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Note 3

# The presence of broadcasters on video sharing platforms

## *Typology and qualitative analysis*

Christian Grece

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**Director of publication** – Susanne Nikoltchev  
**Executive Director, European Audiovisual Observatory**

**Editorial supervision** – Gilles Fontaine  
**Head of DMI, European Audiovisual Observatory**

**Author** – Christian Grece, [Christian.Grece@coe.int](mailto:Christian.Grece@coe.int)  
**Analyst, European Audiovisual Observatory**

**Marketing** - Markus Booms, [markus.booms@coe.int](mailto:markus.booms@coe.int), European Audiovisual Observatory  
**Press and Public Relations** - Alison Hindhaugh, [alison.hindhaugh@coe.int](mailto:alison.hindhaugh@coe.int), European Audiovisual Observatory

**Publisher**  
**European Audiovisual Observatory**  
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**Europäische Audiovisuelle Informationsstelle**  
**76, allée de la Robertsau F-67000 STRASBOURG**  
**<http://www.obs.coe.int>**  
**Tél. : +33 (0)3 90 21 60 00**  
**Fax: +33 (0)3 90 21 60 19**

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## Table of contents

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<b>1.</b>	<b>Methodology and Limits of note</b> .....	<b>5</b>
1.1	Methodology – qualitative survey of channel pages and videos posted.....	5
1.2	Limits of Note.....	10
<b>2.</b>	<b>Main Findings</b> .....	<b>11</b>
2.1	Executive summary - General overview .....	11
2.2	Public broadcasters in EU-5 .....	14
2.3	Commercial broadcasters – EU-5.....	17
2.4	Pay TV – EU-5 .....	20
2.5	Thematic channels – EU-5.....	23
2.6	Summary of Main Multi-Channel Network (MCN) acquisitions .....	25
<b>3.</b>	<b>ANNEXES AND DATA</b> .....	<b>29</b>
<b>4.</b>	<b>France</b> .....	<b>30</b>
4.1	French broadcasters on YouTube – Summary tables .....	30
4.1.1	Ranking of broadcasters official YouTube channels and broadcasters web sites ....	32
4.2	France Télévisions – public broadcaster .....	35
4.2.1	France Télévisions channel presence on YouTube .....	35
4.2.2	France Télévisions channel presence on Dailymotion .....	37
4.3	TF1 – commercial free-to-air broadcaster .....	39
4.3.1	TF1’s channel presence on YouTube.....	39
4.3.2	TF1’s channel presence on Dailymotion .....	41
4.4	Canal+ - pay TV.....	42
4.4.1	Canal+’s channel presence on YouTube .....	42
4.4.2	Canal+’s channel presence on Dailymotion .....	44
4.5	Chérie 25 – Thematic channel.....	47
4.5.1	Chérie 25 channel presence on YouTube.....	47
4.5.2	Chérie 25 channel presence on Dailymotion .....	47
<b>5.</b>	<b>The United Kingdom</b> .....	<b>48</b>
5.1	UK broadcasters on YouTube - Summary .....	48
5.1.1	Ranking of broadcasters official YouTube channels and broadcasters web sites ....	49
5.2	BBC – public broadcaster .....	51
5.2.1	BBC’s channel presence on YouTube .....	51
5.2.2	BBC’s channel presence on Dailymotion .....	52

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5.3	ITV – commercial broadcaster .....	53
5.3.1	ITV’s channel presence on YouTube .....	53
5.3.2	ITV’s channel presence on Dailymotion.....	53
5.4	SKY – pay TV .....	54
5.4.1	SKY’s channel presence on YouTube.....	54
5.4.2	SKY’s channel presence on Dailymotion .....	54
5.5	UKTV’s Dave – thematic channel .....	55
5.5.1	UKTV’s Dave channel presence on YouTube.....	55
5.5.2	UKTV’s Dave channel presence on Dailymotion .....	55
<b>6.</b>	<b>Germany.....</b>	<b>56</b>
6.1	German broadcasters on YouTube – Summary tables .....	56
6.1.1	Ranking of broadcasters official YouTube channels and broadcasters web sites ....	57
6.2	ZDF – public broadcaster .....	58
6.2.1	ZDF’s channel presence on YouTube .....	58
6.2.2	ZDF’s channel presence on Dailymotion.....	58
6.3	ProSiebenSat.1 channel presence on YouTube – commercial broadcaster .....	59
6.4	Sky Deutschland channel presence on YouTube – Pay TV.....	60
<b>7.</b>	<b>Italy.....</b>	<b>61</b>
7.1	Italian broadcasters on YouTube – Summary tables .....	61
7.1.1	Ranking of broadcasters official YouTube channel and broadcasters web sites .....	62
7.2	RAI’s channel presence on YouTube – public broadcaster .....	63
7.3	Mediaset - Reti Televisive Italia S.P.A (R.T.I) – commercial broadcaster.....	64
7.3.1	Mediaset/R.T.I’s channel presence on YouTube.....	64
7.3.2	Mediaset/R.T.I’s channel presence on Dailymotion .....	64
7.4	Sky Italia channel presence on YouTube – pay TV.....	64
<b>8.</b>	<b>Spain .....</b>	<b>66</b>
8.1	Spanish broadcasters on YouTube – Summary tables .....	66
8.1.1	Ranking of broadcasters official YouTube channels and broadcasters web sites ....	67
8.2	RTVE channel presence on YouTube – public broadcaster.....	68
8.3	Atresmedia channel presence on YouTube– commercial broadcaster .....	69
8.4	Movistar+ channel presence on YouTube - pay TV.....	71
	Table of tables .....	72

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# 1. Methodology and Limits of note



The objective of this note is to identify the use of video sharing platforms, YouTube and Dailymotion, by broadcasters. The note takes a qualitative approach and is not a comprehensive study of every video (or even in some cases channels) uploaded by broadcasters. We rather identified the main purposes of videos uploaded by our sample of broadcasters in 5 EU countries to their main YouTube and Dailymotion channels and then summarized the main findings. Therefore, the note is a survey and a qualitative assessment of the video content posted on official YouTube channels of 20 broadcasters in EU-5.

## 1.1 Methodology – qualitative survey of channel pages and videos posted

In order to be able to draw observations of the use of video sharing platforms by broadcasters, three to four different types of broadcasters were selected in each of the five countries (France, Germany, the United Kingdom, Italy and Spain). The four different types and the name of broadcasters surveyed are summarised in Table 1.

**Table 1 Selected broadcasters by business model**

	DE	ES	FR	GB	IT
<b>Public</b>	ZDF	RTVE	France Télévisions	BBC	RAI
<b>Commercial</b>	ProSiebenSat.1	Atresmedia	TF1	ITV	R.T.I
<b>Pay TV</b>	Sky Deutschland	Movistar+	Canal+	Sky UK	Sky Italia
<b>Thematic</b>	DMAX	DKiss	Chérie 25	Dave	Fine Living Italy

- The starting point of the overview was the main YouTube (or Dailymotion, if existent) channel page of a broadcaster/broadcaster's group (see Findings and country sections for details). Only official channel pages were considered, on YouTube and Dailymotion these official channels of broadcasters have a verification badge:  (YouTube) and  (Dailymotion), except for RAI for which no official channel with a verification badge could be found (but the channel seems to be official, linking to RAI Play). The verification badges ensure that the channel is officially operated by « the creator, brand, business or organisation represented by the channel », as YouTube states it and allows collecting advertising revenues.
- Once the main channel page of the broadcaster (or of the broadcaster's group) is identified (which, unsurprisingly, is not so evident as a lot of false channels with actual broadcaster or channel names exist), we looked at the format of videos present on the main channel pages and looked at all channel pages directly linked from the main page. In order to monetize their views of videos, YouTube channel operators link their pages between them and declare themselves as official operators of their YouTube channels. We only considered videos on the main channel page (e.g. the page of France Télévisions) and videos on the channels directly linked to on the main page (in the case of France Télévisions, links to further 13 other channel pages, mostly TV programmes such as *Archipels* but also channel such as France 4).



- After the overview of all main channel pages and other channels pages linked on the main channel pages, we classified the format of videos present on channel pages and their purposes. We identified six main formats and purposes of videos posted on channel pages of broadcasters.

The six main uses by broadcasters of YouTube and Dailymotion channels and the videos posted on these channels identified during the survey in October 2016 are:

- **Promotional videos for TV programmes, best ofs:** This format of videos can be promotional videos for channels, corporate communication or upcoming events. Best-ofs are often short video clips showing a special moment of a TV broadcast/show or summarizing a TV show with its best moments, mainly for promotional purposes. These types of videos serve a promotional, branding purpose for the broadcaster or its TV programmes and are also used sometimes for corporate communication purposes.
- **Trailers of TV programmes to come:** These are mostly video clips announcing the future broadcast of a TV show, film or special programme. Their purpose is to communicate to viewers to “tune in” in order to watch the linear broadcast of the advertised content. These types of video clips are similar to trailers broadcasted on linear channels announcing the future broadcast of TV programmes, series or even films and can also be found on the YouTube channel pages of several broadcasters and on channel page of TV shows.
- **Extracts of TV programmes (often for social sharing purposes):** These short video clips, the most common type of video posted on YouTube by broadcasters, are extracts of TV shows and programmes, mostly under 5 minutes and often even under 1 minute. Their main purpose seems to be to entertain viewers with special parts of a TV programme and to encourage sharing on social networks in order to attract clicks and audiences. As most of the surveyed broadcasters’ link directly on their YouTube pages to their catch-up services or websites, this is also a communication tool which aims to attract viewers to the official websites or catch-up services of broadcasters to see the video in full length or to discover other TV programmes made available by the broadcaster. These types of videos can be seen as “appetizers” to attract viewers to the proprietary service of the broadcaster.
- **Catch-up of short format videos (under 20 minutes):** These video clips are mostly under 5 minutes (with a limited number being comprised in the 5 to 20 minutes bracket) of special segments of a TV programme (comedians, sketches, musical performances, interviews, exhibition of a dance or song contests...), short TV programmes (under 5 minutes) or news broadcasts. When broadcasters propose catch-up videos, these are the most common found format. They are mostly videos which the broadcasters produces and in general extracts of TV talk-shows, news broadcast, reality TV shows, entertainment shows but not of real TV series or films.
- **Catch-up of full length videos (more than 20 minutes):** These are video clips exceeding 20 minutes and which allow a true catch-up of a given TV programme. With original digital



content, this is the rarest format of video clips on the YouTube channel pages of broadcasters. When a broadcaster makes such long format catch-up videos available, it is the most of the time only for a limited number of TV programmes (no films or TV series), mostly produced by the broadcaster (TV talk shows, reality TV, news broadcast, documentaries..).

