

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

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Introduction

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

- A. A television and VOD services angle**, dedicated to the analysis of the film offer on TV and VOD, with the following research questions:
 1. What is the weight of theatrical film on TV and on VOD?
 2. What is the weight and origin of recent theatrical films?
 3. What are the main production countries among EU films?
- B. A film angle**, dedicated to the exploitation cycle, with the following research questions:
 1. How many theatrical films make it to TV and to VOD?
 2. What is the life cycle from cinemas to TV and VOD?
 3. To what extent are the same films exploited all throughout the European Union?
 4. Are films available simultaneously on TV, SVOD and TVOD?
- C. A consumer angle**, dedicated to the analysis of the volume of films accessible to a consumer in a given country, with the following research questions:
 1. What is the share of theatrical films that available on VOD and TV in each EU country?
 2. What is the share of theatrical films released in an EU country that are available on VOD and TV in the same EU country?
 3. To what extent do TV and VOD bring to a country films that have never been released in that country?

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 over the time period were available (hereafter EU17).
- **Counting of film presence:** The film presence analysis is done on a country basis per distribution window (TV, 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. At the beginning of each section, the data limits and count method are specified, as parameters vary through 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 Metaprofile
 - 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.

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

TV channels by country

Country	2018	2019	2020	2021	2022
AT	9	9	9	10	10
BE	5	5	5	5	24
CZ	18	20	39	41	45
DE	52	66	68	63	67
DK	3	5	6	5	14
EE	0	1	1	1	14
ES	42	44	44	38	44
FI	0	2	3	14	13
FR	38	39	37	38	72
HU	14	19	36	47	47
IE	5	3	2	6	6
IT	53	49	51	52	57
NL	3	3	4	4	24
PL	15	31	80	75	91
PT	8	13	13	11	23
RO	8	11	37	29	29
SE	4	7	5	6	31
Total	277	327	440	445	611

Source: Metaprofile

TVOD services by country

Country	2019	2020	2021	2022	2023
AT	14	14	13	14	15
BE	2	5	4	5	6
CZ	8	7	8	5	6
DE	15	16	17	20	21
DK	5	5	7	7	8
EE	5	3	3	4	5
ES	7	7	6	9	11
FI	5	5	8	8	9
FR	13	13	15	17	18
HU	1	4	4	5	6
IE	7	7	8	8	9
IT	8	7	6	6	7
NL	6	7	9	10	11
PL	7	6	5	8	9
PT	6	6	6	7	8
RO	1	2	1	2	3
SE	5	5	8	8	9
Total	115	119	128	143	161

Source: JustWatch

SVOD services by country

Country	2019	2020	2021	2022	2023
AT	18	12	28	39	44
BE	3	7	19	24	26
CZ	11	9	20	18	23
DE	12	23	41	56	57
DK	7	10	23	30	28
EE	4	7	17	20	20
ES	6	10	21	35	34
FI	7	10	21	28	27
FR	6	8	23	36	41
HU	0	7	17	20	21
IE	7	12	22	29	31
IT	7	11	23	36	42
NL	6	8	24	34	30
PL	9	9	19	22	24
PT	4	6	17	21	22
RO	2	5	15	18	19
SE	7	10	23	29	28
Total	116	164	373	495	517

Source: JustWatch

Main findings

A. HOW IMPORTANT ARE THEATRICAL FILMS AMONG FILMS ON OFFER ON TV AND ON VOD?

- **Television channels and even more on-demand services offer a wide range of films. However, not all of these films are theatrical films.**¹ Non-theatrical films include TV films commissioned by the TV channels; films commissioned by streamers; films released theatrically outside the EU but released directly on television or on VOD in the EU.
- **TV channels are dependent on successful theatrical films:** with a limited number of slots available to broadcast films, TV channels tend to favour theatrical films, especially those with a certain level of commercial success i.e. films that have achieved a certain level of visibility through their theatrical release.
- **Conversely, SVOD and TVOD are less focused on theatrical films:** with a much larger inventory, SVOD and TVOD services can more easily combine theatrical and non-theatrical films, including, for SVOD services, original films. SVOD and TVOD services have to some extent to also pick theatrical films which were not necessarily successful in cinemas.
- **Theatrical films are key to the offer of EU films, but not for the offer of US films:** TV channels and VOD services prefer theatrical films for their EU film offer. However, for other films, in particular US films, VOD services rely heavily on non-theatrical films. As a result, the share of EU films among theatrical films on release on VOD is much higher than for all films, theatrical or non-theatrical.
- **TV films and theatrical films are to some extent substitutable:** generally speaking, countries with a high level of production of TV fiction production (France and Germany) have an above-average share of TV films.
- **Irrespective of the exploitation window, the share of EU films is much higher when considering only recent theatrical films**²: the figures suggest that once the first exploitation of an EU film has been completed, it struggles to remain in exploitation.
- **French films account for around 50% of EU films available on TV, TVOD or SVOD.** The other main suppliers of EU films are Germany, Spain, Italy and Poland.

(1) Released in at least one European Union country.

(2) Five years or less.

B. HOW DO THEATRICAL FILMS MAKE IT TO TV AND VOD?

- **A significant share of theatrical films quickly move to another exploitation window:** 63% of films released in cinemas in 2022 were available on TV or on TVOD or on SVOD in at least one EU country already in 2022.¹ Looking at each window, TVOD and SVOD offered each about 50% of films theatrically released in 2022; the share was lower for TV (41%), but significantly higher when looking at films produced five years ago.
- **The much larger inventory of VOD services leads to a degree of exclusivity between TV and VOD**, simply because most of the films are released only on VOD.
- **These films available on TV and/or on TVOD and/or on SVOD slightly outperformed in cinemas**, as they represent 63% of the releases but about 70% of the cinema admissions in 2022.
- **However, the share of films released in 2022 in cinemas and available on TV and/or on VOD in 2022 was significantly lower for EU films than for US films**, probably reflecting the fact that a) EU films outnumber US films in cinemas (and therefore a higher share of US films are picked up by TV channels and/or VOD services) and b) a higher share of EU films never make it to TV or to VOD.
- **TV and SVOD: alternative routes after TVOD?** After their cinema release, films primarily go to TVOD (within less than one year); data suggest that theatrical films are then distributed either on SVOD or on TV.
- **VOD (and especially SVOD) enhances the circulation² of EU theatrical films when compared to TV.** The large catalogues of the main pan-European SVOD services help to ensure that the same EU films are available to some extent in a large number of countries. However, EU films remain available in fewer countries than US films, probably due to a number of factors: even pan-European services need to localise their offer; rights may not be available for all European countries. TVOD follows broadly the same pattern, although with slightly more variation between national offers.
- **Conversely, TV channels localise more their EU film offers**, and therefore EU films are less widely available on TV in Europe.

(1) Some of the films were still in theatrical release in 2022 and therefore not yet available for TV or VOD exploitation.

(2) Circulation: number of countries where a film has been made available during a given time period.

C. TO WHAT EXTENT DO CONSUMERS IN EACH COUNTRY ACCESS THEATRICAL FILMS ON TV AND ON VOD?

- **Films released in a country are widely available on TV and VOD in the same country:** consumers access on TV and/or on VOD¹ a large proportion (79%, representing 90% of the national box office) of films theatrically released in their country.
- **In addition, VOD (mostly) brings to each country a very significant number of films theatrically released in the EU but not in that country:** on average, VOD almost doubles the number of theatrical films made available in each EU country.

(1) Within five years of the theatrical release.

PART A

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THE SERVICE ANGLE: FILM OFFERING ON TV, SVOD AND TVOD

A.1. The weight of theatrical films on TV, TVOD and SVOD

- **Methodology – data setting**
 - Films with a **production date from 1996 to 2022** included.
 - **All films broadcast on TV in 2022** in the EU17.
 - **All films available in TVOD and SVOD catalogues in 2023** in the EU17.

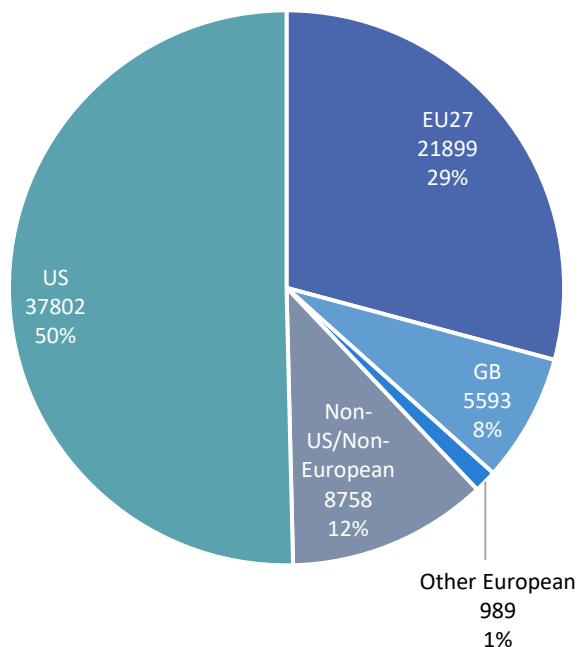
 - **A film is counted once for each distribution window (TV, TVOD and SVOD) and for each country.**
 - A film can be present three times in the same country (on TV, TVOD and SVOD).
 - Several broadcasts of a film in the same country are counted once.
 - A film's multiple presence during the year is counted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

 - Theatrical release data of films in the EU27 from 1996 to 2022 was retrieved through LUMIERE.
 - No limit on film admissions.

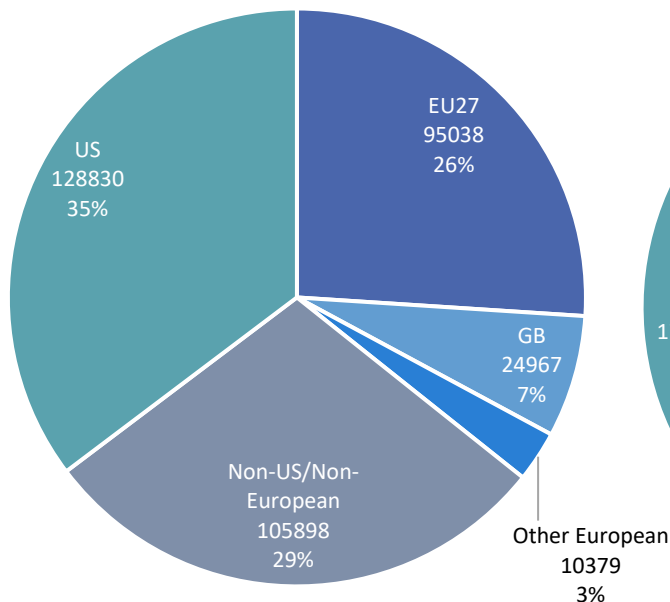
A much larger film offering on VOD than on TV; greater diversity by region of origin on SVOD

- As TV channel broadcast capacities are constrained by time slots, a much larger number of films was found in SVOD and TVOD catalogues than on TV channels – approximatively 4.5 more on TVOD and 5 times more on SVOD in the 17 EU countries.
- The highest share of EU27 films was found on TV, with 29%, followed by SVOD catalogues with 26% and TVOD with 21%.
- TV channels and TVOD catalogues had the highest share of US films, with one out of every two films being of US origin. For SVOD catalogues, US films accounted for a little more than one third of all films on offer.
- All three distribution windows had a comparable share of British films, between 7% and 9%, and other European films, between 1% and 3%.
- Non-US/non-European films had the largest share in SVOD catalogues with 29%, showing the growing importance of other production regions for global SVOD players, and accounted for 16% in TVOD catalogues and 12% in TV catalogues.

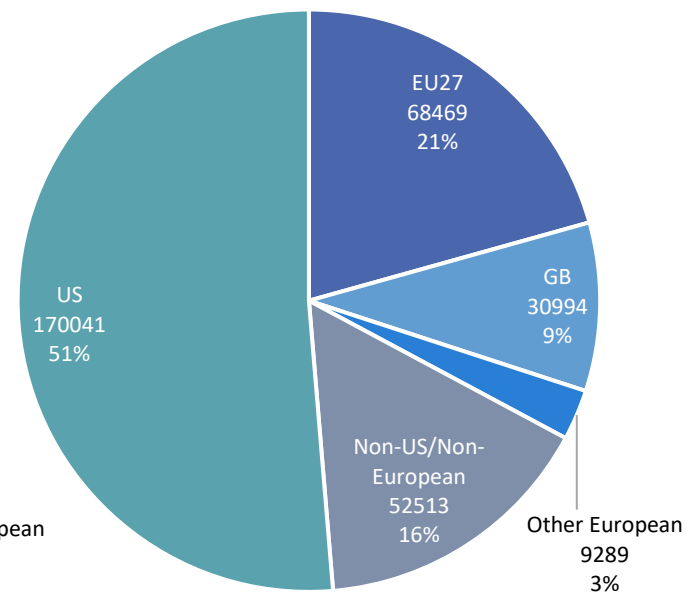
Region of origin of 75 041 films broadcast on linear TV in 2022
in EU17, in units and % of total



Region of origin of 365 112 films available on SVOD in 2023
in EU17, in units and % of total

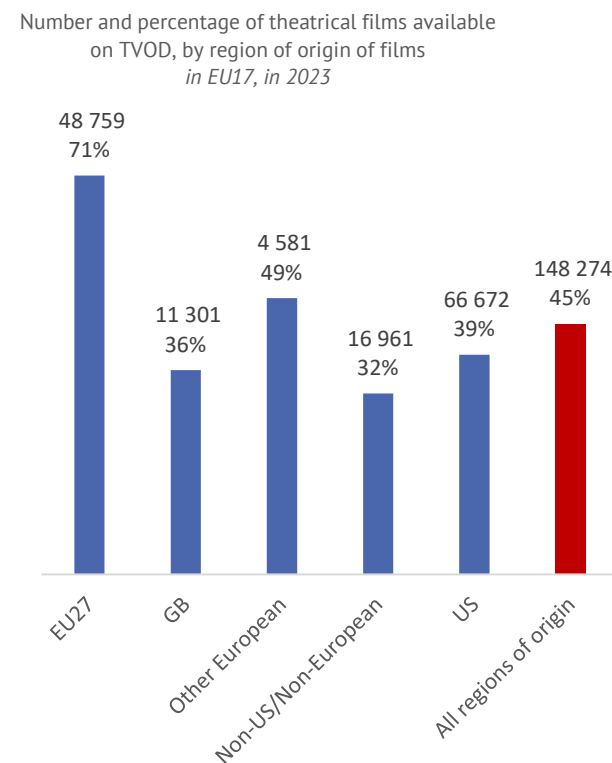
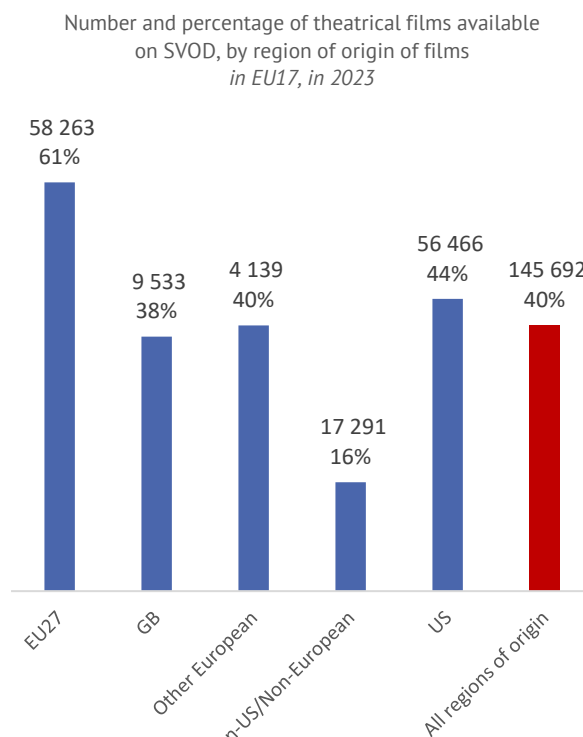
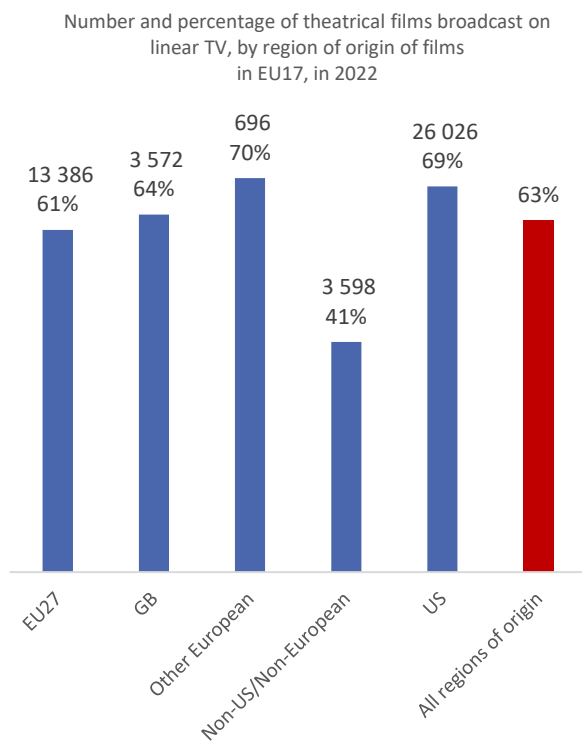


Region of origin of 331 306 films available on TVOD in 2023
in EU17, in units and % of total



A higher share of theatrically released films broadcast on TV than available in VOD catalogues

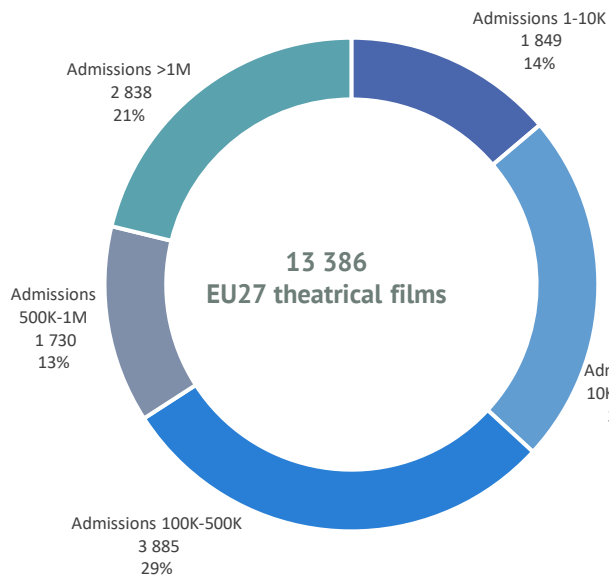
- With 63% of all films broadcast on TV in the EU17 having a theatrical release in EU27, **TV channels broadcast a higher share of theatrical films than films available on SVOD**, with 40% having a theatrical release, **and on TVOD**, with a share of theatrically released films of 45%.
 - This shows the importance of theatrically exploited films for TV channels.
- 61% of EU27 films available on SVOD and on TV were theatrically released in the EU27; for TVOD the share is 71%.**
 - For EU27 films, the high share of theatrically released films shows the importance of the cinema window for future exploitation down the value chain.
- In VOD catalogues, films from all other regions of origin were mainly direct-to-video, originals or films without an EU27 theatrical release.**
 - For non-US/non-European films on SVOD, the low share of theatrical films could indicate the increased reliance of global SVOD services on international original films or films without a cinema release in Europe.



