

The visibility of audiovisual works on TVOD

2019 Edition

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Introduction and methodology

Introduction and methodology

This report is the 5th 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 European countries: Belgium, Germany, France, Italy, the Netherlands, Spain 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 52 transactional video-on-demand services;
 - covers a full month of promotion by the TVOD services (October 2019).

Introduction and methodology

Definitions

- ▶ In this report, “**visibility**” means the mention of a content in the home page of a service.
- ▶ A promotion spot is any space dedicated to the promotion of a content on the home page of a service.
- ▶ A programme is a film if it has been released in cinemas in at least one European country. All other content is defined as “TV content”. Please note that in some cases it is not easy 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 **title**: each title (film or TV content) promoted at least once is accounted for as one, without taking into account the number of promotion spots. This approach is used to assess the number (and origin) of films which benefit from any level of promotion.
 - the analysis by **promotion spots**: the number of promotion spots for each film 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.
- ▶ In this report, “EU28” refers to the 28 member states of the European Union before the withdrawal of the United Kingdom from the EU. The United Kingdom data is included in the report as the reference period is prior to the withdrawal.

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Key findings

Key findings

Access to visibility on TVOD is a very selective process

- ▶ In this report, visibility is defined as the presence on the home page of a TVOD service.
- ▶ On average, each service of the sample has 40 promotion spots to promote titles, which can be changed on a daily basis.
- ▶ On average, in October 2019, each service promoted 89 different films, i.e. between 1 and 2% of the total catalogue.
- ▶ On average, each title was promoted 13 times (i.e. present 13 times in a promotion spot during a given day).

▶ TVOD services dedicate the bulk of promotion to recent films

- ▶ 92% of promotion spots go to films, and 8% to TV content, i.e. less than the share of TV titles in catalogues.
- ▶ 84% of film promotion spots go to recent films (produced in 2018 and 2019).

▶ Cumulatively, EU28 titles account for 24% of promotion spots

- ▶ Out of the 89 different titles promoted by an average TVOD service in October 2019, 31% were of EU28 origin and 51% of US origin.
- ▶ Each of the US films promoted benefitted from more promotion spots (16) than EU28 titles (10).
- ▶ Cumulatively for all services of the sample, US and EU28 films benefitted from 61% and 24% of all promotion spots, respectively.
- ▶ Cumulatively for all services of the sample, the share of EU titles, of those promoted at least once, was much higher (37%), which reflects the fact that the same US titles were present in more countries and services and therefore benefitted from more promotion.
- ▶ In all countries but France, the majority of EU28 titles promotion spots went to non-national titles.

The EU28 share of promotion varies by country, genre and type of players

- ▶ The EU28 share of promotion spots was the highest in Spain and France, and the lowest in the UK.
- ▶ The EU28 share of promotion spots was higher for TV content than for films.
- ▶ The EU28 share of promotion spots was lower for multi-country services than for national services.

▶ Promotion is concentrated around a very limited number of titles, and is even more concentrated for EU28 titles

- ▶ On a service basis, among the titles which were promoted at least once, the top 10 titles accounted on average for 41% of all the promotion spots.
- ▶ Concentration was significantly higher for EU28 films: the top 10 accounted for 59% of all EU28 promotion spots.
- ▶ Concentration was significantly higher for EU28 films in multi-country services.
- ▶ Promotion benefitted a limited number of titles and only a few of them benefitted from a large promotion effort.

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**, organized under different concepts:
 - ▶ Highlights
 - ▶ Collections
 - ▶ Most popular
 - ▶ Genre (TV/Cinema)
 - ▶ Exclusivities
 - ▶ New releases
 - ▶ Special deals
 - ▶ Pre-order
 - ▶ Etc.

Sections may be dedicated to personalized 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.

