

# The impact of cinema admissions on SVOD usage

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# Introduction and methodology

The aim of this report is to understand the relationships between subscription video-on-demand (SVOD) consumption and cinema admissions by looking at nine EU countries (Denmark, Finland, France, Germany, Italy, Netherlands, Poland, Spain, Sweden).

The report addresses the following research questions:

- How do the consumption patterns of films in cinemas and on SVOD compare in terms of origin of films and concentration?
- How do the top 100 films in cinemas since 1996 perform on SVOD?
- Does a national theatrical release impact SVOD viewing on the same country?
- Do theatrical films with no release in a country still perform better than other films on SVOD in that country?
- Is there a correlation between cinema admissions in a country and SVOD view time in the same country?

# Introduction and methodology

- **Source of the data:**
  - The SVOD data were provided by Goldmedia ([vod-ratings](#) service) from 39 service providers, representing 91 SVOD country catalogues in 9 EU countries.
  - The cinema admissions data were extracted from the Observatory LUMIERE database.
- **Time period of the data:**
  - The retained time frame for SVOD is from 1 September, 2022 to 1 September, 2023.
  - The retained time frame for cinema admissions is:
    - For the Part 1 (comparison between cinema admissions and SVOD consumption) from 1 January, 2022 to 31 December, 2022.
    - For the Part 2 (correlation between cinema admissions and SVOD consumption) from 1996 to 2023.
- **Indicators:**
  - SVOD consumption is calculated in view time.
  - Cinema consumption is calculated in admissions.
- **Origin of works**
  - Only the first production country of a work is considered when identifying its region of origin.
  - The regions of origin for works are:
    - EU27 (member states of the European Union) split into
      - EU national
      - EU non-national
    - GB (works which have as first production country the United Kingdom)
    - Other European countries (all other member states of the [Council of Europe](#))
    - USA
    - Other international (all other countries)

Please quote this report as “*The impact of cinema admissions on SVOD usage?*”, European Audiovisual Observatory.

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- The analysis is based on a limited selection of works.

Number of titles included in SVOD view time data  
Sept. 2022 – Sept. 2023, by country

Country	Film
DE	4 459
DK	1 564
ES	2 569
FI	1 228
FR	2 441
IT	2 611
NL	2 264
PL	2 281
SE	2 444
<b>Grand Total</b>	<b>21 861</b>

Source: OBS based on Goldmedia data

Number of titles included in cinema admission data  
Jan. 2022 – Dec. 2022, by country

Country	Film
DE	2 012
DK	179
ES	2 048
FI	424
FR	2 579
IT	1 653
NL	1 135
PL	158
SE	510
<b>Grand Total</b>	<b>10 698</b>

Source: LUMIERE

Only 8 916 titles were available in both cinemas and on SVOD in the same country.

- The SVOD viewing data was gathered through surveys in most countries (except Germany), which limits the quality and the exhaustivity of the sample.

# Main findings

# Main findings

## □ HOW DO THE CONSUMPTION PATTERNS OF FILMS IN CINEMAS AND ON SVOD COMPARE?

- **Films produced in the EU get a higher share of cinema admissions (28%) than their share of SVOD consumption (22%).** Among EU films, the drop is due to EU national films, whereas EU non-national films tend to perform better on SVOD than in cinemas. Other reports from the Observatory suggest that the offer of films on SVOD is significantly driven by non-national films; therefore, the comparatively better performance of EU non-national films could reflect the composition of SVOD catalogues.
- **There are strong variations between countries as regards the gap between the market share of EU films in cinemas and on VOD:** the gap is especially high in France and Denmark, and, to a lesser extent in the Netherlands, Finland and Germany. Conversely, EU films get about the same share of cinema viewing and SVOD viewing in Sweden, Poland and Spain. EU films even get a higher share of SVOD viewing than of cinema admissions in Italy.
- **Films rely much more on their national markets in cinemas (84% of admissions) than on SVOD (62% of viewing).** Other reports from the Observatory show that, on average, EU films are released in a larger number of countries on SVOD than in cinemas. This translates in more viewing in non-domestic market. This observation applies to all countries in the sample, except Germany, where the share of non-domestic cinema admissions and of SVOD viewing is similar.
- **Whatever the origin of the films, SVOD film viewing is far less concentrated than cinema film admissions.** This results probably from the much larger number of films on offer on SVOD.
- **But EU films viewing on SVOD is more concentrated than for films of other origin:** while the admissions to EU films in cinemas is less concentrated than to films of all origins (reflecting to some extent the importance of European mid-tier films in cinemas), viewing of EU films on SVOD is more concentrated than for films of all origins. This suggests that a limited number of EU films become successful on SVOD. This observation applies to all countries in the sample.

## □ HOW DO THE TOP FILMS IN CINEMAS SINCE 1996 PERFORM ON SVOD?

- **Outstanding performance in cinemas does not translate mechanically into outstanding performances on SVOD:**
  - **Most of the top 100 titles by cinema admissions since 1996 are available on SVOD.** However, less than 20% of them are among the top 100 most viewed films on SVOD. The most successful films in cinemas remain in exploitation on SVOD but a cinema blockbuster is not necessarily a SVOD blockbuster.
  - **EU top blockbusters since 1996 are even less likely to reach the list of most viewed EU films on SVOD:** less EU films are available on SVOD, and when available, they hardly make it to the top 20.
  - **EU best-selling films with primarily national admissions perform better on SVOD.** Conversely, the top EU films in cinema by non-national admissions are less likely to be among the most seen on SVOD.

# Main findings

## ❑ DOES A THEATRICAL RELEASE IMPACT SVOD VIEWING?

- **Films theatrically released in a country overperform in terms of SVOD viewing.** For all the countries in the sample, films theatrically released account for 46% of films on SVOD but 57% of film view time. The “premium” for films released in cinemas is especially high in Sweden and Denmark.
- **Films released in cinemas but not in the country of the SVOD service will also slightly perform better than non-theatrical films.**

## ❑ IS THERE A CORRELATION BETWEEN CINEMA ADMISSIONS IN A COUNTRY AND SVOD VIEW TIME IN THE SAME COUNTRY?

- **60% of films performed similarly in cinemas and on SVOD**, i.e. either performed under the median both in cinemas and on SVOD, or above the median both in cinemas on SVOD. The result is similar for EU films (58%). The results are roughly similar in the different countries in the sample.
- **Conversely, only a limited number of films get better results on SVOD than on cinemas:** 20% of films of all origin (and 21% of EU films) perform under the median in cinemas but over the median on SVOD.
- **There are nuances between type of films:** recent films, especially EU films, are more likely to overperform on SVOD even if they underperformed in cinemas.



## Part A

# How do the consumption patterns of films in cinemas and on SVOD compare?

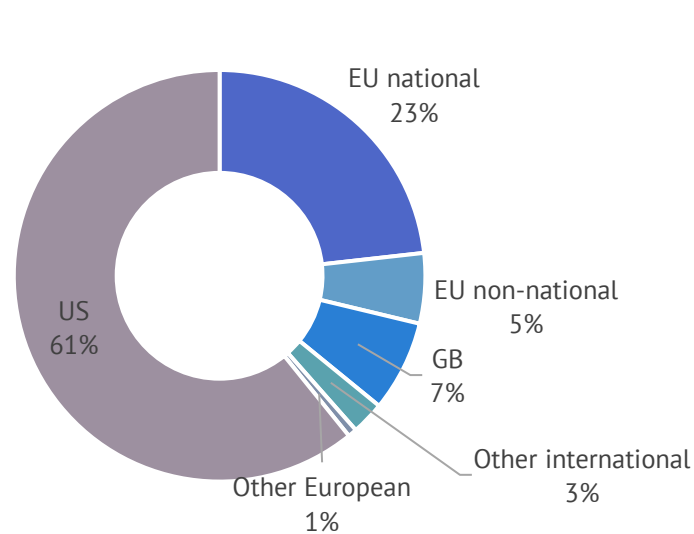
- In this section, we compare the structure of film consumption in cinemas and on SVOD in terms of origin of films and concentration

### Sample

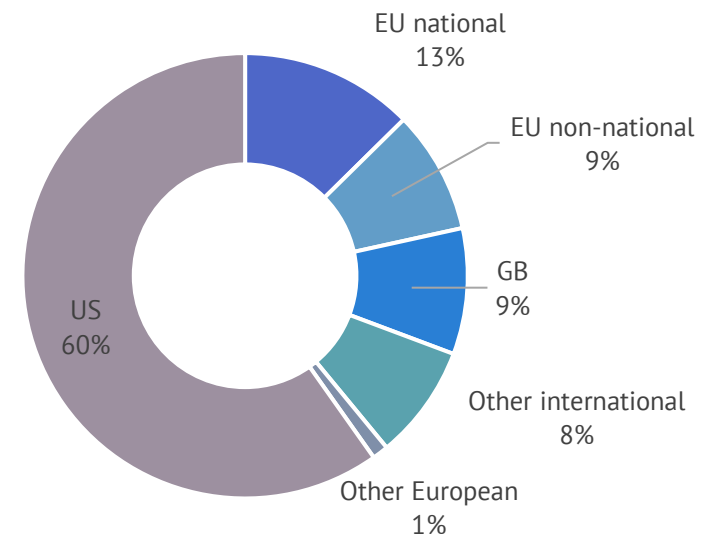
Cinema admissions: January 2022 - December 2022  
SVOD view time: September 2022 – September 2023

# Higher market share for EU non-national titles on SVOD than in cinemas

- EU27 titles (EU national + EU non-national) have a smaller share of view time on SVOD compared to the share of EU27 admissions (22% vs 29%).
- US titles have a similar share of view time on SVOD compared to the share of US admissions (60% vs 61%).
- Other international films have a higher share of consumption on SVOD compared to theatrical admissions (8% vs 2%).
- Looking at the details for the EU27, national films have a smaller share of consumption on SVOD than in cinemas (13% vs 23%).
- However, EU non-national titles have a higher share of consumption on SVOD than in cinemas (9% vs 5%).



