



Circulation of European films on VOD and in cinemas

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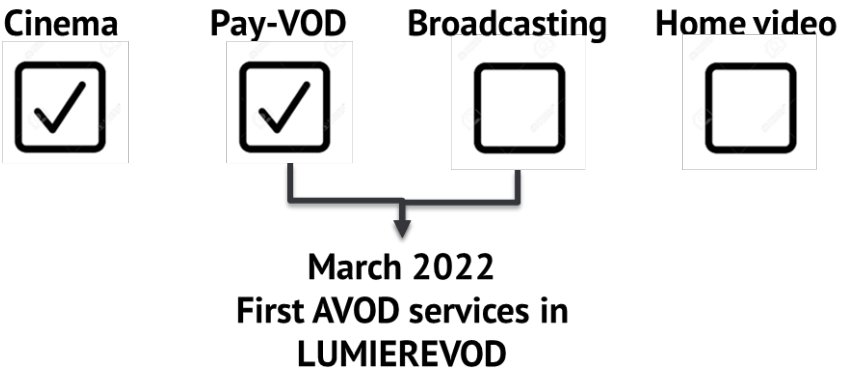
Presentation at the Advisory Committee meeting - 10 March 2022

A publication of the European Audiovisual Observatory

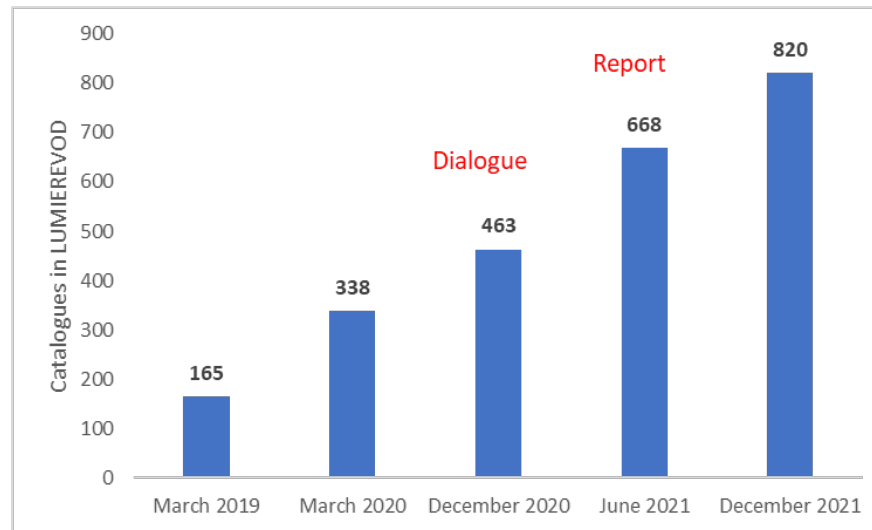


CIRCULATION OF FILMS: SOME CONTEXT

Partial coverage



Rapidly evolving supply



Different angles

FILM POINT OF VIEW

Average size of TVOD catalogue

5 000

VS

European films released since 1996

28 000

CONSUMERS' POINT OF VIEW

How many European (non)national
films available?
And which films?

