Films on EU screens: A comparative analysis of the film offering in cinemas, on VOD and on TV

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Key findings

Key findings (1/4)

This reports addresses the exploitation of European Union (EU) and other European films on EU screens from **three different angles**:

- A **film angle**, with the objective to describe the portfolio of film actively exploited in the EU in 2022.
- A **consumers' angle**, with the objective to describe the portfolio of films available in each European Union country.
- A **market angle**, with the objective to describe the market shares in the supply of films to European consumers.

A. The film angle: which films were exploited* in the European Union in 2022?

Video-on-demand (VOD) has changed the paradigm the way films are exploited films and has probably about doubled the number of films in exploitation. The number of different films exploited in the European Union in 2022 **(over 128 000)** is, indeed, almost overwhelming. **The key role of VOD** can be highlighted in two ways:

- VOD (be it Transactional VOD [TVOD], Subscription VOD [SVOD] or Advertising VOD [AVOD]) accounted for 70% of exploitations**.
- To a large extent (over 60%), films made available on VOD were not available in cinemas or on TV.

Among these 128 000 films exploited in 2022, **49 000 films** originated from the European Union films. They belonged to two categories:

- **Films never theatrically released in the EU,** (42%) a category which comprises mainly TV films, streamers' films, direct-to-DVD films rereleased on TV or on VOD.
- **Films theatrically released in the EU (58%).** These films include the vast majority (67%) of EU theatrical films released since 1996**. Quite logically, the more recent a theatrical film was, the more likely it was to be still exploited in 2022. But **the films not in exploitation** in 2022 were the least successful in cinemas and represent together about **5% of admissions** to EU films since 1996.

* Screened at least once in cinemas, TV or VOD in at least one EU country.

** 1 exploitation = 1 film exploited on 1 window

***Data for films released before 1996 not available.

Key findings (2/4)

B. The consumers' angle: how many different films were available in an EU country?

On average, an **EU consumer** had access to close to 40 000 different films in 2022 (including over 6 300 available for free on AVOD or on free TV). Still, the number of films available **varied greatly according to the country**, from 24 000 in Romania to 58 000 in Germany. Given the key quantitative role of VOD in the supply of films, this variation can be chiefly attributed to the differences in the number of VOD services available.

Among the 40 000 different films available on average for an EU consumer, over 13 000 were European films, including over **EU 9 000 films**. Here again the number of EU films varies significantly between member states, from over 5 000 in Romania to over 13 000 in Austria. In all EU countries but France, the majority of these EU films were **EU non-national**, and in 13 EU countries, EU non-national accounted for more than 90% of EU films available.

C. The market angle: where do cinemas, broadcasters and VOD services source their films from?

Looking at the supply of films in terms of **presence*** leads to the same conclusion than when looking at films in exploitation: **VOD plays a key role**, representing 88% of the total supply. Hence, the overall structure of the supply of films reflects the structure of the supply of films on VOD. Among VOD, TVOD is the leading segment, followed by SVOD, and AVOD still only plays a limited role. The supply of European and EU films also reflects the prominence of VOD.

Unsurprisingly, **US films** represent almost 50% of all films on supply in the EU. But the share of US films is significantly lower:

- on the one hand, in **SVOD** (they are substituted to an extent by films originating outside the US or Europe (Asia in particular);
- on the other hand, **in cinemas** (where EU films alone account for the majority of films on supply).

* Presence: each country (cinema), TV channel or VOD service where the film is available is accounted for.

Key findings (3/4)

At EU level and all windows considered, the **share of the EU films** stands at 23% of films on offer, complemented by 10% of other European films (with UK films alone accounting for 8%). But when focusing **only on films theatrically released** in the EU, the share of EU films is significantly higher (30%), as TVs and VOD services provide a number of non-EU films never theatrically released in the EU (typically US films released in the US but not in the EU, or direct to VOD “films”).

The weight of EU films has to be nuanced between genres: of note is the fact than the EU seems to be particularly **underperforming regarding animation** across all windows.

As mentioned above, the number of films available in the **member states** significantly varies, and so does the **origin of these films**. On average, as regards European works, member states rely much more on **non-national works** (79%) than on **domestic works** (21%). And among non-national European works, the EU achieves a 61% market share vs. 39% for non-EU countries. But the landscape significantly varies between member states.

On the one hand, the share of **European works** seems to be correlated to the share of national works:

- **High-producing countries** (e.g. France, Germany, Italy) achieve a higher share of European films thanks to their national films.
- A second group of **intermediate countries** include Spain, Denmark, Sweden, Czechia, Poland, Finland, the Netherlands and Greece.
- **Smaller countries** draw significantly on non-national works, but not to the extent to achieve similar share of European films than high-producing countries, probably due to limits to importing national content from another country. However, some smaller from **neighbouring another country sharing the same language** (e.g. Austria, Belgium).

Key findings (4/4)

On the other hand, when complementing domestic works with European non-national works, member states use **a different mix of EU27 non-national and non-EU27 European works:**

- **Some smaller countries favour EU27 non-national works:** Austria, Belgium and Slovakia (benefitting from a common language with Germany, with France and the Netherlands and with Czechia, respectively), Romania (with a significant inflow of films from France) and Croatia (with a strong inflow of films from Spain).
- Ireland represents **a special case** of its own, as the common language with United Kingdom translates in a higher than on average share of non-EU European works.
- Sweden, Denmark and Finland **rely more than on average on non-EU European works,** part of the explanation deriving in the proximity with Norway.

Focusing on non-national works leads to the **analysis of the main exporters of European films** in and to the EU, be it EU member states or European countries. In this regard, the highest market shares go **to the high production countries**. The UK (31% of all exports) and France (17%) are followed at a distance by Germany (10%), Italy (6%) and Spain (6%), accounting together for 70% of total exports.

As mentioned above, the ranking of the main exporters reflects mainly exports in VOD. However, there are nuances between windows:

- France has a larger **market share in cinemas** than on TV and on VOD. The same applies to a lesser extent to Italy.
- Conversely, the United Kingdom is **stronger for exports on VOD and on TV** than in cinemas. The same applies to a lesser extent to Spain and to Germany.

* Exports: each presence in an EU non-domestic country (cinemas), TV channel and VOD service.

Introduction and methodology

This report provides a comparative analysis of the supply of films in cinemas, on VOD and on linear television in 24 EU27 markets.

The general approach and its limitations

- Comparing three very different windows (cinemas, VOD and television) faces limits as films are available on each of them following different patterns (number of screenings in cinemas, number of broadcasts on television, duration of the availability on VOD catalogues). Considering the data available at the European Audiovisual Observatory, three rather different datasets have been used:
  - For cinemas, all films on release in 2022 in the 24 EU27 markets covered by the report.
  - For VOD, all films available on VOD in December 2022 in the 24 EU27 markets covered by the report.
  - For television, all films broadcast at least once in 2022 in the 24 EU27 markets covered by the report.
- This approach has several limitations:
  - Due to a lack of data, cinema releases are accounted for at the country level, whatever the number of cinemas the film has been released in. Conversely, each broadcast by a different TV channel and each presence on a different VOD service is accounted for. **The share of cinemas in the supply of films is therefore underestimated when comparing the role of each window in the supply of films.**
  - The very large size of VOD catalogues implies that the weight of **VOD is decisive when calculating total data for cinemas, VOD and television.**
  - However, the approach does not hinder other indicators such as the number of different films in exploitation or the comparison of the age or origin of films between windows.

Other limitations

- The allocation of country of origin for films broadcast on TV is mostly based on IMDb and may be wrong for individual films. However, the top-grossing films in cinemas have been checked by the Observatory. For films available on VOD, several databases have been used to assess the correct production countries: LUMIERE, IMDb, Wikidata (with an error rate of less than 2% for incorrect identifications).
- Genres: the classification of works as animation, documentary and fiction has big limitations as programmes are tagged with several non-comparable tags. When a film genre includes 'animation' it is classified as 'animation'; the same is true for 'documentary'; all other films are classified as fiction.

Definitions

- Markets: All EU27 markets except Malta, Luxembourg and Cyprus, for which at least one set of data was not available.
- Only the first country of production is considered in assessing the region of origin.
- Origin of works: the report systematically provides a breakdown of films between the following regions of origin:
  - EU27 films
  - Other European films; when relevant the share of the United Kingdom within "Other European" works is indicated
  - US films
  - Other films

  Films from former Czechoslovakia and Yugoslavia are classified as "Other European".

Definitions (continued)

- Counting of films:
  - Films are accounted for by number and not by duration.
  - Only the first run is accounted for on television.
- Theatrical vs. non-theatrical films
  - "Films" are whichever work is labelled as film in a VOD catalogue or in a television schedule.
  - A theatrical film is a film released in cinemas in at least one EU27 country.
  - Exports: one export means one cinema release or one presence in a VOD catalogue or one broadcast by a TV channel from a country other than the main producing country.

The datasets

- Cinema releases: the dataset is drawn from the Observatory LUMIERE database. The main source for LUMIERE is the network of national film agencies.
- Films on VOD: the dataset comprises the December 2022 film catalogues of 979 VOD services (193 TVOD, 661 SVOD and 125 FOD). The data was provided by JustWatch and checked by the Observatory.
- Films on TV: the datasets comprise all the 2022 first runs of films of 878 linear TV channels. The data was provided by Metaprofile and checked by the Observatory.

The content of the report

The report successively addresses the following research questions:

- **Films on exhibition**: How many films were on exhibition in 2022? What was their region of origin? How many were theatrical films? How many theatrical films released since 1996 were on exhibition in 2022? In how many windows were films exhibited?
- **Films available per country**: On average, how many films were available in an EU country? How many EU and European films were available ? How many films were available for free?
- **Film presences**: What was the weight of each window in the supply of films? What was the region of origin of films available? What was the region of origin for theatrical films? What was the weight of EU non-national films? What were the genre and age of films on supply?
- **Exporters of European films**: Which countries exported the most European films in the EU?

More detailed analysis of each individual window can be accessed in dedicated Observatory reports.

European Audiovisual Observatory

A. How many films were on exploitation?

This section follows a film angle. Any film screened at least in one window and in one country is considered on exploitation. The number of services, windows and countries of exploitation on which the film was available is not taken into account.

