

How are theatrical films distributed on TV and on VOD in the EU ? 2024 figures

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This report provides an analysis of the **circulation of films from cinemas to television and video-on-demand**. The analysis follows two main angles:

- **Part A: What is the offer of theatrical films on linear TV and VOD services in 17 EU countries?**
 - How many unique theatrical film titles are available on linear TV and VOD services across all exploitation windows?
 - What is the region of origin of the theatrical films available on linear TV and VOD services in the 17 EU countries?
 - At country level, how many theatrical films are available to viewers in these 17 EU countries, and what proportion of the overall film offering do theatrical films represent in the different exploitation windows?
- **Part B: How are theatrical films on release in EU27 cinemas in 2022 exploited on linear TV and VOD services in 2023?**
 - What proportion of theatrical films released in 2022 were available on VOD services or broadcast on linear TV in 2023?
 - Are there differences in subsequent exploitation in other windows after cinema release between recent and catalogue theatrical films?
 - What are the shares in terms of 2022 admissions of theatrical films exploited in other windows in 2023?
 - How are EU27 theatrical films exploited in other windows in relation to their cinema admissions?
 - What are the average circulation figures for theatrical films in the EU17, broken down by cinema release markets, linear TV and VOD presence by region of origin?
 - How does the subsequent exploitation of EU27 theatrical films in other windows impact their availability to EU17 viewers compared to cinema distribution?

Please note that different datasets have been used to answer the different research questions. The composition of the dataset is mentioned at the beginning of each section of the report.

Methodology

- **Geographic scope:** The analysis includes the 17 EU countries for which data for 2023 and 2024 were available for each distribution window (hereafter EU17). These 17 EU countries are Austria, Belgium, Czechia, Denmark, Germany, Estonia, Finland, France, Hungary, Ireland, Italy, the Netherlands, Poland, Portugal, Romania, Sweden and Spain.
- **Counting of film presence:** The film presence analysis is done on a country basis per distribution window (TV, FOD, SVOD or TVOD) unless indicated otherwise. A film is counted once per country and distribution window even if it was present several times during the same year. The data limits and count method are specified at the beginning of each section, as the parameters vary throughout the report.
- Film exploitation data sources:
 - Cinema exploitation data in the EU27 and EU17 was gathered through LUMIERE
 - TV exploitation data in the EU17 was provided by Mediapress
 - VOD exploitation data in the EU17 was provided by JustWatch
- A film is defined as a feature film, fiction film, documentary or other film content available in the 'Film' / 'Movie' section of the VOD catalogues and TV schedules that are part of the sample provided by Metaprofile.
- For the origin of a title, only the first country of production is taken into account. The production countries are based on data collected from the European Audiovisual Observatory's LUMIERE database on admissions to films in Europe, IMDb and the Movie database.
- Production regions: regions of origin are the EU27, GB (produced in the United Kingdom), other Europe (part of the Council of Europe), US and non-US/non-European (all other regions worldwide).
- The shares included in this report are only indicative and minor identification errors might have occurred.

Please quote this report as 'How are theatrical films distributed on TV and VOD in the EU? –2024 figures', European Audiovisual Observatory.

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Sample – Countries and number of TV channels and VOD services per country

Country	Linear TV	FOD	SVOD	TVOD	Total
AT	10	11	48	15	84
BE	44	6	28	7	85
CZ	70	2	26	7	105
DE	99	20	68	22	209
DK	23	4	34	9	70
EE	102	2	21	5	130
ES	40	6	43	12	101
FI	29	7	32	10	78
FR	76	10	46	18	150
HU	62	2	23	7	94
IE	5	3	33	10	51
IT	70	7	47	8	132
NL	47	3	37	12	99
PL	98	3	30	10	141
PT	17	3	24	9	53
RO	56	2	22	4	84
SE	27	6	34	10	77
Total	875	97	596	175	1743

Source: Linear TV – Mediapress (2023)

Source: VOD services – JustWatch (2024)

Main findings

How many theatrical films were exploited on TV and VOD?

- **An impressive 34 000 different theatrical films were available on TV and/or VOD in 2023.**
 - TVOD and SVOD offered much more shelf space for theatrical films than TV and FOD, with 27 000 and 28 000 titles respectively, compared to 14 000 and 10 000.
 - At EU country level, the average number of theatrical films available was around 9 300 on TVOD, 9 200 on SVOD, 3 000 on TV and 1 400 on FOD.

How important are theatrical films among film broadcast and VOD catalogues?

- **To understand the composition of VOD services' film catalogues, it is important to note that, unlike on television, only a minority of the films on offer have been released in cinemas in the EU.**
 - However, when looking at the origin of films, strong differences appear between:
 - EU films (most of which have been released in cinemas) and
 - US films (most of which were not released in cinemas, e.g., films released in cinemas outside Europe but not in Europe, originals commissioned by SVOD platforms and TV movies).
 - In other words, VOD services tend to prioritise theatrical films when proposing EU films, but resort more to non-theatrical films when proposing US films.
 - Therefore, when considering only theatrical films, the proportion of EU films is higher (over 30%) than in the full film catalogues (around 20%).
- **The situation is quite different for broadcasting (with much less space dedicated to films): theatrical films are the main source for films, whatever their origin.** In other words, TV channels broadcast far fewer films than VOD services make available and do not need to complement theatrical films with non-theatrical ones.

How many theatrical films make it to TV and VOD?

- **Overall, the release in cinema offers a kind of ‘guarantee’ of exploitation in other windows: 84% of recent films on release in cinemas in 2022 were available on TV and/or on VOD in 2023.** SVOD and TVOD, with their huge catalogues, are the main drivers of subsequent exploitation, whereas television has less airtime to dedicate to films and FOD primarily relies on non-theatrical films produced by their parent broadcasting companies.
- The figure was higher for US films (95%) than for European films (83%), which is still remarkable given that European films account for 66% of films released in cinemas, compared to 13% for US films.

Which theatrical films make it to TV and VOD?

- **The most successful films are available on television or VOD:** films released in cinemas in 2022 that were available on TV in 2023 represented 92% of all cinema admissions in 2022. The figures were even higher for SVOD (98%) and TVOD (96%).
 - Similar figures emerge when considering only EU films: 82% of 2022 cinema admissions were for films available on TV in 2023, compared to 95% for SVOD and 89% for TVOD.
 - Most EU27 blockbusters were available on SVOD and TVOD services (between 89% and 100% of films with more than 500 000 admissions), and over 82% of recent EU27 films with more than 500,000 admissions were also available on linear TV.

Are EU theatrical films made available in more markets thanks to TV and VOD?

- **EU films are made available in more countries thanks to television and VOD services.**
 - While a cinema release in one country usually leads to a TV or VOD release, both services offer films that were theatrically released elsewhere in the EU but not in that country. Indeed, more than half of EU27 theatrical films that were broadcast or made available on TV and/or VOD did not have a theatrical release in the country in which they were shown.
 - Overall, access to EU27 theatrical releases is substantially increased by VOD and linear TV compared to theatrical releases in individual countries, with a factor ranging from 2x to 5x depending on the country.

PART A

THE OFFER OF THEATRICAL FILMS ON LINEAR TV, SVOD, TVOD AND FOD SERVICES

A.1. Number of theatrical films available on TV, FOD, TVOD and SVOD

- **Methodology – data setting**
 - **The theatrical films included were produced between 1996 and 2023 for TV, and between 1996 and 2024 for VOD.**
 - **All theatrical film titles broadcast on TV in 2023** in the EU17.
 - **All theatrical film titles available on FOD, TVOD and SVOD catalogues in 2024** in the EU17.

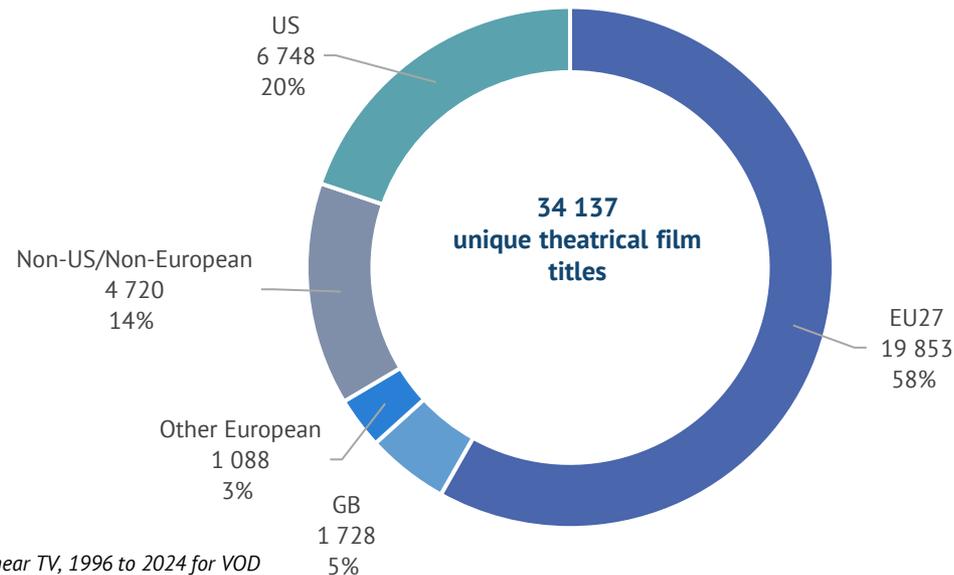
 - **A film title is counted once for each distribution window (TV, FOD, TVOD and SVOD)**
 - A film title can only be present once per business model (on TV, FOD, TVOD and SVOD).
 - Several broadcasts of a film title are counted once.
 - A film title's multiple presence during the year is counted once, for FOD, SVOD and for TVOD.

 - **Theatrical release data of films in the EU27 from 1996 to 2023/2024** was retrieved through LUMIERE.
 - No limit on film admissions.

More than half of all theatrical film titles in exploitation on TV or VOD were of EU27 origin and 2/3 are of European origin

- More than 34 000 theatrical film titles (produced between 1996 and 2024 and released in EU27 cinemas) were in exploitation on linear TV or VOD.
- During the same period, 52 968 theatrical films were released in EU27 cinemas, meaning that 64% of all theatrical films released over the last 28 years in the EU27 were available on either linear TV or VOD services (TV data from 2023 and VOD data from 2024).
- This demonstrates that exploiting theatrical films through other distribution channels after their theatrical release is integral to their overall exploitation.
- The lion's share of theatrical films exploited were EU27 films, accounting for 58% of all theatrical titles available and/or broadcast, followed by US films with 20% and non-US/non-European films with 14%.
- European films (EU27, GB, other European origin) accounted for 66% of all films available on linear TV and/or VOD services.

Unique theatrical film titles in exploitation on all four distribution windows (on TV in 2023 and VOD in 2024)
in number of unique theatrical film titles available or broadcast



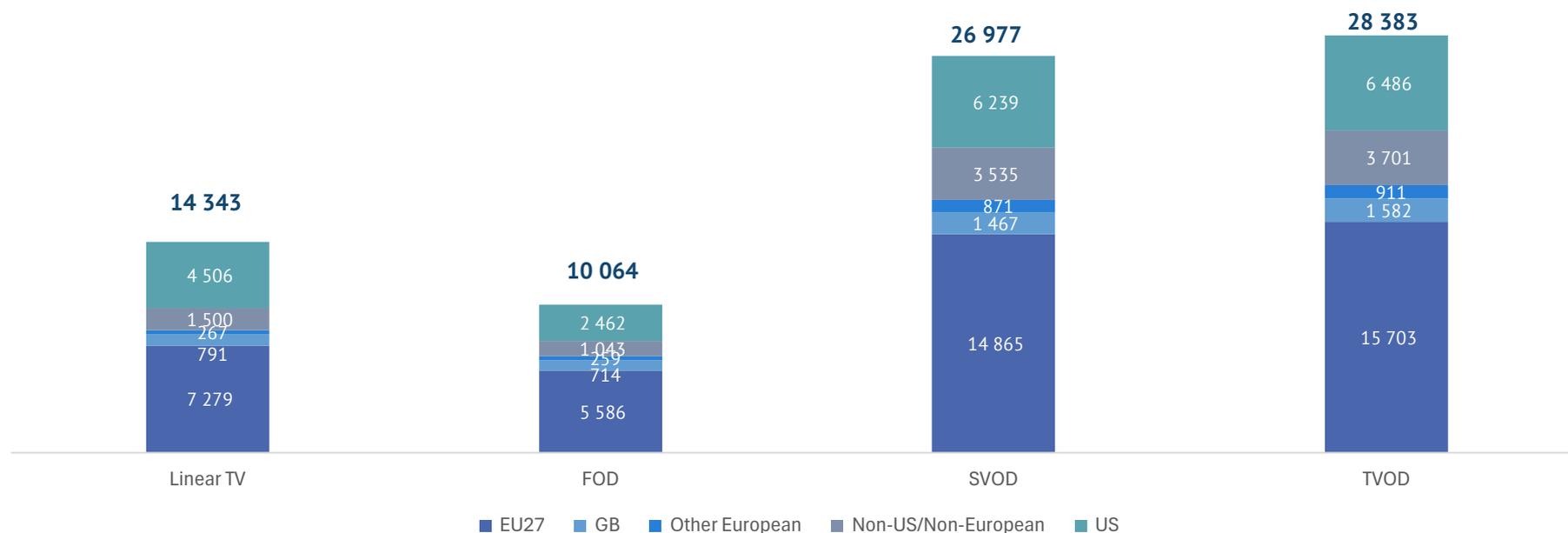
*Films produced between 1996 to 2023 for linear TV, 1996 to 2024 for VOD
With a theatrical release in the EU from 1996 to 2024
Each theatrical title is counted only once for all four distribution windows
No minimum admissions*

Source: European Audiovisual Observatory, LUMIERE, JustWatch, Mediapress

Pay VOD services proposed the highest number of theatrical films in EU17, far ahead of TV channels and FOD services

- For each window, EU27 film titles accounted for more than half of all theatrical film titles available or broadcast. They ranged from 51% on linear TV, to 55% on SVOD and TVOD services, to 56% on FOD services.
- The total share of European theatrical film titles (from EU27, GB and other European countries) ranged from 58% on linear TV, to 64% on SVOD/TVOD services, to 65% on FOD services.
- US theatrical film titles accounted for 31% of all theatrical film titles broadcast on linear TV, whereas their share was smaller on VOD services, ranging from 23% to 24%.
- Pay VOD services had more than three times the number of theatrical film titles available than FOD services, and almost twice the number broadcast on linear TV.

Unique number of theatrical film titles in exploitation on linear TV in 2023 and VOD in 2024 in 17 EU27 countries
in number of theatrical film titles per distribution window



Films produced between 1996 to 2023 for linear TV, 1996 to 2024 for VOD
 With a theatrical release in the EU from 1996 to 2023 for TV, 1996 to 2024 for VOD
 No minimum admissions

Source: European Audiovisual Observatory, LUMIERE, JustWatch, Mediapress

▪ **Methodology – data setting**

- **The films included were produced between 1996 and 2023 for TV, and between 1996 and 2024 for VOD.**
- **All films broadcast on TV in 2023** in the EU17.
- **All films available on FOD, TVOD and SVOD catalogues in 2024** in the EU17.

- **A film is counted once for each distribution window (TV, FOD, TVOD and SVOD) and for each country.**
 - A film can be present up to four times in the same country (on TV, FOD, TVOD and SVOD).
 - Several broadcasts of a film in the same country are counted once.
 - A film's multiple presence during the year is counted once, for FOD, SVOD and for TVOD.

