

Broadcasters' online video services

An overview

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Questions

- **How are simulcast and catch-up offers integrated in the broadcaster's online offer?**
- **What exactly is catch-up?**
- **What is available in simulcast and catch-up in the national market?**
- **What is available abroad?**

Methodology

- **21 TV channels**
- **6 countries**
- **Public Broadcaster**
- **Leading private broadcasters**

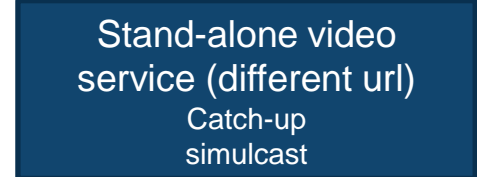
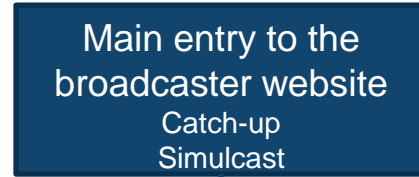
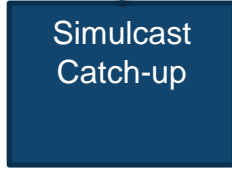
- **Check of availability of simulcast**
- **Analysis of one week of programmes**
- **Classification by genre**
- **Check of availability in catch-up**
- **Limited check of availability of simulcast in France**
- **Check of availability of catch-up in France**

Das Erste	DE
ProSieben	DE
RTL	DE
ZDF	DE
TVE1	ES
Antena 3	ES
Telecinco	ES
France 2	FR
M6	FR
TF1	FR
BBC One	GB
Channel 5	GB
ITV1	GB
Italia 1	IT
La 7	IT
Rai 1	IT
RTP1	PT
SIC	PT
TVI	PT
Antena 1	RO
TVR1	RO

How are simulcast and catch-up offers integrated in the broadcaster's online offer?

Simulcast and catch-up within the broadcaster's online service

- A one-stop-shop for TV groups' simulcast and catch-up offers:
 - Simulcast and catch-up are proposed through the same service.
 - The service regroups the simulcast and the catch-up of all TV channels belonging to the group.
- Broadcasters use a specific sub-brand for their video offers.
- Simulcast and catch-up can be either a feature on the broadcaster website, the main entry point for the online offer or a stand-alone service.



What exactly is catch-up?

For how long are programmes made available in catch-up?

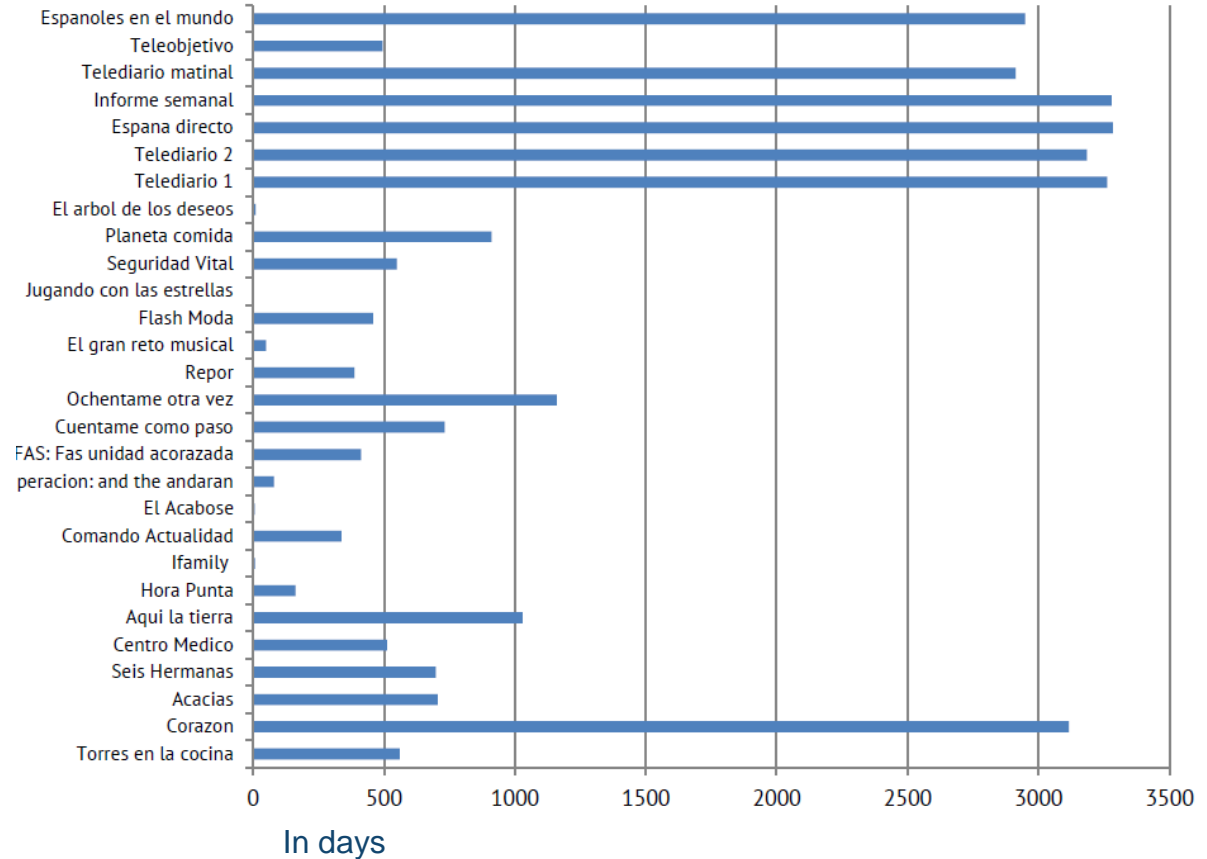
Two different schemes:

