

The Evolution of Cinematic Content Distribution in the Philippines (2017–2025)

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Abstract: This study examined the evolution of cinematic content distribution in the Philippines across three distinct phases: the pre-pandemic (2017–2019), pandemic (2020–2022), and post-pandemic (2023–2025) periods. Using a qualitative research design and narrative inquiry, the researchers analyzed how the industry navigated the disruptions and transitions caused by the global COVID-19 crisis. Data were collected through a systematic online literature review of academic studies, industry reports, and credible publications. The findings revealed that the pre-pandemic era was characterized by a theatre-anchored hybrid distribution system where mall-based theatrical exhibition remained dominant, though streaming platforms were already beginning to reshape viewing habits. The pandemic period served as a significant disruption, forcing widespread cinema closures and accelerating a rapid shift toward digital distribution and "quarantine cinema" through various local and international platforms. Finally, the post-pandemic period represented a new equilibrium where traditional theatrical exhibition coexisted with digital and hybrid models, resulting in a diversified ecosystem of cinematic access. This research provided valuable insights for scholars, filmmakers, and policymakers by documenting how the Philippine film industry adapted to technological advancements and crisis-driven change. The study concluded that while the pandemic caused severe initial declines in theatrical activity, it ultimately strengthened the role of digital platforms, creating a resilient, hybrid distribution landscape.

Keywords: Film Distribution, Philippines, COVID-19 Pandemic, Digital Streaming, Hybrid Distribution

I. Introduction

The distribution of cinematic content plays a central role in determining how films reach audiences and sustain the film industry. In the Philippines, distribution has traditionally relied on theatrical exhibition supported by established cinema networks and film distributors. Even before the pandemic, however, advances in digital technology and the growing presence of streaming platforms were already beginning to reshape global and local patterns of film distribution.

The disruption caused by the COVID-19 pandemic accelerated these changes. Lockdowns and the temporary closure of cinemas forced filmmakers and distributors to explore alternative channels such as video-on-demand services, streaming platforms, and online premieres. As a result, audience viewing habits shifted significantly toward home-based media consumption, prompting the industry to adapt rapidly to new distribution environments.

As restrictions eased and cinemas gradually reopened, the Philippine film industry entered a period of transition in which traditional theatrical releases began to coexist with digital and hybrid distribution models. In this context, the present study examined how cinematic content was distributed in the Philippines during three key periods: the pre-pandemic years (2017–2019), the pandemic years (2020–2022), and the post-pandemic years (2023–2025), in order to understand how distribution patterns evolved across these phases.

Objective

This study aimed to examine how cinematic content was distributed in the Philippines across three distinct periods: the pre-pandemic period (2017–2019), the pandemic period (2020–2022), and the post-pandemic period (2023–2025). Specifically, the study sought to analyze and describe the patterns, channels, and mechanisms of cinematic content distribution during these three periods in order to understand how distribution practices evolved in response to the disruptions and transitions associated with the global COVID-19 crisis.

Expected Benefits

The study was expected to benefit multiple stakeholders in the Philippine cinematic ecosystem by providing a clearer understanding of how film distribution evolved before, during, and after the pandemic. For scholars and researchers, it was anticipated to contribute empirical insights into shifts in media distribution practices during a major global disruption. Film producers and distributors were expected to gain insights into changing distribution channels, including the role of digital and hybrid platforms in reaching audiences. Policy makers and cultural agencies could use the findings to inform policies that strengthen the resilience of the local film industry in times of crisis. Educators and students in film and communication programs were also expected to benefit from the study as a contemporary case example of industry transformation. Overall, the study was expected to offer valuable perspectives on how the Philippine film distribution landscape adapted and evolved across three significant periods.

Literature Review

Film distribution is a crucial component of the motion picture industry because it determines how films reach audiences and generate revenue across various platforms. Traditionally, the global film industry relied heavily on theatrical exhibition as the primary channel for distributing cinematic content, with cinemas serving as the first window before films were released through other formats such as television, home video, and later digital platforms. Studies on film industry structures emphasize that distribution networks shape not only market access but also the economic sustainability of film production and exhibition sectors (Dadlani et al., 2024). Over time, technological innovations and evolving audience preferences have gradually expanded the range of distribution channels available to filmmakers and distributors.

In recent years, digital streaming platforms—commonly referred to as over-the-top (OTT) services—have significantly transformed the global film distribution landscape. Research shows that OTT platforms provide direct-to-consumer distribution channels that bypass traditional theatrical systems, allowing audiences to access films through internet-enabled devices (Zhongyu & Hashim, 2023). These platforms have also influenced film production and financing models by encouraging investment in original content and enabling new forms of audience engagement. As digital connectivity improves worldwide, streaming services continue to reshape how films are produced, distributed, and consumed.