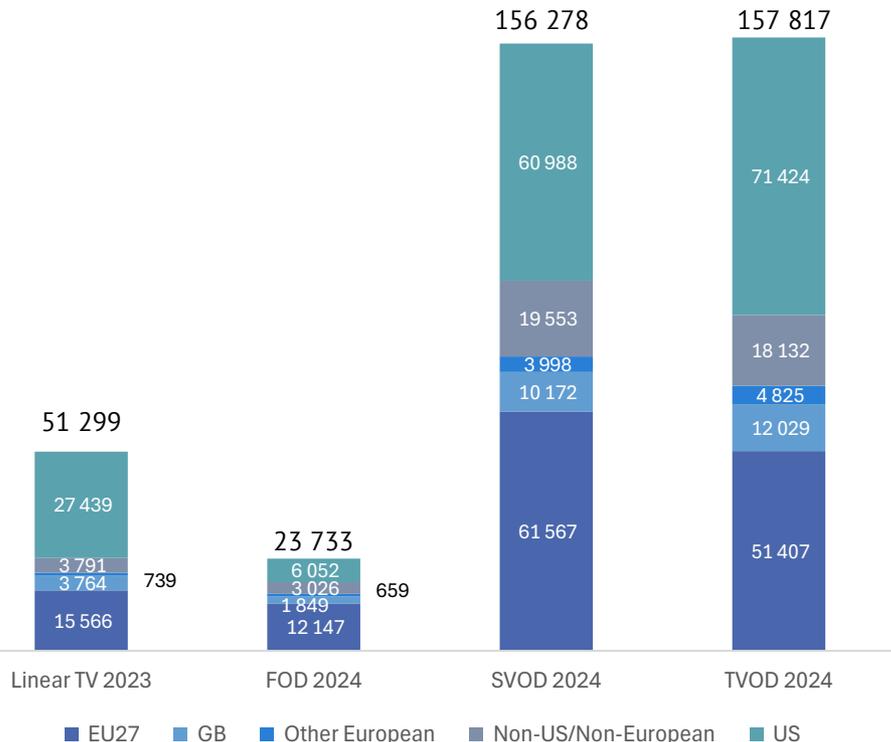
- **Theatrical release data of films in the EU27 from 1996 to 2023/2024** was retrieved through LUMIERE.
 - No limit on film admissions.

Origin of theatrical films in exploitation on each window in 17 EU27 countries

- With over 156 000 theatrical films in their catalogues, SVOD and TVOD services had the highest number of films in exploitation. This was more than three times the number broadcast on linear TV and over six times the number available on FOD services.
- US theatrical films accounted for the largest proportion of films broadcast on linear TV and available on TVOD platforms, while EU27 theatrical films represented over half of the films available on FOD platforms (primarily due to broadcasters' replay services).
- SVOD services relied equally on EU27 and US theatrical films, with films of both origins representing 39% of their catalogue. SVOD and FOD services also had the highest share of non-US and non-European theatrical films.

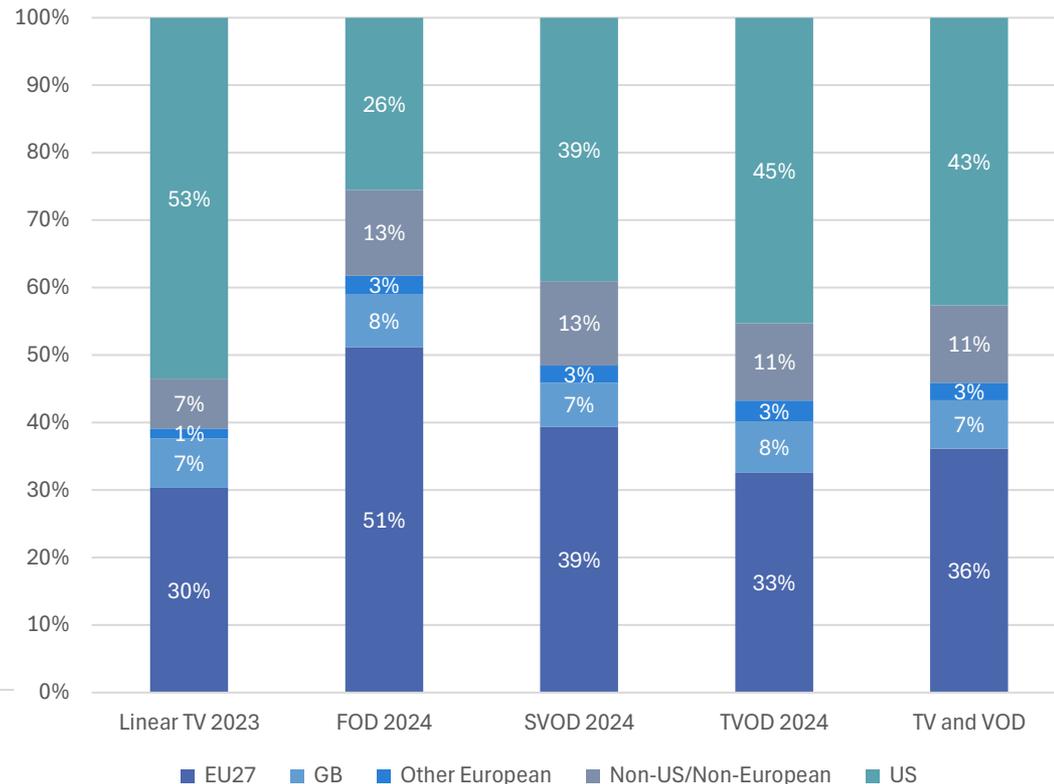
Origin of theatrical films by region of origin in 17 EU27 countries

in number of total theatrical films available/broadcast



Origin of theatrical films by region of origin in 17 EU27 countries

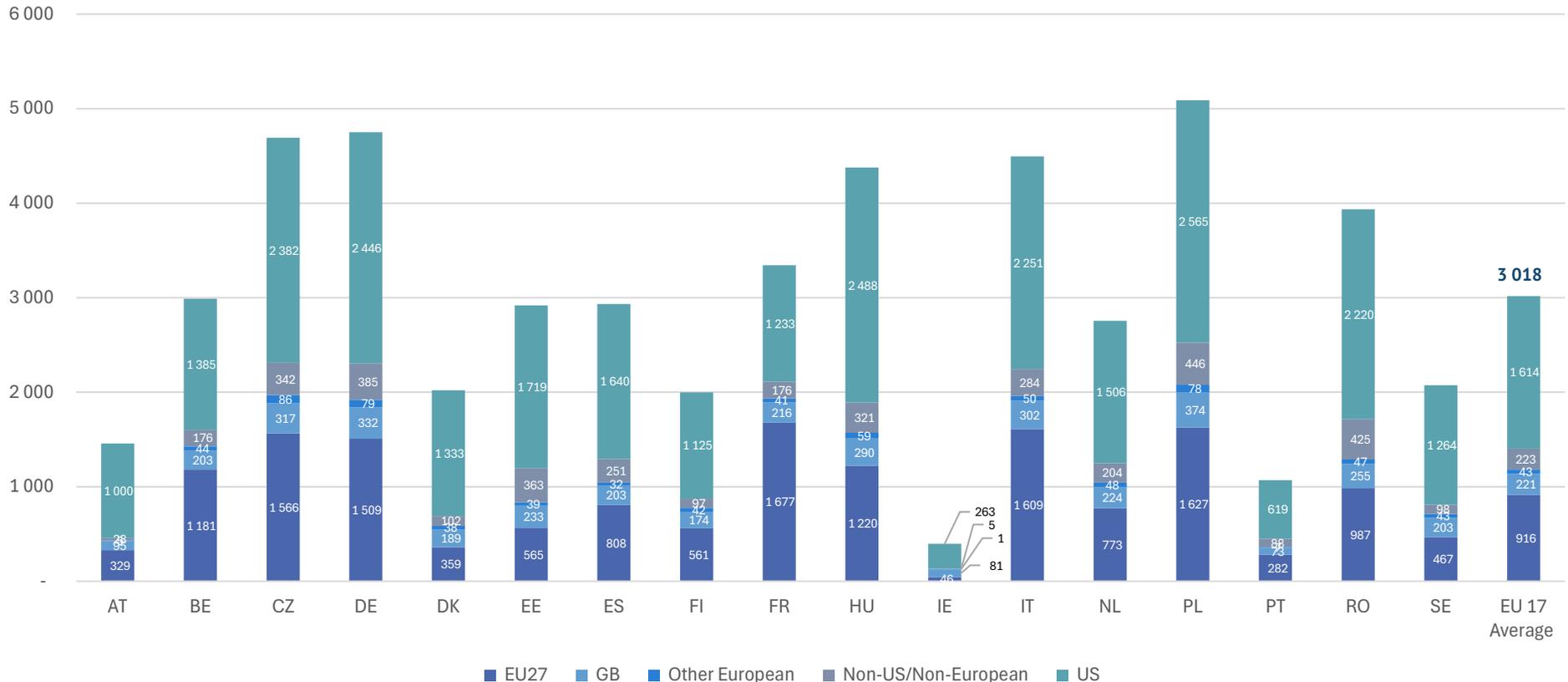
in percentage of total theatrical films available



Number of theatrical films in exploitation on linear TV in 2023 by country

- On average, 3 018 theatrical films were broadcast on linear TV per country in 2023. In all countries except Belgium (46%) and France (37%), US films accounted for more than 50% of all theatrical films broadcast.
- In France, EU27 films accounted for 50% of all theatrical films broadcast; in all other countries, the share ranged from 12% in Ireland to 18-19% in Denmark and Estonia, 36% in Italy and 40% in Belgium.

Number and origin of theatrical films broadcast on linear TV in 2023 by country and region of origin
in number of theatrical films broadcast

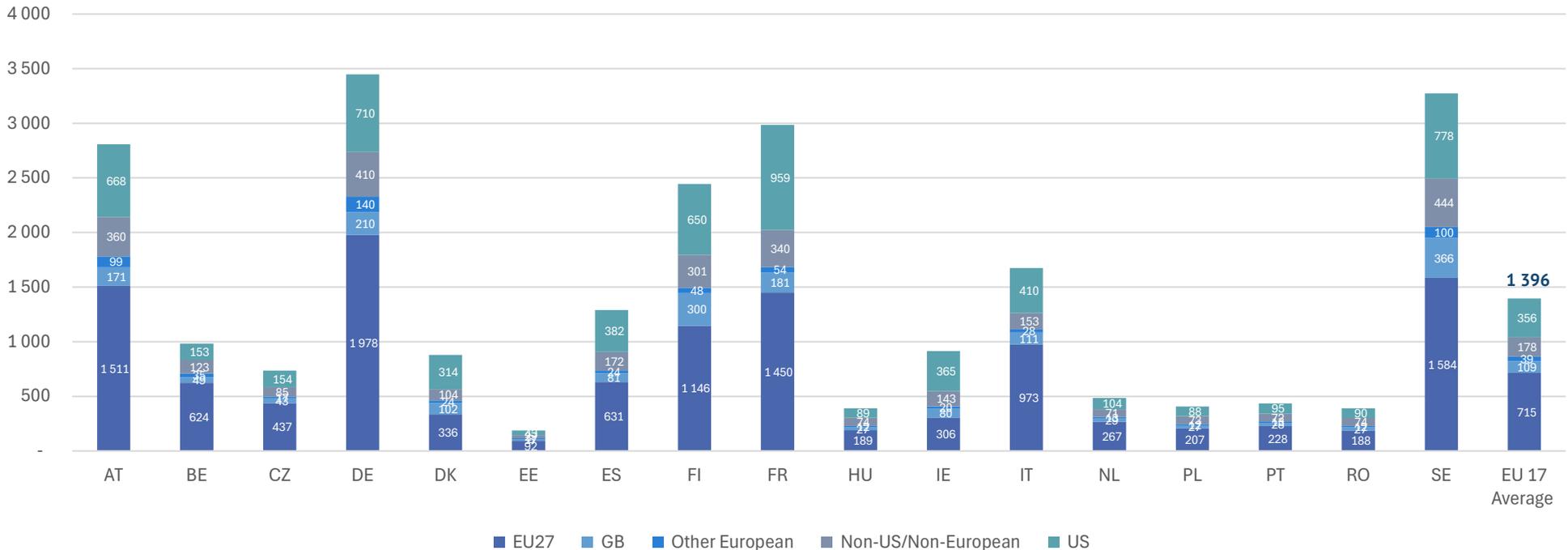


Source: European Audiovisual Observatory, LUMIERE, JustWatch, Mediapress

Number of theatrical films in exploitation on FOD service in 2024 by country

- The number of theatrical films available varies greatly by country, depending on whether broadcasters' catalogues are present in the sample of FOD services.
- The highest number of theatrical films was found in the catalogues of FOD services in Germany, Sweden, France, Austria and Finland (over 2 000 theatrical films), while the lowest number was found in the catalogues of FOD services in Estonia, Romania, Hungary and Poland.
- The share of EU27 theatrical films ranged from 33% in Ireland and 38% in Denmark to 58/59% in Czechia and Italy, and 63% in Belgium.
- US theatrical films had their highest share in Ireland (40%) and Denmark (36%), and their lowest share in Belgium (16%), Germany, Czechia and the Netherlands (21%).

Number and origin of theatrical films available on FOD services in 2024 by country and region of origin
in number of theatrical films available

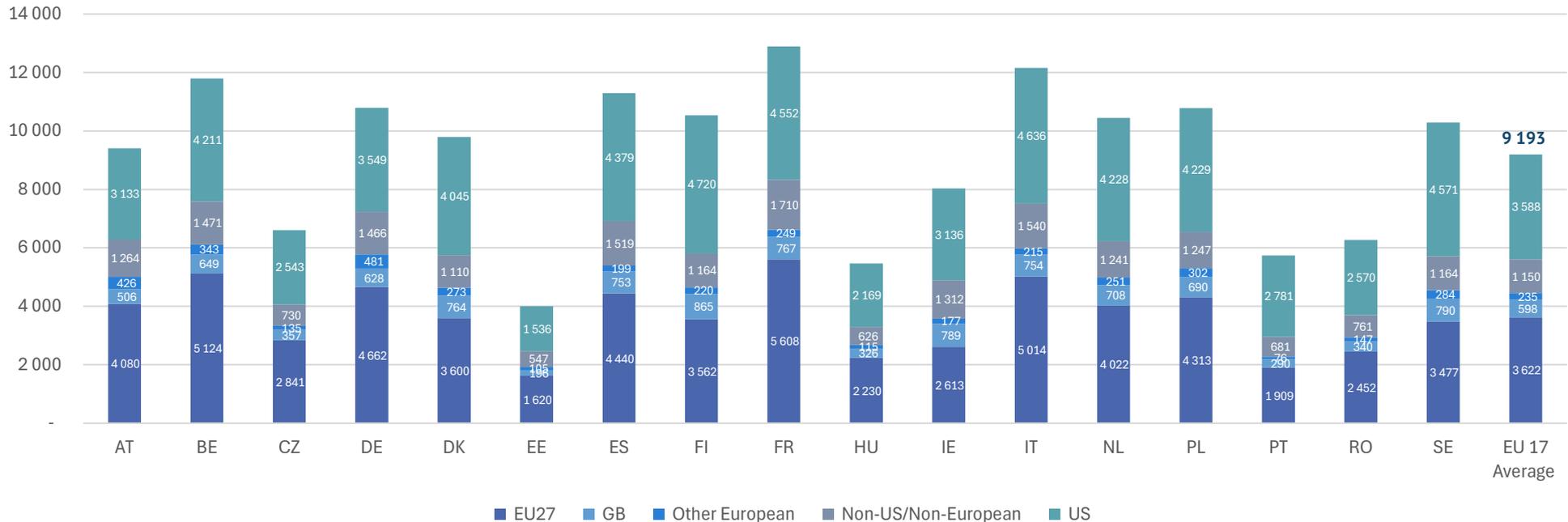


Source: European Audiovisual Observatory, LUMIERE, JustWatch, Mediapress

Number of theatrical films in exploitation on SVOD services in 2024 by country

- With an average of over 9 000 theatrical films available in the EU17, SVOD services provide their subscribers with extensive access to theatrical films. Due to the presence of several pan-European players in the SVOD sample, the shares of theatrical films by region of origin were comparable across several countries.
- This was particularly evident in France and Belgium, which had a share of EU27 films of 44% and 43% respectively, alongside a share of US films of 35% and 36% respectively, of British films of 6% each, and of non-US/non-European films of 13% and 12% respectively. Similar patterns were observed in Germany and Austria, Sweden and Finland, and Estonia and Poland.
- The highest shares of EU27 theatrical films were found in France, Belgium, Austria, Germany and Czechia, while the lowest shares were found in Ireland and Portugal at 33%.
- The highest shares of US theatrical films were found in Portugal (48%) and Finland (45%), while the lowest shares were found in Germany and Austria (33%).