1. A relatively homogeneous pattern: e.g. 7 to 30 days. The vast majority of the programmes are systematically withdrawn after this period of time.
2. Most of the programmes are kept online, at least for a very significant period of time after the broadcast.

Oldest episode available online of shows currently on air

Example of
scheme 2

TVE a la carta



Thee different models of simulcast/catch-up offers

1: The dedicated simulcast/catch-up service

The vast majority of programmes are catch-up, available for a limited period of time, with occasional inclusion of web exclusives and Premieres.

- Two main patterns: 7 days and 30 days

2: The free on-demand video library

The simulcast/catch-up offer is included in a broader video library. When rights are available, all programmes broadcast are generally made available on the service for an unlimited period of time. Recently broadcast shows account for only a minority of programmes available.

- Archives represent 71% and 84% of unique titles available in the “RTP play” and “TVE a la carta” services respectively.

3: The SVOD service

The simulcast/catch-up offer is the entry point to a broader library accessible through a subscription

- Simulcast and catch-up can be free, the rest of the offer is for pay
- Simulcast and catch-up are also for pay

**What is available in simulcast and “catch-up”
in the national market ?**

Simulcast on the national market

Most TV channels of the sample propose simulcast in their national markets

TVE1	✓
Antena 1	✓
Antena 3	✓
BBC One	✓
Channel 5	✗
Das Erste	✓
France 2	✓
Italia 1	✓
ITV1	✓
La 7	✓
M6	✓
ProSieben	✓
Rai 1	✓
RTL	✓
RTP1	✓
SIC	✓
Telecinco	✓
TF1	✓
TVI	✓
TVR1	✓
ZDF	✓



Catch-up: which programmes are made available?