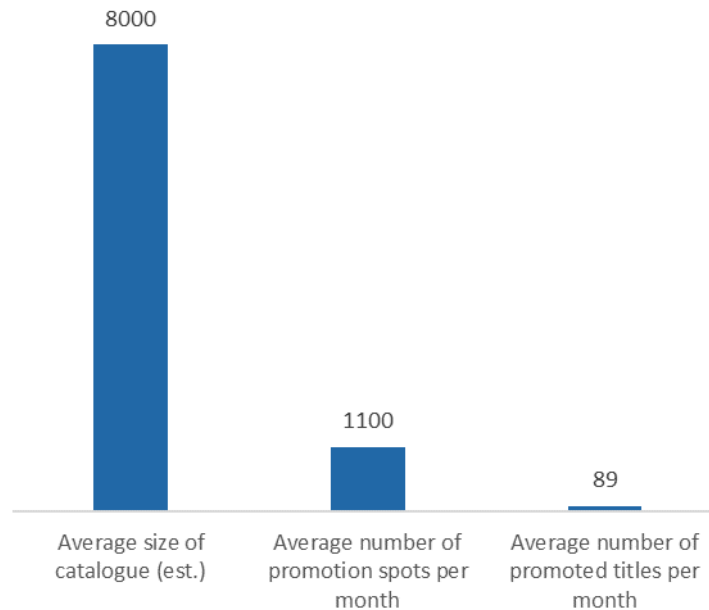
Which content is promoted?

Which content is promoted?

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

- ▶ On average, a TVOD service proposes about 1000 promotion spots during a given month
- ▶ On average, these promotion spots are used to promote about 90 different films during a given month, i.e. about 1% of the total catalogue.

Size of catalogues and number of promotion spots and promoted films per month (unit, October 2019)



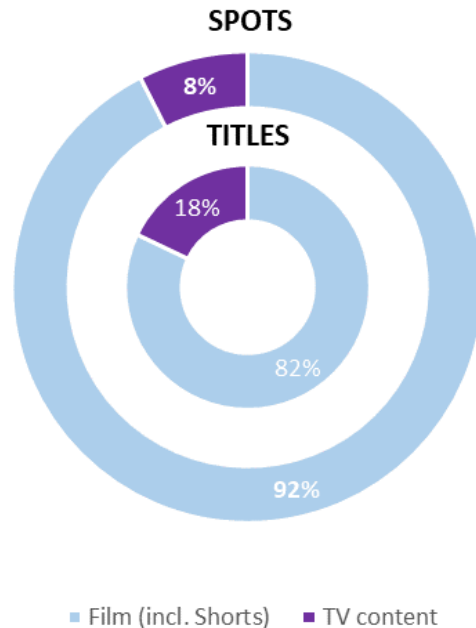
Source: European Audiovisual Observatory analysis of AQOA data

Which content is promoted?

TVOD services dedicate the bulk of promotion to films

- ▶ The TV content share of promotion spots (8%) is lower than the share of TV content in TVOD catalogues (13%, measured in number of titles, not in number of episodes).

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



How to read this graph: films represent 82% of titles which are promoted at least once and 92% of promotion spots.

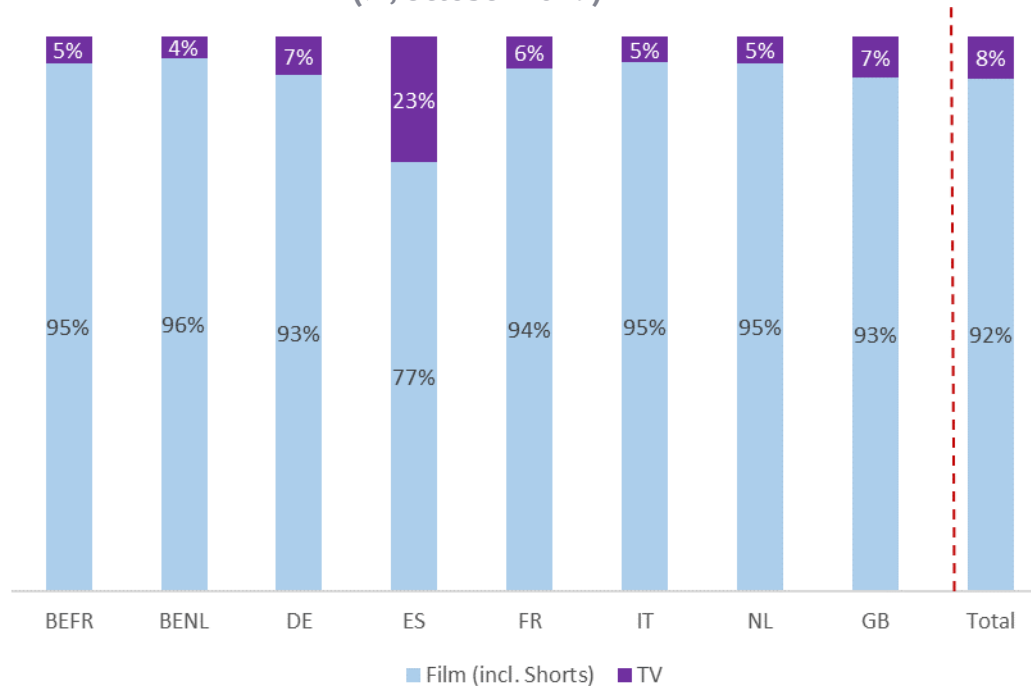
Source: European Audiovisual Observatory analysis of AQOA data

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 23% of all promotion spots.