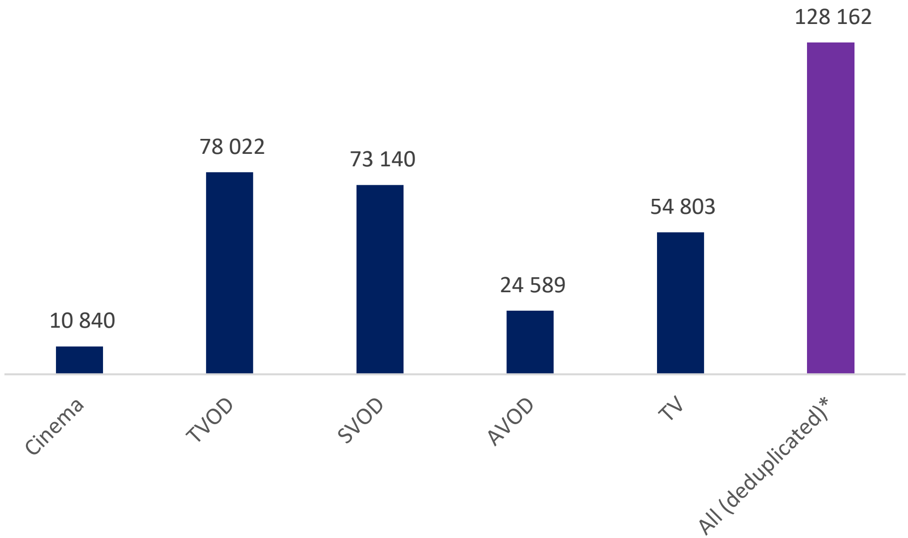
Films on exploitation

Number of films on exploitation

In 2022, there were over 128 000 different films on exploitation in cinemas, on VOD or on TV in the EU.

Over 61 000 were European films (48%), including 49 000 EU27 films (38%).

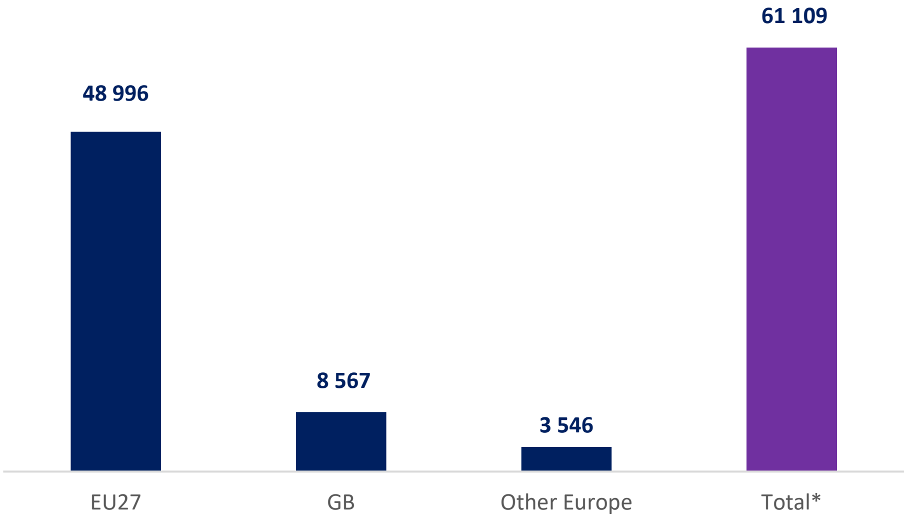
Number of different films exploited in cinemas, on VOD or on TV (2022)



*: Only films with an imdB identifier were considered for deduplication; the total number of films on exploitation is therefore underestimated.

Source: European Audiovisual Observatory

Number of different European films exploited in cinemas, on VOD or on TV (2022)



*: Only films with an imdB identifier were considered for deduplication; the total number of European films on exploitation is therefore underestimated.

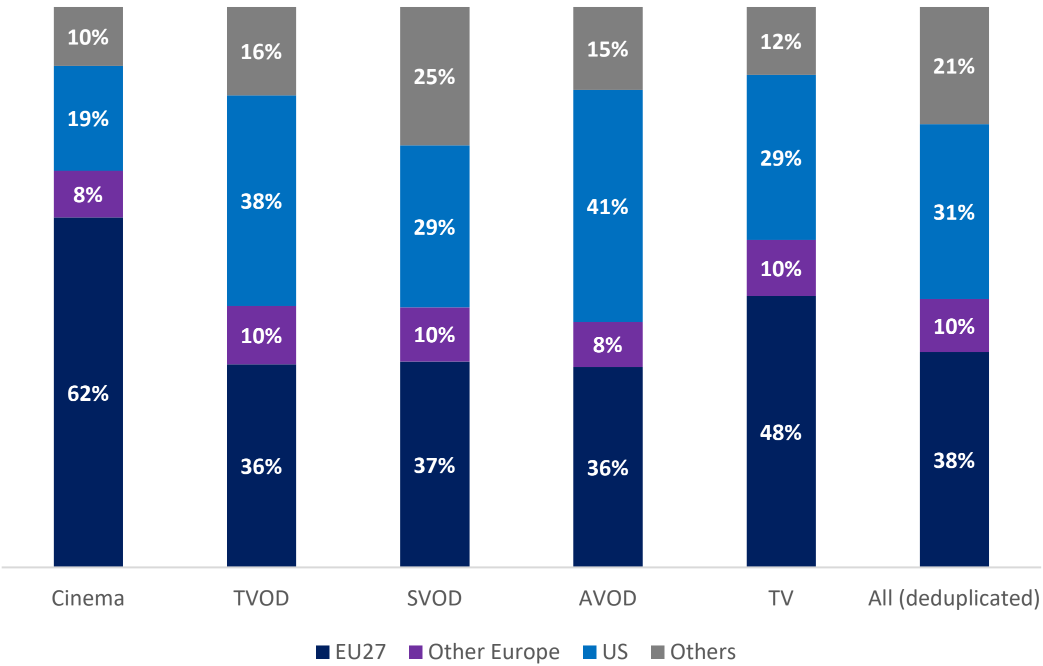
Source: European Audiovisual Observatory

Origin of films on exploitation

Cinema offers the largest share of EU27 and various other European films, followed at a distance by television.

The proportion of EU27 and other European films is lower for all types of VOD services.

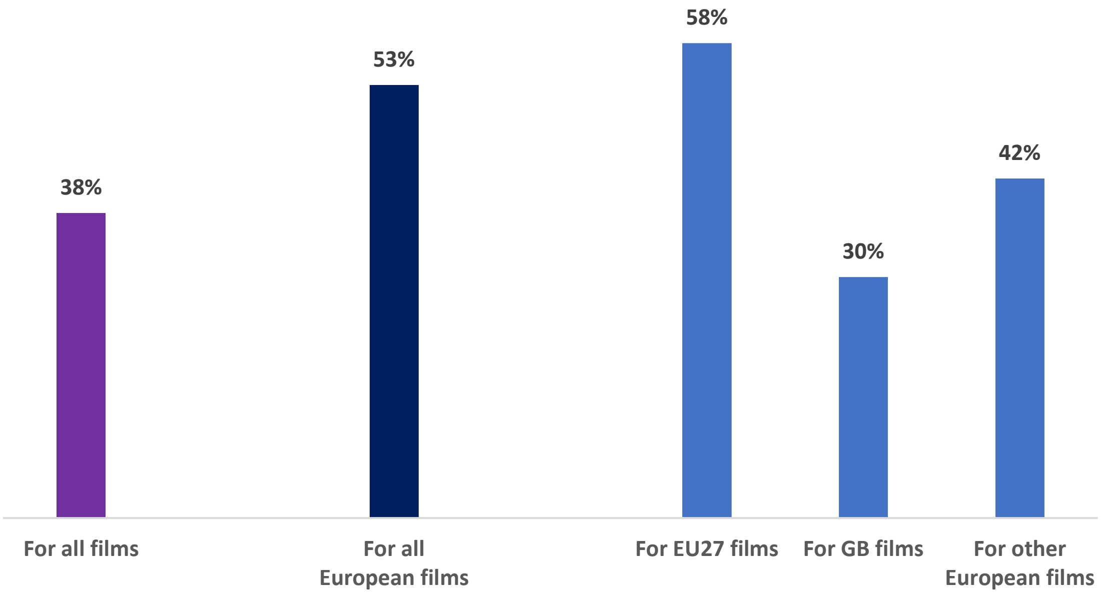
Origin of films exploited in cinemas, on VOD or on TV (2022)



Source: European Audiovisual Observatory

Among films produced in 1996 or later, films theatrically released in the EU accounted for 38% of films on exploitation. The share of theatrical films was significantly higher for European films (53%) and EU27 films (58%), as many US films go directly to VOD in Europe, without a theatrical release in Europe.

Share of theatrical films among films on exploitation in 2022 (only films produced in 1996 or later)



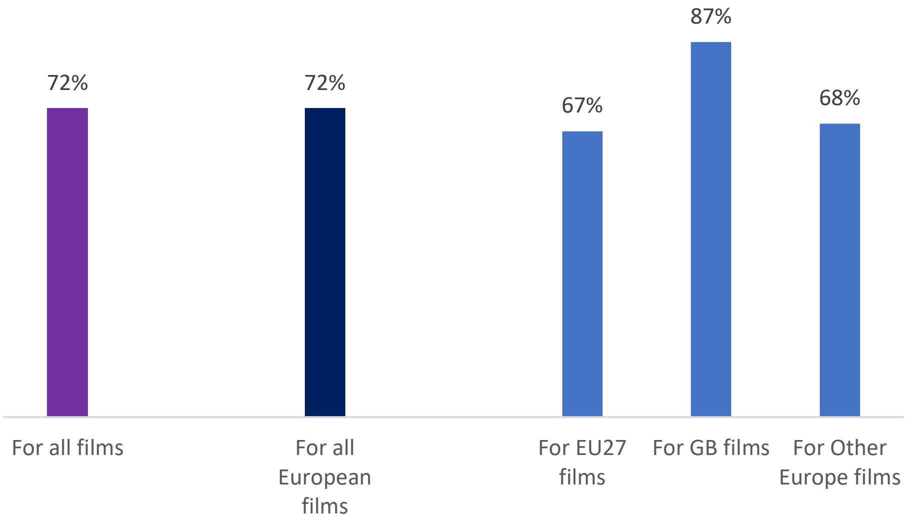
Source: European Audiovisual Observatory

Films on exploitation — Exploitation of 1996-2021 theatrical films in 2022

67% of all EU films theatrically released in the EU between 1996 and 2021 were exploited in cinemas, on VOD or on TV in 2022.