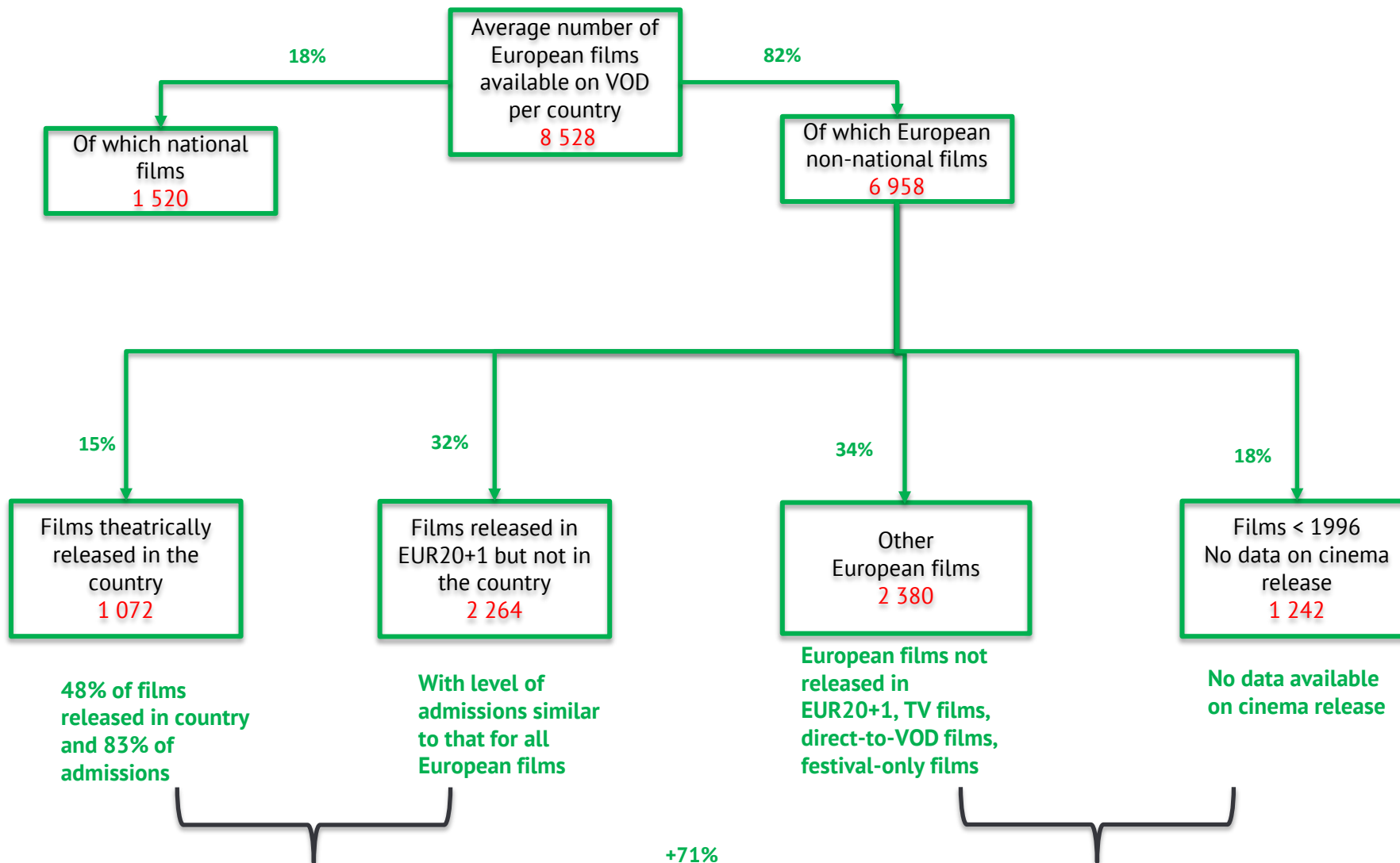
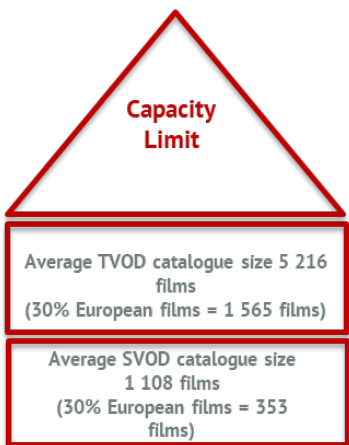
Methodology:

- **Scope - 21 countries:** 20 EU27 countries and GB = **EUR20+1** (sufficient data on VOD catalogues and cinema admissions)
- **All European films released between 1996 and 2020 in EUR20+1 cinemas** and of European origin (first production country member state of the Council of Europe), tracked in LUMIERE with their admissions
 - **27 944 European films** released in the period 1996-2020
- **European films available on SVOD and TVOD services in EUR20+1 in June 2021** (a film presence is only counted once per country), tracked in LUMIERE VOD
 - **149 TVOD catalogues** and **447 SVOD catalogues** = 596 VOD catalogues in EUR20+1.
 - **28 VOD catalogues/country**

Report divided into two parts

- **1. The offering of European films on VOD and in cinemas**
 - Which films are available to European consumers in their country on VOD in June 2021?
 - Which films were available to European consumers in their country in cinemas 1996-2020?
- **2. The drivers of VOD availability**
 - For theatrically released European films (1996-2020) in EUR20+1, which metrics/indicators could explain later VOD availability outside of their production country?
 - Focus on European non-national films on VOD and 5 metrics/indicators to understand VOD availability

