

The visibility of audiovisual works on TVOD

2020 Edition

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December 2020

A publication of the European Audiovisual Observatory



Co-funded by the
Creative Europe Programme
of the European Union



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Introduction and methodology

Introduction and methodology

This report is the 6th edition of the analysis of the visibility of audiovisual content on Transactional On-Demand (TVOD) services.

The data

- ▶ The underlying data used in this report has been provided by AQOA. AQOA systematically monitors the promotional spots on the homepage of the services, identifies the programme and associated metadata.
- ▶ The data provided by AQOA:
 - covers 7 EU27 countries (Belgium, Germany, France, Italy, the Netherland, Spain and Poland) and the United Kingdom. A further distinction is made between the services addressing the French-speaking (BEFR in the report) and the Flemish-speaking (BENL in the report) communities of Belgium;
 - includes 57 transactional video-on-demand services;
 - covers a full month of promotion by the TVOD services (October 2020).

Introduction and methodology

Definitions

- ▶ In this report, “**visibility**” means the mention of a piece of content on the home page of a service.
- ▶ A promotion spot is any space dedicated to the promotion of a piece of content on the home page of a service.
- ▶ “Films” in this report can be either :
 - “**Theatrical films**”, if they have been released in cinemas in at least one European country from the sample. However, theatrical films may not have been released in all countries included in this report.
 - “**Direct-to-VOD films**”, if they have not been released in cinemas in at least one European country from the sample.
- ▶ All other cases, content is defined as “TV content”. TV content mostly includes TV series.
- ▶ Please note that in some cases it is uneasy to assess whether a programme is a film or a TV film.
- ▶ The country of origin of a programme is the country from which the funding of a programme originates. When the programme has been funded by several countries, the country of origin is the country providing the highest share of the funding.
- ▶ A distinction is made throughout this report between:
 - the analysis by **titles**: each title (film or TV content) promoted at least once is counts as one, without taking into account the number of promotion spots. This approach is used to assess the number (and origin) of films or TV content which benefit from any level of promotion;
 - the analysis by **promotion spots**: the number of promotion spots for each film or TV content is taken into account here. This approach is used to assess the volume of promotion which is attributed to films and TV content according to their origin.

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Key findings

Key findings

The analysis of the visibility of films and TV content highlights the very characteristics of Transactional Video-On-Demand services (TVOD)

- ▶ TVOD's business model primarily relies on the sale or purchase of a limited number of recent high-commercial potential films. These high-commercial potential films are supplemented by a “long tail” offer of older films and TV shows, hardly promoted.
- ▶ High-potential films are “pushed” towards consumers through intensive promotion, whereas other programmes are made available for consumers looking for specific titles.

Access to visibility on TVOD is a very selective process

- ▶ Only a very small share of the catalogue (1 to 2% of titles) is promoted each month. And promotion is not distributed evenly between the titles which access promotion: out of about 1800 films which were promoted in October 2020, the 10 most promoted ones captured about 44% of all promotion efforts.

TVOD services dedicate the bulk of promotion to recent films

- ▶ 94% of promotion spots are dedicated to films, vs. only 6% for TV content, mainly TV series.
- ▶ 75% of film promotion spots go to recent films (produced in 2019 or 2020).

Different types of films

- ▶ Films promoted by TVOD services are mainly theatrical films, either released in cinemas in the service's country (87% of all films) or in another country of the sample (2%). The rest (11%) are direct-to-VOD (and also sometimes direct to DVD) films, not released in cinemas in any country of the sample.

No significant gap between the share of European works in catalogues and their share of promotion

- ▶ A relatively high share of EU27 or other European works ('other' refers to non-EU European Member States of the European Audiovisual Observatory) access promotion (26% and 39% of all titles promoted at least once, respectively).
- ▶ But each EU27 or European work is, on average, promoted less intensively than a US film.
- ▶ Therefore, EU27 and European works account for 18% and 37% of promotion spots.
- ▶ Of the 57 TVOD services in the sample, 31 had a share of promotion spots dedicated to European films above the 30% threshold.
- ▶ The share of European works is significantly higher for theatrical films than for direct-to-VOD films.
- ▶ In all countries but the United Kingdom and France, the majority of European works promotion spots go to non-national titles.

However, the promotion of European films is highly concentrated

- ▶ Whereas the top 10 most promoted films account, on average, for 44% of all promotion spots dedicated to films, the top 10 most promoted European films account for 76% of all promotion spots dedicated to European films.

But there are significant differences between the category of players

- ▶ On average, TVOD services with a multi-country presence tend to promote a lesser share of EU27 and European films: 11% and 25% of all promotion spots, respectively.
- ▶ And the promotion of European films is even more concentrated: the top 10 most promoted European films account for 84% of all promotion spots dedicated to European films.

Figures suggest that the share of promotion captured by European works is increasing

- ▶ Despite changes in the sample, figures suggest that the share of promotion spots dedicated to European works has increased from 23% in 2017 to 31% in 2020.

How is the content promoted?

How is the content promoted?

There are many different lay-outs of the home pages of the TVOD services, based on marketing options and technical constraints

▶ Generally speaking, the home page combines a general “welcome” section on the top of the page, and specific **sections**, organised under different concepts:

- Highlights
- Collections
- Most popular
- Genre (TV/Cinema)
- Exclusivities
- New releases
- Special deals
- Pre-order
- Etc.

Sections may be dedicated to personalised recommendations based on consumption history. They are not taken into account in this report.

- ▶ The services in the sample use on average **10 different sections**.
- ▶ Each section can be static or can be scrolled horizontally and therefore include several “spots” – up to 32 .
- ▶ On average, the services of the sample have about **40 spots** to promote titles, ranging from 2 to 76. Titles can be changed on a daily basis.
- ▶ On average, about 5% of the spots are used for “operations”, i.e. the promotion of a package of titles. The remaining spots are dedicated to individual titles.