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



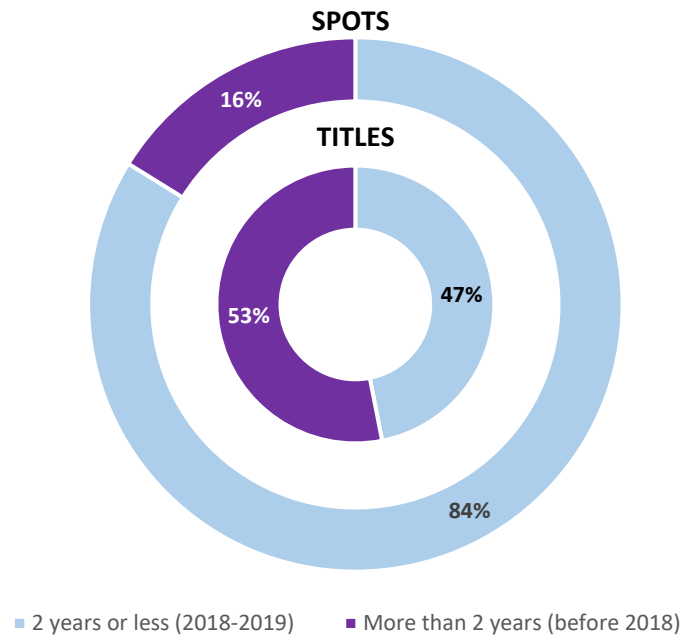
Source: European Audiovisual Observatory analysis of AQOA data

Which content is promoted?

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

- ▶ Films produced in 2018 and 2019 represented 47% of all films promoted and 84% 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 2019)



How to read this graph: films aged 2 years or less represent 47% of films which are promoted at least once and 84% of promotion spots.

Source: European Audiovisual Observatory analysis of AQOA data

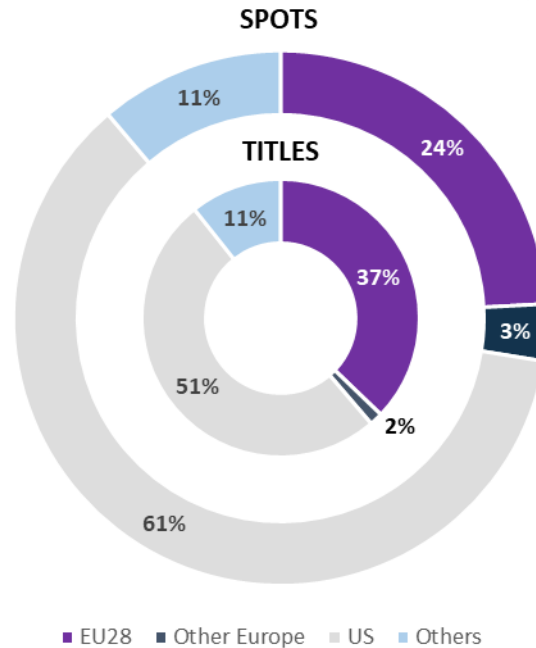
What is the origin of the content promoted?

What is the origin of the content promoted?

EU28 titles benefit from 24% of all promotion spots

- ▶ The share of promotion spots for EU28 (24%) titles is lower than the global share of EU28 works in TVOD catalogues (30%). But the difference could be explained by the limited sample used for the analysis of visibility, focused on mainstream services.
- ▶ When considering aggregated figures, EU28 titles represent 37% of all titles promoted at least once, but 24% of promotion spots. This reflects that US titles are present in more countries and services and therefore benefit from more promotion.

Breakdown of films promoted and promotion spots by origin (% , October 2019)



How to read this graph: EU28 titles account for 37% of titles promoted at least once and for 24% of promotion spots.

