



# Theatrical Distribution or Online Streaming? Release Strategies in Europe in Times of Disruption and Change

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Release strategies, exhibition windows and market accessibility are critical aspects of the process of film circulation. Each of those aspects has attracted increased attention in the streaming era, particularly during the Covid-19 pandemic. Characteristic of this period is the way that streaming platforms have reshaped circulation patterns for films. There are now a variety of ways through which films are released and become available to audiences. Release strategies have important implications for films: in terms of the

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exhibition windows in which they become available, when they become available in those windows, and for how long they remain available. Studies of media distribution conceptualise this as a process of managing market accessibility through time and space (Cubitt 2005; Brannon Donoghue et al. 2021). Release strategies also have wider implications for the film industry and film audiences. Different release strategies involve different ways of generating value for films, different ways of reaching audiences, and different ways of shaping how audiences perceive and make sense of films.

Film release strategies have developed rapidly since the arrival of streaming platforms in the mid-2000s. Three periods can be identified in the streaming revolution in the film industry. First, there was a long period of trying and testing with release strategies that were tailored to streaming platforms rather than to cinema exhibition. While that provided opportunities for producers and distributors to experiment with different types of films, it was particularly supportive of the distribution of small, low-budget films with very limited release opportunities in cinemas (Iordanova 2012; Smits 2017; Baschiera et al. 2018). Second, the development of powerful global streaming platforms in the past eight years or so has triggered discussions about release strategies for so-called original productions – that is, productions designed for some sort of online release rather than theatrical release (Doyle 2016; Smits 2019). Netflix and Amazon Prime, and more recently Disney+, HBO Max and other global platforms have been driving forces behind this phase of the streaming revolution. Third, circumstances for film releases changed during the COVID-19 pandemic (Meir 2021; Higson and Treadwell 2023). With cinemas being closed or operating with limited seating capacity, streaming platforms became an increasingly valuable part of the film release process.

This chapter provides insights into the development of streaming-related release strategies during the pandemic, with particular reference to the European market. I am particularly interested in the relationship between streaming platforms and theatrical cinema exhibitors, a relationship that is often described in terms of conflict and tension. For some in the industry, streaming platforms are perceived as a threat to the theatrical cinema sector, particularly because some films are withheld from a cinema release and become directly available on streaming platforms. The effect is that cinema exhibitors no longer have full control over the first release window. For others in the industry, streaming platforms are symptomatic of the way that the modern era of film exhibition is taking shape, with different

distribution systems co-existing to enable different routes to market for different films. This chapter draws on trade press and news coverage to analyse how the relationship between streaming platforms and cinema exhibitors developed during the pandemic. What sort of release strategies for films became common when lockdowns and other policy restrictions were imposed on cinema exhibitors? How did changing circumstances impact release windows for films, and in particular the theatrical cinema window? And has the pandemic brought about structural changes to the film distribution and exhibition businesses in Europe and beyond?

The focus will be on release strategies developed for Hollywood studio films and independent films in various European countries, including Germany, France, Spain, the UK and the Netherlands. Hollywood studio films and independent films are different types of films at different ends of the film culture spectrum, and are part of different distribution and release systems. As I have noted elsewhere: ‘Hollywood studios have established global distribution networks to ensure that the films they engage with are shown in countries worldwide’ (Smits 2019, 6). Their globally coordinated release strategies will be addressed in this chapter because Germany, France, Spain, the UK and the Netherlands are part of their distribution networks. By comparison, independent films are typically released on a country-by-country basis through a range of different distributors in different countries. I will analyse the routes to market of both types of films to provide a fuller understanding of streaming-related release strategies during the pandemic, rather than engaging with just one of the two. While other types of films are situated between the poles of Hollywood studio films and independent films, they fall beyond the scope of this analysis.

What I will demonstrate in this chapter is that release strategies for films became more flexible during the pandemic, and that exclusive theatrical windows have become significantly shorter, meaning that films move more quickly to online availability. That is very much a development that benefits streaming platforms rather than cinemas, putting more pressure on their relationship of conflict and tension. The chapter will also look at the development of virtual cinemas, which are streaming platforms designed by, or for, cinema exhibitors to extend their business from the theatrical market to the online market. That provides a different perspective on the relationship between streaming platforms and cinema exhibitors. It draws attention to forms of collaboration that have developed to come to terms with changing industry circumstances. I will argue therefore that the relationship between streaming platforms and cinema exhibitors should be understood in terms not only of conflict and tension, but also of collaboration.

## RELEASE STRATEGIES AND EXHIBITION WINDOWS

In order to establish a context for this chapter, I will introduce three types of release strategies in this section, including conventional staggered releases, direct-to-streaming and day-and-date. These three release strategies are employed to varying degrees in European countries and around the world, and as such are part of broader international developments. My focus, however, will remain primarily on Germany, France, Spain, the UK and the Netherlands in the chapter.