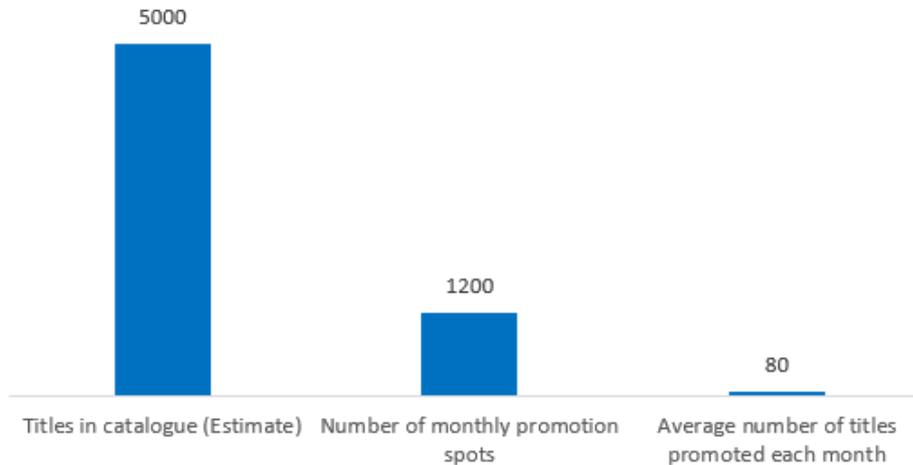
Which content is promoted?

Which content is promoted?

Only a very minor part of catalogues is/can be promoted

- ▶ On average, a TVOD service proposes about 1 200 promotion spots during a given month.
- ▶ On average, these promotion spots are used to promote about 80 different titles (films and TV content) during a given month, i.e. about 1 to 2% of the total catalogue.

Size of catalogues and number of promotion spots and promoted films per month (in units, October 2020)



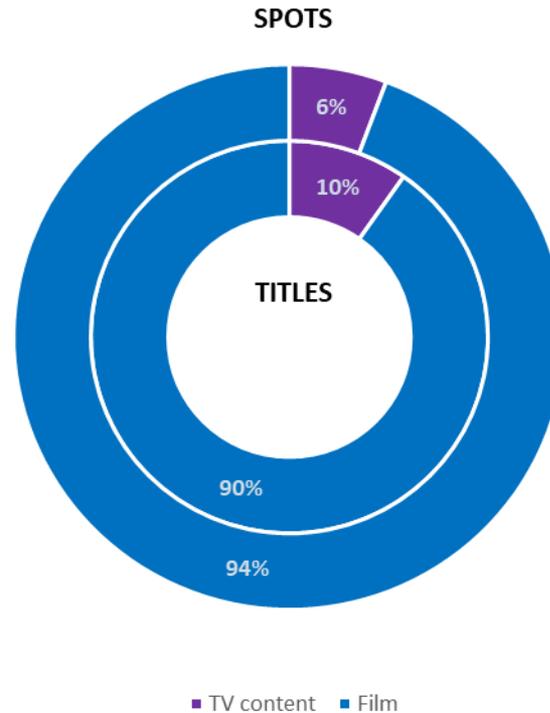
Source: European Audiovisual Observatory analysis of AQOA data

Which content is promoted?

TVOD services dedicate the bulk of promotion to films

- Films account for 90% of titles promoted at least once and for 94% of all promotion spots. TVOD is indeed driven by the sale or purchase of films, as TV content has often been previously broadcast on TV (except for simultaneous releases of US TV series in Europe) and therefore lacks the novelty (and also notoriety) of films.

Breakdown of titles promoted and promotion spots between film and TV content (% , October 2020)



How to read this graph: films represent 90% of titles which are promoted at least once and 94% of promotion spots

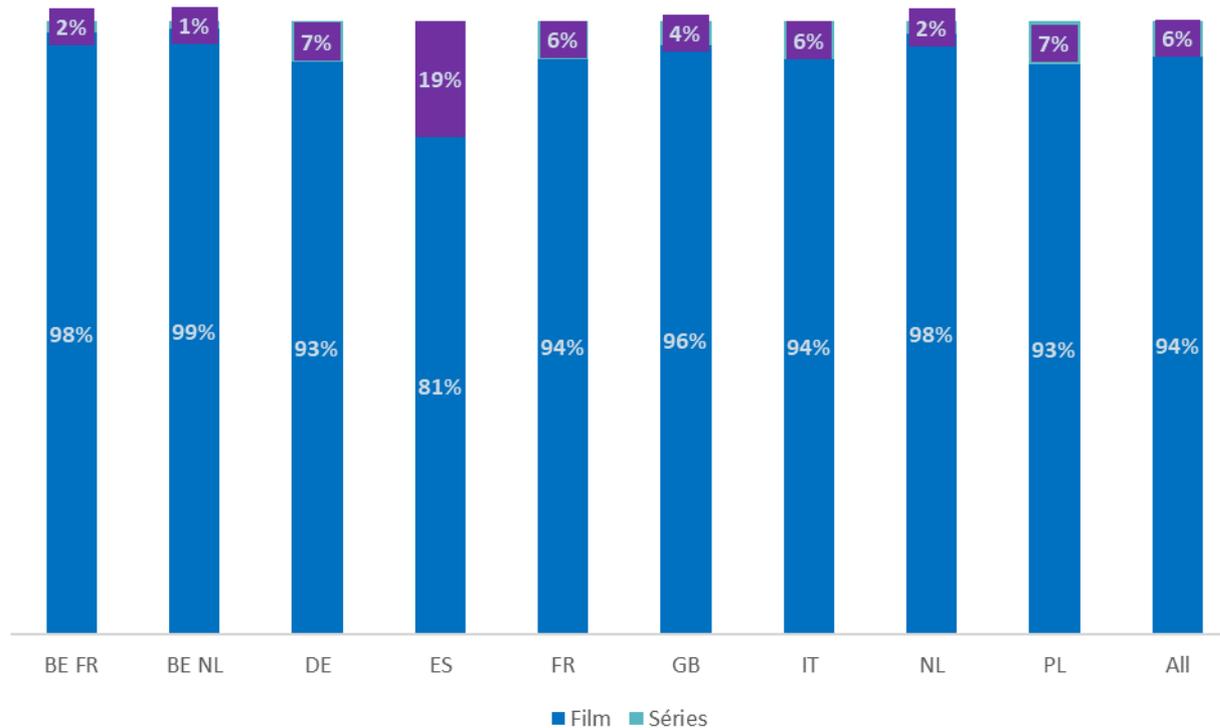
Source: European Audiovisual Observatory analysis of AQOA data

Which content is promoted?

