The visibility of films and TV content on VOD

2017 Edition

A publication
of the European Audiovisual Observatory

Gilles Fontaine

European Audiovisual Observatory

COUNCIL OF EUROPE
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The visibility of films and TV content on VOD – 2017 Edition
European Audiovisual Observatory (Council of Europe), Strasbourg, 2017

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Cover layout – ALTRAN, Neuilly-sur-Seine, France

Please quote this publication as
The visibility of films and TV content on VOD – 2017 Edition, European Audiovisual Observatory, Strasbourg, 2017

This report was prepared with the support of the European Commission.

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1. Main findings

- This 3rd edition of the analysis of visibility on Transactional Video-On-Demand (TVOD) services incorporates for the first time not only films but also TV content. The results of the research are in continuity with the two previous editions.
- On average, a TVOD service promotes at least once about 260 different titles during a month. The vast majority (90%) of these titles are films. 32% of the titles promoted at least once are European.
- But, when taking into account the number of promotional spots which each film was attributed, European films only benefit from 23% of the promotion efforts of the TVOD platforms. Among European films, producing countries (Belgium and Netherlands) mainly promote European non-national films. High producing countries (France, the United Kingdom and, to a lesser extent Germany) mainly promote their national films. A vast majority (90%) of promotional spots are allocated to films produced two years ago or less.
- European TV content is even less promoted than European films: they benefit from 18% of all promotional spots dedicated to TV series.
- Generally speaking, national TVOD services tend to promote a significantly higher share (30%) of European works than national versions of pan-European TVOD services (17%). However, the situation is not homogeneous within each category. Among pan-European TVOD services, iTunes (average of all national versions tracked in the sample) reaches a 30% share of promotional spots allocated to European titles, vs. 4% for Xbox Live.
- Figures are also quite heterogeneous among national TVOD services, with the share of promotional spots allocated to European titles ranging from 4% to 87%.

2. Introduction

This report is the 3rd edition of the analysis of the visibility of audiovisual content provided by Transactional On-Demand (TVOD) services. For the first time, the scope of the analysis has been extended to TV content, and in particular to TV series.

Visibility has many definitions; in this report, it is measured as a mention on the home page of the service (hereafter called a “promotional spot”).

The underlying data used in this report has been provided by AQOA. AQOA systematically monitors the promotional spots on the homepage of the services, and identifies the programme, its year of production and its country of origin. In case of coproductions, the Observatory attributes the country of origin to the main coproducers as tracked in LUMIERE Observatory database.

The data provided by AQOA:

- Covers 5 European countries: Belgium, Germany, France, the Netherlands and the United Kingdom. In the report, a distinction is systematically done between the services addressing the French-speaking (hereafter BE (CFB)) and the Flemish-speaking (hereafter BE (VLG)) communities of Belgium.
- Covers 39 transactional video-on-demand services: 19 national services, and 20 national versions of pan-European services. The complete list of services is provided in the Annexes of this report. The services tracked in a given country represent at least 70% of the market.
- Covers a full month of promotion by the on-demand services (October 2017).

A distinction is made throughout this report between:

- An approach by “Unique” films: titles”: Each film promoted (or a TV series) is accounted for one, without taking into account the number of promotional spots. This approach is used to assess the number (and origin) of films which benefit from any level of promotion.
- An approach by the number of promotional sports: The number of promotional spots for each film is here taken into account. This approach is used to assess the volume of promotion which is attributed to films (and TV content) according to their origin.

Beyond the limits of the sample itself, it should be reminded that the results of the analysis may have been biased by the release calendar of films, which may impact the promotion at a given moment, and by the very availability of European films in the VOD catalogues.

3. Which content benefits from promotion?

A total of 1070 different films and TV programmes were promoted in October 2017 by all the Transactional Video-On-Demand (TVOD) services of the sample. However, as the same content was not promoted in all countries, an average of 260 films and TV programmes was promoted in each of the 6 countries or regions of the sample.

The vast majority (90%) of titles promoted were films. This low proportion of TV series can be probably explained by the fact that TVOD services only propose a limited share of non-film content.