First, the most common release strategy is the conventional, staggered release strategy. This is organised according to a hierarchical order of exhibition windows, with the purpose of protecting theatrical cinema exhibition as the first window in the hierarchy. Films are first released in cinemas, and then on a staggered basis gradually open up to the online video-on-demand (VOD) market for streaming platforms, the DVD and Blu-ray market, the television market, and elsewhere. While it is a well-established model, discussions in the industry have been taking place for a long time about windowing times that determine for how long films remain exclusively available for cinema exhibition, and when they become available in other exhibition markets (Vlessing 2015; Faughnder 2016, 2020). Questions are also asked about whether this model remains sustainable for all types of films.

Film journalists have repeatedly observed that producers and distributors do not always benefit from a long theatrical release window because too many films are released in cinemas (Macnab et al. 2017; Farkonas 2021). The effect is that most films are pulled out of cinemas well before they are allowed to show on streaming platforms because a lengthy window has been imposed by theatrical exhibitors. As one independent distributor noted of the German market in the period before the COVID-19 pandemic: ‘This probably goes for all the territories, but we have by far too many films being released in theatres. There is not enough space for every title, and it is getting more and more difficult for a film to stand out’ (Lehmann quoted in Silva 2020). Circumstances for independent films in the period before the pandemic were also challenging in Spain, as another distributor notes: ‘Every week we have 13 or 14 titles coming to the theatres, while a few years ago the average was 7 or 8. The market has become

more difficult for the traditional distributors' (Pérez quoted in Silva 2020). Even if countries have well-supported public funding systems in place for the circulation of independent films in cinemas, a long exclusive cinema window could thus be counterproductive, particularly for films that end up spending little time in cinemas.

Another concern about the future of the conventional, staggered release model is that most of the Hollywood studios are heavily investing in their own subscription-based VOD streaming platforms. A long theatrical window has traditionally been in the interest of Hollywood studios to generate exposure for their films and maximise economic value, but the online market is becoming increasingly valuable for their films (Faughnder 2020; Farkonas 2021). This again raises questions about the continuing value of long windows for theatrical releases. Hollywood studios with their own SVOD platforms are in a powerful position to renegotiate release window times given the economic value that their films represent for cinema exhibitors, and that puts further pressure on cinema exhibitors and the length of time that films are exclusively on show in cinemas.

In pre-Covid times, Hollywood studios undertook various experiments with shorter releases for mainstream films to gather knowledge and prepare for future changes in film distribution. In 2015, for instance, Paramount Pictures developed an early online release strategy for the mid-budget films *Paranormal Activity: The Ghost Dimension* (Gregory Plotkin, 2015) and *Scout's Guide to the Zombie Apocalypse* (Christopher Landon, 2015) in the US market, with the films becoming available on streaming platforms only two weeks after their theatrical release. At that time, such films became available on transactional video-on-demand (TVOD) platforms rather than subscription video-on-demand (SVOD) platforms. Paramount collaborated with several US cinema chains, including AMC Theatres, with the arrangement that the cinemas would continue to receive a percentage of online revenues from TVOD sales and rentals for the full length of the conventional theatrical release window of 90 days in the US (Vlessing 2015). Such experiments remained fairly unique in the years that followed, particularly because cinema exhibitors were vehemently resisting change (Faughnder 2020). During the pandemic, however, such deals were once again established between some of the Hollywood studios and the major cinema chains, this time in the US and the UK, as I will explain in the next section of this chapter.

Discussions about the length of the theatrical window and the implications for particular types of films are taking place in many countries. Every

country has a particular structure in place through which the release window for films in cinemas is organised. That structure is based on industry arrangements established between film distributors and exhibitors, or on specific policies established by public film agencies or governments to regulate the exhibition market, or on a combination of industry agreements and policies. Before the pandemic, for instance, windowing times between the cinema release and the online release in large European markets such as Germany, France and the UK were four months (Blaney 2021; Roxborough 2022; Dalton et al. 2022). But in Germany, publicly-funded films have an even longer theatrical release window of five months, and in some cases six months (FFG 2016).<sup>1</sup> If distributors do not respect release windows, exhibitors may turn against them and show films from other distributors, or in some cases such distributors can become ineligible for public funding schemes.

Release times for films have been established between windows but also within windows. The online window in particular is in some countries structured according to different platforms and streaming strategies. In France, for instance, there are long waiting times between TVOD and SVOD platforms. In pre-Covid times, films became available on TVOD platforms four months after the theatrical opening, but those same films would only become available on SVOD platforms after 36 months, a much longer period (Zilko 2022). The television broadcast window is also generally prioritised over the SVOD window in France, meaning that the release of films on SVOD platforms necessarily follows after scheduled television screenings have taken place.