CINEMA - Split of admissions by origin  
*In % of total admissions, EU9*

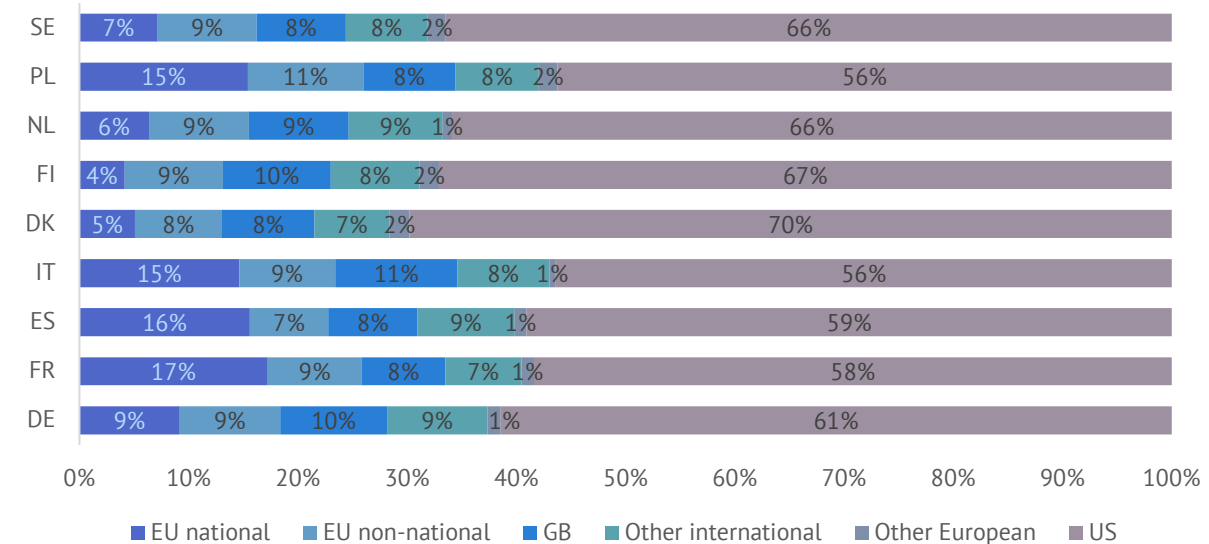
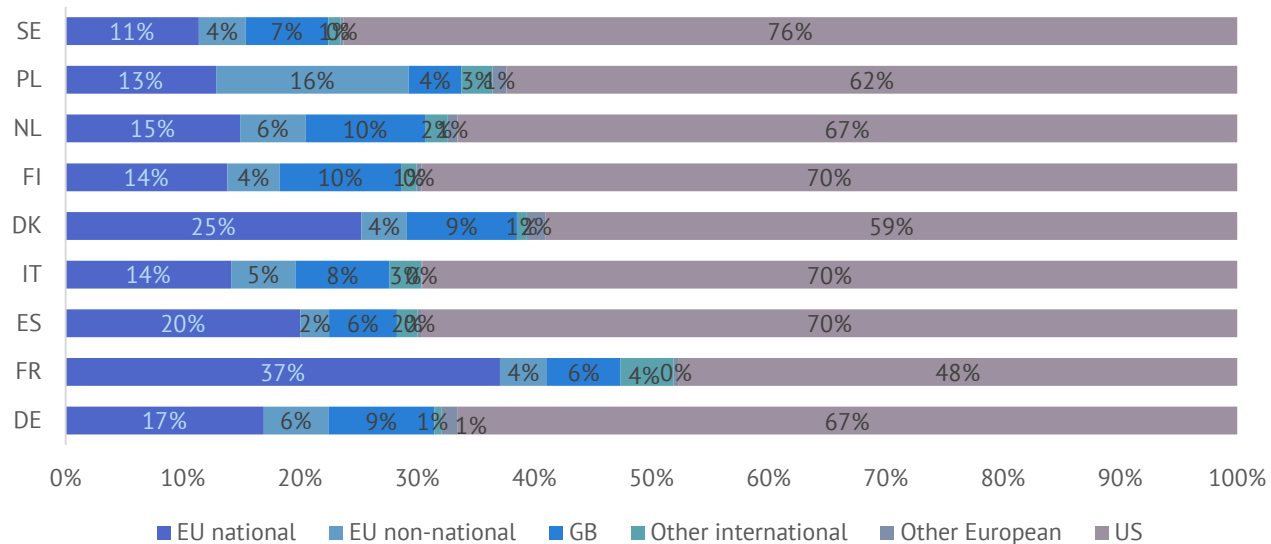


SVOD - Split of view time by origin  
*In % of total view time in hours, EU9*

Source: European Audiovisual Observatory analysis of Goldmedia and LUMIERE data

# EU national titles account for a higher share in cinemas than on SVOD

- France has the lowest share of admissions for US titles (48%) but is one of the few countries where the share of US titles is higher on SVOD than in cinemas.
- In Denmark the share of national films drops the most from cinema admissions to SVOD (by 20%).
- In Poland and Italy, the share of consumption of national titles is higher on SVOD than in cinemas.



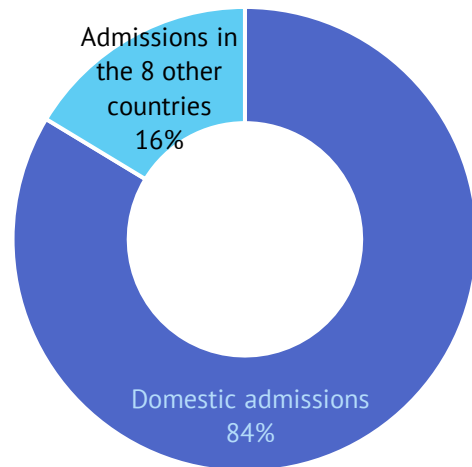
CINEMA - Split of admissions by origin and by country  
In % of total admissions, EU9

SVOD - Split of view time by origin and by country  
In % of total view time in hours, EU9

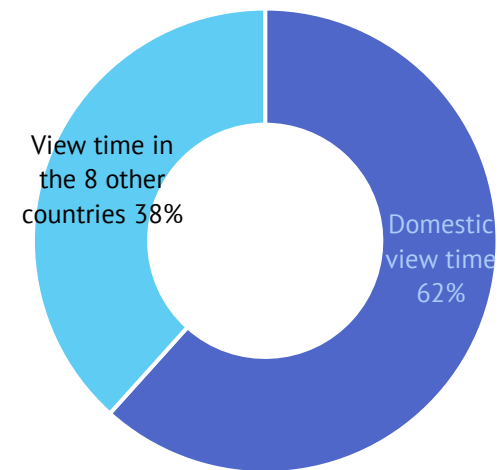
Source: European Audiovisual Observatory analysis of Goldmedia and LUMIERE data

## The national market is proportionally more important for cinemas than for SVOD for titles produced in the countries of the sample

- Films produced in the countries of the sample generated the lion's share of their admissions in cinemas in their national market (84%) and only 16% in the eight other countries.
- Films produced in the countries of the sample received only 62% of view time in the domestic market on SVOD and 38% in the eight other countries.



CINEMA - Split of admissions by market  
*In % of total admissions, EU9*

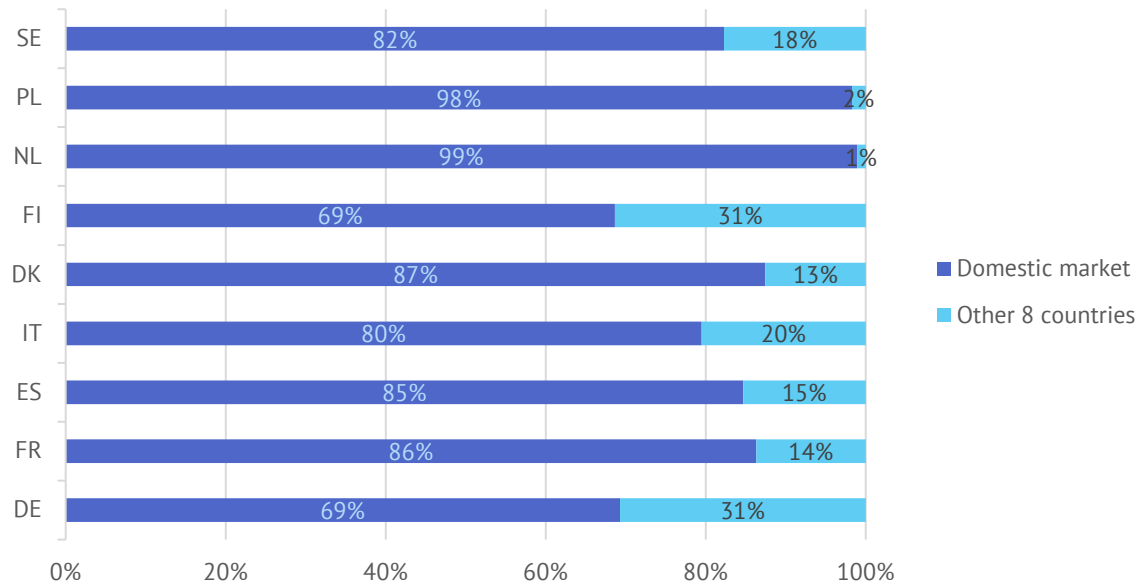


SVOD - Split of view time by market  
*In % of total view time in hours, EU9*

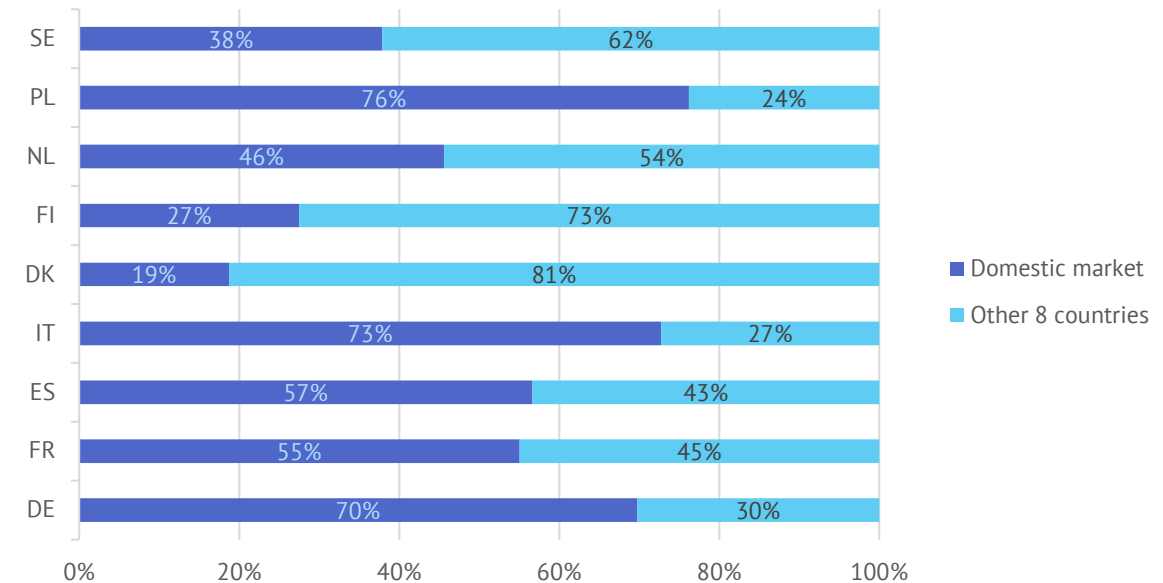
Source: European Audiovisual Observatory analysis of Goldmedia and LUMIERE data

# The consumption of national films is quite different among EU9 in terms of cinemas and of SVOD

- Except for Germany, titles are consumed more in the country of production in cinemas compared to SVOD.
- Dutch and Polish titles are almost exclusively consumed in the national market in cinemas (99% in both countries).
- Danish, Swedish, Finnish and Dutch titles generate more view time outside of their national markets.