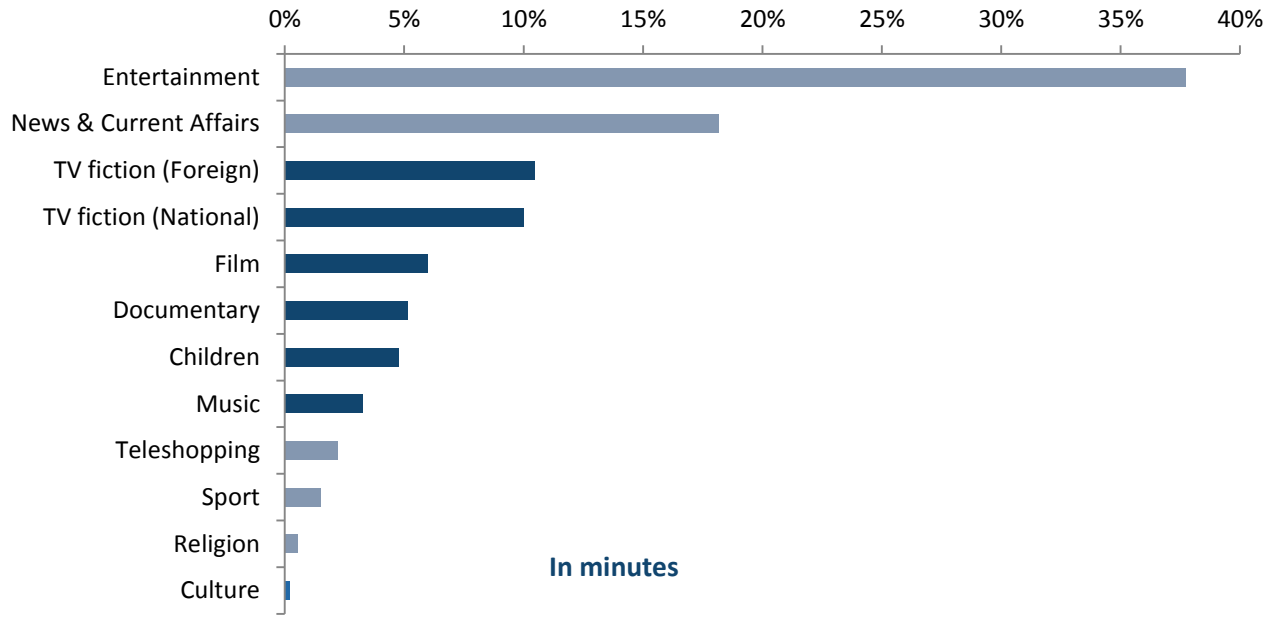
Methodological issues



- Individual programmes are not always identified within a block of programming (e.g. children programmes).
- Episodes of a given show may not be specified.
- The night schedule may be unclear, and include repeats of the programming of the same day. It may also include repeats of older episodes.
- Some programmes are not available in full length in catch-up.
- The announced broadcasting schedule may not be the correct one.
- Short programmes (less than 5 minutes) may not necessarily be identified in the schedule;
- Advertising and self-promotion may not be taken into account.

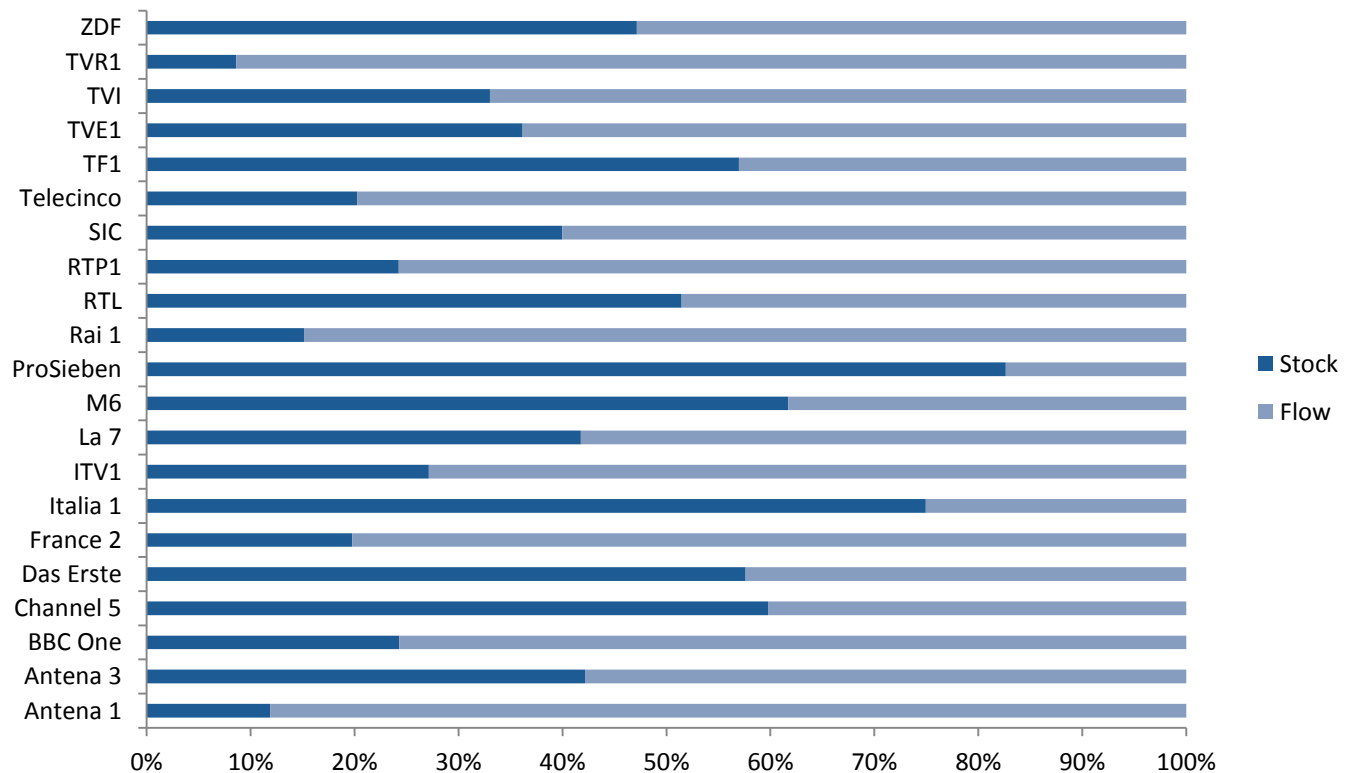
Background: programming of TV channels of the sample