- **Original digital content (e.g. content not broadcasted on linear channels):** This format of video clips was the least found on the channel pages. When there is exclusive original digital content it is the most of the time additional content for broadcasted TV programmes (behind the scenes, making ofs, additional questions in interviews) and rarely true independent digital content (web series, YouTube comedians). The broadcasters which have such content on YouTube have most of the time launched their own digital platforms (in this note, Atresmedia and its platform floxxer, or clipfish owned by RTL Group), acquired MCNs on YouTube or digital creators on YouTube (Canal+'s acquisition of Studio Bagel, ProSiebenSat.1's acquisition of MCN Studio 71). As of October 2016, the majority of broadcasters YouTube channel pages surveyed in this note do not offer true original digital content on their YouTube channels but rather extension to broadcasted shows. The only broadcasters which posted real original digital content to their YouTube channels were those which had already a digital presence and digital original programming. From the pages and broadcasters surveyed, it does not seem that these broadcasters make specific content, equivalent to linear broadcasted TV content, for YouTube (or Dailymotion), except for those which have acquired digital platforms, MCNs and digital studios (Canal+ with Studio Bagel and the acquisition of Dailymotion by its parent company Vivendi, Atresmedia with its digital video platform floxxer).
- From the survey of YouTube channels of selected broadcasters, these six main formats of videos and their specific communication/audience acquisition purposes were found. The approach is qualitative as we did not an in-depth analysis of each video clip posted on channels (duration, link to broadcasted programme) but by surveying the majority of videos posted in the past three years on the channel pages, it seems that these six types of video clips are encompassing the main uses made of YouTube and other video sharing platforms by broadcasters. Short videos in return can be used for branded content by advertisers who which to be associated with a given TV programme.
- Branded content is hard to identify, and with the exception of the majority of public broadcasters, broadcasters engage in some form of branded content on YouTube and other social media networks (example of branded content: Studio71 *Shannara Chronicles Makeover Special* sponsored by Amazon Prime). These videos however represent a very low share of all videos posted on the YouTube channel pages of broadcasters and is mainly used by commercial broadcasters.
- We did not search for any additional YouTube channel page not directly linked on the broadcasters channel page, except for broadcasters in France where we tried to find specific YouTube channel pages for programmes broadcasted on linear TV channels (see Annexes). The results presented in these note should therefore only be seen as an overview of videos present





on the official pages operated by broadcasters, specific YouTube channels for TV programmes may exist and if they were not indicated on the main pages, are not part of the results in this note.

As for YouTube (and Dailymotion) channels, 3 different types of channels operated by broadcasters were found:

- **Channel/Corporate**: The YouTube channel is branded by the channel name or the name of the broadcasting group (e.g. the YouTube channel BBC). These YouTube channels serve to communicate around the programmes broadcasted on the linear channel or by the broadcasting group, for promotional purposes, corporate communications and to show mainly extracts of programmes broadcasted.
  - **Programme**: The YouTube channel is specifically branded by the name of the TV programme broadcasted (e.g. *Top Gear* by the BBC). These channels serve mainly to show extracts and best-ofs of the TV programmes, announce upcoming episodes and in some cases to make additional content available, like behind the scenes or Making-ofs. In some case, these channels also serve for short-format catch-up like the channel *Action Discrète* by Canal+ (mostly for programmes broadcasted on linear TV and with durations under 5 minutes)
  - **Digital**: The channels are purely digital and do not have videos of programmes broadcasted on linear channels. These channels are mainly pure digital players, often acquired by the broadcasters such as *Studio71* of ProSiebenSat.1 or *Studio Bagel* of Canal+, or launched by them such as Flooxer by Atresmedia.
- Also, as the survey is very time intensive (the number of videos posted on different pages of broadcasters are in the range of 1000 to over 10 000 videos per broadcaster), France is a case-study with a longer analysis of the content offered in each channel of the broadcasters YouTube and Dailymotion pages. The other country profiles present the raw data collected during the desk research, comScore audience figures for the broadcasters website and YouTube channels (when available) and summary tables of the main findings.
  - To check the presence on other video sharing platforms we chose Dailymotion, the second most visited video sharing websites in most of the countries. However, the results are clear: except Canal+ (whose parent company Vivendi has acquired Dailymotion) and to a certain limit France Télévisions, no real use of Dailymotion is made by the other broadcasters that we have aware of.
  - Broadcasters surveyed in this report all have their own websites and catch-up services, which are the places where they make available the most of their content for catch-up viewing (most of these platforms are however not accounted for in the comScore statistics). All broadcasters refer to their main catch-up site or their website in order to encourage viewers to visit to watch the full length programme or other programmes broadcasted. In this case, YouTube serves mainly as an audience acquisition platform for the broadcasters.
  - For statistics of YouTube channels, the number of subscribers and videos are the addition of all subscribers and videos of each YouTube channel to which the main page of the broadcasters link



directly.

- YouTube seems to be the prime focus of broadcasters when it comes to video sharing platforms (in addition to social networks such as Facebook, Snapchat or Twitter). Managing a digital channel presence is time-consuming; the more if the broadcaster owns several channels. Operating YouTube channels coupled to a social media presence in order to promote their content, to communicate on linear broadcasts and to attract viewers to their own websites and video services seems to satisfy the broadcasters surveyed in this note, which for the majority did not operate a page on Dailymotion.
- Also, it should be noted that several broadcasters only propose short extracts of TV programmes on their channels with the mention and a direct link to their own website and/or service in order to watch the full length programme. YouTube therefore seems to really serve communication purposes more than to allow full catch-up viewing of the programmes broadcasted on linear channels.
- All statistics for YouTube channels, subscribers and videos are only valid the day they have been collected; on YouTube, these figures change by the hour. We have collected these datasets in October 2016 and they will be no more up to date at the time of publishing of this note.



## 1.2 Limits of Note

- Only the official YouTube channel page of the channel and the attached channels are part of the analysis. In general, broadcasters operate a main YouTube page with additional links to official YouTube channels of traditional broadcasting channels owned by the broadcaster and their programmes. Other channel pages of broadcasters and their programmes may exist but are not part of this study due to difficulties in identifying channels for each specific TV programme. Therefore this overview may not be complete and specific channel pages of TV programmes could be missing.
- The overview is not exhaustive, other channels for specific programs may exist which were not seen during the survey, as not every broadcaster lists all of its channels on its main YouTube channel page.
- The classification takes into account the official page broadcasters' channel, the links to other YouTube channels operated by the broadcasters and links to programmes of the broadcasters' main channels. For broadcasters in France, additional research has been carried out on the presence of specific programmes broadcasted on linear channels.
- Original digital content is difficult to identify without specific notification or knowledge of the programmes of the broadcaster. Therefore, some original digital content may not have been included or seen in this note. Most of the time however, content only made available in the digital space is identified by broadcasters (bonus content such as exclusive add-ons to actual linear broadcasts, behind the scenes, 360° and VR content).
- YouTube channels list often more than thousands videos, therefore it is possible that other formats of videos were not discovered in the sample analysis. However, we checked all videos posted in the past three years and beyond. Therefore without a major oversight, we deem that the main formats of videos posted are included in the note.
- Long form catch-up videos are rare. However, in several cases the broadcasters channels proposed one to three programmes for long format catch-up (programmes exceeding 20 minutes). These long format catch-up videos are often of specific programmes, mostly produced and fully owned by the broadcasters and are mainstream programmes (not scripted TV series or films), news programmes or reality TV shows. Therefore, when long format catch-up is checked in the summary tables, one should be aware that it is only for a limited number of programmes and is not equivalent to true catch-up services like these operated by broadcasters.
- For comScore audience figures, they only reflect video consumption on the fixed internet. As 51% of online video plays on mobile devices worldwide in 2016, as stated by Ooyala, this represents a major caveat. Also, it was not always clear if the viewing figures for YouTube channels are actually for the official YouTube channel (ZDF, Sky Germany, Movistar+) and for some broadcasters viewing figures are aggregated for the broadcasters group whole website (Vivendi's website for Canal+). Another caveat is that for some broadcasters' web pages, catch-up viewing is included, for others not (which can be seen in the minutes per viewers and videos per viewer figures mostly). As some catch-up services are behind walled gardens, not measured by comScore, this renders comparison between YouTube channels and catch-up viewing impossible.



## 2. Main Findings

### 2.1 Executive summary - General overview

#### ■ On the use of YouTube by broadcasters

- The main use of YouTube channels for broadcasters of all business models seems to be for branding, promotional, marketing and communication purposes rather than providing full catch-up services for viewers.
- Short extracts of programmes are the type of videos most listed on channel pages operated by broadcasters. These videos highlight interesting passages of broadcasted TV programmes and their main “*raison d’être*” seems to be for branding, social video sharing purposes and to attract audiences to TV programmes, available on catch-up or on the linear broadcast.
- Public and pay TV broadcasters engage less in branded content than commercial broadcasters and are rather advertising their own channels and TV programmes.
- All broadcasters use YouTube channel pages to promote their own web sites and catch-up services. Most of the time, the broadcasters indicate that full length videos of the extracts are free to view on their own catch-up services.
- Catch-up videos available on YouTube channels are mostly short format (under 20 minutes, mostly under 5 minutes) of TV programmes produced and/or owned by the broadcasters.
- No surveyed broadcaster makes films or scripted TV series available on YouTube.
- Long format catch-up videos are rare and concern only a limited number of mainstream programmes, news reports and interviews.
- Broadcasters also maintain a presence on YouTube and other social media networks to offer branded entertainment opportunities to advertisers (sponsoring content, partnerships for content such as ITVs *Knitted Ad Break*) and to monetize their posted video clips through advertising. This approach is mostly taken up by commercial broadcasters, as it is a complement to their traditional business model and is not widely used on the surveyed YouTube channels at this period.
- “True” original digital content is not produced by the majority of broadcasters surveyed for their YouTube channel presence. If existent, these digital contents consist mostly of bonus programming for linear broadcasted TV programmes: behind the scenes videos, interviews, making ofs, 360 and Virtual Reality videos and add-ons/extension of linear programmes.