CINEMA - Split of admissions by market and by country  
*In % of total admissions, EU9 titles*

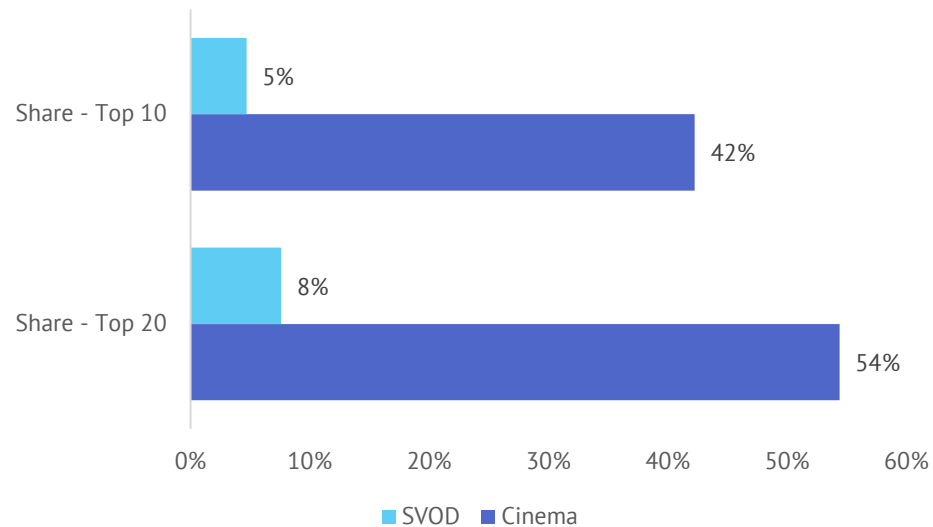


SVOD - Split of view time by market and by country  
*In % of total view time, EU9 titles*

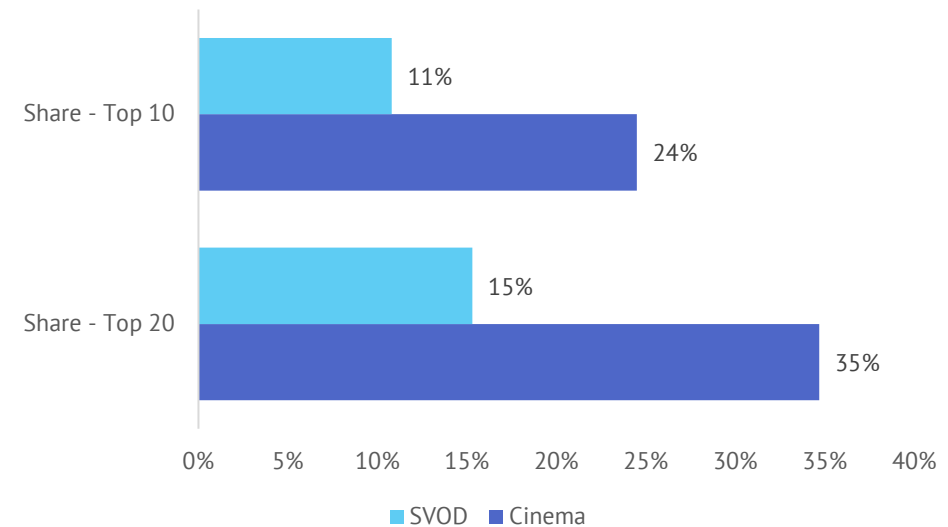
Source: European Audiovisual Observatory analysis of Goldmedia and LUMIERE data

# Film consumption less concentrated on SVOD

- Consumption is far less concentrated on SVOD than in cinemas.
- When it comes to EU27 films, the concentration is higher on SVOD and lower in cinemas compared to films of all origins.



ALL-ORIGIN TITLES - Market share comparison of top 10 and top 20 in cinemas and on SVOD  
*In % of total admissions and % of view time, films released in 1996 or later, all origins, EU9*

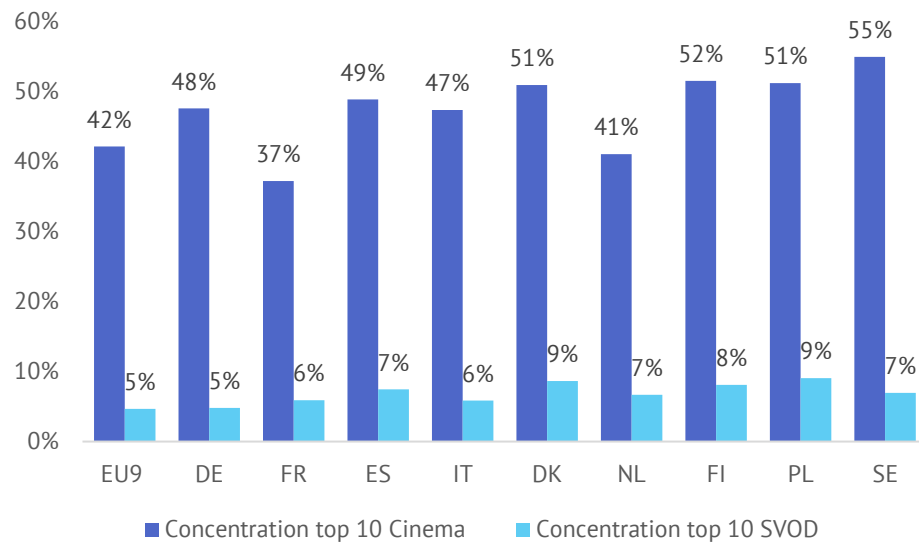


EU27 TITLES - Market share comparison of top 10 and top 20 in cinemas and on SVOD  
*In % of total admissions and % of view time, films released in 1996 or later, EU27 films, EU9*

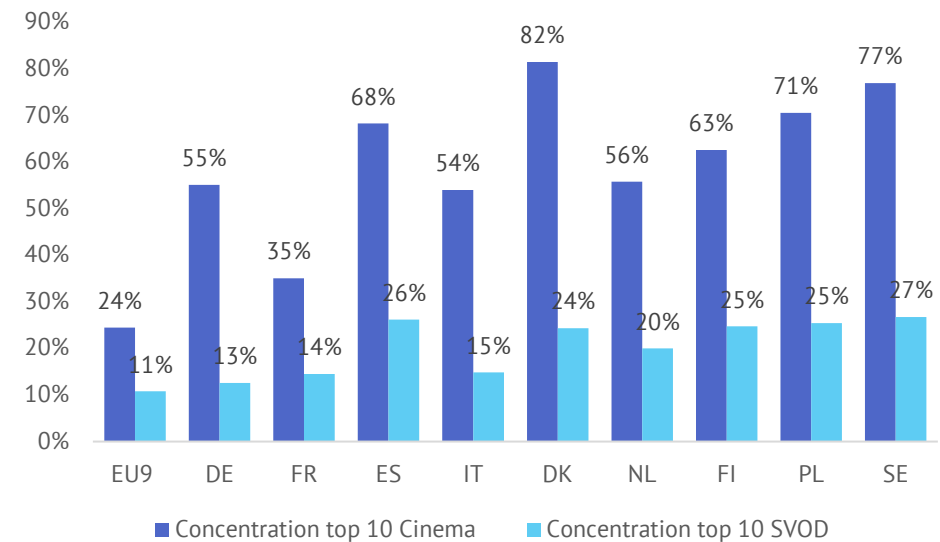
Source: European Audiovisual Observatory analysis of Goldmedia and LUMIERE data

# Film consumption less concentrated on SVOD

- Germany had the lowest concentration in SVOD consumption for all films and EU27 films.
- France has the lowest concentration for all films and EU27 films.
- Sweden has the highest concentration for all-origin titles in terms of cinema admissions and the highest concentration for EU27 titles in terms of view time.
- Denmark has the highest concentration for EU27 film admissions.



**ALL-ORIGIN TITLES - Market share comparison of top 10 and top 20 in cinemas and on SVOD**  
*In % of total admissions and % of view time, films released in 1996 or later, all origins, all countries*



**EU27 TITLES - Market share comparison of top 10 and top 20 in cinemas and on SVOD**  
*In % of total admissions and % of view time, films released in 1996 or later, EU27 films, all countries*

Source: European Audiovisual Observatory analysis of Goldmedia and LUMIERE data

## Part B

**Do cinema releases and admissions impact SVOD viewing?**



## B.1 How do the top 100 films in cinemas since 1996 perform on SVOD?

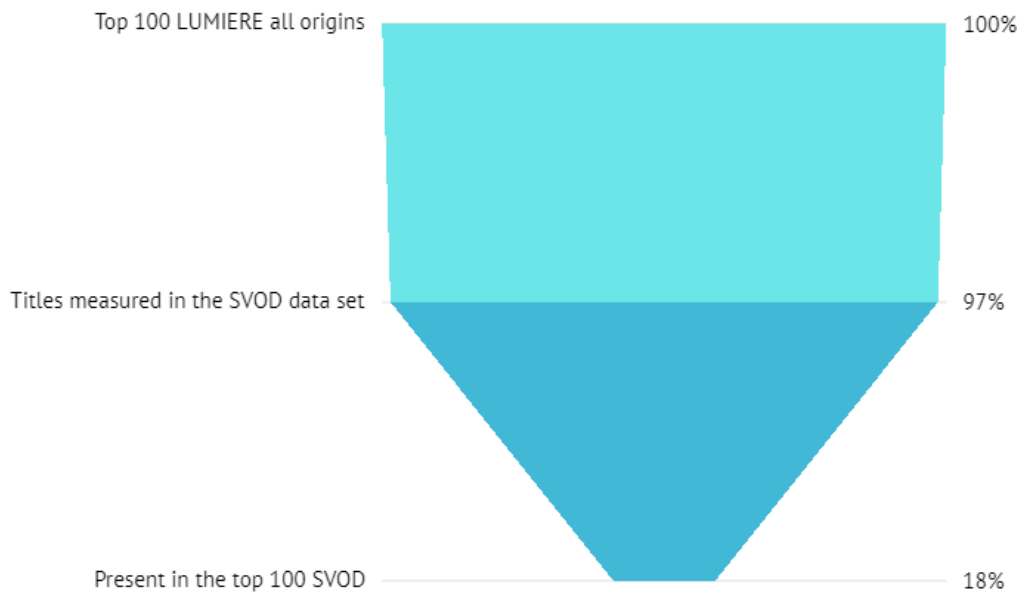
- In this section, we analyse whether the top 100 films and the top 100 EU films by admissions since 1996 are among the most watched films on SVOD.