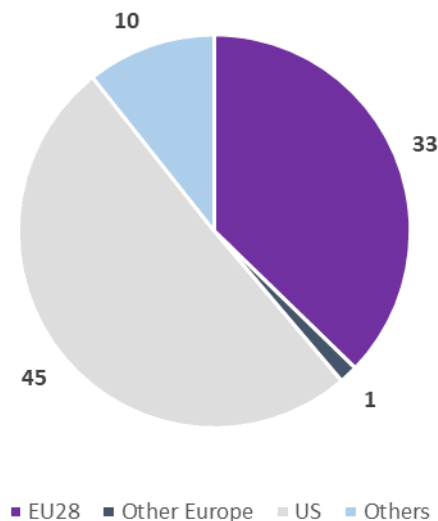
Source: European Audiovisual Observatory analysis of AQOA data

What is the origin of the content promoted?

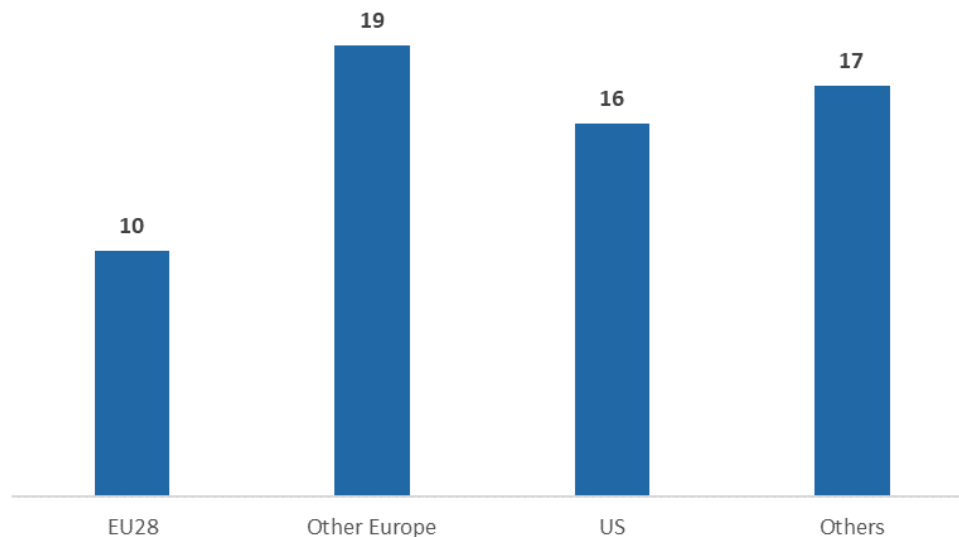
On an average TVOD service, a promoted US film benefits from more promotion spots than EU28 films

- ▶ On average, TVOD services promote many more different US films, with a higher number of promotion spots per film.

Average number of different films promoted by a TVOD service by origin (unit, October 2019)



Average number of spots per title and origin (unit, October 2019)



Note: These figures are averages *per service*. Averages per title can be significantly higher at the country level or for all territories, as a given title can be promoted by several titles in several territories.

Source: European Audiovisual Observatory analysis of AQOA data

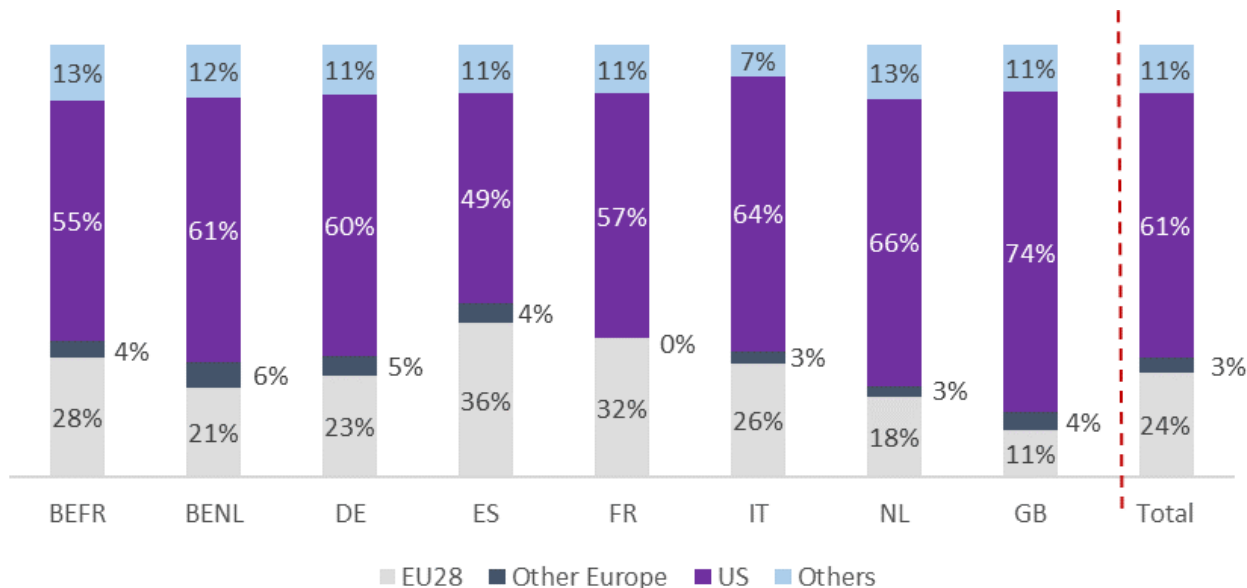
Source: European Audiovisual Observatory analysis of AQOA data