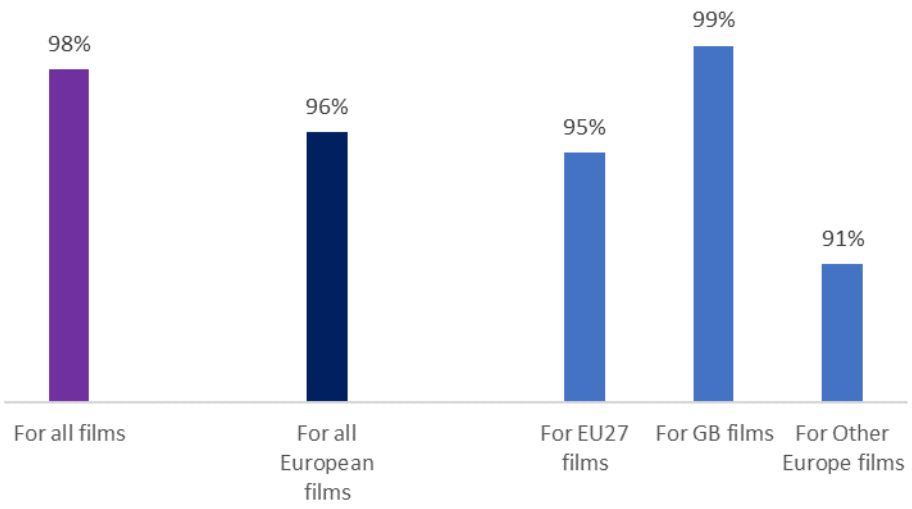
These 2007-2021 EU27 films on exploitation in 2022 accounted for about 95% of all cinema admissions to EU27 films between 1996 and 2021.

Share of films theatrically released in the EU between 1996 and 2021 exploited in 2022



Source: European Audiovisual Observatory

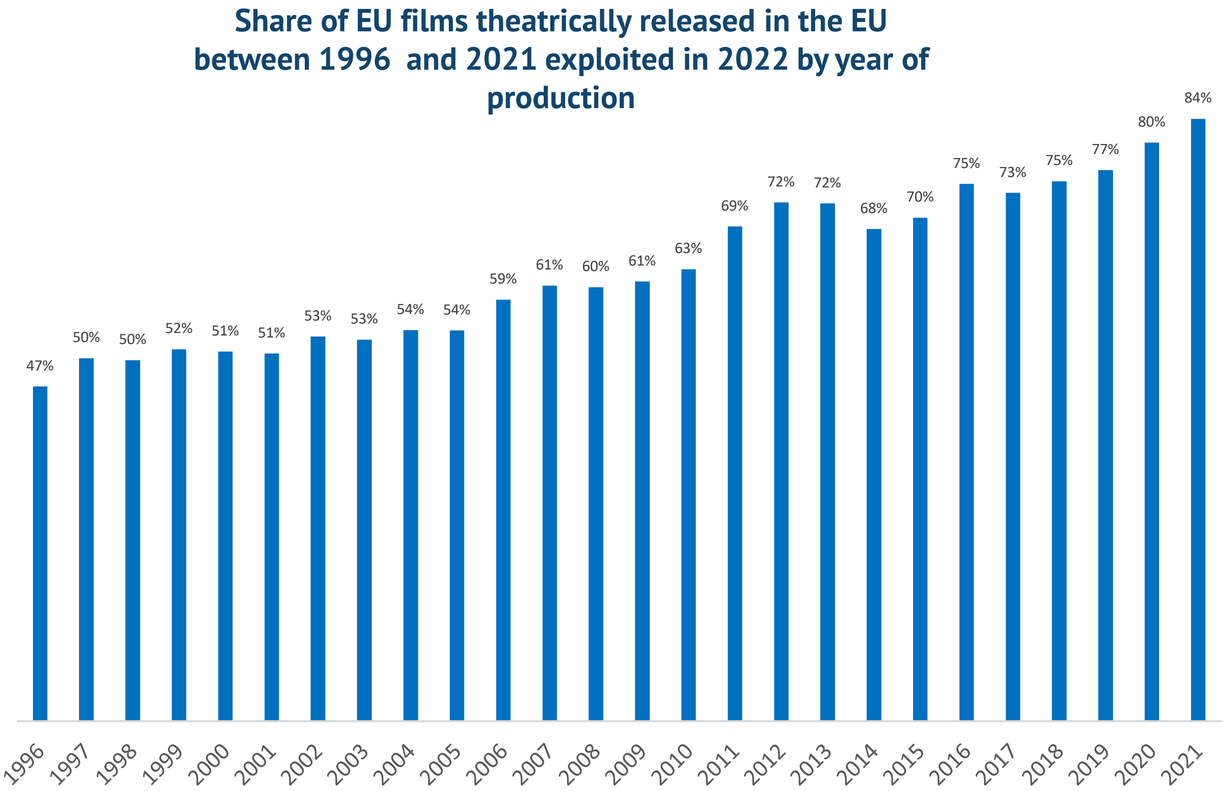
Share of 2007-2021 cinema admissions of theatrical films exploited in 2022



Source: European Audiovisual Observatory

Films on exploitation — Exploitation of 1996-2021 theatrical films in 2022

The share of EU theatrical films produced between 1996 and 2021 available in 2022 in at least one exploitation window increases with the recentness of the film.



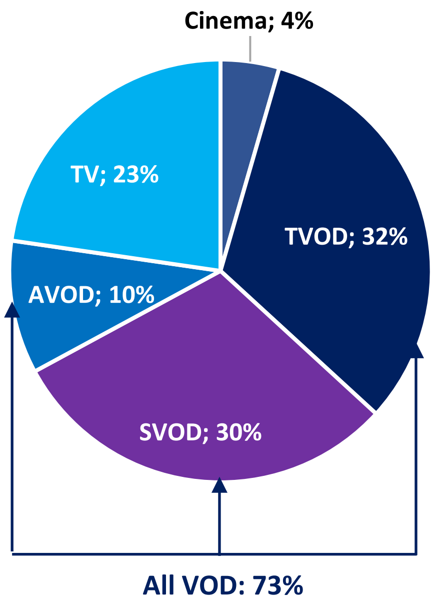
Source: European Audiovisual Observatory

Films on exploitation

Weight of each exploitation window

VOD (primarily TVOD and SVOD) plays by far the lead role in the exhibition of films, both for films of all origin (73%) and for European films (70%).

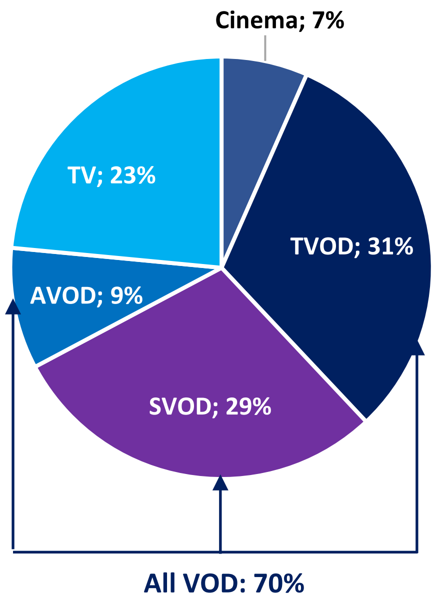
Share of each window in the exploitation of films (2022)*



* Cumulated: each exhibition in 1 window is accounted for once.

Source: European Audiovisual Observatory

Share of each window in the exploitation of European films (2022)*



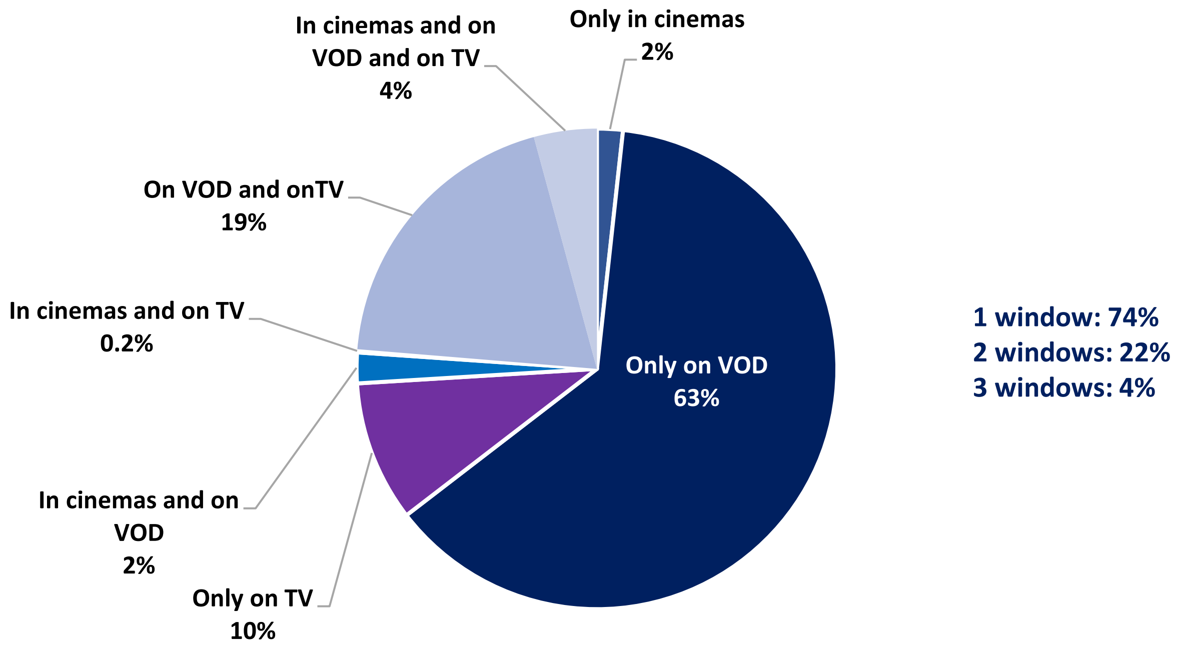
* Cumulated: each exhibition in 1 window is accounted for once.

Source: European Audiovisual Observatory

The vast majority (74%) of films on exploitation in 2022 were available in one window.

- VOD accounted for most of the films exploited only in this window, with 63% of the films available only on VOD.
- With regard to exploitation in two windows, the most common form of exploitation was on VOD and on TV (19%), followed by VOD and cinemas (2%), and on TV and in cinemas (0.2%).