### Sample

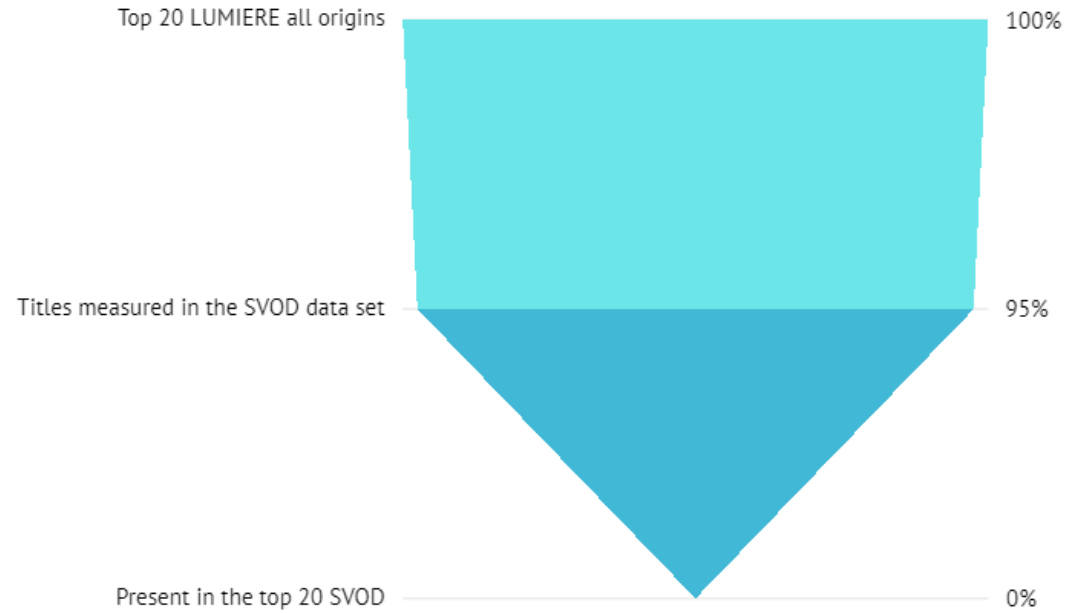
Cinema admissions: 1996 - 2022  
SVOD view time: September 2022 – September 2023

# Although widely available, less than 20% of the top 100 theatrical films since 1996 are in the top 100 most watched films on SVOD

Almost all titles from the top 100 admissions are in the SVOD data set but only a minority (18%) makes it to the top 100 SVOD and no titles from the top 20 LUMIERE makes it to the top 20 SVOD.



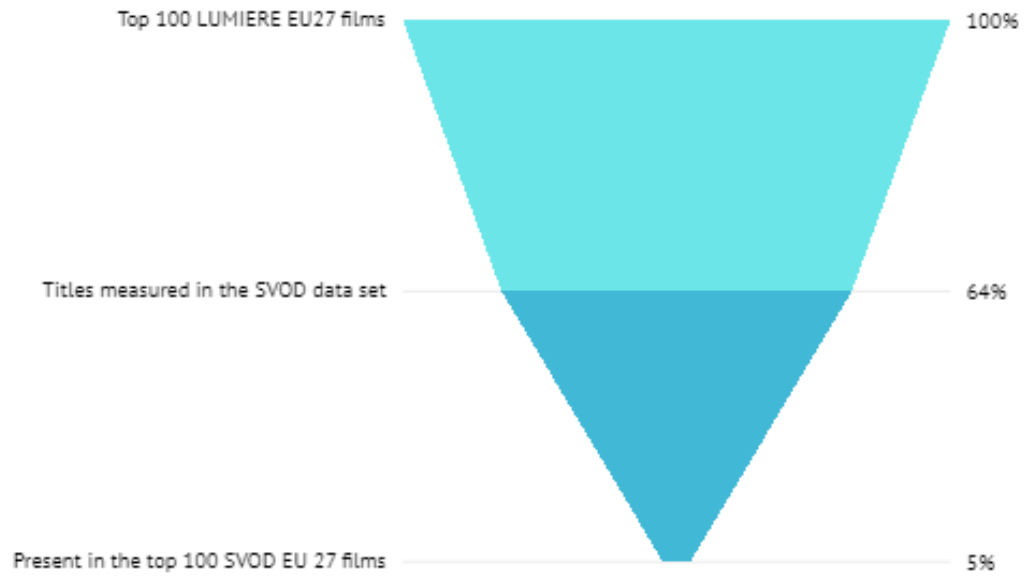
TOP 100 LUMIERE admissions since 1996 – Share of titles measured in SVOD and present in the top 100  
*In % of titles, EU9, all origins*



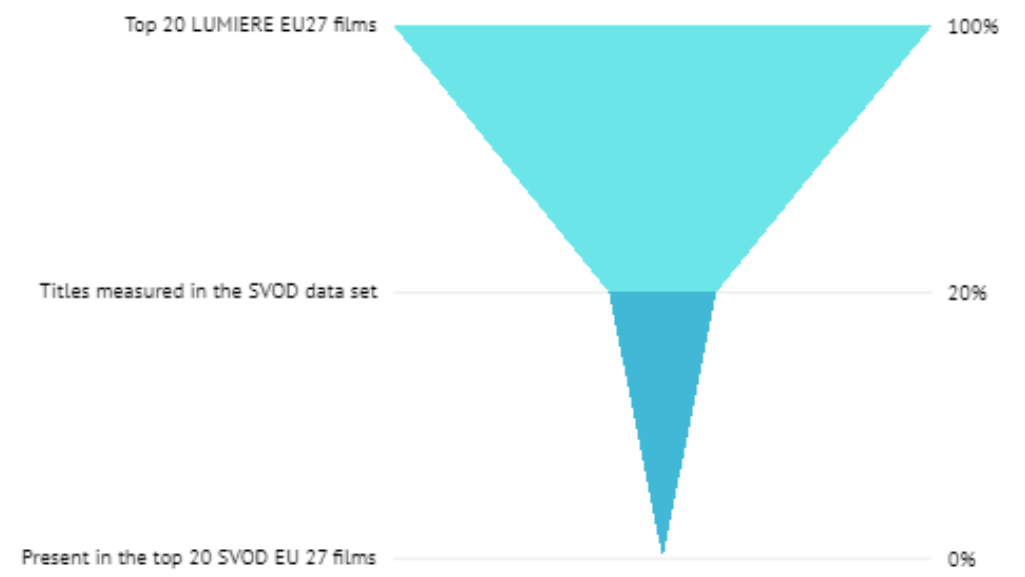
TOP 20 LUMIERE admissions since 1996 – Share of titles measured in SVOD and present in the top 20  
*In % of titles, EU9, all origins*

# Only 5 of the top 100 theatrical EU films since 1996 are in the top 100 most watched films on SVOD

Compared to all origins titles, EU27 titles from the top 100 LUMIERE admissions are fewer to be measured in the SVOD data set and only 5 titles are present in the top 100 SVOD.



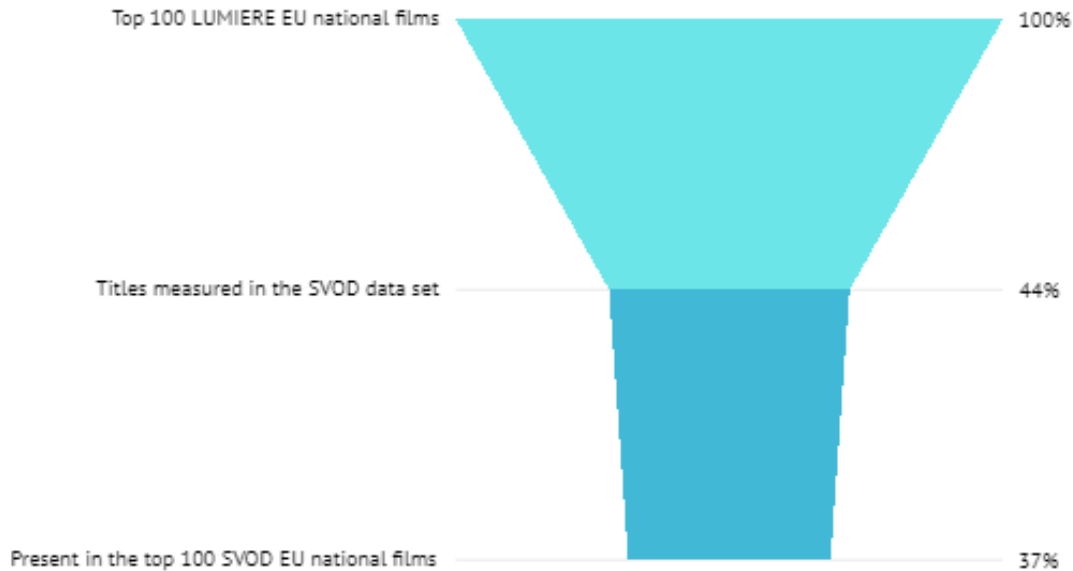
TOP 100 LUMIERE admissions since 1996 – Share of titles measured in SVOD and present in the top 100  
*In % of titles, EU9, EU27 titles*



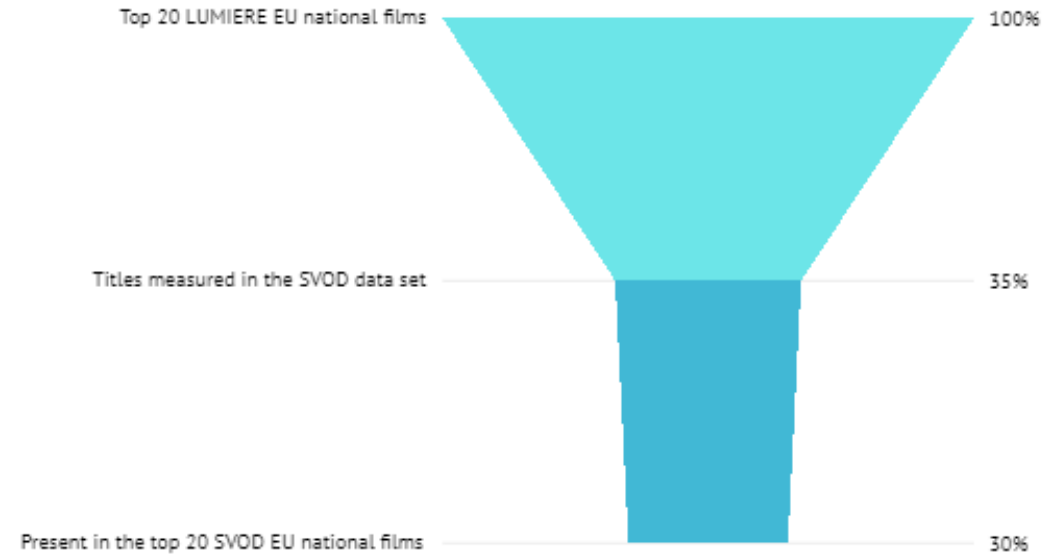
TOP 20 LUMIERE admissions since 1996 – Share of titles measured in SVOD and present in the top 20  
*In % of titles, EU9, EU27 titles*

# When considering only national admissions, more EU films make it to the top 100 most watched films on SVOD

From the top 100 LUMIERE admissions, only 44% of national titles were measured in the SVOD data set. But from those 44 titles, 37 were present in the top 100 SVOD.