- The only three broadcasters which had “true” digital content on their YouTube channels (not linked to any linear TV programme and with some production investments) were broadcasters which had acquired or launched their own digital services or Multi-Channel Networks on YouTube: Canal+ with Studio Bagel, ProSiebenSat.1 with Studio71 and Atresmedia with Flooxer.
- Other investments and partnerships between surveyed broadcasters and Multi-Channel Networks include ITV’s minority stake in MCN Channel Mum in 2015 (its first investment in a MCN), the partnership between TF1 Publicité and MCN Finder Studios for advertising. ITV acquired reality TV producer Talpa Media B.V. (in 2015 for GBP 355 million) which launched over 100 YouTube channels for its shows (*The Voice* being one of the most known). France Télévisions launched Studio4, its digital creation platform (however, no link on the France Télévisions main YouTube channel page). However, these channels were not directly linked on the broadcasters YouTube channel pages but do also produce digital content, such as web series.
- It is very difficult to identify YouTube channels of a broadcaster’s YouTube channel network when they are not identified and linked to on the channel page as such. A substantial number of YouTube channels owned/operated by a broadcaster, which are not linked to its main channel page, could therefore be missed. Existing tools and services to identify channels owned by a network proved to be not fully reliable by returning channels without any link to a given YouTube network of a broadcaster (during the report, Vidooly and Socialblade have been tested). Assessing the full channel presence of a broadcaster on YouTube remains therefore a challenge. The trend however is towards establishing networks of YouTube channels which in turn allows to better monetize videos (through advertisements and branded content).
- Surprisingly, broadcasters did not promote their own pay VOD services (Subscription or Transactional) when they operated one (apart from ProSiebenSat.1 which links to MyVideo, which in return promotes Maxdome). Links and promotional posts were mostly for their catch-up services, web sites and other social media channels (Facebook, Twitter, Google+, Vine, Instagram – and not yet Snapchat, another surprise).
- Broadcasters will brand more YouTube channels per TV programme names than linear channel names (e.g. A channel branded *Top Gear* rather than BBC). A viewer will first search for the title of a given TV programme rather than for the name of the broadcasting channel. As not all broadcasters linked to all of their YouTube channel pages on their main pages, some channels might have been overseen. In almost all cases, YouTube channels branded by TV programmes had significantly more subscribers than the broadcaster’s YouTube channel branded by their linear channel name.



- Apart Canal+ (whose parent company Vivendi owns Dailymotion) and France Télévisions, no broadcaster had a channel presence on Dailymotion. This came as a surprise as Dailymotion is in most of the country the second most visited pure video sharing platform (excluding Facebook). In Germany, we searched also on clipfish, owned by RTL Group, on which it appears not be possible to operate channels, and we did not find a true presence of other German broadcasters on this platform (music and short clips exist but it does not appear that they are effectively managed by the broadcasters).
  
- **On viewing figures for broadcasters' YouTube channels and web sites (comScore)**
  - The comScore viewing figures indicate (when existent and measured) that most of catch-up viewing in terms of minutes spend per viewers is rather done on their own web sites or catch-up services.
  
  - Broadcasters which registered the highest time spend on their YouTube channels were broadcasters which had acquired MCNs and pure digital studios: Canal+, ProSiebenSat.1 and Atresmedia.
  
- **On Multi-Channel Networks**
  - The broadcasters with the highest number of acquisitions in the Multi-Channel Network ecosystem in Europe were RTL Group, ProSiebenSat.1 and the Modern Times Group. Of the surveyed broadcasters, Canal+ and ITV made also investments and acquisitions of MCNs. Another active player during the time period 2012-2016 was Sky UK with its investment along several other investors in MCN Whistle Sports, a sport-centered MCN. The amounts invest (see Table 16) illustrate the rising importance these digital networks have for traditional players. Also, MCNs have started on YouTube mainly but are now taking the role of representing the content on every major OTT video outlet and social media and are no longer confined to the YouTube space.
  
  - MCN serve the dual purpose for commercial broadcasters of reaching an audience which no longer tunes in to their linear programmes (younger generations) and to offer an attractive advertising space to its advertisers which want to reach these younger generations. Advertising formats on these digital channels consist of traditional video advertising but also increasingly of branded, sponsored content and product placement.
  
  - These MCNs operate a large quantity of channels, federating creators and engaging in the monetizations of creative content. Recently, MCNs do no longer only manage and market channels and federate audiences. With the acquisitions by media groups, they have increasingly taken part in content creation (web series but also short films and even for some, theatrical films such as *Smosh: The Movie*).



## 2.2 Public broadcasters in EU-5

All public broadcasters are using YouTube in order to make extracts of TV programmes available, to promote upcoming programming through the use of trailers and, to a certain extent, for short format catch-up of mainstream TV programmes often produced and fully owned by the broadcasters. This promotional aspect can be seen in the links made to their own websites and catch-ups services from their main page (it should be noted that the RAI page is lacking the official check). Also the broadcasters link to their social media pages: Facebook, Twitter, Instagram and Google+ mainly.

### ■ Links for promotional/marketing purposes on YouTube channel pages by public broadcasters

Links to official websites or catch-up services by public broadcasters from their main YouTube channel page:

- France Télévisions pages link to its website <http://www.francetelevisions.fr/> and a variety of programme channels link directly to the catch-up viewing platform for the given programme (such *C a vous*).
- ZDF page links to its Mediathek and main website <http://www.zdf.de/>
- The BBC links to the iPlayer (with the mention full programmes on BBC iPlayer) and to The Apprentice programme page (a promotional campaign for the TV programme)
- RAI links to its catch-up platform RAI Play (the main page lacks the official check)
- RTVE links from its main page to its main website <http://www.rtve.es/>, to the direct broadcast of La1 in direct, to RTVE à la carta and to its mobile application, RTVE Movil.

### ■ Use of YouTube videos by public broadcasters

Promotional videos and best-ofs of TV programming are used by 4 out of 5 public broadcasters. Only 4 broadcasters have a limited quantity of videos not directly sourced from linear broadcasted programmes; however, these programmes should not be fully considered as original digital programming (except for the BBC and its BBC Three online channel, which is no longer broadcasted linearly) but rather as add-ons to broadcasted TV programmes, behind the scenes videos, VR and 360 videos (not suited for a linear broadcast). In the case of RTVE, original digital content consisted of web series made by the students of the Instituto RTVE YouTube channel.

Concerning long format catch-up, we have only identified videos above 20 minutes of full programming posted on channel pages of France Télévisions and ZDF. These videos however concerned only a limited number of mainstream TV programmes (*Archipels*, *Retour aux sources*, *Investigations*, *On n'est pas couché*, *Infrarouge* for France Télévisions, each of these programmes having their own channel page; for ZDF, long format catch-up were rather interview extracts of news shows and not specific TV programmes). It should be noted, that as for France Télévisions, broadcasters could very well have YouTube channels with full length catch-up of specific TV programmes which are not found or linked to on their main YouTube page (such as the programme *J'irai dormir chez vous*, *Cash Investigations* (lacking the official check) or *Faites entrer l'accusé* which each have their own YouTube channel and offer their full length TV programmes for catch-up purposes). However, if long format catch-up is available, it is only for TV programmes fully owned by the broadcasters (and mainly mainstream programming, news programming and documentaries).



Table 2 Summary of YouTube uses - format of videos by public broadcasters in EU-5

	Promotional videos for TV programmes and 'best-ofs'	Trailers of TV programmes to come	Extracts of TV programmes	Catch-up full length videos (>20 min)	Catch-up short format videos (<20 min)	Original digital content
France Télévisions (FR)	X	X	X	X	X	X*
BBC (GB)	X	X	X		X	X
ZDF (DE)	X	X	X	X	X	X**
RAI (IT)	X	X	X		X	
RTVE (ES)		X	X		X	X***
<b>Percentage use</b>	<b>80%</b>	<b>100%</b>	<b>100%</b>	<b>40%</b>	<b>100%</b>	<b>80%</b>

Source: OBS desk research October 2016

\*For France Télévisions, original digital content seems to be limited and under the form of bonuses or add-ons to actual programmes, no real digital productions.\*\* For ZDF, original digital content were Virtual Reality and 360 degrees videos \*\*\* For RTVE, original digital content consisted of web series made by students of its Instituto RTVE channel

#### ■ Types of YouTube channels used by public broadcasters

Table 3 Types of YouTube channels used by public broadcasters EU-5

	Channel / Corporate	Programme	Digital	Total
France Télévisions (FR)	2	11	0	13
BBC (GB)	15	5	1*	21
ZDF (DE)	3	6	0	9
RAI (IT)	1**	0	0	1
RTVE (ES)	2	1	0	3
<b>Total</b>	<b>23</b>	<b>23</b>	<b>1</b>	<b>47</b>
<i>In percentages (total)</i>	<i>49%</i>	<i>49%</i>	<i>2%</i>	<i>100%</i>

Source: OBS desk research October 2016 \* BBC Three is no longer a linear TV channel\*\* On its YouTube page info, RAI list 20 YouTube channels, however its page does not linked to any other channel and lacks the official verification check.

Regarding the types of YouTube channels used by public broadcasters, 2 different profiles appear. France Télévisions links to channels branded by its programmes (such as *Investigations*), whereas the BBC links more to channels branded by its linear channels or radios names (such as BBC News). Only one true digital YouTube channel is used by the public broadcasters, namely BBC Three which is only available online. ZDF promotes also more its programmes than its channels on YouTube, and tries to drive audiences to its Mediathek for true catch-up viewing. For RAI and RTVE, the low number of YouTube channel pages associated on their main page either indicates that during the survey we have missed channels/programmes pages, either that both broadcasters do not heavily rely on YouTube and uniquely use the service as a promotion/communication and branding tool to drive audiences to their websites and catch-up services.