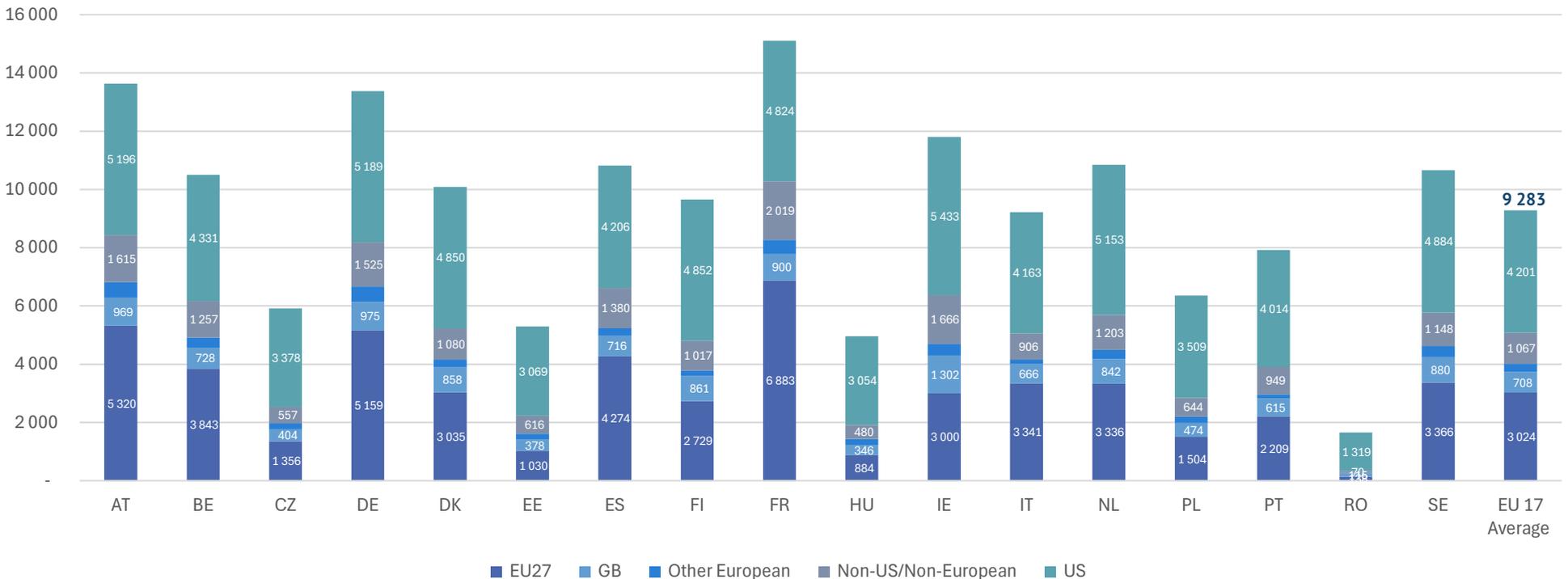
Number and origin of theatrical films available on SVOD services in 2024 by country and region of origin
in number of theatrical films available



Number of theatrical films in exploitation on TVOD services in 2024 by country

- With an average of over 9 000 films, TVOD services offered the largest number of theatrical films of all four distribution windows, highlighting their importance in the theatrical film distribution value chain.
- The highest shares of EU27 theatrical films were found in France (46%), Spain (40%), and Austria and Germany (39%), while the lowest shares were in the catalogues of TVOD services in Romania (8%, partly due to only one TVOD service being included in the sample), Hungary (18%), and Estonia (19%).
- The highest shares of US theatrical films were found in Romania, Hungary and Estonia, while the lowest shares were found in the catalogues in France, Austria, Germany and Spain (32%–39%).

Number and origin of theatrical films available on TVOD services in 2024 by country and region of origin
in number of theatrical films available



Source: European Audiovisual Observatory, LUMIERE, JustWatch, Mediapress

▪ Methodology – data setting

- **The films included were produced between 1996 and 2023 for TV, and between 1996 and 2024 for VOD.**
- **All films broadcast on TV in 2023** in the EU17.
- **All films available on FOD, TVOD and SVOD catalogues in 2024** in the EU17.

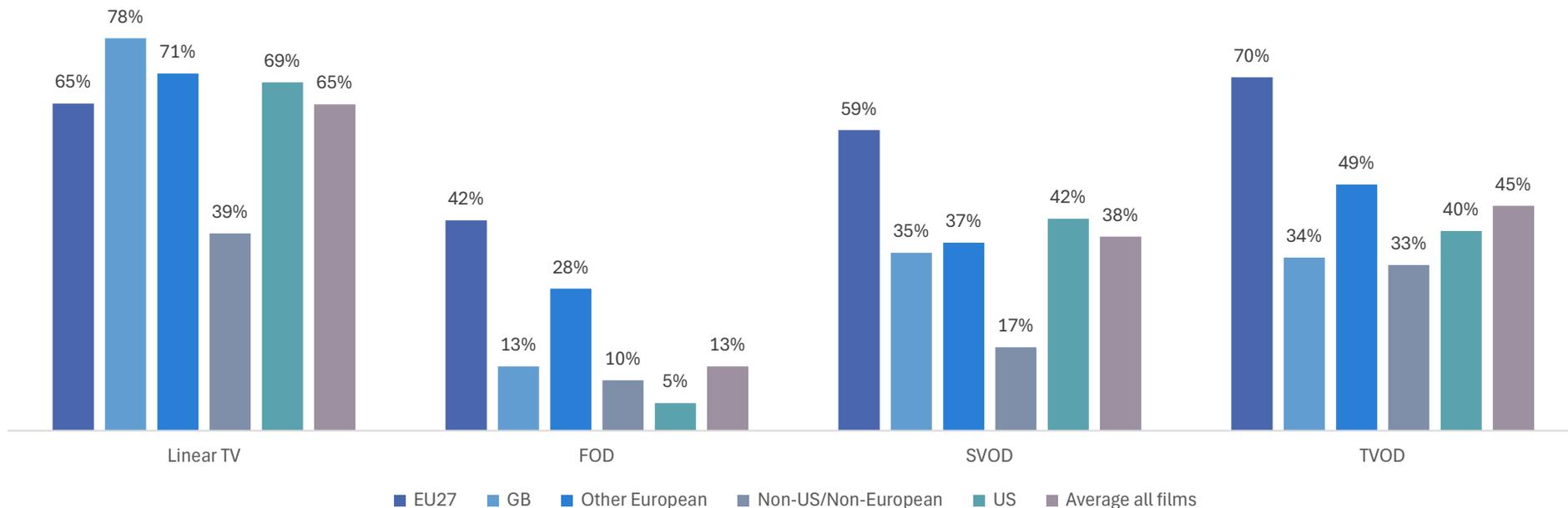
- **A film is counted once for each distribution window (TV, FOD, TVOD and SVOD) and for each country.**
 - A film can be present up to four times in the same country (on TV, FOD, TVOD and SVOD).
 - Several broadcasts of a film in the same country are counted once.
 - A film's multiple presence during the year is counted once, for FOD, SVOD and for TVOD.

- **Theatrical release data of films in the EU27 from 1996 to 2023/2024** was retrieved through LUMIERE.
 - No limit on film admissions.

Share of theatrical films in exploitation (TV 2023, VOD 2024) in all four distribution windows

- Taking into account the proportion of theatrical films in the overall film offering, linear TV is the distribution channel with the highest average share of theatrical films for all regions of origin, with 65% of all films broadcast on linear TV in 2023 having had a theatrical release in the EU27.
- TVOD services had the second-highest share of theatrical films in their total offerings, at 45%. This was mainly due to the high proportion of theatrical films from the EU27, which accounted for 70% of all EU27 films in TVOD catalogues. However, for all other regions of origin, TVOD services relied heavily on films that had not been released theatrically in the EU27.
- SVOD services' share of theatrical films was 38% of all films, with the EU27 film offering being the only one with more theatrical films (59%) than non-theatrical films. For all other regions of origin, SVOD services mostly offered non-theatrical releases.
- FOD services had the lowest share of theatrical films, with only 13% of films having had a cinema release, and fewer than half of EU27 films having had a theatrical release – the only distribution window for which this was the case.

Share of theatrical films in 17 EU27 countries by region of origin
in percentage of theatrical films out of all films available by window by region of origin



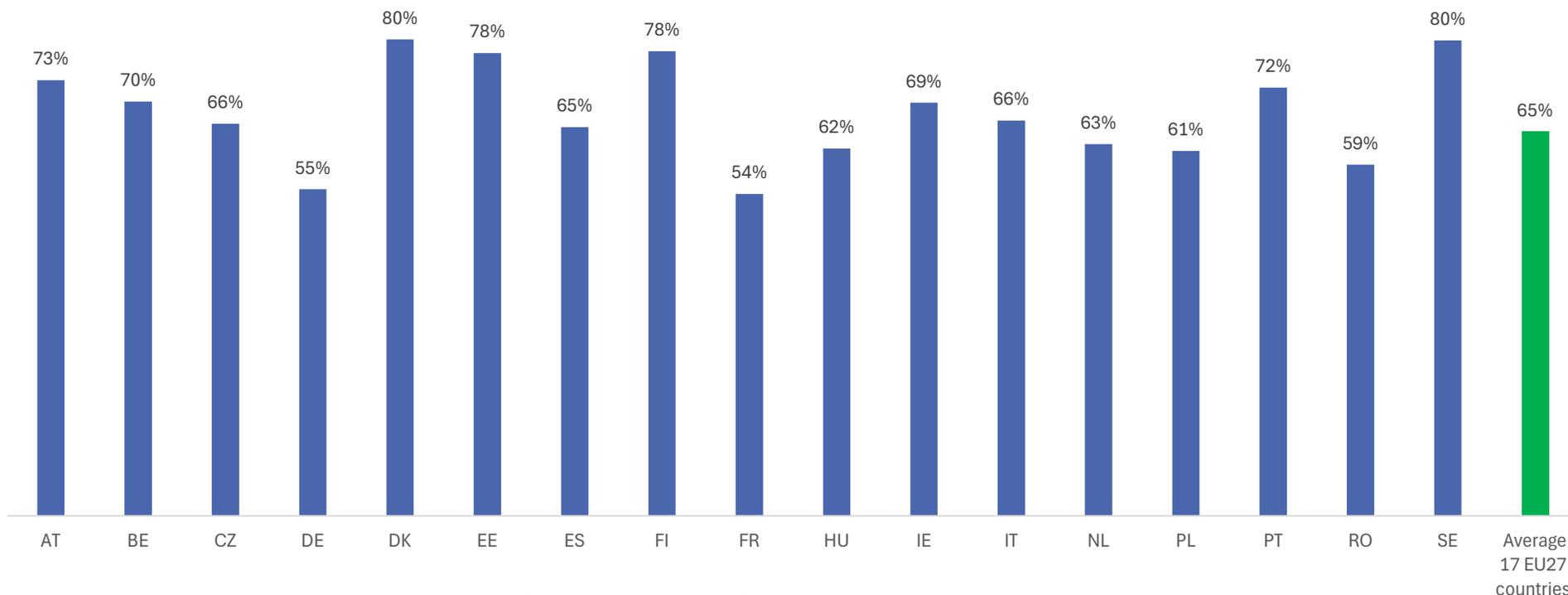
Source: European Audiovisual Observatory, LUMIERE, JustWatch, Mediapress

Share of theatrical films in exploitation on linear TV by country

- On average, 65% of all films broadcast in the EU17 were theatrical releases in the European Union, demonstrating linear TV channels' reliance on theatrical films for marketing, word-of-mouth and audience recognition to attract viewers.
- Sweden and Denmark had the highest share of broadcast theatrical films, followed by Finland and Estonia.
- France and Germany, which have well-developed TV fiction film production industries, had the lowest share.

Share of theatrical films on linear TV by country in 2023

in percentage of all films broadcast

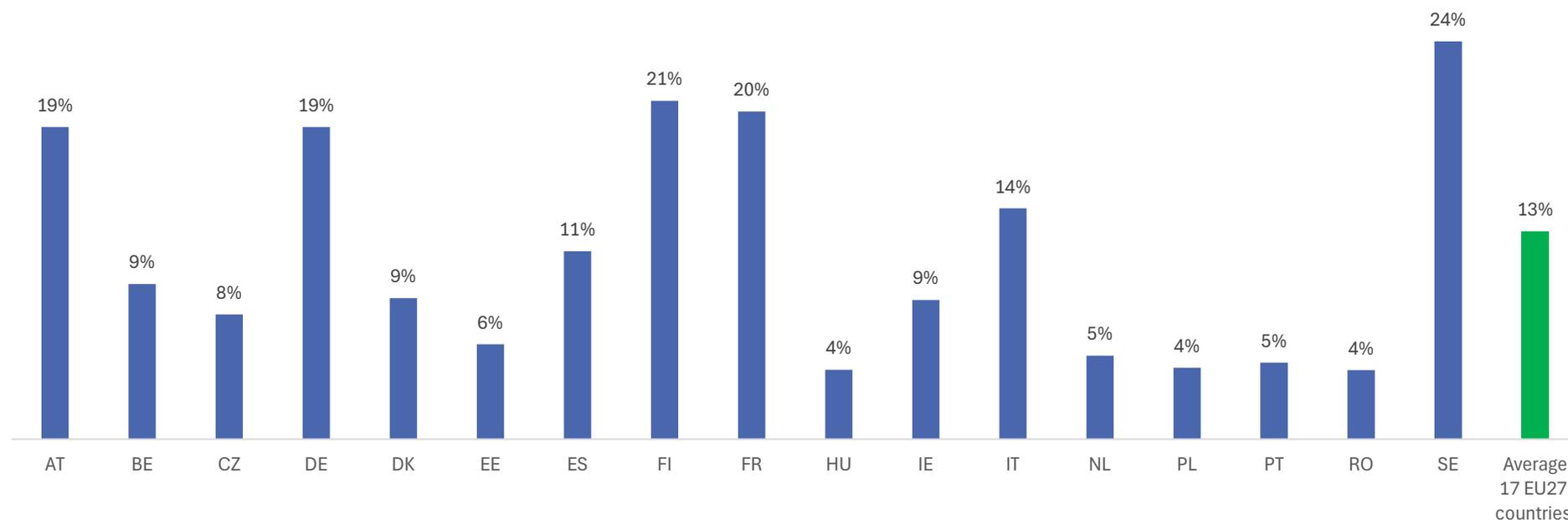


Source: European Audiovisual Observatory, LUMIERE, JustWatch, Mediapress

Share of theatrical films in exploitation on FOD by country

- On average, FOD services have the lowest share of theatrical films in their catalogues, with only 13% of films having been released in European cinemas.
- The countries in which the national broadcasters' catalogues were available on the FOD services sample had the highest shares of theatrical films: These were Sweden with 24%, Finland with 21%, France with 20%, and Germany and Austria with 19% each.
- Several countries had a very low share of theatrical releases in their FOD catalogues, mostly countries with pan-European FOD services specialising in genres or topics. On average, FOD catalogues in Hungary, Poland and Romania had only a 4% share of theatrical films.