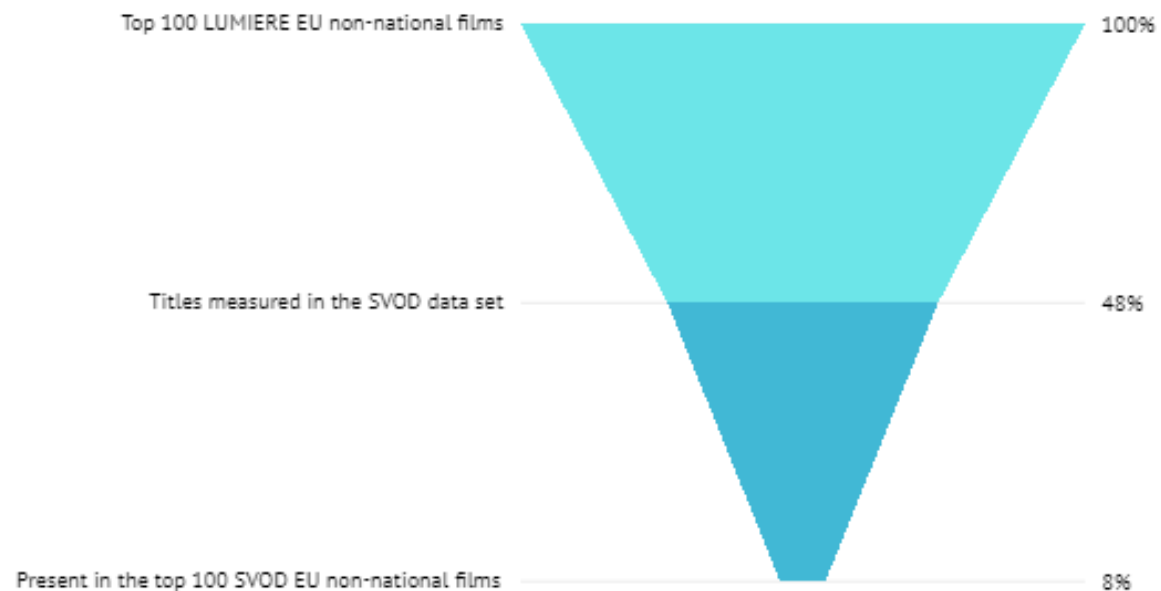
TOP 100 LUMIERE admissions since 1996 – Share of titles measured in SVOD and present in the top 100  
*In % of titles, EU9, EU national titles*



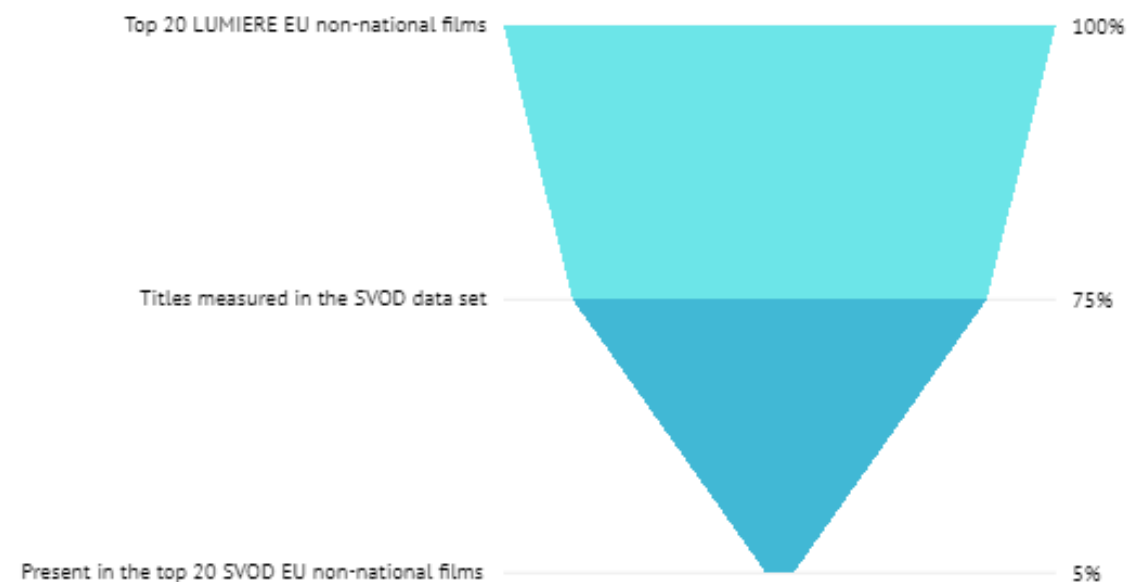
TOP 20 LUMIERE admissions since 1996 – Share of titles measured in SVOD and present in the top 20  
*In % of titles, EU9, EU national titles*

# Top EU films by non-national admissions struggle to access the top 100 most watched films on SVOD

From the top 100 LUMIERE admissions, only 48% of non-national titles were measured in the SVOD data set but unlike national titles, few non-national titles were present in the top 100 SVOD.



TOP 100 LUMIERE admissions since 1996 – Share of titles measured in SVOD and present in the top 100  
*In % of titles, EU9, EU non-national titles*



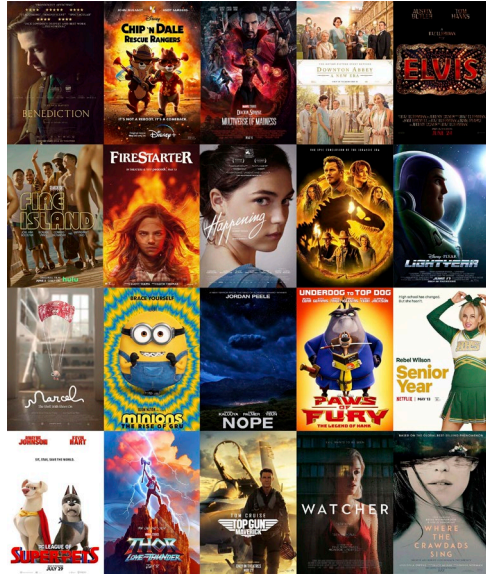
TOP 20 LUMIERE admissions since 1996 – Share of titles measured in SVOD and present in the top 20  
*In % of titles, EU9, EU non-national titles*

## B.2 Does a theatrical release impact SVOD viewing?

- In this section, we analyse whether theatrical films with or without a national release perform better on SVOD than all films.

### Sample

Cinema admissions: 1996 - 2022  
SVOD view time: September 2022 – September 2023



## Titles:

- available on VOD (including those not released in cinemas)
- released in 1996 or later

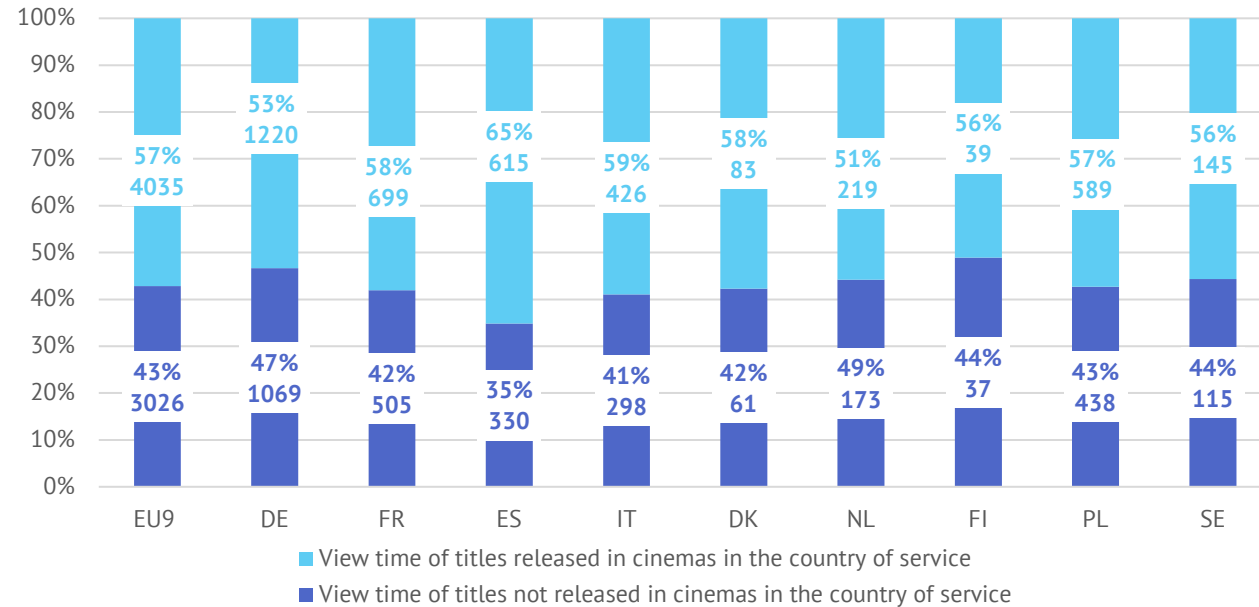
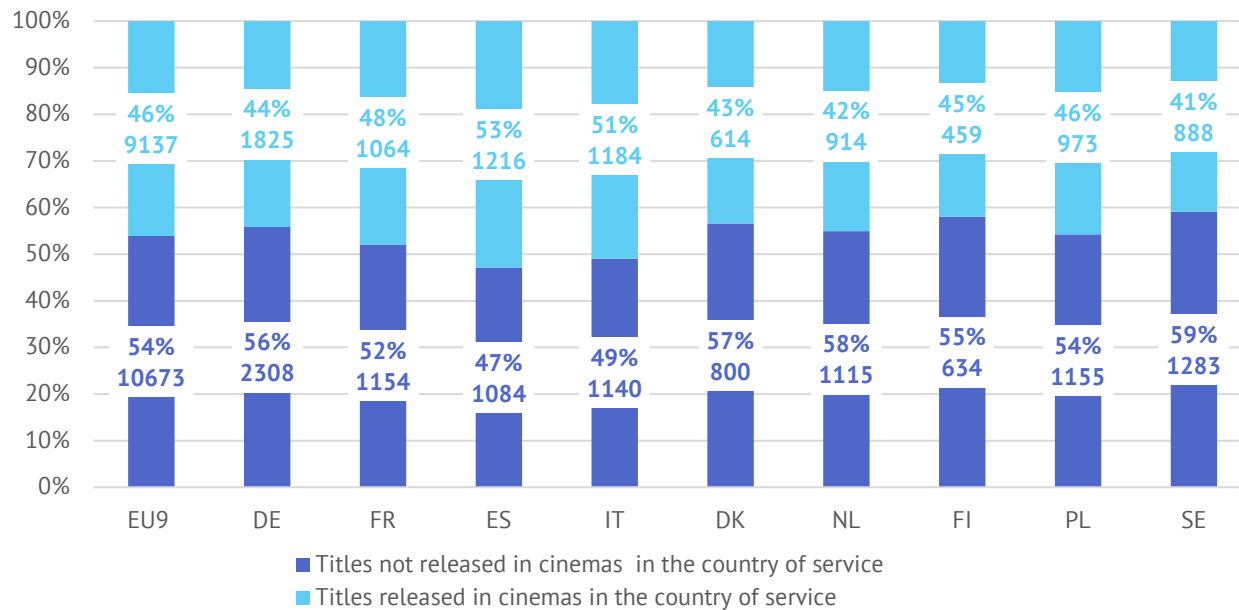
Median in view time has been calculated by considering view time for SVOD titles released in 1996 or later from Goldmedia data from September 2022 to September 2023.