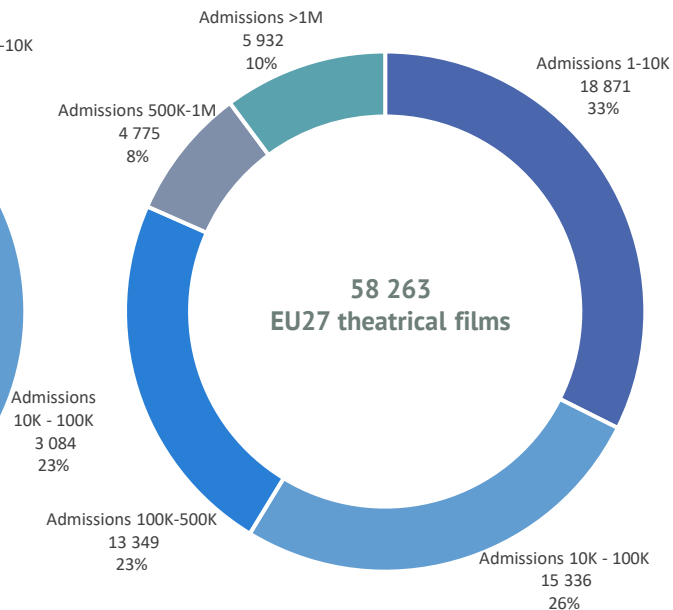
A higher share of commercial successful EU27 theatrical films broadcast on TV than available on VOD

- More than 62% of all EU27 theatrical films broadcast on linear TV received more than 100 000 admissions during their theatrical run in the EU27, while the share of EU27 theatrical films with more than 100 000 admissions was only 41% for SVOD and 49% for TVOD.
- With 33% of EU27 theatrical films having less than 10 000 admissions on SVOD and 23% on TVOD, compared with 14% on linear TV, **VOD services gave a greater share to EU27 films with a rather unsuccessful theatrical run** in their catalogues than linear TV channels, thus also giving these films a **‘second chance’ to find an audience**.
 - Also, with a much higher number of EU27 theatrical releases in absolute terms, more commercially successful EU27 films were available on VOD than on TV.
- Television broadcasters**, which need to attract an audience, relied on EU27 theatrical films, which are better known by audiences **and had a higher proportion of EU27 ‘blockbusters’ than VOD services**, with 22% of broadcast EU27 films having more than 1 million admissions, compared with 10% for SVOD and 13% for TVOD.

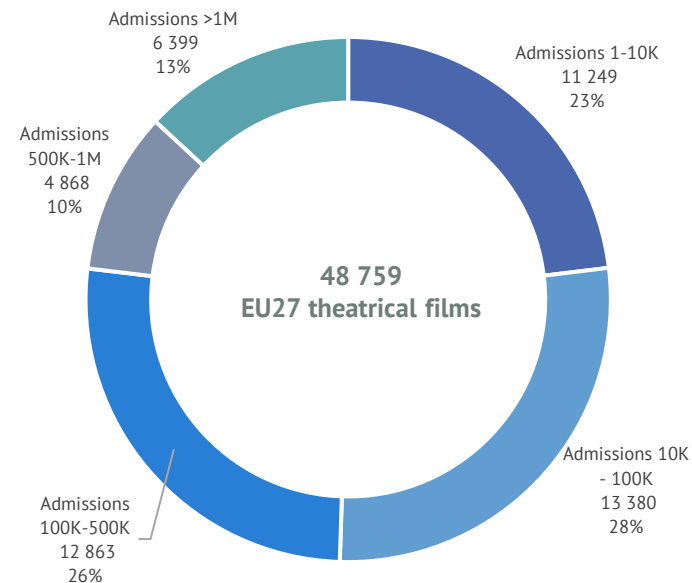
Range of admissions in EU27 cinemas of EU27 theatrical films broadcast on TV in EU17, in 2022, in % of total and absolute film presences



Range of admissions in EU27 cinemas of EU27 theatrical films available on SVOD in EU17, in 2023, in % of total and absolute film presences



Range of admissions in EU27 cinemas of EU27 theatrical films available on TVOD in EU17, in 2023, in % of total and absolute film presences



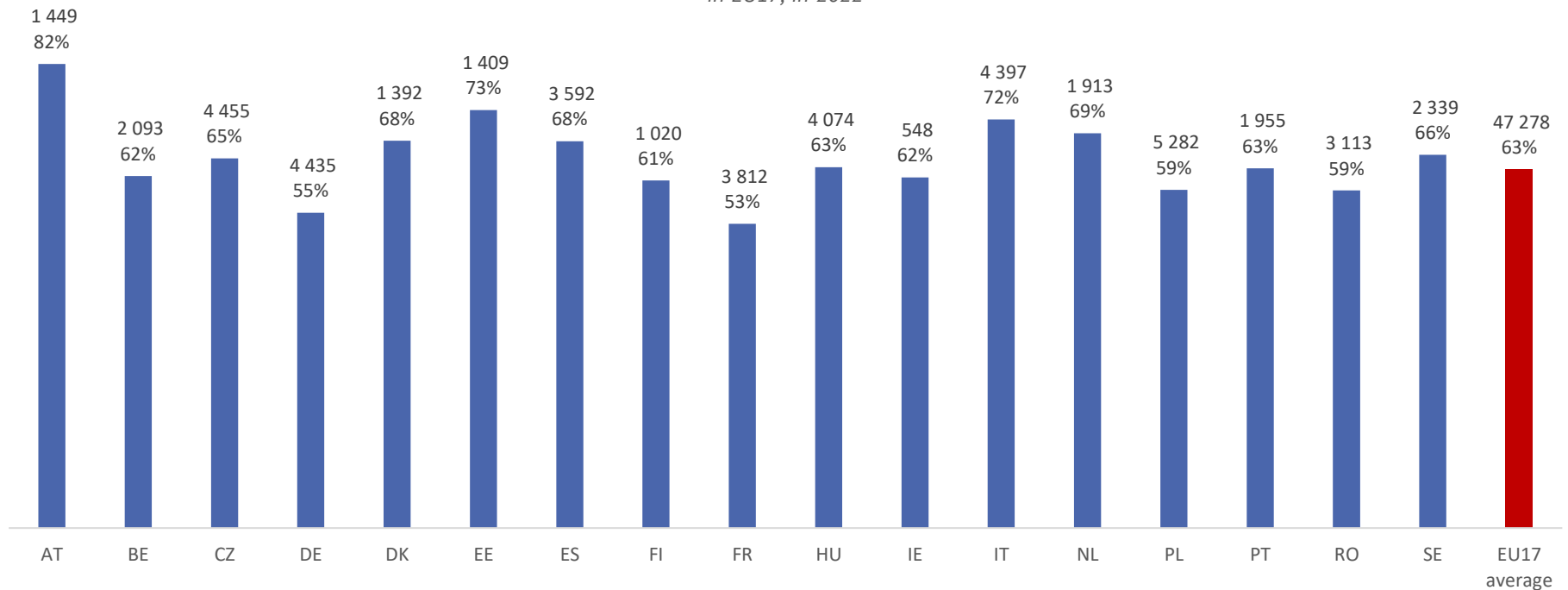
EU27 films released in EU27 cinemas and produced between 1996 and 2022. Total EU27 admissions 1996-2022

Source: European Audiovisual Observatory, LUMIERE, JustWatch, Metaprofile

A lower share of theatrically released films in countries with a high-volume TV fiction production sector

- On average in the EU17, **63% of all films broadcast on TV had a theatrical release in the EU27**, varying from 53% in France to 82% in Austria.
- TV channels in France and Germany have the lowest share of theatrically released films broadcast on TV**, with respectively 53% and 55% of all films broadcast on TV having a theatrical release.
 - These two countries are also among the main TV fiction production countries in the EU27¹, showing an increased reliance of TV channels on TV fiction films for their film offering.
- TV channels in Austria, Estonia, Italy, the Netherlands, Denmark, Spain and Sweden relied for more than two thirds of their broadcast films on theatrically released films.

Number and percentage of theatrical films broadcast on linear TV, by country of broadcast
in EU17, in 2022



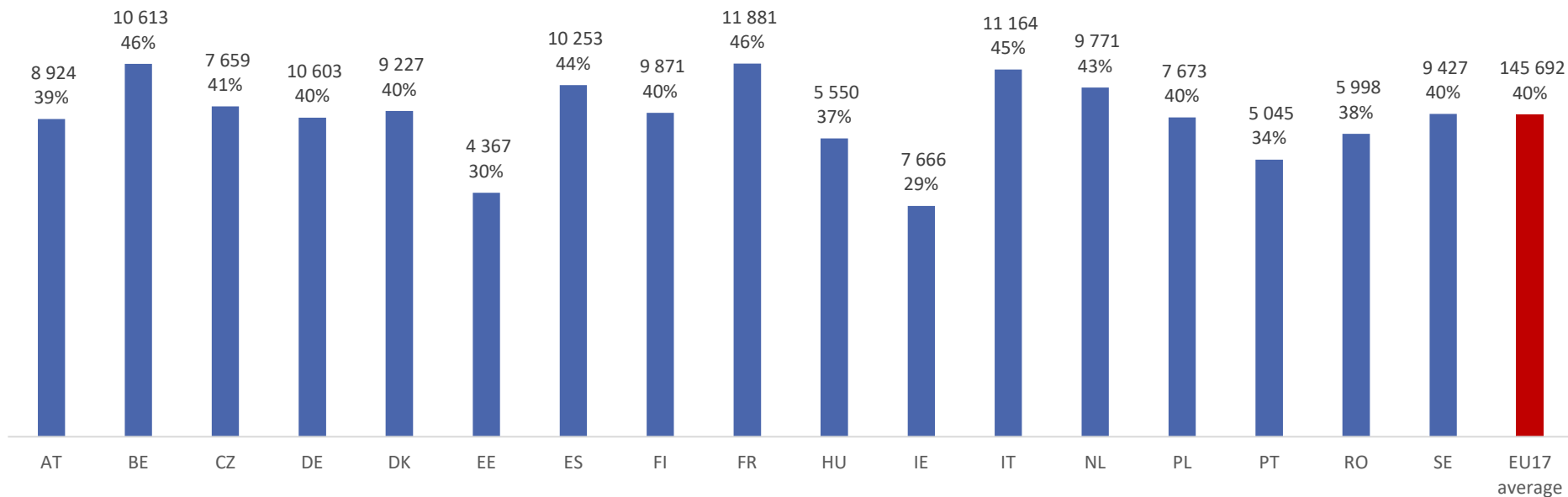
Source: European Audiovisual Observatory, LUMIERE, JustWatch, Metaprofile

¹ See "[Audiovisual fiction production in Europe – 2022 figures](#)", European Audiovisual Observatory, 2023

Less than half of all films available on SVOD had a theatrical release in the EU27

- **With 40% of all films available on SVOD in the 17 EU countries having a theatrical release in the EU27, SVOD services have the lowest share compared to TV channels and TVOD services of theatrical films.**
 - This could be evidence of the increased importance of SVOD originals (without a theatrical release in the EU27) in SVOD film catalogues in recent years and the reliance on direct-to-video and fiction films to enlarge their film offering.
- **In countries with a high-volume feature film production sector (France, Spain, Italy), the share of theatrically released films is slightly higher than in mid- and low-volume production countries.**
 - SVOD services in high-volume production countries have a larger choice of national theatrically released films to complement their film offering.

Number and percentage of theatrical films available on SVOD, by country
in EU17, in 2023

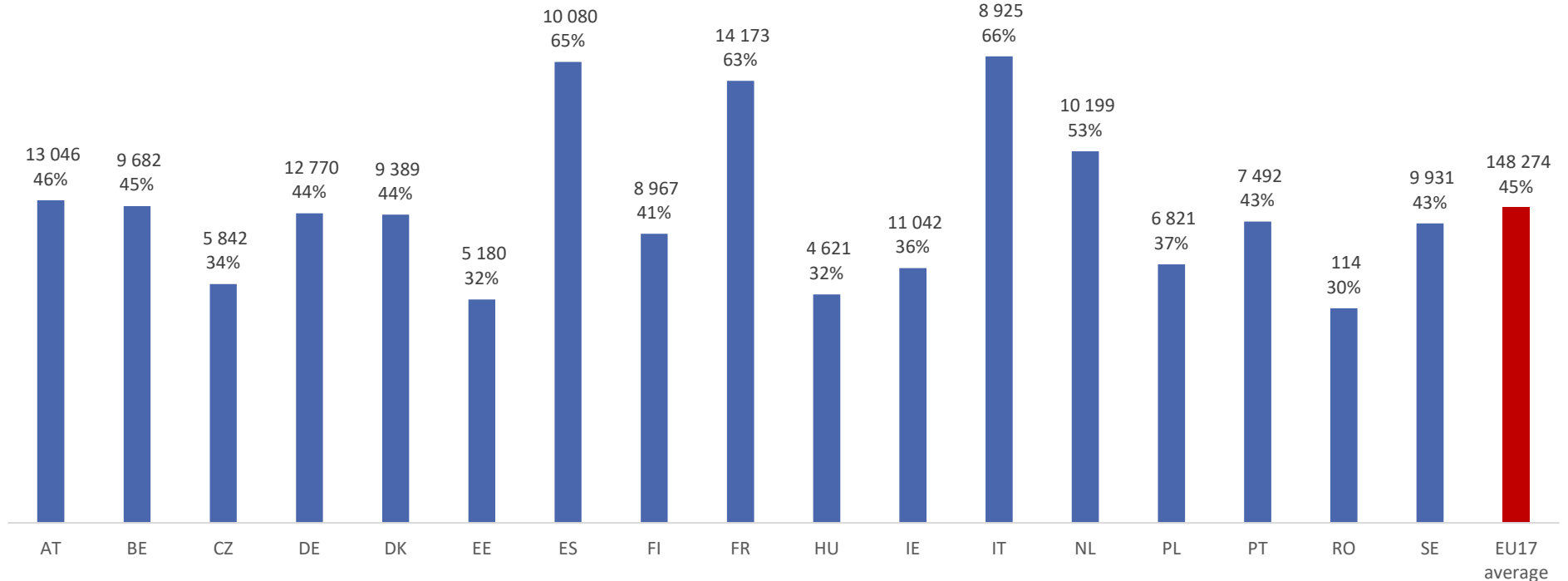


Source: European Audiovisual Observatory, LUMIERE, JustWatch, Metaprofile

A high share of theatrical films in high-volume film production countries on TVOD services

- **In France, Spain and Italy, the share of theatrically released films is much higher than the EU17 average of 45%.**
 - In countries with a vibrant film production sector, national theatrically released films are distributed on TVOD after their cinema window.
- **In the other EU17 countries, TVOD services offer a mix of films released in cinemas in the EU27 and films without a theatrical window in the EU27, direct-to-video films and TV fiction films.**
 - The lowest share of theatrically released films is found in CEE countries (Romania, Estonia, Hungary, Czechia).

Number and percentage of theatrical films available on TVOD, by country
in EU17, in 2023



Source: European Audiovisual Observatory, LUMIERE, JustWatch, Metaprofile

PART A

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THE SERVICE ANGLE: FILM OFFERING ON TV, SVOD and TVOD

A.2. Focus on recent theatrical films

- **Methodology – data setting**

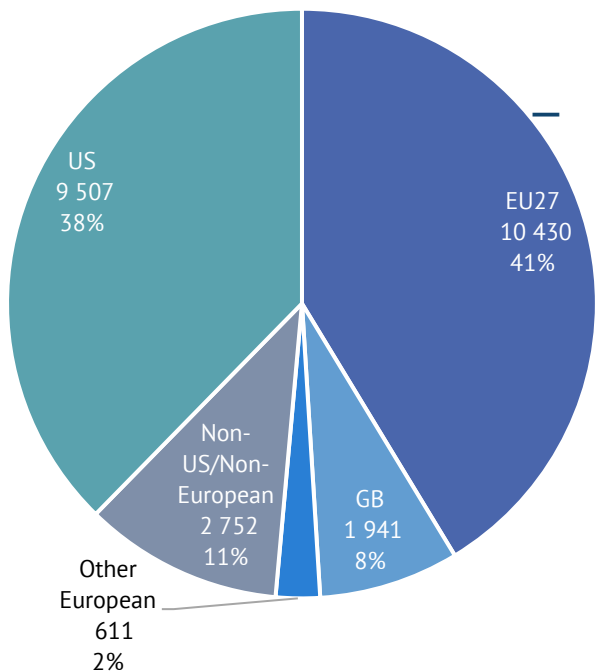
- Films with a production date from 2018 to 2022 – *LUMIERE*
- On release **in EU27 cinemas between 2019 and 2022** – *LUMIERE*
- With more than 1 000 cumulated admissions in EU27 – *LUMIERE*

- TV: broadcast on **TV in EU17 from 2019 to 2022** - *Metaprofile*
- SVOD: available in **SVOD catalogues in EU17 from 2019 to 2022** - *Justwatch*
- TVOD: available in **TVOD catalogues in EU17 from 2019 to 2022** - *Justwatch*
- For each distribution window (TV, TVOD and SVOD), for each year of availability (2019, 2020, 2021 and 2022) and for each EU17 country, **a film is counted once**

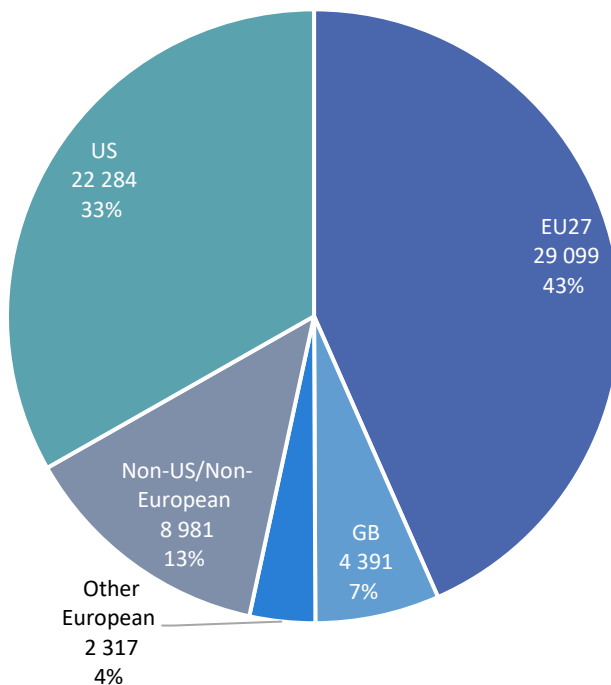
A high share of recent theatrical EU27 and European films in all 3 distribution windows

- In all windows, EU27 theatrically released films had a share between 38% on TVOD and 43% on SVOD, thus representing the region of origin with the highest amount of theatrical films.
 - European (EU27+GB+Other European) theatrical films accounted for 51% of all theatrical films broadcast on TV in the EU17, 50% of films available on TVOD and 54% on SVOD.
- US films accounted for less than 40% in all three distribution windows while non-US/non-European films had a comparable share across the three windows: between 11% and 13%.
- A comparable number of theatrical films are on offer on SVOD and TVOD services in the EU17, with over 66 000 films in both windows.