Table 1. Number of unique titles promoted

	BE (CFB)	BE (VLG)	DE	FR	NL	GB	Average
Films	202	187	374	175	138	330	234
TV content	7	2	43	24	5	70	25
Total	**209**	**189**	**417**	**199**	**143**	**400**	**260**

Source: European Audiovisual Observatory analysis of AQOA data

On average, 32% of the films and TV programmes promoted at least once (without taking into account the level of promotion) originated from Europe[1], vs. 60% for US films. A higher share of European films accessed to promotion in Belgium or France than in Germany, in Netherlands or in the United Kingdom.

[1] To be compared with 33% in the 2016 Edition of this study.

Table 2. Share of unique titles promoted by origin

	BEFR	BENL	DE	FR	NL	GB	Average
EU National	1%	4%	11%	28%	6%	17%	12%
EU Non-National	33%	28%	16%	13%	22%	8%	18%
Other Europe	2%	4%	1%	3%	2%	1%	2%
SUB-TOTAL EUROPE	***36%***	***35%***	***28%***	***44%***	***29%***	***26%***	***32%***
US	56%	57%	63%	52%	62%	65%	60%
Other World	8%	8%	8%	5%	8%	9%	8%
TOTAL	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Source: European Audiovisual Observatory analysis of AQOA data

European TV series access less easily to promotion than European films. Only **26% of TV content which accessed to promotion was produced in Europe.**

Table 3. Compared share of unique films and TV content titles promoted by origin

	Films	TV content	All
EU NATIONAL	12%	14%	12%
EU NON NATIONAL	18%	11%	18%
EUR	2%	1%	2%
SUB-TOTAL EUROPE	***32%***	***26%***	***32%***
US	59%	70%	60%
WORLD	8%	5%	8%
TOTAL	**100%**	**100%**	**100%**

Source: European Audiovisual Observatory analysis of AQOA data

The films promoted in TVOD tend to be recent– rather logically as they benefit from an exclusivity window before films are made available on TV. Out of the 1070 different films promoted at least once on at least one service of the sample, 68% were produced in 2016 or in 2017.

Table 4. Breakdown of unique films promoted by year of production

	BE (CFB)	BE (VLG)	DE	FR	NL	GB	All
2016 or 2017	77%	82%	60%	86%	96%	76%	68%
2015 or before	23%	18%	40%	14%	4%	24%	32%

Source: European Audiovisual Observatory analysis of AQOA data

The same films are not necessarily promoted by all TVOD services at the same time. The main explanation can be that they are not already or no longer available on certain platforms. However, **certain films, mostly produced in the United States, seem to benefit**

both from a simultaneous wide release and a wide promotion. The following table presents the top 30 films by number of TVOD services which promoted them in October 2017. 27 of them were produced in the US.

Table 5. Top 30 unique films by number of platforms were promoted

Title	Number of platforms where promoted	Year	Origin
KING ARTHUR LEGEND OF THE SWORD	38	2017	US
PIRATES OF THE CARIBBEAN: SALAZAR'S REVENGE	38	2017	US
WONDER WOMAN	37	2017	US
ALIEN : COVENANT	36	2017	US
GUARDIANS OF THE GALAXY VOL 2	36	2017	US
THE MUMMY (2017)	32	2017	US
FAST & FURIOUS 8	30	2017	US
THE BOSS BABY	28	2017	US
TRANSFORMERS: THE LAST KNIGHT	25	2017	US
SNATCHED	24	2017	US
BAYWATCH	23	2017	US
BEAUTY AND THE BEAST	23	2017	US
GET OUT	23	2017	US
CONSPIRACY	22	2017	GB
DIARY OF A WIMPY KID : THE LONG HAUL	20	2017	US
KINGSMAN THE SECRET SERVICE	18	2014	US
A DOG'S PURPOSE	16	2017	US
BLADE RUNNER 2049	16	2017	US
EVRYTHING, EVERYTHING	16	2017	US
GOING IN STYLE	16	2017	US
BLADE RUNNER THE FINAL CUT	15	1982	US
THE ZOOKEEPER'S WIFE	15	2017	GB
SLEEPLESS	14	2017	US
SNIPER ULTIMATE KILL	14	2017	US
THE WALL	14	2017	US
COLOSSAL	13	2016	CA
CULT OF CHUCKY	13	2017	US
GHOST IN A SHELL	13	2017	US
ASSASSIN'S CREED	12	2016	US
CHIPS	12	2017	US

Source: European Audiovisual Observatory analysis of AQOA data

4. Which content gets promoted most?

Unlike in the previous section where the focus was on identifying films and TV series which accessed to promotion (no matter the intensity of promotion), this section takes into account the volume of promotion (i.e. the number of promotional spots) attributed to each film or TV series.