## Based on this a film can be:

- released in cinemas in the country of service and above the view time median on SVOD;
- released in cinemas in the country of service and below the view time median on SVOD;
- not released in cinemas in the country of service and above the view time median on SVOD;
- not released in cinemas in the country of service and below the view time median on SVOD.

# Films released in cinemas in the country of service received more view time on SVOD

- Across the whole sample, 46% of measured works were released in cinemas in the country of service and accounted for 57% of total view time.
- Sweden and Denmark are the countries where released cinemas titles generate the most view time compared to their shares in catalogue.



MEASURED WORKS - Share of measured works in cinemas vs not released in cinemas in the country of service, per country  
In % and number of titles, films released in 1996 or later, all origins

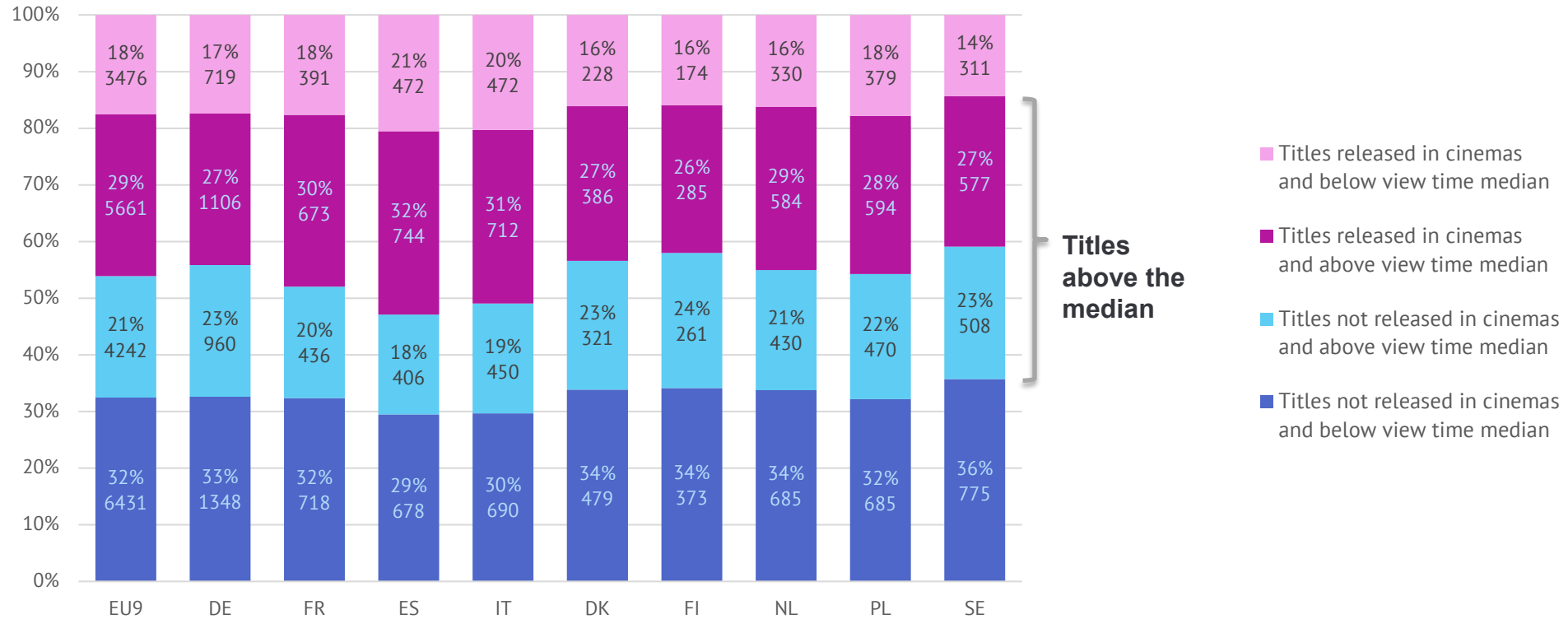
VIEW TIME - Share of view time for released cinema titles and not-released cinema titles in the country of service, per country  
In % and millions of hours of view time, films released in 1996 or later, all origins

Source: European Audiovisual Observatory analysis of Goldmedia and LUMIERE data



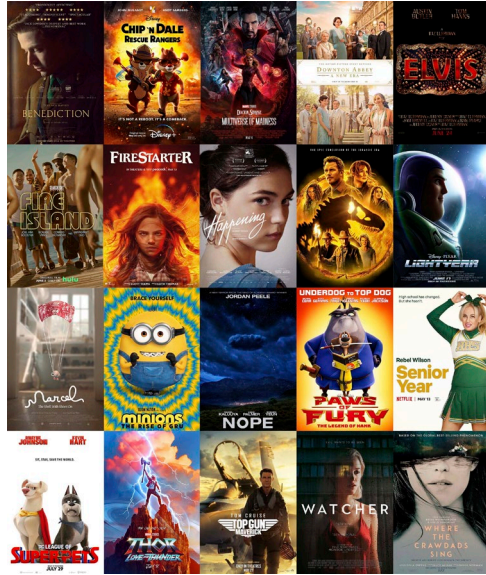
# Films released in cinemas in the country of service are more likely to rank above the median view time on SVOD

- Films released in cinemas in the country of service are more likely to be above the SVOD view time median than titles which were not released there.
- Spain has the highest share of titles released in cinemas and above the median.



Share of titles above and below median of view time on SVOD  
*In % and number of titles, films released in 1996 or later, all origins*

Source: European Audiovisual Observatory analysis of Goldmedia and LUMIERE data



## Titles:

- available on VOD
- any year of release
- not released in cinemas in the country (including originals)

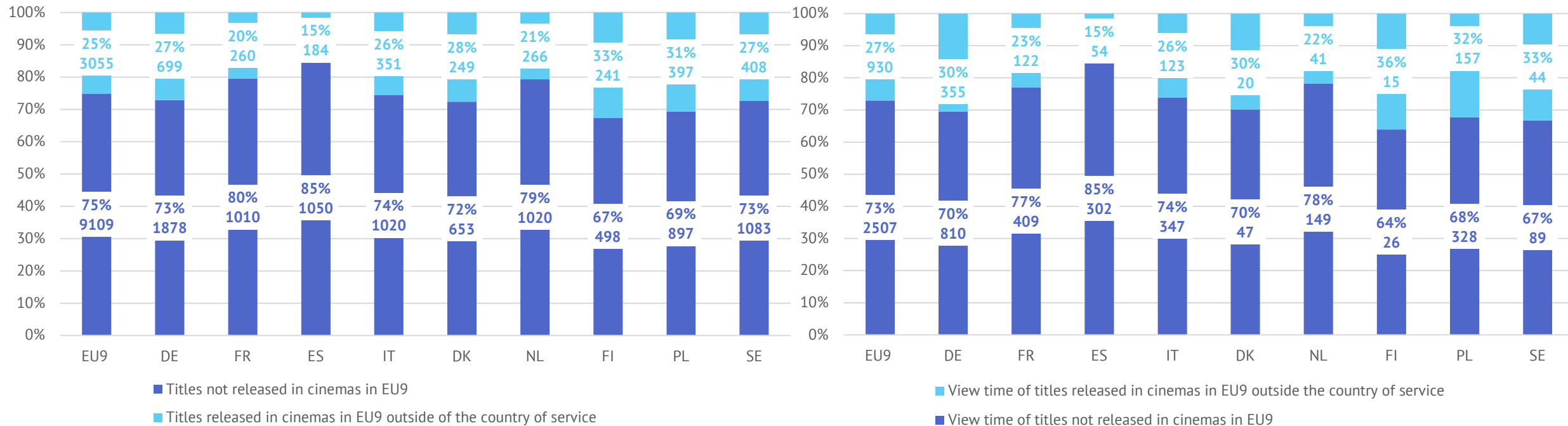
Median in view time has been calculated by considering view time for all titles from Goldmedia data from September 2022 to September 2023.

Based on this a film can be:

- released in cinemas in at least one country of the sample besides the country of service and above the view time median on SVOD;
- released in cinemas in at least one country of the sample besides the country of service and below the view time median on SVOD;
- not released in cinemas in any EU9 country and above the view time median on SVOD;
- not released in cinemas in any EU9 country and below the view time median on SVOD.

# Cinema release in another country also appears to have a positive impact on SVOD view time

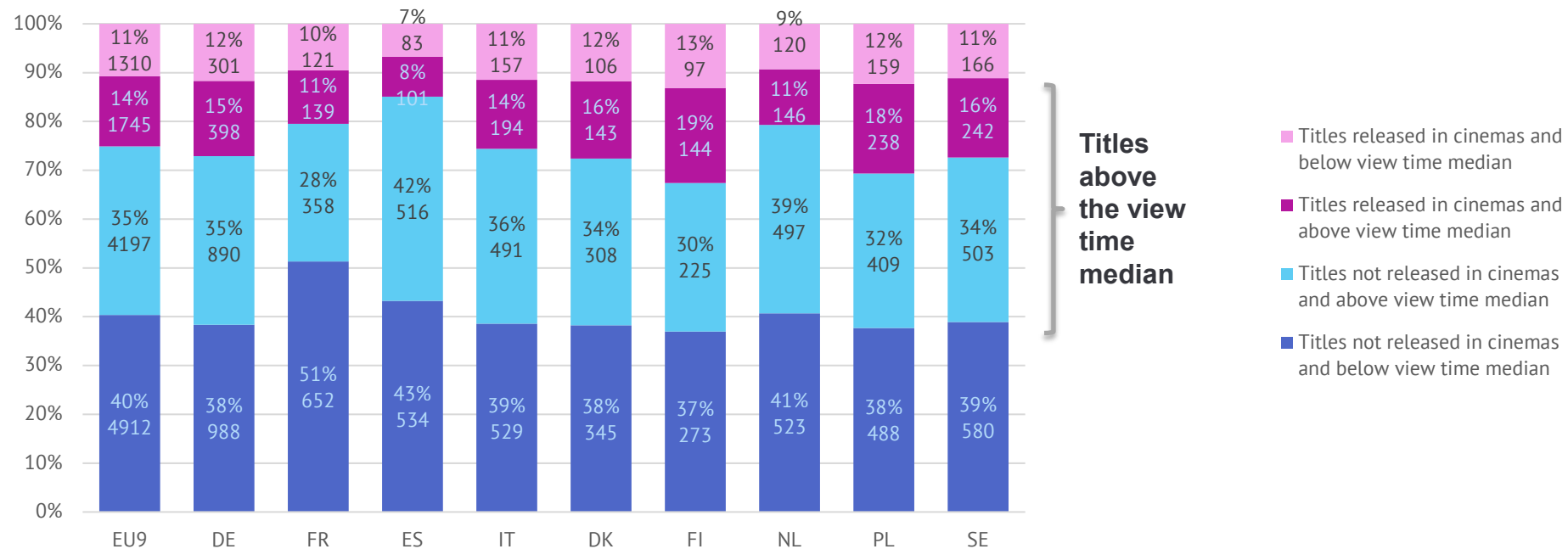
- Across the whole sample, 25% of works were released in cinemas in at least one country of the sample (country of service excepted), but they accounted for 27% of view time.
- Except in Spain and Italy, films released in cinemas in another country received more view time than those which were not.