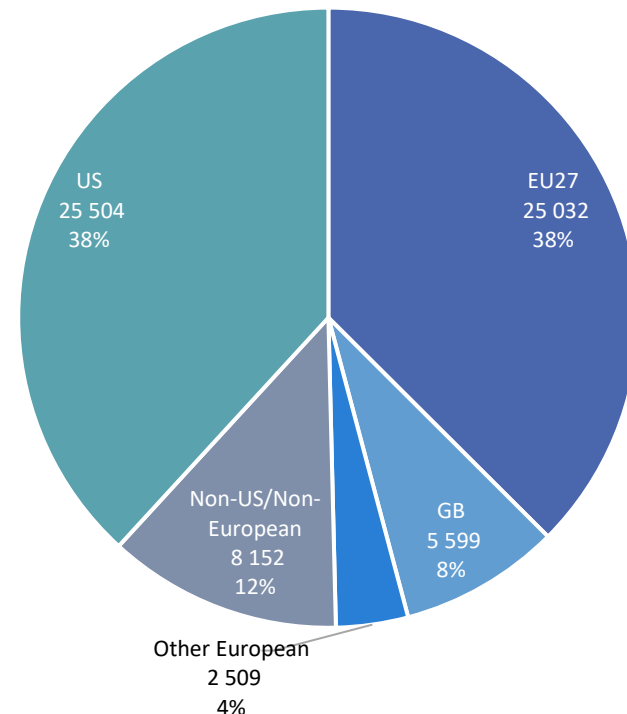
TV - Origin of 25 241 Films on release in EU 27 cinemas, with more than 1 000 admissions, broadcast 2019-2022
17 EU countries, all broadcasts



SVOD - Origin of 67 072 Films on release in EU 27 cinemas, with more than 1 000 admissions, available 2019-2022
17 EU countries, all presences



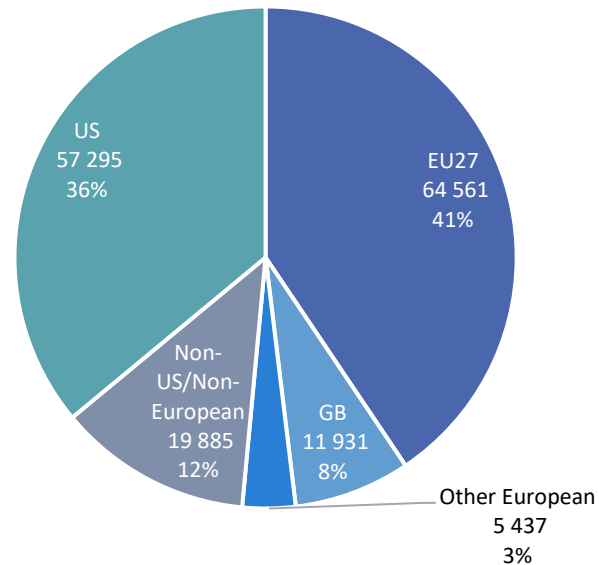
TVOD - Origin of 66 796 Films on release in EU 27 cinemas, with more than 1 000 admissions, available 2019-2022
17 EU countries, all presences



Recent European films represent the majority of theatrical films broadcast and/or available on VOD in EU17

- With 52% of all theatrical films in the EU17 broadcast and/or available on VOD of European origin, TV and VOD players rely on films with the theatrical window in the EU27.
- Films of US origin accounted for the other main part of theatrical films available in the EU17 with a share of 36%.
- Of the 159 109 theatrical films available to viewers in the 17 EU countries, films distributed on TV represented only 16%.
 - **SVOD and TVOD services account for the lion's share of theatrical films available in the EU17.**

TV + SVOD + TVOD – 159 109 films on release in EU 27 cinemas,
with more than 1 000 admissions,
available/broadcast 2019-2022
17 EU countries, all presences and all broadcasts

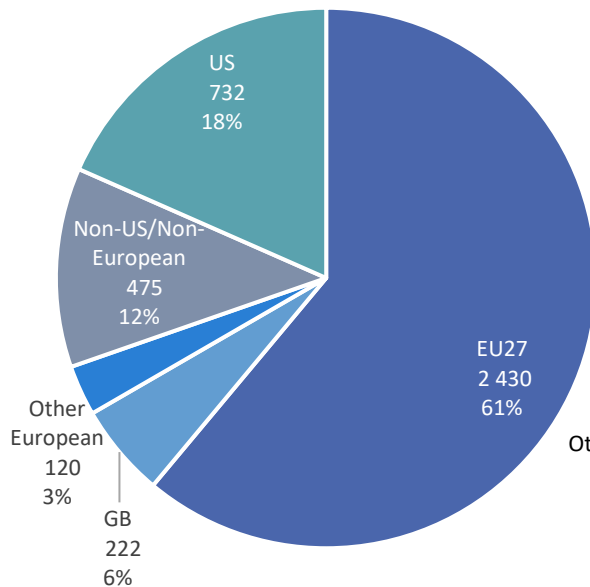


Source: European Audiovisual Observatory, LUMIERE, JustWatch, Metaprofile

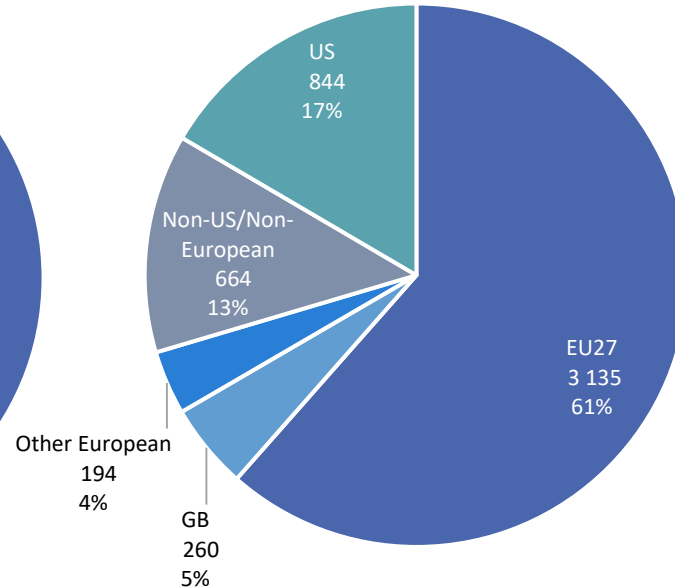
A diversified offering of recent EU27 film titles; a short selection of titles of other origins

- EU27 theatrical film titles accounted for 61% to 62% of all theatrical film titles available in the EU17 on TV and VOD**, showing a diversity in the offering across the 17 countries.
 - In the four-year period, a much larger number of EU27 films were theatrically released in the EU27 than films of other origin, thus also increasing the amount of EU27 theatrically released films available to TV channels and VOD services.
- Film titles of other origins had comparable shares (and also numbers on VOD) between the three distribution windows.
 - The offering of theatrical films rests on a large selection of EU27 film titles, often available in a smaller number of EU17 countries**, and a reduced number of theatrical film titles of other origins, with a wider circulation among EU17 countries.

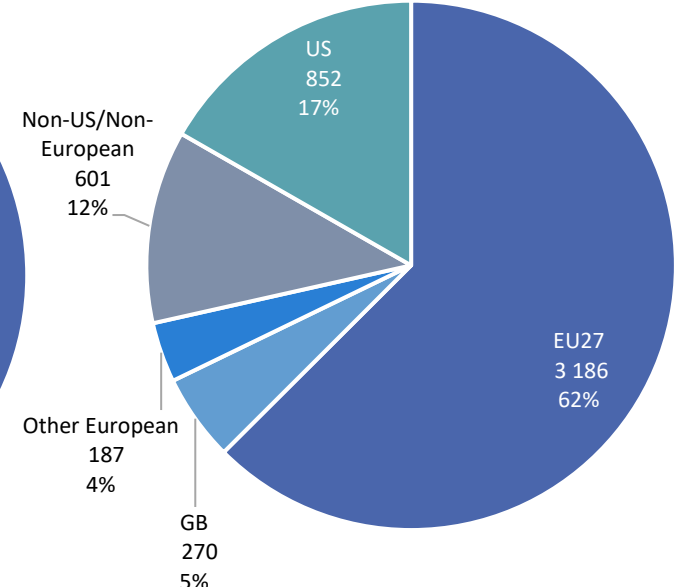
TV - Origin of 3 979 film titles on release in EU 27 cinemas, with more than 1 000 admissions, available 2019-2022
17 EU countries, unique titles broadcast



SVOD - Origin of 5 097 film titles on release in EU 27 cinemas, with more than 1 000 admissions, available 2019-2022
17 EU countries, unique titles available



TVOD - Origin of 5 096 film titles on release in EU 27 cinemas, with more than 1 000 admissions, available 2019-2022
17 EU countries, unique titles available



PART A

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THE SERVICE ANGLE: FILM OFFERING ON TV, SVOD and TVOD

A.3. Breaking down EU films by country of origin

- **Methodology – data setting**

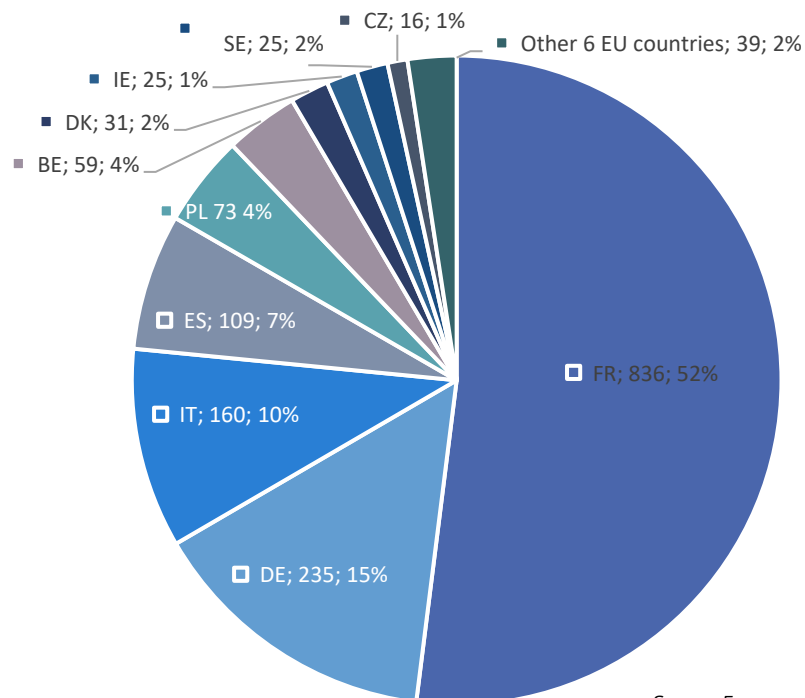
- Films with a production date in 2018 and 2019 - *LUMIERE*
- **On release in EU27 cinemas in 2019** - *LUMIERE*
- With more than 1 000 cumulated admissions in EU27 – *LUMIERE*
- ➔ 1 645 EU27 theatrical film titles of all origins released in EU27 cinemas in 2019 with more than 1 000 admissions

- TV: **broadcast on TV in EU17 from 2019 to 2022** - *Metaprofile*
- SVOD: **available in SVOD catalogues in EU17 from 2019 to 2022** - *Justwatch*
- TVOD: **available in TVOD catalogues in EU17 from 2019 to 2022** - *Justwatch*
 - **For each year of availability** (2019, 2020, 2021 and 2022), each distribution window and for each EU17 country, a film is counted once

Films produced in EU4 accounted for more than 84% of all EU27 theatrical films available on TV

- Most films theatrically released in 2019 and broadcast on TV channels in the EU17 from 2019 to 2022 were of French origin (52% of all available films), followed by German films (15%), Italian films (10%) and Spanish films (7%).
 - The top 10 EU27 production countries represented 98% of all broadcast EU27 theatrical films.
- Whereas films from mid-volume film production countries such as Poland, Belgium, Denmark or Ireland were broadcast on TV channels in the EU17, albeit at a lower rate than EU4 films, films from lower-production countries were either not broadcast, or broadcast at a much lower rate.
 - This was further accentuated by the limit of 1 000 admissions, as films from lower-volume production countries cross this bar relatively more rarely than films produced in the EU4 (with also a bigger national cinema market).

TV - Main production countries of EU27 theatrically released films cumulated - broadcast 2019-2022 in EU17, in number of films

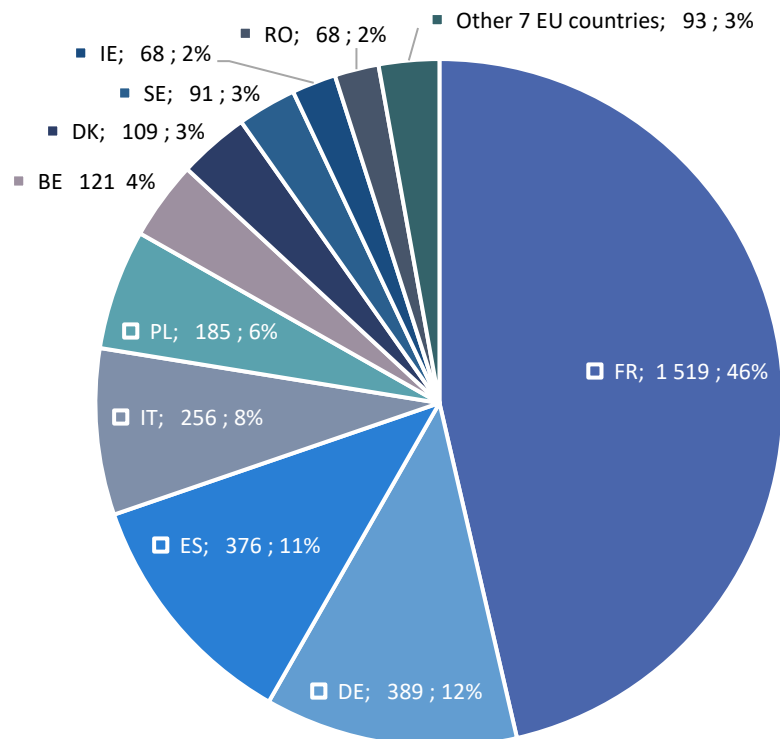


Source: European Audiovisual Observatory, LUMIERE, JustWatch, Metaprofile

Films produced in EU4 accounted for more than 77% of all EU27 theatrical films available on SVOD

- The origin of EU27 theatrical films on SVOD services was a bit less concentrated than on TV with a lower reliance on films produced in high-volume production countries, with films from the EU4 representing 77%, and a slightly higher share of films issuing from mid-volume film production countries.
- However, the top 10 EU27 production countries had a share of 97%, similar to the concentration on TV, due to the low supply of theatrical films of low-volume production countries with more than 1 000 admissions.

SVOD - Main production countries of EU27 theatrically released films cumulated - available 2019-2022 in EU17, in number of films

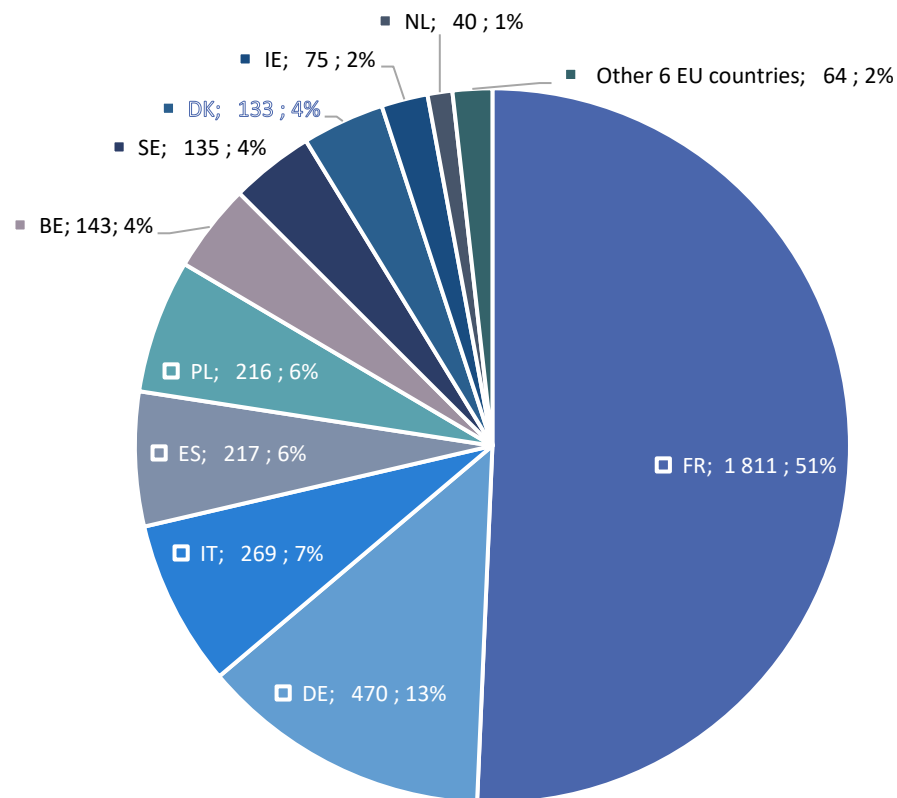


Source: European Audiovisual Observatory, LUMIERE, JustWatch, Metaprofile

Films produced in EU4 accounted for more than 77% of all EU27 theatrical films available on TVOD

- The origin of EU27 theatrical films on TVOD, comparable to SVOD, was a bit less concentrated than on TV with a less heavily reliance on films produced in high-volume production countries, with films from EU4 representing 77% and a slightly higher share of films issue from mid-volume film production countries.
 - However, the top 10 EU27 production countries had a share of 98%, similar to the concentration on TV, due to the low supply of theatrical films of low-volume production countries above 1 000 admissions.