“Stock” programme:
40%
“Flow” programmes:
60%



On week programming

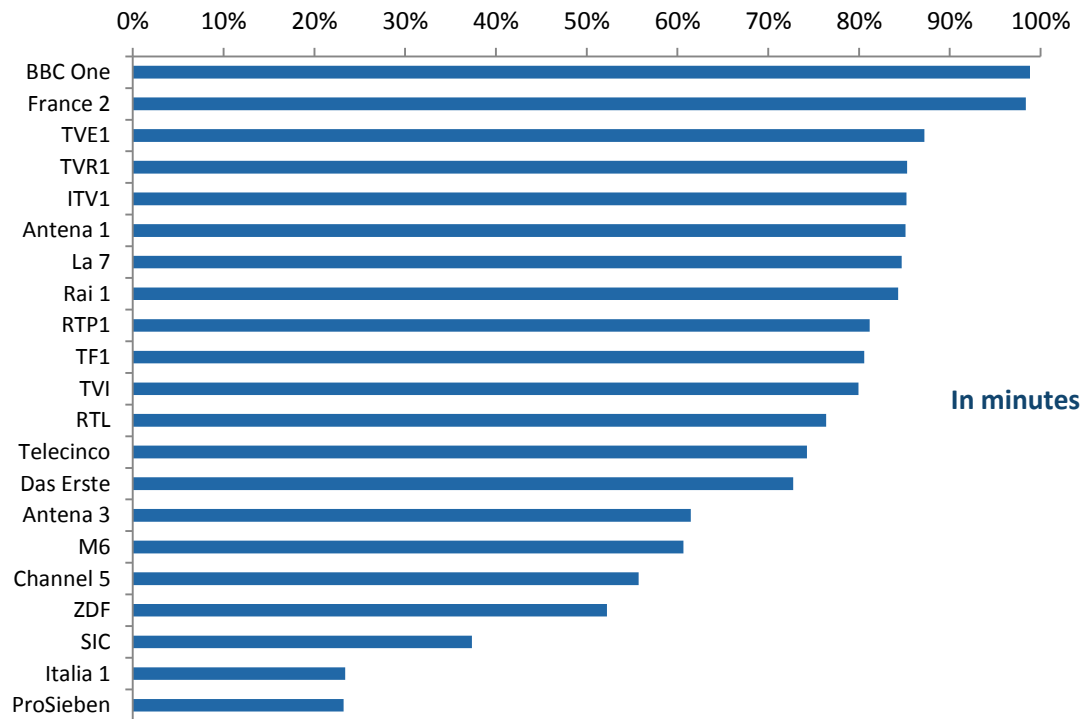
... but strong differences in the structure of programming