## ■ Main statistics and comScore viewing figures

**Table 4 Main statistics on YouTube channels of public broadcasters EU-5**

	Number of YouTube channel pages	YouTube subscribers (cumulated)	YouTube videos (cumulated)
France Télévisions (FR)	13	412 104	11 552
BBC (GB)	21	15 295 965	47 869
ZDF (DE)	9	781 123	3 616
RAI (IT)	1	1 346 967	3 873
RTVE (ES)	3	171 629	6 881

Source: OBS desk research October 2016 \* BBC Three is no longer a linear TV channel

As for YouTube statistics, for YouTube channels directly linked on the main page, the BBC makes the most intensive use of YouTube with 21 channels and 47 869 videos. In return, the BBC boosts much more subscribers than all other public broadcasters, above 15 million. The only other public broadcaster counting more than 1 million subscribers is RAI. France Télévisions, even if the cumulated channels have over 11 500 videos, has below 500 000 subscribers to its 13 channels (it should be noted that we discovered several channels of programmes broadcasted on France Télévisions which were however not linked to its official channel page).

**Table 5 Main statistics on broadcasters YouTube channels and website (viewers, minutes and videos) in their respective countries, in units**

	Unique Viewers YouTube channel	Minutes per viewer YouTube channel	Videos per viewer YouTube channels	Unique Viewers broadcasters websites	Minutes per viewer broadcasters websites	Videos per viewer broadcasters websites
France Télévisions	4 189 000	22,2	5,9	3 459 000	3,2	9,4
BBC	1 968 000	12,2	4,1	3 889 000	6,7	4,6
ZDF*	960 000	10,3	3,1	591 000	91,5	5,6
RAI	500 000	9,1	3,4	3 899 000	9,4	7,2
RTVE	236 000	5,7	2,6	1 575 000	136,1	36,7

Source: comScore Video Metrix – June 2016, viewing figures are only for the country of establishment of the broadcaster (e.g. BBC statistics are only for the United Kingdom). For a more detailed overview, please refer to country sections.

\*For ZDF's YouTube channel, as several channels exist and it would be false to culminate the figures, zdf cid @ YouTube has been chosen for the main figures on YouTube channels

From the viewing figures, difference among broadcasters appear (comScore however does not appear to measure catch-up viewing on France Télévisions, BBC's iPlayer and RAI web sites, flawing thus the comparison). For ZDF and RTVE, the viewing figures (minutes and videos per viewer) clearly indicate that catch-up viewing is rather happening on their web services: 91.5 minutes per viewer for ZDF and 136.1 minutes per viewer for RTVE in June 2016. Even if ZDF attracts more viewers to its YouTube channels than website, the larger part of time spend viewing videos is done on its web site. For RTVE, the low number of unique viewers of its YouTube channels shows clearly that viewers will catch-up on their TV programmes on the broadcaster's web site. In summary, for broadcasters where catch-up viewing is measured on their web sites, it appears clearly that this form of viewing takes place on their own web sites and catch-up services rather than on their YouTube channels; in view of the formats of videos posted on YouTube, this comes to no surprise.



## 2.3 Commercial broadcasters – EU-5

### ▪ Links for promotional/marketing purposes on YouTube channel pages by commercial broadcasters

As it was the case for public broadcasters, the most common use of videos posted to their YouTube channels by commercial broadcasters are promotional videos and extracts of TV programmes.

These broadcasters also include direct links to their websites and catch-up services for viewers in order to see the full programmes (and social media pages) from their main YouTube channel:

- TF1 links directly to <http://www.tf1.fr/> which allows viewers to catch-up on full programmes
- ITV links directly to the ITV Hub and its website <http://www.itv.com/>
- ProSiebenSat.1 links directly to its website <http://www.prosieben.de/>, Studio71 and Myvideo page (its promotional website for its VOD service Maxdome)
- R.T.I./Mediaset links directly to its website <http://www.mediaset.it/>
- Atresmedia promotes mainly its digital platform [flooxx.com](http://flooxx.com) (and, surprisingly, not its catch-up service Atresplayer) on YouTube

It should be noted that these players do not promote their paying VOD services, when they operate one on their YouTube pages (MyTF1VOD for TF1, Mediaset Infinity), except ProSiebenSat.1 which links to its promotional website MyVideo (which itself is a promotional web site for its SVOD and TVOD service Maxdome).

### ▪ Use of YouTube videos by commercial broadcasters

The main difference with public broadcasters is that no full length catch-up could be found on the channel pages of commercial broadcasters. As they all link to their websites and catch-up services, they seem to operate their YouTube presence mainly for promotional purposes of their programmes and to allow extracts of TV programmes to be shared on social media. Short format catch-up videos have been found on pages of 3 commercial broadcasters.

Atresmedia (flooxx) and ProSiebenSat.1 (Studio71) are the only 2 broadcasters which make “true” original digital content available on YouTube, mainly productions of their acquired MCNs and digital video platforms. For ITV and TF1, digital content consists in behind the scenes videos and add-ons to programmes which are linearly broadcasted.

YouTube seems to serve mainly promotional purposes for the surveyed broadcasters; promotion of their TV programming, promotion for their digital services (ProSieben, Atresmedia) and to announce upcoming TV programmes through the use of trailers.

**Table 6 Summary of YouTube uses - format of videos by commercial broadcasters in EU-5**

	Promotional videos for TV programmes and 'best-ofs'	Trailers of TV programmes to come	Extracts of TV programmes	Catch-up full length videos (>20 min)	Catch-up short format videos (<20 min)	Original digital content
TF1 (FR)	X	X	X			X*
ITV (GB)	X	X	X		X	X**
ProSiebenSat.1 (DE)	X	X	X		X	X***
R.T.I (IT) / Mediaset	X		X			
Atresmedia (ES)	X	X	X		X	X****
<b>Percentage use</b>	<b>100%</b>	<b>80%</b>	<b>100%</b>	<b>0%</b>	<b>60%</b>	<b>80%</b>



Source: OBS desk research October 2016\*For TF1, original digital content seems to be limited and under the form of bonuses or add-ons to actual programme and the digital channel of Chris Marques.\*\* Original digital content was posted on the X Factor UK page and consisted of "exclusive backstage clips", add-ons to a linear broadcasted programme. \*\*\* ProSiebenSat.1 original digital programming is content posted on its Studio71 page, the MCN which the company acquired \*\*\*\* mainly original digital content of its flooxer video site and digital videos for its news websites.

## ■ Types of YouTube channels used by commercial broadcasters

Table 7 Types of YouTube channels used by commercial broadcasters EU-5

	Channel / Corporate	Programme	Digital	Total
TF1 (FR)	5	11	2	18
ITV (GB)*	3	3	0	6
ProSiebenSat.1 (DE)	2	15	2	19
R.T.I (IT) / Mediaset	1	3	0	4
Atresmedia (ES)	9	15	8	32
<b>Total</b>	<b>20</b>	<b>47</b>	<b>12</b>	<b>79</b>
<i>In percentages (total)</i>	<i>25%</i>	<i>59%</i>	<i>15%</i>	<i>100%</i>

Source: OBS desk research October 2016

\*We found additional 7 ITV channels not linked on the main page. 6 of these channels were for programmes with short extracts, trailers, best-ofs: Lorraine, Good Morning Britain, Loose Women, Judge Rinder, The Jeremy Kyle Show, Channel Mum and one for trailers for upcoming programmes ITV First Look. The format of the videos posted on these channels are similar to these posted in the other YouTube channels of ITV. As they were not linked on the main channel, and to respect the methodology, these channels were not integrated in the figures but illustrate the difficulties for a comprehensive overview of a broadcasters channel presence on YouTube.

For the surveyed commercial broadcasters and their links on YouTube channel pages, the figures indicate that these players mostly link to programme channel pages, as users will most certainly start by searching by the name of TV programmes. Their corporate or channel page is rather limited (20) when compared to the number of channel pages available for TV programmes (47). Atresmedia heavily promotes its digital presence on flooxer and different websites operated by the media group. The digital channels of TF1 are rather small; a channel by a juror of a dance contest show where videos of his performances are posted (LeChrisMarques) and a very small channel presence in order to promote its children service, TFOU Max, with only 6 videos posted on the page.

## ■ Main statistics and comScore viewing figures

Table 8 Main statistics on YouTube channels of commercial broadcasters EU-5

	YouTube channel pages	YouTube subscribers (cumulated)	YouTube videos (cumulated)
TF1 (FR)	18	467 725	3 946
ITV (GB)	6	12 013 022	10 656
ProSiebenSat.1 (DE)	19	3 419 000	6 880
R.T.I (IT) / Mediaset	4	33 684	1 499
Atresmedia (ES)	32	3 259 084	68 053

Source: OBS desk research October 2016



For commercial broadcasters, the most subscriptions seem to be to programme channels of reality TV shows and mainstream programmes (see country section for details). TF1 with *The Voice* (118 848 subs) and *The Voice Kids* (75 319 subs); ITV with its *Britain's Got Talent* page (6 663 332 subs) and *The X Factor UK* (5 077 161 subs) or 94% of its total cumulated subs; ProSiebenSat.1 with its informational programmes *Galileo* (1 034 454 subs) and *taff* (612 225 subs). Atresmedia and Mediaset have more subscribers for their channel and corporate pages; 1.96 million subs to the channel page of Antena3 and 22 809 subs to the Mediaset page.

Atresmedia channel page is either the commercial broadcasters which has linked to most of its YouTube channel owned or is the most active player on YouTube of these 5 commercial broadcasters with 32 YouTube channel pages. Of course, other channel pages for specific programmes which were not found and included in this survey could exist.

**Table 9 Main statistics on broadcasters YouTube channels and website (viewers, minutes and videos) in their respective countries, in units**

	Unique Viewers YouTube channel	Minutes per viewer YouTube channel	Videos per viewer YouTube channels	Unique Viewers broadcasters websites	Minutes per viewer broadcasters websites	Videos per viewer broadcasters websites
TF1	473 000	11,3	5,1	4 698 000	4,9	14,5
ITV	1 724 000	24,8	8,1	2 650 000	20,3	57,1
ProSiebenSat.1*	5 423 000	47,1	15,3	9 169 000	6,3	5,9
R.T.I./Mediaset	101 000	6,2	3,3	5 516 000	6,2	17,9
Atresmedia	1 907 000	29,8	9,6	1 992 000	140,3	7,5

Source: comScore Video Metrix – June 2016, viewing figures are only for the country of establishment of the broadcaster (egg. TF1 statistics are only for France). For a more detailed overview, please refer to country sections.