During October 2017, the 39 TVOD services of the sample dedicated **a total of 51 363 spots on their home page to the promotion of films or TV series**, i.e. an average of 1317 spots per platform. But the intensity of promotion strongly varies between platforms with figures ranging from 426 (the Playstation Store in Germany) to 5 458 for the Xbox TVOD service in French Speaking Belgium. These differences can be affected by factors such as the marketing policy or the design of the interface.

Films benefited of most of the promotional spots (97%). Only a few TV series indeed received significant promotion space; this can be explained by the limited share of TV content in the catalogues and the limited commercial potential of TV series in TVOD due to the strong exposure of TV series on free and pay television and on Subscription Video-On-Demand.

Table 6. Breakdown of promotional spots by category of content

	BE (CFB)	BE (VLG)	DE	FR	NL	GB	All
Films	**6269**	**7540**	**11204**	**8942**	**5899**	**9887**	**49741**
TV content	**87**	**4**	**454**	**448**	**152**	**477**	**1622**
Total	6356	7544	11658	9390	6051	10364	51363

Source: European Audiovisual Observatory analysis of AQOA data

23% of the promotional spots were attributed to films and TV programmes produced in Europe[2] vs. 71% for US content. European films benefited from a higher share of promotion efforts in France and Belgium than in Germany, the Netherlands or the United Kingdom.

The respective shares of national and non-national European films vary significantly between the countries. Low producing countries (Belgium and Netherlands) mainly promote European non-national films. High producing countries (France, the United Kingdom and, to a lesser extent Germany) mainly promote their national films.

[2] To be compared with 22% in the 2016 Edition of this study.

Table 7. Breakdown of promotional spots by origin

	BE (CFB)	BE (VLG)	DE	FR	NL	GB	All
EU NATIONAL	1%	3%	12%	24%	3%	10%	10%
EU NON NATIONAL	26%	21%	9%	9%	12%	3%	12%
OTHER EUROPE	1%	1%	1%	1%	1%	0%	1%
SUB-TOTAL EUROPE	***29%***	***25%***	***22%***	***34%***	***15%***	***13%***	***23%***
US	63%	66%	72%	62%	78%	81%	71%
OTHER WORLD	9%	9%	6%	4%	6%	6%	6%
TOTAL	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Source: European Audiovisual Observatory analysis of AQOA data

European TV series are even less promoted than European films: they benefit from 18% of all promotional spots dedicated to TV series. This is probably due to a lower volume of TV series available in TVOD catalogues and to a lower level of brand-recognition.

Table 8. Breakdown of promotional spots by country of origin and category of content

	Films	TV content	All
EU NATIONAL	10%	10%	10%
EU NON NATIONAL	12%	8%	12%
OTHER EUROPE	1%	0%	1%
SUB-TOTAL EUROPE	***23%***	***18%***	***23%***
US	71%	77%	71%
OTHER WORLD	6%	5%	6%
TOTAL	**100%**	**100%**	**100%**

Source: European Audiovisual Observatory analysis of AQOA data

Recent films logically get more promotion than older films: **films produced either in 2016 or in 2017 were allocated 90% of all promotional spots[3].**

[3] To be compared with 93% in the 2016 Edition of this study.