Share of theatrical films on FOD by country in 2024
in percentage of all films available

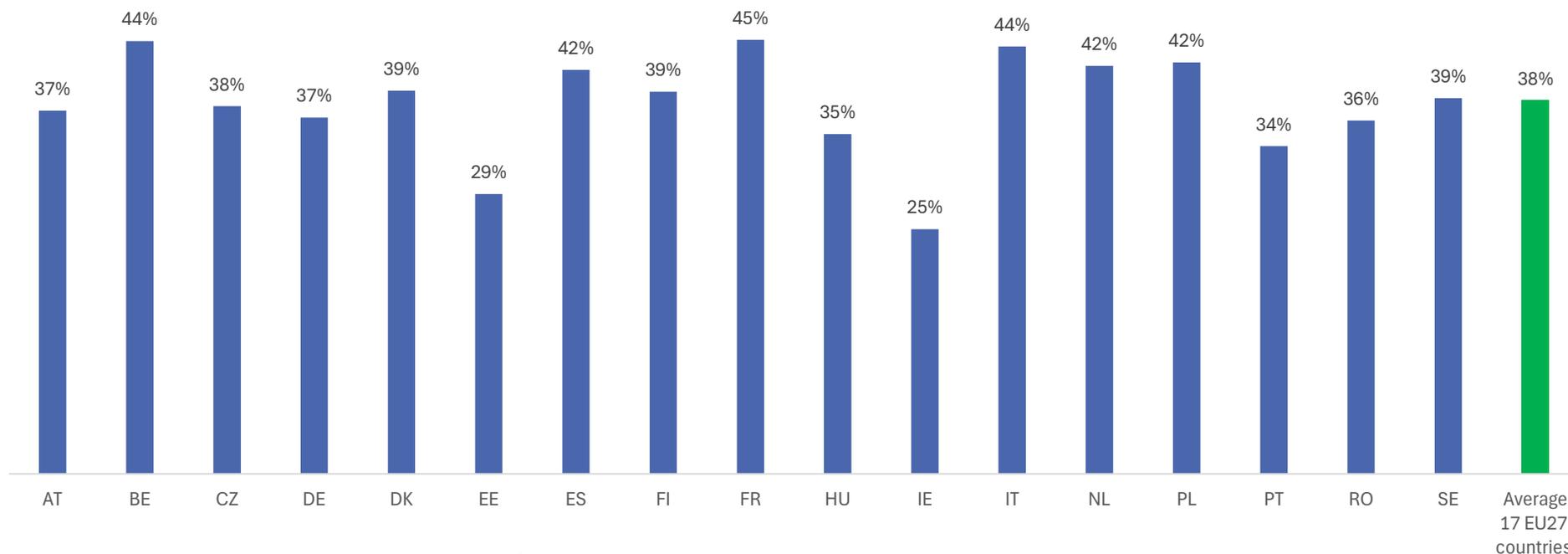


Source: European Audiovisual Observatory, LUMIERE, JustWatch, Mediapress

Share of theatrical films in exploitation on SVOD by country

- On average, theatrical films accounted for 38% of SVOD catalogues across the 17 countries examined, with the highest share (45%) found in France and the lowest (25%) in Ireland.
- Ireland and Estonia had notably lower shares of theatrical releases in their SVOD catalogues, at 25% and 29% respectively.
- Therefore, the majority of films in SVOD catalogues are films without a theatrical release in the EU, such as original productions by streaming services, films acquired from outside Europe that have had a theatrical release in other regions, TV fiction films, and 'direct-to-video' films.

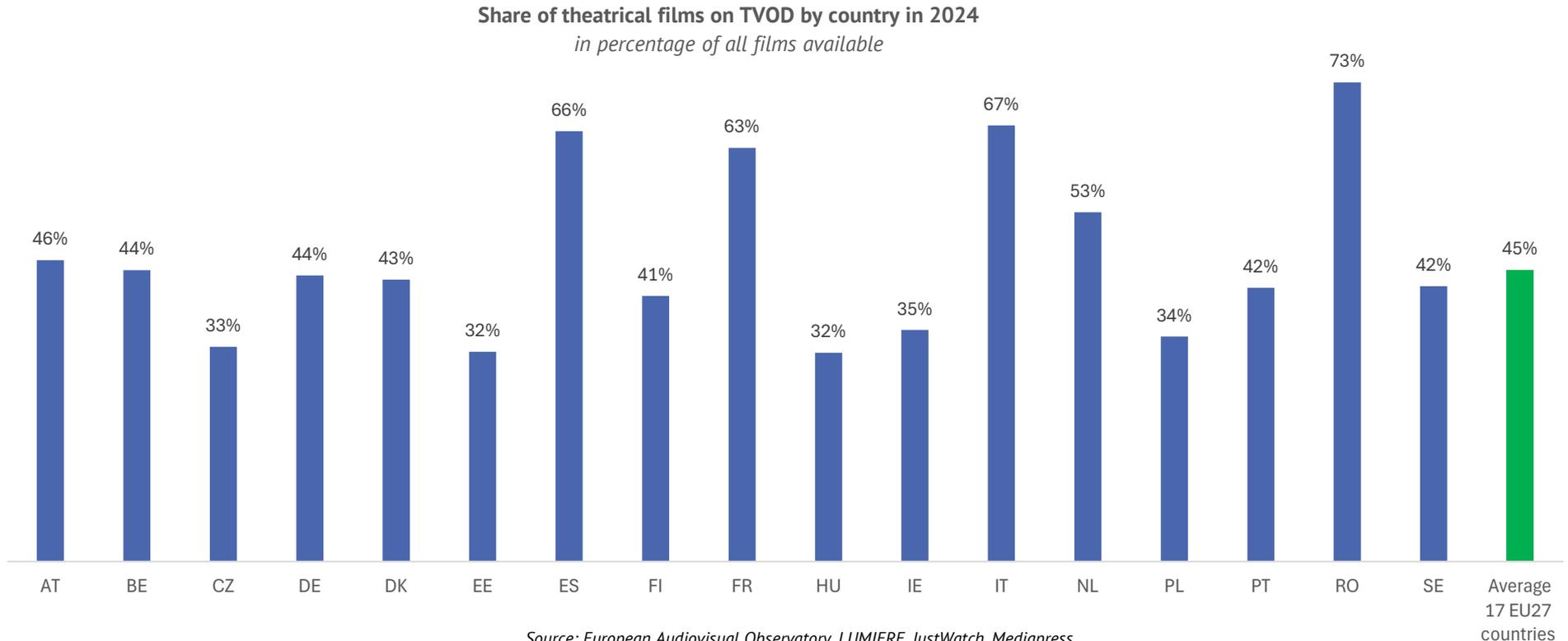
Share of theatrical films on SVOD by country in 2024
in percentage of all films available



Source: European Audiovisual Observatory, LUMIERE, JustWatch, Mediapress

Share of theatrical films in exploitation on TVOD by country

- On average, TVOD catalogues had a 45% share of theatrical films, though there were strong variations between countries.
- In Romania, Italy, France and Spain, over 60% of all available films had a theatrical release in the EU.
- By contrast, the share of theatrical films in the TVOD catalogues of Ireland, Poland, Czechia, Estonia and Hungary was lower than 35%.
- As previously mentioned, except for EU27 films, the proportion of theatrical films in TVOD catalogues was below 50% for all regions of origin. In four countries, TVOD services were mainly used to distribute theatrical films; in the other thirteen countries, they mainly distributed films without a theatrical release in the EU, which could indicate distribution of films with theatrical releases elsewhere and of 'direct-to-video' and TV fiction films.



PART B

Access of theatrical films on release in EU27 cinemas in 2022 to TV and VOD services in 2023

▪ **Methodology – data setting**

- Films with a **production date from 1996 to 2022 on release in EU27 cinemas in 2022**
 - Distinction of theatrical films produced between 1996 to 2017 (catalogue films - more than 5 years) and films produced between 2018 and 2022 (recent films – less than 5 years)
- **Theatrical films broadcast on TV in 2023** in the EU17.
- **Theatrical films available in FOD, TVOD and SVOD catalogues in 2023** in the EU17.

- **A film is counted once for each distribution window (TV, FOD, TVOD and SVOD) and for each country.**
 - A film can be present up to four times in the same country (on TV, FOD, TVOD and SVOD).
 - Several broadcasts of a film in the same country are counted once.
 - A film's multiple presence during the year is counted once, for FOD, SVOD and for TVOD.

- **Theatrical release data of films in the EU27 in 2022** was retrieved through LUMIERE.
 - Minimum 1 000 admissions in EU27 in 2022

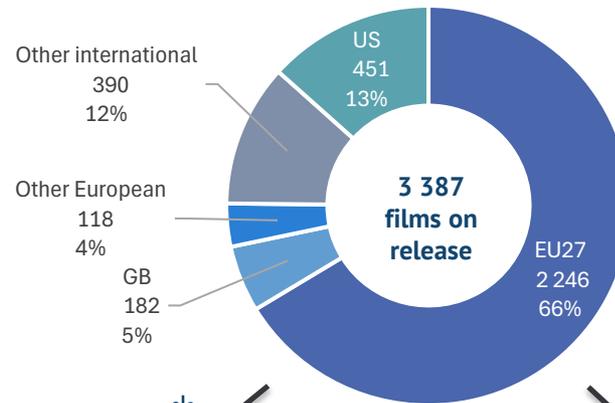
Theatrical films on release in EU27 in 2022 – over 3 000 films on release in cinemas with at least 1 000 admissions

- In 2022, 3 387 films from all regions of origin were released in cinemas in at least one EU27 country and had at least 1 000 admissions.
- European films accounted for 75% of all films on release in EU cinemas.
- Of these films, 87% (2 961) were recent films with a production date in 2018 or later.

3 387 film titles on release in EU27 cinemas in 2022 by region of origin

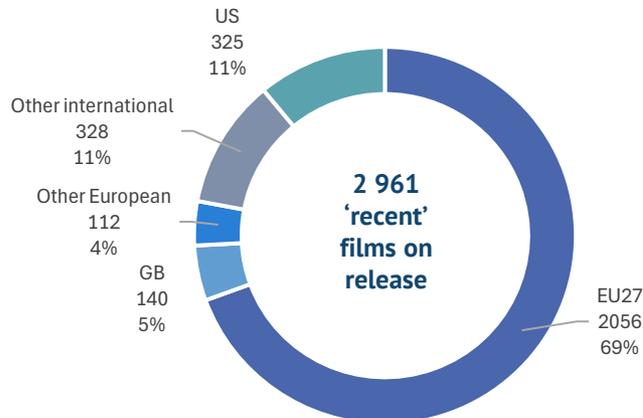
minimum admissions 1 000 in EU27 in 2022

Production date 1996-2022

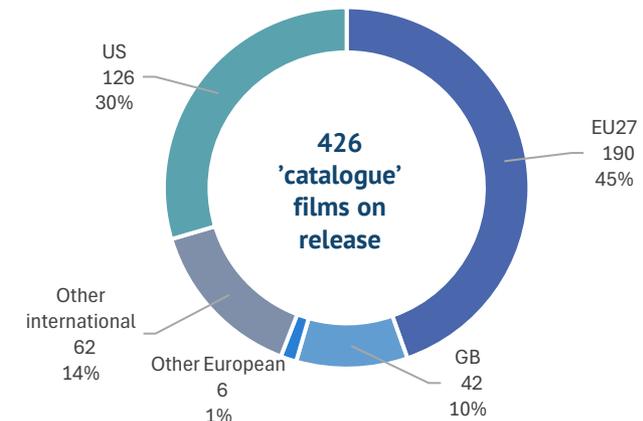


- Overall, films from the EU27 accounted for 66% of all films released, and 69% of more recent releases.
- The proportion of US films was similar to that of other international films (13% and 12% overall, and 11% for recent films in both regions of origin).
- However, twice as many US catalogue films were released as other international catalogue films.

2 961 film titles produced 2018-2022 on release in EU27 cinemas
minimum admissions 1 000 in EU27 in 2022



426 film titles produced 1996-2017 on release in EU27 cinemas
minimum admissions 1 000 in EU27 in 2022

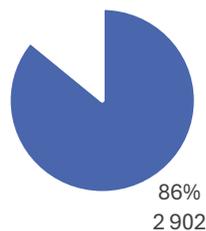


- In 2022, EU27 and US films accounted for the largest proportion of catalogue films released, representing 45% and 30%, respectively, of all catalogue theatrical films in EU cinemas.
- Other international, US and GB films accounted for a higher proportion of catalogue films than recent films.
- Only films from the EU27 and other European countries had a smaller share of catalogue films than recent films on release in 2022.

How many theatrical films on release in 2022 in EU27 cinemas are made available on TV and VOD?

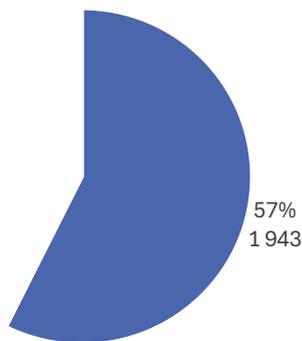
- SVOD services offered the largest selection of 2022 theatrical films, with 79% of titles available in at least one country. TVOD services followed closely behind, offering 77% of theatrical releases.
- Meanwhile, linear TV broadcast more than half of all theatrical releases in 2022, while FOD services offered fewer than a quarter.

TV and VOD- Share of 2022 theatrical films broadcast/available in 2023
in share and number of theatrical films on release in EU27 2022 available

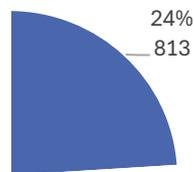


- When all four distribution windows are considered, 86% of theatrical titles released in 2022 were available in at least one window and in at least one country in 2023. This demonstrates that the value chain continues after a theatrical release and that theatrical films extend their lifespan by being released in other windows, mostly in the pay VOD window.

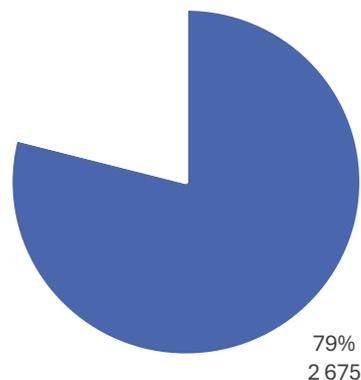
Linear TV - Share of 2022 theatrical films broadcast in 2023
in share and number of theatrical films on release in EU27 2022 broadcast



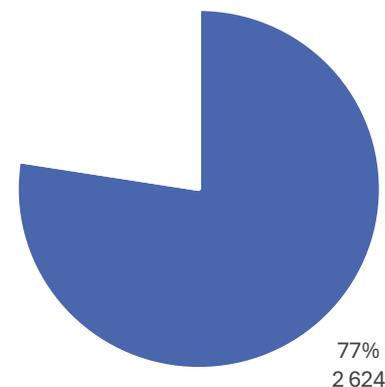
FOD- Share of 2022 theatrical films available in 2023
in share and number of theatrical films on release in EU27 2022 available



SVOD- Share of 2022 theatrical films available in 2023
in share and number of theatrical films on release in EU27 2022 available



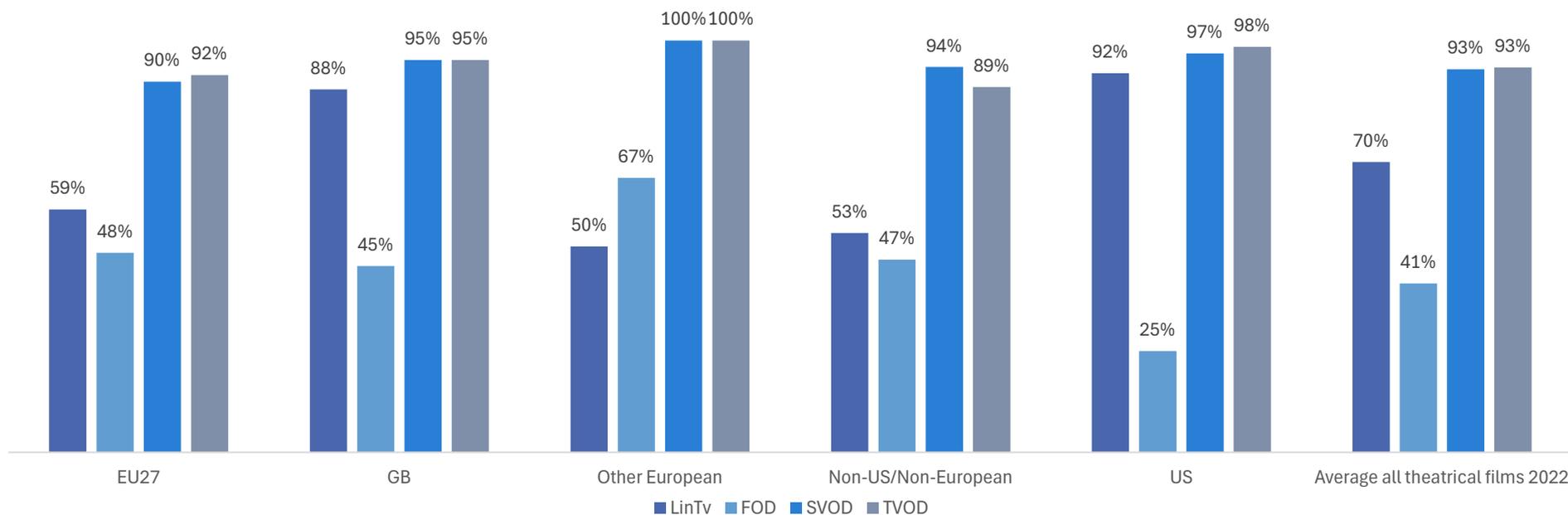
TVOD- Share of 2022 theatrical films available in 2023
in share and number of theatrical films on release in EU27 2022 available



More than 90% of theatrical catalogue films were available on SVOD and TVOD, 70% on linear TV and less than half on FOD

- As expected, pay VOD services (SVOD and TVOD) offered the greatest proportion of theatrical catalogue films in EU27 cinemas upon release in 2022, with 93% of all catalogue titles available in the pay VOD window in at least one country.
- By contrast, FOD services offered the lowest proportion of theatrical catalogue films on release, with just 41% available in the free VOD window in at least one country.
- Linear TV channels broadcast 70% of all theatrical catalogue films on release in 2022.
- Of EU27 theatrical catalogue films on release in 2022, the highest proportion was available on TVOD services, followed by SVOD services, linear TV and FOD services.

