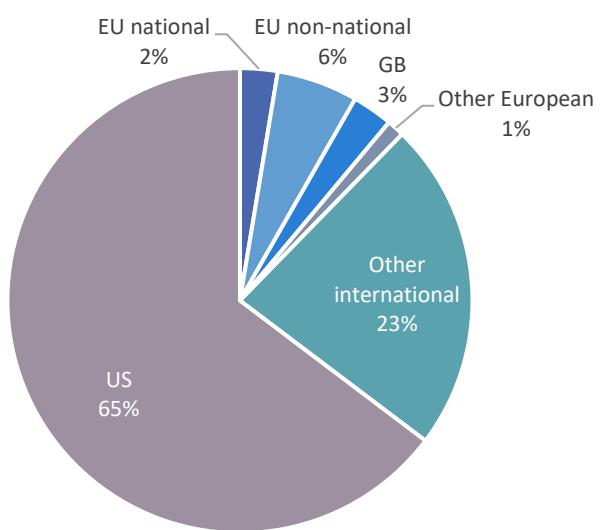
Source: OBS based on Digital i data

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

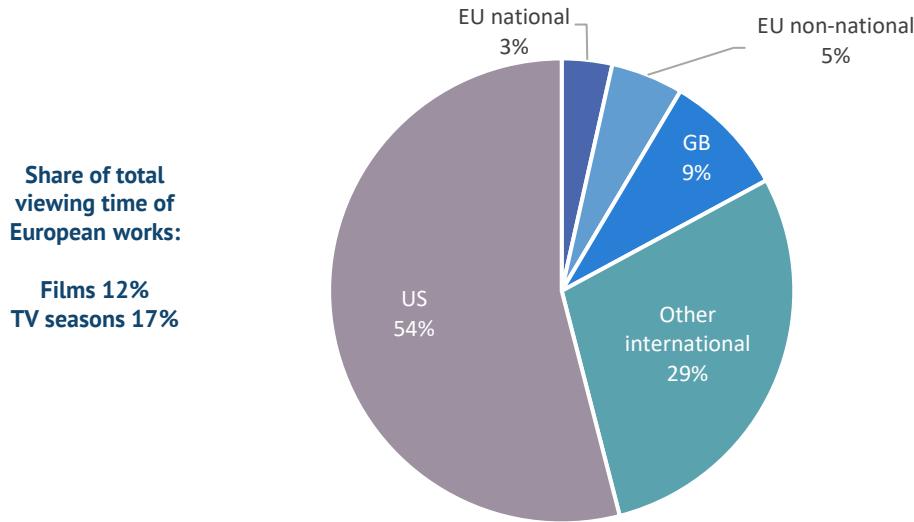
Animation - US and international account for the majority of viewing time in both films and TV seasons

- In the case of films or TV series, US animated works take the lion's share, accounting for 65% of viewing time for films and 54% for TV seasons.
- European animation films account for only 12% of viewing time; for TV seasons, European animation films account for 17% of viewing time.
- International animation account for 29% of viewing of animation TV seasons, mainly Japanese anime series. International animation films account for 23% of viewing time.

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



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



Share of total viewing time of European works:

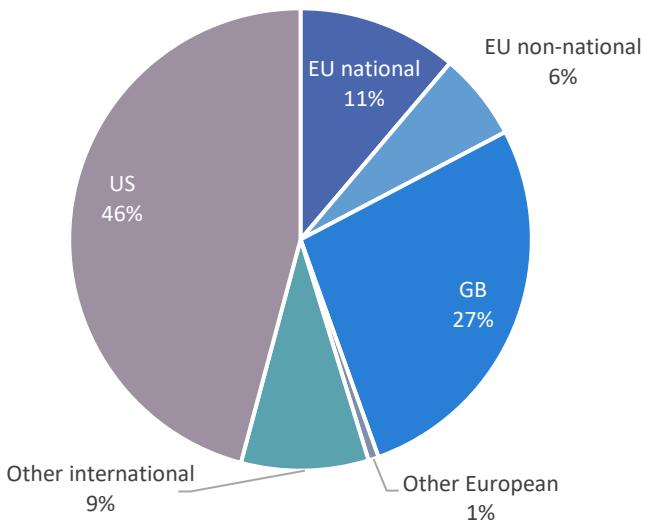
Films 12%
TV seasons 17%

Source: OBS based on Digital i data

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

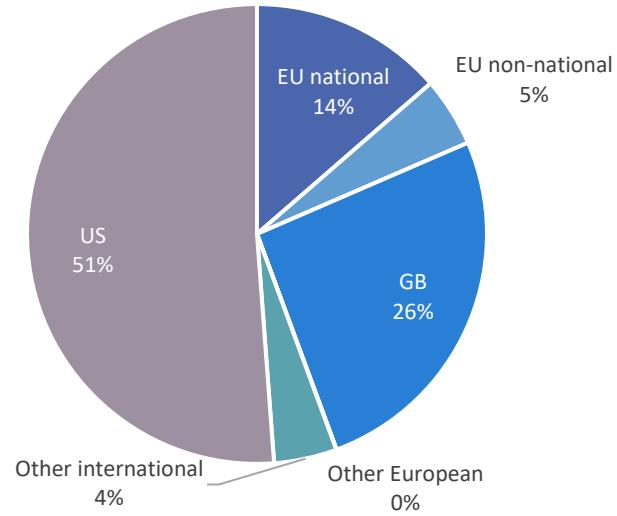
- European viewers prefer mainly to watch European documentary films with 44% of total documentary viewing time. British documentary films account for 27% of documentary film viewing time, followed by national documentary films with 11%.
- When it comes to TV documentaries, US documentaries account for 51% of total documentary TV viewing time, followed by European documentary TV seasons with 44% of viewing time. Notably, for European documentary TV seasons, viewers watch more GB documentaries with 14% of total viewing time.

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



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

Share of total viewing time of European works:
Films 44%
TV seasons 44%



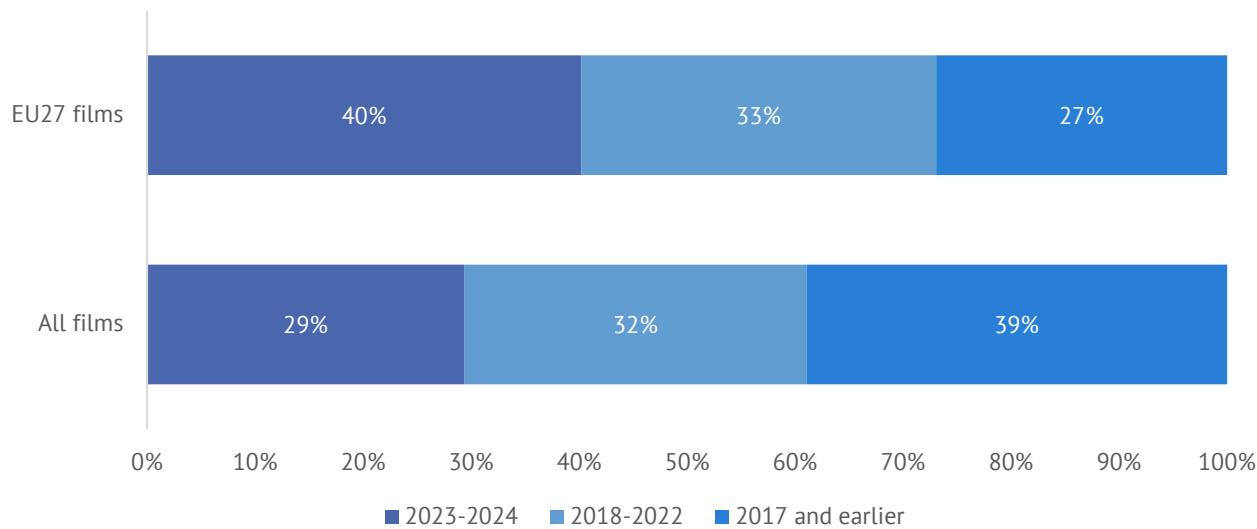
Source: OBS based on Digital i data

Recent films account for more viewing time of EU27 titles' viewing time than all works

- Viewers prefer to watch more recent films. Films produced in 2023 and 2024 account for 29% of total viewing time.
- For EU27 films, this trend is even more pronounced, with recent EU27 films accounting for 40% of all EU27 film viewing time.
- Films produced between 2018 and 2022 account for 32% of total viewing time and 33% of EU27 titles viewing time.

Films - Split of viewing time by origin and by year of production

In % of total viewing time in hours, EU9

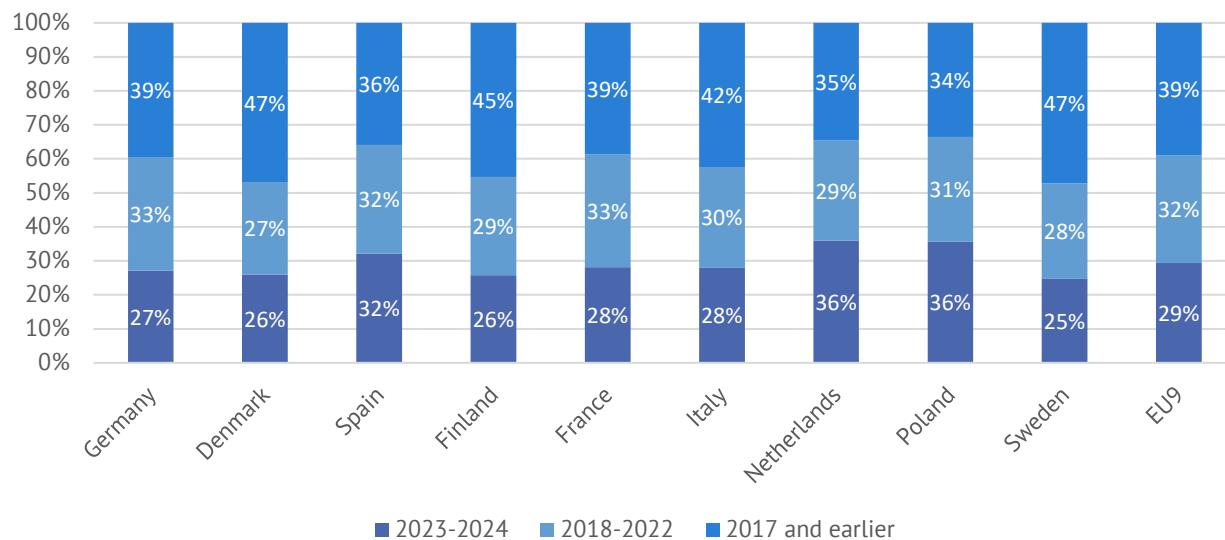


Source: OBS based on Digital i data

Recently produced titles get between 25% and 36% of viewing time in the EU9

- In the Netherlands and Poland recent films get the most viewing time (36%) while viewers in Denmark and Finland prefer older films.

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

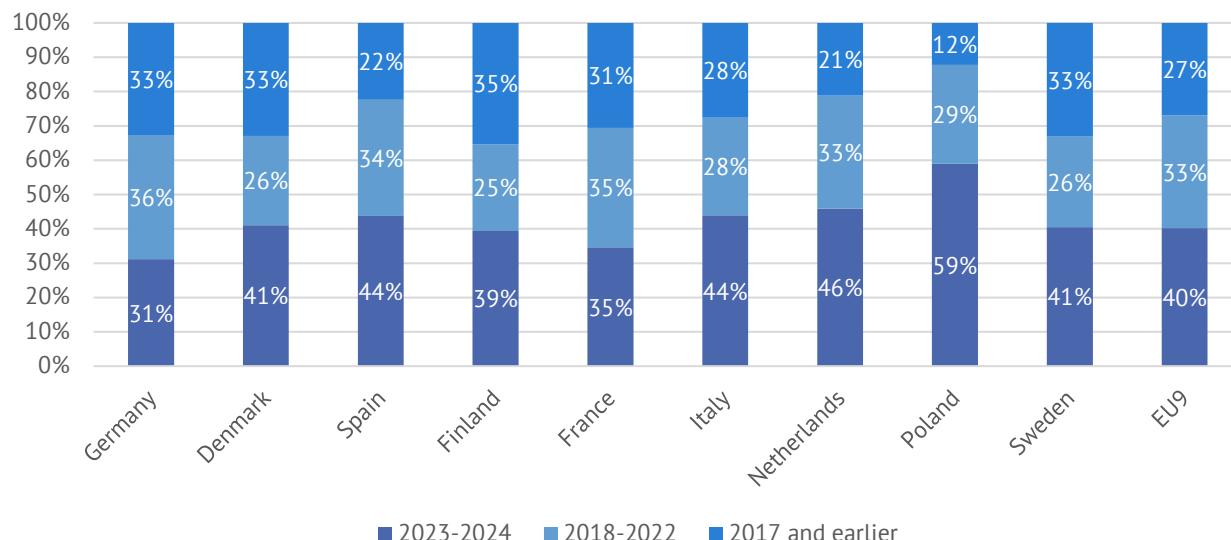


Source: OBS based on Digital i

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

- On average recent films get more viewing time in the sample (11 p.p.).
- Again, it is in Poland and the Netherlands that recent films get the most viewing time (59% and 46% respectively).
- Viewers from Finland, Denmark, Germany and Sweden tend to watch more older films than the rest of the sample.

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

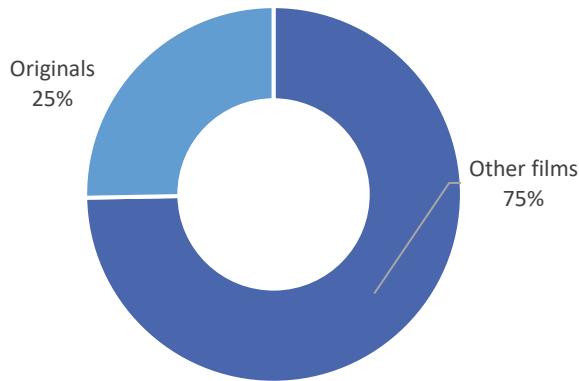


Source: OBS based on Digital i

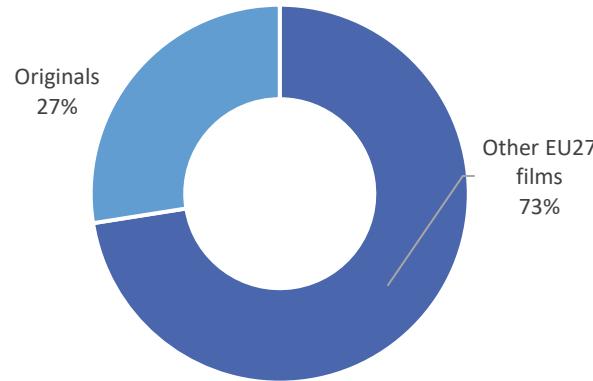
Original films account for 25% of film viewing

- Original films account for 25% of all film viewing time and original EU27 films account for 27% of all EU27 film viewing time.
- 61 US films, mostly blockbusters, are among the top 100 list of films of all origins, 8 GB films, 19 EU27 films, and 1 other international film respectively.
- Films with a theatrical release have been marketed to audiences and benefit from greater audience awareness which in turn has a positive impact on consumption.

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



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



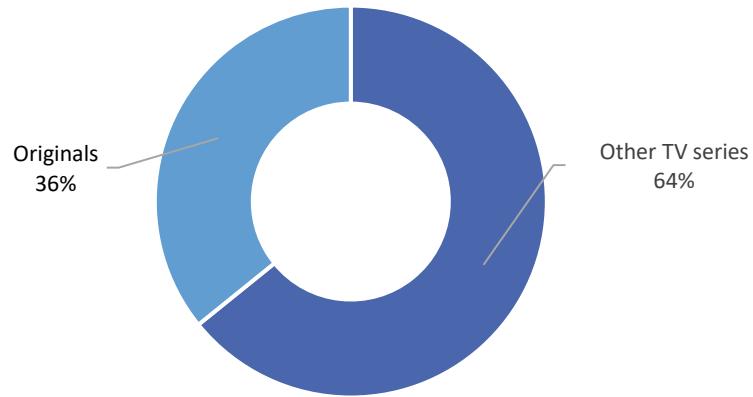
Source: OBS based on Digital i data

Original EU27 TV seasons account for more than half of EU27 TV seasons viewing

- Most of the viewing time for TV series comes from original TV series, whether for all TV seasons or for EU27 TV seasons.
- In fact, the top 10 list of TV seasons, for all works and for EU27 TV seasons, contains a majority of original productions.
- The list of the top 100 TV seasons for works of all origins contains 85 original productions compared with 68 original productions for the top 100 EU27 TV seasons.
- Original productions may also be promoted more strongly on the home pages of streaming services.