Since early 2022, however, some of the most powerful SVOD platforms have managed to negotiate a shorter release window with the French regulation authority for Audiovisual and Digital Communication (ARCOM), which was a major breakthrough (Roxborough 2022).<sup>2</sup> The time between the theatrical window and the SVOD window is based on the financial investment of individual SVOD platforms in the French film industry on a yearly basis, particularly their investment in the production of independent French films due to be released in French cinemas. That means that different release window arrangements are in place for individual SVOD platforms. Marc-Olivier Sebbag, Managing Director of the Association for Cinema Exhibitors in France, notes that 'If you pay more, you go first' (quoted in Roxborough 2022). Netflix invests more than other platforms in French film production, with the effect that their films become available fifteen months after the theatrical opening (Roxborough

2022). By comparison, films on Disney+, Amazon Prime and Apple TV Plus become available after seventeen months (Roxborough 2022).

Having established a broad context for conventional, staggered release strategies, the second release strategy that I discuss is direct-to-streaming, which is also known by the terms direct-to-VOD or straight-to-VOD. On the one hand, this release strategy has become a solution for small, independent films with very modest distribution opportunities in cinemas. Rather than a cinema release, such films become directly available online, primarily on TVOD platforms. On the other hand, the direct-to-streaming strategy has become an important part of the business of the global SVOD streamers. Such release strategies are often developed for original productions of different sizes commissioned and acquired by them, including high-budget films. They then become available exclusively on their own SVOD platforms. In this context, direct-to-streaming is often regarded as a disruptive release strategy, since films released in this way sidestep the theatrical market (Smits 2019, 172; Burgess and Stevens 2021, 71).

The benefit of the direct-to-streaming strategy for the global platforms is that it offers opportunities for films of varying sizes to circulate widely on those platforms. These platforms also provide access to both exclusive and non-exclusive content for audiences. For example, Netflix has carefully nurtured this strategy, for a market that they reported in July 2022 to consist of 221 million paid memberships in 190 countries worldwide (Netflix 2022). To make the most of this strategy, they have substantially invested in original productions and other exclusive titles for their catalogue over the past eight years. Such titles are occasionally referred to as original-branded productions, and include films, television series and other types of screen content. According to research by Ampere Analysis, the number of such original-branded productions in the Netflix US catalogue reached a new high in March 2022, accounting for more than 3700 titles (53%) of a total of 7000 titles (Hall 2022). Direct-to-streaming, or in this case, direct-to-Netflix, release strategies are particularly developed for such original-branded titles. The same research by Ampere Analysis found that the SVOD streaming platform Amazon Prime is less invested in this strategy, with original-branded productions accounting for just 9% of their SVOD catalogue in the US (Hall 2022).

The third strategy that I discuss is the day-and-date release, whereby films open simultaneously in cinemas and on streaming platforms. This release strategy is roughly located between the conventional, staggered release and the direct-to-streaming release. The benefit of day-and-date

releases is that audiences are provided with immediate access to new films, both in cinemas and online, without a holdback between those windows (Kehoe and Mateer 2015, 102; Smits 2019, 19). Providing simultaneous access in cinemas and online can again be understood as a disruptive strategy for the business of cinemas exhibitors. However, there are a variety of reasons behind day-and-date strategies, depending on the type of film. First, distributors are unable to commit to a long theatrical release window for some films because audience demand in cinemas is too low. A day-and-date release is one of the strategies that could be developed in this context. Second, some films are designed primarily for SVOD platforms, but they initially open in combination with a cinema release to raise additional awareness and publicity, and occasionally to make them eligible for awards. A third reason why distributors develop day-and-date release strategies for some films is because they believe in the concept, and especially in the idea of giving audiences a choice to watch new releases in cinemas or online, and believe it has economic benefits as a result.

Despite the benefits of this release strategy, it remained an experimental model in pre-Covid times. Cinema exhibitors and trade associations in most countries have been sceptical and opposed changes to conventional, staggered release patterns (Faughnder 2016). There have been a few countries where a small number of distributors, cinema exhibitors and streaming platforms have seriously engaged with day-and-date releases, including in the European context the UK. Some distributors have, for example, worked with Netflix to release their Netflix originals, while others have experimented themselves with day-and-date releases (Wiseman 2017).<sup>3</sup> But also in those countries, other release strategies for films have been prioritised. The UK film distribution and exhibition company, Curzon, is among the few companies that regularly develops day-and-date release strategies for films, as I will explain shortly.

While different types of release strategies were developed in the pre-Covid era, the closure of cinemas during the pandemic helped to accelerate processes of change in the film exhibition sector. As noted by industry observers during the pandemic: 'Cinema distribution and theatrical exhibition as we know them are evolving to a place where they are becoming unrecognisable compared to where we were just over two years ago' (Dalton et al. 2022).