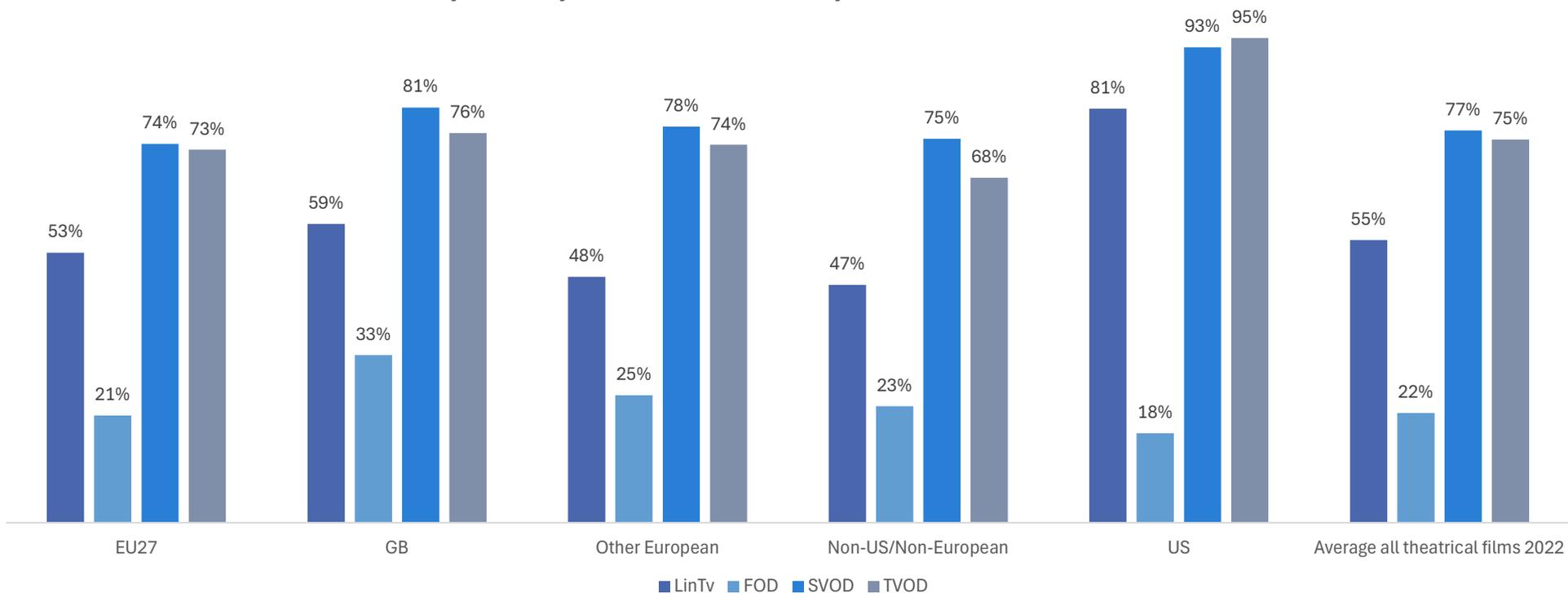
Share of theatrical films produced 1996-2017, on release in EU27 cinemas in 2022, available by window and region of origin in 2023
in share of theatrical films available/broadcast out of total on release in EU27 cinemas in 2022



Over ¾ of recent theatrical films were available on SVOD and TVOD, over half on linear TV and less than ¼ on FOD services

- SVOD services had the highest share of recent theatrical films available in at least one country, with 77% of all recent films released in 2022 being available. This was followed by TVOD services with 75%, linear TV with 55%, and FOD services with less than a quarter (22%).
- US theatrical films released in EU27 cinemas in 2022 were most widely available on TVOD services (95%), followed closely by SVOD services (93%) and linear TV channels (81%). Unsurprisingly, fewer than 20% of recent US theatrical films were available on FOD services.
- SVOD and TVOD services had the highest share of availability for recent EU27 theatrical films, at 74% and 73% respectively. Slightly over half were available on linear TV (53%), and around one-fifth (21%) on FOD services.
- Among recent European films (EU27, GB and other European origin), British films had the highest share of availability across all four platforms.

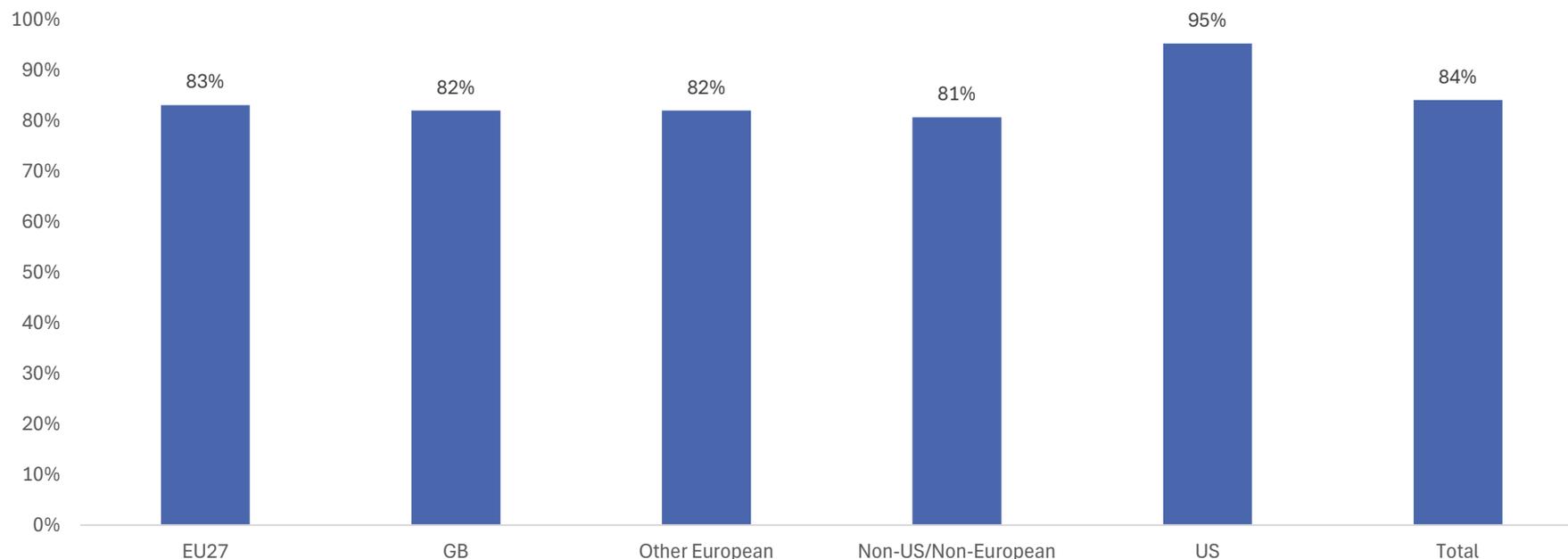
Share of theatrical films produced 2018-2022, on release in EU27 cinemas in 2022, available by window and region of origin in 2023
in share of theatrical films available/broadcast out of total on release in EU27 cinemas in 2022



On average, 84% of all recent films released in 2022 in EU27 were available in at least one window in 2023

- In 2023, 83% of all recent theatrical films released in EU27 cinemas in 2022 were available in at least one window. For US films, the proportion of recent theatrical films available in at least one window was even higher, at 95%. However, the number of US recent theatrical films (325 titles) released in cinemas in 2022 was much lower than EU27 films (2 056 titles).
- On average, around 82% of recent theatrical films released in 2022 from other regions were accessible to viewers in at least one window.
- This demonstrates that for recent theatrical films, with at least 1 000 admissions in 2022, a large share is made available in another exploitation window one year after being on release in cinemas.

Share of 2022 theatrical films produced 2018-2022 available in at least one window in 2023
in share of theatrical films available/broadcast out of total on release in EU27 cinemas in 2022



▪ **Methodology – data setting**

- Films with a **production date from 1996 to 2022 on release in EU27 cinemas in 2022**
 - Distinction of theatrical films produced between 1996 to 2017 (catalogue films - more than 5 years) and films produced between 2018 and 2022 (recent films – less than 5 years)
- **Theatrical films broadcast on TV in 2023** in the EU17.
- **Theatrical films available in FOD, TVOD and SVOD catalogues in 2023** in the EU17.

- **A film is counted once for each distribution window (TV, FOD, TVOD and SVOD) and for each country.**
 - A film can be present up to four times in the same country (on TV, FOD, TVOD and SVOD).
 - Several broadcasts of a film in the same country are counted once.
 - A film's multiple presence during the year is counted once, for FOD, SVOD and for TVOD.

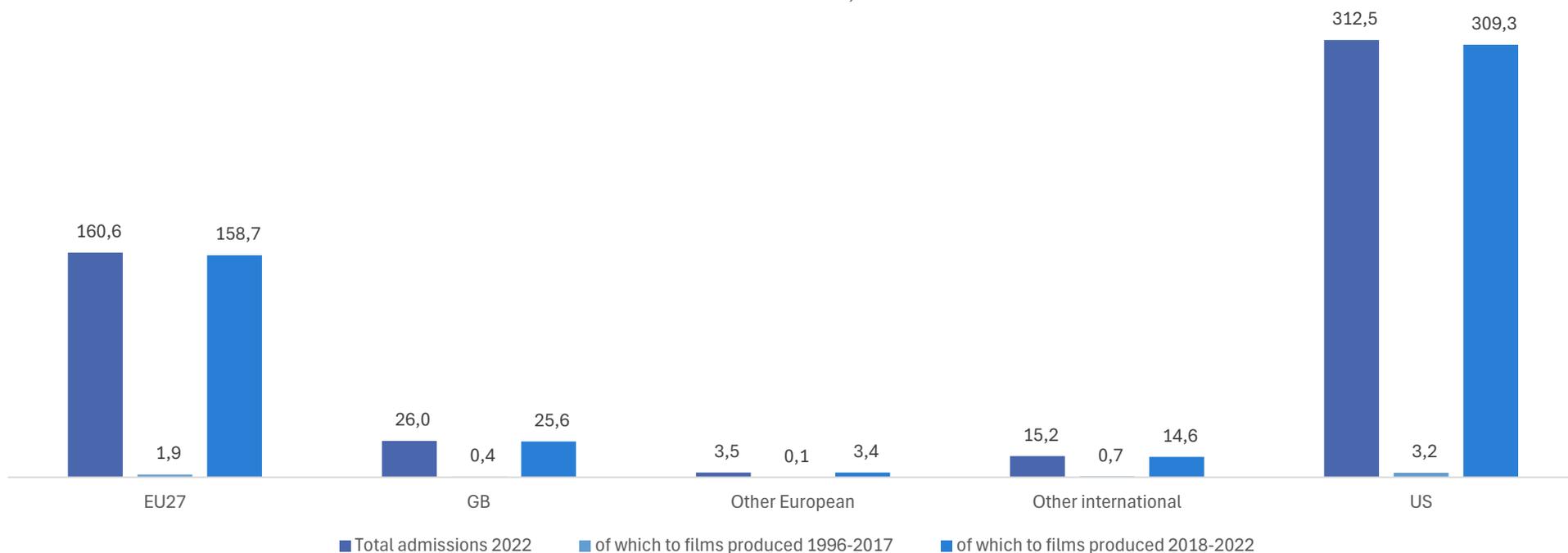
- **Theatrical release data of films in the EU27 in 2022** was retrieved through LUMIERE.
 - Minimum 1 000 admissions in EU27 in 2022

B.2. In 2022, European films accounted for 37% of all admissions, while US films accounted for 60%, most admissions are to recent films

- In 2022, films released in EU27 cinemas that achieved a minimum of 1 000 admissions generated a total of 517.8 million admissions. Of these, 98.8% went to recent films (produced between 2018 and 2022), accounting for 511.5 million admissions.
- As expected, US films accounted for 60% of all admissions, followed by EU27 films (31%), British films (5%), other international films (3%), and other European films (1%). Overall, European films accounted for 37% of all film admissions in the EU in 2022. As recent films generated the bulk of admissions in 2022, these shares correspond also to the shares by region of origin of recent films.
- It is interesting to note that, for catalogue films which only represented 1.2% of admissions, other international films vastly improved their share compared to recent films, garnering 10% of all catalogue film admissions, while US films garnered a lesser share with 51%.