Breakdown of films on exploitation by number of exploitation windows (2022)*



Source: European Audiovisual Observatory

B. How many different films were available in an EU27 country?

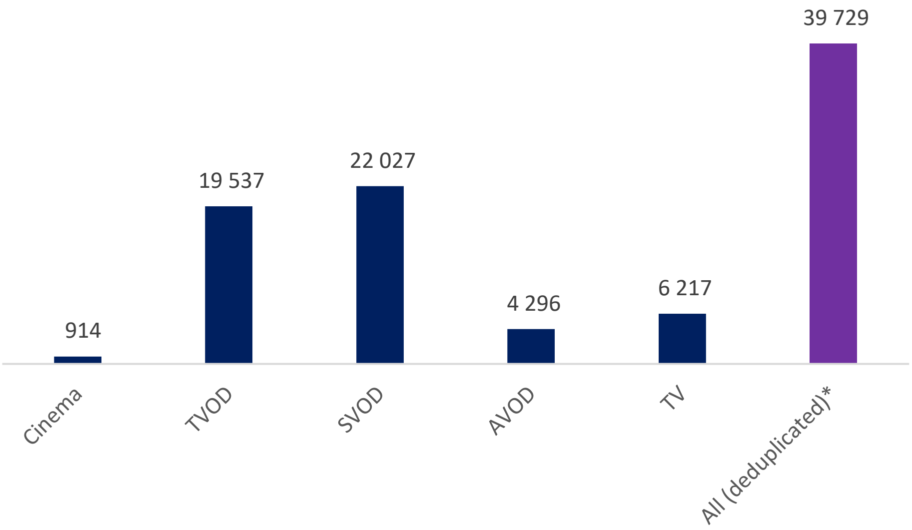
This section follows a consumers' angle. Any film screened at least in one window in a given country is considered to be available. The number of windows of exploitation and services on which the film was available is not taken into account.

Films available

Average number of films available per country

On average, in 2022, close to 40 000 different films were available in an EU country, including over 13 200 European films.

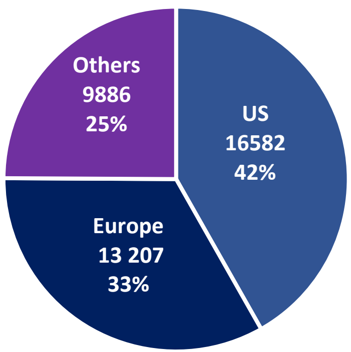
Average number of films available per country (2022)



Note: Only films with an IMDb identifier were considered for deduplication; the total number of films available per country is therefore underestimated. Excludes films for which the origin was not available.

Source: European Audiovisual Observatory

Average number of films available per country by origin (2022)



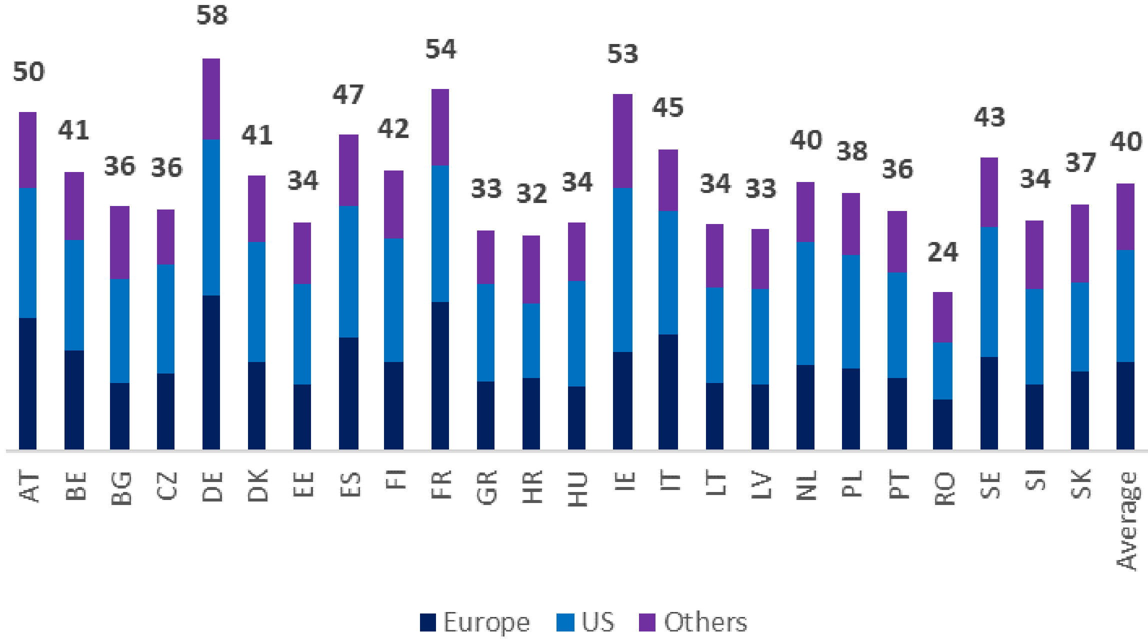
Source: European Audiovisual Observatory

Films available

Average number of films available per country

The number of films available ranges from over 23 000 to over 58 000. Please note that the figures by country are impacted by the number of TV channels and VOD services included in the sample for each country.

Average number of films available per country (in thousand, 2022)



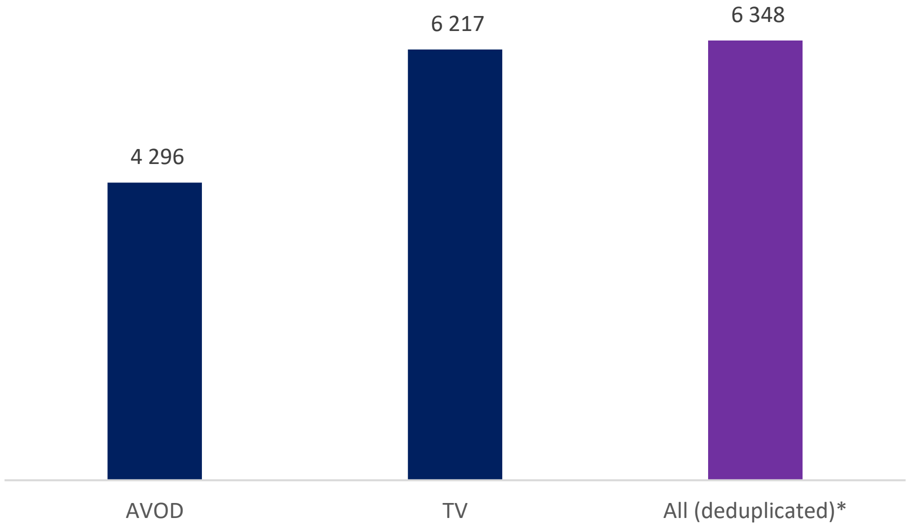
Note: Only films with an IMDb identifier were considered for deduplication; the total number of films available per country is therefore underestimated. Excludes films for which the origin was not available.

Source: European Audiovisual Observatory

Average number of films available for free per country

Among the close to 40 000 films available on average per country, over 6 300 films were available for free (on AVOD or on free TV), including close to 2 000 European films.

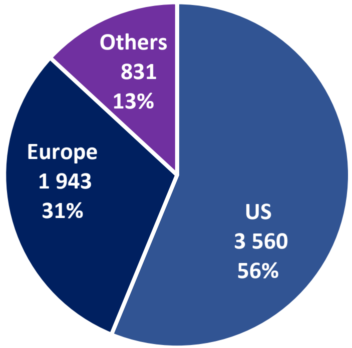
Average number of films available for free per country (2022)



Note: Only films with an IMDb identifier were considered for deduplication; the total number of films available per country is therefore underestimated. Excludes films for which the origin was not available.

Source: European Audiovisual Observatory

Average number of films available for free per country by origin (2022)

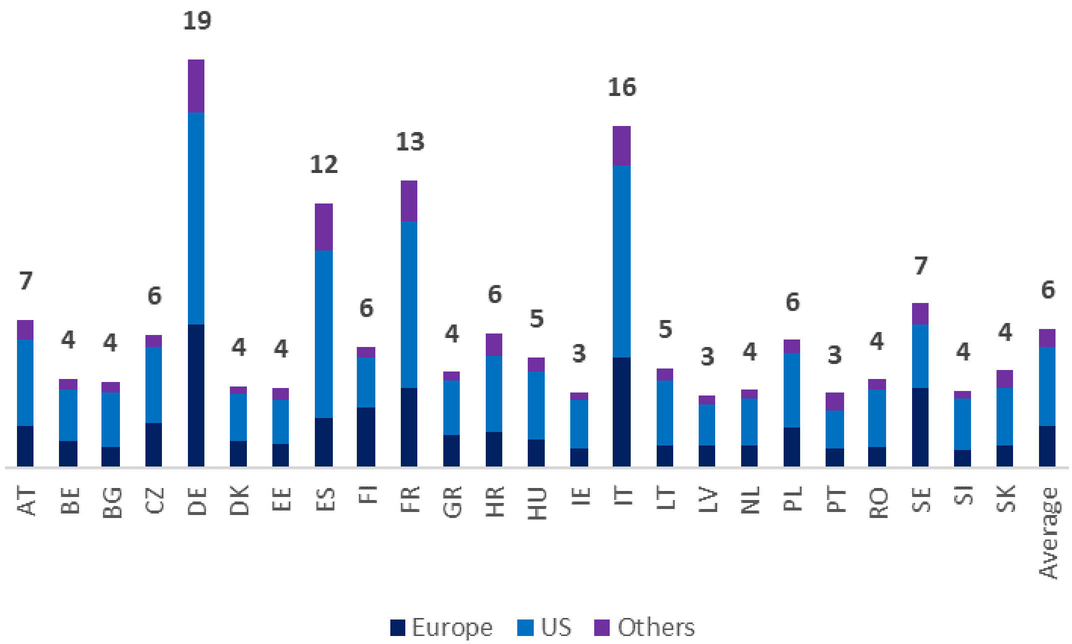


Source: European Audiovisual Observatory

Films available Average number of films available for free per country

The number of films available ranges from over 3 300 to close to 18 000. Please note that the figures by country are impacted by the number of TV channels and VOD services included in the sample for each country.

Average number of films available for free per country (in thousand, 2022)



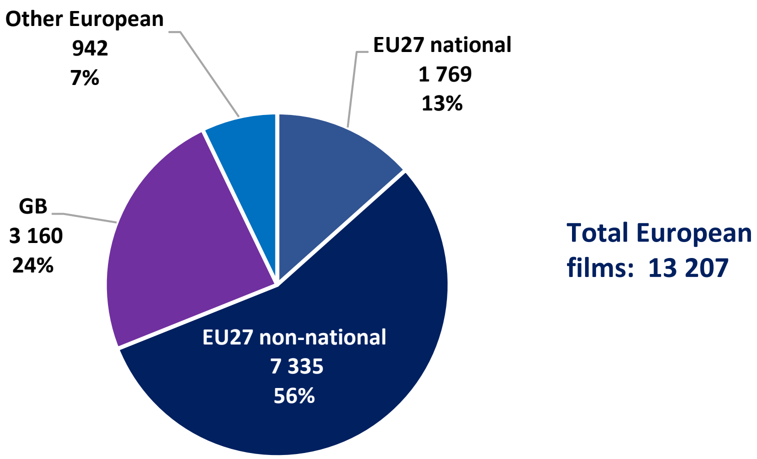
Note: Only films with an IMDb identifier were considered for deduplication; the total number of films available per country is therefore underestimated. Excludes films for which the origin was not available.