The average country offering of European films on VOD



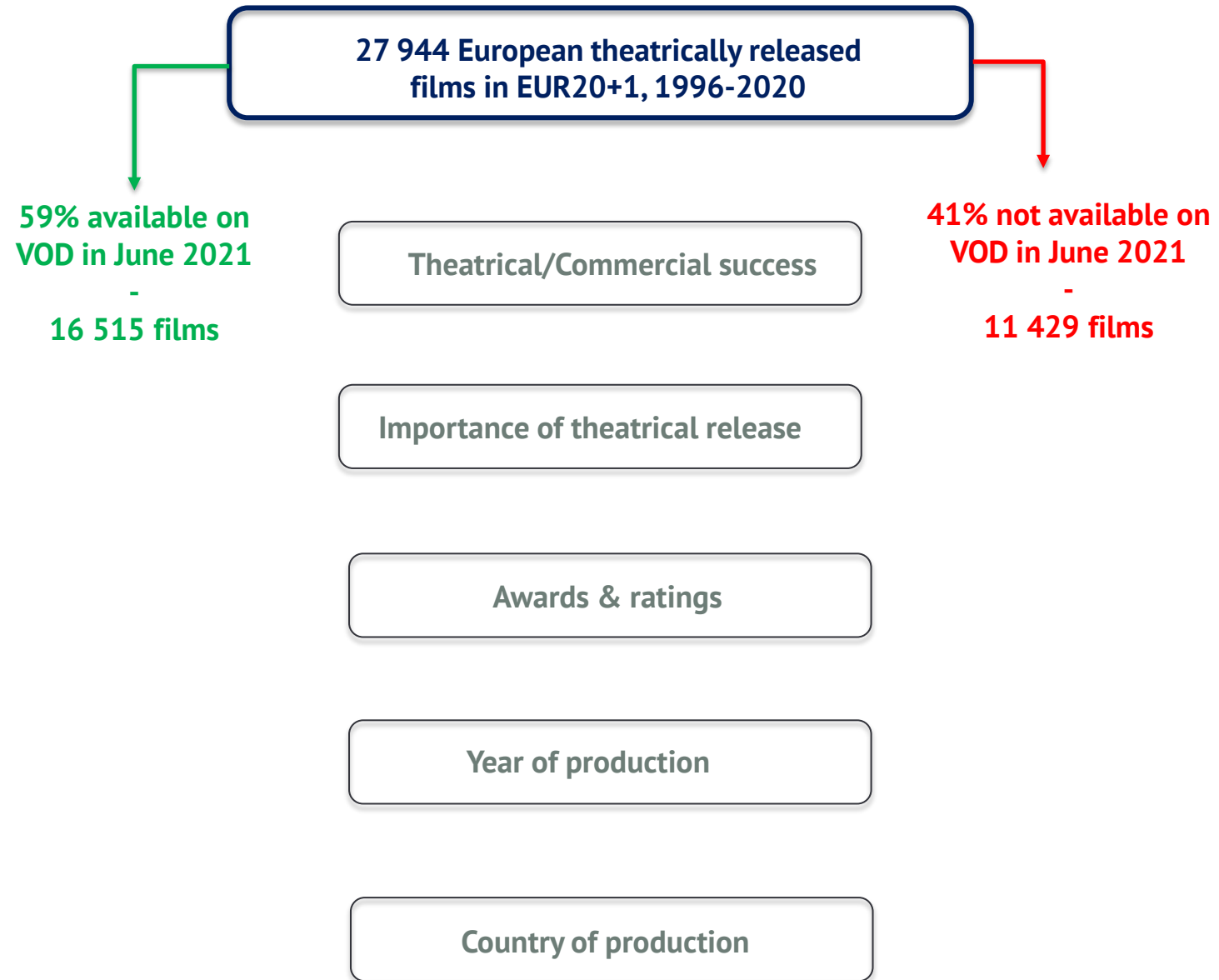
Percentages may not total 100 due to rounding
Source: European Audiovisual Observatory

Theatrical EUR non-national films available on VOD June 2021: **3 336**
 Theatrical EUR non-national films released in cinemas 1996-2020: **1 949** +71%