More TV content promoted in Spain

- ▶ The promotion of TV content is marginal in most countries, with the exception of Spain, where it accounts for 19% of all promotion spots.

Breakdown of promotion spots between film and TV content
(%, October 2019)



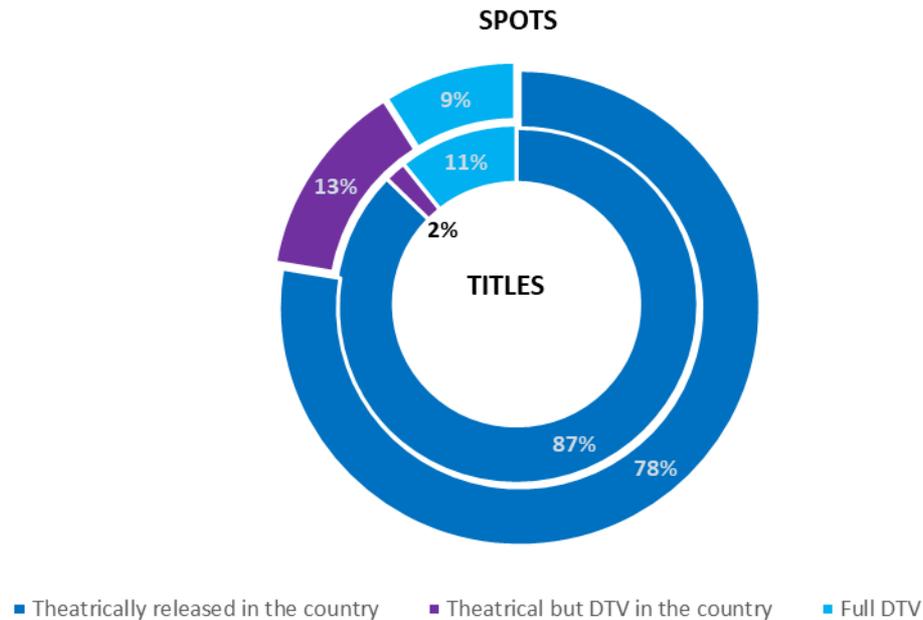
Source: European Audiovisual Observatory analysis of AQOA data

Which content is promoted?

TVOD services source primarily theatrical films

- Films theatrically released in the country are the prime source for films. The catalogue is complemented by either films theatrically released in another country but not in the service country, or by “Full Direct-to-VOD” films, i.e. films with no theatrical release in any of the countries monitored in this report.

Breakdown of films between theatrical and non theatrical
(%, October 2020)



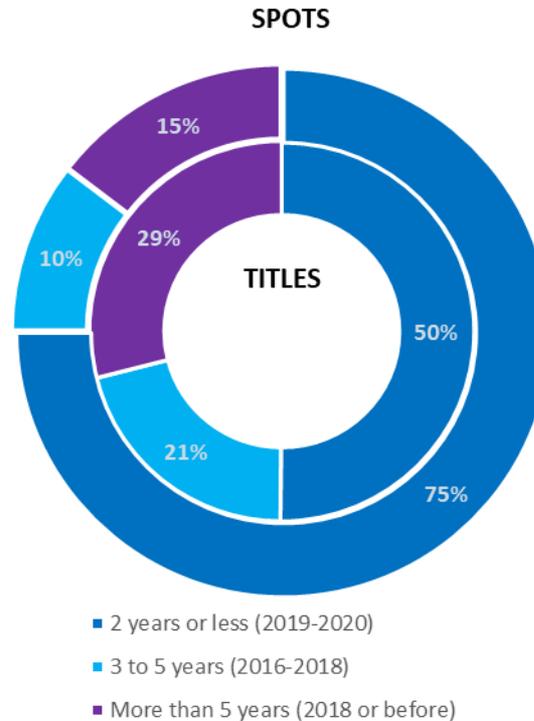
Source: European Audiovisual Observatory analysis of AQOA data

Which content is promoted?

The promotion efforts of the TVOD services massively benefit recent films (2 years or less)

- ▶ Films produced in 2018 and 2019 represented 50% of all films promoted and 75% of promotion spots.
- ▶ When promoted, recent films are more intensively promoted than other films.

Breakdown of films promoted and promotion spots by age of title (% , October 2020)



How to read this graph: films aged 2 years or less represent 50% of films which are promoted at least once and 75% of promotion spots

Source: European Audiovisual Observatory analysis of AQOA data

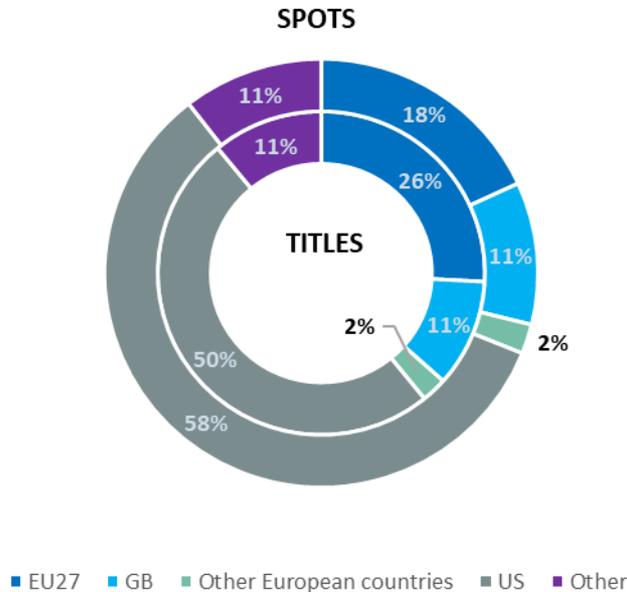
What is the origin of the content promoted?