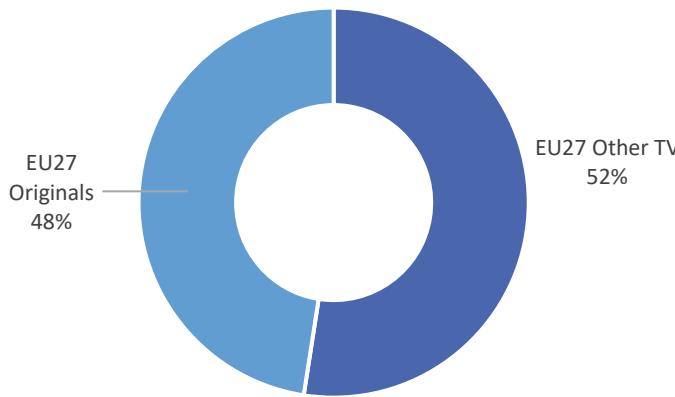
Split of viewing time all TV seasons - TV series

In % of total viewing time in hours, EU9 original and non-original



Split of viewing time EU27 TV seasons - original and non-original TV series

In % of total viewing time in hours, EU9

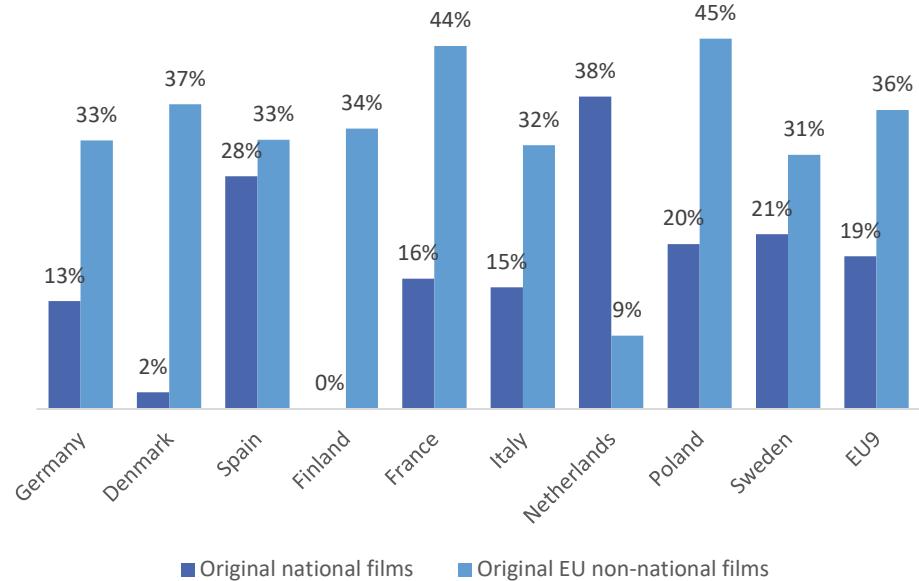


Source: OBS based on Digital i data

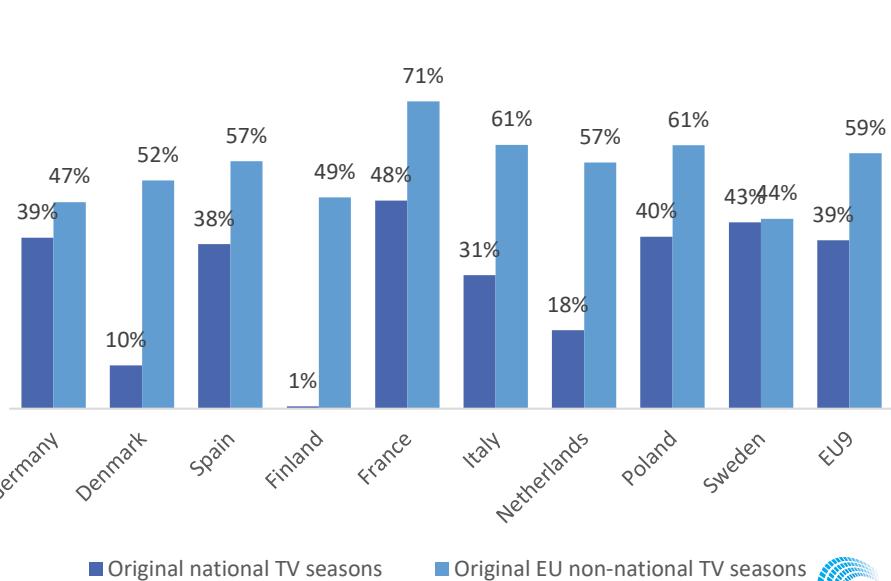
Most of the viewing time for EU non-national TV seasons is generated through originals

- On average in the EU9, EU non-national original TV seasons account for 59% of EU non-national TV viewing time, showing that for TV seasons, streaming originals such as *Bridgerton*, *Fool Me Once* or *The Three Body Problem* account for most of the EU non-national viewing time by subscribers.
- On the other hand, national originals account for 39% of national TV viewing time on average in the EU9.
- For national and non-national films, most of the viewing time is attributable to non-original films.

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



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

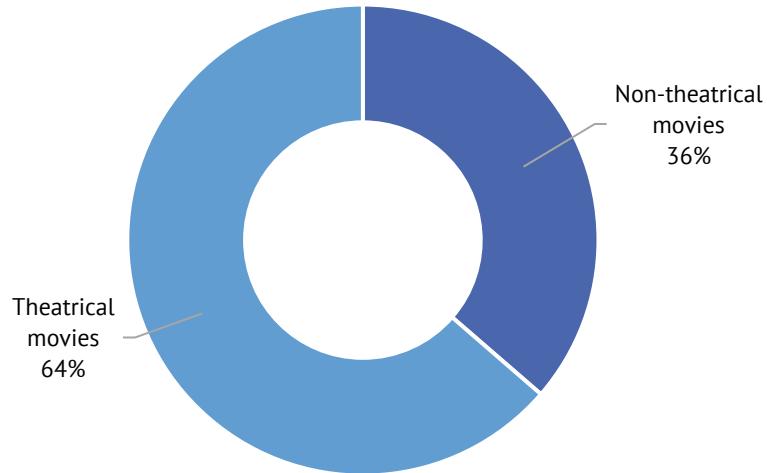


Source: OBS based on Digital i data

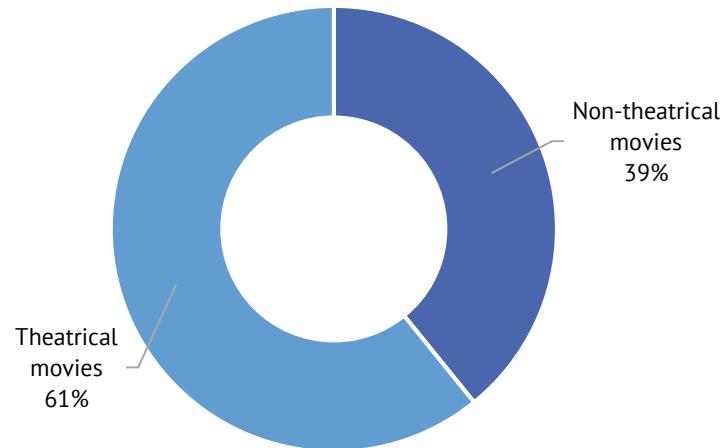
Theatrical films dominates viewing time

- Films released in cinemas accounts for the majority of viewing time with 64% and 61% of viewing time for all films and EU27 films respectively, as films released in cinemas are better known by audiences.
- Nevertheless, only 2 of the top 10 most watched films were released in cinemas (*La Sociedad de la nieve* and *Dune 1*) which may be related to a more intensive promotion on the homepages of original streaming services.

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



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



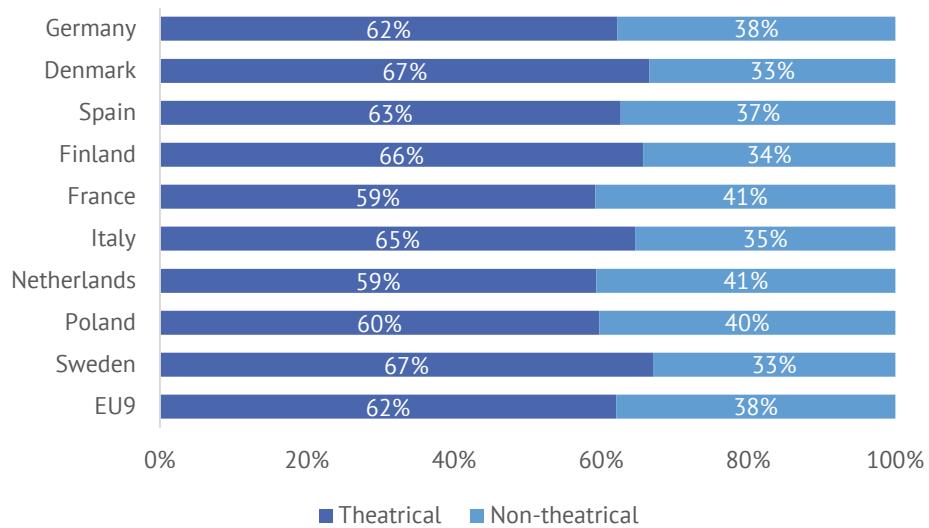
Source: OBS based on Digital i data

Theatrical film titles generate the majority of viewing time

- Theatrical films tend to receive the majority of viewing time, whether for works of all origins or for EU27 titles.
- In Denmark and in Sweden, theatrical films of all origins receive the most viewing time (67%).
- Poland is the only country where EU27 non-theatrical films receive more viewing time than theatrical films. In fact, it is the only country where EU27 non-theatrical films receive more viewing time than EU27 theatrical titles.

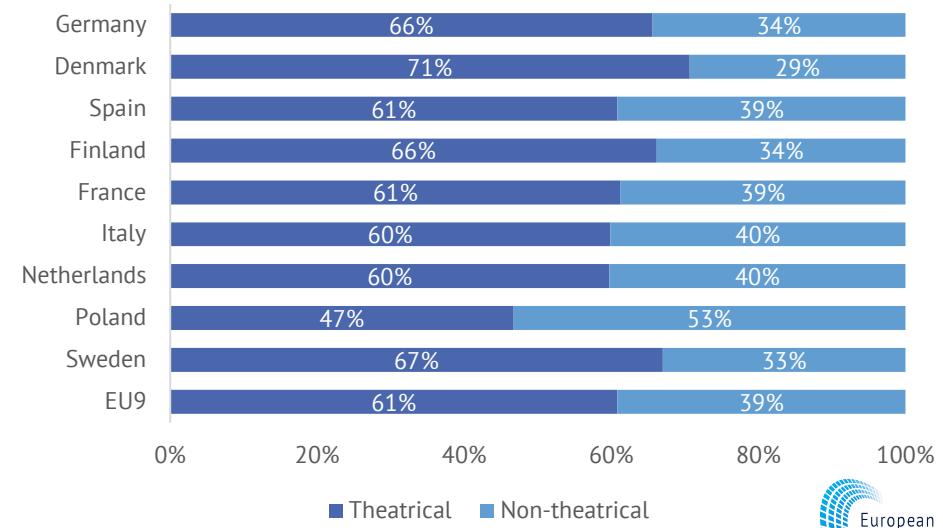
Share of viewing time all origins films – Theatrical and non-theatrical films

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



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

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



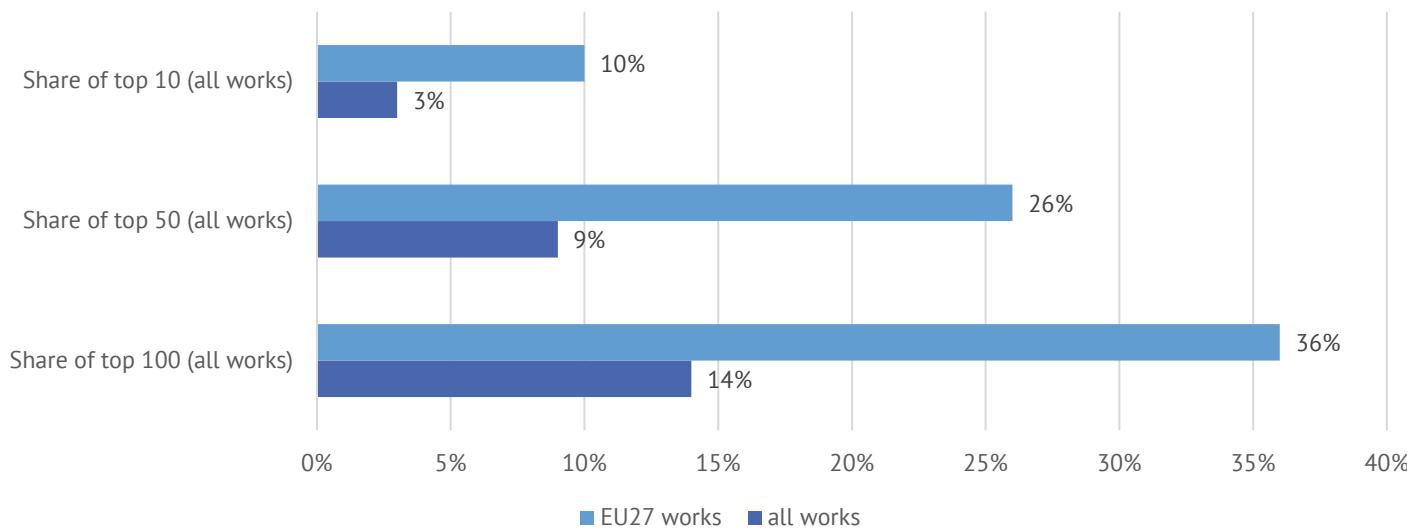
Source: OBS based on Digital i data

Concentration – Large proportion of viewing time generated by few titles

- 10 works account for 3% of total viewing time and for 10% of EU27 viewing time.
- EU27 works viewing time is more concentrated than works of all origins.

All works - Share of viewing time of the most watched works

In % of total viewing time in hours, EU9



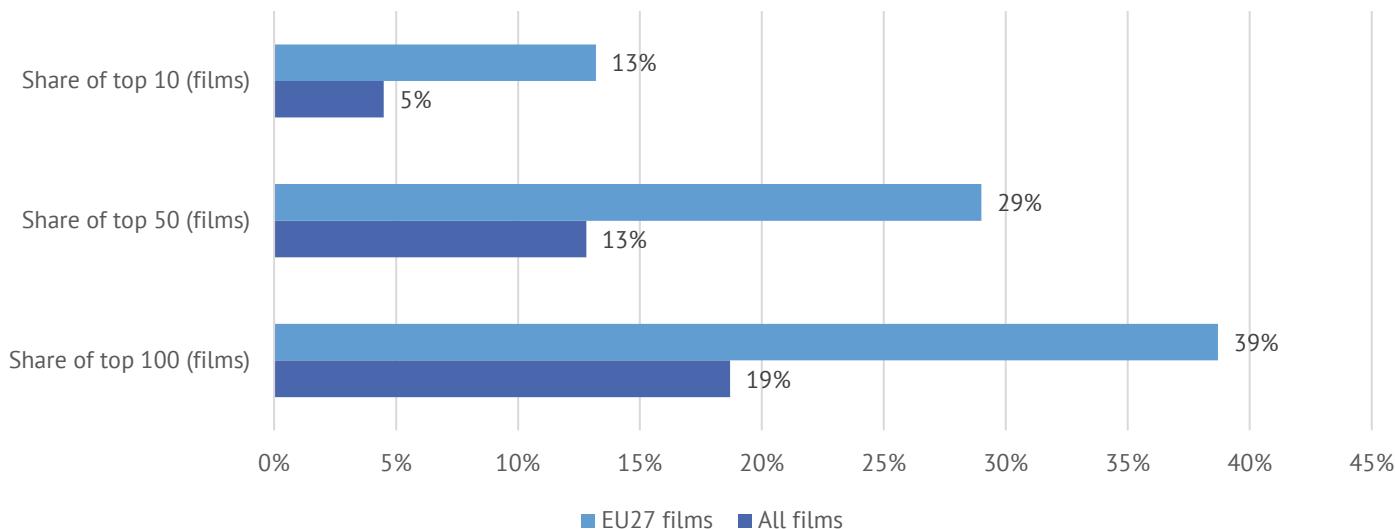
Source: OBS based on Digital i data

Concentration of films – the top 100 EU27 films account for 40% of EU27 film viewing time

- 56 713 unique film titles were included in the SVOD measurement of which 12 025 were unique EU27 film titles.
- For films of all origins, 65 films out of the top 100 films were produced in 2022 or 2023 and 20 before 2017.