Not included in second part of the report – no data on exploitation



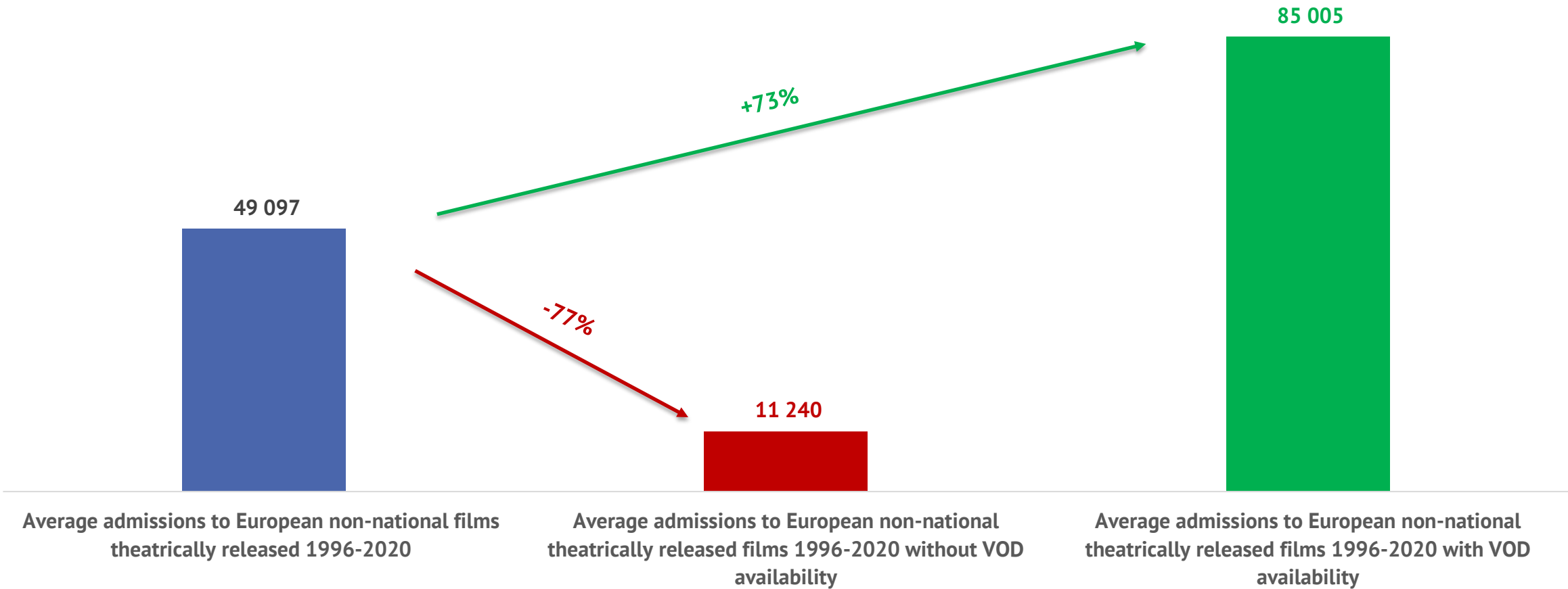
5 metrics of theatrical films could shed a light on latter VOD availability



Source: European Audiovisual Observatory

Theatrical success - Higher average admissions for films available on VOD in EUR20+1

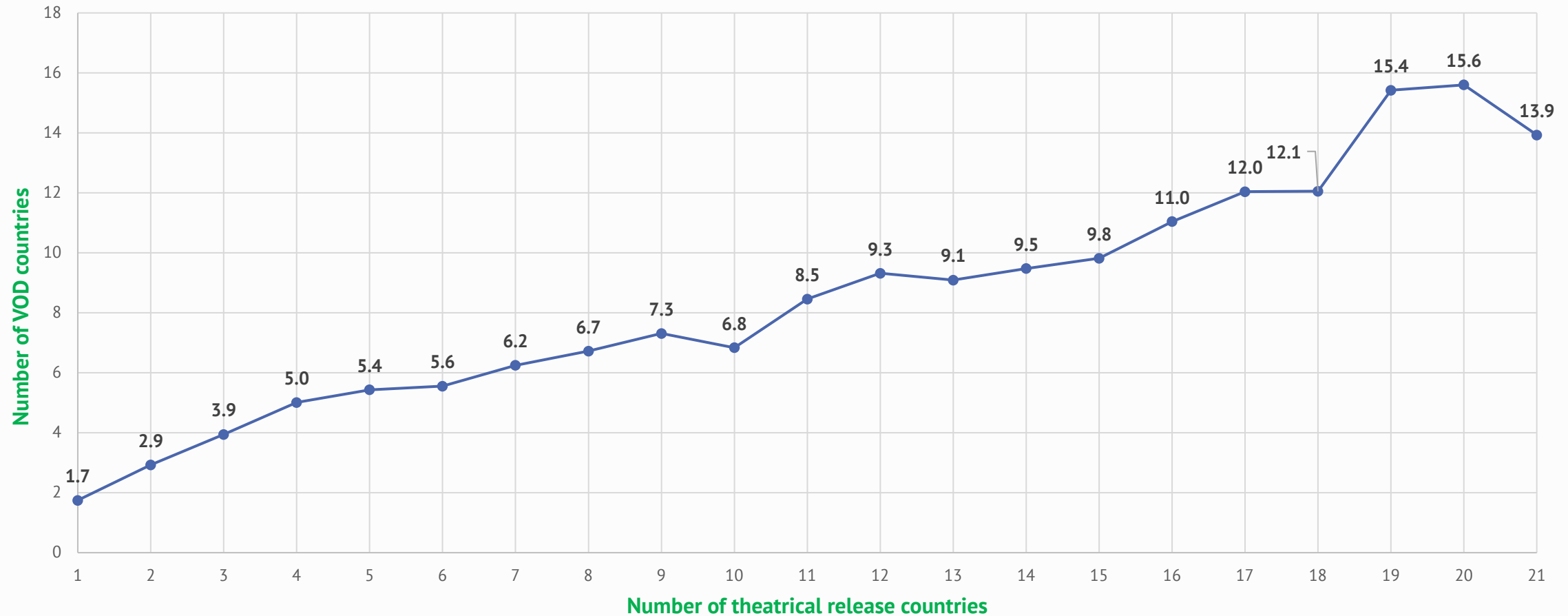
Average non-national admissions of European non-national films by VOD availability
in admissions per non-national film