Admissions to films on release in EU27 cinemas in 2022, by region of origin

minimum admissions 1 000 in 2022, in million admissions

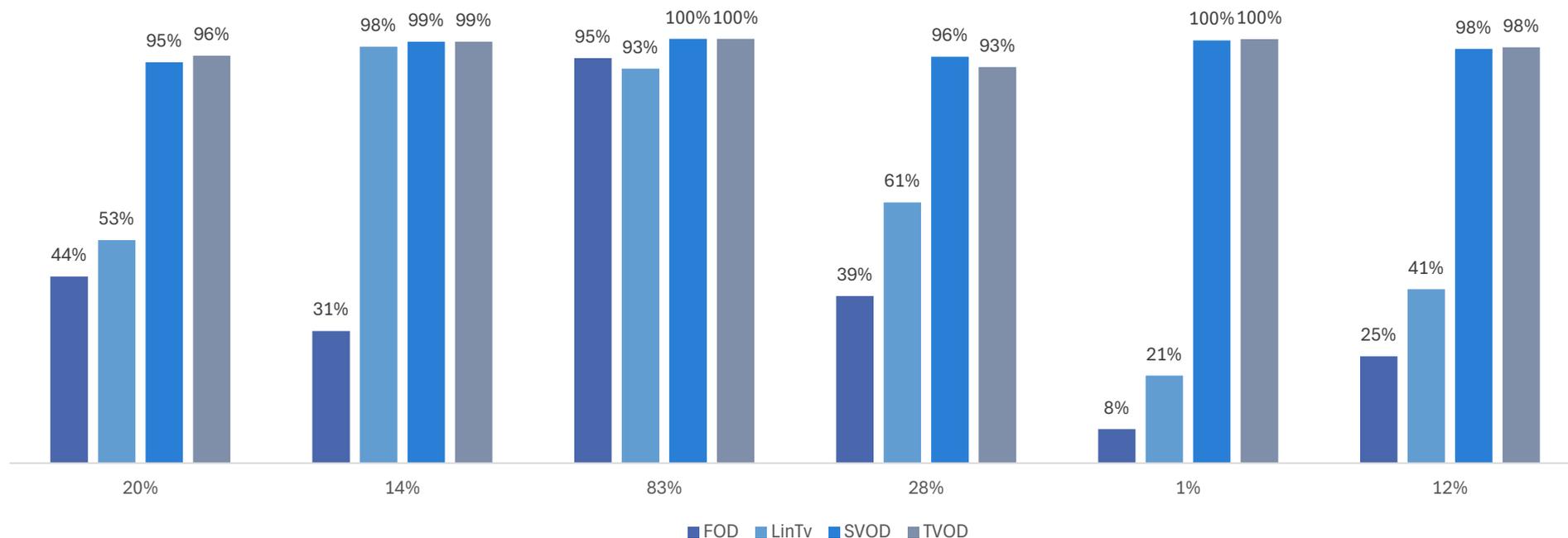


Source: European Audiovisual Observatory, LUMIERE

How many admissions to theatrical catalogue films on release in 2022 are made available on TV and VOD in 2023?

- With their extensive film catalogues, SVOD and TVOD services accounted for 98% of admissions to theatrical catalogue films on release in 2022, as well as all admissions to US and other European catalogue films.
- Linear TV broadcasts of theatrical catalogue films accounted for 41% of admissions to these films in 2022, with significant variation among films from different regions. Broadcasts of British and other European theatrical catalogue films accounted for 98% and 93% of their admissions in 2022, respectively, while broadcasts of EU27 theatrical catalogue films accounted for 53%. Broadcasts of US theatrical catalogue films represented only 21% of their 2022 admissions.
- On FOD services, which have a more limited selection, mostly of older works, a quarter of theatrical catalogue film admissions in 2022 were available to viewers. The highest percentage of admissions in 2022 represented by theatrical catalogue films on FOD services was for other European films, whereas only 8% of admissions to US theatrical catalogue films in 2022 were available on FOD services.

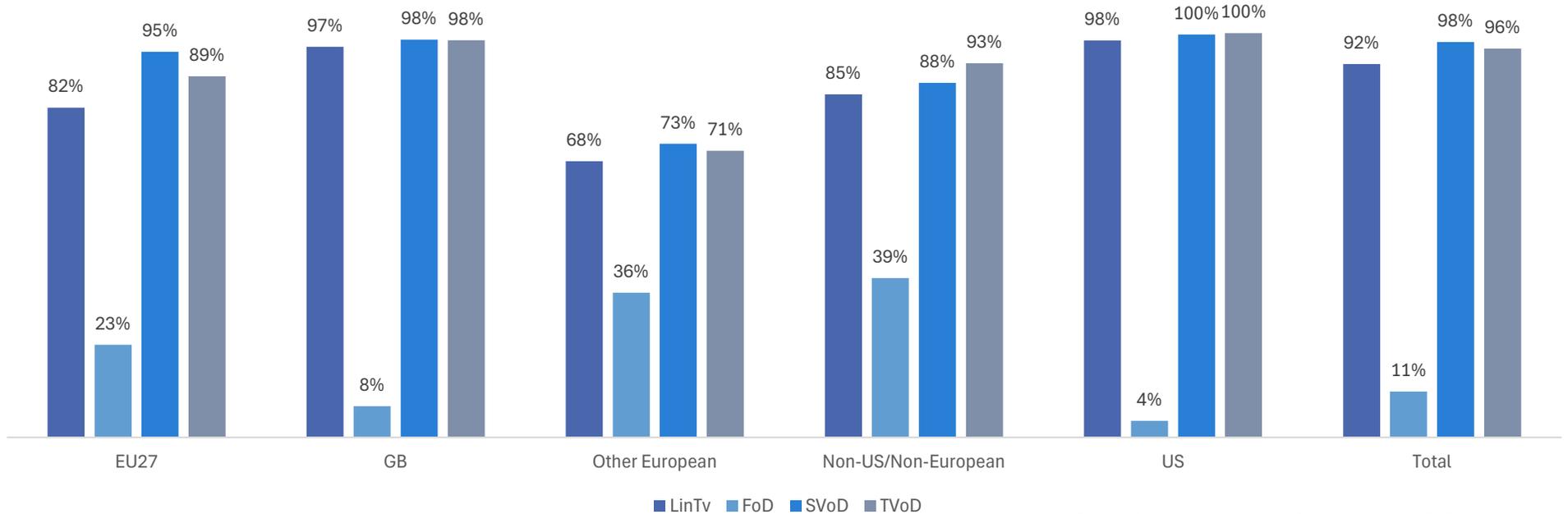
Share of 2022 admissions for films produced 1996-2017 on release in EU27 available by window in 2023 and by region of origin in 2023
In share of 2022 admissions



How many admissions to recent theatrical films on release in 2022 are made available on TV and VOD in 2023?

- Admissions to recent theatrical films in 2022 are well represented in three out of four distribution windows in 2023. Over 90% of admissions to recent films in 2022 are available on SVOD (98%), 96% on TVOD and 92% on linear TV (mostly through pay-TV channels). Unsurprisingly, as FOD services mostly offer older works, only 11% of recent theatrical films' 2022 admissions were represented in their catalogues.
- Almost all US and British recent theatrical films' 2022 admissions were available/broadcast on pay VOD and linear TV (with distribution mostly on pay-TV).
- For recent theatrical films from the EU27, the highest share of admissions from 2022 was found on SVOD services, with 95% of admissions represented in their catalogues. This was followed by TVOD services with 89%, and TV with 82%.
- The highest proportion of admissions for recent films available on FOD services were for films from other European regions and non-US/non-European films. These films may have fewer exclusivity deals with VOD and pay-TV providers, or they may be less popular than films from other regions and thus more accessible to license for FOD services.

Share of 2022 admissions for films produced 2018-2022 on release in EU27 available by window in 2023 and by region of origin
In share of 2022 admissions



On average and range of admissions of theatrical catalogue and recent films available on linear TV and VOD services.

▪ For theatrical catalogue films (produced between 1996 and 2017, see next slide)

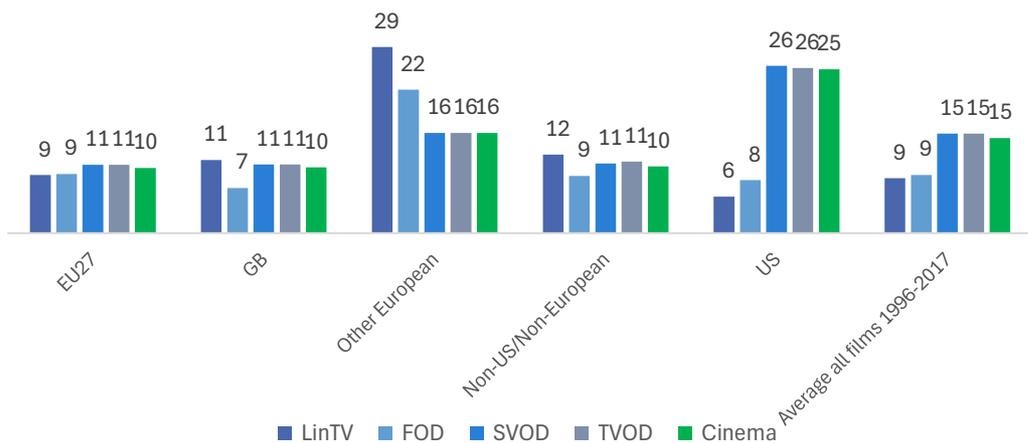
- Unsurprisingly, the average number of admissions in 2022 was lower for all four distribution platforms. On average, catalogue films had 15 000 admissions in cinemas in 2022, which corresponds to the average admissions of theatrical catalogue films available on SVOD and TVOD services. On linear TV and FOD services, the average number of admissions for theatrical films broadcast or available was lower at 9 000.
- The highest-performing EU27 theatrical catalogue films in cinemas (with admissions above 50 000) were also available on SVOD and TVOD services, whereas linear TV and FOD services only had half of the highest-performing EU27 catalogue films.
- Furthermore, SVOD and TVOD services carried 160 and 163 EU27 catalogue films with 2022 admissions below 50 000 – a significant proportion of the 179 least successful EU27 catalogue films released in cinemas in 2022. Meanwhile, linear TV broadcast 106 of these least successful titles, and 87 were made available on FOD services.

▪ For recent theatrical films (produced in or after 2018, see the two slides after next one)

- With the exception of FOD services, pay VOD services and linear TV channels, on average, made available or broadcast recent theatrical films that had above-average admissions compared to the average 2022 cinema admission rate. This is true for films of all regions of origin, which indicates curation or selection of theatrical films.
- This is particularly apparent with regard to EU27 films, as most of the most commercially successful recent EU27 theatrical films (with admissions above 50 000) were made available on pay VOD and linear TV. Furthermore, all EU27 'blockbusters' (with 2022 admissions above one million) were made available on SVOD services and 89% on linear TV and TVOD services. This was not the case for FOD services, which only had 16% of these EU27 blockbusters, mostly on public or commercial replay services.
- On average, linear TV channels had the films with the highest admissions of all four distribution windows, showing that a successful commercial run could be essential for television broadcast.
- Of the recent EU27 theatrical films available, most had admissions below 50 000 during their 2022 cinema release (76% of all recent EU27 films). These films therefore represent the largest proportion of recent EU27 films available in other exploitation windows in 2023, ranging from 64% of theatrical films broadcast on linear TV to 76% on FOD services.
- Interestingly, while the average admissions for a recent US theatrical film available on pay VOD and linear TV were above one million (not far from the 2022 cinema average of 952 000), the average was only 223 000 on FOD services, showing that access to recent Hollywood blockbusters on FOD services remains rare.

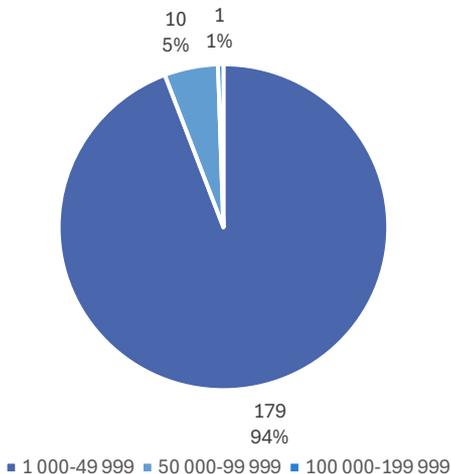
Average admissions of theatrical catalogue films available on TV and on VOD and range of admissions of EU27 films

Average 2022 admissions to theatrical films produced 1996-2017 on release in EU27 in 2022 by window by region of origin
in average admissions in thousands per theatrical film available/broadcast/on release

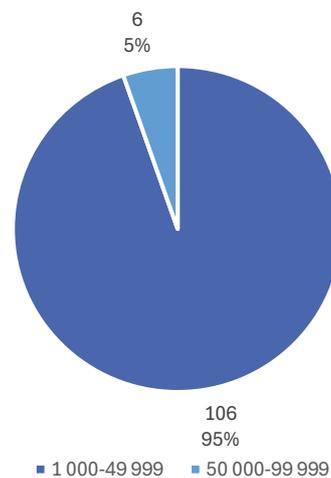


■ LinTV ■ FOD ■ SVOD ■ TVOD ■ Cinema

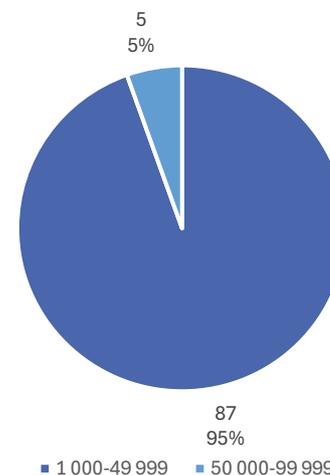
Cinema – Range of admissions in number of EU27 1996-2017 films on release



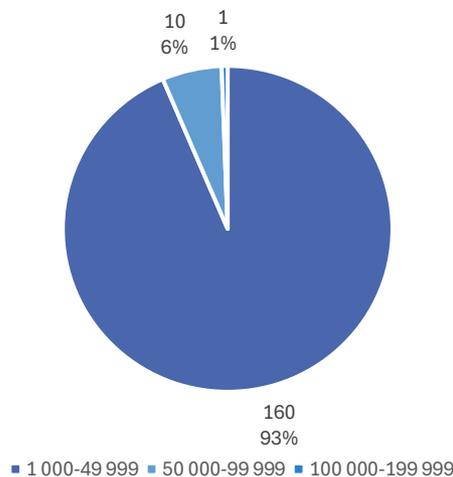
Linear TV – Range of admissions in number of EU27 films 1996-2017 broadcast



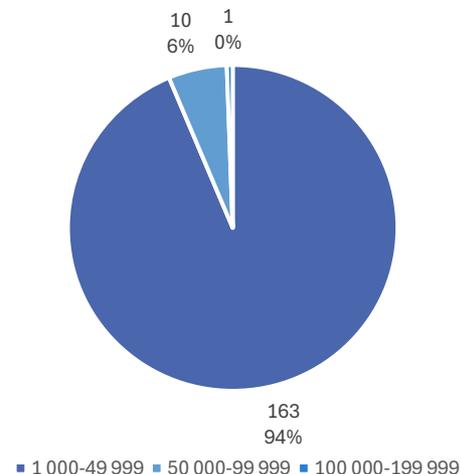
FOD – Range of admissions in number of EU27 films 1996-2017 available



SVOD – Range of admissions in number of EU27 1996-2017 films available



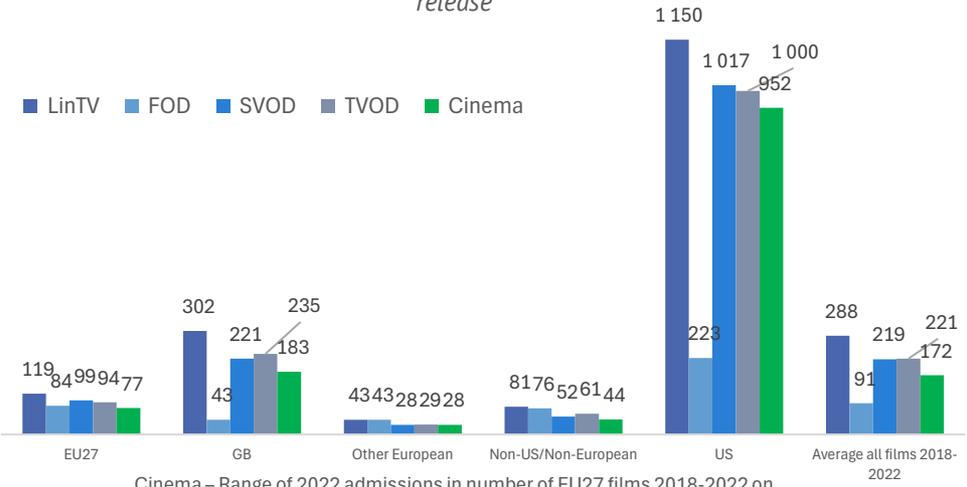
TVOD – Range of admissions in number of EU27 1996-2017 films available



