Netherlands

Netherlands: key data 2025

Population (m)	18.3
TV households (m)	8.0
Consumer spending on total video (€m)	2,005.2
Comparison with 2024	18.5%
Consumer spending on digital video and TV VoD (€m)	1,995.9
Comparison with 2024	18.8%
Consumer spending on physical video software (€m)	9.2
Comparison with 2024	-17.7%

Consumer spending on total video (€m) - Total Europe	35,795
Comparison with 2024	13.3%
Consumer spending on digital video and TV VoD (€m) - Total Europe	35,076
Comparison with 2024	14.4%
Consumer spending on physical video software (€m) - Total Europe	719.5
Comparison with 2024	-21.0%

Netherlands key commentary

The Dutch film and audiovisual market continued its positive momentum in 2025, with consumer spending rising by 18,5% compared to 2024. Total spending on video reached EUR 2.005 billion, reflecting solid growth. While attendance in Dutch cinemas declined slightly compared to 2024, audiences continued to embrace a broad and increasingly diverse range of films and cinema experiences. The market reflected changing consumer behavior, with visitors becoming more selective in their film choices and placing greater value on premium experiences, special screenings, events, and the communal nature of cinema-going.

Online distribution

The online distribution of films and audiovisual content, including subscription and transactional VOD (SVOD and TVOD), generated EUR 1.996 billion in consumer spending in 2025, an increase of 18,8% compared to 2024. SVOD remained the preferred access format, responsible for the largest share of online video consumption, with subscription revenues growing by 20,1% in 2024 to about EUR 1.883 billion. This is a positive result, but the growth trend is stabilizing compared to previous years. Leading SVOD services are Netflix, Videoland, and Disney+.

The online transactional market (TVOD) remained stable, with spending around EUR 87 million. This is similar to the spending in 2024. TVOD remains a relatively small market in the Netherlands compared to SVOD. Leading TVOD services are Pathé Thuis, Prime Video, and YouTube.

Physical market

Sales of films and audiovisual content on DVD and Blu-ray experienced a substantial decline in consumer spending to EUR 9.2 million, a decrease of 17,7% compared to 2024. This decline trend is similar to the previous year and marks the rapid contraction of the physical market, which now constitutes less than 0,5% of the total home entertainment market spendings.

Future

The Dutch audiovisual market continues to evolve as consumers increasingly combine theatrical and at-home viewing experiences. While SVOD remains the largest segment of the home entertainment market, growth is expected to moderate as the market reaches a higher level of maturity. Consumers are becoming more selective in their subscriptions, seeking greater value, exclusive content, and flexible viewing options. This may lead streaming services to further diversify their business models through advertising-supported tiers, bundled offerings, and high-end streaming series.

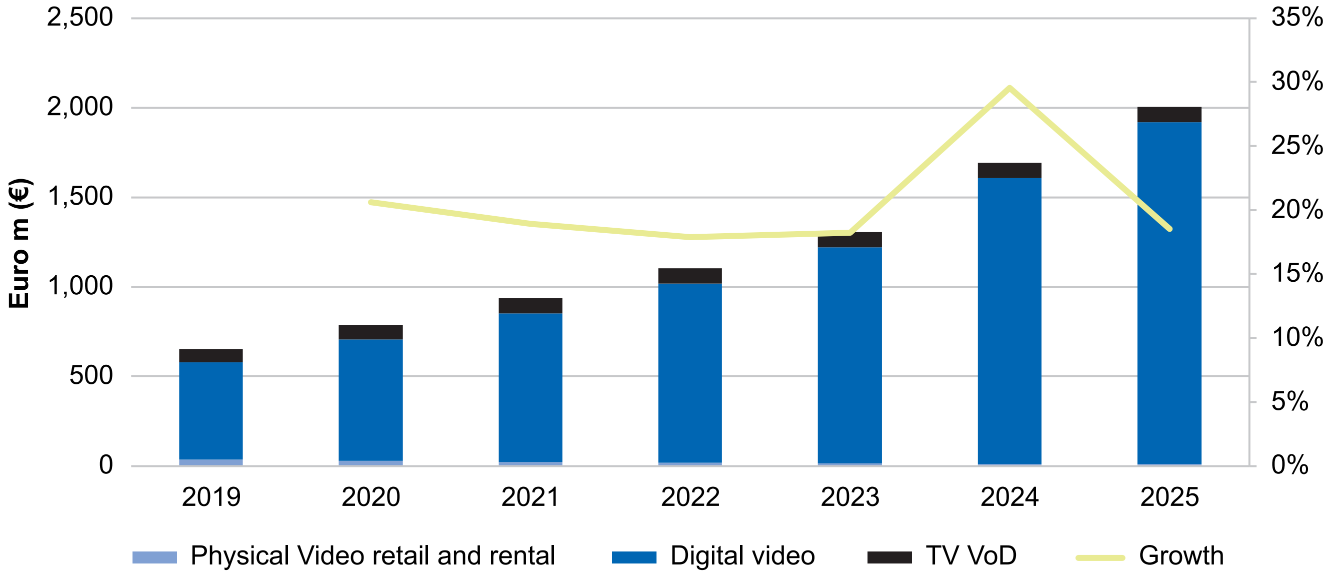
TVOD continues to provide a complementary alternative for audiences who prefer to pay for specific titles rather than committing to multiple subscriptions. Although the transactional market remains smaller than SVOD, it benefits from consumers' increasing willingness to selectively choose content and pay for premium releases, particularly major film launches and locally produced content. Overall, the Dutch film and audiovisual sector remains vibrant, thanks to a diverse range of films and cinema experiences, and national SVOD and TVOD platforms.