Source: European Audiovisual Observatory analysis of Goldmedia and LUMIERE data

# Released cinema titles are more likely to rank above the view time median even if released outside the country of SVOD consumption

- Films released in cinemas outside the country of service are more likely to be above the SVOD view time median than titles which were not released.
- Finland has the highest share of titles released in cinemas and above the median.



Share of titles above and below median of view time on SVOD  
 In % and number of titles, all origins

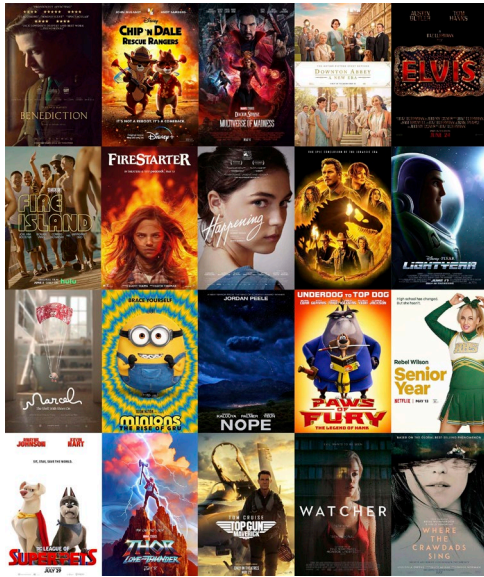
Source: European Audiovisual Observatory analysis of Goldmedia and LUMIERE data

## **B.3 Is there a correlation between cinema admissions in a country and SVOD view time in the same country?**

- **In this section, we compare the number of a film cinema admissions in a country with its success on SVOD.**

### **Sample**

Cinema admissions: 1996 - 2022  
SVOD view time: September 2022 – September 2023



## Titles:

- available on VOD and in cinemas in the same country
- released in 1996 or later
- with at least 1 000 admissions

The median in admissions has been calculated considering admissions since 1996.

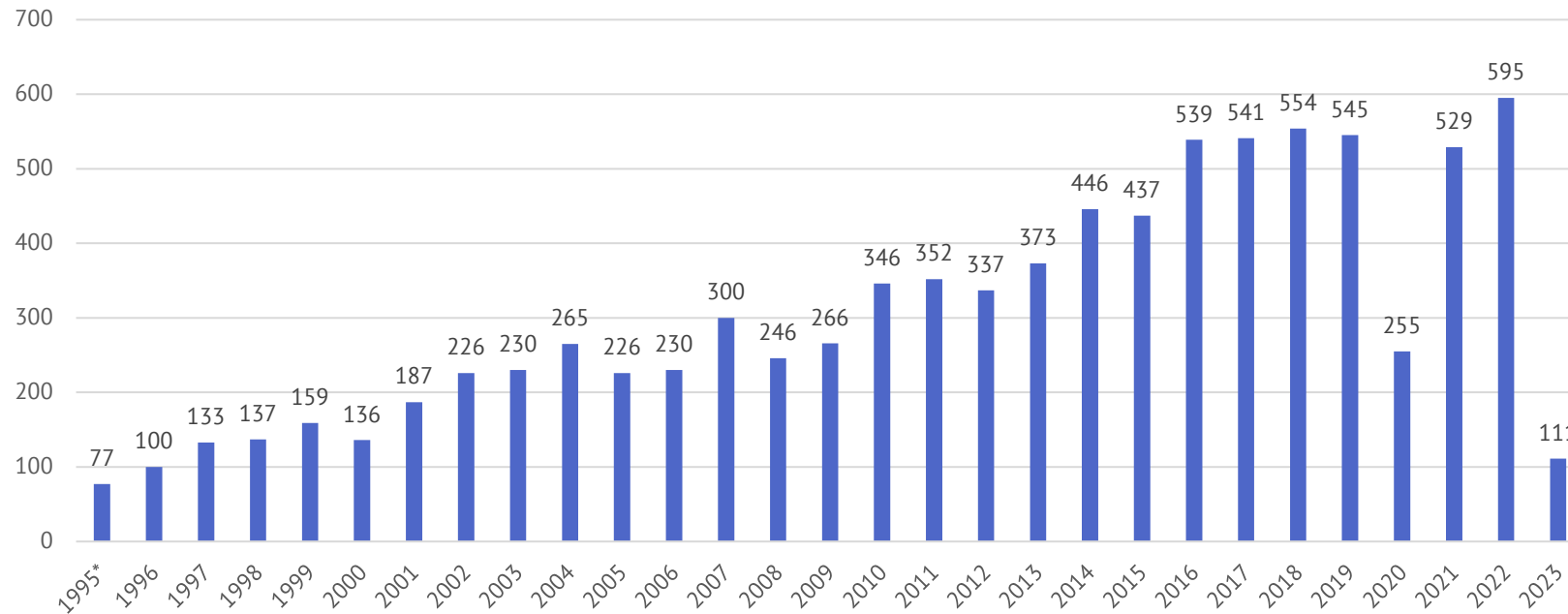
The median in view time has been calculated by considering view time for titles produced in 1996 or later from Goldmedia data from September 2022 to September 2023.

Based on this a film can be:

- below the admission median in cinemas and below the view time median on SVOD;
- above the admission median in cinemas and below the view time median on SVOD;
- below the admission median in cinemas and above the view time median on SVOD;
- above the admission median in cinemas and below the view time median on SVOD.

# Breakdown of films which were both available on SVOD and cinema in one country by year

- 8 878 titles were considered.



\*1995 titles were included if they had admissions in LUMIERE

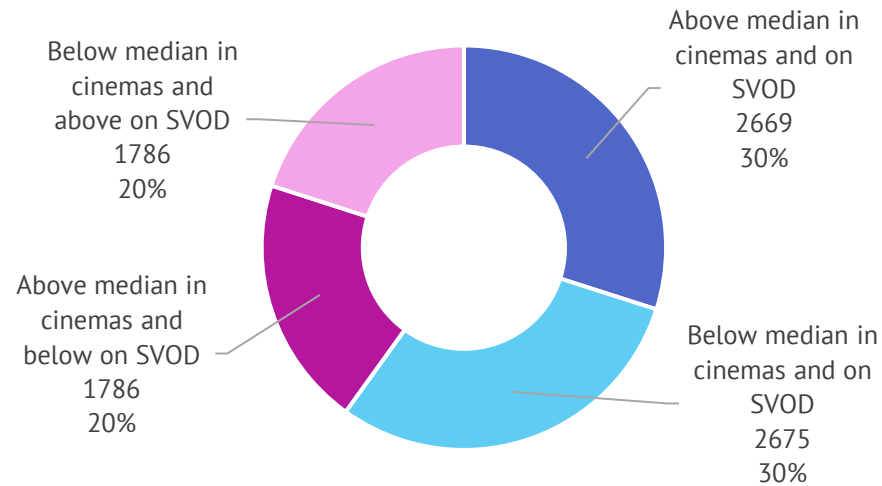
ALL ORIGINS – Number of titles by year of release

*In number of titles, films released in 1996 or later, all origins, both cinema releases and SVOD, per country*

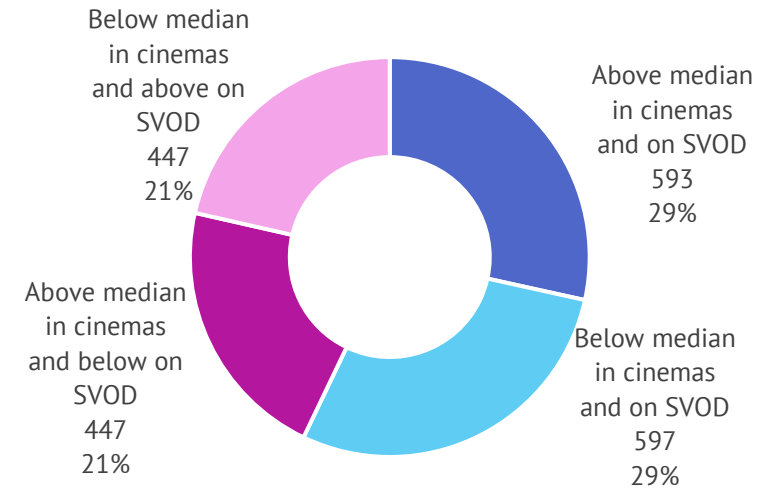
Source: European Audiovisual Observatory analysis of Goldmedia and LUMIERE data

# SVOD usually reflects the success of films in cinemas

- 60% of titles performed the same in SVOD and in cinemas.
- When it comes to EU27 titles only, the share is slightly lower (58%).



ALL-ORIGIN TITLES - Share of titles above and below cinema admissions median and median of view time on SVOD  
*In % and number of titles, films produced in 1996 or later, all origins, both cinema releases and SVOD, EU9*



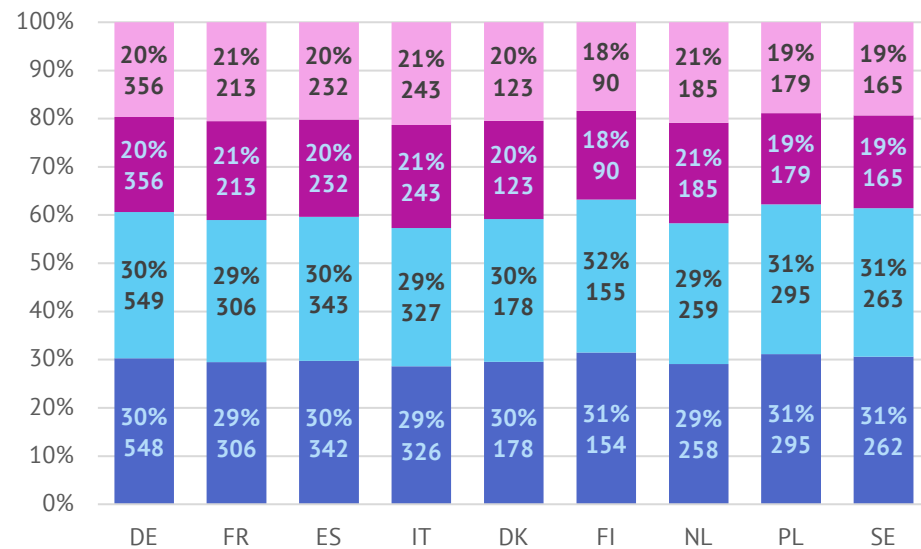
EU27 TITLES - of titles above and below cinema admissions median\* and median\* of view time on SVOD  
*In % and number of titles, films produced in 1996 or later, EU27 productions, both cinema releases and SVOD, EU9*