\*ProSiebenSat.1's YouTube channels and presence are managed under the entity of its acquired MCN Studio 71.

From the comScore viewing figures, it seems that catch-up viewing is only measured on ITV's and Atresmedia's web sites/services (the minutes per viewer for TF1, ProSiebenSat.1 and Mediaset appear to be too low to reflect true catch-up viewing). TF1 and Mediaset attract a relative low number of unique viewers per month on their YouTube channels, which in light of the format of videos posted on their channel pages is comprehensible; short format, mainly promotional videos and trailers. ITV's and Atresmedia's YouTube channels attract a relative high number of unique viewers per month, which spend above 25 minutes watching videos on their channels. Atresmedia with its high number of channels and ITV with its two successful programmes manage to interest viewers in their content. The figures are really interesting for ProSiebenSat.1; by acquiring Studio71 and integrating their own YouTube channels under the management of this MCN, they are relevant to the YouTube area. Viewers watched on average 47.1 minutes of videos on Studio71 branded channels and the mean age for its viewers is 32.1 years (compared to a median age of YouTube channels viewers of TF1 of 34.7 years, ITV of 32.6 years, Atresmedia of 35 years and Mediaset of 32.2 years, please refer to Table 24, Table 37, Table 48, and Table 66).

For Atresmedia's web site viewing figures, the bulk of time spend is on its Atresplayer, its catch-up service (refer to Table 67) which on its own attracted 1.18 million unique viewers in June 2016 which spent 176.7 minutes watching content on this catch-up player. Even if Atresmedia is the commercial broadcaster with the strongest YouTube channel presence (apart from Studio71, a pure digital player), catch-up viewing still takes place on its own catch-up service. It seems that apart Studio71, the bulk of catch-up viewing happens on broadcaster's own services (which could also be inferred from the format of videos and number of subscribers from their YouTube channels). The advertising revenue sharing model with Google's service could be a reason behind this fact, as it is more profitable for commercial broadcasters to monetize their content on their own services.



## 2.4 Pay TV – EU-5

### ■ Links for promotional/marketing purposes on YouTube channel pages by pay TV players

The direct links made from their main YouTube pages are:

- Canal+ links to its websites and subscription offers <http://www.canalplus.fr/> and <http://www.lesoffrescanal.fr/> but does not directly propose a link to its catch-up platform on its main page; however links are made from programme channels to the catch-up of these programmes, such as for *Le Dézapping du Before*
- Sky UK & Ireland promoted its Sky Q box in October 2016 directly from its main page and to its website <https://www.sky.com/>. There is however no direct link to its OTT offers and official YouTube page of Sky Now TV on the main page of Sky UK.
- Sky Deutschland links directly to its webpage <http://www.sky.de/> in addition to its several social media pages for its programming
- Sky Italia only links directly to its website <http://www.sky.it/>
- Movistar+ links to its website <http://www.movistar.es/particulares/movistarplus> to enhance subscriptions and to its catch-up platform for full programmes (Programas Completos) for viewers which are already subscribers <http://ver.movistarplus.es/>

Here again, these players do not directly promote their pay VOD services (Sky Now, Sky Ticket and Online, Canalplay and CanalplayVOD, Yomvi) on their YouTube pages. As the broadcasters before, they do also link directly to their own catch-up platform or websites, in addition to their pages on social media sites such as Facebook, Twitter, Google+ Instagram and Vine.

### ■ Use of YouTube videos by pay TV players

As the broadcasters before, the main formats of videos used by pay TV broadcasters are for promotional purposes, trailers and extracts of TV programmes. Catch-up for short format videos are used by 4 out of 5 of pay TV broadcasters (mostly short clips and sketches under 3 minutes) whereas long format catch-up is reserved for a selected number of TV programmes (see footnotes). Original digital content was only identified on the channels of Canal+, namely on its Studio Bagel, Studio Gaming and Studio Movies channels which are all pure digital players which have been acquired by Canal+.

These broadcasters use therefore also YouTube for mainly promotional and social sharing purposes.

**Table 10 Summary of YouTube uses - format of videos by pay TV broadcasters in EU-5**

	Promotional videos for TV programmes and 'best-ofs'	Trailers of TV programmes to come	Extracts of TV programmes	Catch-up full length videos (>20 min)	Catch-up short format videos (<20 min)	Original digital content
Canal + (FR)	X	X	X	X**	X	X*
Sky (GB)	X	X	X			
Sky Deutschland (DE)	X	X	X		X	
Sky Italia (IT)	X	X	X	X***	X	
Movistar+ (ES)	X	X	X	X****	X	
<b>Percentage use</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>60%</b>	<b>80%</b>	<b>20%</b>

Source: OBS desk research October 2016 \* Original digital content is produced by Canal+'s digital studio Studio Bagel, Studio Gaming and Studio Movie. \*\*Long format catch by Canal+ only of one TV programme, Clique which consists of interviews of artists \*\*\*Long format



catch-up on Sky Italia's YouTube channel consists of several interviews/news programmes \*\*\*\* Movistar makes available the programmes *Illustres Ignorantes* and *Informe Robinson* in long format catch-up and several interviews of its news and late night shows

### ■ Types of YouTube channels used by pay TV players

As for public broadcasters, there are two uses when looking at the type of channels promoted by pay TV broadcasters. Canal+ links mainly to YouTube channel pages of its programmes and creators whereas as Sky UK links mainly to its channels and corporate YouTube pages. Movistar+ and Sky Italia almost equally link to channel and programmes YouTube pages whereas Sky Deutschland mainly promotes its channels, of which Sky Sports has the most subscribers (505 216 out of cumulated total of 524 404 subscribers for the 3 Sky Deutschland YouTube channel pages).

**Table 11 Types of YouTube channels used by pay TV broadcasters EU-5**

	Channel / Corporate	Programme	Digital	Total
Canal + (FR)	3	13	4	20
Sky (GB)	9	3	1	13
Sky Deutschland (DE)	3	0	0	3
Sky Italia (IT)	2	3	0	5
Movistar+ (ES)	2	3	0	5
<b>Total</b>	<b>19</b>	<b>22</b>	<b>5</b>	<b>46</b>
<i>In percentages (total)</i>	41%	48%	11%	100%

Source: OBS desk research October 2016

### ■ Main statistics and comScore viewing figures

**Table 12 Main statistics on YouTube channels of pay TV broadcasters EU-5**

	YouTube channel pages	YouTube subscribers (cumulated)	YouTube videos (cumulated)
Canal+ (FR)	20	9 148 747	2 222
Sky (GB)	13	1 109 569	12 935
Sky Deutschland (DE)	3	524 404	2 940
Sky Italia (IT)	5	1 078 315	2 969
Movistar+ (ES)	5	673 676	5 882

Source: OBS desk research October 2016

Canal+ and Sky UK are the pay TV broadcasters of the sample which most actively use YouTube. However, Canal+ counts the most subscribers for its digital studio Studio Bagel (2.7 million subs) and for the pages of short programming under 3 minutes such as *Les Tutos* (2.1 million subs) and *Le D ezapping* (804 061 subs) or *Bloqu es* (747 436 subs) (the main Canal+ page counts only 93 900 subs). For Sky UK it is mostly its Sky News channel page (417 438 subs) and its Soccer AM page (411 751)



which find their audiences (the main page counting only 26 188 subs). Sky Deutschland gets its most subscribers from its Sky Sport HD YouTube page (505 216 subs) whereas its main page counts only 11 484 subs. Sky Italia entices subscribers mostly for its YouTube pages of 3 programmes, *X Factor Italia* (240 704 subs), *Master Chef Italia* (544 112 subs) and *Italia's Got Talent* (170 952 subs). The same is the case for Movistar+ which gets most of its subscribers for its programme *El Dia Despues* with 382 660 subs, *Late Motiv* with 95 7113 subs and *Illustres Ignorantes* with 94 342 subs.

**Table 13 Main statistics on broadcasters YouTube channels and website (viewers, minutes and videos) in their respective countries, in units**

	Unique Viewers YouTube channel	Minutes per viewer YouTube channel	Videos per viewer YouTube channels	Unique Viewers broadcasters websites	Minutes per viewer broadcasters websites	Videos per viewer broadcasters websites
Canal+*	3 340 000	27,3	10,5	3 063 000	157,8	14,7
Sky (GB)	143 000	6,3	2,2	3 389 000	73,4	16,2
Sky Deutschland**	n.a.	n.a.	n.a.	259 000	25,3	4,1
Sky Italia	261 000	7,9	3,6	1 864 000	49,1	6,2
Movistar+**	n.a.	n.a.	n.a.	382 000	11,1	6,4

Source: comScore Video Metrix – June 2016, viewing figures are only for the country of establishment of the broadcaster (egg. Movistar statistics are only for France). For a more detailed overview, please refer to country sections.

\*For Canal+ websites, Vivendi websites have been taken into account as it is not possible to make a distinction for unique viewers among the different Vivendi websites. Canal-plus.com is the websites for subscribers to Canal+ whereas Canalplus.fr is open to all, which can be seen in the differences of number of minutes per viewer and minutes per video for the 2 websites. (See the section on France for more details)

\*\*In the comScore figures on YouTube channels, no Sky and Movistar+ branded YouTube channel has been found (could possible exist under another brand name).

The viewing figures for pay TV are clearer than those of the two broadcasters before. The main part of catch-up viewing is done on their own website or service (except for Movistar+ for which comScore seems to not measure catch-up viewing). Regarding YouTube channels, Canal+ boosts the most viewers, surely lifted by the acquisition of Studio Bagel and the several YouTube channel pages allowing for short format catch-up of its sketches and comedians. By allowing short format catch-up of its popular segments of its TV programmes, they manage to federate an audience, in addition to its well-developed presence on Dailymotion (see Table 30).