## RELEASING HOLLYWOOD STUDIO FILMS IN EUROPE DURING COVID-19

I will describe the impact of COVID-19 on release strategies for both Hollywood studio films and independent films in Europe in the next two sections. While some of the global streaming platforms had already become very powerful and release patterns were already changing, the pandemic put further pressure on conventional, staggered release strategies and the business of cinema exhibitors, in Europe as much as elsewhere. Because cinemas were closed or operated with reduced seating capacity, distributors postponed the release of different types of films. The decisions on the part of Hollywood studios to postpone the release of many big-budget, blockbuster films, including the James Bond film *No Time to Die* (Cary Joji Fukunaga, 2021) and *Spider-Man: No Way Home* (Jon Watts, 2021), were regarded as major setbacks for the exhibition sector.<sup>4</sup> Some of the biggest cinema chains subsequently announced that they would remain closed, even in periods when they could operate at a reduced seating capacity. In the UK, for instance, the Cineworld, Odeon and Picturehouse cinema chains remained closed for several months. As a result, cinema exhibitors faced major financial challenges and the jobs of many thousands of employees in the UK alone were at risk (Pulver 2020).

Cinema closures also had devastating consequences for Hollywood studio films that played in cinemas in the period immediately before March 2020, since their theatrical release windows were broken. That meant in most cases that these films were released much earlier than usual online. Amongst the first such films were Universal's *The Invisible Man* (Leigh Whannell, 2020), Sony's *Bloodshot* (Dave Wilson, 2020), Warner's *Birds of Prey* (Cathy Yan, 2020) and Paramount's *Sonic the Hedgehog* (Jeff Fowler, 2020). In European markets such as the UK and Germany, they were initially scheduled for a standard theatrical release window of four months, but they became available online within between one and five weeks because of lockdowns and cinema closures.<sup>5</sup> For example, *The Invisible Man* was released in German cinemas on 27 February 2020, and online on 22 March 2020.

It is worth noting that such films became available online first in the so-called premium VOD (PVOD) window, which carried with it premium prices for viewers. That window provided early and exclusive access to those films on selected TVOD platforms, such as Amazon Prime, iTunes/Apple TV and Google Play.<sup>6</sup> In the catalogues for these platforms in

European countries such as Germany and the UK, these films were included in prominent categories such as ‘home premieres’, ‘early access’ and ‘latest cinema releases.’ This meant they were only available for a premium rental or purchase price that was higher than the price of an average cinema ticket in the UK and Germany. These films subsequently remained available in the PVID window for several weeks before the online release opened up to a wider range of pay-per-view TVOD platforms, and eventually to other platforms such as SVOD or advertising VOD, and other ancillary markets. That online release pattern was developed before the pandemic as part of conventional, staggered release strategies, and remained in place in the first waves of the pandemic. The difference was that the initial exclusive theatrical window was abruptly shortened and the online release pattern was set in motion much sooner than initially planned.

If Hollywood studios developed early release strategies for some films that were initially shown in cinemas, they also developed straight-to-streaming releases for other films released during the early stages of the pandemic. Universal Pictures prepared a theatrical cinema release and marketing campaign for the big-budget film *Trolls World Tour* (Walt Dohrn and David P. Smith, 2020) in April 2020, but cinemas in the UK, Germany and most other European markets were already closed at that point (Pulver 2020; Kürten 2020). Rather than delaying the release in order to show the film in cinemas, Universal made it directly available on selected TVOD platforms in the PVID window, before opening up more widely in the UK, Germany and elsewhere. One advantage of such releases for Hollywood studios was that they were able to retain control over the release times and the circumstances under which such films became available to online audiences, and thus avoided uncertainties about release dates and screening space in cinemas when they reopened. Another advantage was that they were able to gather more data and intelligence about the value of the PVID window. According to several reports, *Trolls World Tour* generated revenues of just under \$100 million in the first three weeks in the US market alone, and it was often used as an example in the media to demonstrate how valuable the PVID window could be (Schwartzel 2020). Such intelligence about the online revenues for films could then be used to develop release strategies for other films, but also to negotiate new distribution deals with cinema chains (Faughnder 2020). That said, figures about the online performance of films during the Covid lockdowns are also difficult to interpret in comparison to previous circumstances because cinemas and other arts and leisure venues were closed.

These first pandemic-period experiments with release strategies marked the beginning of a much longer period of trying and testing different strategies for the release of big-budget Hollywood studio films. Many of the previously delayed films were released when Covid restrictions became more relaxed in Europe and elsewhere. What is particularly striking is that the theatrical releases for such films were much more flexible than in pre-Covid times, and often significantly shorter. Even in the period after audience restrictions were lifted and cinemas were operating at full capacity, release strategies remained flexible in most European countries, as well as elsewhere. Early online releases have become increasingly common for big-budget releases, such as Warner's *The Batman* (Matt Reeves, 2022), Warner's *The Matrix Resurrections* (Lana Wachowski, 2021), and Universal's *Jurassic World Dominion* (Colin Trevorrow, 2022). In countries such as Spain, France, the Netherlands, Germany and the UK, these films played in cinemas for between six and eight weeks before they became available in the PVID window, a much shorter time that would have been the case before the pandemic.