TVOD - Main production countries of EU27 theatrical released films cumulated - available 2019-2022 in EU17, in number of films



PART B

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THE FILM ANGLE: FROM CINEMA TO TV AND VOD

B.1. How many theatrical films make it to TV and VOD?

B.1. How many theatrical films make it to TV and VOD?

- **Methodology – data setting**

- Films with a production date between 2018 and 2022 - *LUMIERE*

- **On release in EU17 cinemas in 2022** - *LUMIERE*

- With more than 1 000 cumulated admissions in EU17 - *LUMIERE*

- ➔ 2 660 theatrical film titles of all origins released in EU17 cinemas in 2022 with more than 1 000 admissions, representing 482 123 241 admissions

- TV: **broadcast on TV in EU17 in 2022** - *Metaprofile*

- SVOD: **available in SVOD catalogues in EU17 in 2022** - *Justwatch*

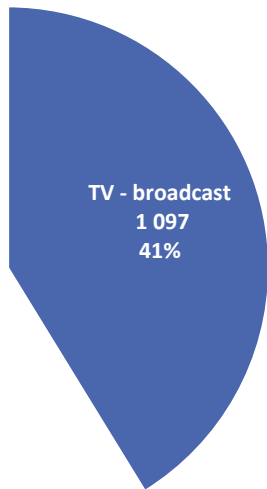
- TVOD: **available in TVOD catalogues in EU17 in 2022** - *Justwatch*

- Each country broadcast and SVOD and TVOD availability is counted once

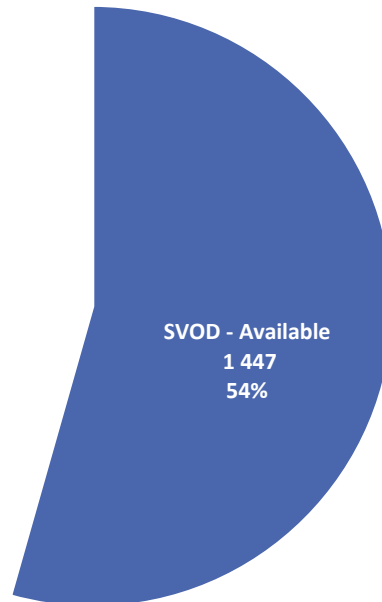
Between 41% and 55% of all theatrical films on release in cinemas in EU17 in 2022 were available on TV and VOD

- **TV channels in the EU17 broadcast 41% of all theatrical films on release in EU17 cinemas in 2022**, with 1 097 film titles out of the 2 660 theatrical films on release.
- **SVOD services made available 54% of all theatrical films on release in EU17 cinemas and TVOD services 55%.**
 - More recently produced theatrical films (2022) are less likely to be made available to EU17 viewers on TV, SVOD and TVOD whereas films produced from 2018 to 2021 and still on release in EU17 cinemas represent the lion's share of films available.
 - Distribution of films can be simultaneous in all four windows, mainly for films beyond the exclusive theatrical window.

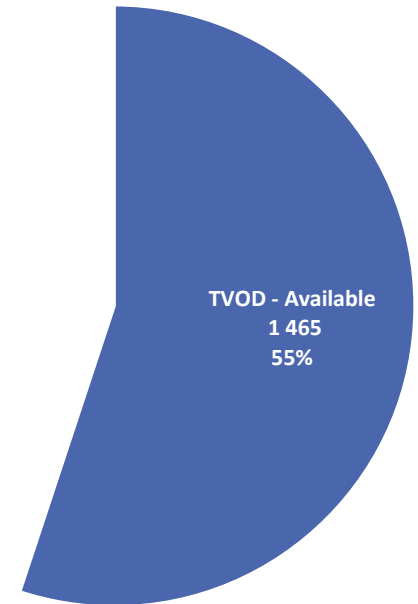
TV - Number of theatrical films on release in 2022 in EU17 and broadcast in 2022 with more than 1 000 admissions and produced 2018-2022



SVOD - Number of theatrical films on release in 2022 in EU17 and available on SVOD with more than 1 000 admissions and produced 2018-2022



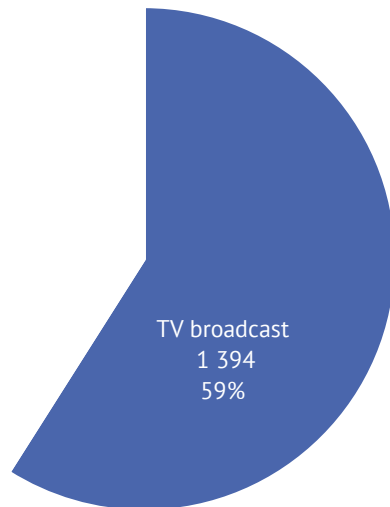
TVOD - Number of theatrical films on release in 2022 in EU17 and available on TVOD with more than 1 000 admissions and produced 2018-2022



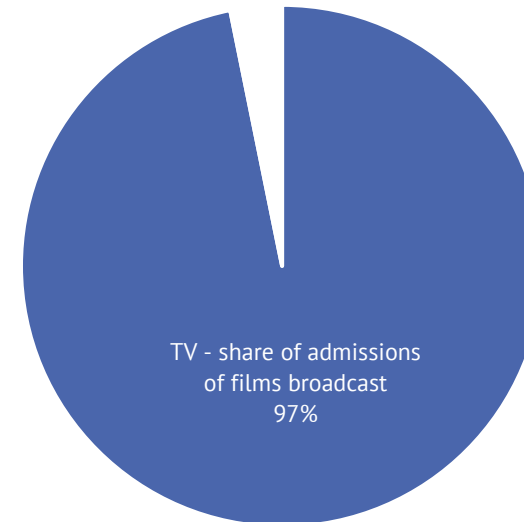
A much higher share of films available on TV five years after their theatrical release

- Films produced 2018 and 2019 on release in EU17 cinemas in 2019 and broadcast on linear TV in 2022, with at least 1 000 admissions.
- Unsurprisingly, the share of theatrical films available on TV in 2019 is much higher than for theatrical films in 2022.
- TV broadcasts the most successful theatrical titles, with more than 97% of all 2019 admissions covered by 2022 TV broadcasts.

TV - Number of theatrical films on release in 2019 in EU17 and broadcast in 2022 with more than 1 000 admissions and produced 2018-2019



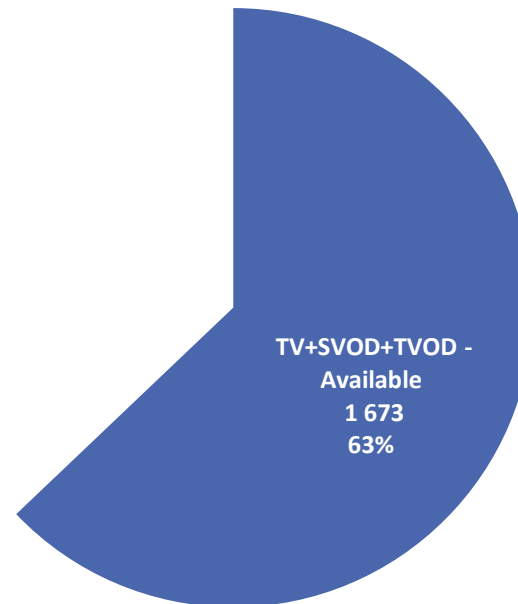
TV - Share of theatrical admissions in 2019 in EU17 of films broadcast in 2022 with more than 1 000 admissions and produced 2018-2019



In EU17, 63% of all films on release in cinemas in 2022 were broadcast and/or available on VOD

- **In total, 1 673 films out of the 2 660 on release in 2022 in EU17 cinemas** with a production date between 2018 and 2022 and at least 1 000 admissions **were made available, through subscriptions** (pay TV and SVOD), **transactions** (TVOD) **or for free** (public and commercial TV) to EU17 viewers.
 - This tends to show that after their theatrical run, **the majority of films on release in cinemas are distributed through other windows.**
 - **Furthermore, the four windows coexist:** they differ from one EU17 country to another with different licensing and windowing regimes; thus, a film may be released in cinemas in one country and available in another window in another country.

TV+SVOD+TVOD - Number of theatrical films on release in EU17 cinema in 2022
with more than 1 000 admissions and produced 2018-2022



58% of all EU27 films on release in cinemas in 2022 were available on TV and VOD

- Taking into account the region of origin of the films, 58% of the 1 848 EU27 theatrical films released in the EU17 were available on VOD and/or broadcast on TV.
- Around 76% of UK and 62% of other European theatrical releases were also available on VOD and TV.
- The proportion was even higher for US films, with 81% of theatrical releases available, and for non-US/non-European films, with 67%.

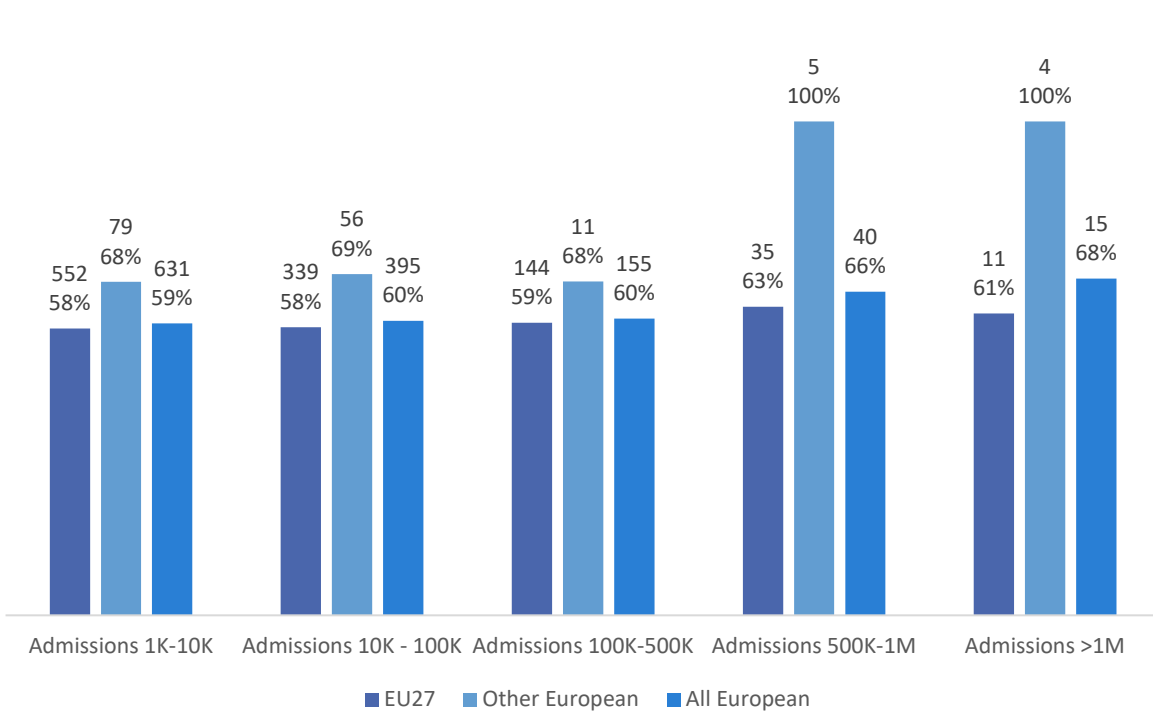
TV+SVOD+TVOD – Share and number of theatrical films on release in EU17 cinema 2022
with more than 1 000 admissions and produced 2018-2022 available on TV or VOD
by region of origin



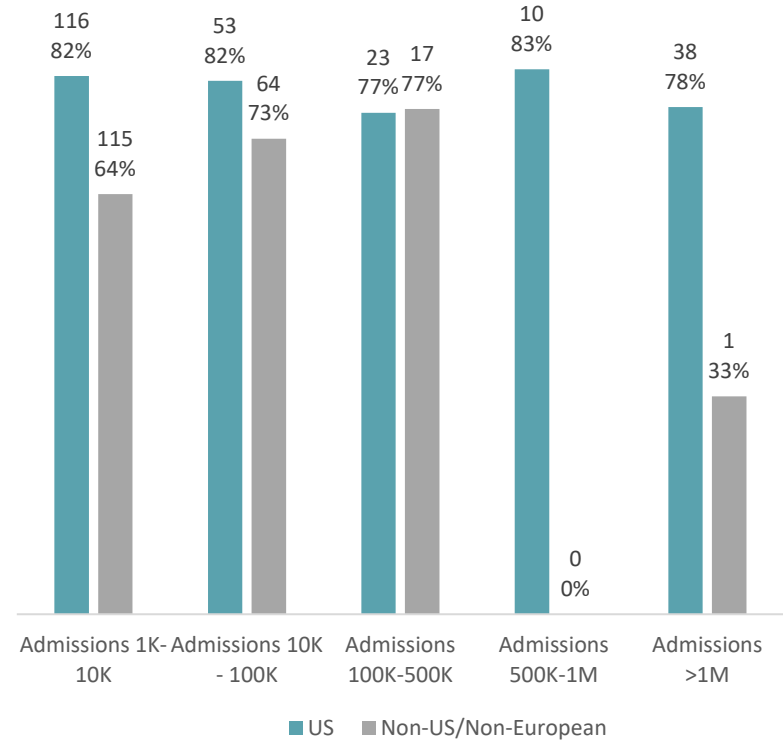
For European films, theatrical success slightly increases TV and VOD availability

- While 'only' 59% of European theatrical films with admissions between 1 000 and 10 000 were available on TV/VOD, 66% of European films with admissions between 500 000 and 1 million and 68% of European films with admissions over 1 million were available on TV/VOD.
- For US films, the proportion of films available in cinemas ranged from 77% to 83% depending on the admissions bracket, with no significant difference in the proportion of films available according to cinema admissions.
- For non-US/non-European films, theatrical films with more than 500 000 admissions were less available on TV and VOD, whereas films with less than 500 000 admissions seemed to be more available on TV and VOD.

Share and number of theatrical European films on release in 2022 in cinemas available on TV and VOD in 2022 by admissions brackets, in % of total and absolute numbers



Share and number of theatrical non-European films on release in 2022 in cinemas available on TV and VOD in 2022 by admissions brackets, in % of total and absolute numbers

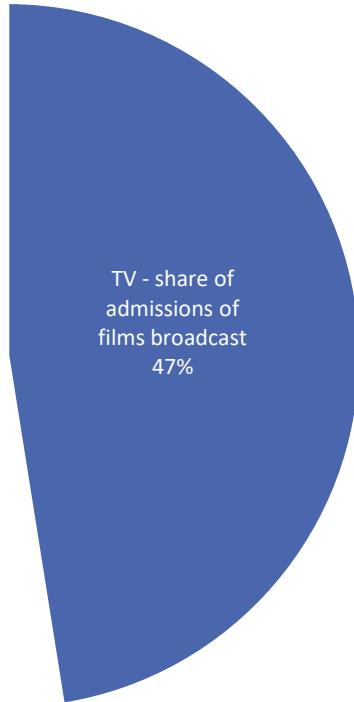


Source: European Audiovisual Observatory, LUMIERE, JustWatch, Metaprofile

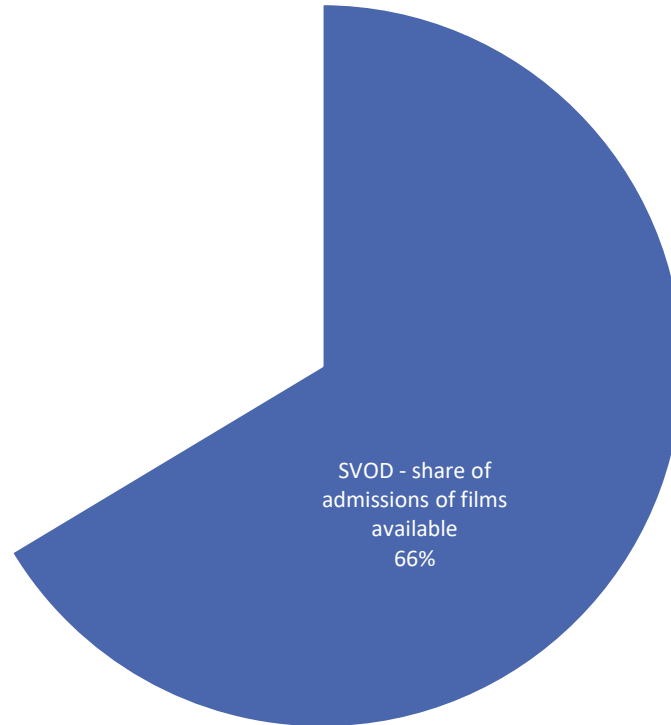
Films made available on TV and VOD in 2022 represented between 47% and 68% of all 2022 admissions in EU17

- The **share of admissions to films on release in cinemas in 2022 (total admissions in EU17 of 482.1 million) available for all three windows was higher than the share of films available in 2022 in the EU17.**
 - This shows **that TV and VOD players select the more commercially successful theatrical films** to be broadcast or made available in their catalogues.