Pay TV players use of YouTube appears to be mainly for promotional purposes and to communicate around their programmes. Except Canal+ (and the Sky News page for Sky UK), they do not seem to make a greater use of YouTube and attract a significant higher number of viewers on their own websites or catch-up services. Pay TV players will not monetize large chunks of their TV programming on YouTube; they sell subscriptions and not advertising inventory.





## 2.5 Thematic channels – EU-5

### ■ Links for promotional/marketing purposes on YouTube channel pages by pay TV players

As the other broadcasters, thematic channels link also to their websites and catch-up services for full viewing of programmes and to their pages on social media:

- Chérie 25 links to its web site, hosted at its parent company NRJ Group <http://www.nrj-play.fr/cherie25/c-est-mon-choix>
- Dave links to <http://dave.uktv.co.uk/>, also hosted at its parent company's web site UKTV
- DMAX links to <http://www.dmax.de/dmax360/>
- Fine Living Italy links to its website <http://www.fineliving.it/>
- DKiss links to <http://www.dkiss.es/>

### ■ Use of YouTube videos by pay TV players

Thematic channels YouTube presences consist mainly of short video clips promoting several TV programmes of the channels, trailers for upcoming programming and promotional videos. The only channel to make available additional digital bonus content was the men health centric channel DMax in Germany. Chérie 25 was the only channel to offer a full length catch-up of one of its TV programmes, reality talk show *C'est mon choix*.

**Table 14 Summary of YouTube uses - format of videos by thematic channels in EU-5**

	Promotional videos for TV programmes and 'best-ofs'	Trailers of TV programmes to come	Extracts of TV programmes	Catch-up full length videos (>20 min)	Catch-up short format videos (<20 min)	Original digital content
Chérie 25 (FR)	X	X	X	X**		
Dave (GB)	X	X	X			
DMAX TV (DE)	X	X	X			X*
Fine Living Italy (IT)	X	X	X			
DKiss (ES)	X	X	X			

Source: OBS desk research October 2016 \* bonus and additional content like VR and 360 videos \*\*only full-length catch-up of one TV programme, *C'est mon choix*, which has its own channel page

### ■ Types of YouTube channels used by pay TV players

**Tableau 1 Types of YouTube channels used by thematic channels EU-5**

	Channel / Corporate	Programme	Digital	Total
Chérie 25 (FR)	2	2	0	4
Dave (GB)	5	0	0	5
DMAX TV (DE)	2	3	0	5
Fine Living Italy (IT)	1	0	0	1
DKiss (ES)	1	0	0	1
<b>Total</b>	<b>11</b>	<b>5</b>	<b>0</b>	<b>16</b>
<i>In percentages</i>	69%	31%	0%	100%

Source: OBS desk research October 2016





Thematic channels had much fewer linked channels on their YouTube pages than the other broadcasters. When they are links, they link mainly to YouTube pages of channels of its parent company (NRJ for Chérie25 and UKTV for Dave) or to special segments of their programmes as DMax does it on their channel page. No thematic channel had a truly digital channel page.

- **Main statistics**

**Table 15 Main statistics on YouTube channels of thematic channels EU-5**

	YouTube channel pages	YouTube subscribers (cumulated)	YouTube videos (cumulated)
Chérie 25 (FR)	4	356 863	1 518
Dave (GB)	5	37 719	1 613
DMAX (DE)	5	114 106	1 377
Fine Living Italy (IT)	1	3 208	452
DKiss (ES)	1	235	7

Source: OBS desk research October 2016

Chérie 25 relatively large number of subscribers stems mainly from its success TV programme page of *C'est mon choix*. DMax federates its subscribers by proposing several TV programme YouTube pages with some additional bonus content. The YouTube presence of Fine Living Italy and DKiss is very limited and seems to be only there to establish a presence and to send viewers to their web sites for full length catch-up viewing. The UKTV channel Dave operates in an ecosystem of channel also operated by UKTV and therefore links to the pages of the other channels.



## 2.6 Summary of Main Multi-Channel Network (MCN) acquisitions

Multi-Channel Network's (MCN) main activities consist of aggregating, developing and then monetizing audiences across OTT video services (main use is YouTube) and social media networks (Facebook, Snapchat, Twitter, Vine). They are therefore responding to the entertainment desires of younger audiences and a prime interest for broadcasters to stay in touch and reach one of their target audiences.

Commercial broadcasters and pay TV players are the investing and acquiring MCNs since 2012 in order to respond to a changing viewing landscape and declining linear TV viewing, especially by younger audiences. MCNs bring the promise to these players of staying relevant for younger audiences. These audiences in turn are then monetized through true advertisements, be it traditional online video advertisements, or increasingly branded content, sponsored content or product placements. As brands and advertisers want to reach younger audiences, creators in the network of MCNs are able to attract the attention of these target groups, attention which in turn can be monetised. It is therefore no surprise that the acquisition spree of MCNs increased during the years 2013 to 2016, as traditional broadcasters wanted to hedge their commercial future. In Table 16, the main acquisitions and investments into MCNs are summarized.

Also, it should be noted that even as MCNs started mostly on YouTube by federating creators and their channels and audiences, with the quick changing landscape for online video viewing, MCNs have adapted to several platforms and are bringing their content to a variety of online video outlets. Their role is currently changing, shifting from marketing, managing and monetizing content and creators increasingly towards participating actively in the production of content and promoting their most successful creators. The price tag attached to several acquisitions, such as Maker Studios acquisition by The Walt Disney Company (USD 500 million + USD 450 million in bonus incentives) shows the importance to traditional players of these new entertainment and creation networks.

In Europe, several players have acquired and invested in MCNs:

- RTL Group acquired BroadbandTV (51% stake) in June 2013 for USD 36 million, which was in February 2016 the top ranked multi-platform network worldwide, according to comScore. RTL Group acquired also a 93.6% stake in StyleHaul for USD 107 million in November 2014. (RTL also operates since June 2006 the online video platform clipfish, popular in Germany (attracting 754 000 unique viewers in June 2016 in Germany, according to comScore).
- ProSiebenSat.1 acquired Collective Digital Studio for USD 83 million in July 2015 which it merged into Studio71 with its existing operations on video sharing platforms.
- Modern Times Group acquired a 51% stake into Zoomin.TV in July 2015 for an undisclosed amount and in the same month acquired Splay, one of the leading Nordic MCN, for an undisclosed amount.
- Canal Plus Group acquired a 60% in Studio Bagel in March 2014 for an undisclosed amount
- Sky invested into sports-centred MCN Whistle Sports in March 2016 with several other investors
- ITV acquired a minority stake in MCN Channel Mum in August 2015 to strengthen its position on video sharing platforms, in order to invest further than only in production companies
- All other acquisitions are summarized in the table below and estimates of the valuation at the point of investments are given in Table 17.

**Table 16 Investments in and acquisitions of MCNs 2012 - 2016**

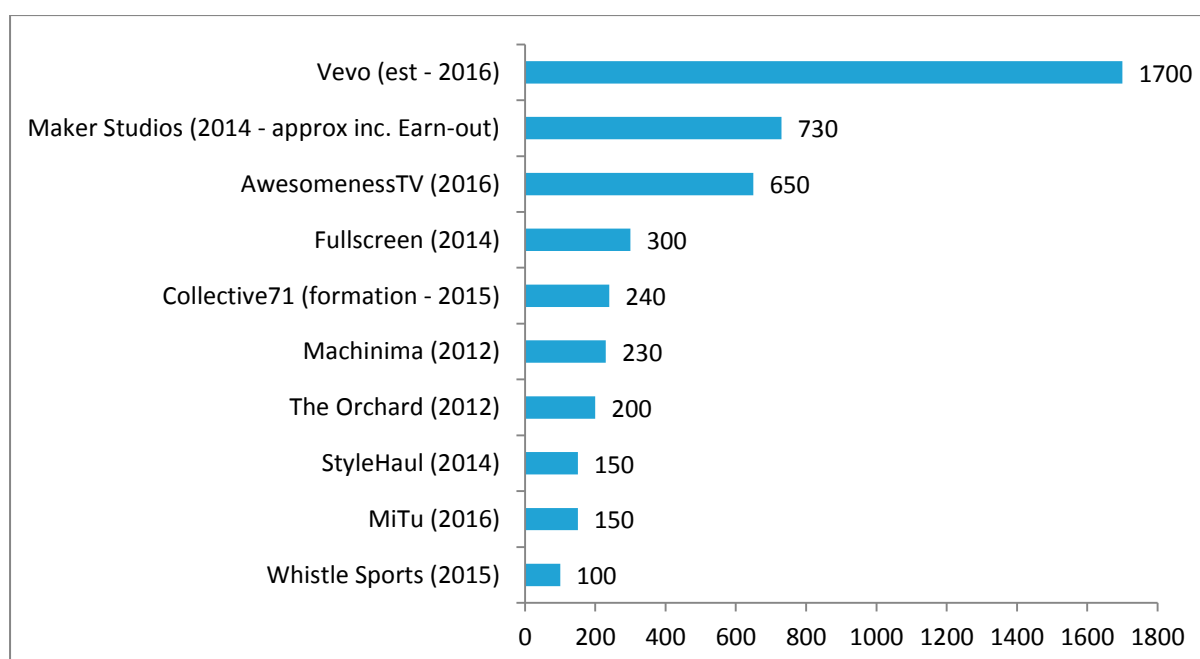
MCN and Digital studios	Buyer/Investor	Amount	Date	Number of channels (est.)
AwesomenessTV	DreamWorks Animation (investment by Hearst for 25% of USD 81.25 million in December 2014 & Verizon investment of USD 159 million for 24,5% in April 2016)	USD 33 million (+incentives)	May 2013	86 524
Big Frame	AwesomenessTV	USD 15 million	April 2014	n.a.
BroadbandTV	RTL Group (51% stake)	USD 36 million	June 2013	74 000
Channel Mum	ITV minority stake	not disclosed	August 2015	n.a.
Channelflip	Shine (News Corporation)	not disclosed	January 2012	n.a.
Collective Digital Studio (merged into Studio71)	ProSiebenSat.1 (75% stake)	USD 83 million (+USD 83 million for development)	July 2015	1 400
Defy	Viacom minority stake	not disclosed	July 2014	30 000
Divimove	FreemantleMedia (51% stake)	not disclosed	January 2015	1 300
Fullscreen	Otter Media	Estimates: USD 200 - 300 million	September 2014	70 000
Machinima	Warner Bros, Google, Redpoint Ventures, MK Capital	Multiple funding rounds of USD 35 million + 24 million + USD 18 million	February 2015	10 889
Maker Studios	The Walt Disney Company	USD 500 million (+USD 450 million performance-based)	March 2014	55 000
Revision3	The Discovery Channel	estimates: USD 30 - 40 million	May 2012	n.a.
Splay	Modern Times Group (81% stake)	not disclosed	July 2015	600