Some Hollywood studios, such as Warner Bros and Universal Pictures, publicly announced in this period that they would commit to a shorter theatrical window for their films in the US and UK (Dalton et al. 2022). Among such agreements were partnerships between Hollywood studios and major cinema exhibition chains. In the UK market in 2021, for instance, Warner Bros and Universal Pictures negotiated a deal with the cinema chain Cineworld to establish 'an exclusive theatrical window of 31 days prior to PVID, and an extended window of 45 days for films that open to an agreed upon box office mark' (Tartaglione 2021). That window of between 31 and 76 days is much shorter than the average pre-Covid window of 109 days in the UK. Such windowing agreements between Hollywood studios and cinema chains in Europe and elsewhere, however, were fairly experimental and sometimes changed after a few months.

Another strategic direction that some Hollywood studios took during the pandemic was to invest significantly in content for their SVOD platforms, which were available in most countries worldwide. Walt Disney in particular invested substantially in Disney+, and arranged straight-to-Disney+ releases for some of their new big-budget releases, including *Pinocchio* (Robert Zemeckis, 2022).

With such a range of release strategies now in place, it is clear that Hollywood studio films circulate and reach audiences in a range of ways.

The cinema release window has shrunk smaller than ever before, partly because cinema exhibitors are not always able to impose strict rules on theatrical windows. That has resulted in concerns about the continuing value of the theatrical cinema market, and the role of Hollywood studio films therein, not least because such films account for the majority of cinema revenues in most European markets and elsewhere. The direct-to-streaming strategy in particular is widely perceived as a threat to cinema exhibition. Some industry observers, for instance, are worried that other Hollywood studios could follow the straight-to-SVOD strategy developed by Walt Disney. Eric Marti, General Manager of the data analytics company Comscore in France notes that: ‘They won’t release all their films on SVOD, but even if we are just talking about two to three movies a year from each studio, that’s 10 to 15 American movies a year missing from cinemas, which could mean 15 million lost admissions’ in France (Marti quoted in Roxborough 2022). Such concerns have increased tensions between Hollywood studios and cinema exhibitors, in Europe as much as elsewhere.

### RELEASING INDEPENDENT FILMS IN EUROPE DURING COVID-19

The pandemic also encouraged further experimentation with release strategies for independent films, although the releases of some independent films were inevitably postponed. For independent films that played in cinemas before they closed in early 2020, an early online release was once again a common strategy to capitalise on the publicity and exposure from the theatrical campaign, as well as to ensure that those films would remain accessible to audiences. The early online release was also a useful strategy because it was unclear how long cinemas would remain closed during the lockdowns and which films would be competing against each other when cinemas reopened.

On the other hand, there were concerns among independent distributors in Europe about the economic value of the online market for small, independent films. In Germany, for example, some independent distributors were sceptical about early online releases. Torsten Frehse, the Managing Director of distributor Neue Visionen in Germany, noted in July 2020 that some films work better in German cinemas than online, or vice versa, but that in general he was ‘amazed by the sometimes euphoric,

uncritical statements about online cinema releases, online festivals and online cinemas' (Frehse quoted in Schuster 2020).<sup>7</sup> He also notes that 'a simple calculation is enough to show that something is wrong or not in proportion' and that some distributors were 'suddenly very quiet when it comes to concrete results' (Frehse quoted in Schuster 2020).

Rather than providing early online releases for films, Neue Visionen and a few other art-house distributors in Germany decided to pause the releases of some of their films until cinemas reopened, and then organised cinema re-releases. Frehse notes that this strategy worked for the German release of the Saudi Arabian art-house film *The Perfect Candidate* (Haifaa Al-Mansour, 2019). Even though the lockdown was disruptive for the theatrical release of the film, it made a 'strong comeback' when cinemas reopened after the first wave of closures, being positioned 'right at the forefront in many cinemas' (quoted in Schuster, 2020). In other European countries too, the re-release was a strategy developed for independent films, particularly because Hollywood studio films were released early online, or directly online, or postponed, and that provided more opportunities for independent films in cinemas in the periods between lockdowns.

Another strategy developed for independent films during the Covid pandemic was direct-to-streaming releases, with some films initially becoming available in a premium VOD window, and others going directly to SVOD. For instance, the German independent distributor Salzgeber initially developed a theatrical release for the small-scale, German art-house film *Head Burst* (Savas Ceviz, 2019). But given uncertainties about the lockdown and the circumstances of the theatrical cinema market, the film was released straight away online in April 2020 on Salzgeber Club, Salzgeber's online TVOD platform (Ceviz in Müller 2020). Despite the direct-to-streaming strategy, Salzgeber also managed to develop a limited release when German cinemas re-opened, about four months after the film became available online, in August 2020. This release strategy thus challenges conventional wisdom about releasing a film in cinemas after it has been made available online. A similar example is the French film *Isadora's Children* (Damien Manivel, 2019), which was also intended for a theatrical release in Germany, but became directly available in March 2020 in a premium VOD window, this time on the virtual cinema TVOD platform Kino-on-Demand (Kijas in Silva 2020).