The transformation of film distribution became particularly evident during the COVID-19 pandemic, when cinema closures and mobility restrictions disrupted traditional exhibition systems. In the Philippines, the film industry experienced severe declines in theatrical activity as cinemas remained closed for extended periods. As a result, production companies shifted toward digital distribution channels, including video-on-demand platforms, cable television, and online streaming services to sustain film releases and maintain audience engagement (Mercurio, 2021). This shift demonstrated the industry's capacity to adapt to crisis conditions while highlighting the growing importance of digital platforms in film circulation.

In the post-pandemic period, the Philippine film distribution environment has continued to evolve through a combination of theatrical revival and expanded digital access. The country's film industry now operates within a hybrid ecosystem where cinemas, streaming platforms, and digital distribution channels coexist. Increased internet connectivity, the growth of local streaming services, and the availability of international platforms have broadened audience access to Filipino films while also creating new distribution opportunities beyond domestic theaters. Recent industry reports indicate that streaming consumption and digital distribution have grown substantially in the Philippines, while cinemas have gradually recovered and adopted shorter theatrical release windows and hybrid distribution strategies.

Despite these developments, there remains a need for systematic analysis of how film distribution practices changed across the pre-pandemic, pandemic, and post-pandemic periods in the Philippine context. Much of the existing literature focuses either on global streaming trends or on the immediate impacts of the pandemic on the film industry. A comparative examination across these three phases can provide deeper insights into how the Philippine cinematic distribution system adapted to technological change and crisis conditions. Such analysis can contribute to a clearer understanding of the evolving structures of film distribution in the country.

II. Research Methodology

This study employed a qualitative research design to examine how cinematic content distribution in the Philippines evolved before, during, and after the COVID-19 pandemic. Qualitative research is appropriate for studies that aim to interpret complex social phenomena and understand how events and experiences are constructed through narratives and contextual meanings (Creswell & Creswell, 2018). In this research, narrative inquiry served as the primary qualitative approach because it allows researchers to interpret developments in the film industry through stories, experiences, and documented accounts of change over time. Narrative inquiry emphasizes contextual interpretation rather than numerical measurement, enabling researchers to examine how different perspectives contribute to understanding a phenomenon (Clandinin & Connelly, 2000). To support this approach, the study applied an online literature review method, analyzing existing academic studies, industry reports, and credible publications related to film distribution, media industries, and the effects of the pandemic on cinema.

The research used online sources, collecting data from reliable internet-based platforms and recognized academic repositories. Due to time constraints and the exploratory nature of the study, the researchers relied on secondary data sources, including peer-reviewed journals, books, scholarly articles, case studies, industry reports, and credible news publications discussing the Philippine film industry. Literature review-based research synthesizes and evaluates existing knowledge to identify patterns, theoretical insights, and research gaps relevant to a particular topic (Snyder, 2019). In this study, secondary materials were carefully selected based on their relevance, credibility, and alignment with the research focus. The scope of the analysis was limited to the transformation of cinematic content distribution in the Philippines across three periods: the pre-pandemic years (2017–2019), the pandemic years (2020–2022), and the post-pandemic years (2023–2025). These sources were organized and examined to identify recurring themes, emerging trends, and differing viewpoints that illustrate how the industry responded to the disruptions brought about by the pandemic.

Data collection was conducted through a systematic literature review, while the analysis employed deductive thematic analysis guided by narrative theory. Thematic analysis enables researchers to identify patterns and recurring themes across qualitative data sources (Braun & Clarke, 2006). In this study, themes related to distribution channels, audience behavior, and industry strategies were identified across the three periods of investigation. To structure the interpretation of these developments, the study incorporated the narrative framework proposed by Tzvetan Todorov, which outlines stages of equilibrium, disruption, response, and transformation (Todorov, 1977). Within this framework, the pre-pandemic period represented the equilibrium of traditional film distribution dominated by theatrical releases. The pandemic period represented the disruption,

characterized by cinema closures and the rapid expansion of digital streaming platforms. The industry's adaptation through online distribution and hybrid release strategies reflected attempts to resolve the disruption. Finally, the post-pandemic period represented the emergence of a new equilibrium in which theatrical exhibition and digital streaming coexist as complementary distribution models. Through this integrated analytical approach, the study aimed to provide a comprehensive account of how film distribution in the Philippines evolved from 2017 to 2025.

III. Research Results

How was cinematic content distributed in the Philippines in the three years of the pre-pandemic period from 2017 to 2019?