Source: European Audiovisual Observatory

EU27 films accounted for 69% of European films available in an EU country and 76% of films available for free.

For both categories, EU27 non-national films accounted for the majority of EU27 films.

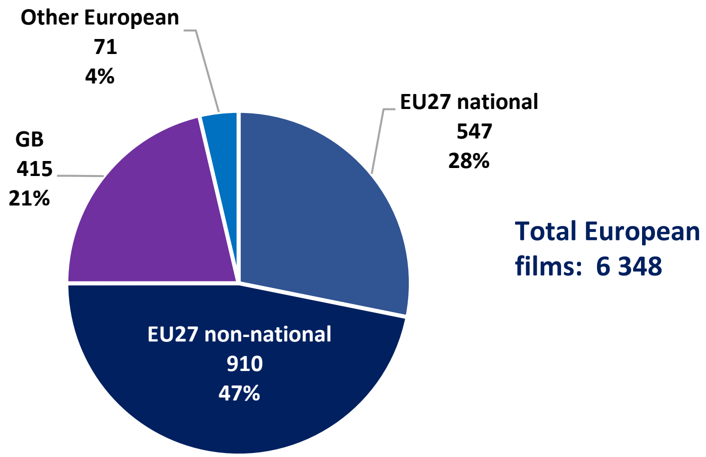
Average number of European films available per country (2022)



Note: Only films with an IMDb identifier were considered for deduplication; the total number of films available per country is therefore underestimated. Excludes films for which the origin was not available.

Source: European Audiovisual Observatory

Average number of European films available for free per country (2022)



Note: Only films with an IMDb identifier were considered for deduplication; the total number of films available per country is therefore underestimated. Excludes films for which the origin was not available.

Source: European Audiovisual Observatory

C. What was the composition of the supply of films?

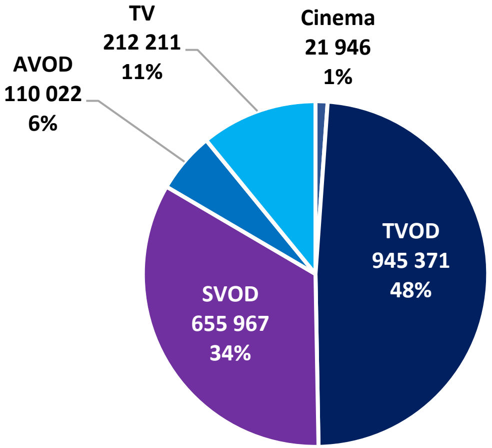
This section follows a supply-side angle. Each presence of a film in cinemas, on a TV channel or on VOD in each country is accounted for.

Film presences by window

The bulk of the supply of films originated from VOD (88%), primarily TVOD (48%). Figures are similar for European films (86% and 45%, respectively).

The share of cinemas is underestimated as 1 presence = 1 country of release, whereas for VOD, 1 presence = 1 catalogue, and for TV, 1 presence = 1 TV channel.

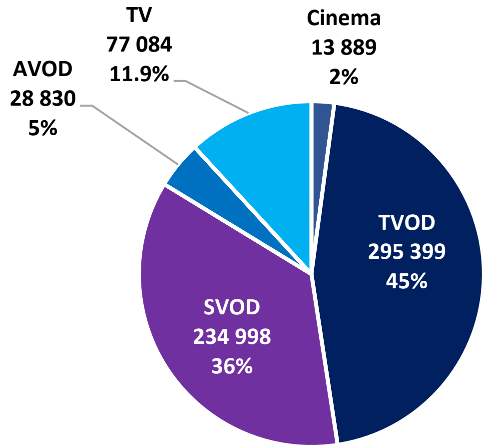
Presences of films by window (2022)



Total film presences: 1 945 517

Source: European Audiovisual Observatory

Presences of European films by window (2022)



Total film presences: 650 000

Source: European Audiovisual Observatory

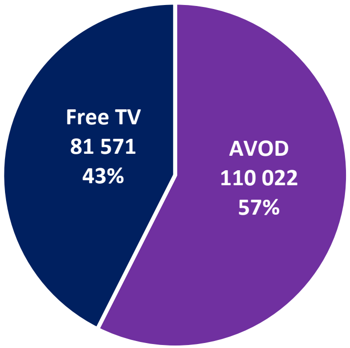
Film presences

Film presences in free windows

About 10% of presences were accounted for by free windows (AVOD and free TV).

Among these films in free windows, AVOD played a more important role for films of all origins, but free TV was more represented for European films.

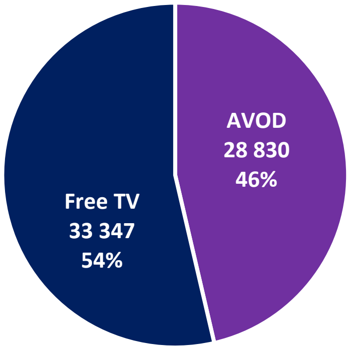
Presences of films by free window (2022)



Total film presences: 191 593

Source: European Audiovisual Observatory

Presences of European films by free window (2022)



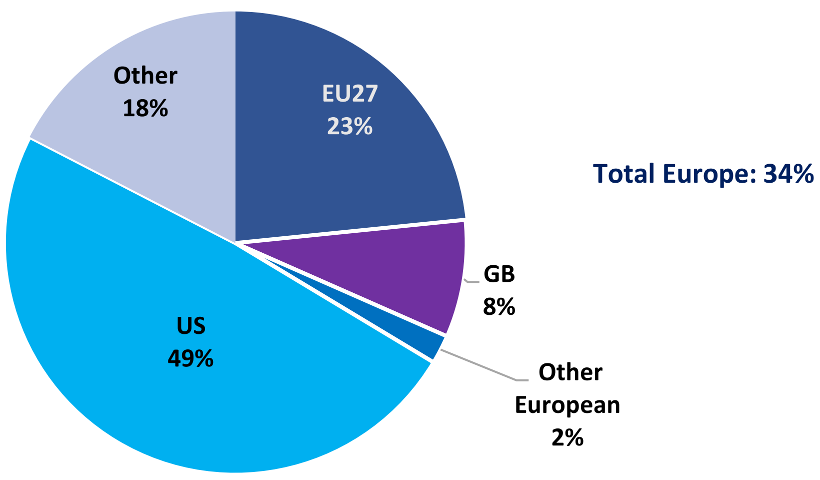
Total film presences: 62 177

Source: European Audiovisual Observatory

Almost 50% of films available in cinema, and on TVOD, SVOD, AVOD or TV are of US origin.

European films account for 34% of presences, including 23% of EU27 films.

Origin of films in cinemas, and on TV, TVOD, SVOD, and AVOD (2022)



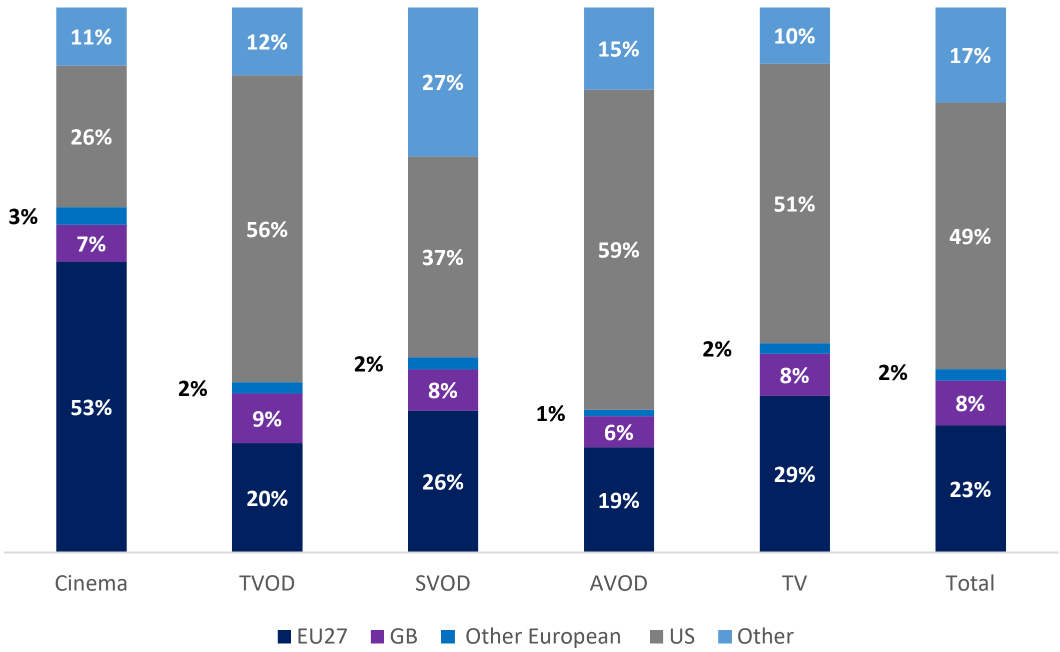
Source: European Audiovisual Observatory

Origin of films by window

Cinema offers the largest share of EU27 and other European films.

The share of EU27 and other European films is slightly higher for SVOD and for TV than for TVOD and AVOD.

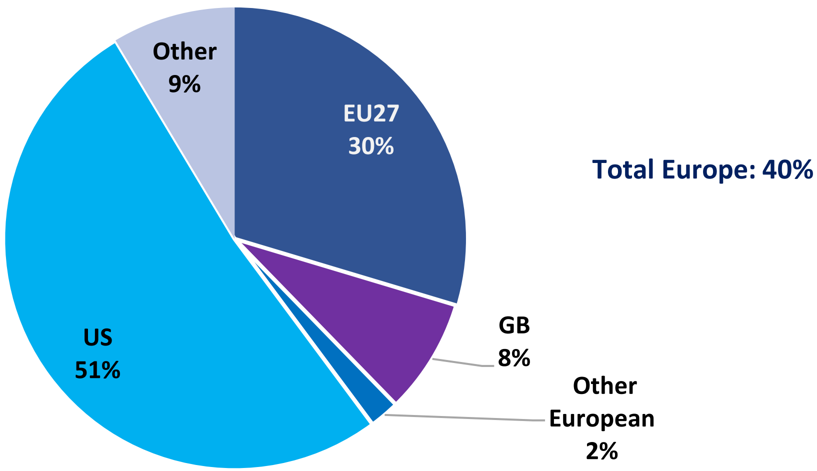
Origin of films in cinemas, and on TV, TVOD, SVOD, and AVOD by window (2022)



Source: European Audiovisual Observatory

The EU27 share is significantly higher (30% vs. 23% for all films) when focusing on films theatrically released in the EU, driving the share of all European films to 40%. This is mainly due to the comparatively low share of non-US and non-European films available on VOD and released in cinemas in Europe.