These various types of release strategies for independent films remained in place in the period from early 2020 to late 2022. Similar to the situation of many mainstream Hollywood studio films, much shorter theatrical

windows and early online releases became increasingly common for independent films, even when cinemas started to operate at full capacity again and many of the previously delayed films became available to exhibitors. For many exhibitors, the circumstances shifted in this period from an undersupply of films when cinemas initially re-opened, to an oversupply of films when lockdowns ended. It is important to bear in mind here that independent films account for a much higher number of film releases than Hollywood studio films and other mainstream films in cinemas. There was thus an enormous backlog of independent films waiting to be released after the various lockdowns.

In France, for example, the independent distributors association (SDI) estimated that the theatrical release of more than 400 independent films had been postponed in the first 13 months of the pandemic (Goodfellow 2021).<sup>8</sup> Some independent distributors called for ‘a coordinated, industry-wide plan to clear the backlog of hundreds of films that have missed scheduled releases as a result of the prolonged closures of French cinemas’ (Goodfellow 2021). In the end, this initiative to somehow centrally coordinate the theatrical release of independent films didn’t materialise because there were mixed opinions amongst distributors, given the vital importance of securing the optimum release date for a theatrical release. As one independent distributor stated: ‘There is no way we are going to give this decision away to anyone else, not even the CNC [the French film agency] or the Médiateur du Cinéma [a legal authority for the cinema exhibition sector in France]’ (Zana quoted in Silva 2021). Another independent distributor referred to competition between major and smaller distribution companies in France: ‘Major companies have no interest at all in these discussions because they have nothing to win’ and therefore ‘it is not a balanced situation’ (Bugeau quoted in Silva 2021).

Concerns about a backlog of unreleased independent films were also noticeable in other European countries, including the UK, Spain, Germany and the Netherlands. Many distributors turned to early online release strategies for independent films. The UK distributor Altitude, for instance, released the animated film *Where is Anne Frank?* (Ari Folman, 2021) in a limited number of cinemas on 12 August 2022, with an online PVOD release following just five weeks later. Another UK distributor, Signature, released the comedy *My Neighbor, Adolf* (Leon Prudovsky, 2022) in UK cinemas on 4 November 2022, with an online PVOD release just 10 days later. Alongside such early online strategies, distributors experimented with other release strategies, such as day-and-date and direct-to-streaming

releases. Amongst the examples of films released simultaneously in cinemas and online are the comedy *Good Luck to You, Leo Grande* (Sophie Hyde, 2022) by the Spanish distributor Vértigo Films, and the sci-fi film *Vesper* (Kristina Buozyte and Bruno Samper, 2022) by the UK distributor Signature. For the most part, though, day-and-date has remained an experimental strategy for distributors and cinema exhibitors in European countries.

### VIRTUAL CINEMA PLATFORMS

The pandemic played into the hands of streaming platforms, who were able to take advantage of cinema closures, straight-to-VOD and early online release strategies. Many well-established platforms reported that their sales revenues or subscriber bases had dramatically increased. For example, Netflix added close to 16 million subscribers worldwide in the first three months of 2020, when they had expected only 7.2 million subscribers before the pandemic (Alexander 2020). Also, the more specialised platform MUBI revealed that their subscriber base had significantly increased across the third week of March 2020, when the first cinema closures were enacted, by 52% in Italy, 34% in Ireland and 24% in the UK (Rosser 2020).

Alongside the popularity of such well-established platforms in Europe and elsewhere was the growing development of virtual cinema platforms. A virtual cinema platform, also known as a ‘home cinema’ or an ‘online cinema,’ is a streaming platform that is developed by, or for, cinema exhibitors, to complement their business and extend the ways in which they make films available to their customers. They thus enable cinema exhibitors to continue to benefit from film releases in the online market. Some virtual cinema platforms are established and owned by cinema exhibition chains. In the Netherlands, for example, the biggest, mainstream cinema chain, Pathé, established their own virtual cinema, Pathé Home (*Pathé Thuis* in Dutch), as early as 2011. They started small, but became the biggest player in the TVOD market in the country, with a collection of more than 4,000 films in 2022 (Pathé 2022).<sup>9</sup>

Other virtual cinema platforms are designed by individual cinema exhibitors or for collectives of small, individual cinema exhibitors. In most cases, films are shown in cinemas before they become available on virtual cinema platforms, as an extension of the cinema release. Virtual cinema platforms are often based on a transactional business model, whereby films

open in a PVOD window. This often means that those films become simultaneously available on other TVOD platforms. Occasionally, however, they become exclusively available on virtual cinema platforms before the online release opens up wider, for example, as part of day-and-date releases. The term ‘cinema VOD’ (CVOD) is sometimes used in the industry to describe that exclusivity for virtual cinema platforms in the PVOD market.