Theatrical releases drive the circulation on VOD

Average VOD market availability, in function of number of theatrical release markets, for all theatrical European films 1996-2020

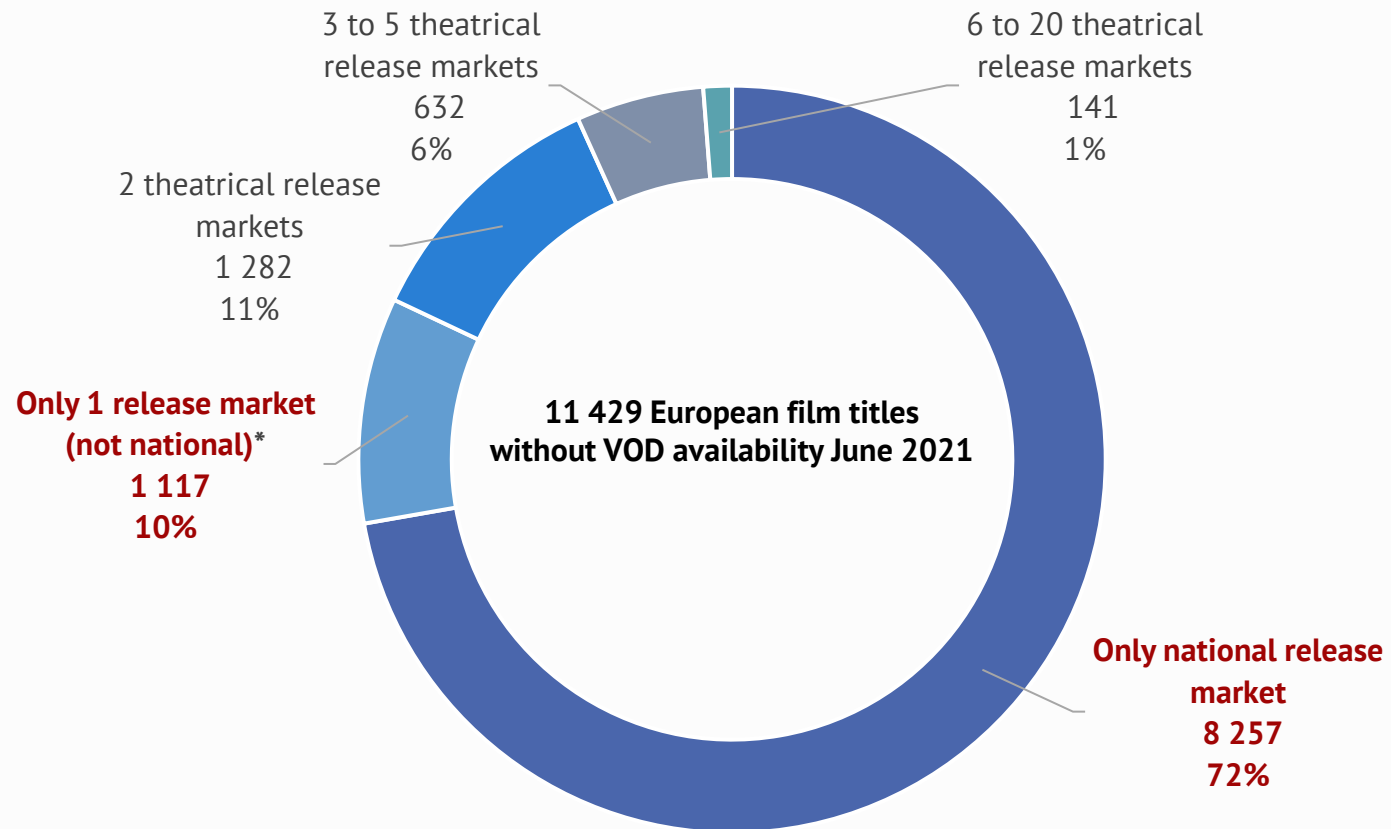
In number of release markets in EUR20+1



Source: LUMIERE, JustWatch, LUMIERE VOD, European Audiovisual Observatory

Theatrical release - 82% of films without VOD availability had only one theatrical release market