What is the origin of the content promoted?

France and Spain promote more EU28 works

- ▶ EU28 titles represent 36% of all promotion spots in Spain, and 32% in France
- ▶ The lowest EU28 share of promotion spots is found in the UK

Breakdown of promotion spots by origin and country (% , October 2019)



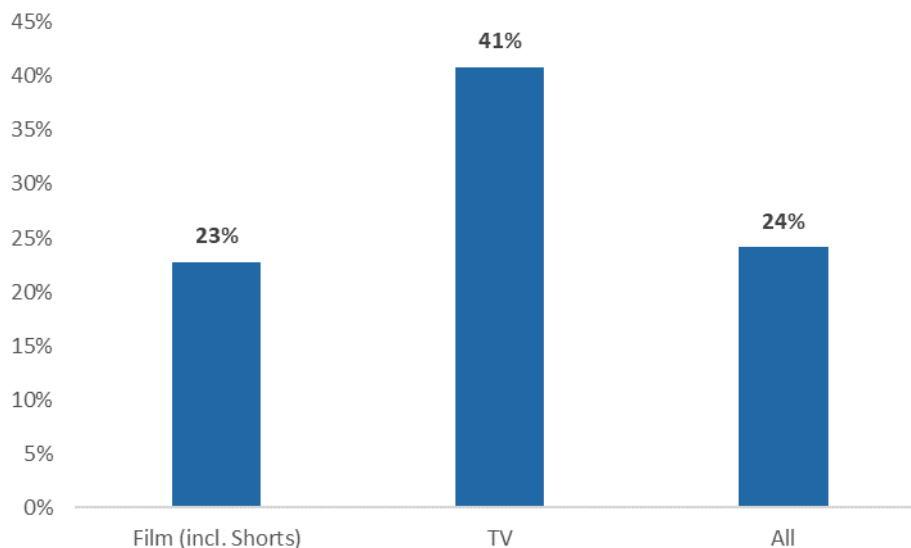
Source: European Audiovisual Observatory analysis of AQOA data

What is the origin of the content promoted?

The share of EU28 works in promotion is higher for TV content than for film

- ▶ EU28 TV titles represent 41% of TV promotion spots, i.e. more than the share of EU28 TV content in TVOD catalogues (37% measured in number of titles).
- ▶ However, it only marginally impacts the overall promotion share of EU28 titles as TV content represent a marginal share of the titles promoted.

Share of promotion spots for EU28 titles by genre (% , October 2019)



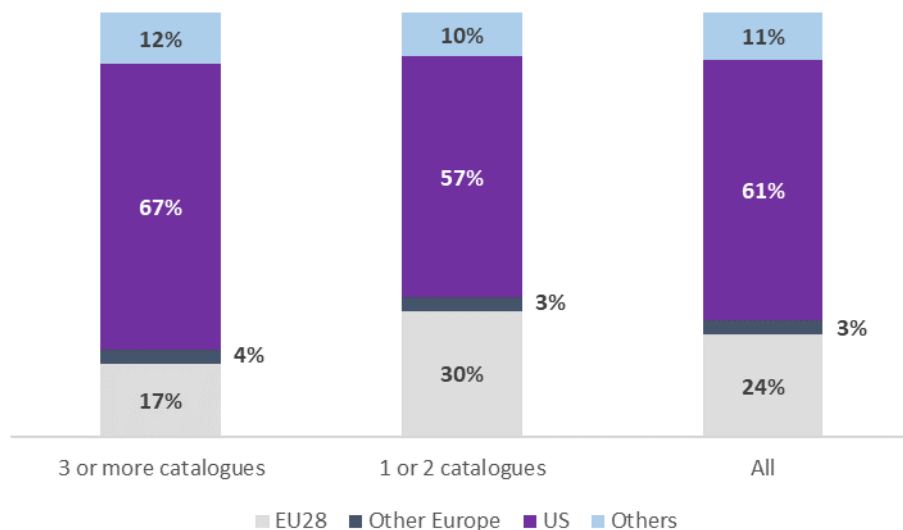
Source: European Audiovisual Observatory analysis of AQOA data

What is the origin of the content promoted?