While a key characteristic of virtual cinema platforms is that they ensure that cinema exhibitors take part in the online release of films, there are other advantages. First, audiences are able to continue to support cinemas in the online market. Second, virtual cinema platforms provide an alternative to other types of TVOD platforms, including those with international operations. Third, there are opportunities to organise cross-marketing opportunities between cinema exhibitors and virtual cinema platforms. Cinemas can develop promotional activities in support of their virtual cinema platforms and vice versa. Fourth, virtual cinema platforms can gather data about online audiences and that data can be used to inform film programming in cinemas and related marketing activities. With these several characteristics in mind, it is worth noting that there can be huge differences between virtual cinema platforms. Some of them have large catalogues of thousands of films, while others work with smaller catalogues of hundreds of films. In addition, some of them appeal to audiences nationally, while others have regional or local reach. I discuss two examples of such virtual cinema platforms in detail in the remainder of this section.

The well-established UK film company Curzon has a long-standing reputation as an independent distributor and boutique cinema exhibition chain in the UK, but they also launched their own virtual cinema platform in the UK in 2010. It was first called ‘Curzon on Demand’ and subsequently rebranded as ‘Curzon Home Cinema’. Despite their expansion to the online market, Curzon conceives of their platform as an extension of their cinema exhibition chain, not the other way around (Knatchbull in Connex 2019). In fact, investment in their cinemas has been an increasingly important part of their business strategy in the years that followed, with their chain gradually growing from 5 cinemas in London in 2010 to 16 cinemas across England in 2022 (Curzon 2022).

Curzon is often recognised for their innovative approach to film distribution and exhibition. In addition to their virtual cinema platform, they are a long-term advocate of day-and-date release strategies for films (Robinson 2017). They are a distributor in the UK and Ireland of between



10 and 20 independent films every year, and most of these films are released day-and-date. Their virtual cinema platform is a key aspect of that strategy, particularly to exert control over the accessibility and visibility of their own films. While the online market as a whole offers a huge abundance of films, there is the risk that some films get lost in the noise and slide into obscurity (Smits 2022). Significant value is therefore placed on the visibility of films on VOD platforms. The Curzon platform provides access to a collection of several hundred films, but the special category ‘Curzon Film’ strategically appears at the centre of the homepage to draw attention to their own films.

The relationship between Curzon cinemas and the virtual cinema platform also enables cross-marketing and data opportunities. Data is particularly relevant to know what sort of audiences they reach. As the company’s managing director Philip Knatchbull explained in 2019, ‘What we are trying to do is gather our data from our customers and we can work out what our customers are interested in; what films at home and what films in the cinema’ (Knatchbull quoted in Connex 2019). And he notes elsewhere: ‘Most of our customers on Curzon Home Cinema are active cinemagoers who come maybe 10, 12 times a year to the cinema. And they are the biggest users of the Curzon Home Cinema platform as well’ (Knatchbull quoted in Connex 2019).

Curzon’s virtual cinema platform became increasingly valuable when cinemas in the UK closed during the pandemic. Already in the first weekend, Curzon reported an increase in online revenues, which grew by 347% compared to the same weekend in 2019 (Rosser 2020). Initiatives were also developed to anticipate changing circumstances, with new films being released directly on their virtual cinema platform, accompanied by a series of live screenings in combination with question and answer (Q&A) sessions with film directors to mimic aspects of the specialised theatrical experience and maintain customer loyalty (Knatchbull in Grater 2020).

Another example of a virtual cinema platform is Picl in the Netherlands. The platform mediates between independent distributors and cinema exhibitors to extend their partnership from the cinema market to the online market. It is designed to provide an online presence for independent cinema exhibitors by making a selection of their films available online. The concept is simple: when audiences watch a film on the platform, they can choose from a list of cinemas which one they want to participate in revenues generated from the online viewing.<sup>10</sup> That assures that the

cinema benefits economically from online viewings. There are currently close to 250 films available on the platform.

Picl was launched in 2015, but it initially proved challenging to develop partnerships with cinemas in the Netherlands and to convince them about the value of a collaboration with a streaming platform. Even though Picl was specifically developed for cinema exhibitors, and there are cross-marketing and data-sharing benefits, there was much resistance at first. Some cinema exhibitors continued to express a strong sentiment against streaming platforms. Exhibitors were particularly concerned about day-and-date release strategies for films. Some films were made available on Picl as part of conventional, staggered release strategies, but others became available as part of day-and-date release strategies. However, as managing director Anke van Diejen notes, research undertaken by Picl in 2016 demonstrated that their audience was mostly made up of cinema audiences that ‘cannot go to the cinema for various reasons,’ such as a ‘screening at an inconvenient time, film no longer showing in the cinema or not in a cinema nearby,’ and such findings became a “turning point for the exhibitors” (Diejen quoted in Europa Cinemas 2020). The company started partnerships with 6 cinemas in 2015, and that number then gradually increased to 14 cinemas in 2017 and 22 in 2020, prior to the pandemic (Diejen in Europa Cinemas 2020).