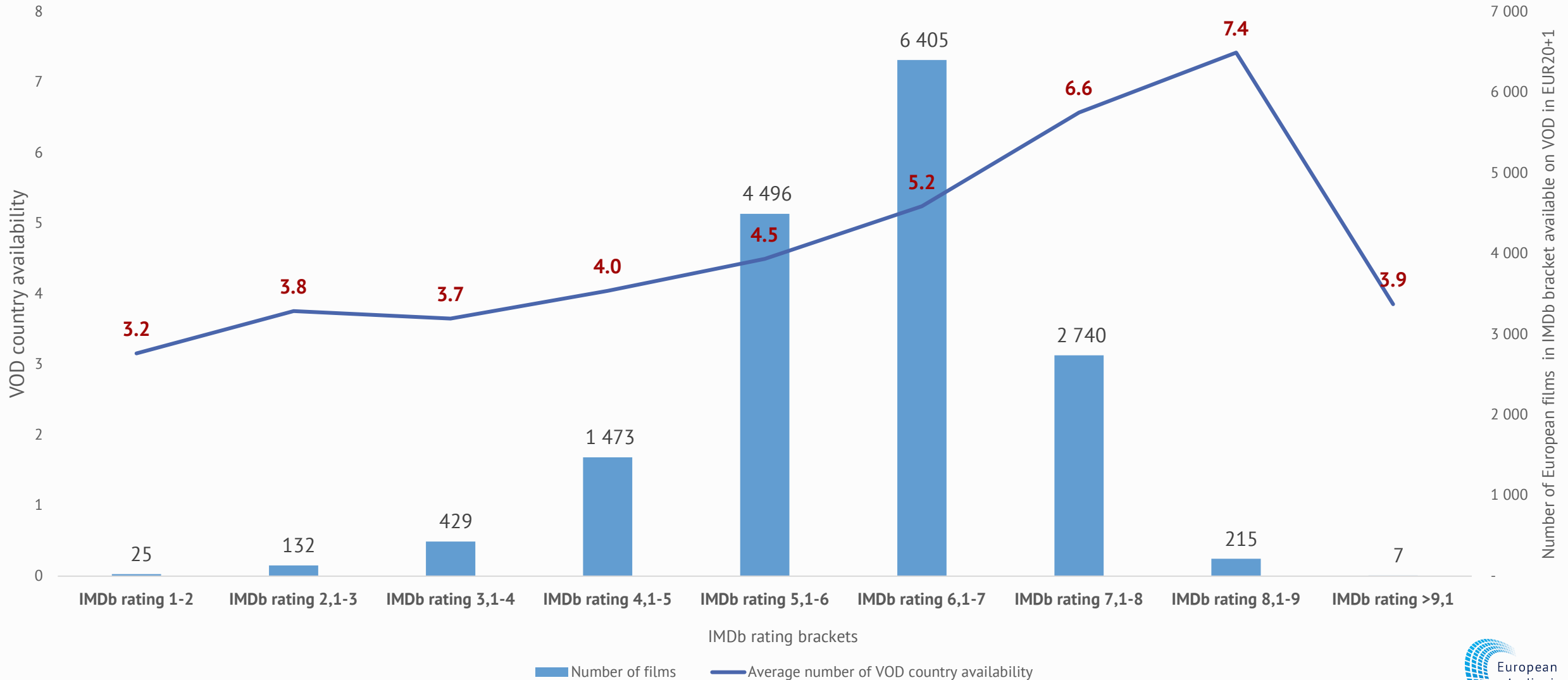
Number of films without VOD availability in May 2021 in function of theatrical release markets 1996-2020
In number of theatrical release markets in EUR20+1



*primary production country outside of EUR20+1

IMDb ratings could explain the number of countries in which a film is made available on VOD