This commentary was provided by NVPI film, the Dutch association for film distributors.

Video market: Netherlands

	2019	2020	2021	2022	2023	2024	2025	24/25
GENERAL								
Population (m)	17.5	17.6	17.7	17.9	18.1	18.2	18.3	0.6%
TV households (m)	7.6	7.7	7.6	7.7	7.8	7.9	8.0	0.8%
Population Total Europe (m)	638.1	638.8	638.7	640.6	642.5	642.2	640.9	-0.2%
TV households Total Europe (m)	258.5	259.6	259.4	260.4	262.9	264.1	264.5	0.2%
Broadband households (m)	6.6	6.7	6.8	6.9	7.0	7.0	7.1	1.2%
Nominal GDP (EUR m)	810.2	792.1	814.1	855.2	881.5	908.7	936.5	3.1%
Consumer price index (100 in 2010)	106.8	109.4	113.0	115.5	121.5	127.6	131.7	3.2%
DVD Video player/recorder penetration (%)	26.9	23.7	21.2	18.8	16.7	14.9	13.5	-9.0%
Blu-ray Disc player/recorders penetration (%)	19.0	18.4	17.9	17.1	16.4	15.9	15.5	-2.9%
DVD Video player/recorder Total Europe (%)	60.9	58.7	56.8	54.8	52.6	50.9	48.8	-4.1%
Blu-ray Disc player/recorders penetration Total Europe (%)	22.3	21.6	21.0	20.2	19.4	18.7	18.2	-3.1%
OTT Subscriptions (m)	5.2	7.3	8.6	11.1	12.9	13.6	14.6	7.0%

Consumer spending by segment



Total video software market

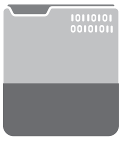
	2019	2020	2021	2022	2023	2024	2025	24/25
CONSUMER LEVEL ALL VIDEO								
Total market figures include consumption of both physical and digital video								
Total spending on video (EUR m)	653.3	787.8	937.0	1,104.5	1,305.9	1,691.6	2,005.2	18.5%
Growth (%)		20.6%	18.9%	17.9%	18.2%	29.5%	18.5%	
Total spending on video Total Europe (EUR m)	13,405.6	17,667.2	21,515.8	24,335.6	27,508.5	31,585.1	35,795.1	13.3%
CONSUMER LEVEL DIGITAL VIDEO (OTT) – TOTAL SPENDING								
The purchase or rental of films and TV series delivered over the open internet. Digital retail numbers include purchase of content on pay TV set-top-boxes where applicable. This category specifically excludes sports, live events and adult content to ensure it is comparable to physical video data..								
Retail digital video (EUR m)	11.5	13.0	13.3	14.0	14.8	15.4	15.9	3.2%
Rental digital video (EUR m)	7.8	11.7	14.9	9.5	9.9	10.5	10.9	3.3%
Subscription digital video (EUR m)	520.9	654.3	802.8	979.0	1,180.4	1,567.8	1,882.7	20.1%
Total digital video (EUR m)	540.1	679.1	831.1	1,002.5	1,205.2	1,593.7	1,909.5	19.8%
Total digital video Total Europe (EUR m)	10,076.6	14,819.3	19,145.8	22,142.9	25,526.7	29,730.0	34,129.7	14.8%
CONSUMER LEVEL PAY TV TRANSACTIONAL VOD – TOTAL SPENDING								
The rental of film and TV content on a transactional (VoD, NVoD/PPV) basis via cable/satellite/IPTV services, only on set-top-boxes. This category specifically excludes sports, live events and adult content to ensure it is comparable to physical video data.								
Pay TV TVOD (EUR m)	76.2	80.5	84.2	85.0	86.9	86.7	86.5	-0.3%
Pay TV TVOD Total Europe (EUR m)	997.4	1,064.8	1,006.2	1,026.7	963.9	944.5	945.9	0.1%
CONSUMER LEVEL PHYSICAL VIDEO – TOTAL SPENDING								
Total market figures include consumption of legacy formats not broken out separately (eg, VHS, HD-DVD, UMD) where relevant.								
Physical video rental (EUR m)	0.3	0.2	0.1	0.1	0.0	0.0	0.0	-34.9%
Physical video rental Total Europe (EUR m)	109.5	66.9	43.3	30.1	21.8	16.2	11.6	-28.6%
Physical video retail (EUR m)	36.7	28.2	21.7	16.9	13.8	11.2	9.2	-17.6%
Physical video retail Total Europe (EUR m)	2,222.0	1,716.2	1,320.5	1,135.9	996.1	894.4	707.9	-20.8%
Physical video software (EUR m)	37.0	28.3	21.8	17.0	13.8	11.2	9.2	-17.7%
Physical video software Total Europe (EUR m)	2,331.5	1,783.1	1,363.8	1,166.0	1,017.9	910.6	719.5	-21.0%