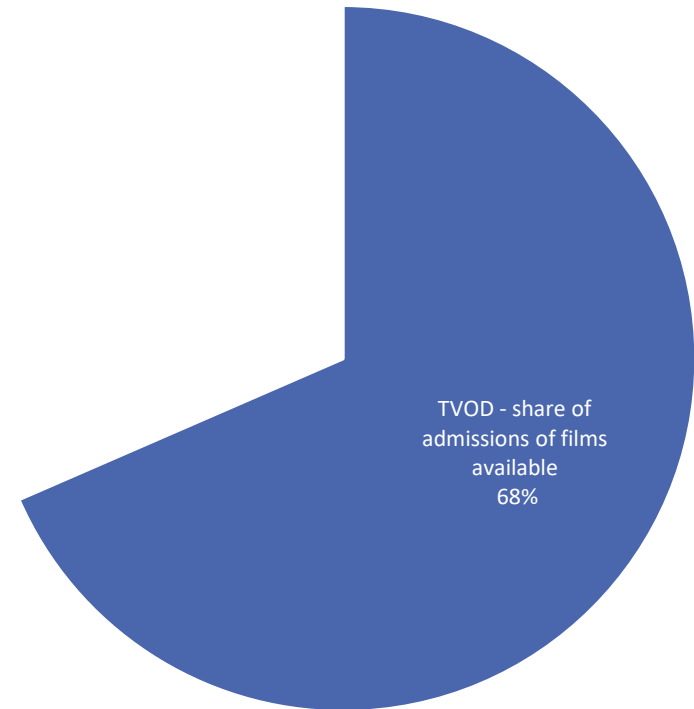
TV - Share of theatrical admissions 2022 of films broadcast in 2022



SVOD - Share of theatrical admissions 2022 of films available in 2022



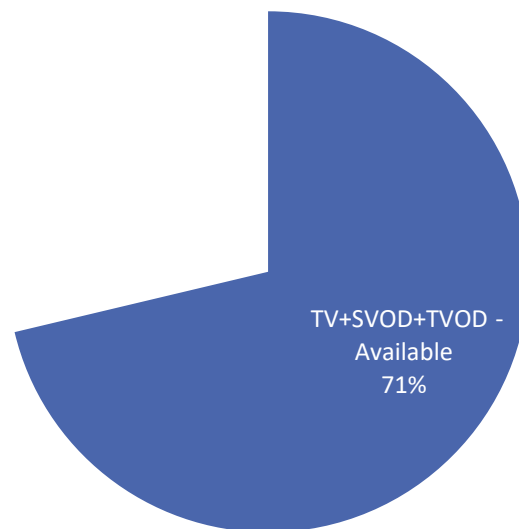
TVOD - Share of theatrical admissions 2022 of films available in 2022



In all three windows, the share of admissions to films on release in EU17 cinemas in 2022 represented 71%

- **Representing 71% of all admissions to films on release in EU17 cinemas in 2022, the combined three windows tended to make available to their viewers the most commercially successful theatrical films.**
 - The missing share of admissions to films on release in 2022 in the EU17 comprises mainly blockbusters and high-budget films released in cinemas in 2022, thus still in an exclusive cinema window for films released in the second part of 2022 and smaller films which did not benefit from an additional distribution window.

TV+SVOD+TVOD - Share of theatrical admissions of films available in 2022



PART B

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THE FILM ANGLE: FROM CINEMA TO TV AND VOD

B.2. The cinema, TV and VOD life cycle

- **Methodology – data setting**

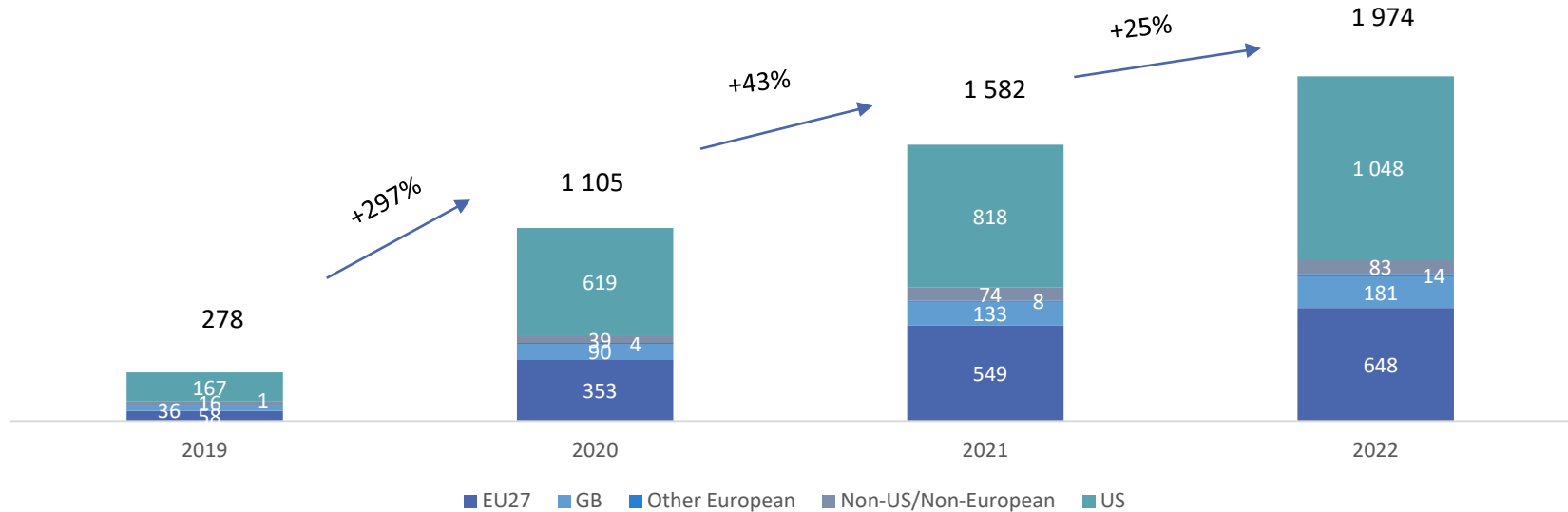
- Films with a production date in 2018 and 2019 - *LUMIERE*
- **On release in EU27 cinemas in 2019** - *LUMIERE*
- With more than 1 000 cumulated admissions in EU27 – *LUMIERE*
- ➔ 2 520 theatrical film titles of all origins released in EU27 cinemas in 2019 with more than 1 000 admissions

- **TV: broadcast on TV in EU17 from 2019 to 2022** - *Metaprofile*
- **SVOD: available in SVOD catalogues in EU17 from 2019 to 2022** - *Justwatch*
- **TVOD: available in TVOD catalogues in EU17 from 2019 to 2022** - *Justwatch*
 - For each year of availability (2019, 2020, 2021 and 2022), each distribution window and for each EU17 country, a film is counted once.

A low number of theatrical films broadcast the first year of release, steadily increasing in the following years

- With only 278 broadcasts of 2019 theatrically released films in 2019, TV channels offered the lowest number of theatrical films in the EU17 compared to VOD.
- Following the year of theatrical release, the number of broadcasts increases radically as new film titles enter the pay TV, then the commercial and free TV distribution windows: a jump of 297% in 2020, followed by an increase of 43% in 2021 and 25% in 2022.
 - EU27 films experienced the highest increase in their broadcast following the year of theatrical release, from only 58 broadcasts in 2019 to 353 in 2020.
- The distribution of theatrical films on EU17 TV channels is more incremental in the following three years than on VOD, especially on TVOD.

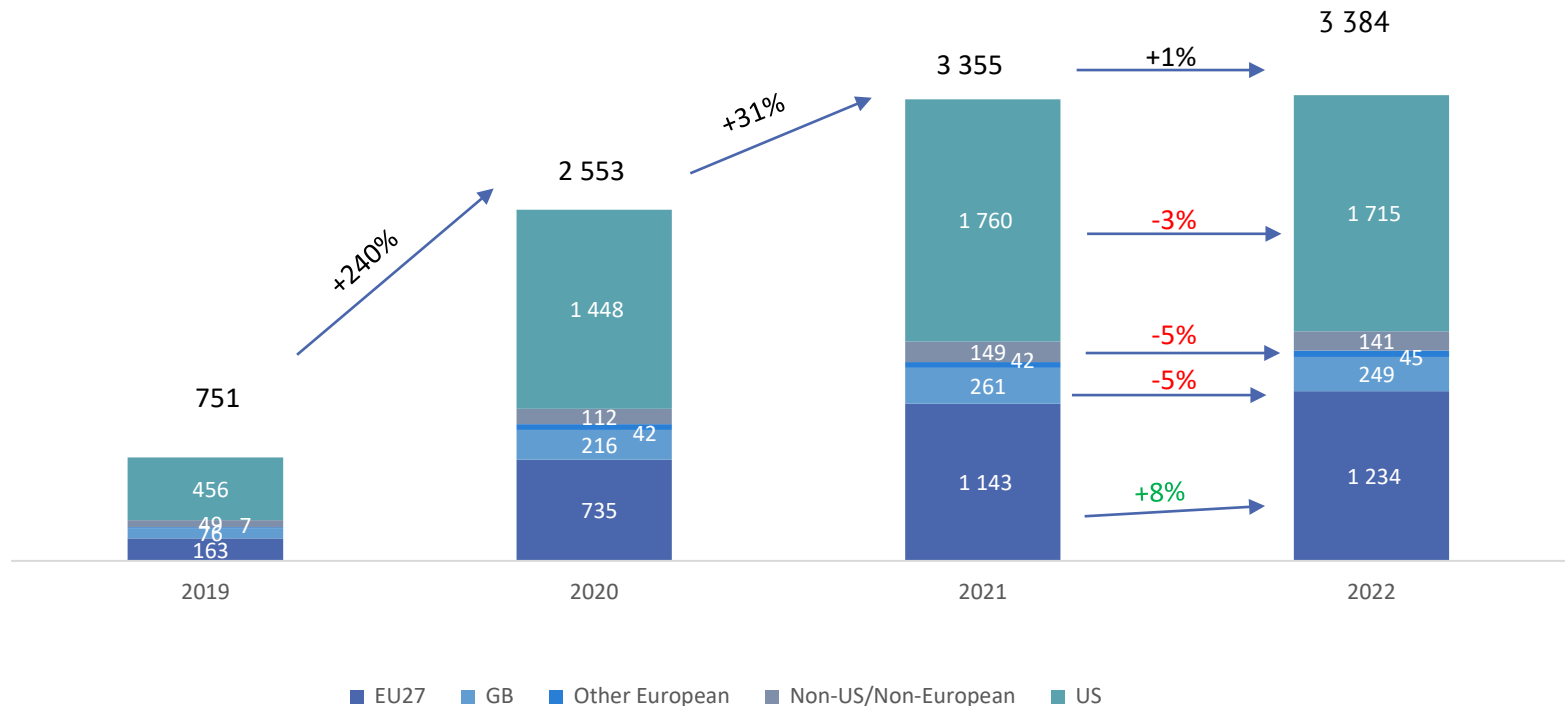
TV - Theatrically released films in EU27 in 2019 and broadcast on TV in EU17 2019-2022 in numbers of broadcasts



On SVOD, fast increase in theatrical films available after theatrical release, with a decrease in year 4 for films of non-EU27 origin

- While several theatrical films released in 2019 in the EU27 were already available on SVOD services the same year, it was during the two years after their theatrical release that films found their way into SVOD catalogues.
 - This is especially true for films of non-EU27 origin: three years after their theatrical release, the number of films of all other origins decreased.
 - This could also be due to the limited time, due to licensing, during which these titles are present in SVOD catalogues. Films with lesser appeal to SVOD subscribers might not see their license renewed.

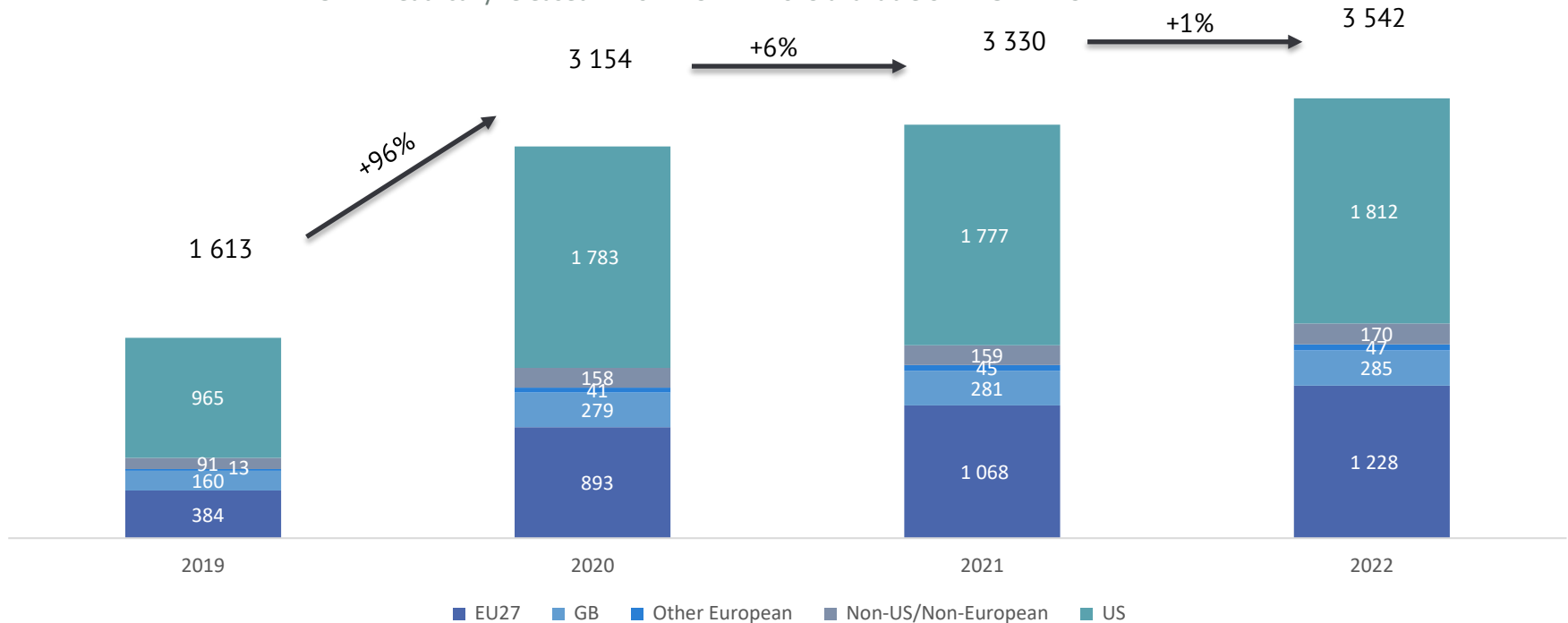
SVOD – Theatrically released films in EU27 in 2019 and available on SVOD in EU17



Theatrically released films are rapidly distributed in TVOD catalogues in the two years after their initial release

- In the year of their theatrical release, 1 613 films were available on TVOD in EU17 with 60% of US origin, and the year after the number almost doubled, showing that **theatrical films are rapidly released on TVOD services for further distribution.**
- **After the second year** of their theatrical release, **most films with a commercial future on TVOD are already present and distributed.**
 - In 2020, 90% of the films available in 2019 were already present in TVOD catalogues. The share is the highest for US and GB films with 98% of films available in 2022 present already in 2020. This is the case for only 73% of EU27 films.
- TVOD services follow cinema in the distribution of films, especially for US and GB theatrical films, which build on the awareness (promotion/marketing) generated during the theatrical run.

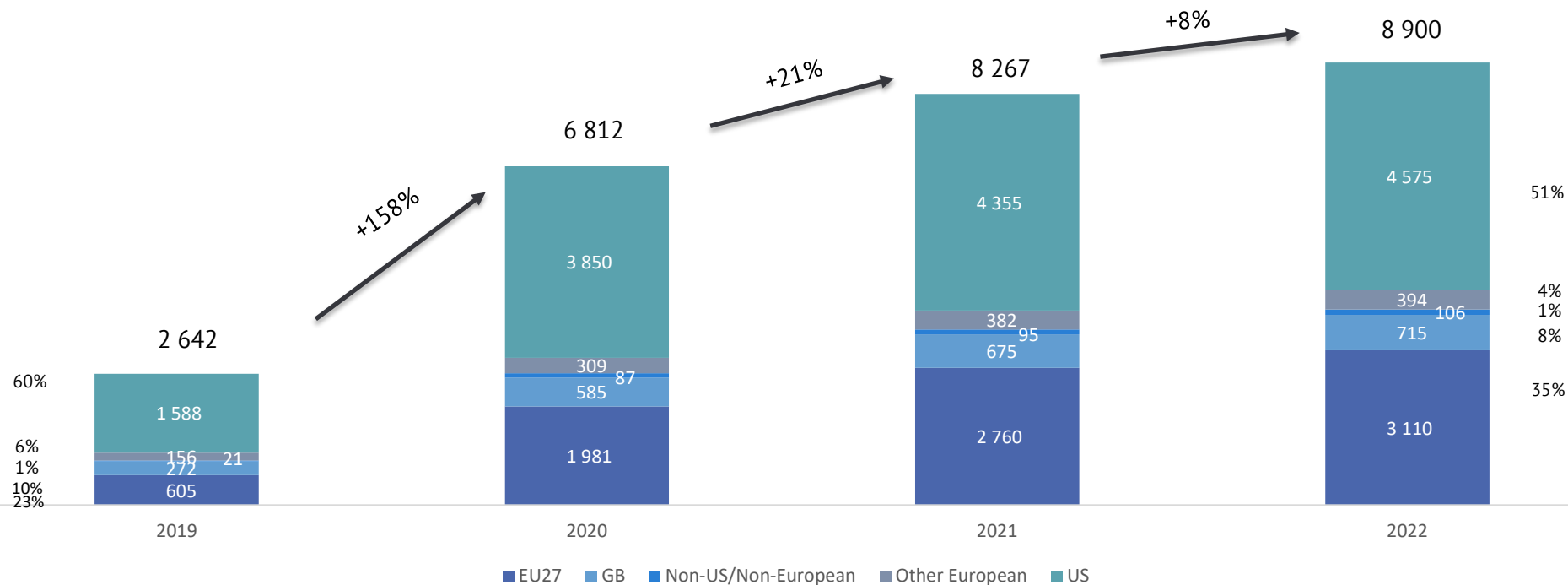
TVOD - Theatrically released films in EU27 in 2019 available on TVOD in EU17



A high number of theatrical films available to EU17 viewers the year after their theatrical release on TV/SVOD/TVOD

- In the year of their theatrical release, 60% of films available on TV and/or VOD were of US origin with 23% of films of EU27 origin. At the end of the four-year period, EU27 theatrical films available accounted for 35% while the share of US films decreased to 51%.
 - This tends to show that whereas US films transition rapidly for distribution to other windows and are made available to viewers, EU27 films have a longer path to reach viewers, whether on TV or VOD.