What is the origin of the content promoted?

The share of promotion captured by European works (31%) is similar to their share of TVOD catalogues (33%).

- ▶ EU27 works account for 26% of films promoted at least once (39% for all European works).
- ▶ But the share of EU27 works promoted at least once (26%) is lower than their share of promotion spots (18%), as US titles are present in more countries and services and therefore benefit from more promotion. The same applies to all European works.
- ▶ The UK films alone account for 11% of all European works promotion spots.
- ▶ The share of promotion spots captured by European works is only marginally higher (32%) when considering only EU27 services (i.e. excluding UK services)

Breakdown of works promoted and promotion spots by origin (% , October 2020)



How to read this graph: EU27 titles account for 26% of titles promoted at least once and for 18% of promotion spots

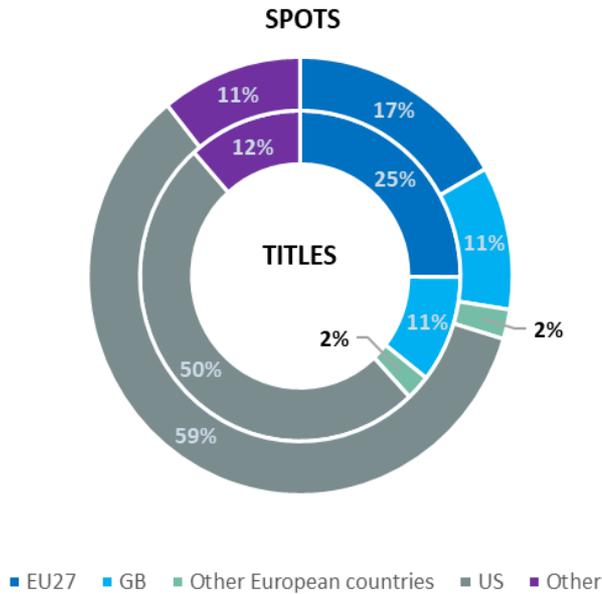
Source: European Audiovisual Observatory analysis of AQOA data

What is the origin of the content promoted?

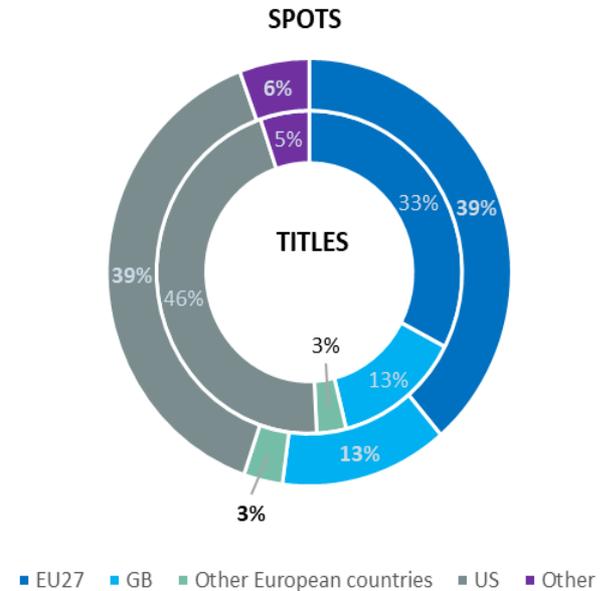
The share of European works promoted is higher for TV content than for films

- ▶ Taking into account all works promoted, TV content only represents a small minority (6%).
- ▶ But European TV content gets 39% of all promotion spots dedicated to TV content, whereas European film only gets 30% of all promotion spots dedicated to films.

Breakdown of films
promoted and promotion spots by origin (% , October 2020)



Breakdown of TV content
promoted and promotion spots by origin (% , October 2020)