*Notes: **1)** Consumer level digital video (OTT) and pay TV transactional VOD figures may differ from locally published figures due to the application of different definitions. **2)** Historical numbers in this section may differ from those published in previous years owing to changes in Omdia methodology, updated data sources and other data restatements. **3)** The current online figures are a snapshot of the market in June 2026. Figures are updated regularly and so it may not possible to compare directly to figures published after this date. **4)** Total Europe include Austria, Belgium, Denmark, Finland, France, Germany, Greece, Iceland, Ireland, Italy, Netherlands, Norway, Portugal, Spain, Sweden, Switzerland, UK, Croatia, Czech Republic, Hungary, Poland, Russia, and Slovakia. **5)** OTT Subscriptions are subscriptions to online channels and virtual pay TV operators. Figures exclude multiscreen services of pay TV operators.*

Key players in the market (in alphabetical order)

Physical	TVOD	SVOD
Bol.com	Apple TV+	Disney+
MediaMarkt	Google Play	HBO Max
	Pathe Thuis	Netflix
	Prime Video	Prime Video
	YouTube	Videoland

Share of European market 2025



Digital video (OTT)
5.6%

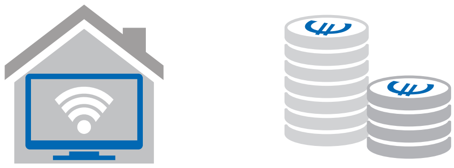
Pay TV TVOD
9.1%

Physical retail
1.3%

Physical rental
0.2%

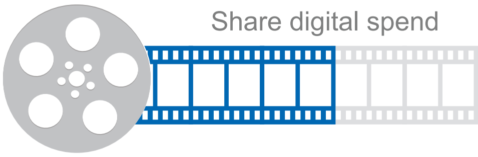
Average home entertainment spending

Spending per TV household (EURO)
€251.4



Spending per broadband household (EURO)
€281.9

Digital share of spend vs. broadband speed



Share digital spend
95%

Broadband subscriptions speed rank
(ranked across the 9 IVF countries)*

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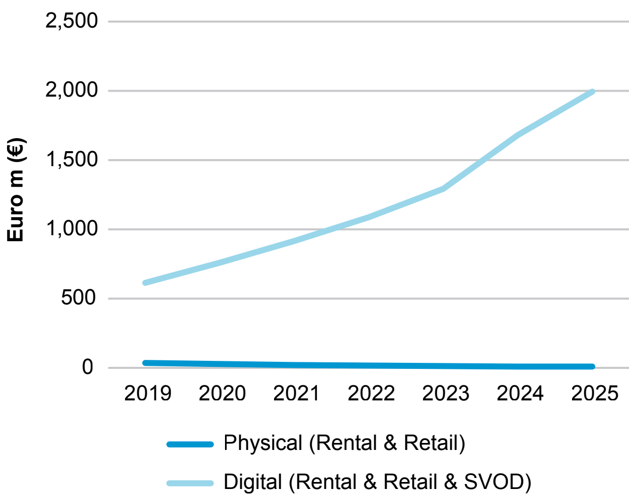
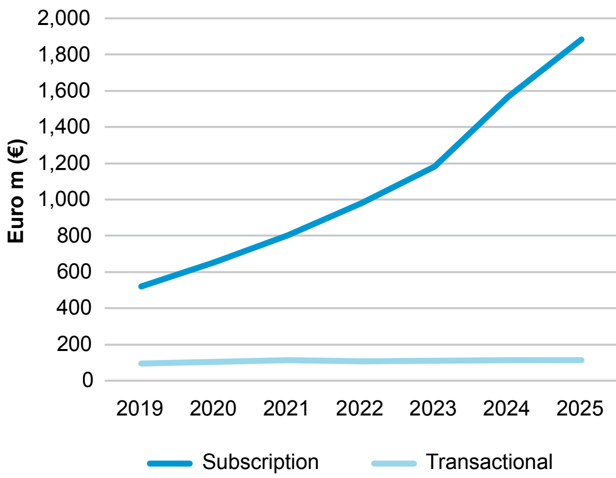
Comparison Physical vs Digital



Comparison Subscription vs Transactional



Note: Digital (Rental & Retail) includes SVOD data; Transactional excludes physical.
*Countries are ranked based on the proportion of broadband subscriptions receiving fixed data at speed over 30Mbps.

Source: Omdia