Films - Share of viewing time of the most watched films

In % of total viewing time in hours, EU9



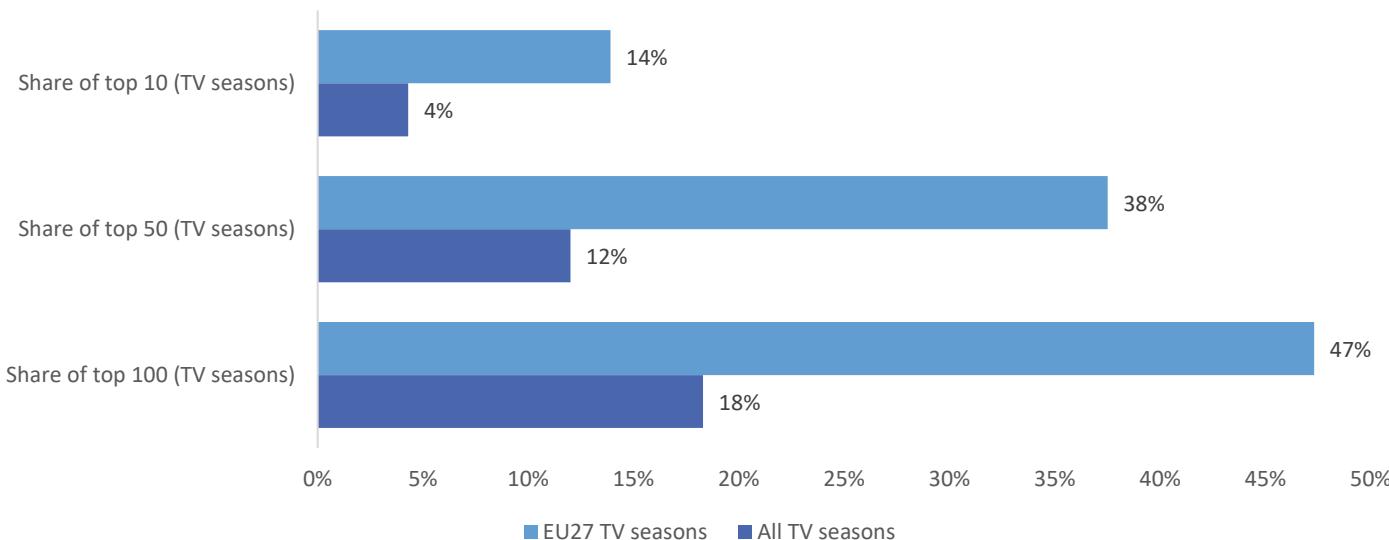
Source: OBS based on Digital i data

Concentration of TV – the top 100 EU27 TV seasons account for 47% of EU27 viewing time

- 59 030 unique TV season titles were included in the SVOD measurement of which 7 121 are unique EU27 film titles.
- The top 100 TV seasons account for 18% of viewing time for TV seasons of all origins (with 64 US TV seasons) while the top 100 EU27 TV seasons account for 47% of viewing time for EU27 TV seasons.

TV seasons - Share of viewing time of the most watched films

In % of total viewing time in hours, EU9

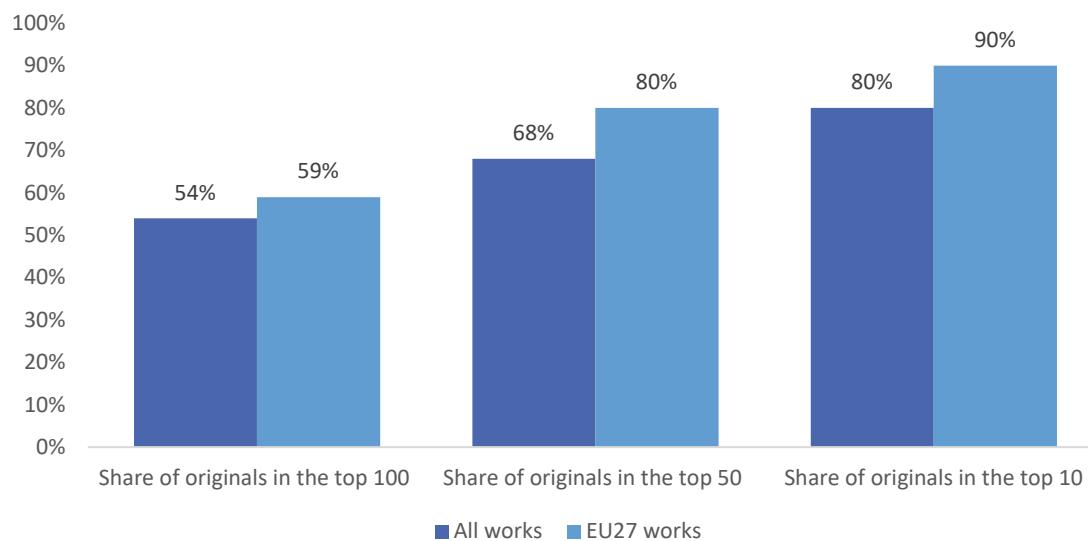


Source: OBS based on Digital i data

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

- Original works dominate the list of most-viewed content on SVOD services in the EU9.
- In the top 100 works most watched works, originals account for 54% of works of all origins and for 59% of works from the EU27, while the top 10 works are even more dominated by originals: with 8 out of the top 10 most watched works are original streaming productions with titles such as *Bridgerton*, *Fallout* or *The Boys*.

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



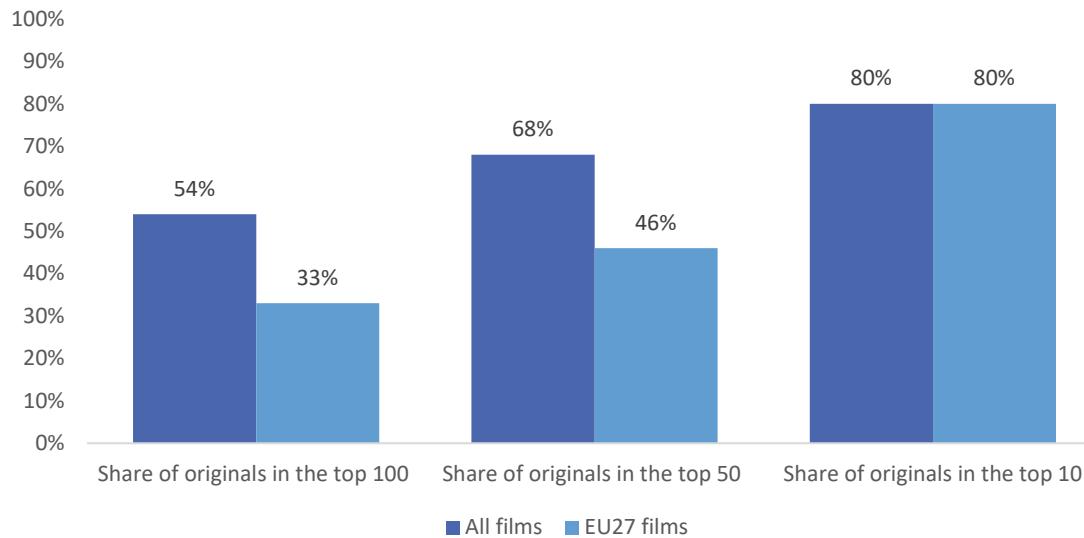
Source: OBS based on Digital i data

Originals – Fewer original films than all other films in the EU27 top list of most watched films

- Original films are less represented in the top EU27 films than in the top films of all origins.
- In the top 100 most watched films, originals represent 54% of films from all origins and only 33% of EU27 films.
- The most watched films are mainly original streaming productions.

Films - Share of originals of the most watched films

In % of original films, EU9



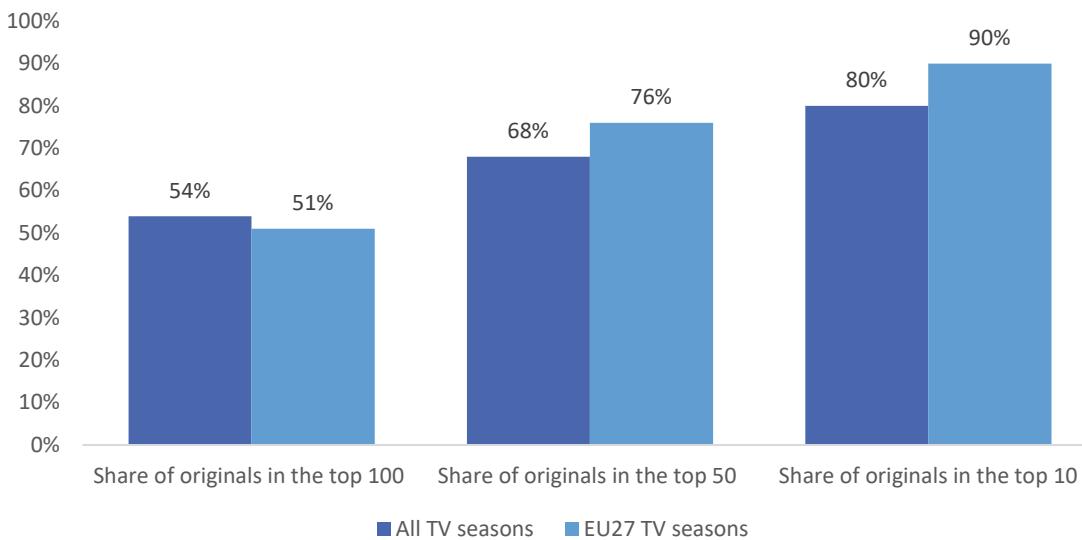
Source: OBS based on Digital i data

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

- In the top 100 most-watched TV programmes, originals account for 54% of the viewing time of TV programmes of all origins and EU27 originals account for 51% of the viewing time of the top 100 EU27 TV programmes.
- With the exception of *Mano de hierro*, the EU27 top 10 are made up entirely of originals.

TV seasons - Share of originals of the most watched TV seasons

In % of original TV seasons, EU9



Source: OBS based on Digital i data

Concentration – All works top lists

All works – Top 10 all regions of origin
In total viewing time in hours, EU9

Rank	Original title	Year	First production country	Region	Type	Original
1	Bridgerton S3	2020	United States	US	series	yes
2	Fool Me Once S1	2024	United Kingdom	GB	series	yes
3	3 Body Problem S1	2024	United Kingdom	GB	series	yes
4	The Gentlemen S1	2024	United Kingdom	GB	series	no
5	Fallout S1	2024	United States	US	series	yes
6	Berlín S1	2023	Spain	EU27	series	yes
7	Shôgun S1	2024	United States	US	series	no
8	Avatar: The Last Airbender S1	2024	United States	US	series	yes
9	Bridgerton S2	2020	United States	US	series	yes
10	Bridgerton S1	2020	United States	US	series	yes

All works – Top 10 EU27
In total viewing time in hours, EU9

Rank	Original title	Year	First production country	Region	Type	Original
1	Berlín S1	2023	Spain	EU27	series	yes
2	El caso Asunta S1	2024	Spain	EU27	series	yes
3	Ni una más S1	2024	Spain	EU27	series	yes
4	La sociedad de la nieve	2023	Spain	EU27	movie	yes
5	Entrevías S3	2021	Spain	EU27	series	yes
6	Anthracite S1	2024	France	EU27	series	yes
7	Mano de hierro S1	2024	Spain	EU27	series	no
8	Machos Alfa S2	2022	Spain	EU27	series	yes
9	Respira S1	2024	Spain	EU27	series	yes
10	Maxton Hall - Die Welt zwischen uns S1	2024	Germany	EU27	series	yes

Source: OBS based on Digital i data

Concentration – Films top lists

Films – Top 10 all regions of origin
In total viewing time in hours, EU9

Rank	Film title	Year	First production country	Region	Original
1	La sociedad de la nieve	2023	Spain	EU27	yes
2	Damsel	2024	United States	US	yes
3	Lift	2024	United States	US	yes
4	Rebel Moon - Part One: A Child of Fire	2023	United States	US	yes
5	Rebel Moon - Part Two: The Scargiver	2024	United States	US	yes
6	Atlas	2024	United States	US	yes
7	Rebel Ridge	2024	United States	US	yes
8	Dune: Part One	2021	United States	US	no
9	Beverly Hills Cop: Axel F	2024	United States	US	yes
10	Sous la Seine	2024	France	EU27	yes

Films – Top 10 EU27
In total viewing time in hours, EU9

Rank	Film title	Year	First production country	Region	Original
1	La sociedad de la nieve	2023	Spain	EU27	yes
2	Sous la Seine	2024	France	EU27	yes
3	Fabbricante di lacrime	2024	Italy	EU27	yes
4	Irish Wish	2024	Ireland	EU27	no
5	The Abyss	2023	Sweden	EU27	yes
6	Colors of Evil: Red	2024	Poland	EU27	yes
7	A través de tu mirada	2024	Spain	EU27	yes
8	Pared con pared	2024	Spain	EU27	yes
9	Le salaire de la peur	2024	France	EU27	no
10	Inheritance	2024	Poland	EU27	yes
11	Culpa mía	2023	Spain	EU27	yes

Source: OBS based on Digital i data

Concentration – TV seasons top lists

TV seasons – Top 10 all regions of origin

In total viewing time in hours, EU9

Rank	Original TV title	Year	First production country	Region	Original
1	Bridgerton S3	2020	United States	US	yes
2	Fool Me Once S1	2024	United Kingdom	GB	yes
3	3 Body Problem S1	2024	United Kingdom	GB	yes
4	The Gentlemen S1	2024	United Kingdom	GB	no
5	Fallout S1	2024	United States	US	yes
6	Berlín S1	2023	Spain	EU27	yes
7	Shôgun S1	2024	United States	US	no
8	Avatar: The Last Airbender S1	2024	United States	US	yes
9	Bridgerton S2	2020	United States	US	yes
10	Bridgerton S1	2020	United States	US	yes

TV seasons – Top 10 EU27

In total viewing time in hours, EU9

Rank	Original TV title	Year	First production country	Region	Original
1	Berlín S1	2023	Spain	EU27	yes
2	El caso Asunta S1	2024	Spain	EU27	yes
3	Ni una más S1	2024	Spain	EU27	yes
4	Entrevías S3	2021	Spain	EU27	yes
5	Anthracite S1	2024	France	EU27	yes
6	Mano de hierro S1	2024	Spain	EU27	no
7	Machos Alfa S2	2022	Spain	EU27	yes
8	Respira S1	2024	Spain	EU27	yes
9	Maxton Hall - Die Welt zwischen uns S1	2024	Germany	EU27	yes
10	Furies S1	2024	France	EU27	yes