The share of programmes available nationally on catch-up varies between $\approx 20\%$ and $\approx 100\%$

Key factors:

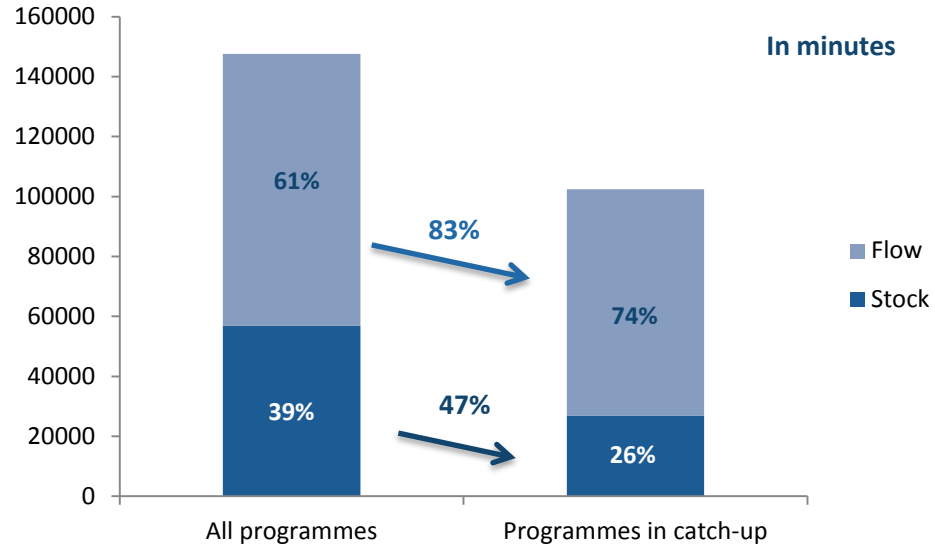
- *Programming ?*
- *Rights*
- *Negotiations with right-holders ?*
- *Cost ?*