Table 9. Breakdown of promotional spots by year of production

	BE (CFB)	BE (VLG)	DE	FR	NL	GB	All
2016 or 2017	77%	82%	60%	86%	96%	76%	68%
2015 or before	23%	18%	40%	14%	4%	24%	32%

Source: European Audiovisual Observatory analysis of AQOA data

Promotion tends to be concentrated on a relatively limited number of films. On average, **the 10 most promoted films benefit from 32% of all promotional spots.**

Table 10. Share of promotional spots of the 10 most promoted films

	BEFR	BENL	DE	FR	NL	UK	Average
Number of different film promoted	209	189	417	199	143	400	231
Share of the 10 most promoted films	30%	27%	33%	36%	36%	41%	32%

Source: European Audiovisual Observatory analysis of AQOA data

25 of the 30 most promoted films by the TVOD services of the sample were produced in the US. 29 were produced either in 2016 or in 2017.

Table 11. Top 30 most promoted films

Rank	Title	Year	Origin
1	PIRATES OF THE CARIBBEAN: SALAZAR'S REVENGE	2017	US
2	WONDER WOMAN	2017	US
3	ALIEN : COVENANT	2017	US
4	KING ARTHUR LEGEND OF THE SWORD	2017	US
5	GUARDIANS OF THE GALAXY VOL 2	2017	US
6	THE MUMMY (2017)	2017	US
7	FAST & FURIOUS 8	2017	US
8	BAYWATCH	2017	US
9	THE BOSS BABY	2017	US
10	TRANSFORMERS: THE LAST KNIGHT	2017	US
11	BEAUTY AND THE BEAST	2017	US
12	SNATCHED	2017	US
13	BLADE RUNNER 2049	2017	US
14	GET OUT	2017	US
15	CONSPIRACY	2017	GB
16	DIARY OF A WIMPY KID : THE LONG HAUL	2017	US
17	COLOSSAL	2016	CA

Rank	Title	Year	Origin
18	ASSASSIN'S CREED	2016	US
19	LOGAN	2017	CA
20	SLEEPLESS	2017	US
21	THE WALL	2017	US
22	GHOST IN A SHELL	2017	US
23	A DOG'S PURPOSE	2017	US
24	LIFE (2017)	2017	US
25	KINGSMAN THE SECRET SERVICE	2014	US
26	MARIE - FRANCINE	2017	FR
27	DESPICABLE ME 3	2017	US
28	THE ZOOKEEPER'S WIFE	2017	GB
29	THE CIRCLE	2017	US
30	KONG: SKULL ISLAND	2017	US

Source: European Audiovisual Observatory analysis of AQOA data

France produced 11 and the United Kingdom 10 out of the 30 most promoted European films.

Table 12. Top 30 most promoted European films

Rank	Title	Year	Origin
1	CONSPIRACY	2017	GB
2	MARIE - FRANCINE	2017	FR
3	THE ZOOKEEPER'S WIFE	2017	GB
4	47 METERS DOWN	2017	GB
5	ALIBI.COM	2017	FR
6	FREE FIRE	2016	GB
7	PROBLEMOS	2017	FR
8	LOMMBOCK	2017	DE
9	CE QUI NOUS LIE	2017	FR
10	A MONSTER CALLS	2016	DE
11	THE PROMISE	2017	ES
12	L'AMANT DOUBLE	2017	FR
13	CONNI UND CO 2 - RETTET DIE KANINCHENINSEL	2017	DE
14	TABLE 19	2017	GB
15	CHURCHILL	2017	GB
16	DJANGO	2017	FR
17	RODIN	2017	FR
18	A BRAS OUVERTS	2017	FR
19	PEPPA PIG: MY FIRST CINEMA	2016	GB
20	HHhH	2017	FR

Rank	Title	Year	Origin
21	TARDE PARA LA IRA	2016	ES
22	LES FANTOMES D'ISMAEL	2017	FR
23	BROERS	2017	NL
24	HAPPY BURNOUT	2017	DE
25	MON ANGE	2016	BE
26	UN PROFIL POUR DEUX	2017	AT
27	DEMAIN TOUT COMMENCE	2016	FR
28	DON'T HANG UP	2016	GB
29	MY COUSIN RACHEL	2017	GB
30	HAMPSTEAD	2017	GB

Source: European Audiovisual Observatory analysis of AQOA data

The mots promoted films in each country of the sample significantly differ. Only a few European films were promoted in more than on country.