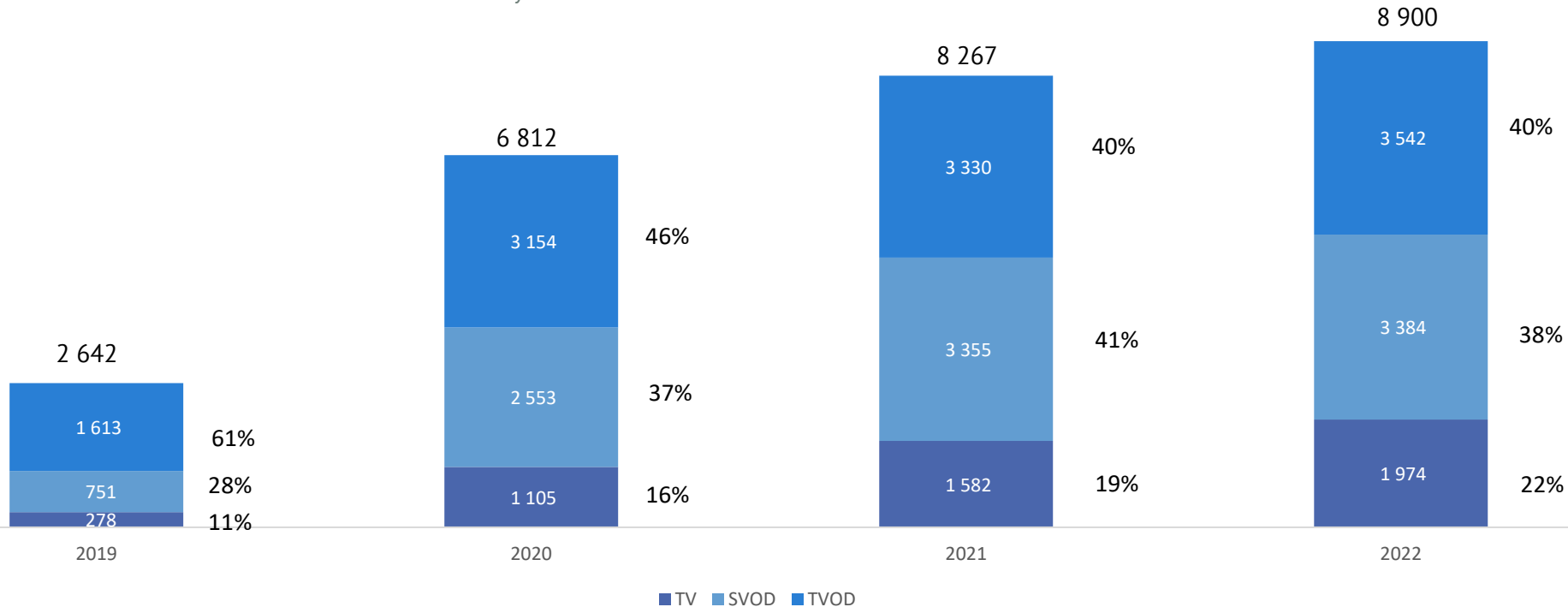
TV+SVOD+TVOD - Theatrically released films in EU27 in 2019 available in EU17



TVOD services represented the main share of theatrically released films available two year after their release

- With 61% of all theatrical films available the year they were on release on TVOD, TVOD services accounted for the lion's share of theatrical films available to EU17 viewers in 2019.
- While only representing 11% of all 2019 theatrical films on offer in 2019, TV channels increased their share of theatrical films to 22% in 2022.
- With 28% of all 2019 theatrical films in 2019 but already 41% of all available 2019 theatrical films in 2021, SVOD services complement the distribution of films after their theatrical and transactional window.
 - In the first two years after their theatrical exploitation, films are mainly exploited on a transactional or subscription (SVOD and pay-TV) basis, free (commercial and public TV) distribution complements the TVOD window after the initial release.

TV+SVOD+TVOD - Theatrically released films in EU27 in 2019 available on TVOD in EU17



Theatrical films are rapidly available on TVOD after their cinema release and then progressively on SVOD and TV

- Looking at average availability at the end of the year of films' cinema release, **TVOD appears to be the primary distribution window for theatrical films in the EU17.**
- However, it seems that **theatrical films are then distributed either on SVOD or on TV as no significant overlap for theatrical films with an average year of release of 2019 is found between SVOD services and TV channels.**
- **Theatrical films benefit on average from a wider country circulation on SVOD, with 2019 theatrical films available on average in 7.6 EU17 countries,** followed by TVOD with 6.3 EU17 countries and TV with 4.4 countries.
 - **Distribution following the theatrical release and TVOD availability of films in EU17 may not always follow the classical path of cinema – TVOD – pay TV – SVOD – free TV but rather films are made available on SVOD, TV or both according to licensing deals, potential commercial success, audience behaviour in the country and other factors.**

2019 theatrical film releases on VOD and TV	Average number of release countries	Average year of release
TVOD	6.3	2019.9
SVOD	7.6	2020.4
TV	4.4	2020.6

Source: European Audiovisual Observatory, LUMIERE, JustWatch, Metaprofile

PART B

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THE FILM ANGLE: FROM CINEMA TO TV AND VOD

B.3. To what extent are the same films made available throughout the EU?

B.3. To what extent are the same films made available throughout the EU?

- **Methodology – data setting**

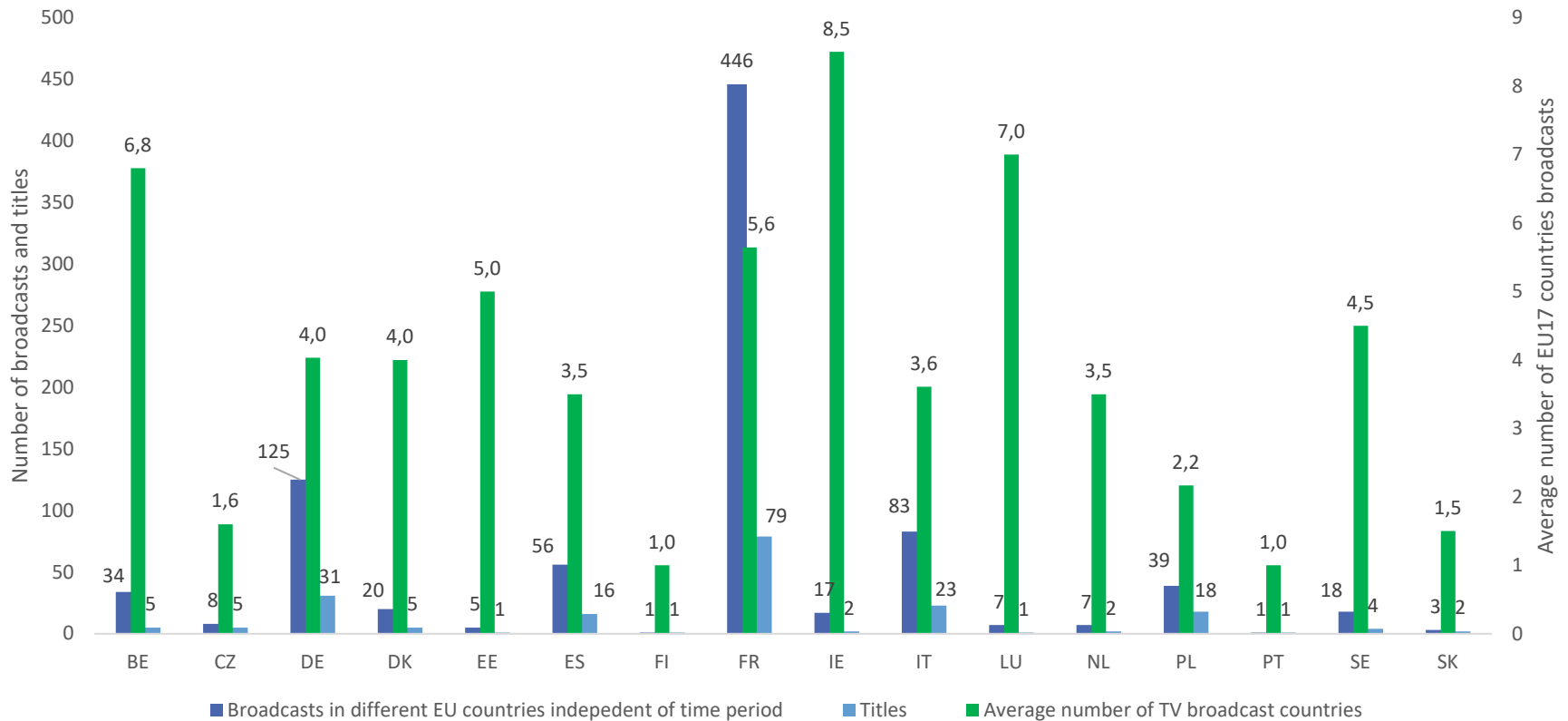
- Films with a production date in 2018 and 2019 - *LUMIERE*
- **On release in EU27 cinemas in 2019** - *LUMIERE*
- With more than 1 000 cumulated admissions in EU27 – *LUMIERE*
- ➔ 1 645 EU27 theatrical film titles of all origins released in EU27 cinemas in 2019 with more than 1 000 admissions.

- TV: **broadcast on TV in EU17 from 2019 to 2022** - *Metaprofile*
- SVOD: **available in SVOD catalogues in EU17 from 2019 to 2022** - *Justwatch*
- TVOD: **available in TVOD catalogues in EU17 from 2019 to 2022** - *Justwatch*
 - For each distribution window and for each EU17 country, a film is counted once
 - **Time-series independent:** A film title available during the period 2019 to 2022 is only counted once for the distribution window and EU17 country even if it was available all four years

On TV, an average circulation in EU17 of 4.4 countries for 196 EU27 film titles

- The 79 French theatrical film titles broadcast on TV achieved on average a country broadcast of 5.6 EU17 countries per title for 446 total broadcasts of French theatrical films on TV channels from 2019 to 2022.
- The highest circulation was achieved by the two Irish film titles, with an average broadcast in 8.5 countries, followed by one Luxembourgish title broadcast in seven EU17 countries.
- The limited number of Portuguese, Czech, Slovakian, Finnish and Polish film titles broadcast on TV had a rather low circulation, rarely achieving circulation beyond their national broadcast markets with an average below or around two countries.

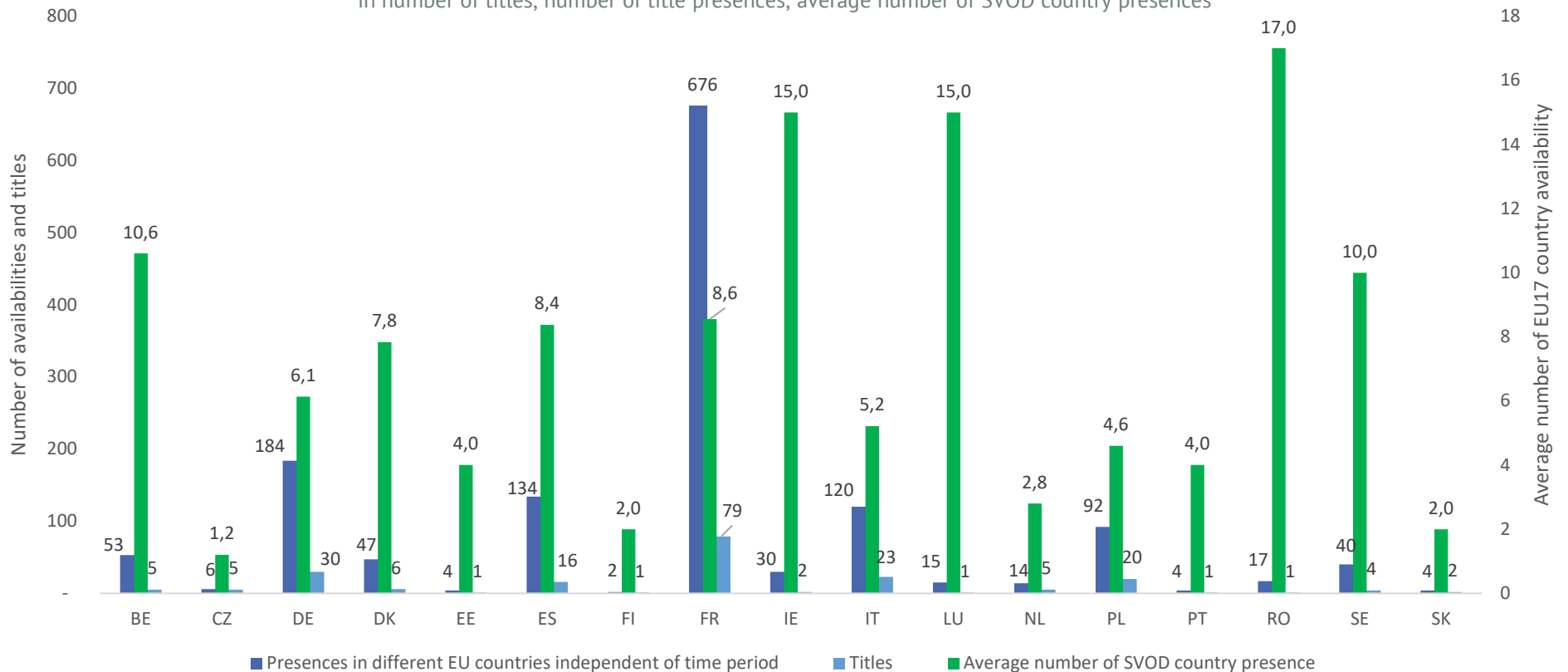
TV - Main production countries of theatrical EU27 films broadcast 2019-2022 in EU17 in number of titles, number of broadcasts, average number of TV broadcast countries



On SVOD, an average circulation in EU17 of 7.1 countries for 202 EU27 film titles

- On SVOD, due to the presence of several global SVOD players, which tend to acquire rights to film titles for several of their country catalogues, the average circulation for EU27 theatrical film titles was much higher than on TV (and a little higher than on TVOD) with 7.2 countries on average.
 - The example of the Romanian film title available in all 17 EU countries demonstrates this enhanced circulation through global SVOD services.
- Except for Czech, Slovakian and Finnish films, all film titles were available in more than two countries, other than their national market.

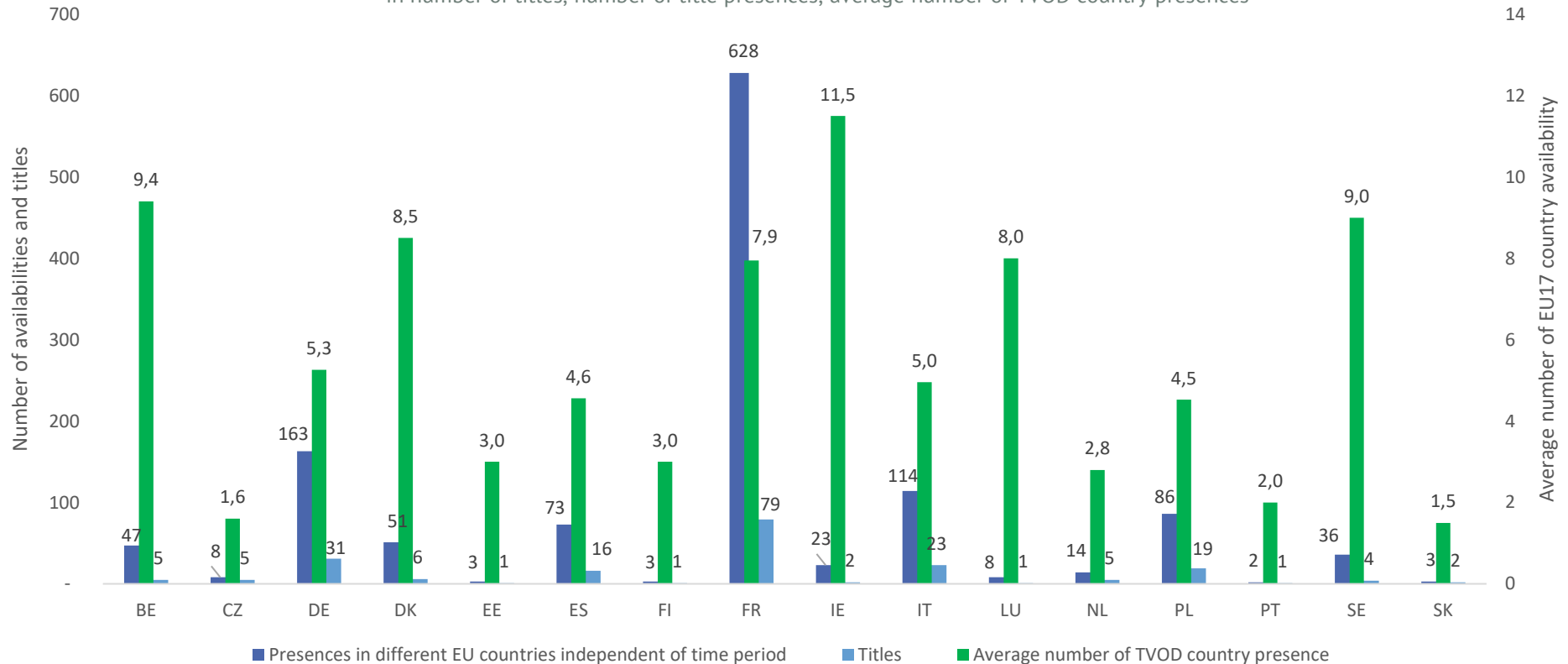
SVOD - Main production countries of theatrical EU27 films available 2019-2022 in EU17 in number of titles, number of title presences, average number of SVOD country presences



In TVOD, an average circulation in EU17 of 6.3 countries for 201 EU27 film titles

- In TVOD, national and global TVOD players tend to complement their US and international film offer with national and other EU non-national films, but unlike SVOD services, TVOD players tailor their film offer to specific markets.
- Two Irish film titles (coproductions) had the highest circulation with an average country presence of 11.5, followed by Belgian, Swedish and Danish film titles.
- French films represented the bulk of film availabilities with 628 film availabilities for 79 film titles and an average country presence of 7.9 in the EU17, while there was only one Finnish, Luxembourgish and Portuguese film title available in TVOD catalogues.