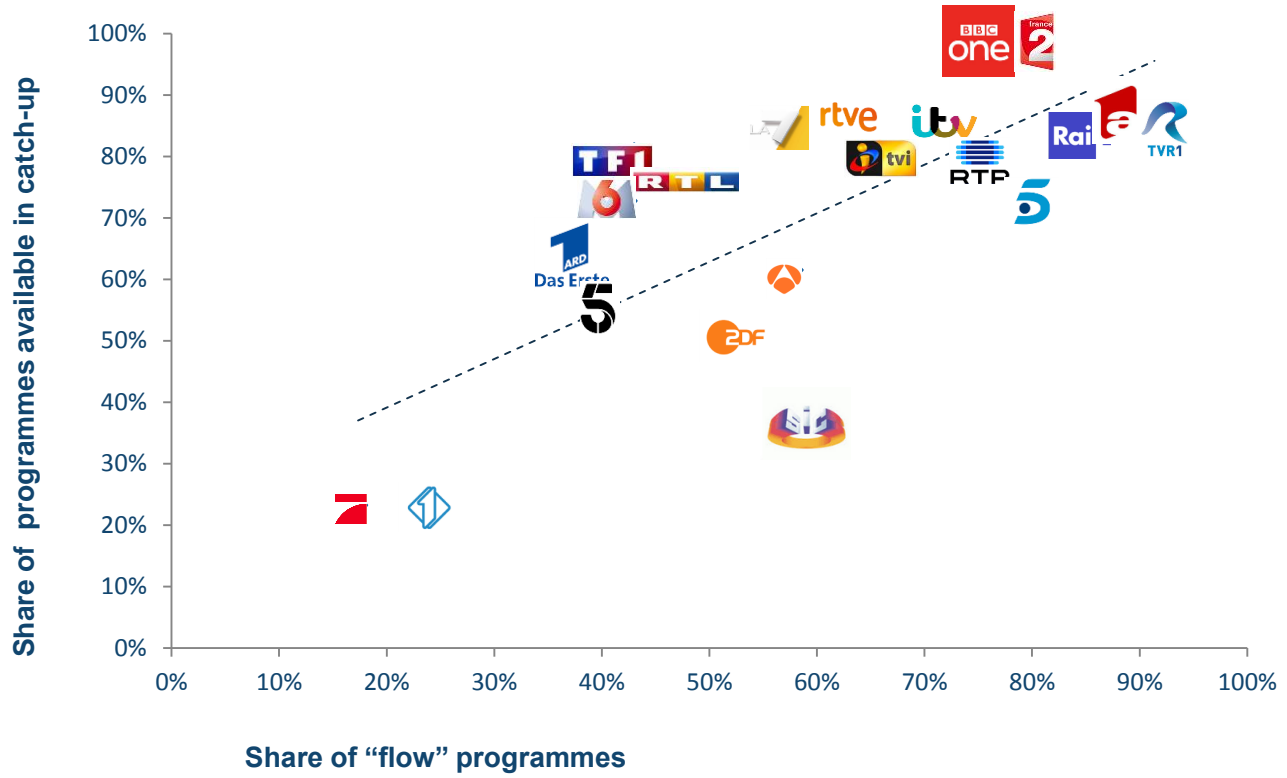
On week programming

**“Flow”
programmes are
significantly
more available
in catch-up**

Methodological issues



And therefore,
the more “flow”
programmes in
the schedule,
the more
programmes
available in
catch-up



Initial considerations on cross-border availability

Initial analysis suggests limited access to simulcast

Three broadcasters from the sample offer an international pay version of their simulcast and catch-up TV offer

Channel	15/05/2017 - 5pm	14/06/2017 - 12 am	14/06/2017 - 3 pm	15/06/2017 - 5 pm
Das Erste	Yes	Yes	No	No
ProSieben	No	No	No	No
RTL	No	No	No	No
ZDF	No	No	No	No
TVE1	Yes	Yes	Yes	Yes
Antena 3	No	No	No	No
Telecinco	No	Yes	Yes	Yes
BBC One	No	No	No	No
ITV1	No	No	No	No
Italia 1	No	No	No	No
La 7	Yes	Yes	Yes	Yes
Rai 1	No	No	No	No
RTP1	Yes	Yes	Yes	No
SIC	No	No	No	No
TVI	Yes	Yes	Yes	Yes
Antena 1	No	No	No	No

Partially available

Never available

Always available



Two different patterns for cross-boarder access to catch-up

Case 1: 82% of programmes available on catch-up made available abroad

All sample: 51% of programmes available on catch-up made available abroad

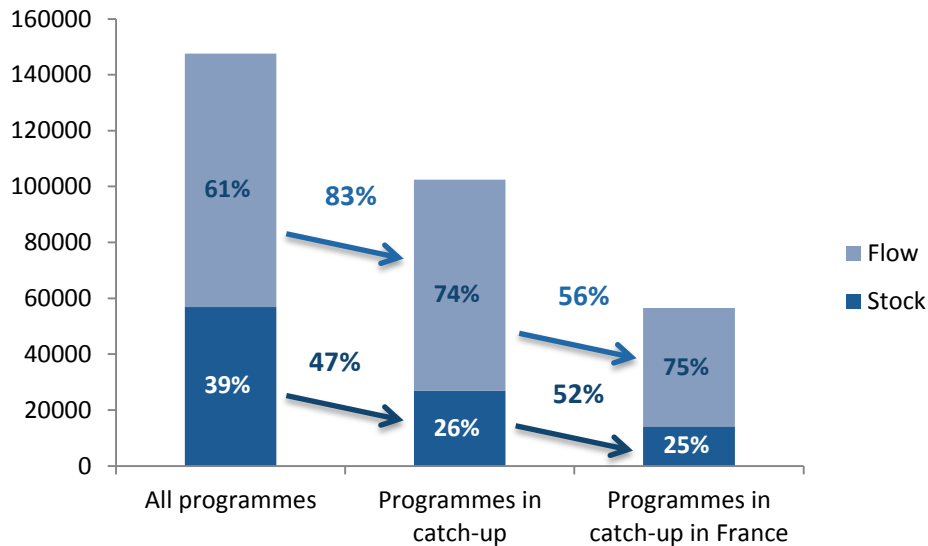
Case 1:
Programme per programme geo-blocking

Case 2:
No programme available



About the same proportion of flow and stock catch-up programmes seems to be made available abroad

Discrepancies between simulcast and catch-up ?