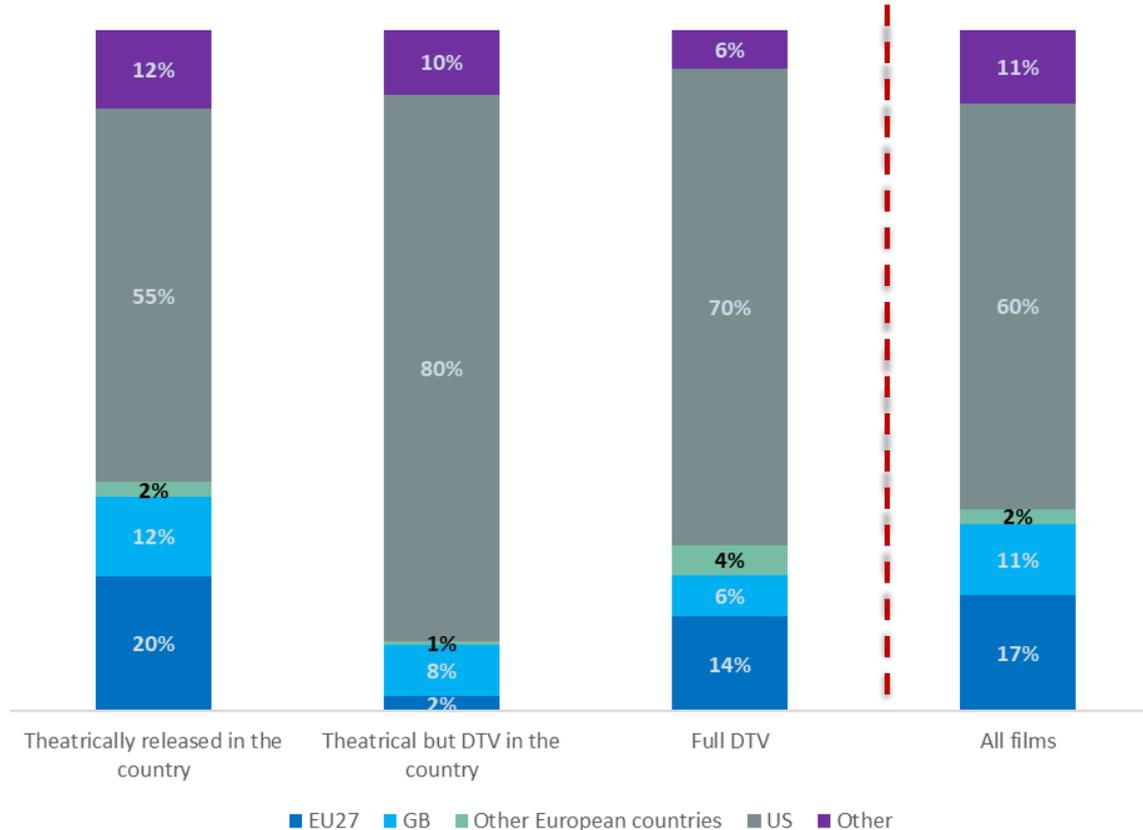


What is the origin of the content promoted?

The share of EU27 and European films is higher among films theatrically released in the country

- ▶ Films theatrically released in the country represent the bulk of promotion spots dedicated to films (75% of all film spots).
- ▶ It's also among films theatrically released in the country that the highest share of European works is found.

Breakdown of film promotion spots by category of films and origin (% , October 2020)

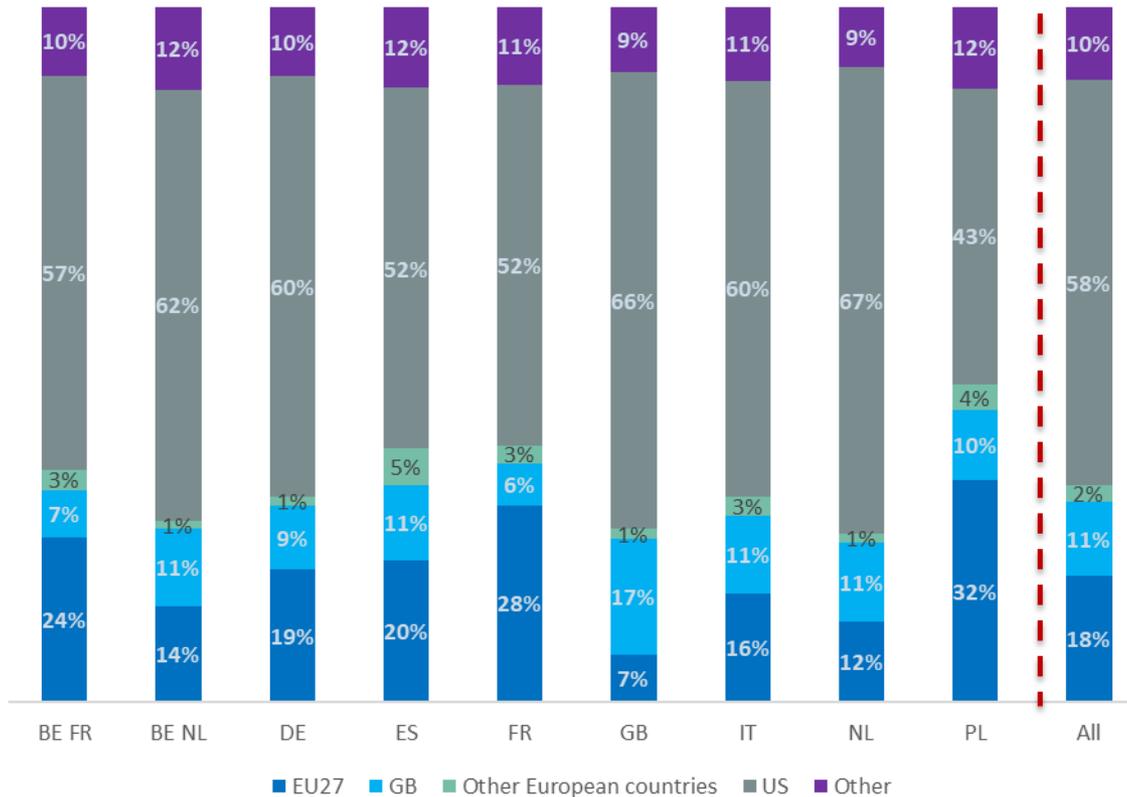


What is the origin of the content promoted?

Poland, France and Spain promote more European works

- ▶ Poland's TVOD services dedicate 46% of film promotion spots to European films. France and Spain also promote European films more than the average sample country.
- ▶ The lowest EU27 share of promotion spots is found in the UK, the Netherlands and in Dutch-speaking Belgium.