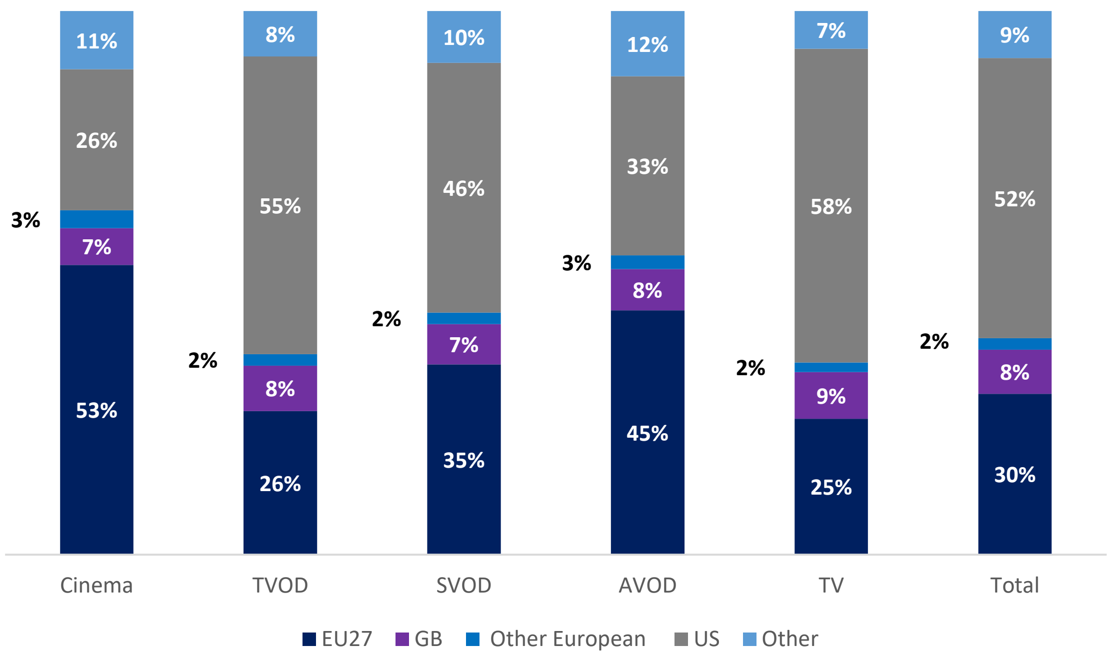
Origin of theatrical films in cinemas, and on TVOD, SVOD, AVOD (2022)



Source: European Audiovisual Observatory

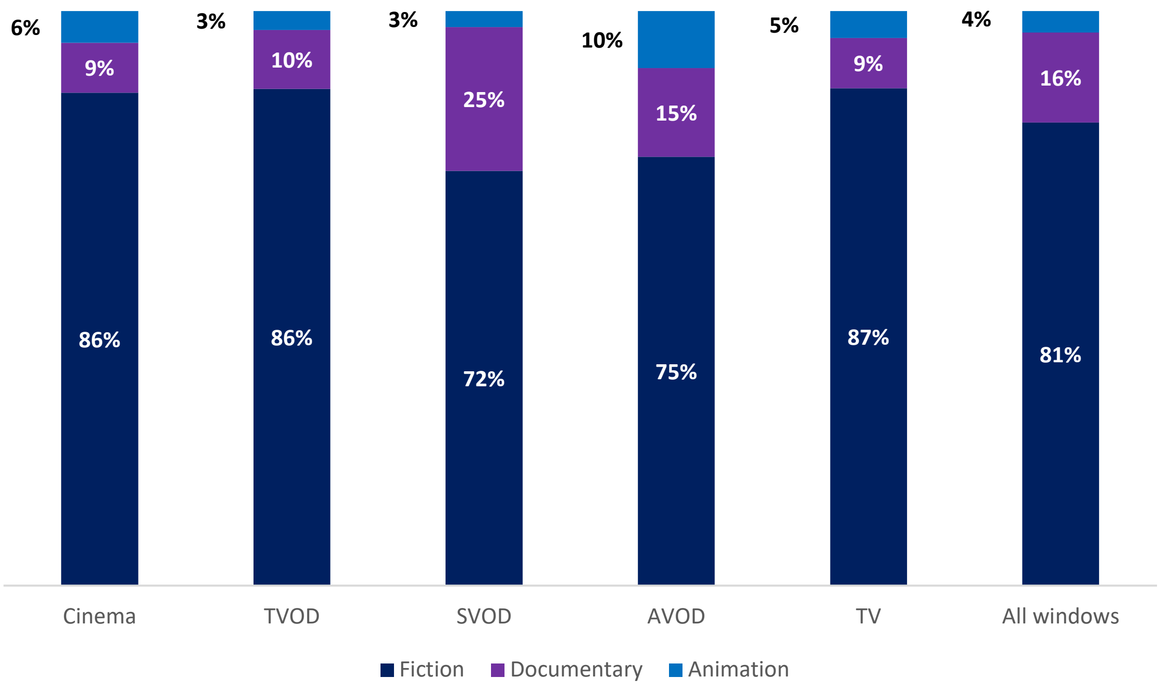
All VOD windows (and especially AVOD) reach a higher share of EU27 films when the focus is on films theatrically released in Europe, whereas the share of EU27 films among films theatrically released in Europe vs. all films is slightly lower for those on television, as TV channels broadcast a significant number of made-for-TV films.

Origin of theatrical films in cinemas, and on TV, TVOD, SVOD, and AVOD by window (2022)



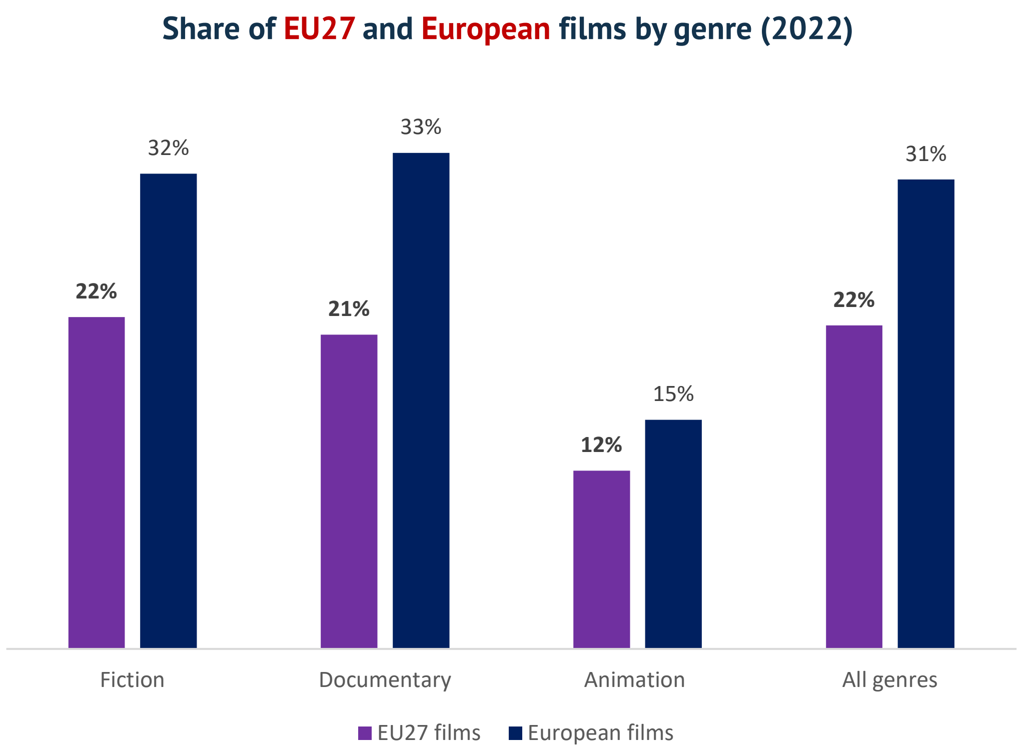
The vast majority (81%) of films on offer are fiction films. Documentary films are more present on SVOD and animation films on AVOD, as several VOD catalogues in the sample are niche VOD services, focused on documentaries or animation.

Breakdown by genre and by window of films available in cinemas, and on TV, TVOD, SVOD, and AVOD (2022)



Source: European Audiovisual Observatory

The share of EU27 and European films is significantly lower for animation films.



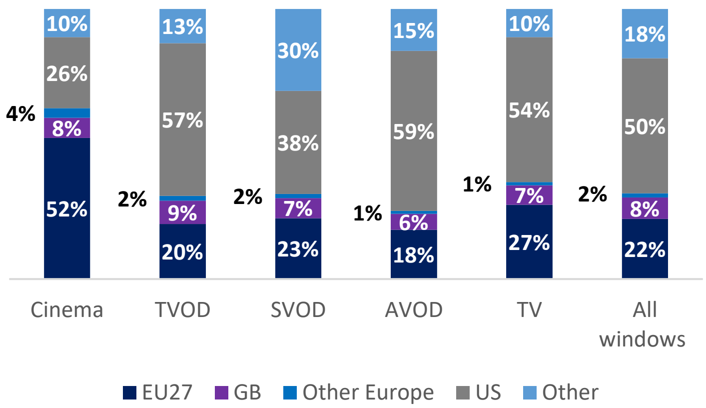
The total for all genres varies slightly from the previous slides as only films with an identified genre are taken into account

Source: European Audiovisual Observatory

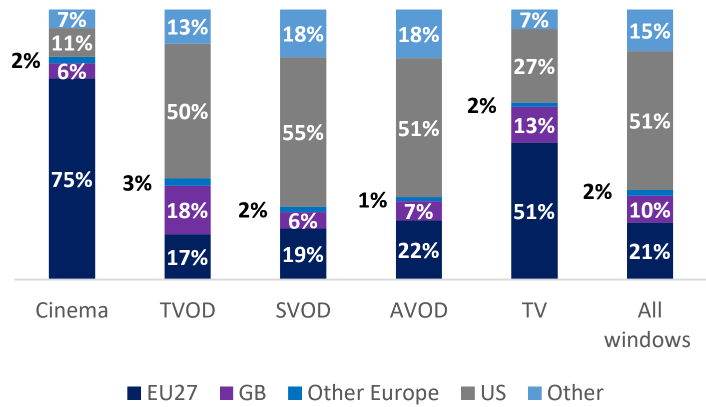
Supply of films by genre

Compared to other windows, cinemas dedicate more space to EU27 films, whatever the genre. TV over-represents EU27 documentaries and animated films.