Table 13. Top 5 most promoted films by country

#	BE (CFB)		BE (VLG)		DE		FR		NL		GB	
1	**TABLE 19**	GB	**THE ZOOKEEPER'S WIFE**	GB	LOMMBOCK	DE	**MARIE - FRANCINE**	FR	**CONSPIRACY**	GB	CHURCHILL	GB
2	PROBLEMOS	ES	**FREE FIRE**	GB	CONNI UND CO 2 - RETTET DIE KANINCHENINSEL	DE	ALIBI.COM	FR	**FREE FIRE**	GB	PEPPA PIG: MY FIRST CINEMA	GB
3	**CONSPIRACY**	GB	DON'T HANG UP	GB	A MONSTER CALLS	DE	47 METERS DOWN	GB	THE PROMISE	ES	MY COUSIN RACHEL	GB
4	A BRAS OUVERTS	FR	DJANGO	FR	HAPPY BURNOUT	DE	CE QUI NOUS LIE	FR	**THE ZOOKEEPER'S WIFE**	GB	HAMPSTEAD	GB
5	**MARIE FRANCINE**	FR	**TABLE 19**	GB	**CONSPIRACY**	GB	L'AMANT DOUBLE	FR	THOMAS & FRIENDS: JOURNEY BEYOND SODO	GB	CARDBOARD GANGSTERS	IE

Source: European Audiovisual Observatory analysis of AQOA data

The top 20 of the most promoted TV content is dominated by TV series produced in the US. Only 4 TV series produced in Europe appear in the ranking.

Table 14. Top 20 most promoted TV content

Rank	Top 20 most promoted TV content	COO
1	GAME OF THRONES	US
2	THE WALKING DEAD	US
3	HOUSE OF CARDS	US
4	FEAR THE WALKING DEAD	US
5	BROADCHURCH	GB
6	THE BIG BANG THEORY	US
7	BILLIONS	US
8	THE DEUCE	US
9	PEPPA PIG	GB
10	THE FLASH	US
11	LUCIFER	US
12	MR. ROBOT	US
13	THE HANDMAID'S TALE	US
14	YOUNG SHELDON	US
15	THE CUCKOO'S CALLING	GB
16	SUPERNATURAL	US
17	SNATCH	US
18	SCANDAL	US
19	LEGENDS OF TOMORROW	US
20	LA MANTE	FR

Source: European Audiovisual Observatory analysis of AQOA data

5. Which services promote what?

In this section, we focus on the promotion efforts of the different services. We split the platforms of the sample in two categories:

- The national TVOD services.
- The national versions of pan-European TVOD services.

Generally speaking, national TVOD services tend to promote a significantly higher share (30%) of European works than national versions of pan-European TVOD services (17%).

Table 15. Compared share of promotional spots by category of TVOD services

	National services	Pan-European services	All
NATIONAL	13%	8%	10%
EU NON NATIONAL	16%	9%	12%
OTHER EUROPE	1%	1%	1%
SUB-TOTAL EUROPE	***30%***	***17%***	***23%***
US	64%	76%	71%
OTHER WORLD	6%	7%	6%
TOTAL	**100%**	**100%**	**100%**

Source: European Audiovisual Observatory analysis of AQOA data

However, the situation is not homogeneous within each category. **Among pan-European TVOD services, iTunes (average of all national versions tracked in the sample) reaches a 30% share of promotional spots allocated to European titles,** vs. 4% for Xbox Live.

Table 16. Compared share of promotional spots by pan-European services

	iTunes	Xbox	Amazon	PS	Google Play	All pan-European
NATIONAL	11%	2%	15%	12%	5%	8%
EU NON NATIONAL	18%	2%	8%	2%	9%	9%
OTHER EUROPE	1%	0%	1%	3%	0%	1%
SUB-TOTAL EUROPE	***30%***	***4%***	***24%***	***16%***	***14%***	***17%***
US	62%	89%	70%	79%	80%	76%
OTHER WORLD	7%	7%	6%	4%	6%	7%
TOTAL	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Source: European Audiovisual Observatory analysis of AQOA data

Figures are also quite heterogeneous among national TVOD services, with the share of promotional spots allocated to European titles ranging from 4% to 87%.