Breakdown of promotion spots by origin and country (% , October 2020)



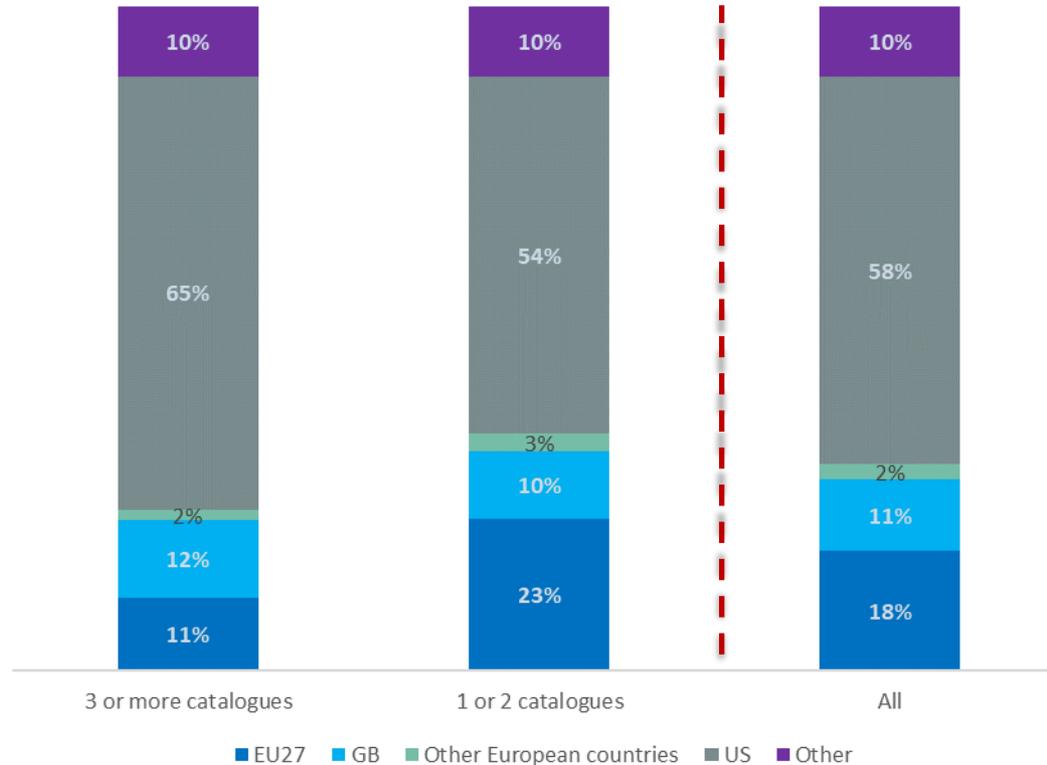
Source: European Audiovisual Observatory analysis of AQOA data

What is the origin of the content promoted?

Services with a multi-country presence grant fewer promotion spots to EU27 and European titles

- ▶ EU27 titles account for 11% of promotion spots for multi-country services vs. 23% for national services.
- ▶ Among European works, the share of promoted GB works is similar for all categories of TVOD services.

Origin of promotion spots by category of service (% , October 2020)



3 or more catalogues in the sample: iTunes, Google Play, Xbox Live and PS Store

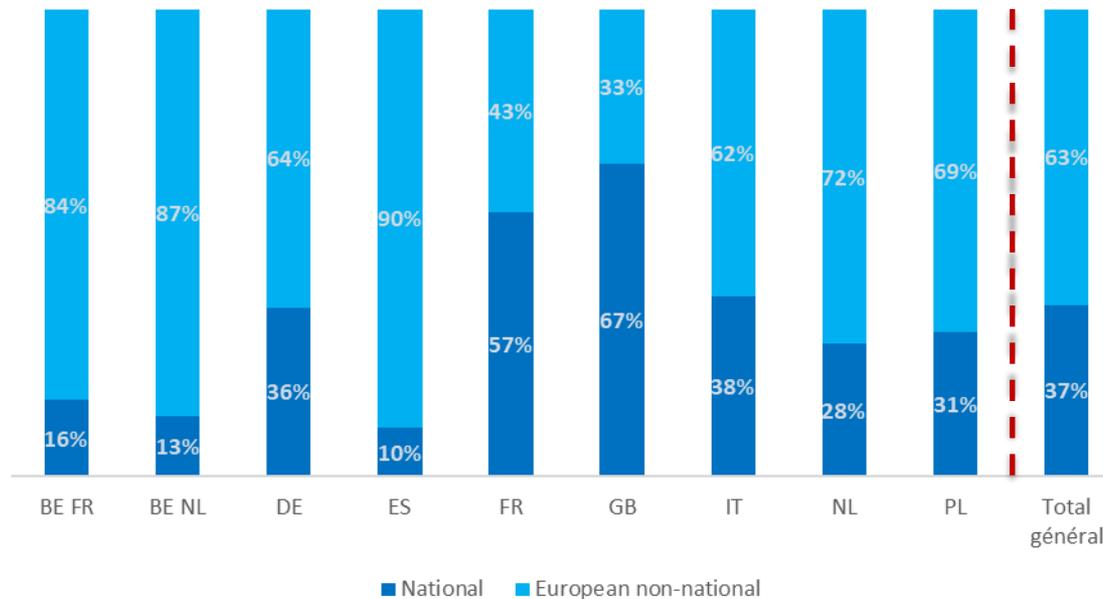
Source: European Audiovisual Observatory analysis of AQOA data

What is the origin of the content promoted?

A clear majority of European non-national works among European works promoted

- ▶ On average, European non-national titles account for 63% of European promotion spots.
- ▶ The share of national titles among promotion spots is however higher than on average in the largest production countries (France, United Kingdom and, to a lesser extent, Italy and Germany).

Breakdown of European promotion spots by national and European non-national (% , October 2020)