Studio Bagel	Groupe Canal+ (60% stake)	not disclosed	March 2014	n.a.
StyleHaul	RTL Group (93.6% stake)	USD 107 million	November 2014	5 974
Tastemade	Scripps Network Interactive, Comcast Ventures, Liberty Media, Tohokushinsha Film Corporation, Redpoint Ventures, Raine Ventures	Funding round of USD 40 million	December 2015	451
The Orchard	Sony Music Entertainment	not disclosed	March 2015	1 000
Vevo	Universal Media Group, Sony Music Entertainment, Google, Aby Dhabi Media			50 422
Whistle Sports	Sky, Liberty Global, NBC Sports Ventures, Tegna, Emil Capital Partners + other investors	USD 60 million raised	March 2016	355
Zoomin.TV	Modern Times Group (51% stake)	not disclosed (company valued at USD 95.4 million)	July 2015	30 000

Source: News reports, MIPTV, Vastmedia, Ampere Analysis, IHS, company websites,

**Table 17 MCN valuation estimates at point of investment, in USD million**



Source: AmpereAnalysis <https://www.ampereanalysis.com/blog/6af5d58a-a739-4a8c-8202-cc7a09f83759>





## 3.ANNEXES AND DATA



## 4. France

### 4.1 French broadcasters on YouTube – Summary tables

In France, the broadcasters selected for this report are:

- The public broadcaster France Télévisions which operates the free-to-air channels France 2, France 3 (and regional windows), France 4, France 5, France Ô and France TV Info.
- The commercial broadcaster TF1 belonging to group TF1 which operates in addition to TF1 the free-to-air channels TMC, NT1, HD1, LCI and the thematic channels TV Breizh, Histoire and Ushuaia TV distributed on cable, satellite and IPTV in France.
- The main pay TV channels Canal+ belonging to Groupe Canal+ SA owned by Vivendi. Canal+ Group broadcasts other free-to-air commercial channels such as C8, CNews and CStar and thematic pay channels (such as Ciné+ channels) on cable, satellite and IPTV networks. These channels are not part of the analysis as the focus is only on the main pay TV channels under the Canal+ brand umbrella (Canal+, Canal+ Décalé, Canal+ Sport, Canal+ Cinéma and Canal+ Séries).
- The thematic channel Chérie 25, part of the NRJ Group

**Table 18 Summary of YouTube channel use by French broadcasters, October 2016**

	Promotional videos for TV programmes, 'best-ofs'	Trailers of TV programmes to come	Short extracts of TV programmes	Catch-up full length videos (>20 min)	Catch-up short format videos (<20 min)	Original digital content
France Télévisions	X	X	X	X	X	X*
TF1	X	X	X			X*
Canal+	X	X	X	X	X	X
Chérie 25	X	X	X	X**		

Source: OBS desk research October 2016

\*For France Télévisions and TF1, original digital content seems to be limited and under the form of bonuses or add-ons to actual programmes. Canal+ has acquired Studio Bagel, a MCN focused on original digital content not broadcasted on Canal+'s linear channels and therefore truly digital exclusive content.

\*\*Only full-length catch-up of one TV programme, C'est mon choix, which has its own channel page



**Table 19 Number of YouTube channels by type for each broadcaster**

	Channel / Corporate	Programme	Digital	Total
France Télévisions	2	11	0	13
TF1	5	11	2	18
Canal+	3	13	4	20
Chérie 25	2	2		4
<b>Total</b>	<b>12</b>	<b>37</b>	<b>6</b>	<b>55</b>
<i>in percentages</i>	22%	67%	11%	1

**Table 20 Summary of use of Dailymotion by French broadcasters, October 2016**

	Promotional videos for TV programmes and 'best-ofs'	Trailers of TV programmes to come	Extracts of TV programmes	Catch-up full length videos (>20 min)	Catch-up short format videos (<20 min)	Original digital content
France Télévisions	X	X	X			
TF1						
Canal+	X	X	X	X	X	X
Chérie 25	X			X*		

Source: OBS desk research October 2016

\*Only full-length catch-up of one TV programme, *C'est mon choix*, which has its own channel page

**Table 21 Number of Dailymotion channels by type for each broadcaster**

	Channel / Corporate	Programme	Digital	Total
France Télévisions	6	0	0	6
TF1	0	0	0	0
Canal+	6	44	3	53
Chérie 25	1	0	0	1
<b>Total</b>	<b>13</b>	<b>44</b>	<b>3</b>	<b>60</b>
<i>in percentages</i>	22%	73%	5%	1



**Table 22 Summary table – Main stats on YouTube and Dailymotion channel pages for French Broadcasters**

	YouTube channel pages	YouTube subscribers	YouTube videos	Dailymotion channel pages	Dailymotion subscribers	Dailymotion videos
France Télévisions	13	412 104	11 552	6	2 525	7 172
TF1	18	467 728	3 946	-	-	-
Canal+ *	20	9 148 747	2 222	53	23 325	9 995
Chérie 25	4	356 863	1 518	1	56	95

Source: OBS desk research October 2016

The 3 selected broadcasters all have a presence on YouTube; regrouped under their main YouTube channel, see Table 24.

\*For Canal+ websites, Vivendi websites have been taken into account as it is not possible to make a distinction for unique viewers among the different Vivendi websites. Canal-plus.com is the websites for subscribers to Canal+ whereas Canalplus.fr is open to all, which can be seen in the differences of number of minutes per viewer and minutes per video for the 2 websites.

#### **4.1.1 Ranking of broadcasters official YouTube channels and broadcasters web sites**

In France, music channels and Multi-Channel Networks rank on the top place for YouTube channels, with Vevo, Warner Music and BroadbandTV trusting the 3 first places.

The highest ranked broadcaster YouTube channels are these of France Télévisions, at rank 11 overall of the most visited YouTube channels in France. The group's YouTube channels have drawn in June 4.19 million unique viewers and the France Télévisions YouTube properties are ranked 11th among YouTube channels in France. On average, viewers watched 5.9 videos per month for 22 minutes total. France Télévisions' YouTube channels reached 6.9% of the French population in June 2016.

Canal Plus' YouTube channels rank at place 15 in the most watched YouTube channels in France. The channels have drawn 3.3 million total unique viewers in June 2016, which watched on average 10.5 videos for 27.3 minutes per month. Canal Plus' YouTube channel reached 5.5% of the French population in June 2016.

TF1's YouTube channels however are much lower ranked, at place 105 with 473 000 unique viewers which watched 5.1 videos on average for a length of 11.3 minutes. TF1's YouTube channels reached 0.8% of French population.

When compared with the number of unique viewers of their websites, major differences appear between broadcasters. France Télévisions' YouTube channels had more unique viewers than their website, which is the same case for Canal+. However, as catch-up programmes are also accessed through mobile devices, which are not measured by comScore's videometrix, this might not reflect the true picture, as video is increasingly consumed on mobile devices, specifically YouTube videos in short format. The most interesting difference appears for TF1, which seems not to rely on YouTube channels to attract audiences but relies on its websites. The difference in the number of unique viewers is telling; 473 000 on its YouTube channel (ranked 105th in France) whereas its websites attracted more than 4.6 million unique viewers in June 2016. TF1 monetizes its content rather on its own websites than on YouTube channels.

Unique viewers is not the only metric to observe; the number of minutes spent watching videos per viewer and the number of videos per viewer is also indicative of the use made by visitors. For France Télévisions and TF1, visitors spent more time watching videos on YouTube than on their own websites; however visitors watched more videos for both on their websites. For Canal+, the number



of minutes spent watching videos on Canal-plus.com (293.2 minutes per viewer) shows the use of the website for catch-up function. It seems that catch-up services measured by comScore are only done for canal-plus.com as the number of minutes spent by visitors of TF1's and France Télévisions' websites is not indicative of true catch-up viewing.

**Table 23 Number of unique viewers, minutes per viewer and videos per viewer for broadcasters YouTube channels and websites June 2016, in units**

	Unique Viewers YouTube channel	Unique Viewers broadcasters websites	Minutes per viewer YouTube channel	Minutes per viewer broadcasters websites	Videos per viewer YouTube channels	Videos per viewer broadcasters websites
France Télévisions	4 189 000	3 459 000	22,2	3,2	5,9	9,4
TF1	473 000	4 698 000	11,3	4,9	5,1	14,5
Canal+*	3 340 000	3 063 000	27,3	157,8	10,5	14,7
Chérie 25	-	-	-	-	-	-

Source: comScore Video Metrix – June 2016

\*For Canal+ websites, Vivendi websites have been taken into account as it is not possible to make a distinction for unique viewers among the different Vivendi websites. Canal-plus.com is the websites for subscribers to Canal+ whereas Canalplus.fr is open to all, which can be seen in the differences of number of minutes per viewer and minutes per video for the 2 websites.



**Table 24 Total unique viewers of YouTube channels in France – content and ads, June 2016**

NOT AVAILABLE IN THE PUBLIC VERSION OF THE REPORT DUE TO COPYRIGHT REASONS

**Table 25 Total unique viewers all video proprieties in France – content and ads, June 2016**

NOT AVAILABLE IN THE PUBLIC VERSION OF THE REPORT DUE TO COPYRIGHT REASONS

*Source: comScore Video Metrix – June 2016*



## 4.2 France Télévisions – public broadcaster

France Télévisions operates its own catch-up services for most of the programmes broadcasted on its linear channel, named [Francetvpluzz](#). In addition, the broadcasters' channels have a presence on YouTube and Dailymotion. Most of the catch-up viewing is made on its catch-up service Francetvpluzz, so how does France Télévisions use YouTube and Dailymotion?