At first sight, greater availability abroad for catch-up than for simulcast. Is it really the case? Are rights negotiated differently ? Is it easier to get the non-domestic rights for catch-up than for simulcast?



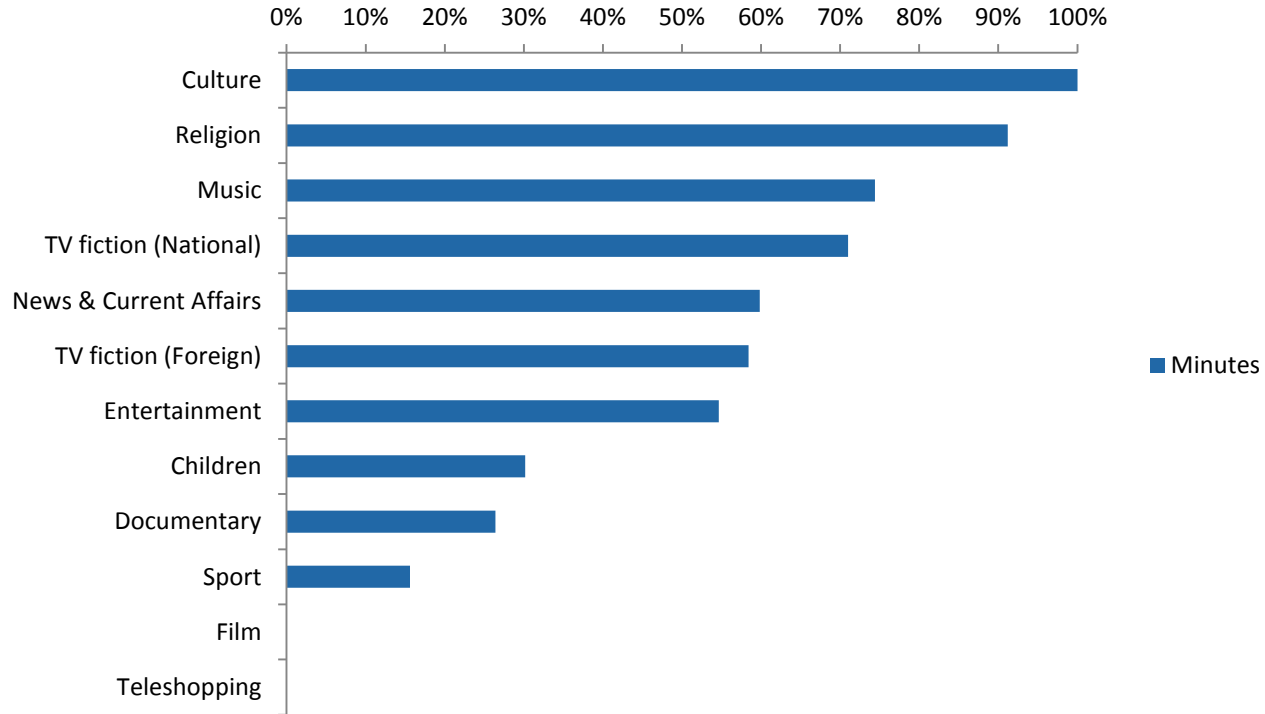
Only based on the access in France to non-French channels

Main take-aways

- Simulcast and catch-up can be either a feature on the broadcaster website, the main entry point for the online offer or a stand alone service.
- Simulcast and catch-up offers rather than catch-up TV services: simulcast and catch-up often embedded in a broader video offer
- Programme genre is a key factor of the availability in catch-up
- Programmes are available from a standardised period of time to a virtually unlimited period of time
- Two cases for the cross-border availability of catch-up: no availability (except with pay options); or a significant part of the programmes available nationally are available abroad.

Back-up slide

Analysis by genre



“Stock” programme: 53% - Excluding zeros: 78%

“Flow” programmes: 56% - Excluding zeros: 83%

 Only based on the access in France to non-French channels