Services with a multi-country presence grant less promotion spots to EU28 titles

- ▶ EU28 titles account for 17% of promotion spots for multi-country services vs. 30% for national services.

Origin of promotion spots by category of service (% , October 2019)



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

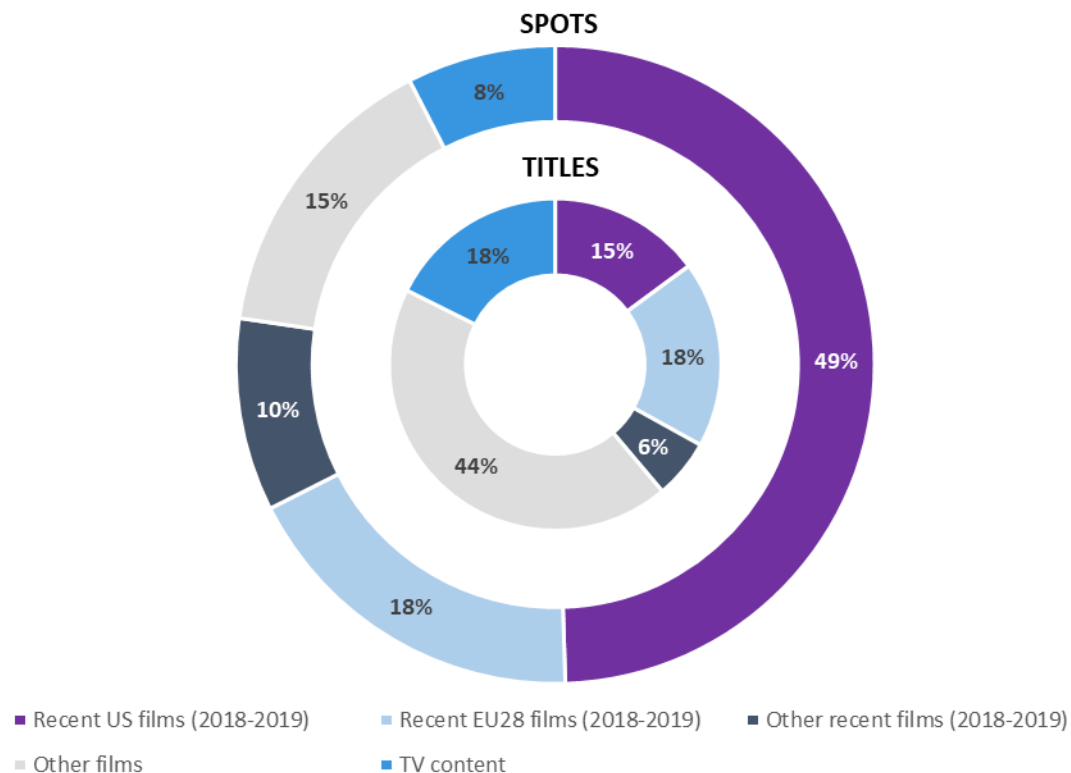
Source: European Audiovisual Observatory analysis of AQOA data

What is the origin of the content promoted?

Synthesis: close to half of promotion spots go to recent US films

- ▶ Combining the age and origin of titles shows the prominence of recent US films.
- ▶ 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 2019)