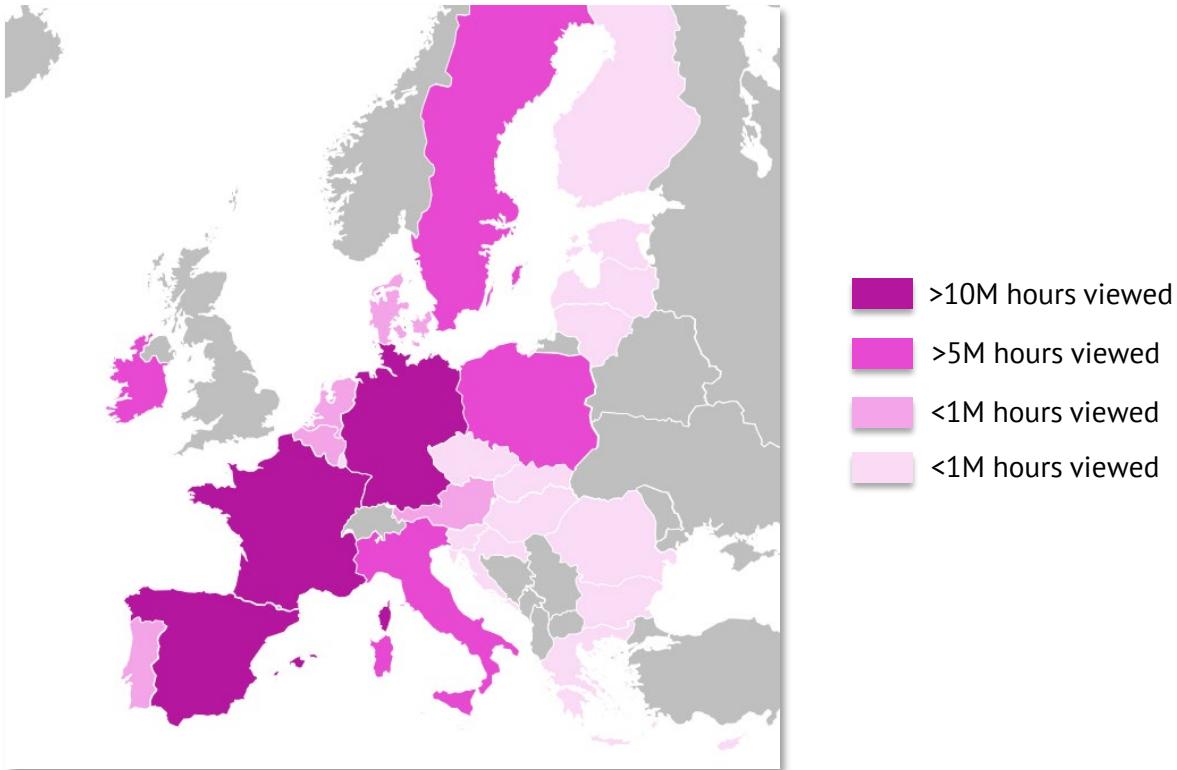
Source: OBS based on Digital i data

Viewing time of exported EU works

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

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

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

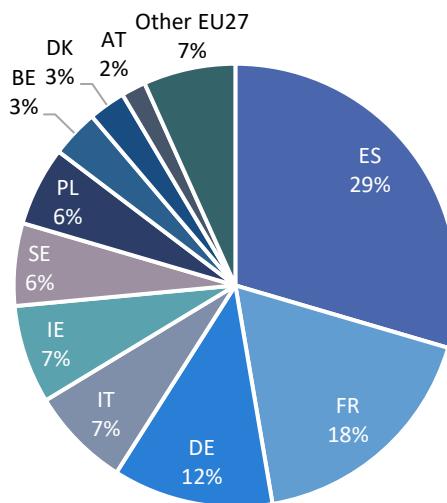


Source: OBS based on Digital i data

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

- The top 10 countries account for 93% of viewing time.
- The 3 exporting countries account for 59% of film and TV consumption (Spain, France, and Germany).
- 15 EU countries account for less than 4% of viewing time for EU non-national works.

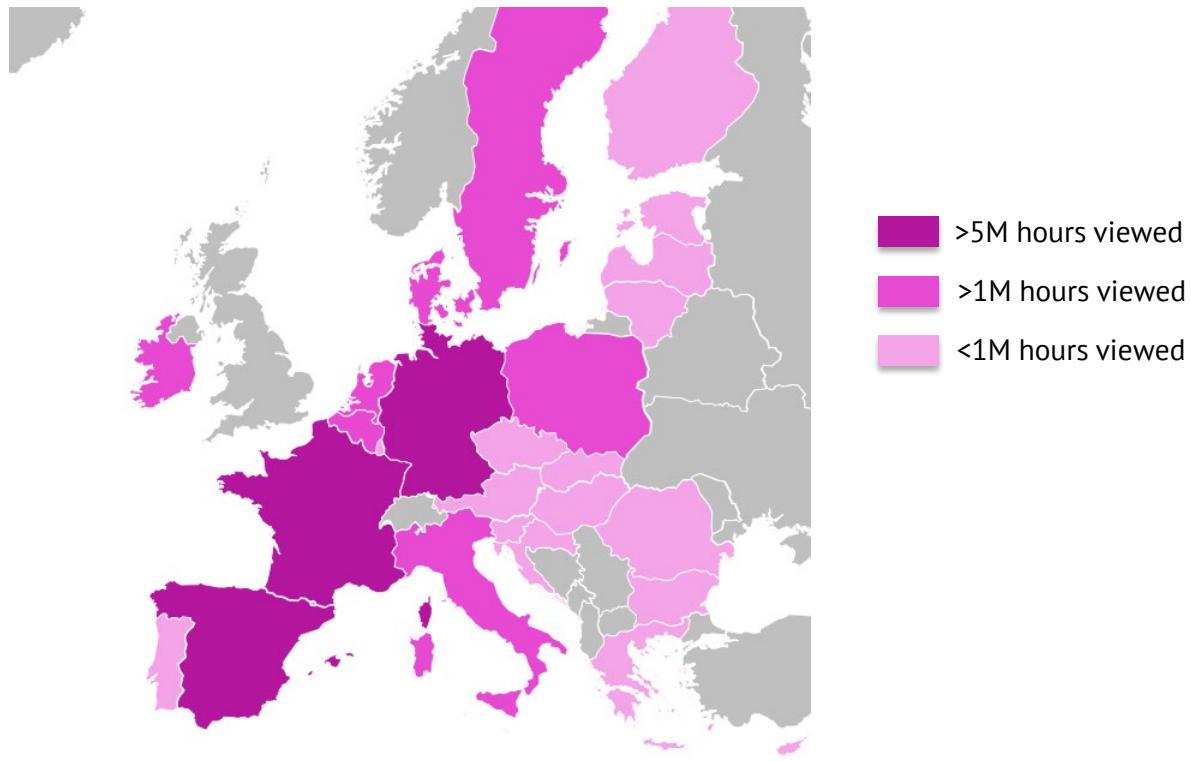
Share of viewing time of EU non-national
works by EU 27 production countries



Source: OBS based on Digital i data

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

- The top three exporting countries in terms of viewing time outside their national market are Spain, France and Germany.
- Poland, Italy, Sweden, Ireland, Belgium, Denmark and the Netherlands are medium-sized countries in terms of the number of viewing hours of their works outside their domestic markets.

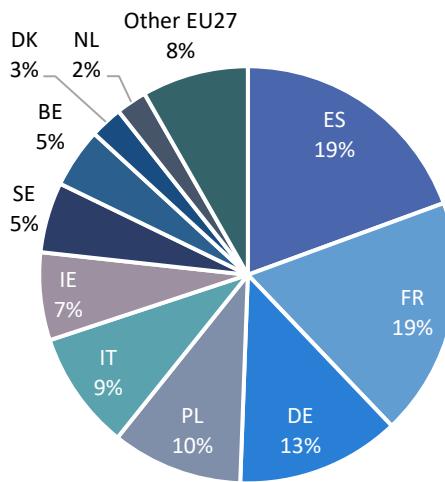


Source: OBS based on Digital i data

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

- The top 10 countries account for 92% of the viewing time of non-national films in the EU.
- 3 countries account for half of the total EU consumption of non-national film (Spain, France and Germany).

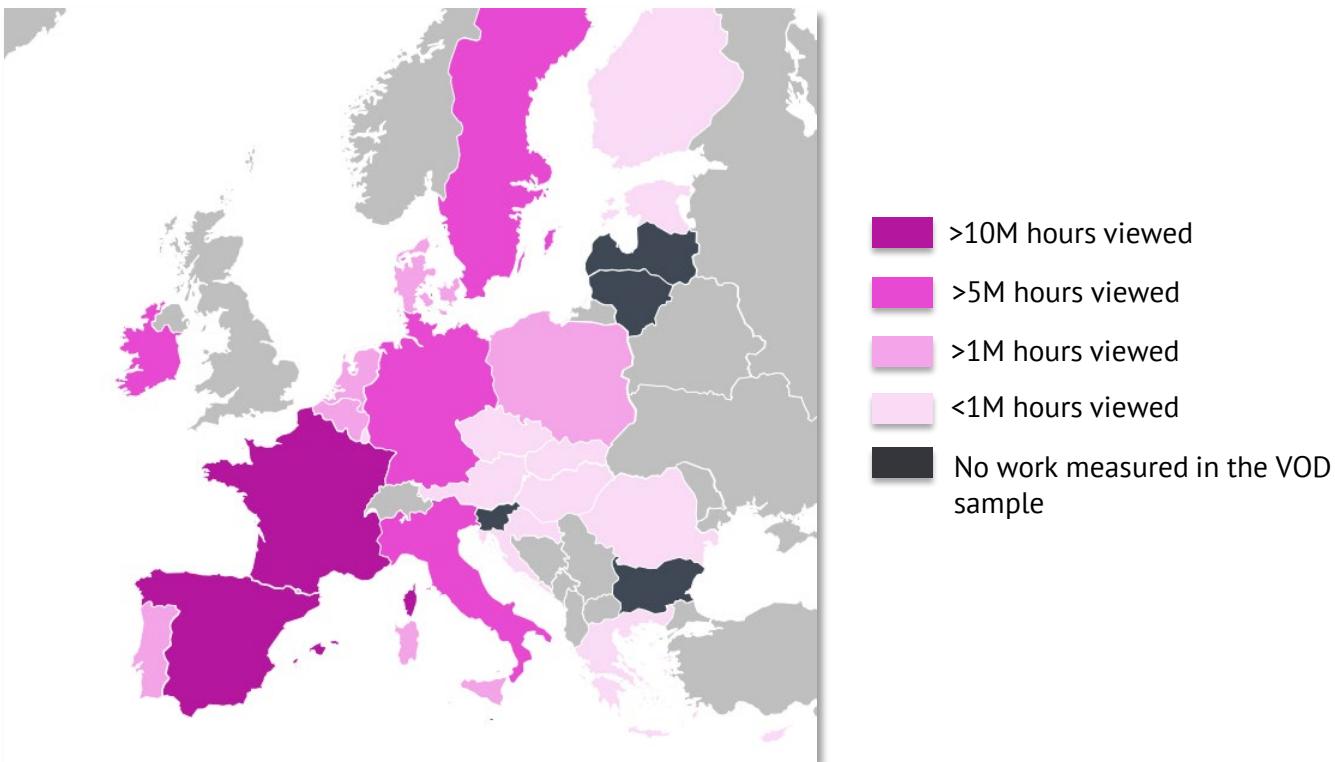
Share of viewing time of EU non-national films
by EU 27 production countries



Source: OBS based on Digital i data

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

- The top three exporting countries with the highest viewing time outside their national markets are Spain and France.
- Germany, Ireland, Italy and Sweden are medium-sized countries in terms of viewing time outside their domestic markets.
- No Bulgarian, Slovenian, Latvian or Lithuanian titles were measured.

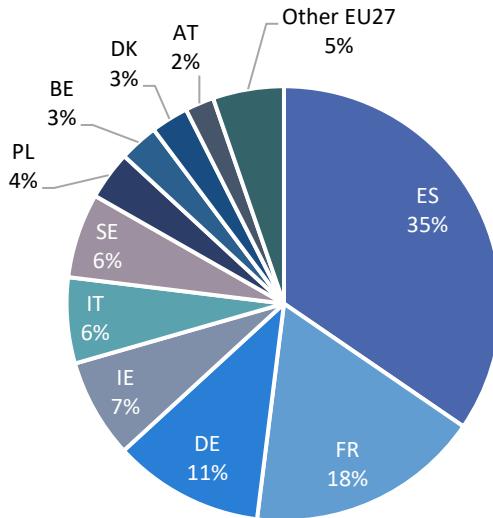


Source: OBS based on Digital i data

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

- The top 10 countries account for 95% EU non-national TV viewing time.
- Spain accounts for more than a third of the EU's non-national TV seasons viewing time while France accounts for only 18%.

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



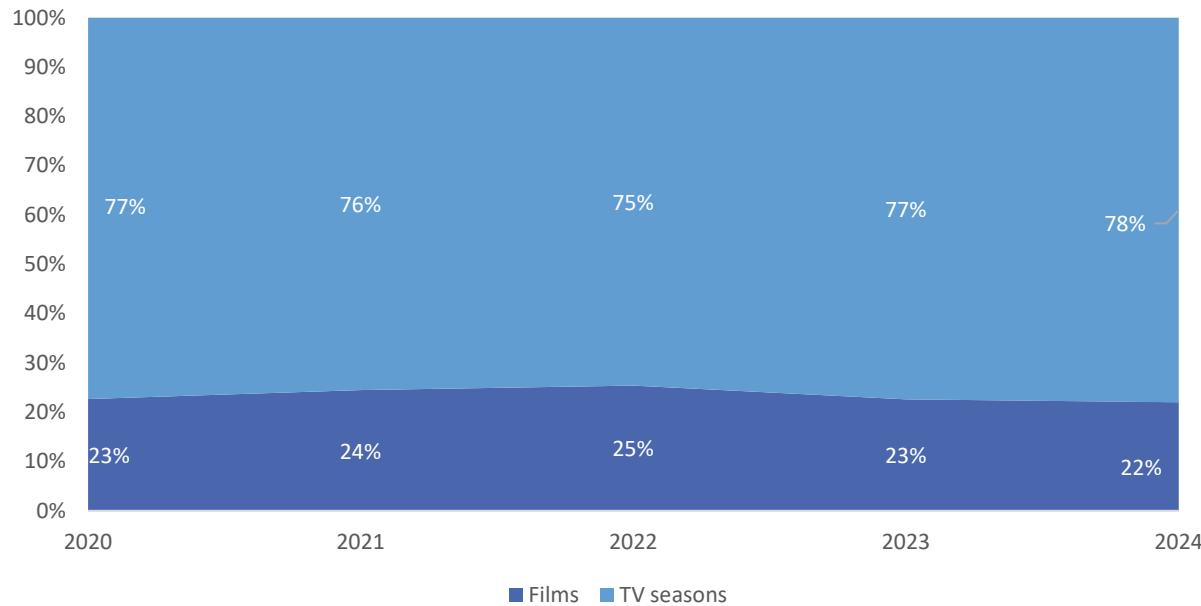
Source: OBS based on Digital i data

Part 2: The evolution of viewing time

Split between film and TV seasons remains stable

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

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

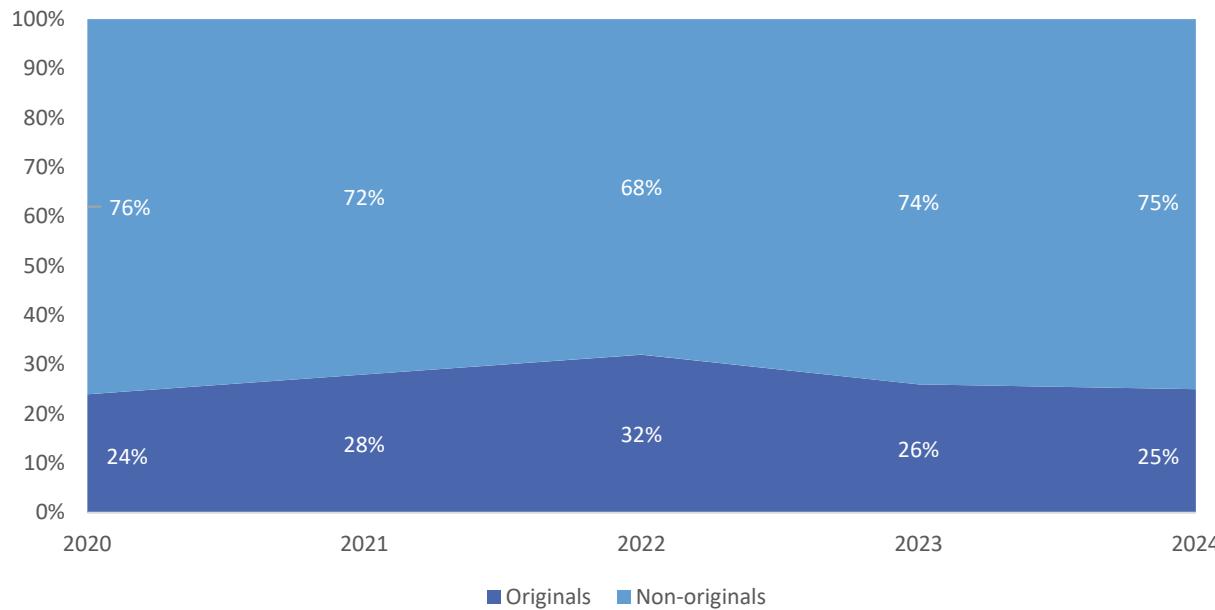


Source: OBS based on Digital i data

Films all origins - Relative stability of viewing time evolution

- After peaking in 2022, viewing time for originals fell almost back to its 2020 level in 2024.