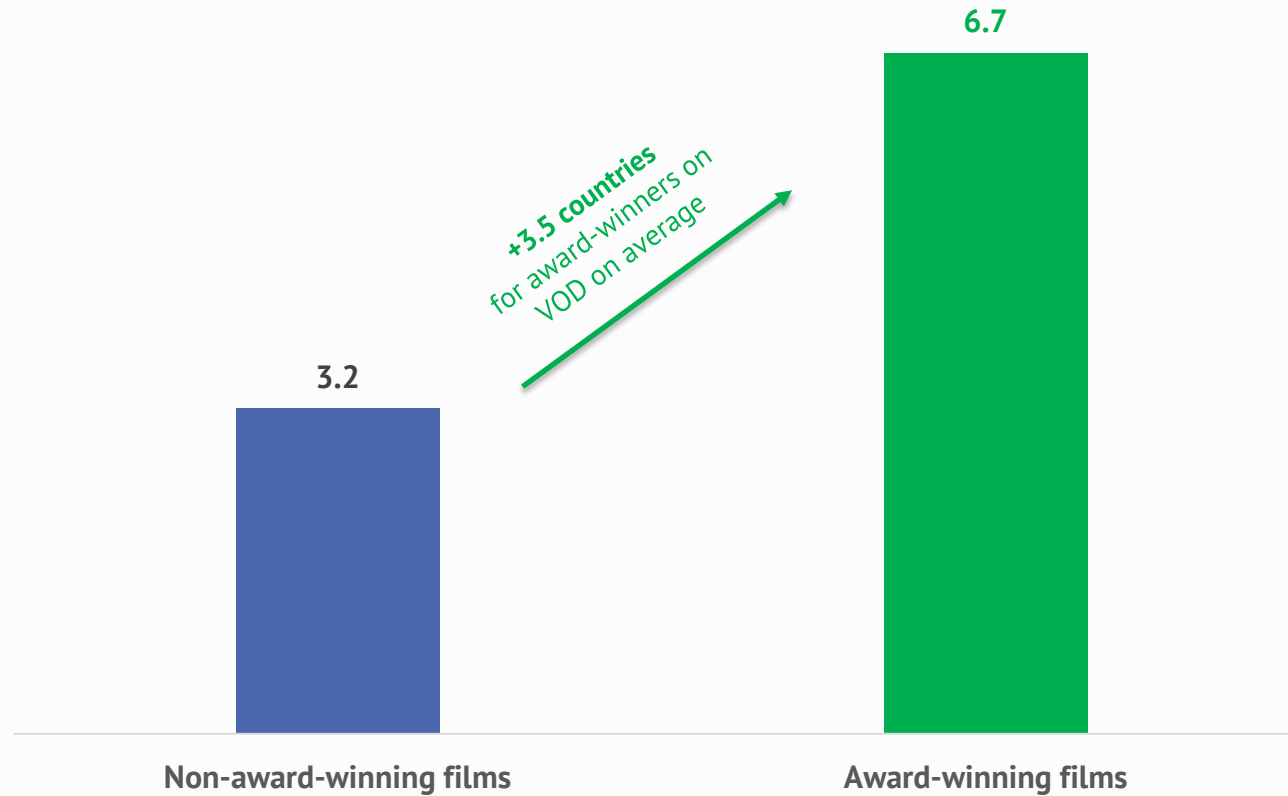
VOD country availability in function of IMDb ratings bracket – only films with IMDb rating and VOD availability
 In number of films, IMDb rating (1-10) and average VOD country availability numbers



Source: LUMIERE, JustWatch, LUMIERE VOD, European Audiovisual Observatory

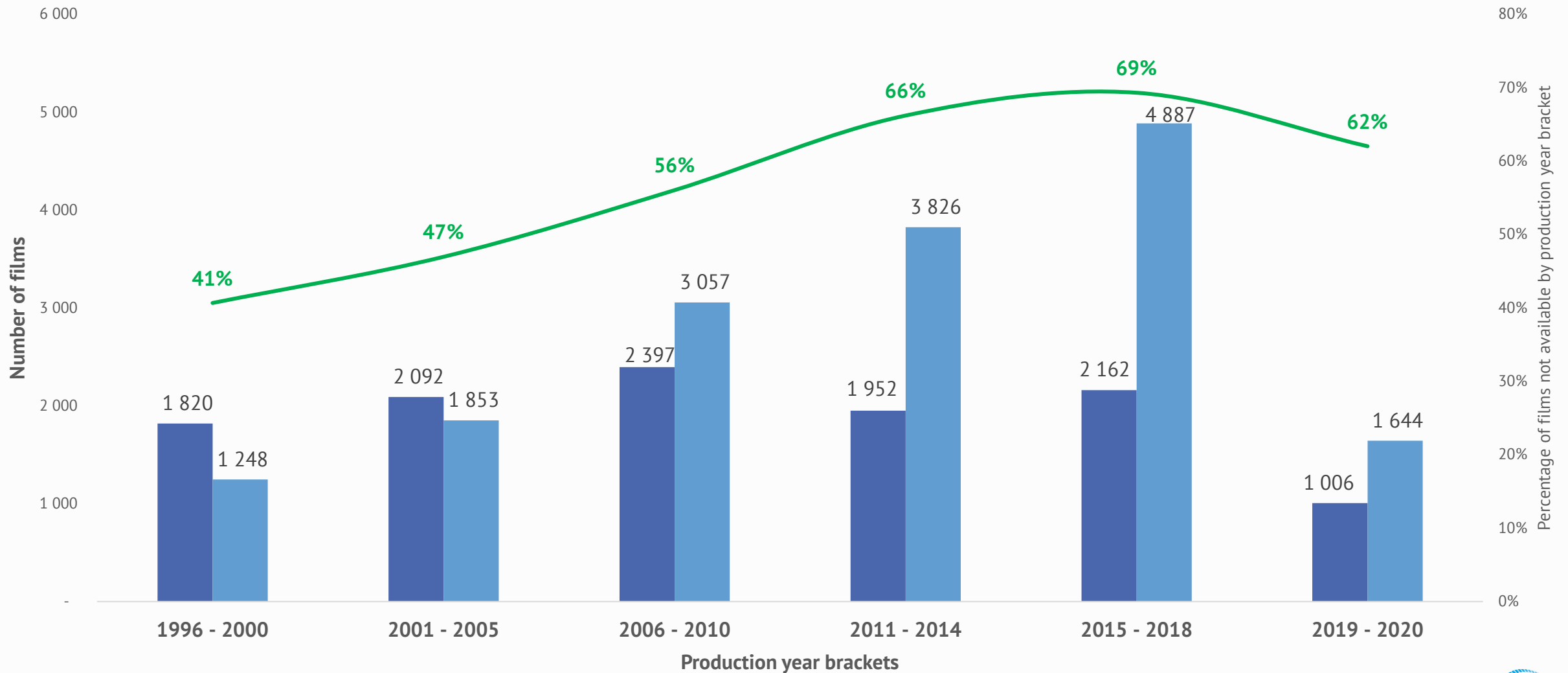
Awards: A positive impact on theatrical and VOD distribution