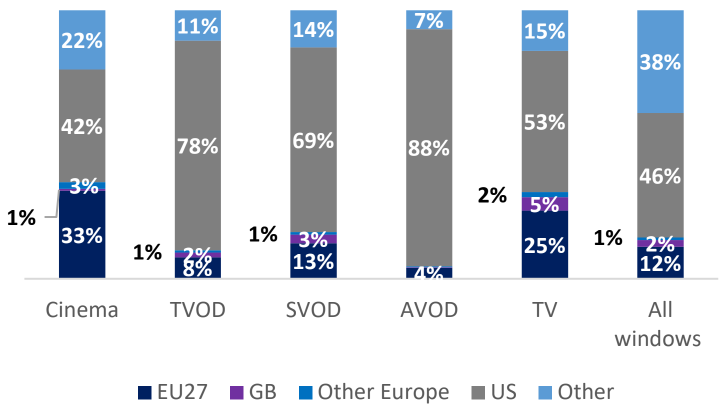
Share by origin and window of fiction films (2022)



Share by origin and window of documentary films (2022)



Share by origin and window of animation films (2022)

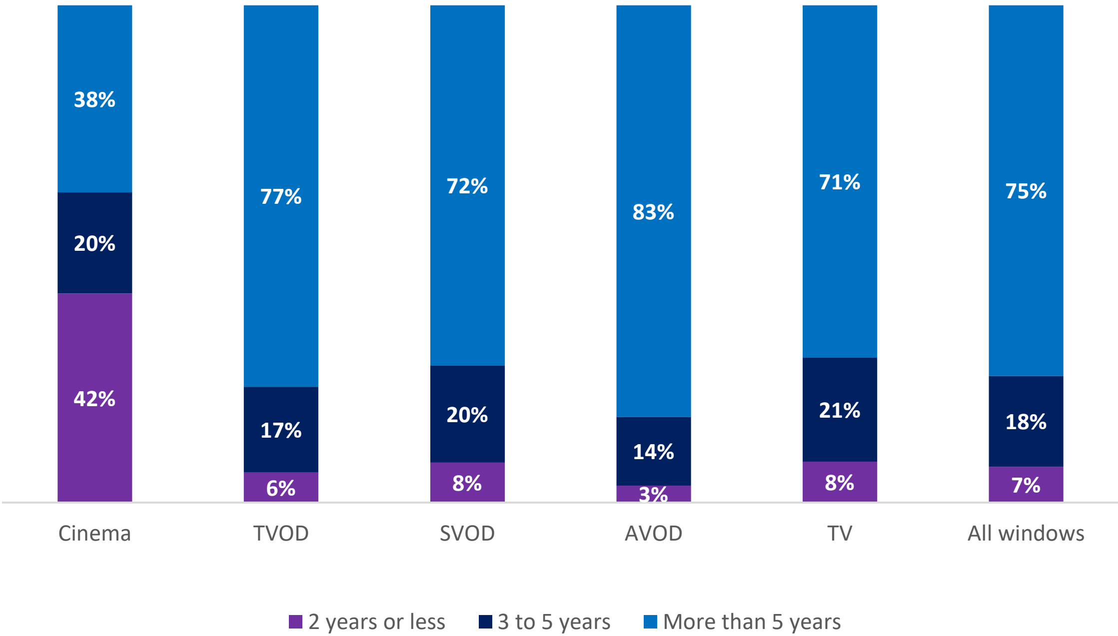


Source: European Audiovisual Observatory

Whereas cinemas, by definition, offer the most recent films, they also give significant space to rereleases of older films.

The vast majority of VOD catalogues and of TV broadcasts are made up of films aged more than five years.

Age of films available in cinemas, on VOD and on TV (2022)



Source: European Audiovisual Observatory

D. What were the share of national, EU 27 non-national and other European films in the supply of European films?

This section further analyses the supply of films by focusing on <u>the origin of European films</u>. Each presence of a film in cinemas, on a TV channel or on VOD in each country is accounted for.

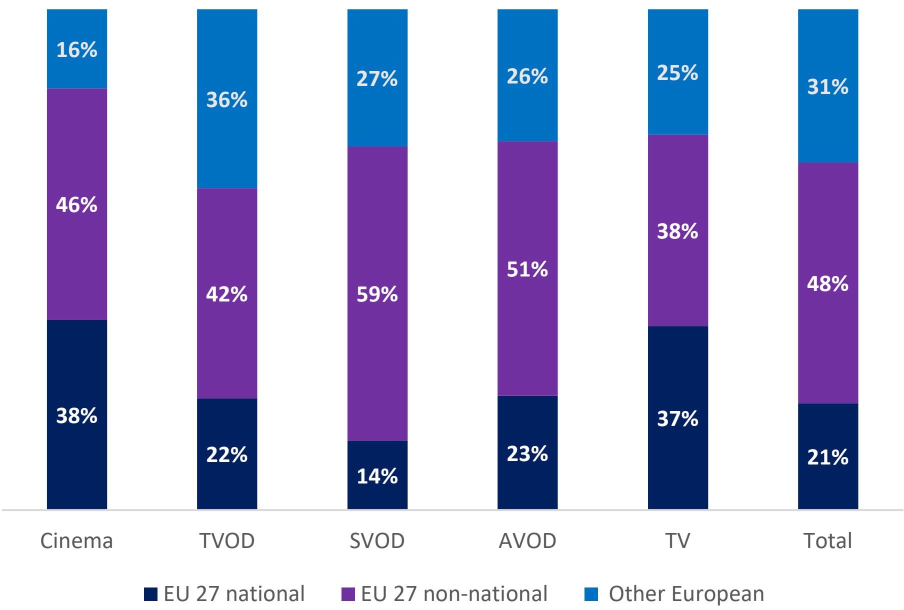
European Audiovisual Observatory

The majority of European films available are EU27 non-national films, with a comparatively higher share in SVOD, for which national films are under-represented. This is the result of the leading SVOD pan-European catalogues, largely made of European works available in all countries.

Cinema and television dedicate comparatively more space to national works.

The average share of non-EU27 films is slightly over 30%. Among these non-EU27 films, the United Kingdom roughly accounts for 80%.

Breakdown of European films available in cinemas, and on TV, TVOD, SVOD, and AVOD, by national vs. EU27 non-national vs. Other European (2022)



Source: European Audiovisual Observatory

The graph on next page (page 41) compares for each country:

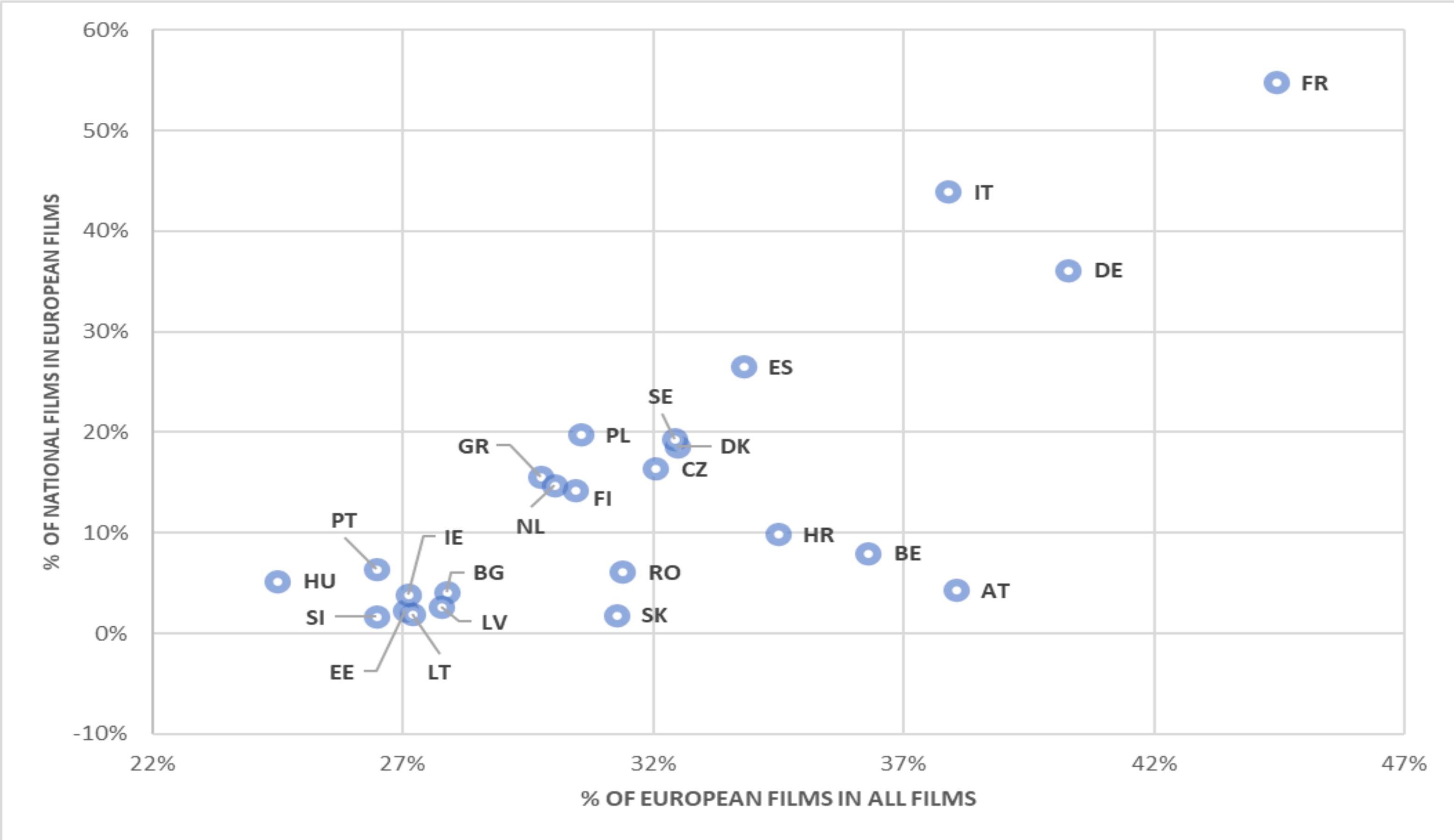
- On the one hand, the share of European films among all films.
- On the other hand, the share of national films among European films.

The graph roughly shows a correlation between the two variables: the overall share of European works depends on the share of national works:

- High-producing countries (e.g. France, Germany, Italy) achieve a higher share of European films thanks to their national films.
- A second group of intermediate countries comprises Spain, Denmark, Sweden, Czechia, Poland, Finland, the Netherlands and Greece.
- Smaller countries draw significantly on non-national works, but not to the extent to achieve similar share of European films than high-producing countries, probably due to limits to importing national content in another country.
- But smaller countries neighbouring another country sharing the same language are more likely to compensate with a low level of production by non-national films (e.g. Austria, Belgium).