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

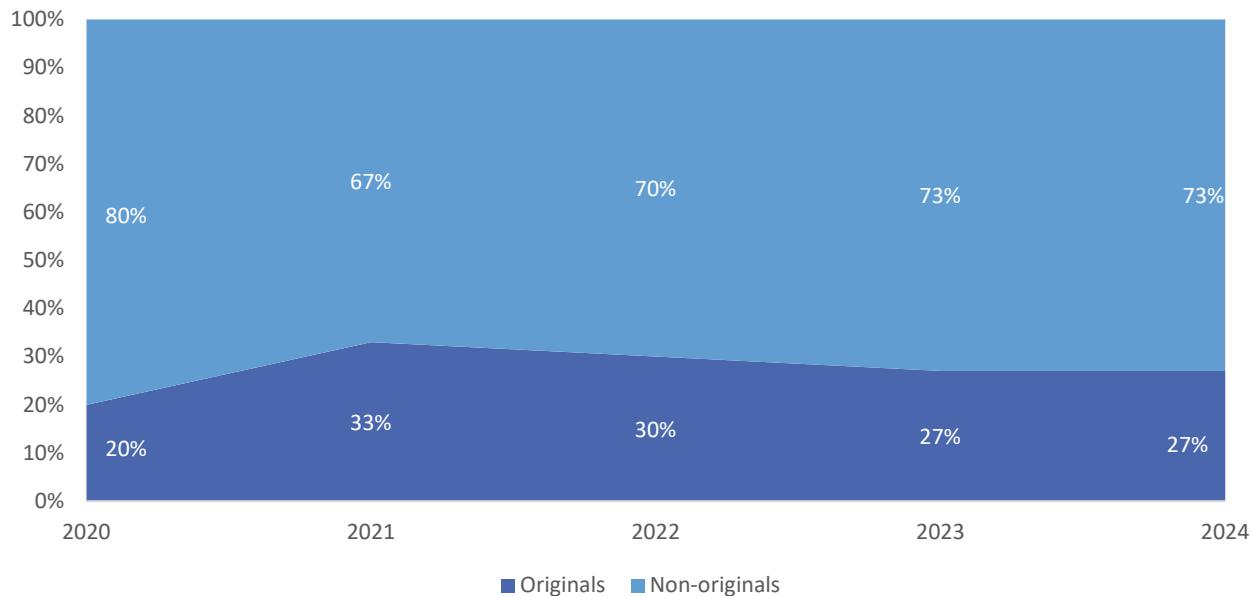


Source: OBS based on Digital i data

EU27 Film – Slow decline in originals titles from 2021 onwards

- After reaching a third of EU27 film viewing time in 2021, the share of originals gradually decreases to 27%.

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

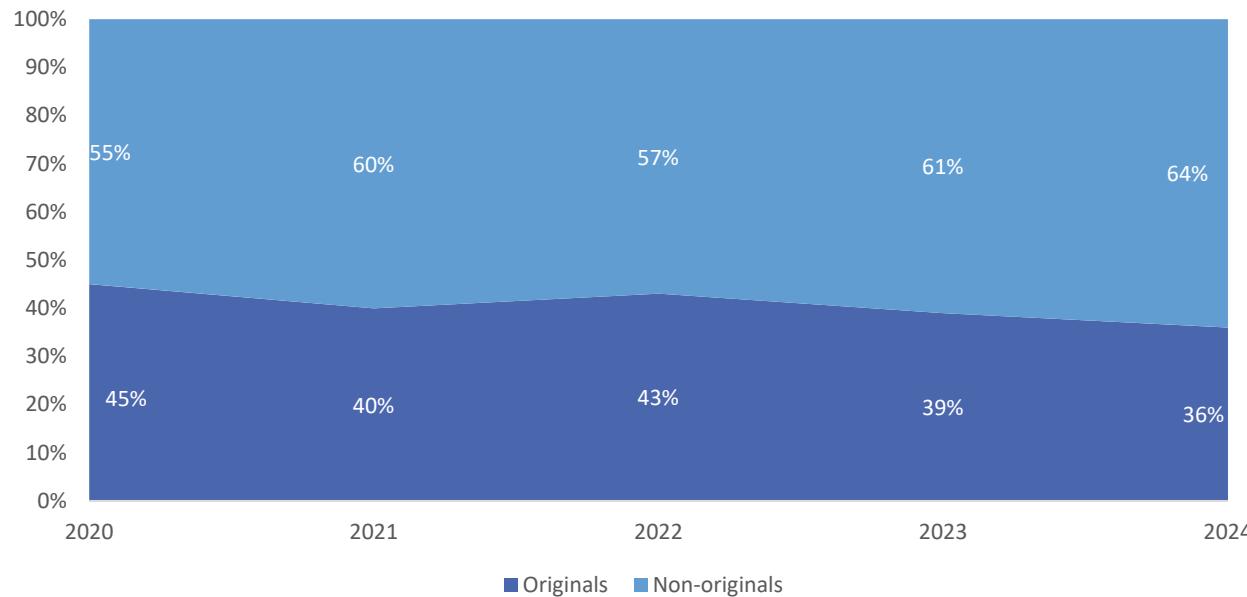


Source: OBS based on Digital i data

TV seasons all origins – Decrease in original viewing time over the time

- The proportion of original TV series from all origins falls from 45% in 2020 to 36% in 2024.

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

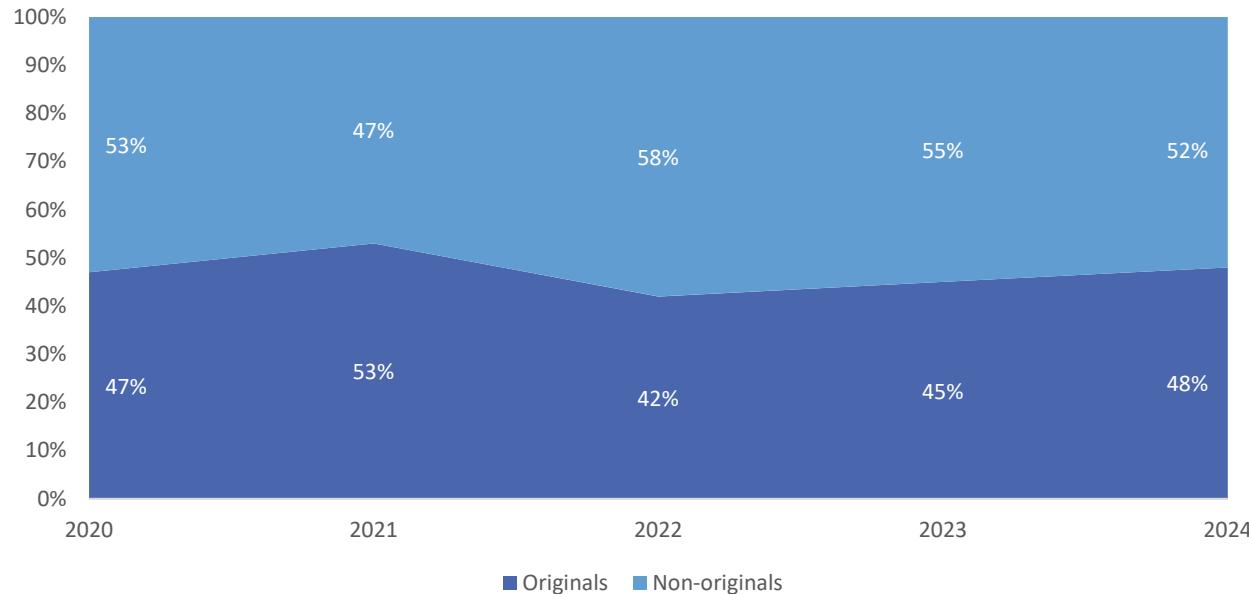


Source: OBS based on Digital i data

TV seasons EU27 – Originals back to their 2020 level

- After peaking at 53% in 2021, the EU27 share of original TV series almost returned to its 2020 level.

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

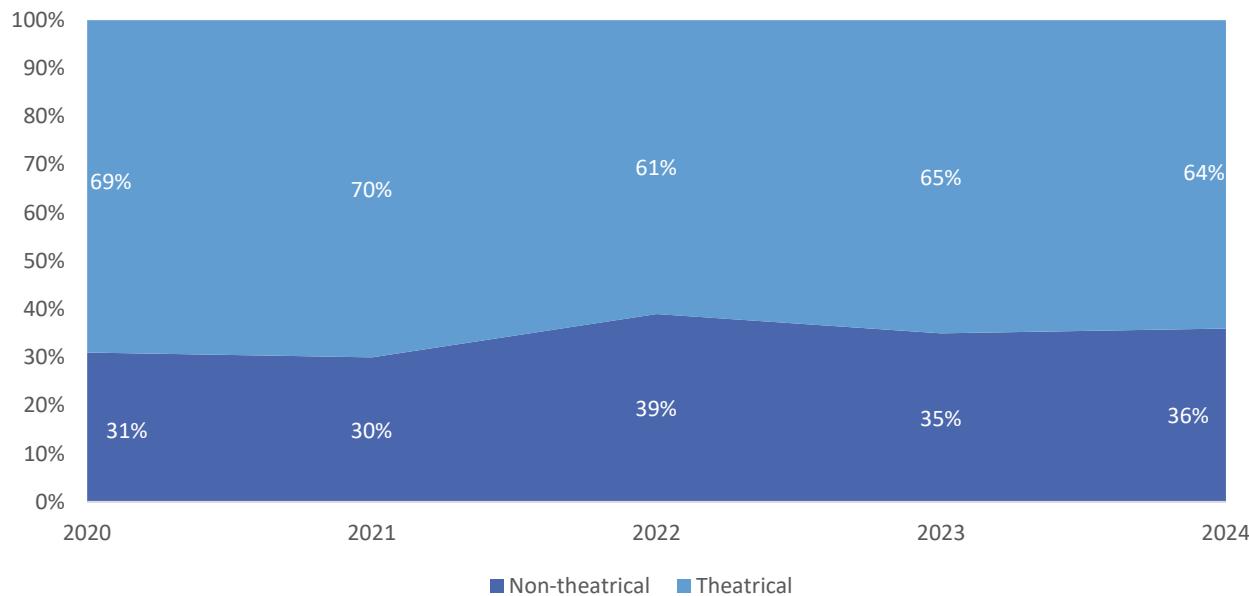


Source: OBS based on Digital i data

Time spent watching non-theatrical films on the rise

- Non-theatrical viewing time increases from 31% in 2020 to 36% in 2024.

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



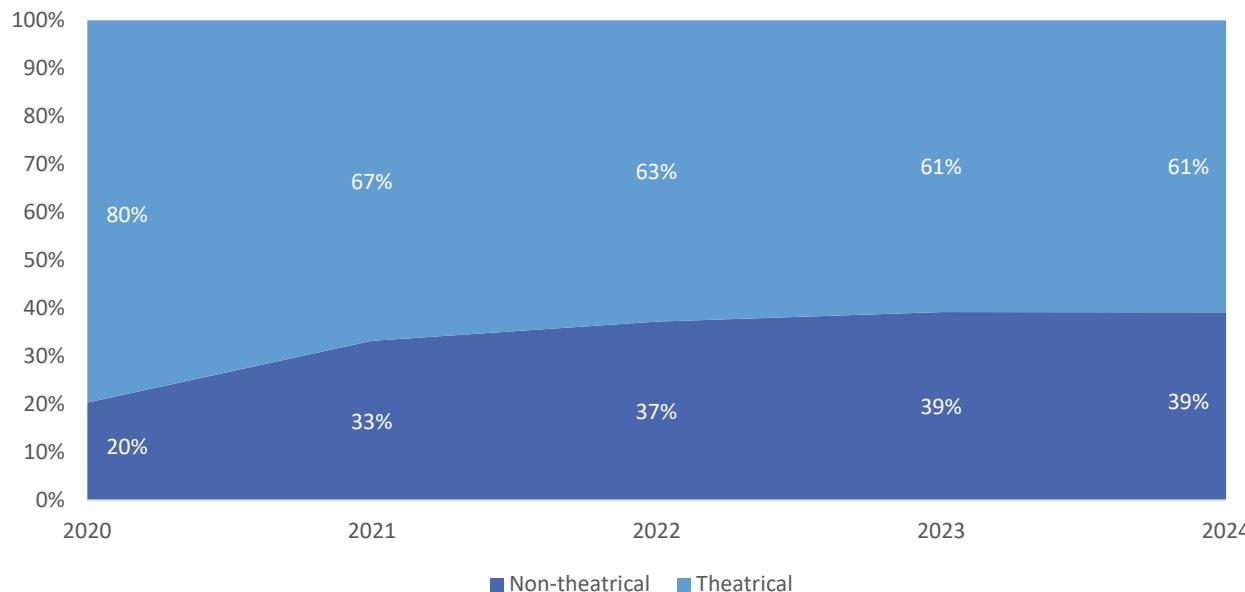
Source: OBS based on Digital i data

Strong increase in non-theatrical viewing time for EU27 films

- The viewing time of non-theatrical EU27 films rises sharply from 20% in 2020 to 39% in 2024.

Theatrical vs non-theatrical films - Evolution of viewing time

In % of total viewing time in hours, EU27 films

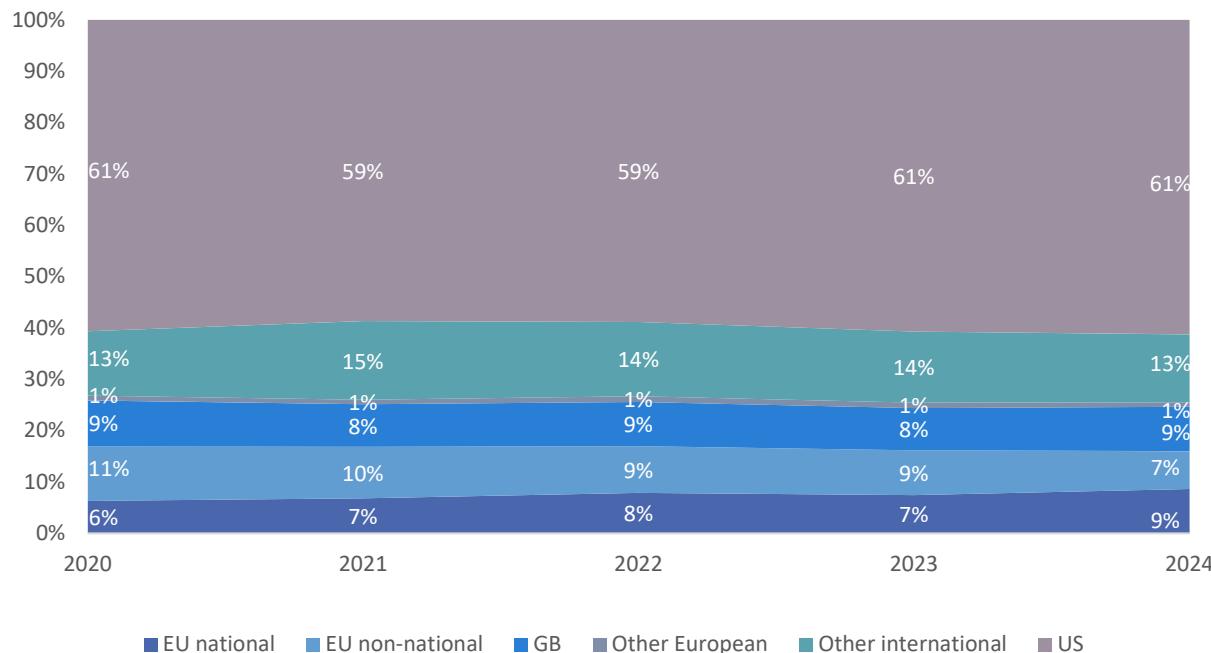


Source: OBS based on Digital i data

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

- While the viewing time of EU works remains stable, the share of national EU works increases from 6% to 9% over the period and the share of non-national EU works decreases from 11% to 7%.
- The shares of the US, GB, other European countries and other international countries remains stable worldwide.

