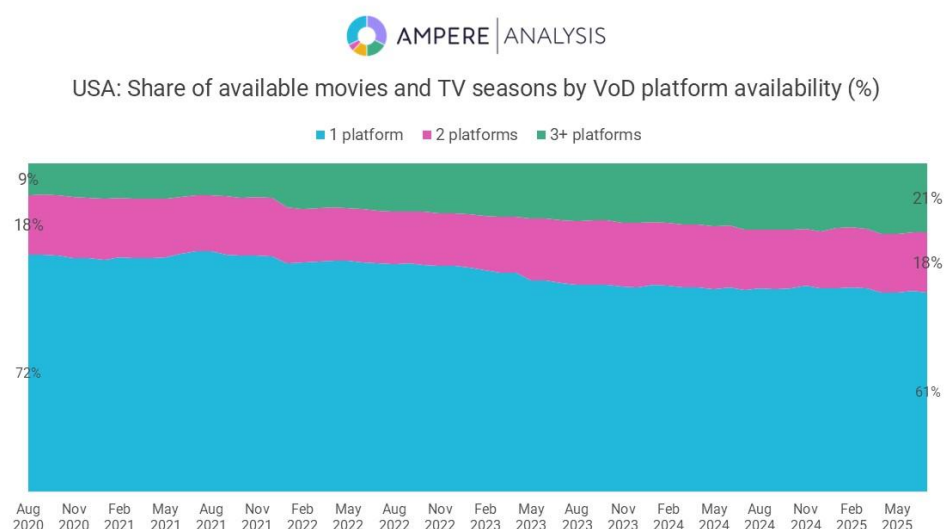


US streamers increasingly double up on content

Catalogue overlap is now common on US VoD platforms, but Europe lags

London, 30th September 2025: The latest intelligence from Ampere Analysis shows that US streamers are increasingly sharing catalogues across platforms. In July 2025, 39% of US titles (67,000 of 172,000) appeared on two or more services, compared with 13% in the UK and 8% in France over the same period. The high rate of non-exclusivity in the US VoD market is driven by AVoD platforms' push to build content scale, premium players seeking to monetise library assets for additional revenue, and a broader impetus to share content in a crowded market.



Source: Ampere Analytics – VoD

Key findings: US streamers shift to non-exclusive

- Across the US streaming landscape – including paid-for subscription services and pure-play ad-funded platforms – **67,000 movies and TV seasons were available on at least two different services** in July 2025. Non-exclusivity is significantly lower in the major European markets at just 13% in the UK and 8% in France.
- Titles simultaneously available on at least **three different VoD platforms rose from 9% in 2020 to 21% in 2025**.
- SVoD remains more exclusive than AVoD, but consolidation is pushing catalogues to converge. **Of shared titles, 43% span SVoD+AVoD (representing 29,000 titles) and 12% span multiple SVoD services (8,300 titles).**

- After Amazon closed Freevee and absorbed much of its content into Prime Video, **Prime Video's exclusive share fell from 41% (Aug 2023) to 24% (Jul 2025).**
- The formation of Warner Bros. Discovery increased overlap in the HBO Max and Discovery+ SVoD catalogues. By **July 2025, 51% of HBO Max's catalogue was simultaneously available on Discovery+.**
- Content overlaps are also growing among unaffiliated SVoD pairs. In Aug 2020, **14% of Peacock's library was on Amazon Prime Video; it's now 35%.**

Rahul Patel, Principal Analyst at Ampere Analysis, says: "The higher degree of non-exclusivity within VoD catalogues reflects the maturity of the US market. Platforms understand that new Originals and flagship franchises drive subscriber retention, while the longer tail is less central — freeing it to be licensed elsewhere for extra revenue."

AVoD: Where content overlap intensifies

- 45% of shared titles overlap between AVoD platforms. The largest pairs in July 2025 were **Tubi and The Roku Channel (23,600 titles)** and **Tubi and Plex (21,700).**
- Large libraries and non-exclusive licensing are central to the ad-supported VoD model, where scale drives essential viewer engagement.
- This rise in non-exclusivity is also seen in higher-value premium assets, defined as those with an **Ampere Critical Rating score of 60 or above out of 100.** Of these, 41% are on more than one platform, up from 31% five years ago and slightly ahead of the overall market.
- When it comes to shared genres, **Crime & Thriller accounts for 19% of shared titles compared to 16% of all titles. Horror over-indexes** at 5.0% of shared content versus 3.6% overall.
- Vintage content still appeals. **Titles released between 2010 and 2019 make up 43% of shared content.** Those released between 2020 and 2025 account for 28%.

Rahul Patel, Principal Analyst at Ampere Analysis, says: "The high rate of non-exclusivity in the US VoD market is not only driven by the prevalence of a long tail of content. Co-exclusive deals for premium titles — such as recent deals between Netflix and HBO, and Disney and AMC — show that higher-value content is also shared. Europe hasn't achieved the same level yet, but new broadcaster-streamer pacts — for example, ZDF and Atresmedia with Disney+, Netflix with TF1, and Amazon with France Télévisions — point to similar dynamics emerging."

Ends

Note to editors

*AVoD refers to the content available on-demand on such services and does not include their FAST channel-only titles.

**The Critical Rating is a proprietary score from 0 to 100 created based on user reviews collected from online critical rating websites. For TV seasons, scores are collected across a TV show as a whole and the same value is applied to each TV season of that show.

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About Ampere Analysis

Founded in January 2015, Ampere Analysis is a new breed of media analyst firm. The company's experienced team of sector-leading industry analysts specialises in sport, games, pay and multiscreen TV and next-generation content distribution. Our founders have more than 60 years combined experience of providing data, forecasts and consulting to games publishers, the major film studios, telecoms and pay TV operators, technology companies, TV channel groups and investment banks. www.ampereanalysis.com