Source: European Audiovisual Observatory

Mapping of EU27 countries by share of European films in all films and share of national films in European films (2022)



Source: European Audiovisual Observatory

Going deeper in the origin of non-national films, the graph on next page (page 43) compares for each country:

- On the one hand, the share of national films among European films.
- On the other hand, the share of EU non-national films among all non-national European films (i.e. the market share of EU fims among all non-national European films).

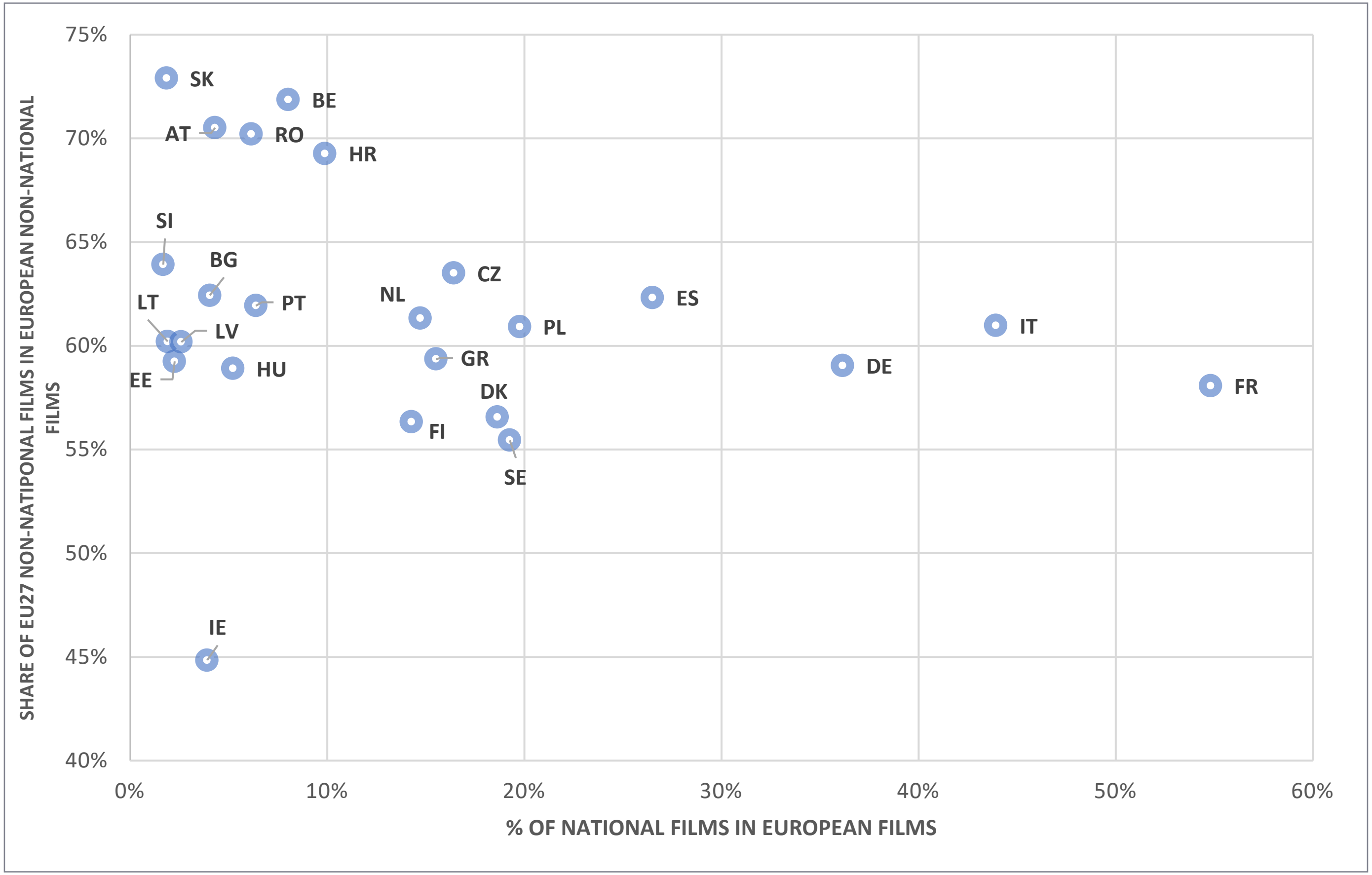
The graph shows that a majority of countries have a similar mix of EU and non-EU films as regards non-national European films. But some specificities appear:

- Some smaller countries favour EU27 non-national works: Austria, Belgium and Slovakia (benefitting from a common language with Germany, with France and the Netherlands and with Czechia, respectively), Romania (with a significant inflow of films from France) and Croatia (with a strong inflow of films from Spain).
- Ireland represents a special case of its own, as the common language with the United Kingdom translates in a higher than on average share of non-EU European works.
- Sweden, Denmark and Finland rely more than on average on non-EU European works, part of the explanation deriving in the proximity with Norway.

Source: European Audiovisual Observatory

Domestic, EU27 non-national and other European films

Mapping of EU27 countries by share of national films in European films and share of EU27 non-national films in all European non-national films (2022)



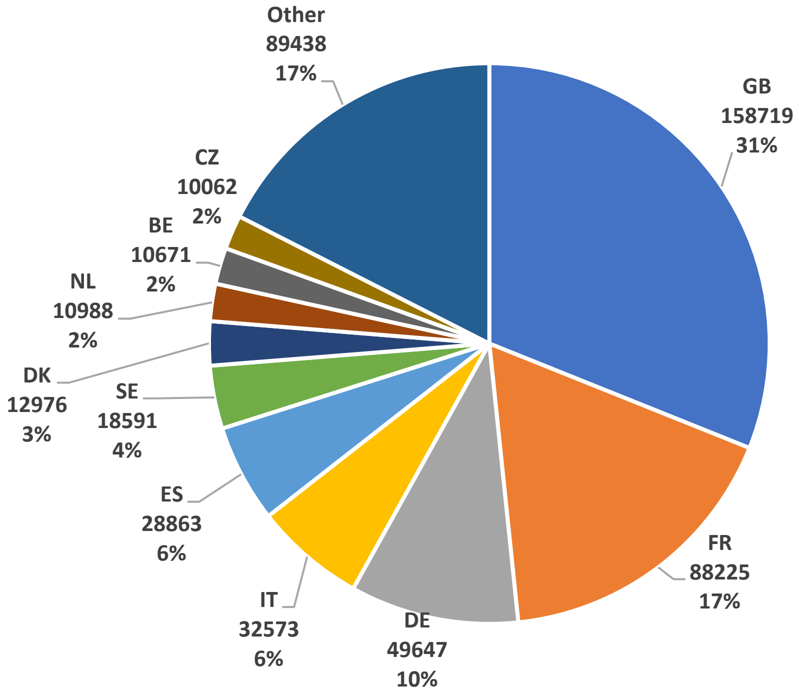
Source: European Audiovisual Observatory

E. Who were the main exporters of European films in and to the EU 27?

This section further analyses the supply of films by focusing on the origin of non-national European films, i.e. the exporters of European film in and to the EU 27. Each presence of a non-domestic European film in cinemas, on a TV channel or on VOD in each country is accounted for.

The UK is by far the main exporter of European films in the EU27. The four other top 5 film-producing countries follow at a distance.

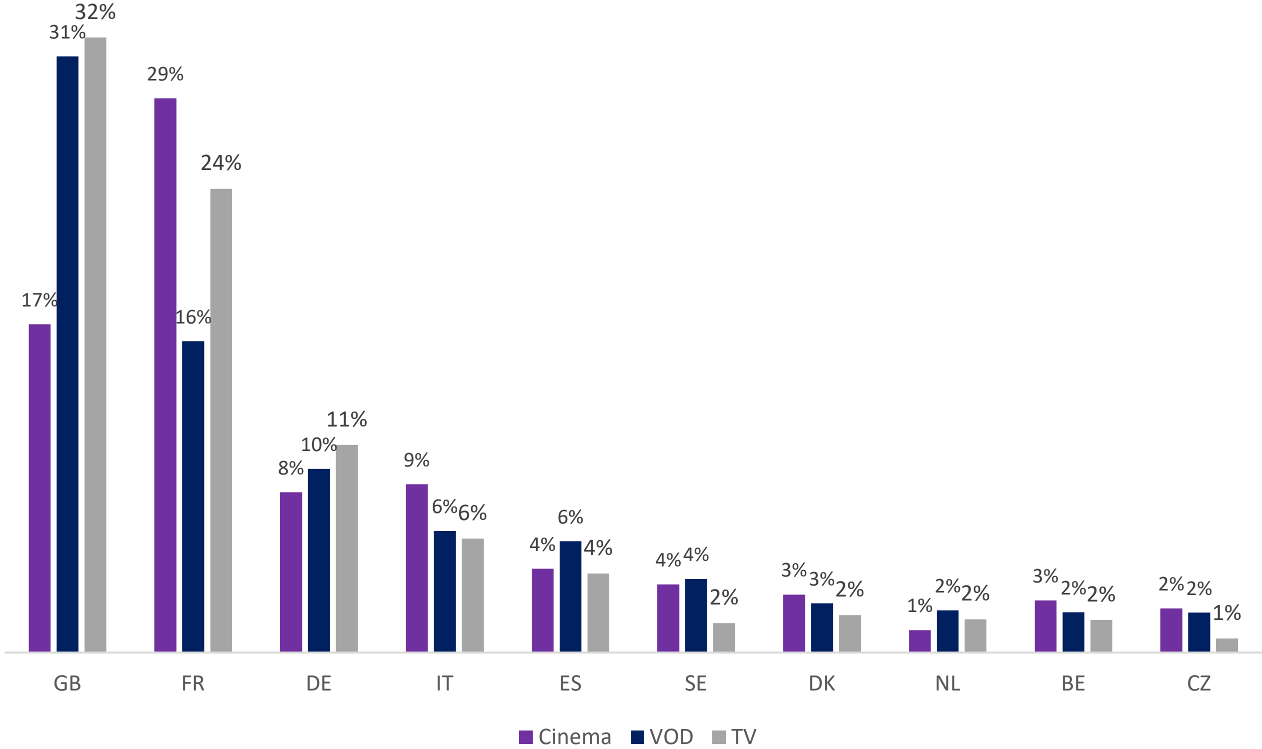
Main exporters of European films in cinemas, on VOD and on TV (share of total film exports, 2022)



Source: European Audiovisual Observatory

The leading position of the UK in the export of European films is driven by VOD and TV. France is the primary exporter of films in cinemas, but performs less well on VOD. Spain has taken advantage of VOD to increase its share of exports when compared with cinema and TV.

Share of exports for the main exporters of European films by window (2022)



Source: European Audiovisual Observatory

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