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

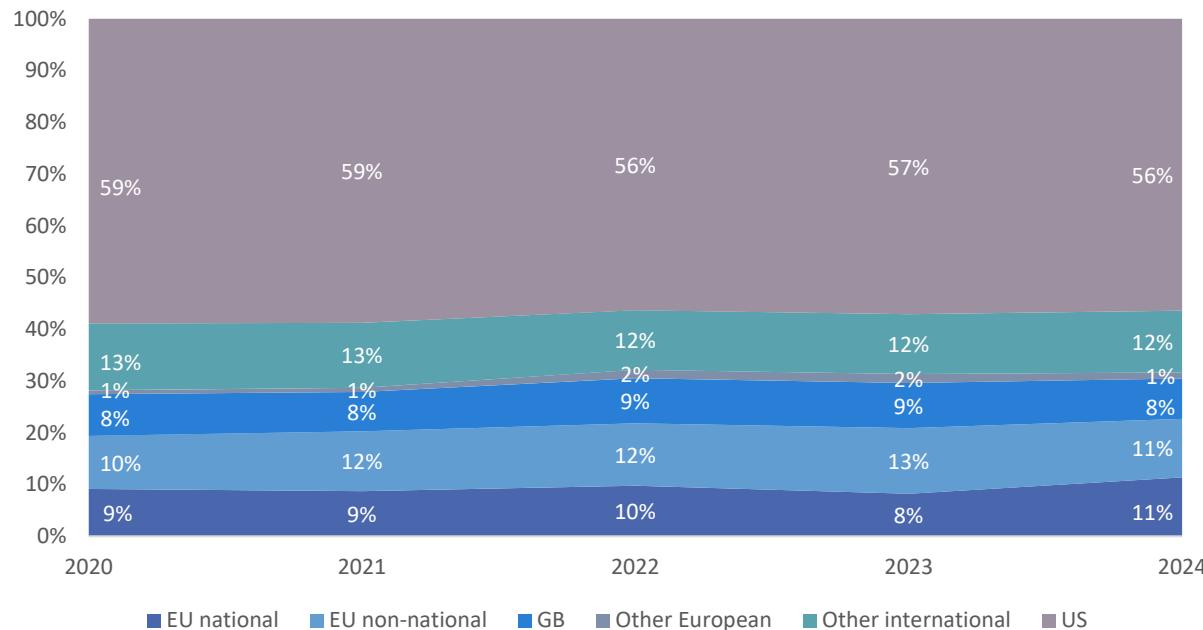


Source: OBS based on Digital i data

Increase in share of EU film viewing time, both national and non-national

- While the global share of European viewing time (EU national + EU non-national + GB + Other European) remains stable, the share of European films viewing time increases from 28% in 2020 to 32% in 2024, as the EU national share of viewing time increases from 9% to 11% and the EU non-national share also increases from 10% to 11% over the period.
- The US share of viewing time decreases slightly from 59% to 56%.
- GB, Other European and Other international shares remain stable.

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



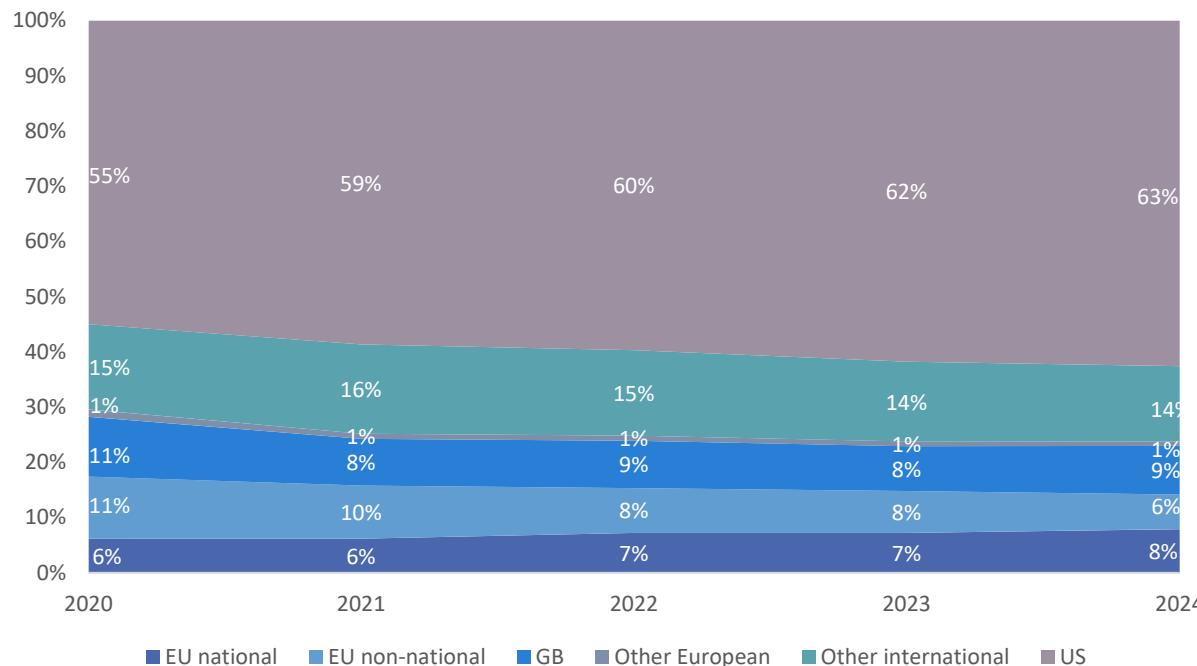
Source: OBS based on Digital i data

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

- In terms of TV seasons, the share of European TV seasons decreases from 30% in 2020 to 24% in 2024 as the EU non-national and GB viewing time decreases from 11% to 6% and 9% respectively.
- The EU national share of viewing time increases slightly from 6% to 8% over the period.
- Meanwhile, the US share of viewing time increases from 55% to 63%.

Evolution of viewing time of TV seasons by origin

In % of total viewing time in hours

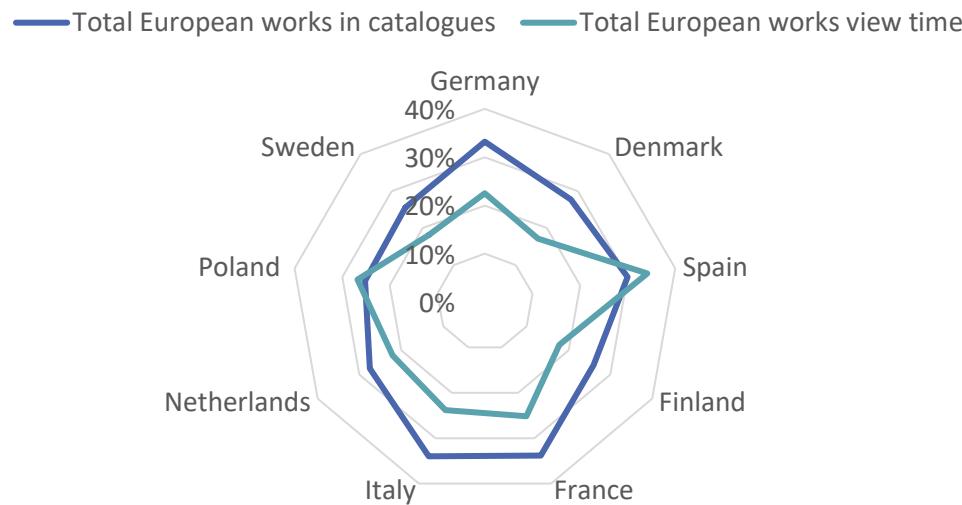


Source: OBS based on Digital i data

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

European content viewed less than its share of the catalogue in 7 countries

- In the sample, European content (EU national + EU non-national + GB + Other European) represents 30% of the sample catalogue but only 25% of consumption.
- Germany and Denmark are the countries where the gap between viewing and catalogue is the widest (-11 p.p. vs. catalogue).
- Poland and Spain are the only countries where European content is watched more than its share of the catalogue (+4 p.p. vs. catalogue and +2 p.p. vs. catalogue respectively).

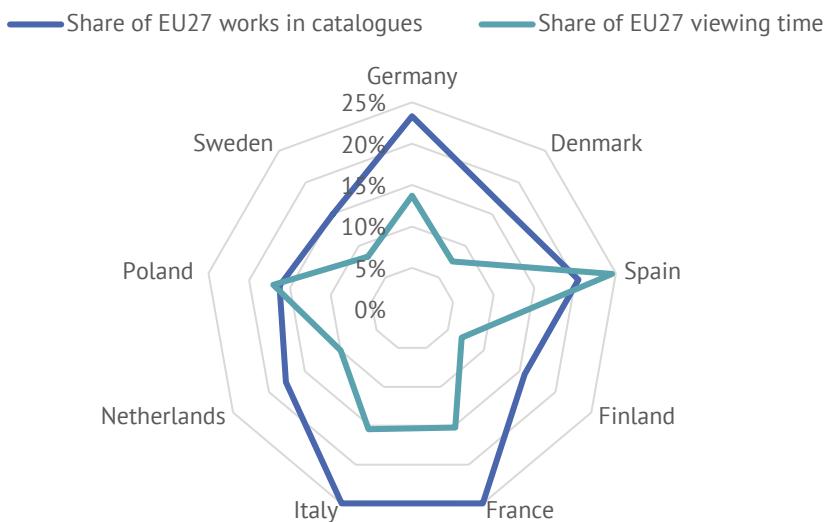


Viewing time vs share of works in catalogue
In total viewing time in hours and number of works, EU9

Source: OBS based on Digital i data

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

- In the sample, EU27 content (EU national + EU non-national) represents 22% of the sample catalogue but only 16% of consumption.
- Germany, France and Denmark are the countries with the largest gap between viewing and catalogue (-10 p.p. vs. catalogue).
- Poland and Spain are the only countries where EU27 content is watched more than its share of the catalogue (+1 p.p. vs catalogue and +4 p.p. vs. catalogue respectively).



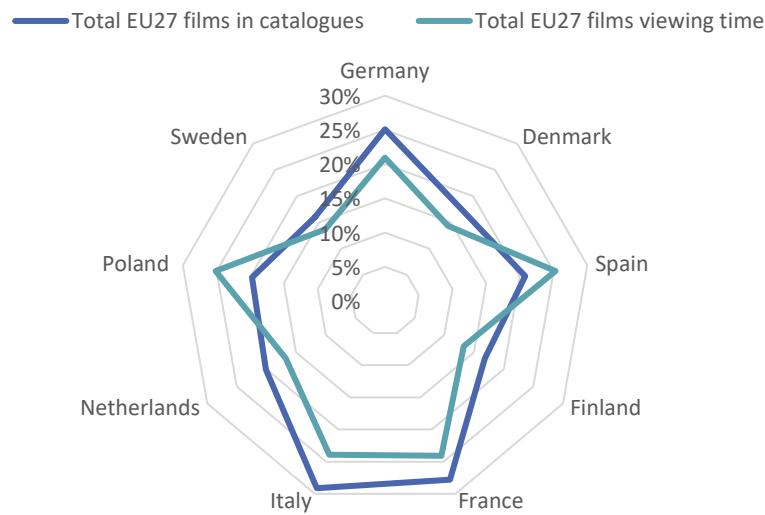
Viewing time vs share of works in catalogue

In total viewing time in hours and number of works, EU9

Source: OBS based on Digital i data

EU27 films viewed less than their share of the catalogue in 7 countries

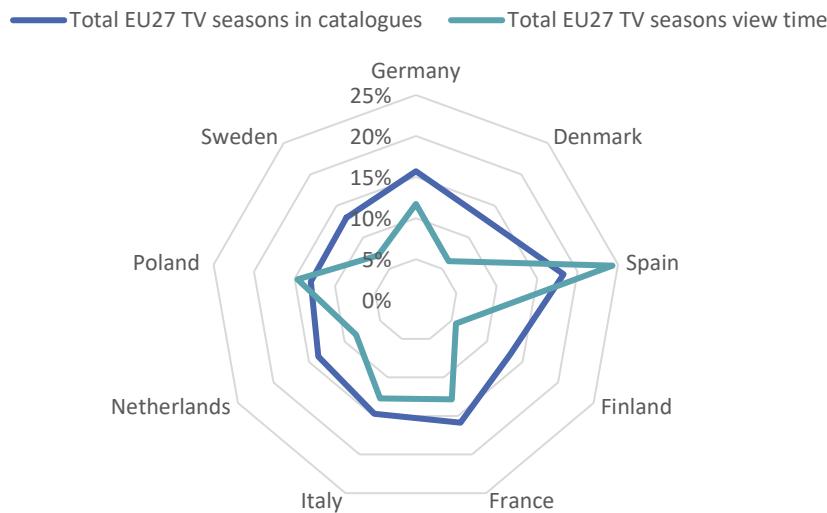
- In the sample, the share of EU27 films in consumption (23%) is slightly higher than their share in the catalogue (22%).
- Poland and Spain are the only countries where European content is watched more than its share in the catalogue (+5 p.p. vs. catalogue and +4 p.p. vs. catalogue respectively).
- Italy is the country where the gap between viewing and catalogue is the widest (-5 p.p. vs. catalogue).



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

EU27 TV seasons viewed less than its share in catalogue in 7 countries

- In the sample, European TV seasons share of viewing time (14%) is below its share in catalogue (15%).
- Poland and Spain are the only countries where European content is watched more than its share of the catalogue (+2 p.p. vs catalogue and +6 p.p. vs catalogue respectively).
- Finland is the country where the gap between viewing and catalogue is the widest (-8 p.p. vs catalogue).

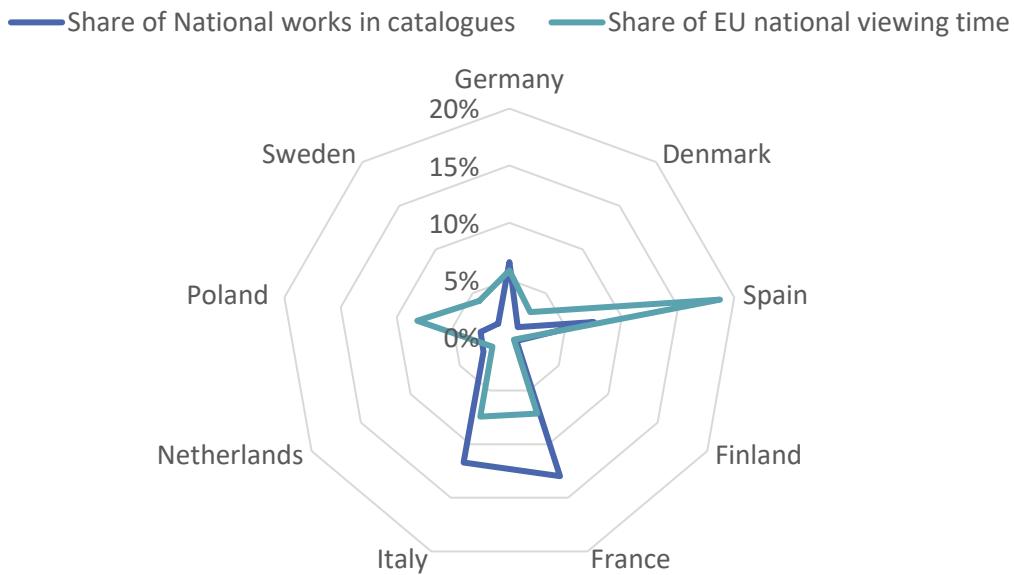


TV seasons - viewing time vs share of works in catalogue
In total viewing time in hours and number of works, EU9

Source: OBS based on Digital i data

National content viewed more than its share in the catalogue in 4 out of 9 countries

- Consumption of national content is higher than its share in the catalogue (9% vs 6%).
- Poland, Spain, Sweden and Denmark are the four countries where national content is consumed more than its share in the catalogue.
- Spain is the country where national content is consumed the most compared to its share in the catalogue (+11 p.p.).