Average number of country availability for films on VOD
In number of country availability, VOD May 2021



Increased VOD availability with recentness of European films

Availability of European films on VOD by year of production and percentage of films available on VOD by production bracket
In number of European films available and % of total films in production bracket

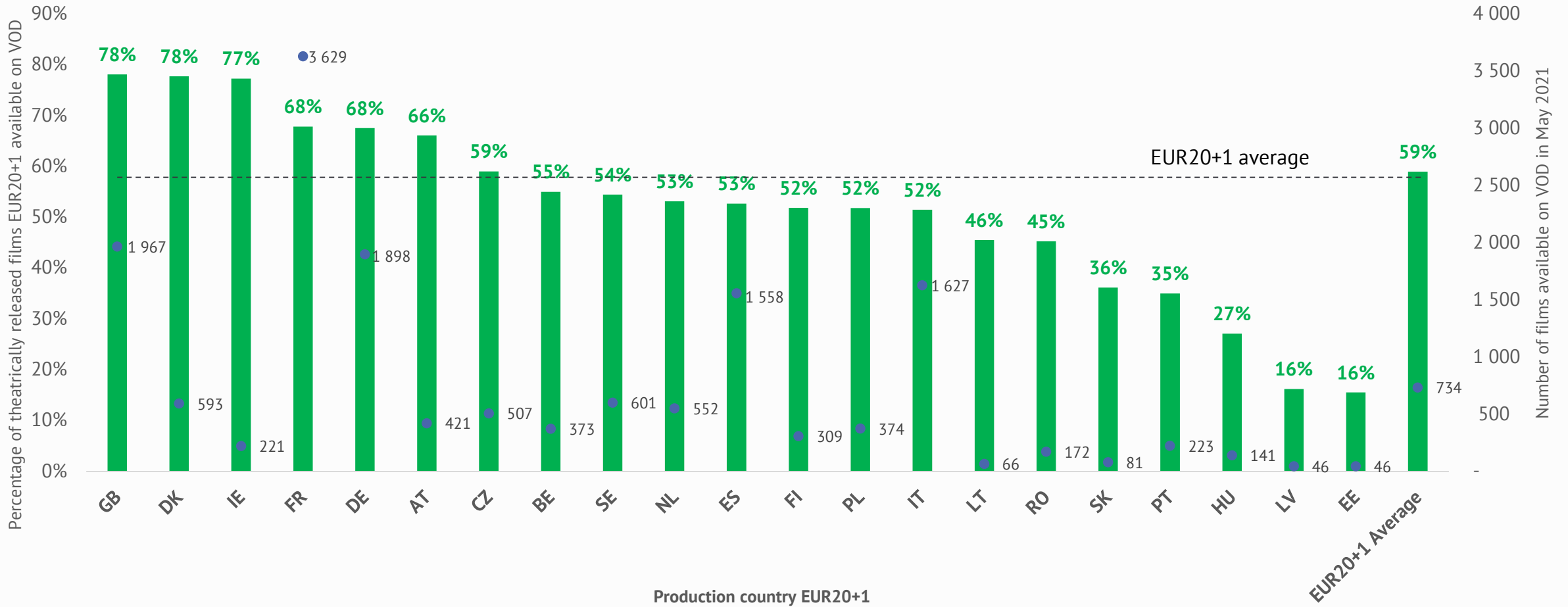


■ European theatrically released films without VOD availability
 — Percentage of films available on VOD in function of production year

■ European theatrically released films with VOD availability

Production countries make a difference in terms of future VOD availability

Percentage of theatrically released European films available on VOD May 2021 by EUR20+1 country of production and number of films
 In percentage of total theatrically released films by country of production and number of films



■ Percentage of theatrically released films 1996-2020 available on VOD May 2021 in EUR20+1 ● Number of theatrical film titles available on VOD in May 2021



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