The lockdowns and cinema closures due to COVID-19 resulted in more partnerships with cinemas, which grew from 22 to 36 in the first three months of the pandemic (Diejen in Europa Cinemas 2020). It also resulted in an increase of film viewings on their platform: ‘Picl was going quite strong before the crisis and with the lockdown we had 6 times more views per week than usual’ (Diejen quoted in Europa Cinemas 2020). In terms of their film programming during the first waves of the pandemic, most films were given an early online release on Picl and other streaming platforms by independent distributors. But some films became exclusively available on Picl as CVOD releases, and only later on other streaming platforms because distributors ‘wanted to maintain exclusivity and support cinemas’ (Diejen quoted in Europa Cinemas 2020). In alignment with several other virtual cinema platforms, including Curzon, they also developed special initiatives to enrich the audience experience, such as introductions to films and Q&As. In 2021, Picl also launched in Belgium, where it developed partnerships with several more cinemas (Petkovic 2021).

The virtual cinema model, based on partnerships with independent cinemas, has also been developed in other European countries. It became

increasingly popular when cinemas were closed or operated at reduced capacity while Covid restrictions were in effect. Examples of such platforms include Kino on Demand in Germany, La Toile in France, YourScreen in the UK, MioCinema in Italy, Nettkino in Norway, Sala Virtual in Spain and Mojeekino in Poland, with most of these being supported by Creative Europe and/or national film agencies. Some of them were, like Piel, developed before the pandemic as a long-term solution for cinema exhibitors, while others were a short-term solution for cinemas when they were temporarily closed.

What I have demonstrated in this section is that there have been various initiatives in the independent sector of the market to bring cinemas and streaming platforms together. That is still a fairly experimental process, and there is of course competition from other TVOD platforms, as well as from SVOD platforms and AVOD platforms. But the initiatives that are being developed point to forms of collaboration between streaming platforms and cinema exhibitors, and this might be a future direction for the film exhibition sector.

### CONCLUSION: A TURNING POINT?

The analysis in this chapter has raised several points for further discussion. First, it remains important to think about the relationship between streaming platforms and cinema exhibitors in terms of conflict and tension. One question that was repeatedly asked during the pandemic was whether the changes to film release strategies that took place in that period should be understood as a turning point for the industry, or as an acceleration of processes that were already taking place. There is something to say for both. Flexible release strategies and shorter release windows are processes that were in development long before the pandemic, but those processes did indeed accelerate during the pandemic. At the same time, several Hollywood studios have become a part of the streaming revolution with their own SVOD platforms, and that has put further pressure on their relationship with cinema exhibitors, and particularly the most powerful exhibition chains during the pandemic. These Hollywood studios now have more bargaining power and control, in terms of how they release films, where, and for how long. That could be understood as a turning point for film distribution and exhibition in countries where windowing arrangements are more relaxed, such as the UK and the Netherlands. On the other hand, strict rules on the times between theatrical and SVOD

windows, such as in France, can have a restrictive impact on the power and control of Hollywood studios.

This development will continue to be a discussion topic in Germany, France, Spain, the UK and the Netherlands, as well as elsewhere in Europe and around the world. While the focus for theatrical cinema exhibitors will remain on protecting the theatrical window and cinema exhibition, we can expect arrangements to play out in different ways, perhaps with more countries turning to strict rules and policy interventions to regulate exhibition windows.

Second, it is also important to think about the relationship between streaming platforms and cinema exhibitors in terms of collaboration. Not everybody within the cinema exhibition sector has remained resistant to the streaming revolution. As I have demonstrated in relation to virtual cinema platforms in the UK and the Netherlands, some exhibitors are more progressive and have become a part of the streaming revolution, and there are other examples of collaboration with streaming platforms. Netflix, often regarded as the most disruptive SVOD platform, occasionally works with cinema exhibitors in several countries to release some of their films in cinemas for a short period of only two or three weeks before they become exclusively available on their platform. That again demonstrates that some cinema exhibitors are prepared to collaborate with streaming platforms. Such a perspective based on collaboration is often overlooked in academic discussions about film circulation, release strategies and streaming platforms, but deserves more attention.

## NOTES

1. It is worth noting, however, that a new law came into effect in January 2022 to develop other release strategies for publicly-funded films under exceptional circumstances (Blaney 2021).
2. See also the Chap. 1 by Ana Vinuela in this book.
3. Another strategy developed by Netflix is the so-called *near* day-and-date release strategy, whereby films play in cinemas for a few weeks before they become exclusively available on Netflix.
4. *No Time to Die* was eventually released in most countries worldwide in September 2021 and *Spider-Man: No Way Home* was released in most countries worldwide in December 2021.
5. All data about theatrical and online release dates in this chapter was collected from IMDb and individual TVOD platforms.

6. Amazon Prime and Apple TV offer transactional and subscription VOD services.
7. All quotes from Frehse have been translated from German to English by the author.
8. SDI stands for *Syndicat des distributeurs indépendants* in French.
9. Pathé Netherlands is part of the French production-distribution-exhibition consortium, Pathé Group, which also operates cinemas in France, Belgium, Senegal, Switzerland and Tunisia. The Netherlands is the only country in which they have a virtual cinema platform.
10. Picl is a non-for-profit organisation. They receive a fee for every ticket purchase.

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