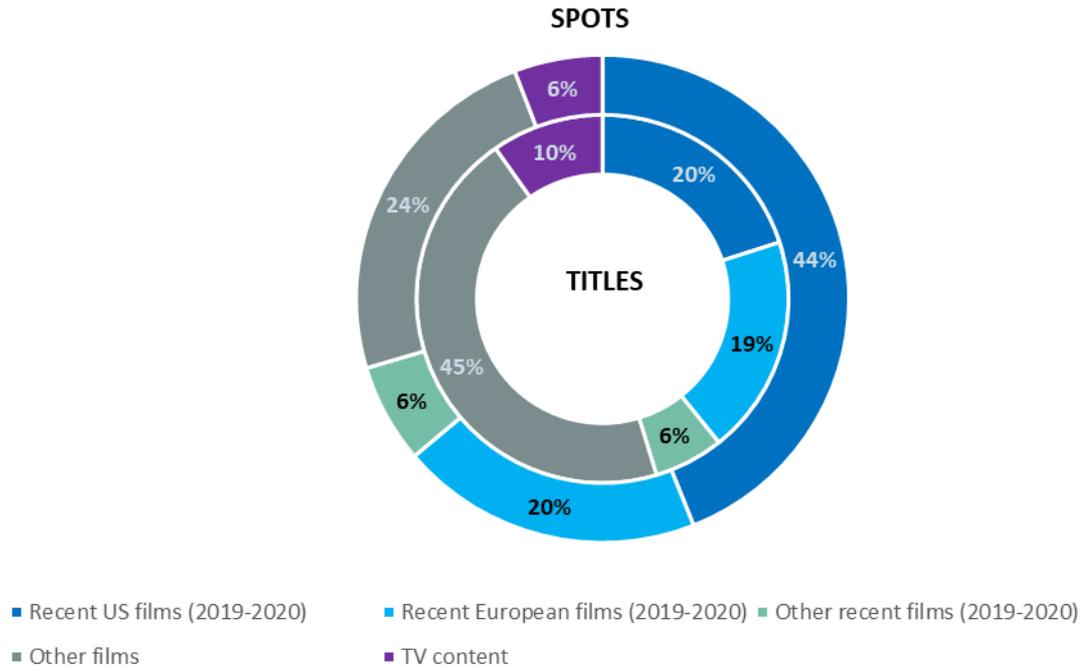
Source: European Audiovisual Observatory analysis of AQOA data

What is the origin of the content promoted?

Synthesis: 44% of promotion spots go to recent US films

- ▶ Combining the age and origin of titles shows the prominence of recent US films.
- ▶ The difference in the share of titles promoted and share of promotion spots reflects the fact that the same US films are present – and therefore promoted – in several territories.

Origin of promotion spots by age and origin (% , October 2020)



Source: European Audiovisual Observatory analysis of AQOA data

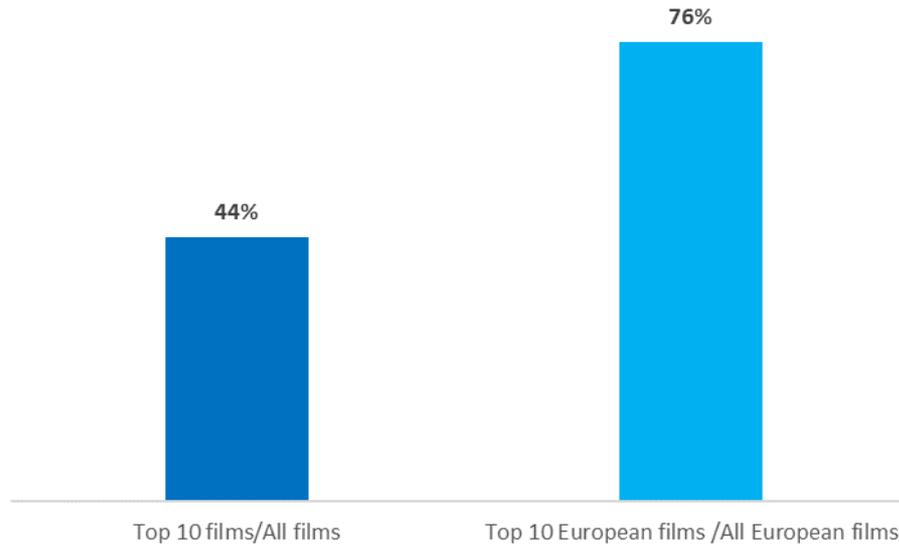
How concentrated is the promotion?

How concentrated is the promotion?

The top 10 promoted films benefit on average of 44% of promotion spots

- ▶ The concentration of promotion among European films is significantly higher (76%) than for films of all origins (44%).

Average share of promotion spots for the top 10 promoted titles
(%, October 2020)



Note: These figures are averages *per service*. The share of the top 10 can be significantly lower at the country level or for all territories as more titles are promoted

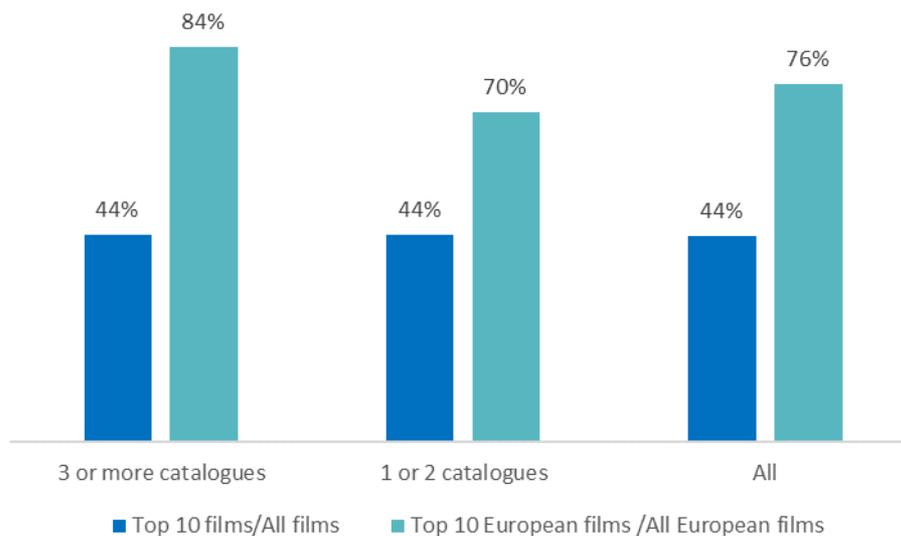
Source: European Audiovisual Observatory analysis of AQOA data

How concentrated is the promotion?

Promotion of European films is more concentrated in multi-country services than in national services

- ▶ However, the level of concentration is the same for films on average.