\*Median recalculated with only EU27 titles

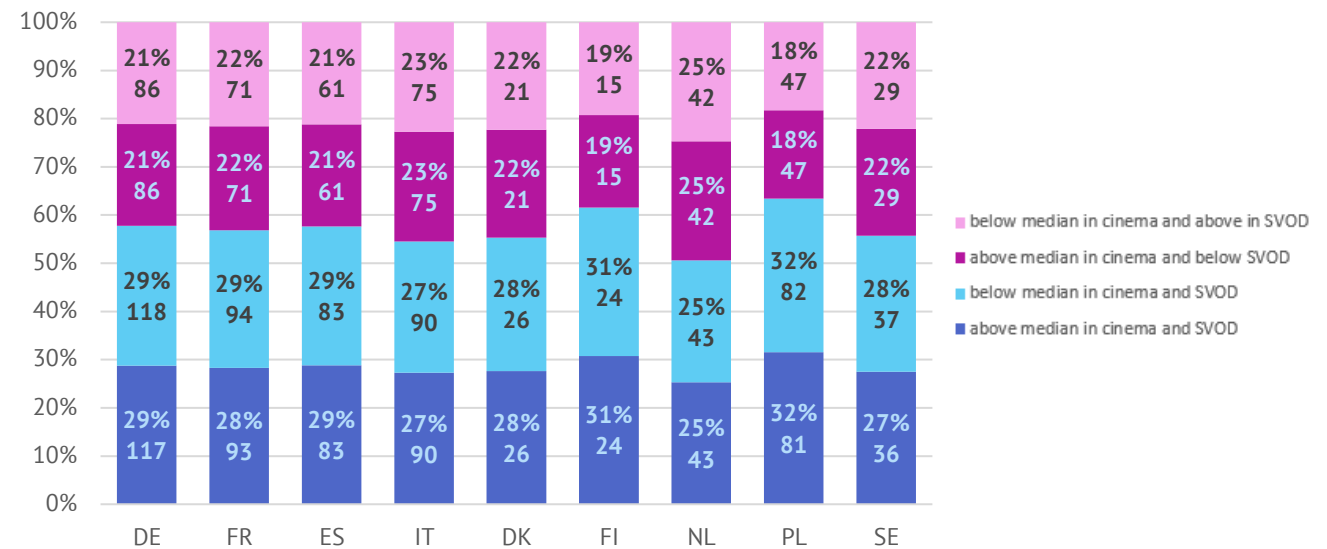


# Similar results among the 9 countries of the sample

- The analysis per country shows the same trend among the EU9. Differences are slightly bigger when only EU27 titles are considered.
- For EU27 titles, success or failure in cinemas is least reflected on SVOD in the Netherlands.



ALL ORIGINS - Share of titles above and below median of admissions in cinema and median of view time on SVOD  
*In % and number of titles, films produced in 1996 or later, all origins, both cinema releases and SVOD, per country*

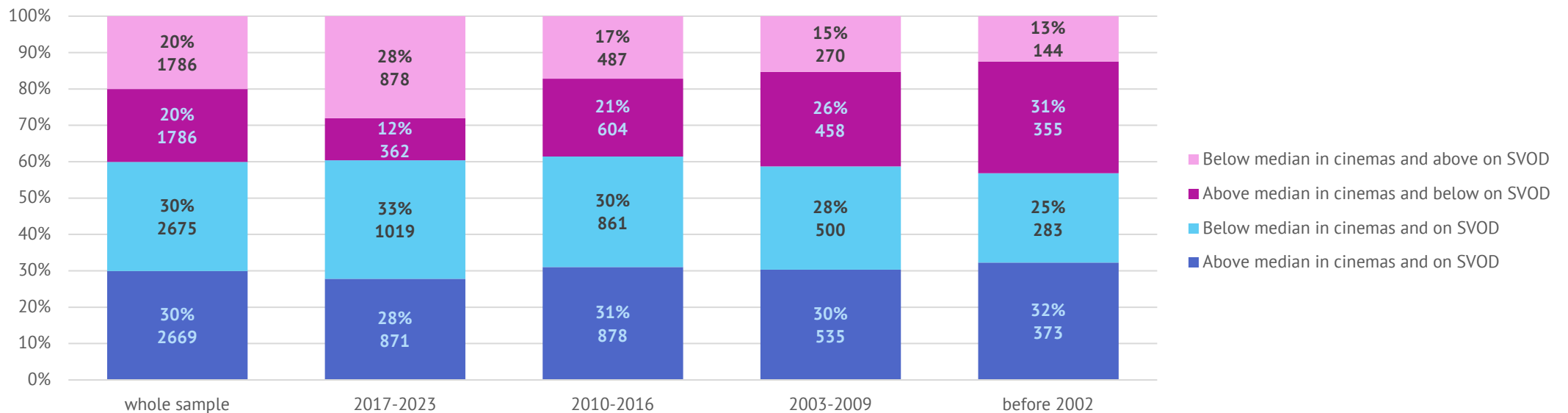


EU27 - Share of titles above and below median\* of admissions in cinema and median\* of view time on SVOD  
*In % and number of titles, films produced in 1996 or later, EU27 production, both cinema releases and SVOD, per country*

\*Median recalculated with only EU27 titles

# Recency appears to play a key role in success on SVOD platforms after a release in cinemas

- Recent films were more likely to be above the median on SVOD, even if they were below the median in cinemas (28%).
- Films released before 2002 were more likely to be below the median on SVOD, even though they were above the median in cinemas (31%).

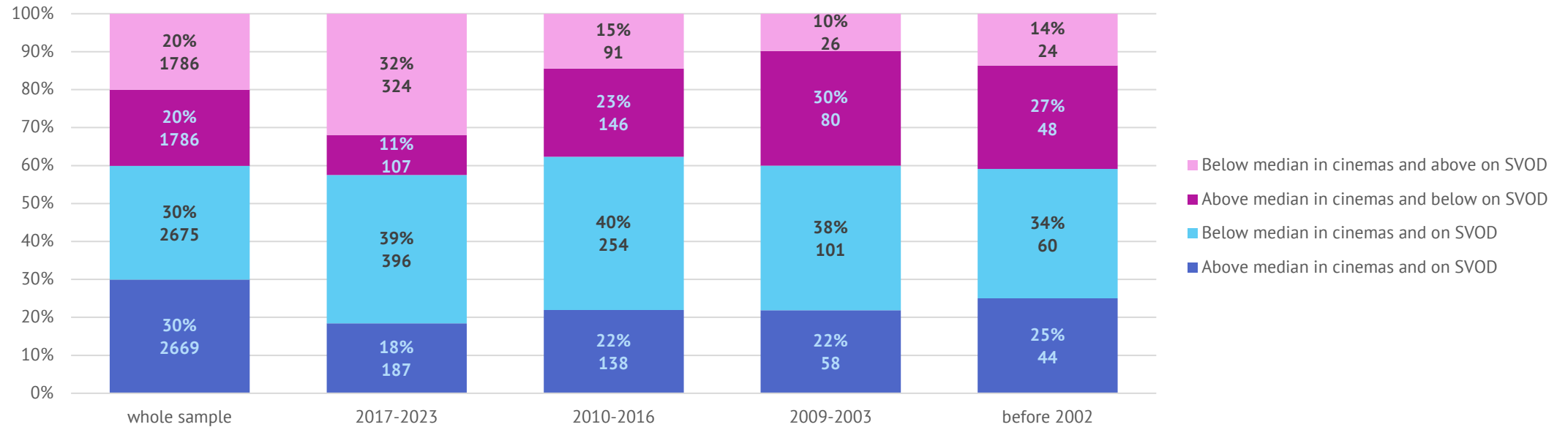


ALL ORIGINS - Share of titles above and below median of admissions in cinema and median of view time on SVOD  
*In % and number of titles, films released in 1996 or later all origins, both cinema releases and SVOD in at least one country, EU9*

Source: European Audiovisual Observatory analysis of Goldmedia and LUMIERE data

# For EU27 films, recency appears to play an even greater role in success on SVOD platforms after a release in cinemas

- For titles produced in the EU27, there is a clear gap between recent films (2017-2023) and the rest: 32% were above the median on SVOD, even if they were below the median in cinemas when released in 2017 or later.

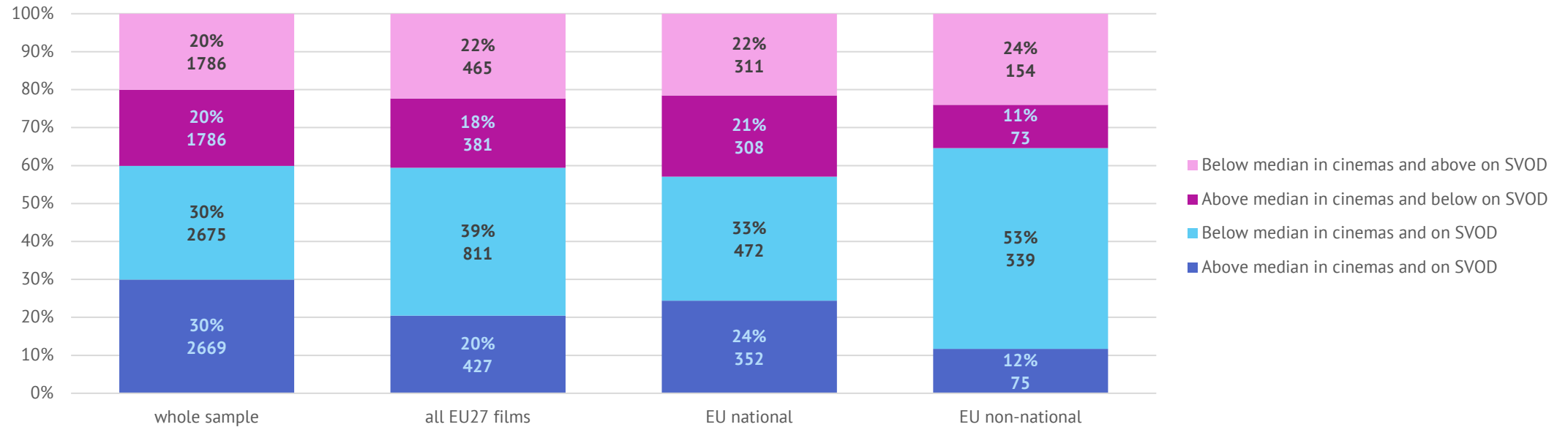


EU27 FILMS - Share of titles above and below median of admissions in cinema and median of view time on SVOD  
*In % and number of titles, films released in 1996 or later, EU27 productions, both cinema releases and SVOD in at least one country, EU9*

Source: European Audiovisual Observatory analysis of Goldmedia and LUMIERE data

# EU27 films are overrepresented among below-median titles in cinemas and on SVOD

- EU non-national productions were less likely to be above the median in cinemas and on SVOD and more likely to be below the median in cinemas and on SVOD.



Share of titles above and below median of admissions in cinemas and median of view time on SVOD  
*In % and number of titles, films produced in 1996 or later, EU27 productions, both cinema releases and SVOD in at least one country, EU9*

Source: European Audiovisual Observatory analysis of Goldmedia and LUMIERE data

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