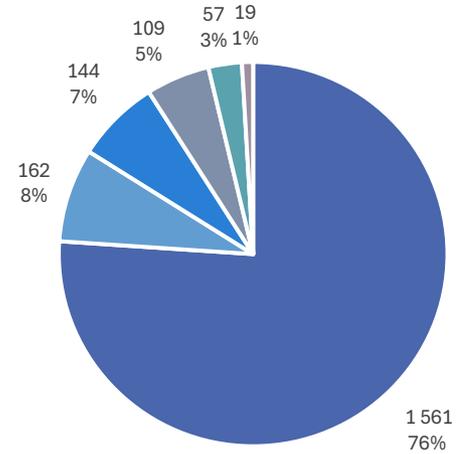
Average admissions of recent theatrical films available on TV and on VOD and range of admission of EU27 films

Average 2022 admissions to theatrical films produced 2018-2022 on release in EU27 in 2022 by window by region of origin

in average admissions in thousands per theatrical film available/broadcast/on release

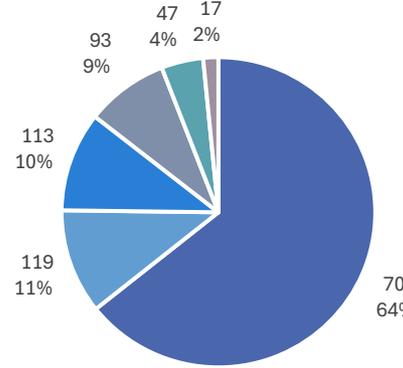


Cinema – Range of 2022 admissions in number of EU27 films 2018-2022 on release



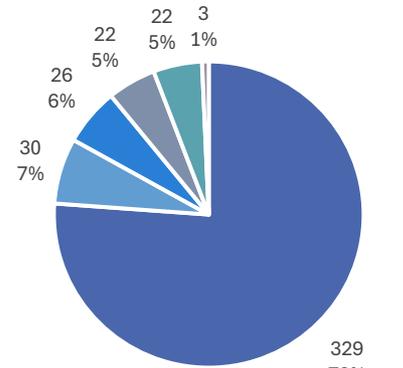
Legend for Cinema: 1 000-49 999, 50 000-99 999, 100 000-199 999, 200 000-499 999, 500 000 -999 999, >1 million

LinTV – Range of admissions in number of EU27 films 2018-2022 available



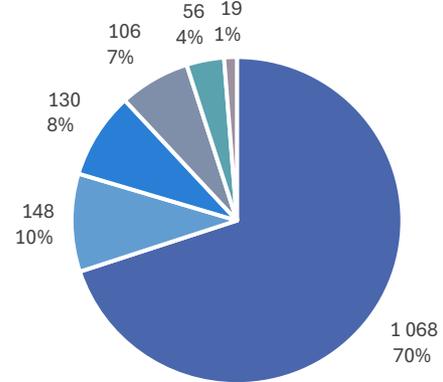
Legend for LinTV: 1 000-49 999, 50 000-99 999, 100 000-199 999, 200 000-499 999, 500 000 -999 999, >1 million

FOD – Range of admissions in number of EU27 films 2018-2022 available



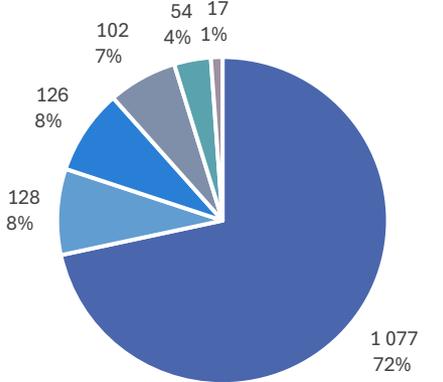
Legend for FOD: 1 000-49 999, 50 000-99 999, 100 000-199 999, 200 000-499 999, 500 000 -999 999, >1 million

SVOD – Range of admissions in number of EU27 films 2018-2022 available



Legend for SVOD: 1 000-49 999, 50 000-99 999, 100 000-199 999, 200 000-499 999, 500 000 -999 999, >1 million

TVOD – Range of admissions in number of EU27 films 2018-2022 available



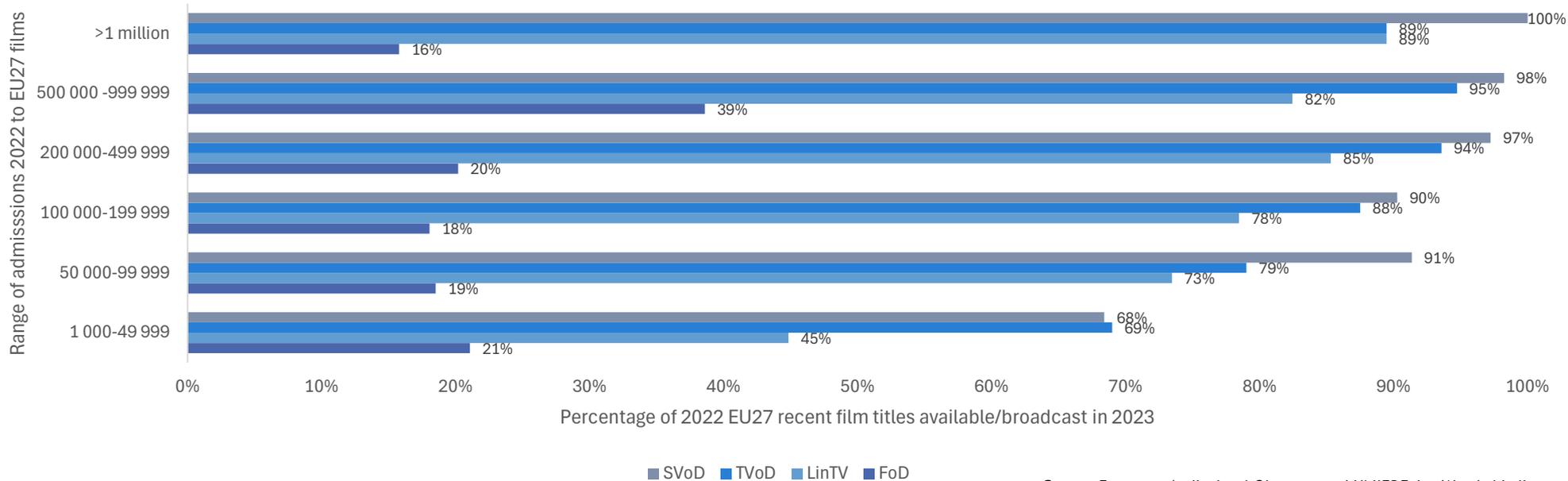
Legend for TVOD: 1 000-49 999, 50 000-99 999, 100 000-199 999, 200 000-499 999, 500 000 -999 999, >1 million

Source: European Audiovisual Observatory, LUMIERE, JustWatch, Mediapress

Commercially successful recent EU27 theatrical films are made available on pay VOD and linear TV

- All recent films from the EU27 with admissions of over one million were available on SVOD services and 89% were available on TVOD and linear TV services. Films with admissions levels between 500 000 and 1 million were available in shares ranging from 82% on linear TV to 98% on SVOD services, indicating that commercially successful recent EU27 films are distributed in the pay-VOD window as well as on linear TV. The low shares for FoD services show that exploiting recent theatrical films is not their core business model, except for free public and commercial broadcast services that acquire rights to exploit these titles on their digital platforms.
- Furthermore, more than 90% of EU27 recent theatrical films with admissions levels ranging from 50 000 to 500 000 were made available by SVOD services, and to a lesser extent by TVOD services and linear TV channels (from 73% to 94%). This shows that the exploitation of EU27 theatrical titles continues well after their theatrical run.
- For recent EU27 theatrical films with lower admission levels (from 1 000 to 500 000), pay VOD services still had a respectable availability share, at 68% for SVOD and 69% for TVOD services. In contrast, linear TV channels broadcast fewer than half of these titles, as they have less available inventory than VOD services and thus concentrate on EU27 theatrical films that are more successful, and thus have greater audience recognition and the capability of gathering more eyeballs in front of the TV screen.

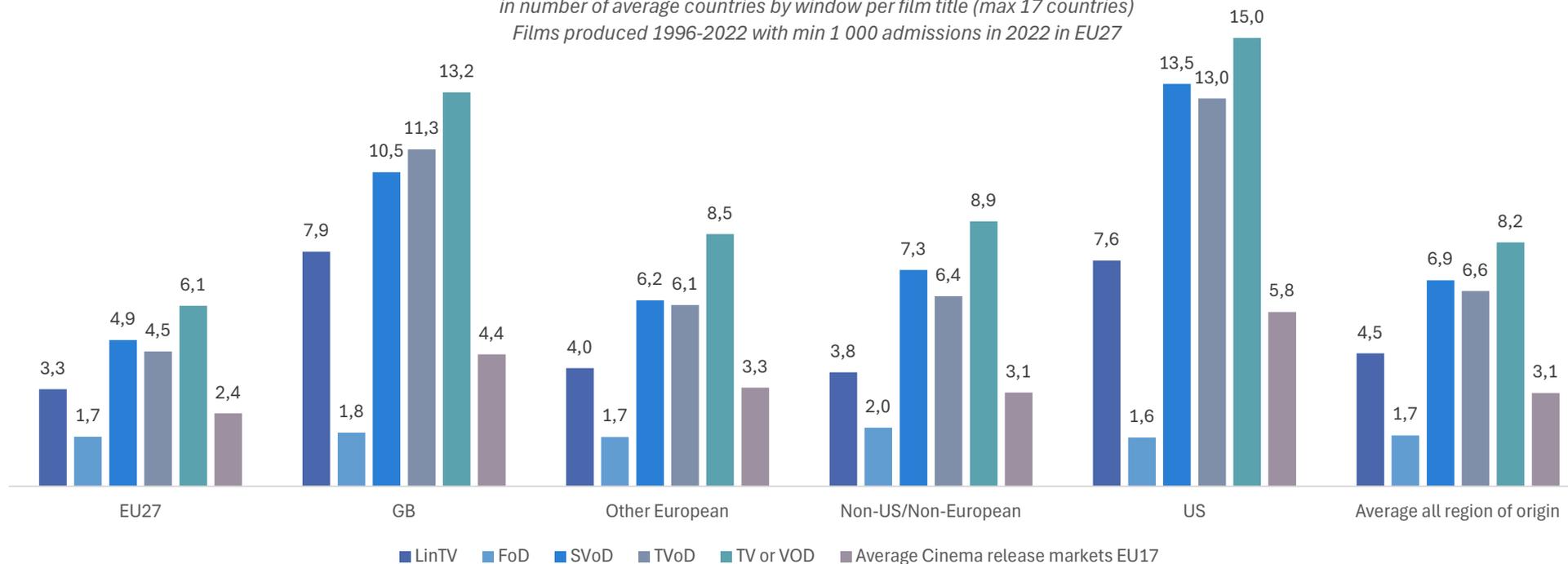
Percentage of EU27 recent theatrical films on release in 2022 available by distribution window and range of 2022 admissions in 2023
in percentages of EU27 recent theatrical film titles on release in 2022 in EU27 cinemas



B.3 Except for FOD, titles of all regions of origin widened their country distribution on TV and VOD compared to cinema

- The average number of countries in which films of all regions of origin were available improved in other distribution windows compared to the number of EU17 release markets in 2022, sometimes by a factor of two or more. SVOD services increased the country distribution of film titles for EU27, other European, non-US/non-European and US theatrical films more than during their cinema run.
- US and British theatrical films had the highest average country availability in cinemas, pay VOD, and linear TV distribution. EU27 films, with many more titles, had the lowest country circulation in cinemas and all windows (except on FOD where only US titles were less widely distributed).
- When linear TV and VOD services are considered together as a single distribution window, the reach across countries increases further, suggesting that in several EU17 countries, film titles were available either on linear TV or on pay VOD. These distribution windows thus interact to distribute theatrical films more widely across the EU17. This could also be a sign of exclusivity windows between the (mostly pay-) TV window and the various pay-VOD windows.

Average number of release markets in EU17 by window by region of origin
in number of average countries by window per film title (max 17 countries)
Films produced 1996-2022 with min 1 000 admissions in 2022 in EU27

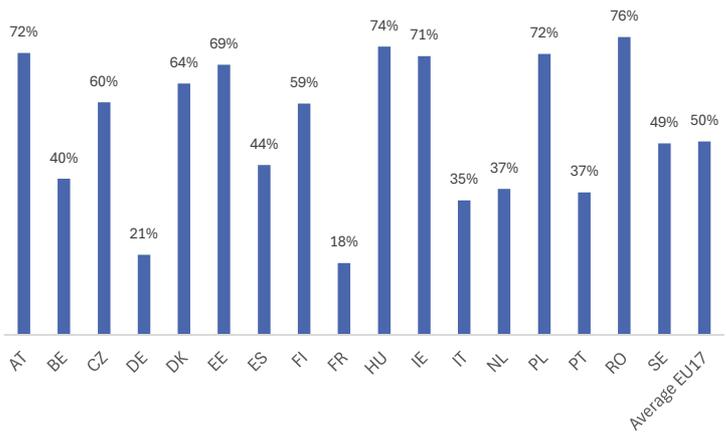


B.4. The impact of distribution windows in 2023 compared to cinema releases in the country in 2022 on the availability of EU27 theatrical films

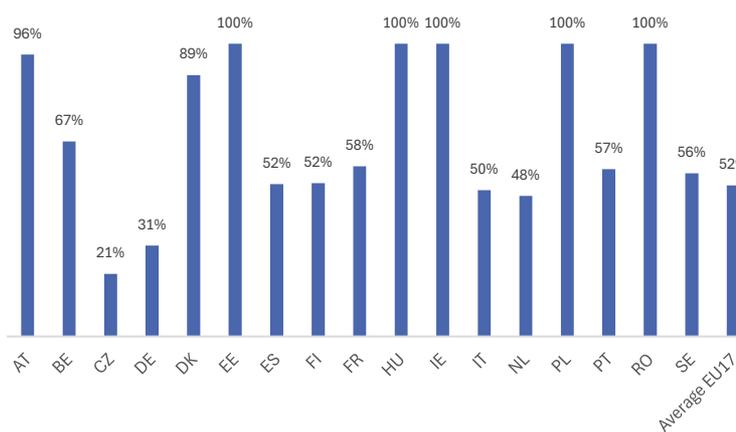
- **For EU27 theatrical films without a theatrical release in the country in 2022 and available in other distribution windows in 2023 in the country**
 - On average, more than half of films distributed through all four channels (between 50% on linear TV and 59% on SVOD services) did not have a theatrical release in their country of availability in 2022. This shows that VOD services and linear TV channels complement the cinema film offering for EU27 films.
 - Important theatrical markets in terms of admissions and the number of films released (France, Germany, Italy and Spain) had a smaller proportion of EU27 films without a theatrical release in the country (in France, for example, only 25% of all EU27 films available on TV and/or VOD did not have a theatrical release in 2022 in France).
 - Conversely, in smaller markets, more than 70% and up to 80% of all EU27 theatrical films available on VOD or TV did not have a theatrical release in the country in 2022, meaning that VOD services and TV channels expanded the selection of EU27 theatrical films in these countries available to viewers.
- **For EU27 theatrical films with a theatrical release in the country in 2022 and available in other distribution windows in 2023 in the country**
 - However, on average, most EU27 theatrical films released in a given country in 2022 are made available later in another distribution window in the country. In 2023, an average of 82% of EU27 films released in a country were available on VOD and/or TV (with variations ranging from 38% in Romania to 99% in Denmark).
 - On average, TVOD and SVOD services offer 68% and 66%, respectively, of all theatrical films released one year prior, while linear TV offers only 38% (with significant variations ranging from 2% in Ireland to 61% in Belgium and Poland), and FOD services offer just 8%.
- **On the impact of distribution of EU27 theatrical films in other windows in 2023 compared to the number of EU27 theatrical films on release in 2022 in the country**
 - On average, linear TV and/or VOD services vastly improved the availability of EU27 theatrical films for all distribution windows except FOD services (with the exception of Sweden due to the presence of a 'free' TVOD catalogue in the sample). This was achieved by offering EU27 theatrical films that were not released in the country in 2022. The increase was lowest in important cinema markets by size and number of theatrical releases (in France, for example, the combined TV and VOD offering of EU27 films increased by 'only' 125% compared to 2022 cinema releases), and highest in markets with a smaller number of theatrical releases (in Denmark, for instance, the combined TV and VOD offering increased by 493%).
 - This suggests that other exploitation windows for EU27 theatrical films significantly increase the availability of EU27 theatrical films for audiences and give a secondary chance to films without a theatrical run in a country.