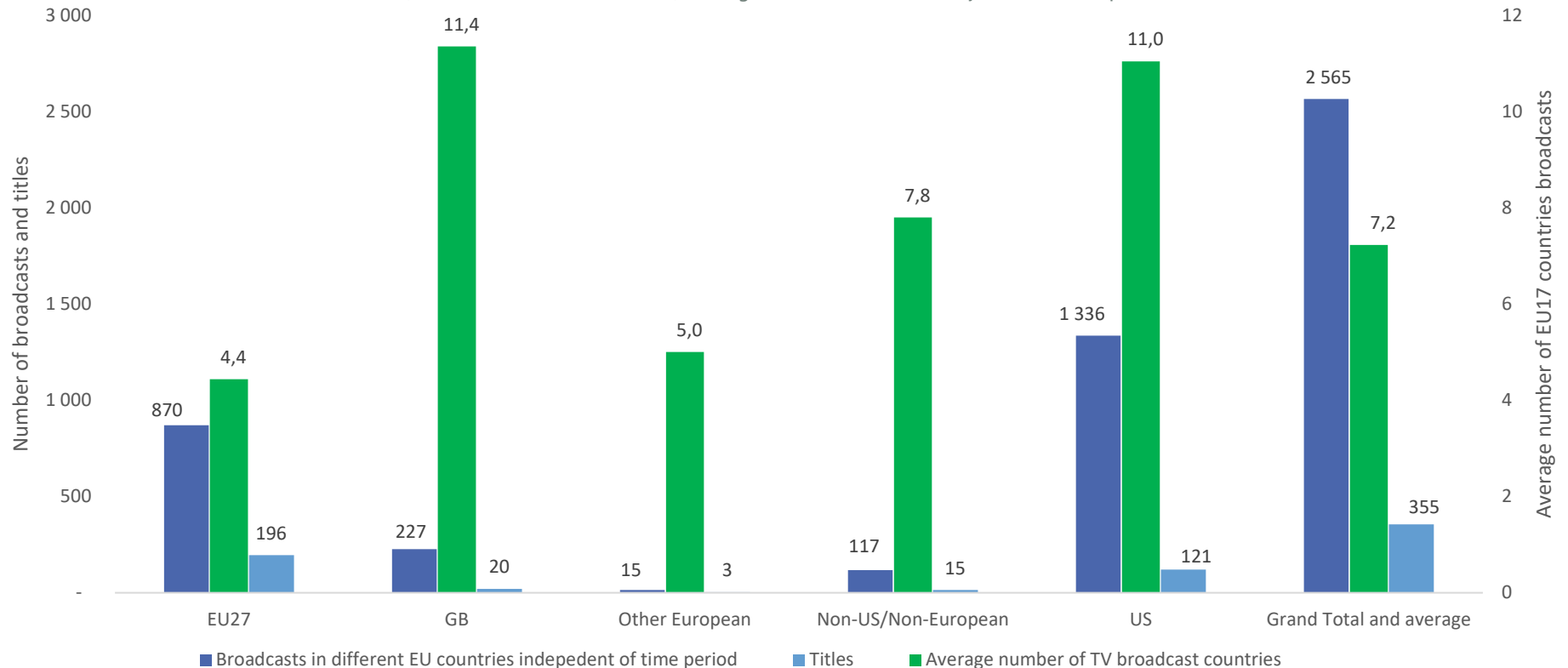
TVOD - Main production countries of theatrical EU27 films available 2019-2022 in EU17 in number of titles, number of title presences, average number of TVOD country presences



Average broadcast in 7.2 EU17 countries for theatrical film titles, with major differences according to their origin

- **British and US theatrical film titles achieved the widest country circulation on TV** with an average broadcast in respectively 11.4 and 11 EU17 countries. US films also accounted for more than 50% of all broadcasts during the period on TV, with a total of 1 336 broadcasts for 121 US theatrical film titles.
- **The 196 EU27 film titles were broadcast on average in 4.4 EU17 countries**, as seen before, due to a wide variance in country circulation according to EU27 production country.
- **Non-US/Non-European film titles were broadcast on average in 7.8 EU17 countries** but the number was limited (15 titles), trailed by other European film titles.

TV - Main production regions of theatrical EU27 films available 2019-2022 in EU17
in number of titles, number of titles broadcast, average number of TV country broadcasts - per title

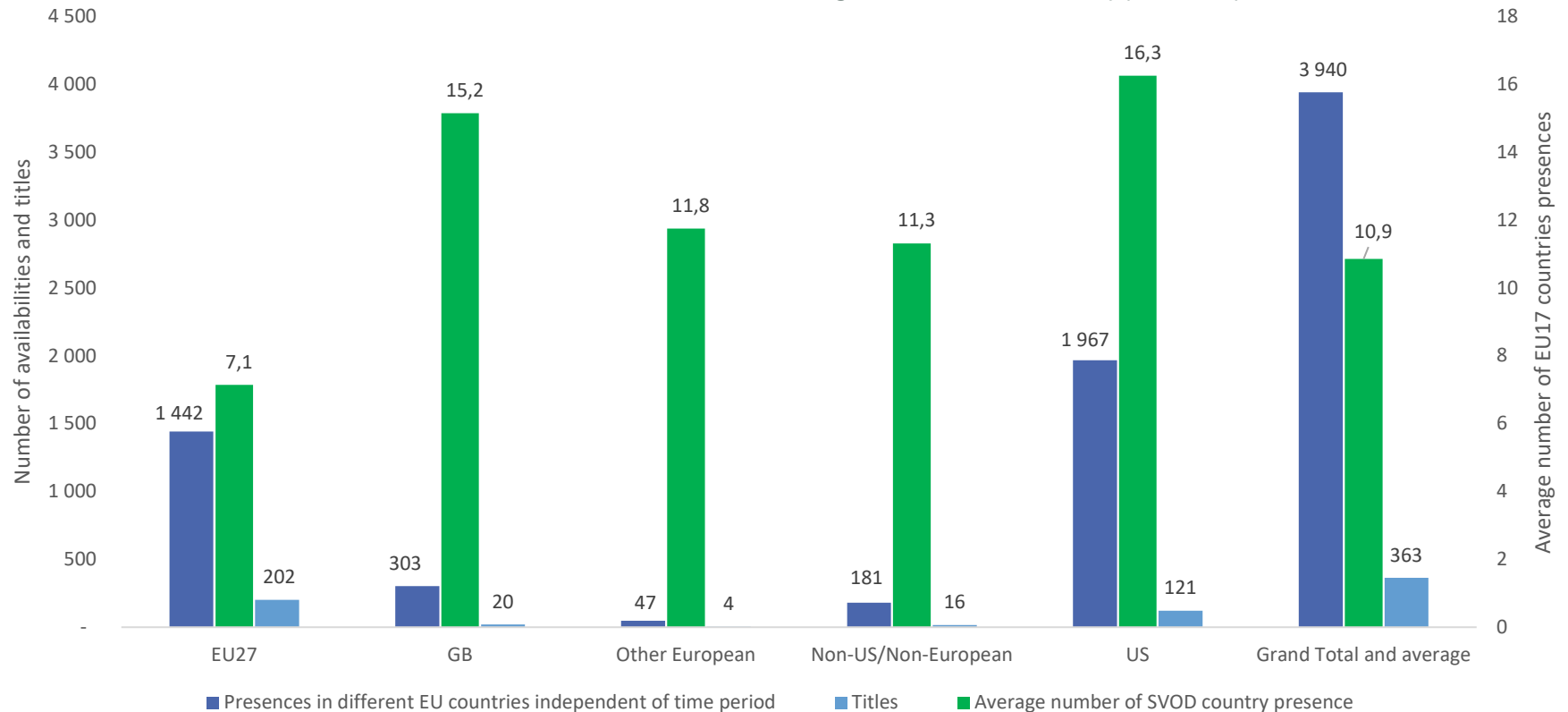


Source: European Audiovisual Observatory, LUMIERE, JustWatch, Metaprofile

Average availability in 10.9 EU17 countries for 363 theatrical film titles on SVOD; wide circulation of US and GB film titles

- With an average presence in 16.3 and 15.2 EU17 countries respectively, US and GB theatrical film titles were available on SVOD in almost all 17 countries on average.
- Non-US/Non-European and other European film titles achieved a wider circulation than on TV, as global SVOD players tend to license film titles for several of their country catalogues.
- EU27 theatrical film titles had the lowest country circulation with 7.1 countries on average for 202 EU27 theatrical film titles. This might demonstrate increased adaptation to local tastes of subscribers by SVOD players.

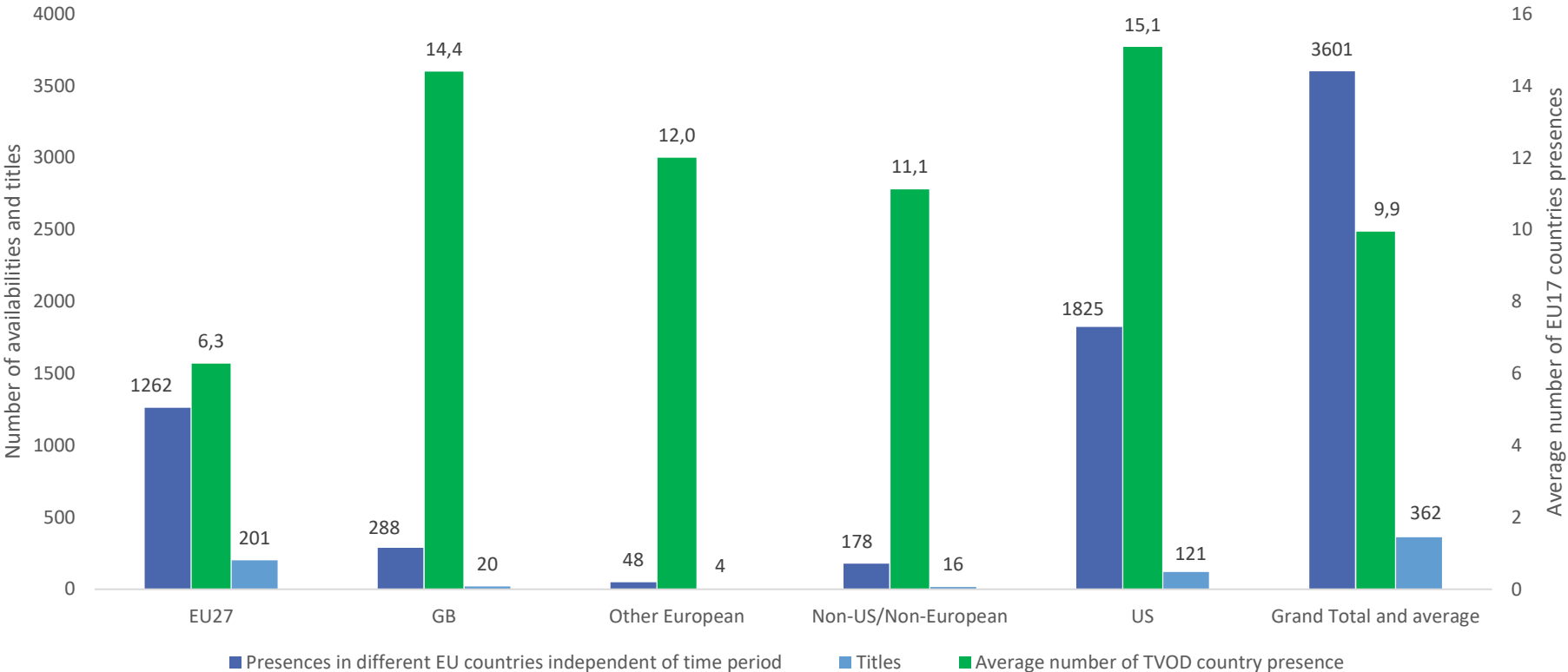
SVOD - Main production regions of theatrical EU27 films available 2019-2022 in EU17
in number of titles, number of titles available, average number of SVOD country presences per title



Average availability in 9.9 EU17 countries for 362 theatrical film titles on TVOD

- Theatrical film titles had a lower country circulation in the EU17 than on SVOD which may be due to the fact that TVOD services localise their film offer more, to cater for local audiences.
- The widest circulation was reached by US and GB theatrical film titles, with respectively an average of 15.1 and 14.4 country presences.
- EU27 film titles were available on average in 6.3 EU17 countries whereas film titles from all other regions were available in at least 11 countries.

TVOD - Main production regions of theatrical EU27 films available 2019-2022 in EU17
in number of titles, number of title available, average number of VOD country presences per title



Source: European Audiovisual Observatory, LUMIERE, JustWatch, Metaprofile

PART B

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THE FILM ANGLE: FROM CINEMA TO TV AND VOD

B.4. Are films simultaneously available on TV, SVOD and TVOD?

B.4. Are films simultaneously available on TV, SVOD and TVOD?

- **Methodology – data setting**

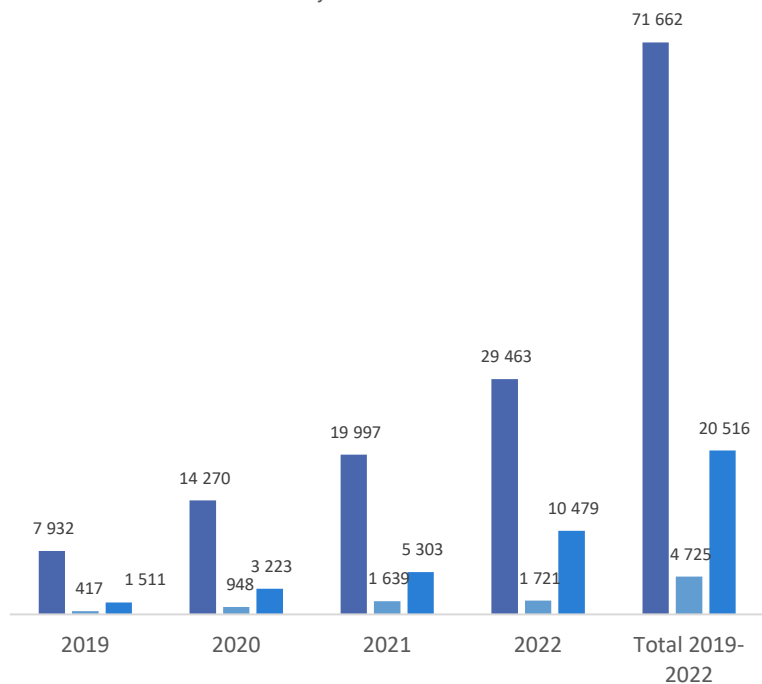
- Films with a production date between 2018 and 2022 - *LUMIERE*
- **On release in EU27 cinemas between 2019 and 2022** - *LUMIERE*
- With more than 1 000 cumulated admissions in EU27 - *LUMIERE*
- ➔ 6 983 theatrical film titles of all origins released in EU27 cinemas between 2019 and 2022 with more than 1 000 admissions

- TV: **broadcast on TV in EU17 between 2019 and 2022** - *Metaprofile*
- SVOD: **available in SVOD catalogues in EU17 between 2019 and 2022** - *Justwatch*
- TVOD: **available in TVOD catalogues in EU17 between 2019 and 2022** - *Justwatch*
- SVOD and TVOD availability are counted once together as VOD availability per country
 - Each country broadcast and VOD availability is counted **once for each year**

Theatrical films are mainly distributed exclusively on VOD or benefit from a dual TV/VOD distribution

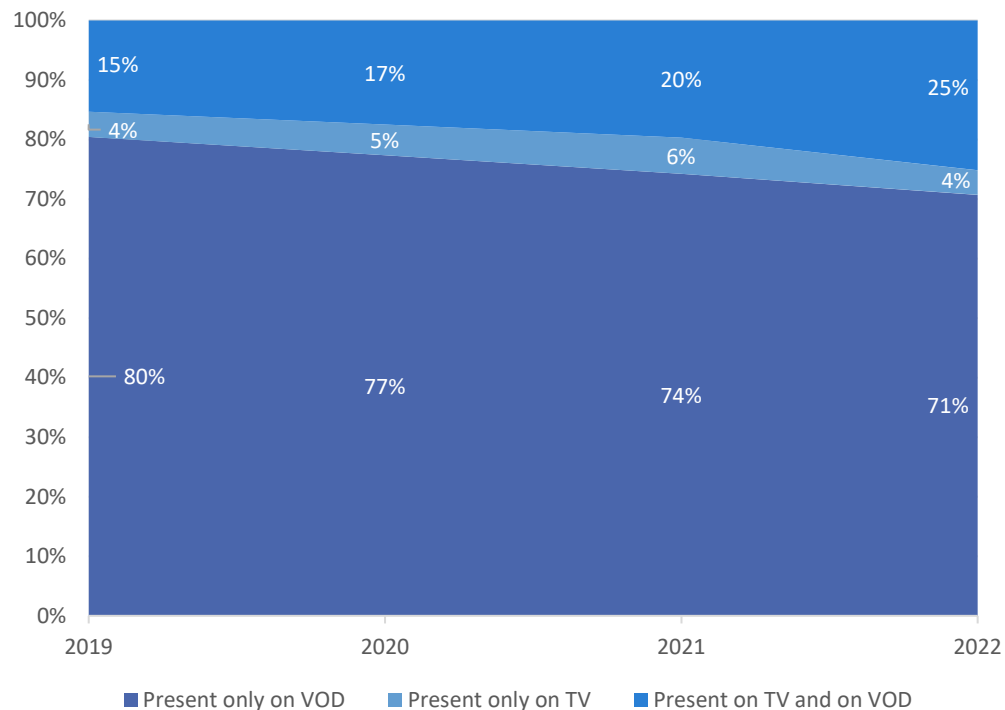
- The year the films are on their first theatrical release, 80% of titles are exclusively available on VOD services in the EU17 and only 4% benefit from an exclusive TV distribution, mainly on pay TV services. 15% of films are dually available on TV and VOD in EU17 countries.
- At the end of the four-year period, the share of films benefitting from dual availability on TV and VOD increases to 25% while the share of films exclusively available on VOD decreases to 71% and the share of films only available on TV remains at 4%.
 - VOD is the main distribution window for theatrical films in the EU17.
 - Dual distribution of theatrical films on TV and VOD increases in the years after their initial theatrical release as rights holders maximise distribution and potential revenues.
 - A low share of theatrical films (4%-6%) is only available on TV, mostly EU27 national theatrical films broadcast in their home country.