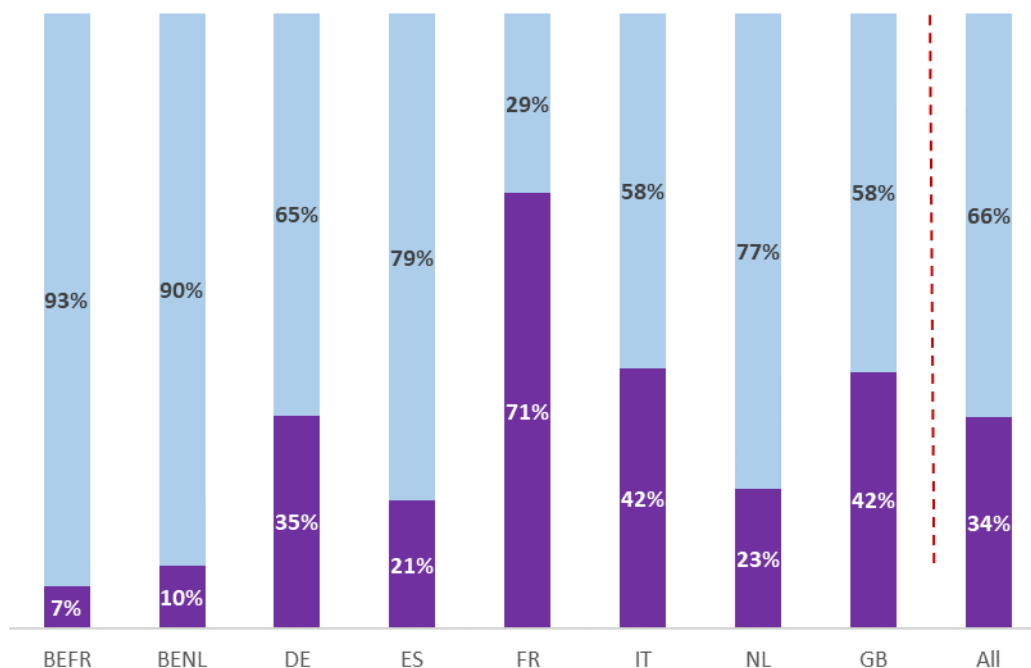
Source: European Audiovisual Observatory analysis of AQOA data

What is the origin of the content promoted?

The share of European non-national promotion reflects the composition of the catalogues

- ▶ On average, European non-national titles account for 66% of European promotion spots. This is similar to the share of European non-national titles (69%) among European titles in TVOD catalogues
- ▶ The share of national titles among promotion spots is however higher than on average in large production countries (France, Italy, United Kingdom, Germany).

Breakdown of EU28 promotion spots by national and EU28 non-national (% , October 2019)



Source: European Audiovisual Observatory analysis of AQOA data

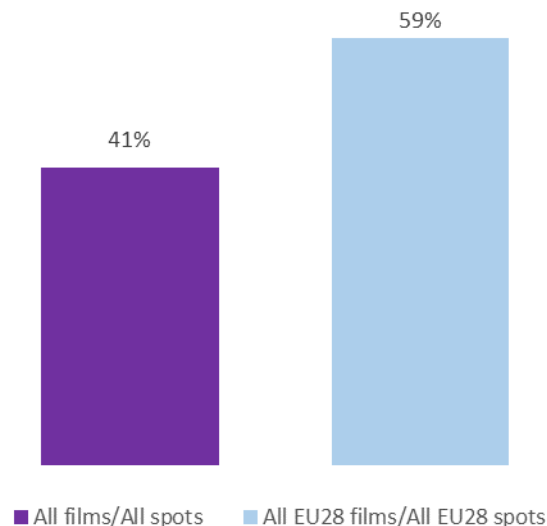
How concentrated is the promotion?

How concentrated is the promotion?

The top 10 promoted films benefit on average about 40% of promotion spots

- ▶ The concentration of promotion within EU28 films is significantly higher: the top 10 EU28 promoted films account on average for 59% of all promotion spots dedicated to EU28 films

Average share of promotion spots for the top 10 promoted titles
(%, October 2019)