Share of EU27 theatrical films available on TV and/or on VOD with no theatrical release 2022 in the country of TV or VOD

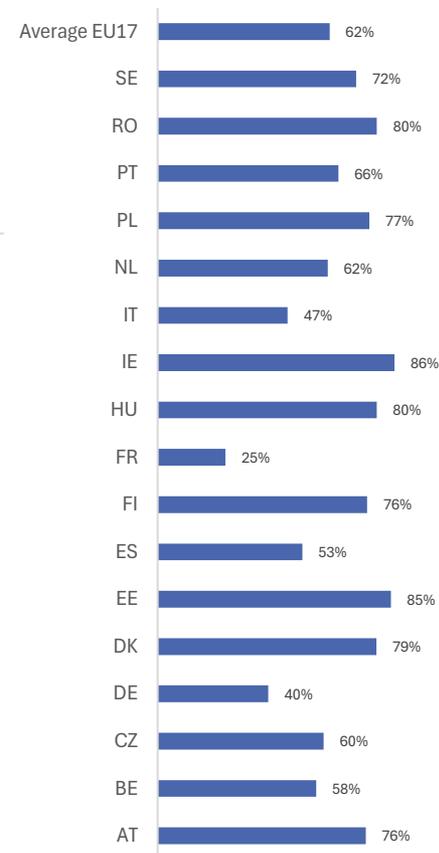
Linear TV - Share of EU27 2022 theatrical films broadcast without a theatrical release in the country
in percentage of total EU27 2022 theatrical films broadcast by country in 2023



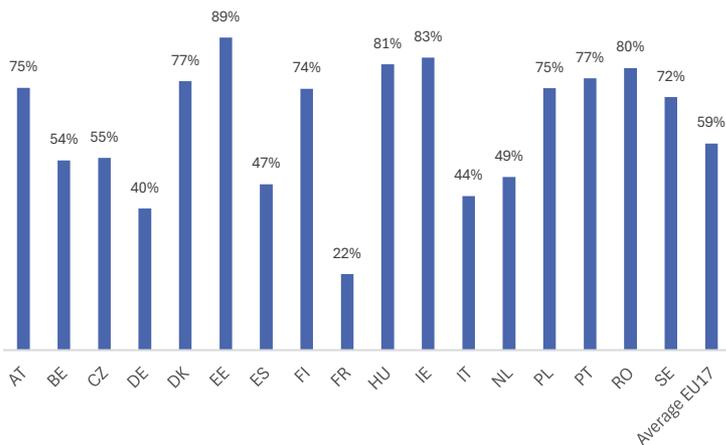
FOD - Share of EU27 2022 theatrical films available without a theatrical release in the country
in percentage of total EU27 2022 theatrical films available by country in 2023



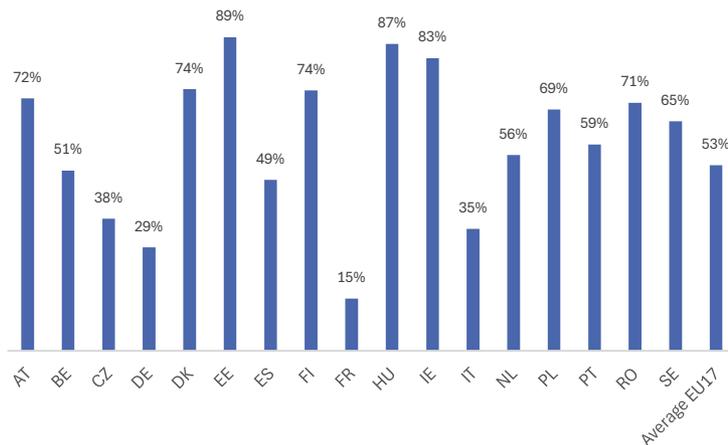
TV or VOD - Share of EU27 2022 theatrical films broadcast/available without a theatrical release in the country
in percentage of total EU27 2022 theatrical films broadcast/available by country in 2023



SVOD - Share of EU27 2022 theatrical films available without a theatrical release in the country
in percentage of total EU27 2022 theatrical films available by country in 2023

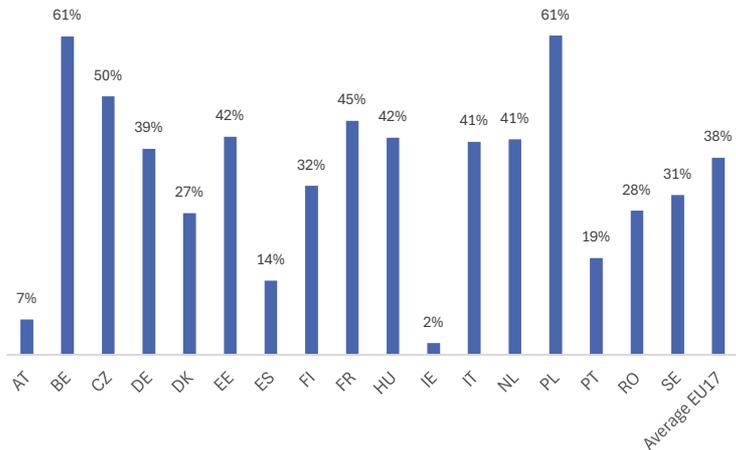


TVOD - Share of EU27 2022 theatrical films available without a theatrical release in the country
in percentage of total EU27 2022 theatrical films available by country in 2023

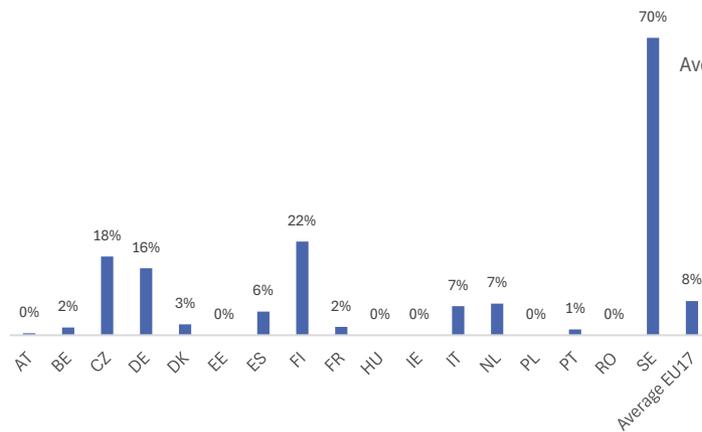


Share of EU27 theatrical films on release in country in 2022 and available in 2023 by window and country

LinTV –Share of EU27 theatrical films on release in the country and broadcast in 2023
in percentage of EU27 theatrical films on release in the country 2022



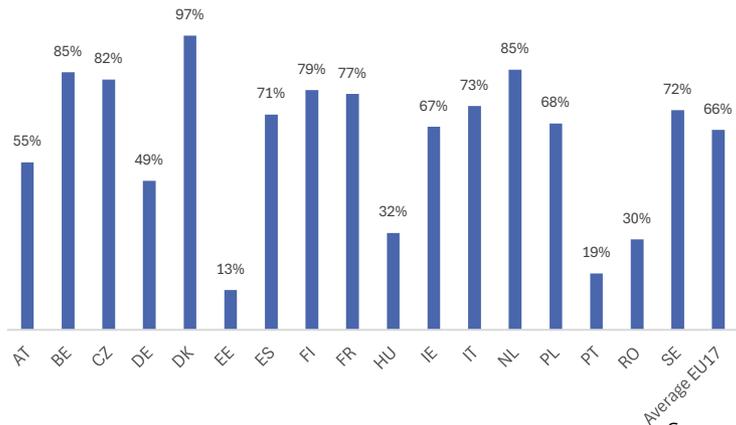
FOD –Share of EU27 theatrical films on release in the country and available in 2023
in percentage of EU27 theatrical films on release in the country 2022



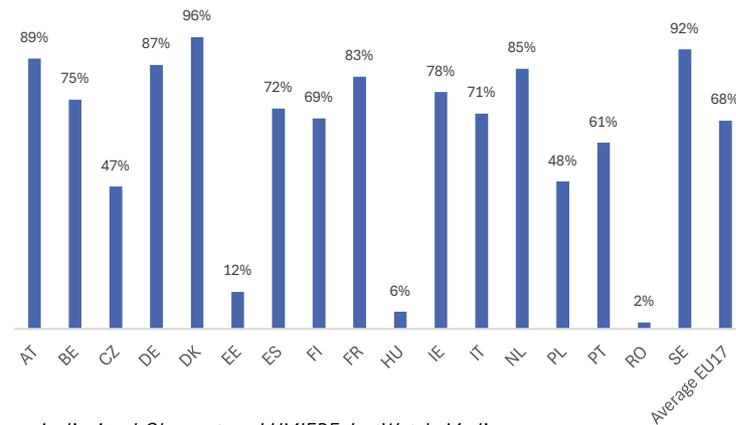
TV or VOD - Share of EU27 2022 theatrical films broadcast/available with a 2022 theatrical release in the country
in percentage of EU27 theatrical films on release in the country 2022



SVOD –Share of EU27 theatrical films on release in the country and available in 2023
in percentage of EU27 theatrical films on release in the country 2022

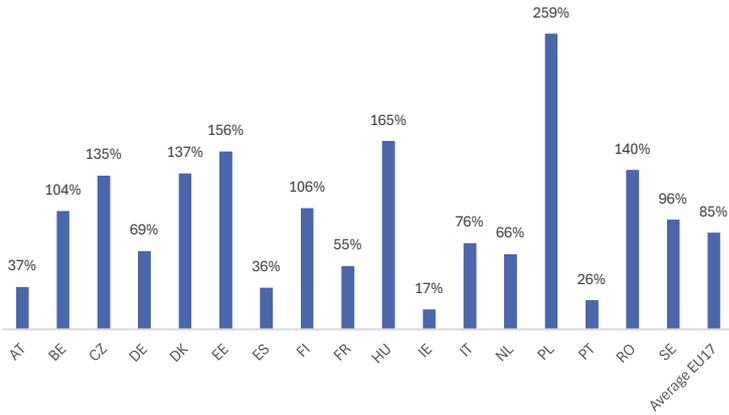


TVOD –Share of EU27 theatrical films on release in the country and available in 2023
in percentage of EU27 theatrical films on release in the country 2022

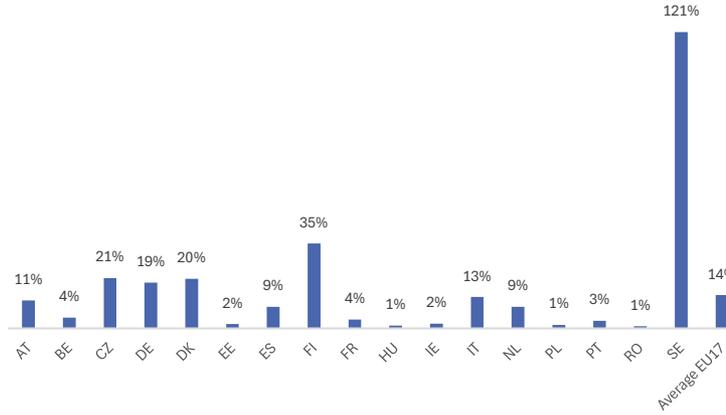


Share of theatrical films on release in 2022 in country compared to 2022 theatrical films available by window in country

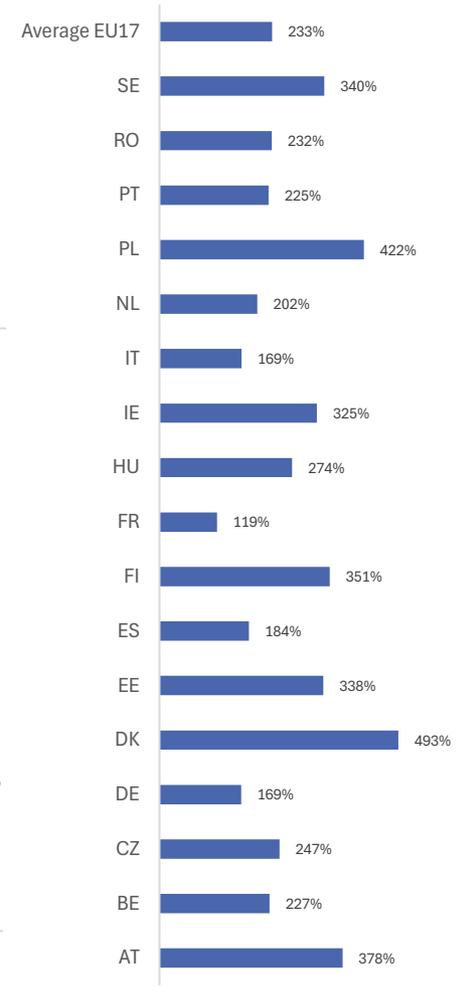
LinTV - Share of theatrical films 2022 broadcast compared to theatrical films on release in the country
all regions of origin, in % of films on release in cinemas in the country
2022



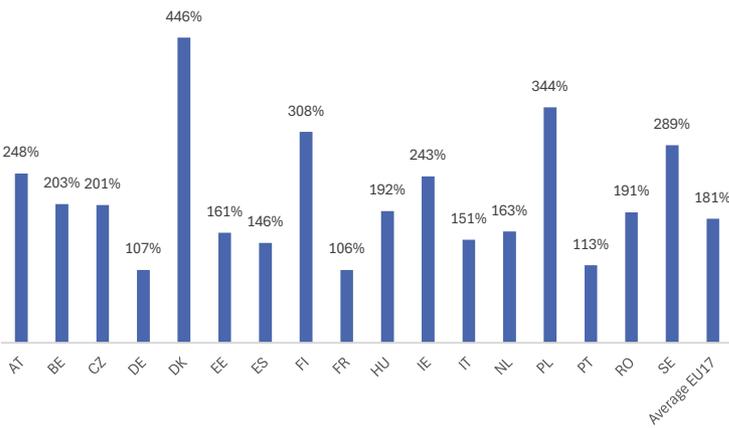
FOD - Share of theatrical films 2022 available compared to theatrical films on release in the country
all regions of origin, in % of films on release in cinemas in the country
2022



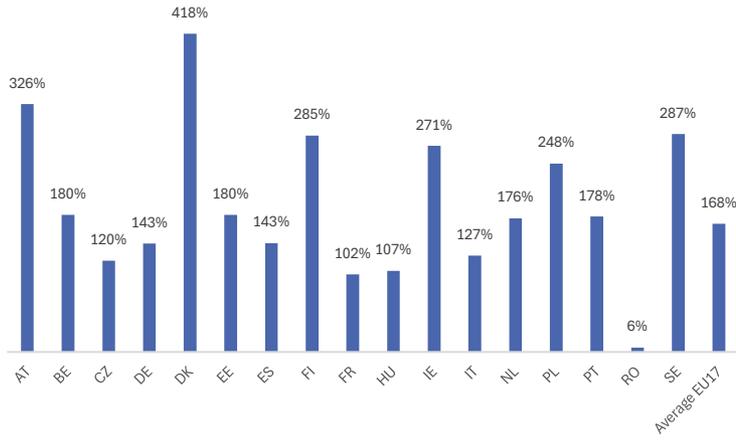
TV or VOD - Share of theatrical films 2022 available compared to theatrical films on release in the country
all regions of origin, in % of films on release in cinemas in the country
2022



SVOD - Share of theatrical films 2022 available compared to theatrical films on release in the country
all regions of origin, in % of films on release in cinemas in the country
2022



TVOD - Share of theatrical films 2022 available compared to theatrical films on release in the country
all regions of origin, in % of films on release in cinemas in the country
2022



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