Presence of theatrical films by distribution 2019-2022, in EU17
in numbers by distribution window



■ Present only on VOD ■ Present only on TV ■ Present on TV and on VOD

Presence of theatrical films by distribution 2019-2022, in EU17
in % of total by distribution window

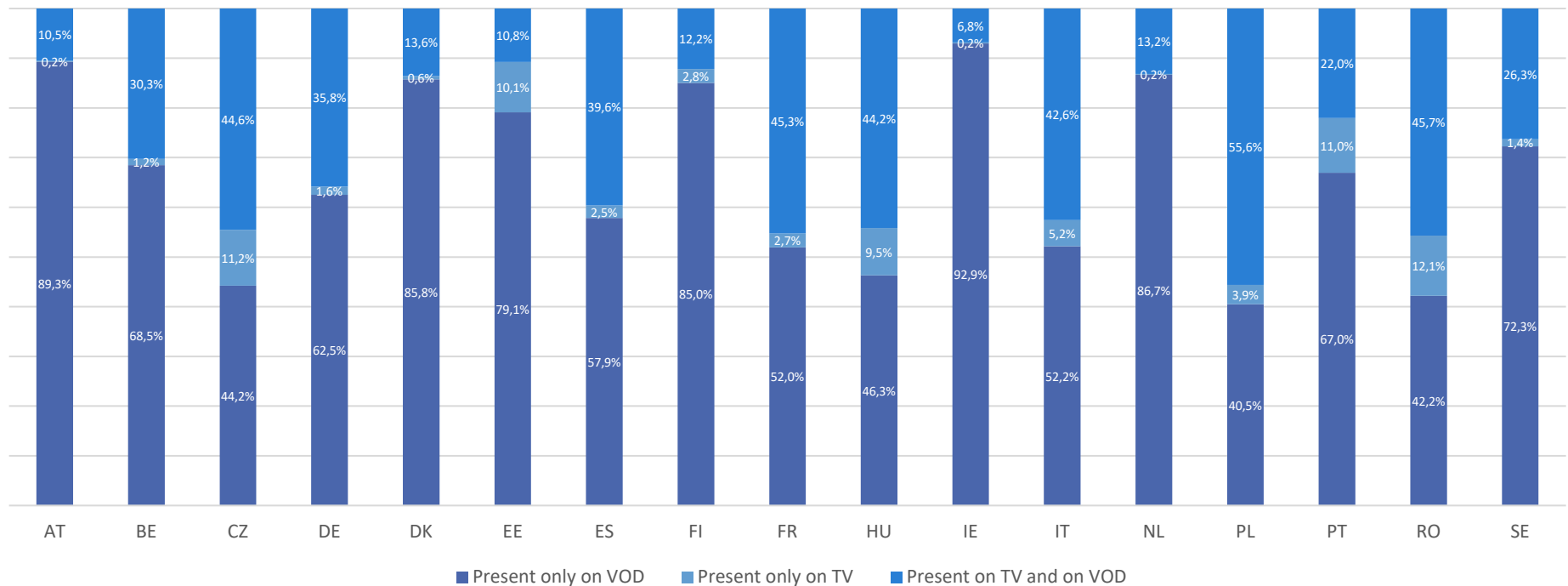


Source: European Audiovisual Observatory, LUMIERE, JustWatch, Metaprofile

Differences in distribution might indicate different viewing patterns and licensing deals in EU17 countries

- In seven countries (IE, AT, NL, DK, FI, EE, SE) more than 70% of films were available only on VOD, while in four countries (HU, CZ, RO, PL) less than 50% of films were available only on VOD.
- Dual distribution of films on VOD and TV, with a share of theatrical films benefitting from a dual distribution window of over 35%, is mostly found in high-volume film production countries (FR, IT, ES, DE) and CEE countries (PL, RO, CZ, HU).
- The highest share of exclusive availability on TV, over 9% of films, is found in four CEE countries (RO, CZ, EE, HU) and PT.
 - Distribution exclusivity might indicate differences in licensing agreements and viewing patterns by audience in the different EU17 countries.

Presence of theatrical films by distribution window 2019-2022
in % of total by distribution window and by country



PART C

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THE CONSUMER ANGLE: HOW MANY THEATRICAL FILMS ARE ACCESSIBLE IN AN EU COUNTRY

C.1. What is the share of theatrical films that are available on VOD and TV in each EU country?

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- **Methodology – data setting**

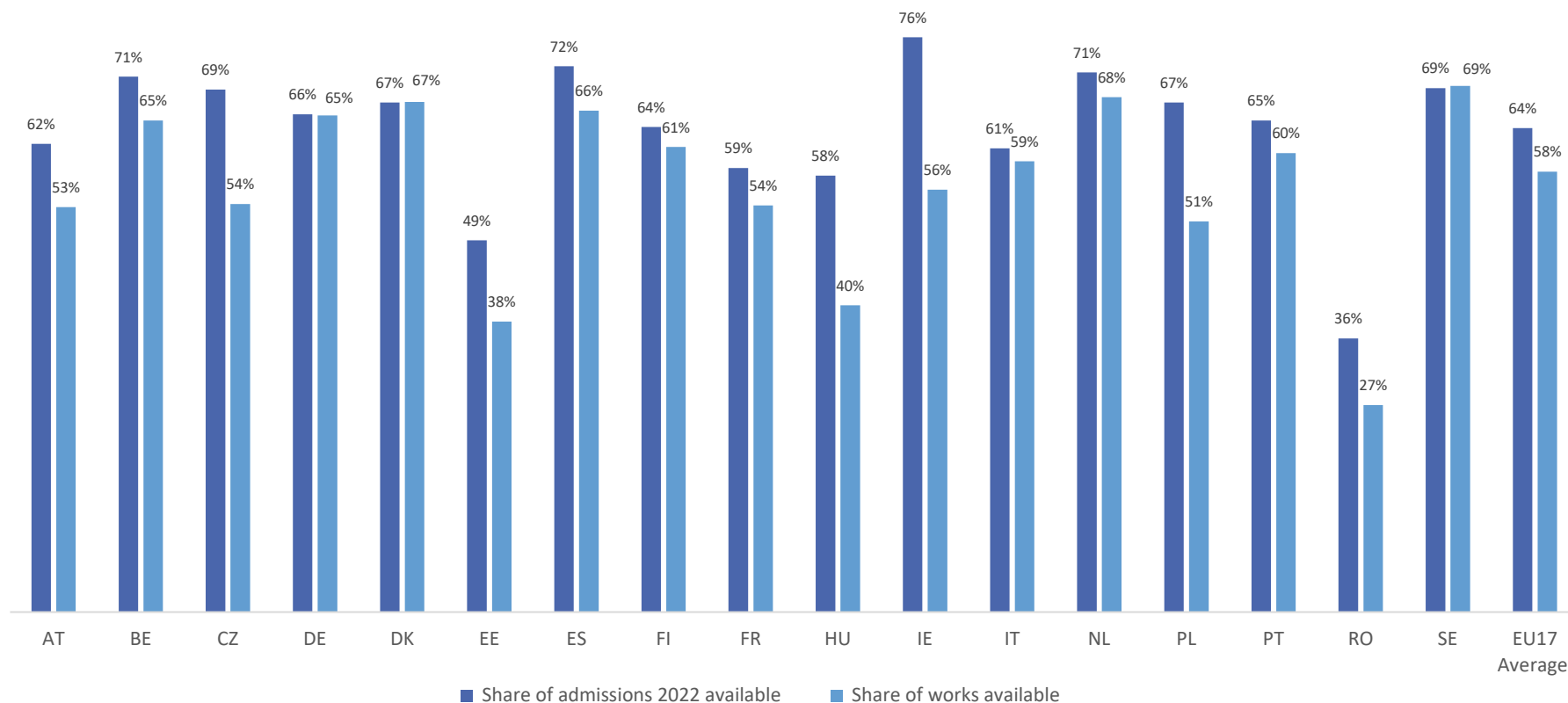
- Films with a production date between 2018 and 2022 - *LUMIERE*
- **On release in EU17 cinemas in 2022** - *LUMIERE*
- With more than 1 000 cumulated admissions in EU17 - *LUMIERE*
- ➔ 2 660 theatrical film titles of all origins released in EU17 cinemas in 2022 with more than 1 000 admissions, representing 482 123 241 admissions

- TV: **broadcast on TV in EU17 in 2022** - *Metaprofile*
- SVOD: **available in SVOD catalogues in EU17 in 2022** - *Justwatch*
- TVOD: **available in TVOD catalogues in EU17 in 2022** - *Justwatch*
 - Each country broadcast, SVOD and TVOD availability of a film is counted once per country as one film availability

In most countries, more than half of all films on release in cinemas are also available on TV and/or VOD

- In 14 EU17 countries, except RO, EE, HU, more than half of the films are also available in at least one of the other three distribution windows, ranging from 51% to 69% of all theatrical films on release in 2022.
- The share of admissions of theatrical films available in at least one of the other three distribution windows was even higher, with 15 EU17 countries having theatrical films available, representing admissions between 58% and 76%.
 - This seems to indicate that successful commercial films in cinemas are made available in EU17 countries in other distribution windows.

Share of films (and their corresponding admissions) available on TV/SVOD/TVOD of theatrical films on release in 2022 in EU17
In % of all films and % of all admissions in country in 2022



PART C

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THE CONSUMER ANGLE: HOW MANY THEATRICAL FILMS ARE ACCESSIBLE IN AN EU COUNTRY

C.2. What is the share of theatrical films released in an EU country that are available on VOD and TV in the same EU country?

C.2. What is the share of theatrical films released in an EU country available on VOD and TV in the same EU country?

▪ **Methodology – data setting**

- Films with a production date between 2018 and 2022 - *LUMIERE*
- **On release in EU17 cinemas between 2019 and 2022** - *LUMIERE*
- With more than 1 000 cumulated admissions in EU17 - *LUMIERE*
- ➔ 6 582 theatrical film titles of all origins released in EU17 cinemas between 2019 and 2022 with more than 1 000 admissions, representing 1 769 608 602 admissions

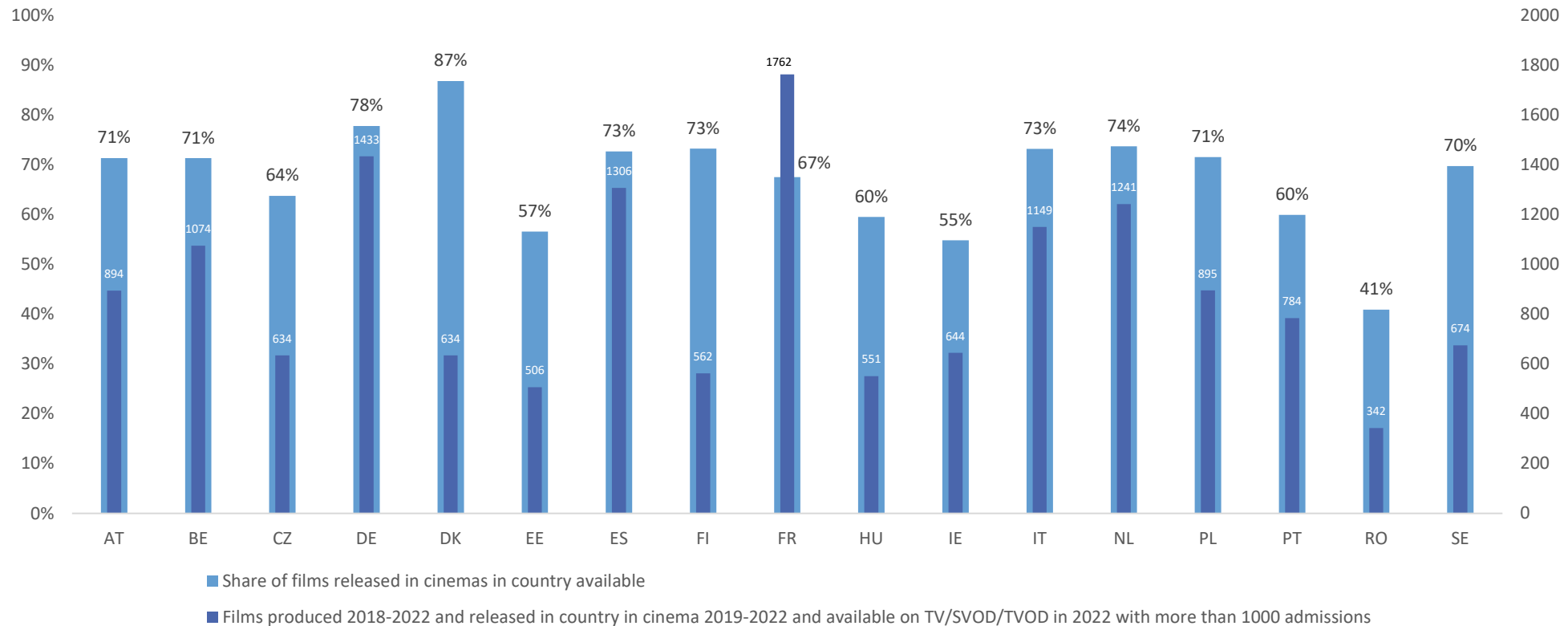
- TV: **broadcast on TV in EU17 in 2022** - *Metaprofile*
- SVOD: **available in SVOD catalogues in EU17 in 2022** - *Justwatch*
- TVOD: **available in TVOD catalogues in EU17 in 2022** - *Justwatch*
 - Each country broadcast, SVOD and TVOD availability of a film is counted once per country as one film availability

Between 41% and 87% of all films on release 2019-2022 were available in at least one other distribution window

- With 87% of all theatrical films released from 2019 to 2022 available in another distribution window in 2022, Denmark had the highest share of theatrical films distributed in another window. With 41% of theatrical films available in another window, viewers in Romania had the least access to theatrical films in another window.

➤ In most EU17 countries, theatrical films released in the country are also made available in another distribution window.

Share and number of films available on TV/SVOD/TVOD of theatrical films on release 2019-2022 in each EU17 country
In % of all films on release and absolute number in 2022



PART C

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THE CONSUMER ANGLE: HOW MANY THEATRICAL FILMS ARE ACCESSIBLE IN AN EU COUNTRY

C.3. To what extent do TV and VOD bring to a country films that have never been released in that country?

C.3. To which extent TV and VOD bring to a country theatrical films never released in the country?

▪ **Methodology – data setting**

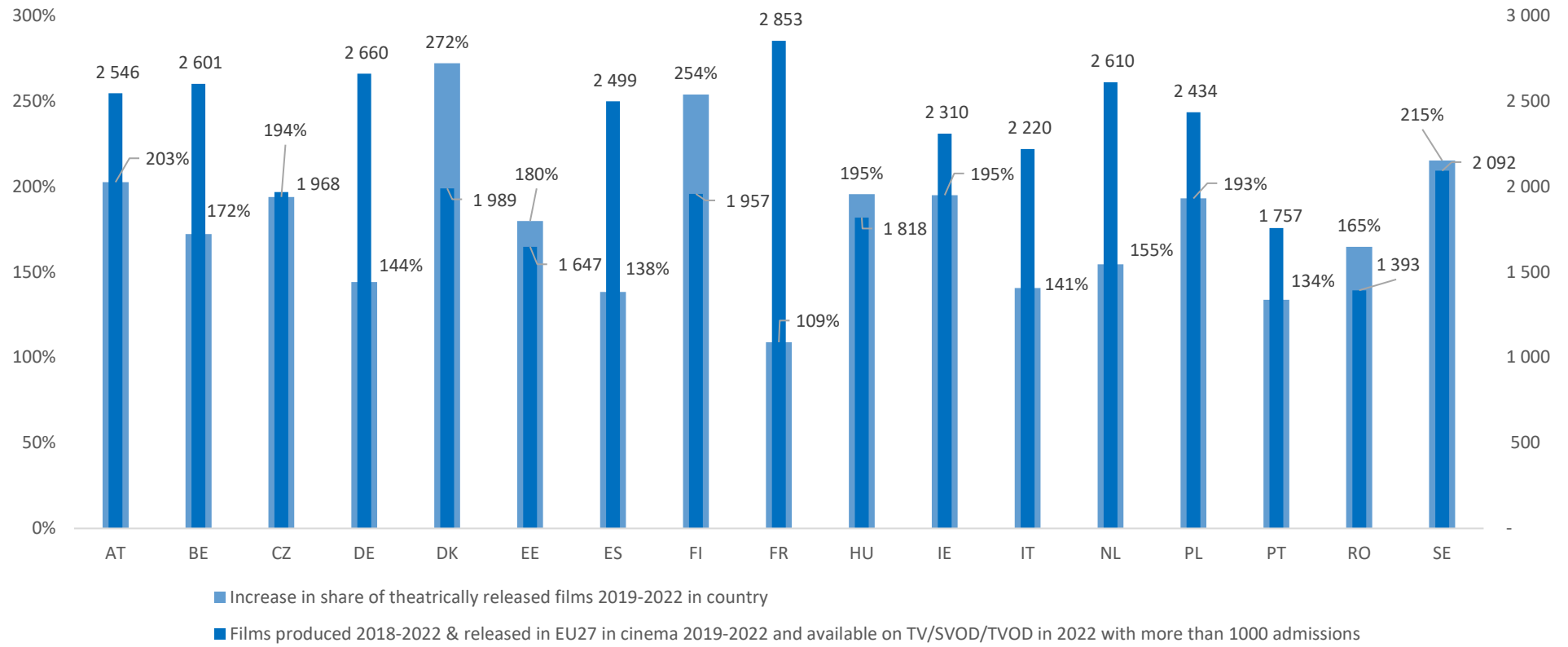
- Films with a production date between 2018 and 2022 - *LUMIERE*
- **On release in EU27 cinemas between 2019 and 2022** - *LUMIERE*
- With more than 1 000 cumulated admissions in EU27 - *LUMIERE*
- ➔ 6 983 theatrical film titles of all origins released in EU27 cinemas between 2019 and 2022 with more than 1 000 admissions, representing 1 855 636 884 admissions

- TV: **broadcast on TV in EU17 in 2022** - *Metaprofile*
- SVOD: **available in SVOD catalogues in EU17 in 2022** - *Justwatch*
- TVOD: **available in TVOD catalogues in EU17 in 2022** - *Justwatch*
 - Each country broadcast, SVOD and TVOD availability of a film is counted once per country as one film availability

EU27 theatrical films not released in cinemas in the country are made available on VOD services and TV channels

- The main benefit of VOD and TV distribution windows appears to be the circulation of theatrical films which were not released in cinemas in the country but had a theatrical run elsewhere in the EU27.
 - VOD catalogues, and to a lesser extent TV channels, do not have the same capacity (and commercial) constraints as cinemas and therefore make more films available than are released in cinemas.
 - VOD services and TV channels could also pick up theatrical films that have been relatively successful in another EU27 country and are culturally close to their audiences, or to complement their film offering.

Number and increase in share of theatrical films available on TV/SVOD/TVOD of theatrical films on release 2019-2022 in EU27
In % of all films on release and absolute number in 2022, by country



Source: European Audiovisual Observatory, LUMIERE, JustWatch, Metaprofile

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