The situation is also heterogeneous within each country, with strong variations between the national TVOD services.

Table 17. Compared share of promotional spots by national services - Belgium

	BE (CFB)		BE (VLG)	
	PROXIMUS	**VOO EVASION**	**PROXIMUS**	**TELENET**
NATIONAL	1%	1%	3%	7%
EU NON NATIONAL	39%	29%	29%	34%
OTHER EUROPE	3%	0%	3%	0%
SUB-TOTAL EUROPE	***43%***	***30%***	***35%***	***41%***
US	47%	63%	54%	47%
OTHER WORLD	10%	8%	11%	12%
TOTAL	**100%**	**100%**	**100%**	**100%**

Source: European Audiovisual Observatory analysis of AQOA data

Table 18. Compared share of promotional spots by national services - Germany

	DE				
	MAXDOME	UNITY MEDIA	VIDEOCIETY	VIDEOLOAD	SKY
NATIONAL	9%	11%	18%	17%	16%
EU NON NATIONAL	10%	9%	12%	8%	9%
OTHER EUROPE	0%	0%	1%	1%	0%
SUB-TOTAL EUROPE	*19%*	*20%*	*31%*	*25%*	*25%*
US	77%	67%	64%	67%	72%
OTHER WORLD	3%	14%	5%	8%	3%
TOTAL	100%	100%	100%	100%	100%

Source: European Audiovisual Observatory analysis of AQOA data

Table 19. Compared share of promotional spots by national services - France

	FR				
	CANALPLAY	Orange	MYTF1VOD	PLUZZ	SFR
NATIONAL	21%	31%	17%	67%	30%
EU NON NATIONAL	7%	14%	12%	16%	7%
OTHER EUROPE	1%	1%	0%	0%	0%
SUB-TOTAL EUROPE	*30%*	*46%*	*30%*	*84%*	*37%*
US	66%	52%	70%	16%	63%
OTHER WORLD	4%	2%	0%	0%	0%
TOTAL	100%	100%	100%	100%	100%

Source: European Audiovisual Observatory analysis of AQOA data

Table 20. Compared share of promotional spots by national services – Netherlands and United Kingdom

	NL		GB		
	VIDEOLAND	ZIGGO	SKY	BT BOX OFFICE	VIRGIN MEDIA
NATIONAL	4%	3%	13%	7%	10%
EU NON NATIONAL	27%	11%	1%	1%	3%
OTHER EUROPE	3%	0%	0%	0%	0%
SUB-TOTAL EUROPE	*34%*	*14%*	*14%*	*8%*	*13%*
US	61%	80%	84%	90%	77%
OTHER WORLD	5%	6%	2%	2%	9%
TOTAL	100%	100%	100%	100%	100%

Source: European Audiovisual Observatory analysis of AQOA data

6. Annex: list of TVOD services of the sample

Table 21. List of TVOD services of the sample

Country	Service
BE (CFB)	GOOGLE PLAY
BE (CFB)	ITUNES
BE (CFB)	PROXIMUS
BE (CFB)	VOO EVASION
BE (CFB)	XBOX LIVE
BE (VLG)	GOOGLE PLAY
BE (VLG)	iTUNES
BE (VLG)	PROXIMUS
BE (VLG)	TELENET
BE (VLG)	XBOX
DE	AMAZON
DE	GOOGLE PLAY
DE	iTUNES
DE	MAXDOME
DE	PS STORE
DE	SKY
DE	UNITY MEDIA
DE	VIDEOCIETY
DE	VIDEOLOAD
FR	CANALPLAY
FR	GOOGLE PLAY
FR	ITUNES
FR	MYTF1VOD
FR	Orange
FR	PLUZZ
FR	SFR
FR	SONY PS
GB	AMAZON
GB	BT BOX OFFICE
GB	GOOGLE PLAY
GB	iTUNES

Country	Service
GB	PS STORE
GB	SKY
GB	VIRGIN MEDIA
NL	GOOGLE PLAY
NL	iTUNES
NL	VIDEOLAND
NL	XBOX
NL	ZIGGO

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