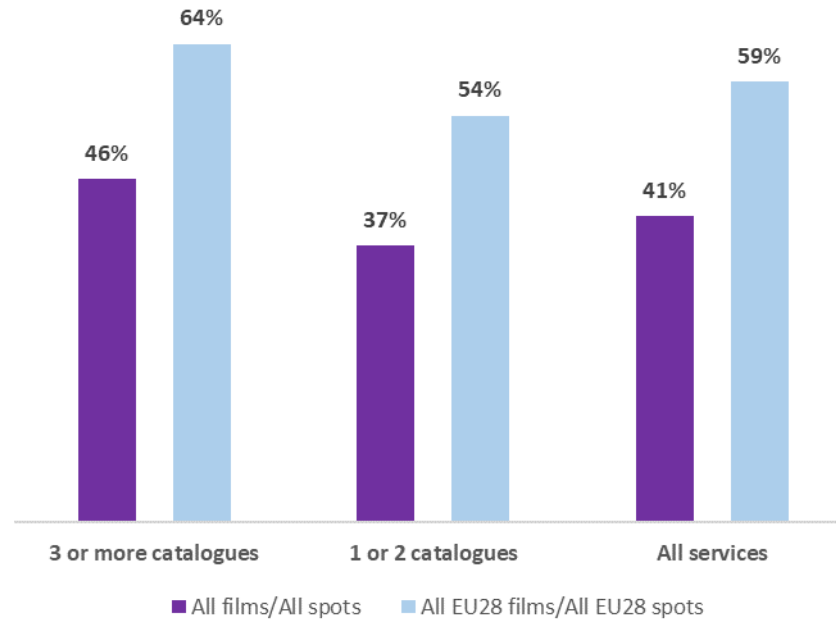
Note: These figures are averages *per service*. The share of the top 10 can be significantly lower at the country level or for all territories as more titles are promoted.

Source: European Audiovisual Observatory analysis of AQOA data

How concentrated is the promotion?

Promotion is more concentrated in multi-country services than in national services.

Average share of promotion spots for the top 10 promoted titles by category of services
(%, October 2019)



*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?

Only 1 European film in the top 10 most promoted films

Top 10 promoted titles (all territories)

Title	Year	Origin	Genre	Number of country/region where promoted	Number of promotional spots
ALADDIN	2019	US	FILM	8	2296
DARK PHOENIX	2019	US,CA	FILM	8	2275
GODZILLA: KING OF THE MONSTERS	2019	JP,CA,US	FILM	8	2240
JOHN WICK: CHAPTER 3 - PARABELLUM	2019	US	FILM	8	1772
MEN IN BLACK: INTERNATIONAL	2019	US	FILM	8	1696
AVENGERS: ENDGAME	2019	US,GB,CA	FILM	8	1560
POKÉMON DETECTIVE PIKACHU	2019	US,JP,GB,CA	FILM	8	1393
TOY STORY 4	2019	US	FILM	7	1340
FÚSI	2015	IS,DK	FILM	7	1336
MA	2019	US,JP	FILM	8	874

Top 10 promoted EU 28 titles (all territories)

Title	Year	Origin	Genre	Number of country/region where promoted	Number of promotional spots
COLD BLOOD LEGACY	2019	FR,UA,BE	FILM	6	483
THE DEAD DON'T DIE	2019	SE,US	FILM	7	417
NOUS FINIRONS ENSEMBLE	2019	FR,BE	FILM	3	378
GRETA	2018	IE,US	FILM	8	314
ROCKETMAN	2019	GB,CA,US	FILM	1	296
YESTERDAY	2019	GB,RU,CN	FILM	6	287
WONDER PARK	2019	ES,US	FILM	8	208
THE COLLINI CASE	2019	DE	FILM	1	198
VENISE N'EST PAS EN ITALIE	2019	FR,BE	FILM	4	192
THE QUEEN'S CORGI	2019	BE	FILM	5	171

Source: European Audiovisual Observatory analysis of AQOA data

Annex: list of services in the sample

Sample: 52 services from 8 countries/territories

List of services in the sample

Country	Service	Country	Service	Country	Service
BE (French speaking)	<ul style="list-style-type: none"> GOOGLE PLAY iTUNES Proximus.be VOO EVASION XBOX ONE 	ES	<ul style="list-style-type: none"> FILMIN ITUNES MOVISTAR+ RAKUTEN 	IT	<ul style="list-style-type: none"> CHILI ITUNES RAKUTEN GOOGLEPLAY
BE (Dutch speaking)	<ul style="list-style-type: none"> iTUNES Proximus.be TELENET - FILMS A LA CARTE Google Play XBOX 	FR	<ul style="list-style-type: none"> ORANGE SFR PLUZZ iTunes PS STORE XBOX LIVE CANALPLAY MYTF1 FREEBOX GOOGLE PLAY BBOX 	NL	<ul style="list-style-type: none"> iTUNES Google Play VIDEOLAND XBOX ZIGGO
DE	<ul style="list-style-type: none"> AMAZON INSTANT VIDEO GOOGLE PLAY iTUNES MAXDOME SKY VIDEOCIETY VIDELOAD UNITY MEDIA PS STORE XBOX LIVE GOOGLEPLAY 				

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