Average share of promotion spots for the top 10 promoted titles by category of services (% , October 2020)



Note: These figures are averages *per service*. The share of the top 10 can be significantly lower at the country level or for all territories as more titles are promoted

3 or more catalogues in the sample: iTunes, Google Play, Xbox Live and PS Store.

Source: European Audiovisual Observatory analysis of AQOA data

How concentrated is the promotion?

No European film in the top 10 most promoted films. 4 out of the 10 most promoted European films are coproductions with the US.

Top 10 promoted titles (October 2020; all territories)

Title	Year	Origin	Genre	Number of country/region where promoted	Number of promotional spots
Mulan (2020)	2020	US, CA, HK	1406	32	6
Scooby	2020	US	1141	32	6
The Hunt	2020	US, JP	811	26	6
The Invisible Man	2020	CA, AU, US	798	28	8
Nightmare Island	2020	US	777	29	8
Bad Boys For Life	2020	US, MX	672	25	8
Deep Blue Sea 3	2020	US	656	30	7
Sonic The Movie	2020	US, JP, CA	604	27	7
Ava	2020	US	586	15	4
The Gentlemen	2019	US, GB	534	17	6

Top 10 promoted European titles (October 2020; all territories)

Title	Year	Origin	Genre	Number of country/region where promoted	Number of promotional spots
La bonne épouse	2020	FR	352	5	3
Harry Potter and the Sorcerer's Stone	2001	GB, US	291	8	6
Eternal Beauty	2019	GB	283	8	1
Pinocchio	2019	IT, FR, GB	258	5	1
Filles de joie	2020	BE, FR	251	5	1
The High Note	2020	GB, US	247	8	1
De Gaulle	2020	FR	241	4	1
How to Build a Girl	2019	GB	232	7	5
Waiting for the Barbarians	2019	IT, US	209	6	1
The Postcard Killings	2020	GB, US	205	4	3

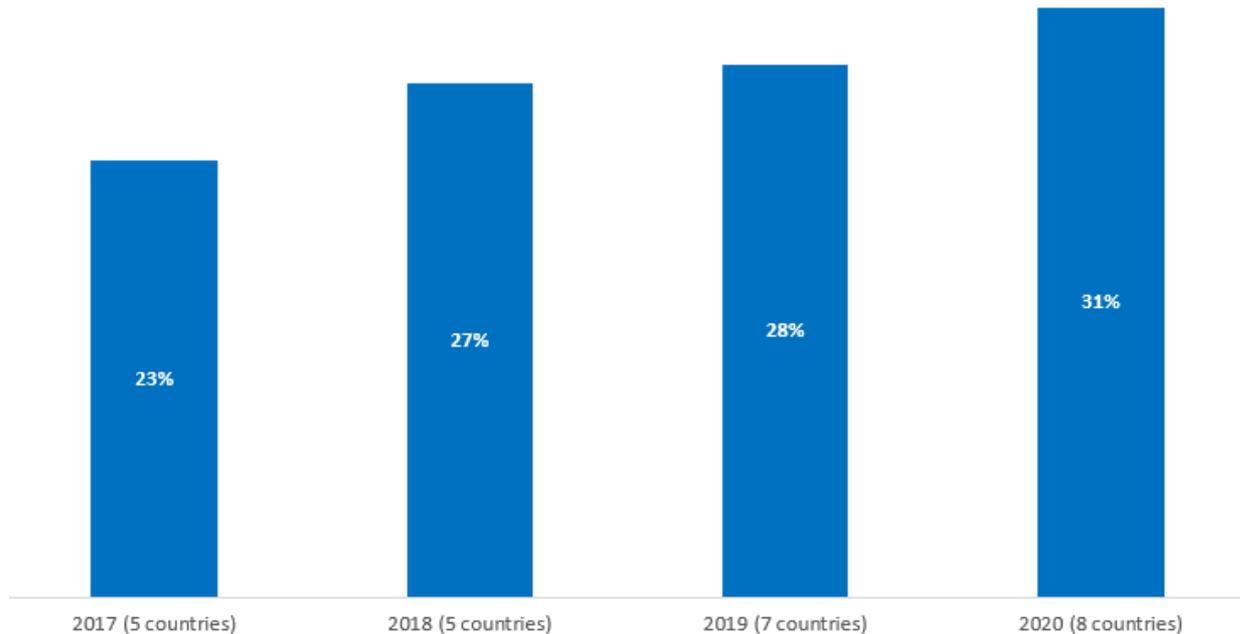
Any trend in the European works' share of promotion spots?

Any trend in the European works' share of promotion spots?

The European works' share of promotion spots seems to increase

- ▶ The sample countries and services have significantly increased over time. Still, TVOD services seem to dedicate more space to the promotion of European works.

European works' share of promotion spots (% , 2017-2020)



Source: European Audiovisual Observatory analysis of AQOA data

Annex: list of services in the sample

Sample: 57 services from 9 countries/territories

List of services in the sample

BE (French Speaking)
GOOGLE PLAY
iTUNES
Proximus.be
VOO EVASION
XBOX ONE
BE (Dutch Speaking)
Google Play
iTUNES
Proximus.be
TELENET - FILMS A LA CARTE
XBOX
Germany
AMAZON INSTANT VIDEO
GOOGLE PLAY
iTUNES
MAXDOME
PS STORE
SKY
UNITY MEDIA
VIDEOCIETY
VIDEOLOAD
XBOX LIVE
Spain
FILMIN
ITUNES
MOVISTAR+
RAKUTEN

France
BBOX
Canal VOD
FREEBOX
GOOGLE PLAY
iTunes
MYTF1 FREEBOX
Numericable
ORANGE
PLUZZ
PS STORE
SFR CanalVOD
XBOX LIVE
United-Kingdom
AMAZON
BT
GOOGLE PLAY
ITUNES
PS STORE
SKY STORE
VIRGIN
XBOX
Italy
CHILI
GOOGLEPLAY
ITUNES
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iTUNES
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ZIGGO
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