Cinema attendance in the Philippines during the pre-pandemic period remained modest, with traditional theatrical exhibition continuing as the primary mode of film distribution. Reports indicated that local cinemas, particularly mall-based chains such as SM, Ayala, and Robinsons, played a central role in controlling the reach and scheduling of film screenings. Box office revenues grew from approximately \$105.7 million in 2017 to \$144.5 million in 2019, reflecting continued commercial viability despite persistent challenges (Box Office Mojo, 2019; SM Cinema, 2018). Mainstream Filipino studios, including Star Cinema, Viva Films, and Regal Entertainment, relied heavily on these theatrical networks as well as seasonal events like the Metro Manila Film Festival to attract audiences.

During the same period, digital streaming platforms were beginning to reshape viewing habits. Netflix, which launched in the Philippines in 2016, provided local audiences with access to a wide array of international and local content, representing a significant shift in the landscape of film distribution (Calimag, 2017). Regional streaming services, such as iFlix, also expanded rapidly by partnering with local telecom providers, increasing accessibility for mobile-first viewers (Lancaster, 2019). The rise of these platforms demonstrated the gradual adoption of digital alternatives alongside traditional theatrical channels.

Independent and festival films played a complementary role in the distribution ecosystem. Festivals such as Cinemalaya and QCinema offered platforms for alternative narratives and emerging filmmakers, often serving as pathways for limited theatrical releases or subsequent licensing to streaming services (Campos, 2011). Films such as *Birdshot*, which gained recognition in international festivals before being acquired by Netflix, illustrate how festival circuits and streaming partnerships created parallel avenues for Filipino cinema to reach broader audiences. The pre-pandemic period can thus be described as a transitional phase, characterized by a **theatre-anchored hybrid distribution system**: theatrical exhibition remained dominant, but streaming platforms and festival circuits were establishing alternative routes for film circulation, laying the groundwork for the industry's response to future disruptions (Film Development Council of the Philippines, 2021).

How was cinematic content distributed in the Philippines during the pandemic period from 2020 to 2022?

The COVID-19 pandemic profoundly altered film distribution in the Philippines, primarily due to lockdowns and theater closures. Social distancing measures and public health restrictions forced cinemas to halt operations, which accelerated the shift toward digital platforms as the primary mode of content delivery (Changsong et al., 2021). During this period, online streaming services and digital distribution became essential for both mainstream and independent films, creating a new paradigm often described as "quarantine cinema" (Cabasal, 2021).

Several online platforms emerged or expanded to accommodate the changing audience needs. Upstream, a streaming service launched in 2020 by Globe Telecom, collaborated with film festivals such as the Metro Manila Film Festival and QCinema to make films accessible from home. Similarly, local platforms like iWantTFC and KTX grew in relevance as distributors adapted to digital and hybrid models, offering ticketed virtual screenings and short-term online releases in lieu of traditional theatrical windows (Damaual, 2021; Film Development

Council of the Philippines, 2021). Global platforms, particularly Netflix, also provided international exposure to Filipino films, enabling independent and festival cinema to reach broader audiences despite domestic restrictions (Seguerra, 2022; STHINT, 2021).

The pandemic period demonstrated the resilience and adaptability of the Philippine film industry. Digital technologies allowed content to remain accessible, while festivals and streaming collaborations ensured continuity in film circulation. Independent films such as *Birdshot* and *On the Job* benefited from this digital shift, gaining international attention through licensing to global streaming platforms (STHINT, 2021). Overall, film distribution during 2020–2022 reflects a **theatre-constrained, digitally mediated hybrid system**, where the traditional cinema's role was temporarily supplanted by streaming platforms, virtual screenings, and digital collaborations.

How was cinematic content distributed in the Philippines in the post-pandemic period from 2023 to 2025?

In the post-pandemic period, Philippine film distribution evolved into a **hybrid system** combining traditional theatrical exhibition with established digital platforms. By 2023, streaming services such as Netflix, iWant (formerly iWantTFC), and VivaOne (launched in 2023) had become permanent fixtures, offering local and international content through subscription and hybrid models (Media Meter, 2025). These platforms continued to expand their libraries and invest in original programming, reflecting ongoing audience demand for on-demand accessibility.

Cinemas experienced a partial recovery, particularly during major festival seasons. The Metro Manila Film Festival (MMFF) 2023 recorded higher gross receipts than previous years, indicating a renewed interest in theatrical experiences, though attendance remained below pre-pandemic levels due to factors such as ticket price increases and inflation (De Castro, 2024). Traditional multiplexes coexisted with digital distribution, reflecting a dual system where audiences could choose between home-based viewing and cinema-going.