Viewing time vs share of works in catalogue

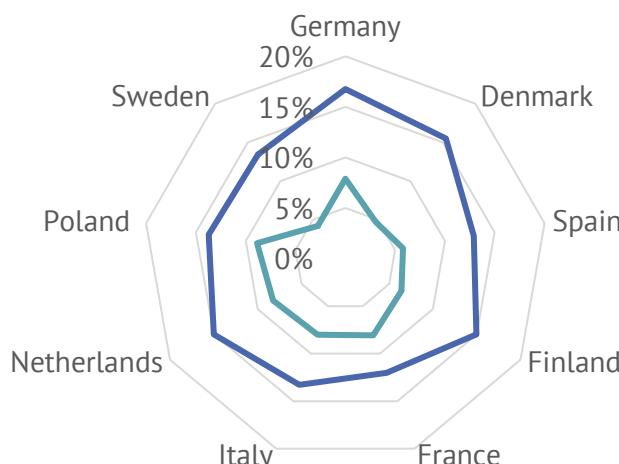
In total viewing time in hours and number of works, EU9

Source: OBS based on Digital i data

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

- EU non-national content represents 14% of the catalogue in the sample, but only 7% of consumption.
- European non-national content is less watched in all countries in the sample.
- Denmark is the country where EU non-national content is consumed the least compared to its share in the catalogue (-11 p.p.).
- France is the country where the gap between consumption of EU non-national and catalogue content is the smallest (-4 p.p.).

— Share of EU non-national works in catalogues — Share of EU non-national viewing time



Viewing time vs share of works in catalogue

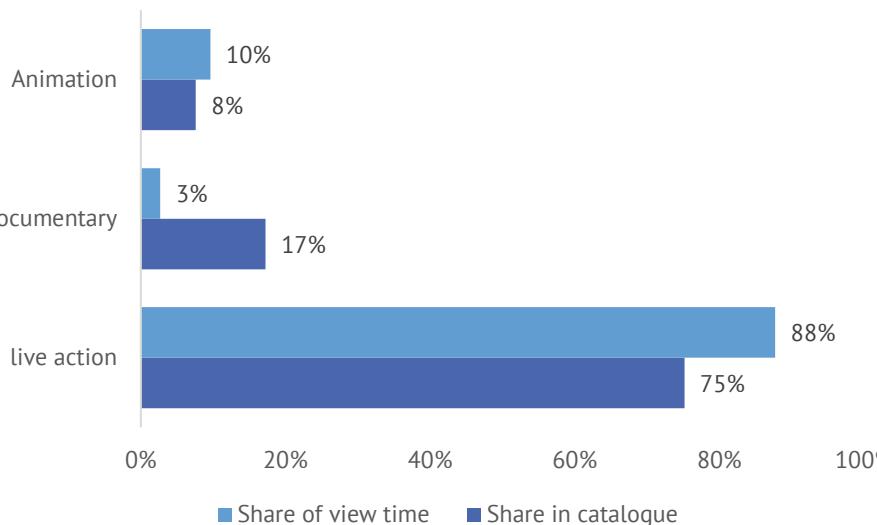
In total viewing time in hours and number of works, EU9

Source: OBS based on Digital i data

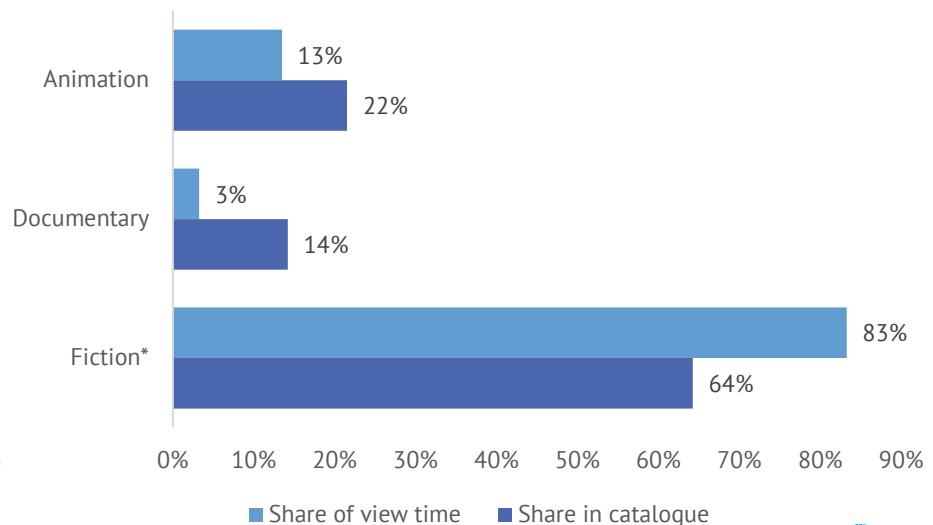
Live-action and fiction TV more watched than their catalogue share

- Animation and live-action films are consumed more than their share in the catalogue (+2 p.p. and +13 p.p. respectively).
- Documentaries are consumed less than their share in the catalogue (-14 p.p.).
- Fiction TV is consumed much more than its share in the catalogue (+19 p.p.).
- Documentary and animation TV series are consumed less than their share in the catalogue (-11 p.p. and -9 p.p. respectively).

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



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



Source: OBS based on Digital i data

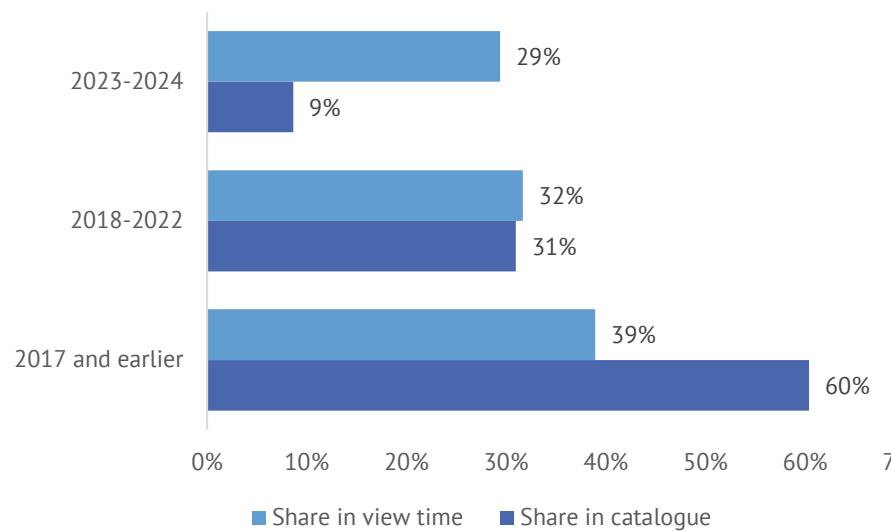
*Titles that were neither classified as 'Animation' nor 'Documentary'.

9% of films in catalogues account for 29% of film viewing time

- While catalogue films account for over 60% of all films available in catalogues, they account for only 39% of viewing time for all films and 27% of viewing time for EU27 films.
- Recent films, produced in 2023-2024, account for over 29% of viewing time for all films and up to 40% for EU27 films, but only for 9% of all films and for 7% of EU27 films.

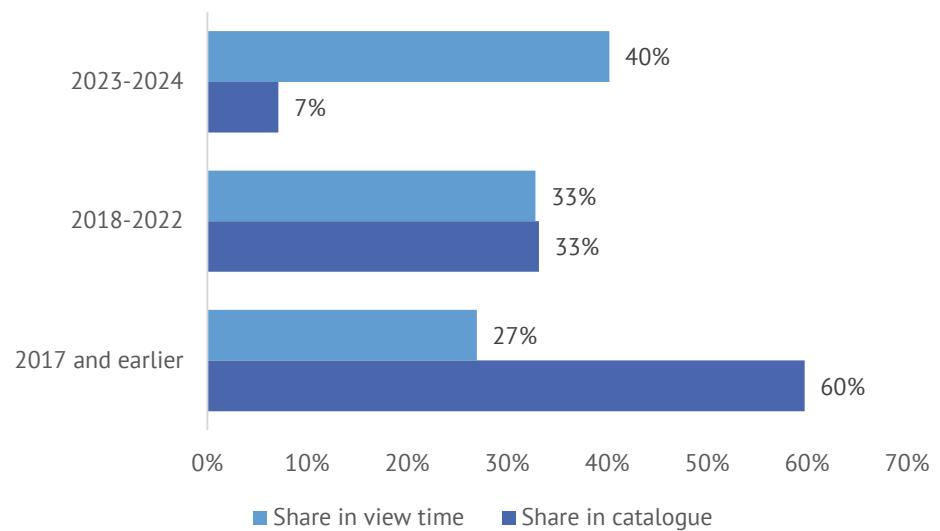
All films - Split of viewing time and share in catalogues by year of production

In % of total viewing time in hours and total films in catalogues, EU9



EU27 films - Split of viewing time and share in catalogues by year of production

In % of total viewing time in hours and total films in catalogues, EU9

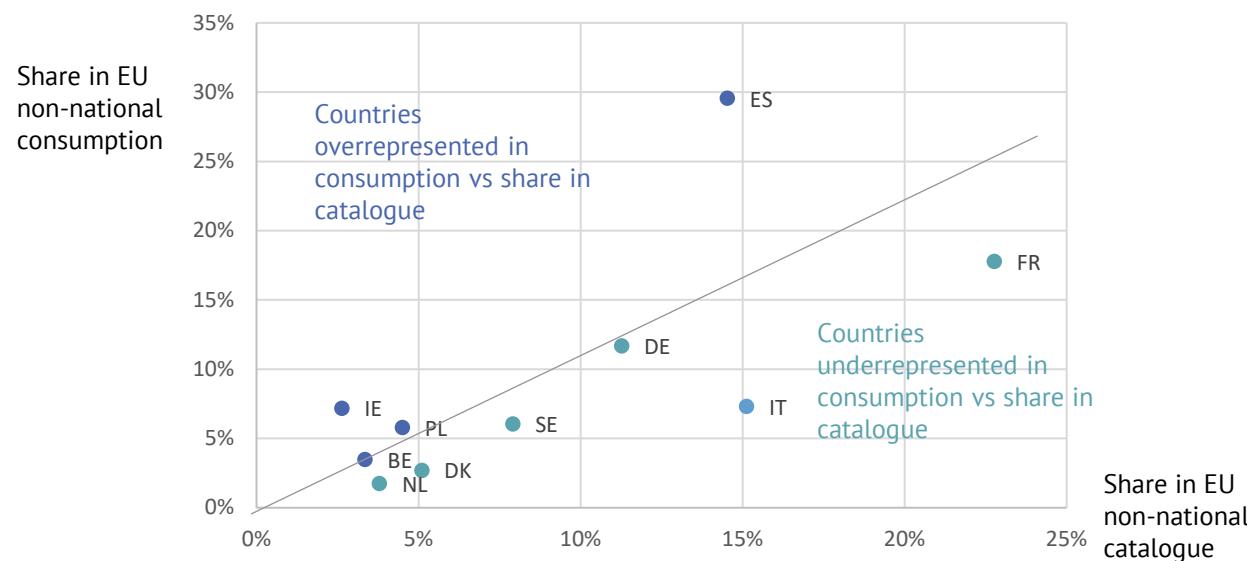


Source: OBS based on Digital i data

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

- A minority of EU countries have a higher share of viewing time than their share of SVOD catalogues (ES, IE, PL, BE).
- France and Italy are two major producing countries whose share of consumption is significantly lower than their share of catalogues (18% of consumption against 23% of catalogue for France and 7% of consumption against 15% of catalogue for Italy).

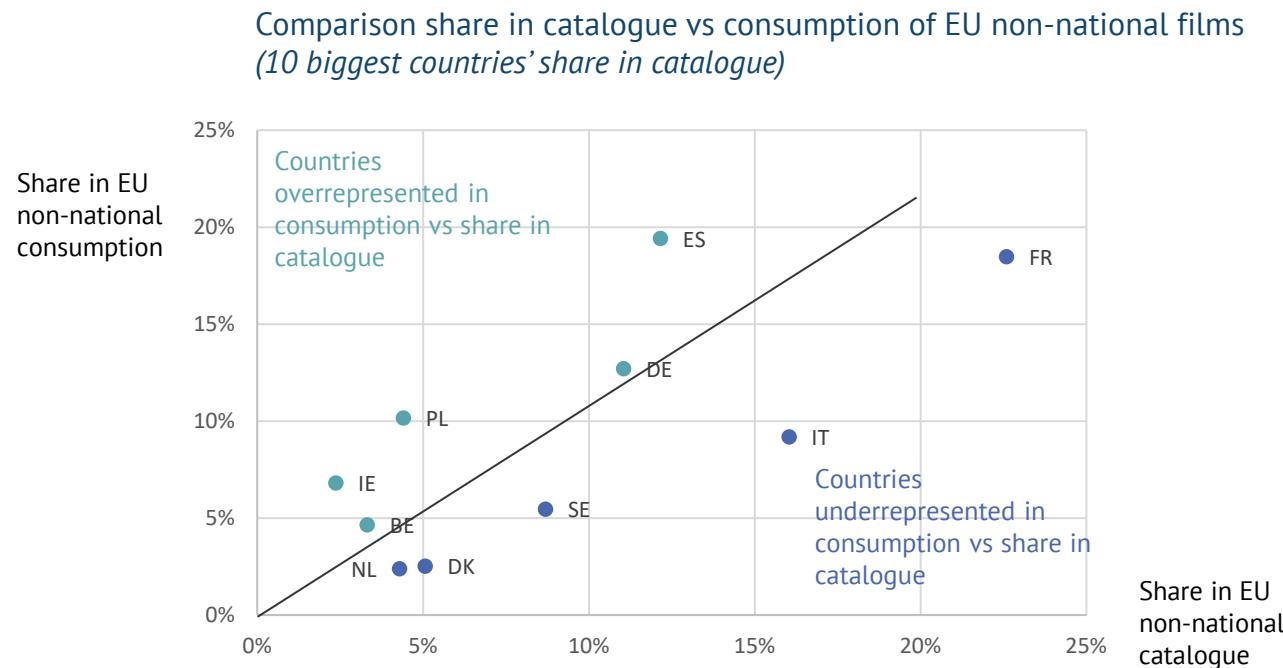
Comparison share in catalogue vs consumption of EU non-national content
(10 biggest countries' share in catalogue)



Source: OBS based on Digital i and JustWatch data

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

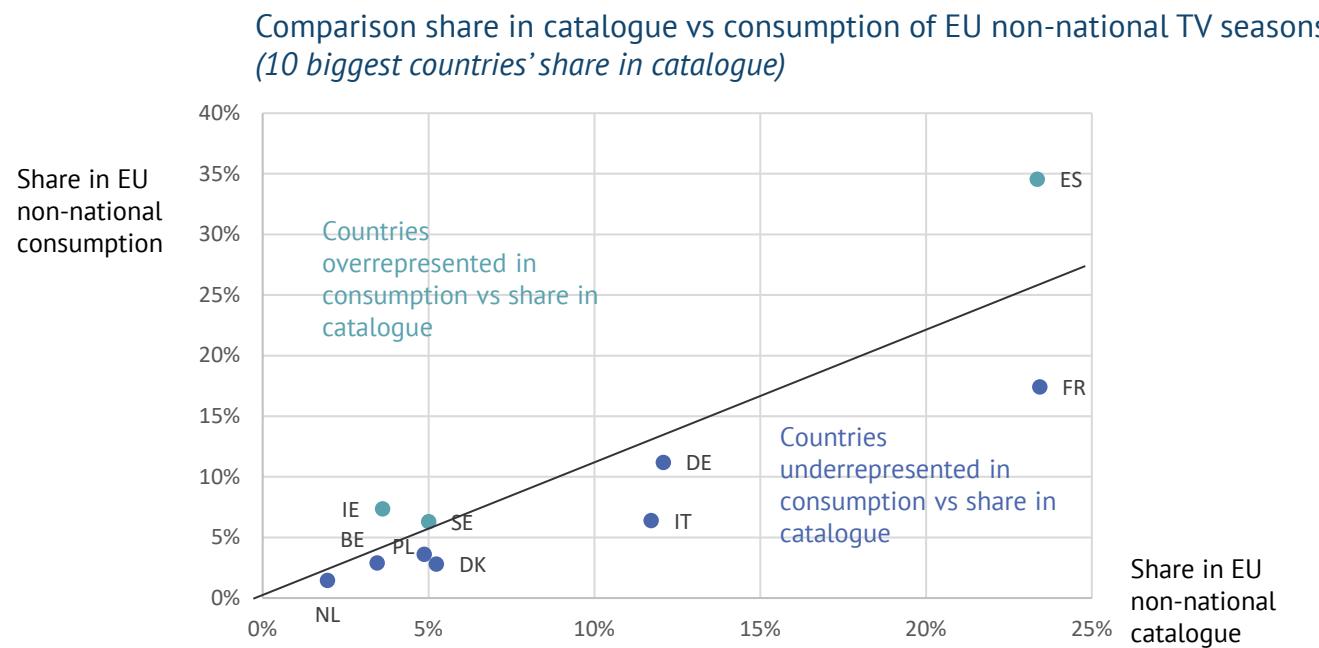
- 5 EU countries have a higher share of viewing time for EU non-national films than their share of viewing time for EU non-national films in SVOD catalogues (ES, DE, BE, IE, PL).
- 5 EU countries have a higher share of non-national EU films in SVOD catalogues than their share of viewing time for non-national EU films (FR, IT, SE, DK, NL).



Source: OBS based on Digital i and JustWatch data

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

- 3 EU countries have a higher share of viewing time for non-national EU TV seasons than their share of non-national EU TV seasons in SVOD catalogues (ES, IE, SE).
- 7 EU countries have a higher share of non-national EU TV seasons in SVOD catalogues than their share of viewing time for non-national EU films (FR, IT, DE, PL, DK, NL, BE).



Source: OBS based on Digital i and JustWatch data

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

- Spain and Ireland are the two countries whose content generates the most viewing time relative to their share of the catalogue in 2020-2024.
- The Netherlands, Italy and Sweden are the three countries whose content generates the least viewing time relative to their share of the catalogue in 2020-2024.

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

Origin	2020	2021	2022	2023	2024
FR	0,41	0,82	0,60	0,97	0,78
ES	2,13	2,24	2,05	1,80	2,03
DE	1,09	1,11	1,19	1,16	1,04
IT	0,46	0,43	0,55	0,43	0,48
PL	2,44	1,06	1,89	1,58	1,28
SE	0,65	0,38	0,64	0,58	0,76
IE	2,58	2,89	2,43	1,74	2,73
NL	0,39	0,72	0,85	0,56	0,46
BE	1,27	1,26	1,11	1,35	1,04
DK	0,99	0,84	1,00	0,75	0,53

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

Source: OBS based on Digital i and JustWatch data

- Thanks to the success of *365 Days* and its sequel *365 Days: This Day*, Poland gets the best ratios in 2020-2024.

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

Origin	2020	2021	2022	2023	2024
FR	0.84	0.97	0.86	0.97	0.82
ES	1.39	1.36	1.67	1.73	1.60
DE	1.33	2.01	1.18	1.43	1.15
IT	0.61	0.47	0.48	0.44	0.57
PL	6.68	1.36	2.97	2.53	2.31
SE	0.31	0.37	0.46	0.48	0.63
IE	0.80	1.02	1.08	0.90	2.88
NL	0.29	1.15	1.27	1.01	0.56
BE	2.26	2.00	1.31	1.24	1.40
DK	0.61	0.39	0.99	0.79	0.50

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

Source: OBS based on Digital i and JustWatch data

- Thanks to the international success of *Money Heist* and *Vikings*, Spain and Ireland get the best ratio in 2020-2024.

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

Origin	2020	2021	2022	2023	2024
FR	0.29	0.72	0.52	0.97	0.74
ES	2.00	1.57	1.33	1.27	1.48
DE	1.39	0.72	1.07	0.94	0.93
IT	0.77	0.85	0.89	0.55	0.55
PL	1.13	1.31	1.50	0.99	0.74
SE	0.52	0.66	1.35	1.15	1.26
IE	2.05	2.08	1.71	1.44	2.04
NL	0.71	0.58	1.08	0.57	0.73
BE	0.73	0.72	0.96	1.44	0.84
DK	0.74	0.71	0.74	0.61	0.53

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

Source: OBS based on Digital i and JustWatch data

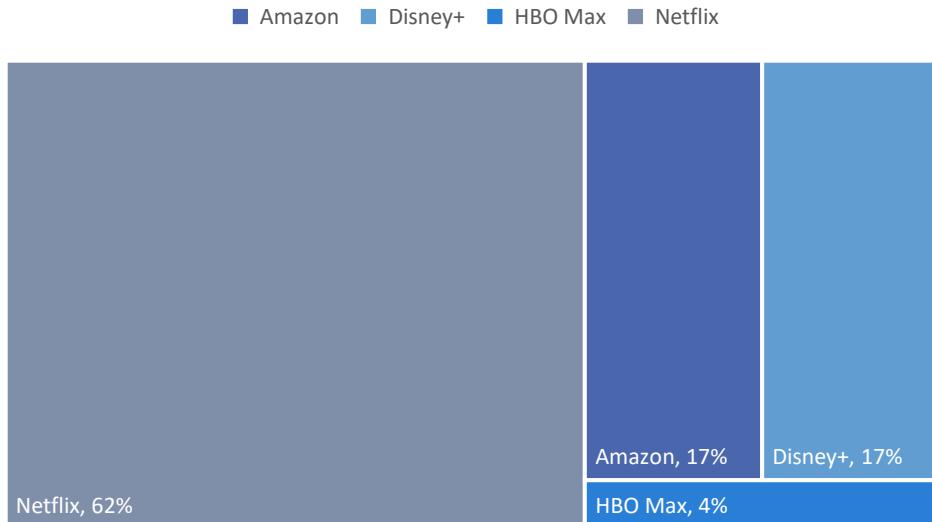
Appendix

Netflix accounts for more than half of viewing time

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

Split of total viewing time by provider

In share of total viewing time Jan.2024 – Sept. 2024



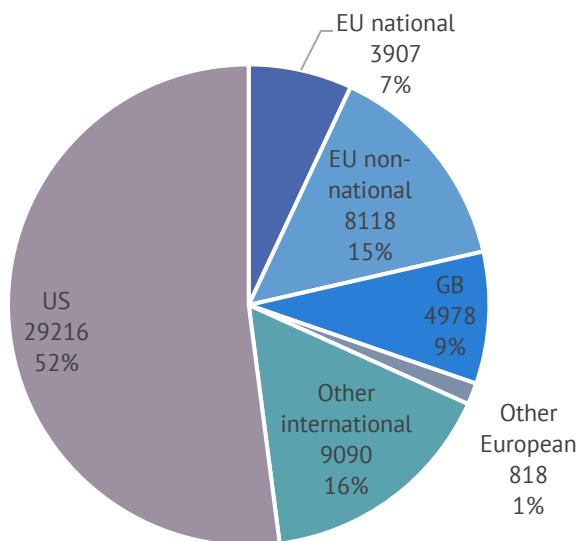
SVOD services	DE	DK	ES	FI	FR	IT	NL	PL	SE
Netflix	X	X	X	X	X	X	X	X	X
Amazon	X	X	X	X	X	X	X	X	X
Disney+	X	X	X	X	X	X	X	X	X
HBO Max			X	X	X		X	X	X

Source: OBS based on Digital i data

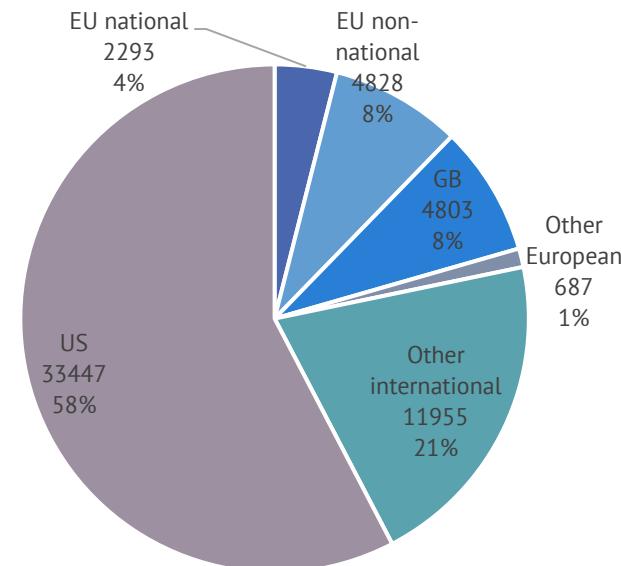
The sample of works measured by region of origin

- European films account for 32% of all films in the sample of films measured on SVOD and European TV series for 21% of all TV series available.
- The share of European films measured is in line with their share in SVOD catalogues (32%) and the share of European TV seasons is quite close to their share in catalogues (23%).
- US films are slightly over-represented in the sample compared to their share in catalogues and much more so for TV seasons.

Origin of 56 127 films in the sample by country of origin
In number of films



Origin of 58 013 TV seasons in the sample by country of origin
In number of TV seasons

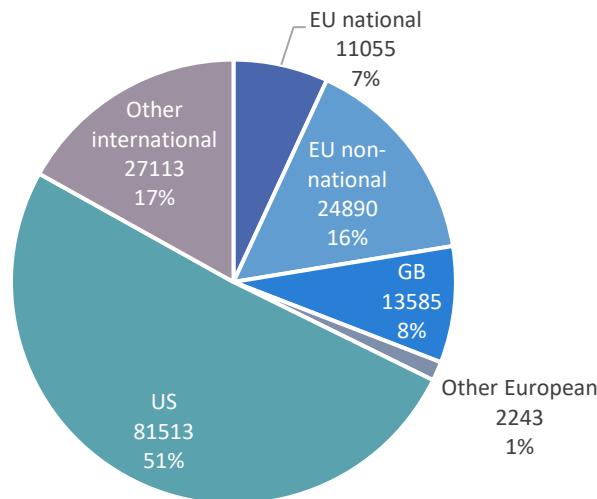


Source: OBS based on Digital i data

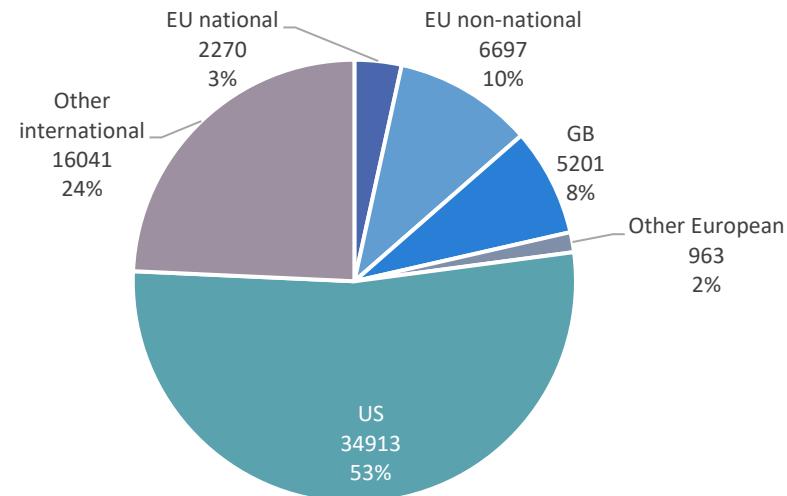
Composition of film and TV season catalogues by region of origin

- These data show the origin of films and TV seasons in SVOD catalogues in June 2024.
- European works account for 32% and 23% of film and TV season catalogues respectively in June 2024. 51% of film catalogues and 53% of TV season.
- 51% of the film catalogues and 53% of the TV season catalogues are produced in the US, while 17% of all films and 24% of TV seasons are produced in other world regions.

Origin of 160 399 films in the catalogues
by country of origin
In number of films



Origin of 66 085 TV seasons in the catalogues
by country of origin
In number of TV seasons

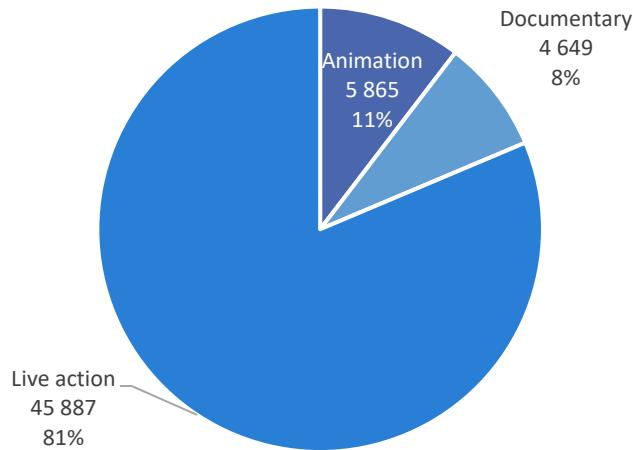


Source: OBS on JustWatch data

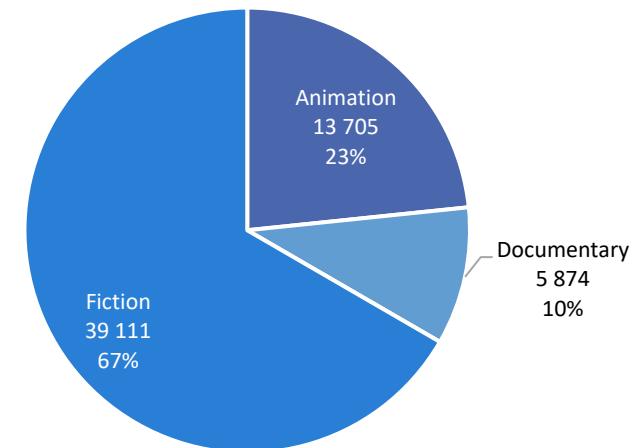
The sample of works by genre

- In terms of genres, live-action films (all fiction films not classified as animation or documentary) and fiction TV make up the majority of the works in the sample with 81% and 67% respectively.
- Animation accounts for 11% of the films in the sample and 23% of the TV seasons.
- Documentaries represent 8% of the films and 10% of the TV seasons in the sample of works measured.

Genre of 56 401 films in the sample
In number of films



Genre of 58 690 TV seasons in the sample
In number of TV seasons



Source: OBS based on Digital i

Measured works

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

Number of works included in SVOD viewing time data
Jan. - Sept. 2024, by country

Country	Film	TV	Grand Total
Germany	8 749	8 220	16 969
Denmark	3 768	5 191	8 959
Spain	8 911	8 272	17 183
Finland	3 251	4 585	7 836
France	7 219	6 892	14 111
Italy	8 837	6 559	15 396
The Netherlands	5 570	6 193	11 763
Poland	5 544	6 561	12 105
Sweden	4 864	6 557	11 421
Grand Total	56 713	59 030	115 743

Source: OBS based on Digital i data

More information:

www.obs.coe.int

Christian.Grece@coe.int

Jean-Augustin.Tran@coe.int