At the same time, alternative and independent cinema continued to leverage emerging digital channels, including social media platforms like TikTok, for content distribution. The proliferation of mobile devices and streaming technology enabled independent filmmakers to produce and distribute films more cost-effectively, reaching younger audiences such as Gen Z who favor short-form content (Deocampo, 2024). Regional film festivals maintained their role in showcasing independent voices, contributing to a diversified distribution ecosystem. Overall, post-pandemic film distribution in the Philippines illustrates a **coexisting model** of theaters, streaming platforms, and digital-first channels, with consumption patterns increasingly shaped by technology, convenience, and lifestyle preferences (De Castro, 2024).

IV. Conclusion and Discussion

The data show that before the COVID-19 pandemic, the Philippine film industry relied heavily on traditional theatrical distribution, particularly mall-based multiplexes controlled by major local studios like Star Cinema, Viva, and Regal (Box Office Mojo, 2019; SM Cinema, 2018). Streaming platforms such as Netflix (launched 2016) and regional services like iFlix were present but not yet dominant (Calimag, 2017; Lancaster, 2019; Lim, 2023). Independent and festival films accessed audiences mainly through festival circuits such as Cinemalaya and QCinema (Campos, 2011). However, persistent challenges such as piracy, low theater attendance, and limited access to legal streaming options constrained audience reach and revenue (Seguerra, 2021; Film Development Council of the Philippines, 2021).

This data contributes to the research gap by providing an **empirical baseline** of distribution channels, audience behavior, and industry practices prior to the pandemic. While previous studies documented box office performance or streaming adoption in isolation, there has been limited research that synthesizes these dynamics over time to show **how pre-pandemic distribution patterns set the stage for later disruptions**. By mapping

the theater-dominant yet hybridizing environment, this study addresses the gap in understanding the structural vulnerabilities of the Philippine film distribution system before COVID-19.

During the pandemic, data indicate a rapid and forced shift toward digital platforms due to lockdowns and cinema closures (Changsong et al., 2021). Platforms like Upstream, iWantTFC, and KTX.ph facilitated virtual screenings and hybrid festival models, allowing films to reach audiences without physical theaters (Damaua, 2021; Film Development Council of the Philippines, 2021). Global streaming platforms such as Netflix provided international visibility for local independent films, demonstrating a new distribution pathway for festival and indie cinema (Seguerra, 2022; STHINT, 2021). The emergence of “quarantine cinema” represents an adaptive response by both distributors and audiences to unprecedented circumstances (Cabasal, 2021).

These data address a research gap by **documenting the first instance in the Philippines where digital-first distribution became mainstream**. While prior research discussed pandemic impacts on production or consumption, there was limited focus on **how distribution channels specifically adapted** to sustain film circulation. This study highlights how digital adoption accelerated during crises, providing insights into the resilience and flexibility of the Philippine film industry.

Data for the post-pandemic period show a hybrid system in which theaters and digital platforms coexist. Streaming services such as Netflix, VivaOne, and iWant dominate content access, while cinemas recovered gradually during festival seasons, though attendance remains below pre-pandemic levels (Media Meter, 2025; De Castro, 2024). Alternative cinema and short-form digital content on platforms such as TikTok have expanded, reflecting shifts in audience behavior and preferences (Deocampo, 2024; Regional festivals continue to play a role in supporting independent filmmakers, contributing to a diversified and resilient distribution ecosystem.

These findings contribute to the research gap by **demonstrating the structural transformation of film distribution in a post-pandemic context**. Previous literature focused primarily on pre-pandemic or pandemic trends separately, leaving a gap in understanding **how hybridization persists and shapes current consumption patterns**. This study provides a longitudinal perspective across pre-pandemic, pandemic, and post-pandemic periods, offering a **comprehensive view of evolving distribution models, audience adaptation, and industry strategies**, which is critical for both policy and academic purposes.

Collectively, the data fill a **longitudinal research gap** by tracing the evolution of cinematic content distribution in the Philippines from 2017 to 2025. The study highlights how pre-existing theatrical practices, pandemic-driven digital adaptation, and post-pandemic hybrid systems intersect to reshape audience behavior, revenue models, and industry practices. It provides a detailed empirical account that can inform both future research and practical strategies for sustaining the Philippine film industry in an increasingly digital environment.

Policy Recommendations

In essence, the study suggests that policies should focus on **sustaining hybrid distribution, supporting independent filmmaking, reducing piracy, enhancing technological adoption, and prioritizing audience engagement**. These measures collectively address the vulnerabilities identified across the pre-pandemic, pandemic, and post-pandemic periods, bridging gaps in access, revenue generation, and industry resilience.

Practical Recommendations

Overall, these practical recommendations focus on **flexible distribution strategies, expanded digital engagement, support for independent films, piracy mitigation, audience-centered marketing, and home-viewing enhancements**. By implementing these measures, stakeholders can adapt to the post-pandemic landscape, improve accessibility, and sustain the Philippine film industry amid evolving audience behaviors and technological advancements.

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