### 4.2.1 France Télévisions channel presence on YouTube

Table 26 France Télévisions YouTube channels and main YouTube page, October 2016

Name of channel	Type	Videos	Subscribers	Format of videos
Archipels	Programme	26	405	Long format catch-up
Le Goût du risque	Programme	15	252	Extracts
Retour aux sources	Programme	1	208	Long format catch-up
Zouzous	Programme	56	18 259	Trailers, Extracts, Promotional videos
Investigations	Programme	25	3 793	Long format catch-up
C à vous	Programme	3 568	45 862	Short format catch-up
On n'est pas couché	Programme	2 924	183 881	Extracts, Long format catch-up
Infrarouge	Programme	77	21 204	Extracts, Long format catch-up
Rendez-vous en terre inconnue	Programme	12	3 041	Promotional videos, Extract
Les carnets de julie	Programme	523	11 998	Short format catch-up, Extracts
Ludo	Programme	131	14 410	Short format catch-up
France 4	Channel	1 115	10 346	Extracts, Trailers, Promotional videos
France Télévisions (Main page)	Channels/Corporate	3 079	98 445	Extracts, Trailers, Promotional videos

Source: OBS desk research October 2016

France Télévisions' main YouTube page, [France Télévisions](#), has 98 445 subscribers as of October 2016 (the page was created in May 2010) and 3 043 videos. The majority of these clips are short format videos of programmes broadcasted on France Télévisions' main channels and promotional video clips for France Télévisions. The videos are short extracts of programmes, rather short in length (10 seconds to several minutes), of which the main use seems to be of promotional purposes or videos created in order to be shared on social networks. On the main France Télévisions page, full-length videos of actual broadcasted shows are not listed; therefore the channel seems to be rather for promotional purposes than for actual catch-up functions.

France Télévisions furthermore directly links to 12 channels on its YouTube page. These channels are rather programme orientated than links to France Télévisions' free-to-air channels, with only a direct link to the channel page of [France 4](#) (subs : 10 346). France 4 page proposes short format video clips of its broadcasted programmes and trailers and announcements on future programmes and further links to 23 other France Télévisions channels of programmes broadcasted on its free-to-air channel. Notoriously absent of France Télévisions' YouTube page are direct links to the other channels of the group; France 2, France 3, France 5 and France TV Info.

The other 11 channels directly linked are programmes of France Télévisions' channels:

- [Archipels](#) a programme of France Ô, with 26 full-length videos (with 55 minutes length on average) of the original broadcasted documentaries (catch-up function)



- Le Goût du Risque mini-videos of extreme sports, rather there for promotional purposes and managed with external partners such as Samsung and Seppia (short-format videos).
- Retour aux sources full-length programme of the original broadcast (catch-up function) on France 2.
- Zouzous promotional video clips for the Zouzous TV programme broadcasted on France 5 and France 4 at aimed at 3 to 6 years olds. (short format promotional videos and trailers)
- Ludo full-length video clips of children animation shows broadcasted on France 3 and France 4 such as *Les Lapins Crétins* and *Famille Pirate* (short video catch-up function).
- Investigation catch-up function for the *Investigations* series broadcasted on France Ô (full length catch-up function).
- C à vous video clips of the programme *C à vous* broadcasted on France 5 (catch-up function).
- On n'est pas couché full-length video and video clips of the *On n'est pas couché* TV programme broadcasted on France 2 (catch-up function)
- Infrarouge full-length videos of the programme broadcasted on France 2 (catch-up function)
- Rendez-vous en terre inconnue video clips of the actual broadcasted programme on France 2 (short format promotional videos)
- Les carnets de Julie short-video clips of cooking recipes and full-length video clips of the programme broadcasted on France 3 (catch-up function and short video clips)

These channels of programmes link to other channels of programmes broadcasted on France Télévisions channel in their Channel section. The links to other France Télévisions programmes channels are not part of France Télévisions main YouTube channel page. As the list is exponential, a precise listing of all channels which are linked from the 14 channel pages of France Télévisions official YouTube channel page is not possible in this overview.

However, from a short sampling of these channels it appears that there are also used for the purposes described above:

- Full length catch-up over 20 minutes of several broadcasted TV programmes on linear channels belonging to the France Télévisions group
- Short videos catch-up under 20 minutes
- Promotional video clips of programmes in the format of trailers and best-ofs
- Short videos extracted from TV programmes for promotional or social sharing purposes

As no direct link to the others linear channels of the France Télévisions group are found on its main YouTube page channel, the user has to search for these channels. The main other YouTube channel of France Télévisions group appears to not be the one of an actual linear channel but a YouTube channel dedicated to France Télévisions' sport offering, Francetv Sport with 72 113 subscribers and 4 871 videos. The highest share of videos formats are short clips for promotional purposes, extracted from sport-specific programmes, and extract of interviews or mini-documentaries relating to sport and broadcasted on one of the groups' channel. The channel main page promotes also the sports event broadcasted on France Télévisions' channels such as the Olympics, the Para-Olympics, the Tour de France and Roland Garros through short format video clips.

No official channel page of the channel France 2 could be found as of October 2016. It seems that many unofficial channels use TV programmes broadcasted on France 2 but these channels are not



operated by France Télévisions but rather by third-parties (mainly individuals). However, channels of programmes of France 2 are found on YouTube such as the TV programme *Faites entrer l'accusé* (subs: 35 715, 123 videos) which proposes full length catch-up of the actual broadcasted TV programme. It seems that programmes broadcasted on France 2 have their own YouTube channels

France 3 has a main YouTube channel and page for its national offer, *France 3 Toutes Régions* (subs : 1 888, 1 827 videos). The channel proposes mainly short extracts of news programming and full-length catch-up videos of its informational programme *Edition des initiatives*. However, each regional France 3 channel has also its YouTube channel, offering regional news programming, extracts of its news programming and short format videos. The content offered on seems to be rather centred on news and mainly in the format of short videos for each of these regional France 3 channel pages, such as the page of *France 3 Paris Ile-de-France* (subs : 4 899, 5 435 videos).

France 5 also has no official YouTube channel page but official YouTube channels of its programmes such as *C dans l'air* (subs : 11 279), *La Quotidienne* (subs : 28 342) or *C à vous* (subs : 45 315) which are mainly proposing full-length videos of their broadcasted shows, acting thus as a catch-up service for each of these TV programmes.

France Ô does not seem to have an official YouTube channel page but did have official YouTube channels for programmes broadcasted on its linear channel such as *La Reina del surf* (*inactive since 3 years*). It seems that for specific programmes, France Ô is using YouTube as a catch-up platform such as for *Archipels*.

France TV Info seems not yet to have an official YouTube channel. However, channels claiming to be France Info exist: *Francetv info* and *FranceInfo*, lacking however the certified status as of October 2016. As the channel was newly launched in 2016 and several videos on these pages are older than 2 years, it is not quite clear if these channels are operated by France Télévisions and have been renamed or if these are channels operated by third-parties which use France Info content.

#### 4.2.2 France Télévisions channel presence on Dailymotion

Table 27 France Télévision Dailymotion channels and main channel page

Name of channel	Type	Videos	Subscribers	Format of videos
France Télévisions	Channel	13	38	Extracts (not active)
France 2	Channel	1881	1425	Promotional videos, Extracts
France 3	Channel	683	243	Short format catch-up, Extracts, Promotional
France 4	Channel	230	86	Promotional videos, Extracts, Trailers
France 5	Channel	1896	280	Promotional videos, Extracts
France Ô	Channel	2469	453	Promotional videos, Extracts, Trailers

Source: OBS desk research October 2016

France Télévisions seems to have also a presence on Dailymotion, however very limited with a low subscriber number for the main channel pages and without certainty that these pages are officially operated by France Télévisions. The highest number of subscribers for a *France Télévisions channel page* is 38 and with only 13 videos available, the “newest” video being posted 5 years age. It seems that these pages are not officially operated by France Télévision group and are rather used by third-parties.

It rather seems that on YouTube, France Télévisions is present through its broadcasting channels, which all have certified and operational channel pages (except the newly launched France TV Info).



France 2 has an officially certified channel, with 1 425 subscribers and 1 881 videos, most them extracts of actual programmes which could serve promotional or video sharing purposes.

France 3 has also its official Dailymotion channel, with 243 subscribers and 683 videos, as for France 2 mainly short extracts of programmes and no really full-length videos for catch-up purposes. Furthermore, the regional windows of France 3 channels have also each its own Dailymotion channel, with more subscribers and videos, and proposing longer video clips and catch-up programmes of its regional news and documentaries.

France 4 also has its Dailymotion page, with 86 subscribers and 230 videos with short extracts of its actual broadcast programmes, much less than on YouTube.

The same applies for France 5, an official Dailymotion channel exists with 280 subscribers and 1 896 videos, with short extracts of actual programmes and trailers of upcoming programming. The channel seems to exist mainly for promotional purposes for the linear programming.

France Ô has also a Dailymotion channel with 453 subscribers and 2 469 videos, mostly trailers for promotional purposes and short extracts of programmes.

On a sample test of Dailymotion channels for specific programmes, France Télévisions' TV programmes also have YouTube channels, such as for *On n'est pas couché*. However, it seems that Dailymotion has more extracts of these TV programme than the full-length programme as it was the case on YouTube. *Faites entrer l'accusé* also has a Dailymotion channel (however lacking the certified status) with mainly short extracts of the programme than the full length of the broadcasted programme.

Compared to the number of videos and subscribers of France Télévisions' YouTube and Dailymotion channels, it seems that YouTube is used more by France Télévisions than Dailymotion.



### 4.3 TF1 – commercial free-to-air broadcaster

TF1 has an official catch-up service for programmes broadcasted on TF1, HD1, TMC and NT1, called MyTF1 and additional content, only made available on the internet under the MyTF1 XTRA brand. As for France Télévisions, the main catch-up viewing is done on its own catch-up service. As an overview of TF1's YouTube channel has shown, the main use by TF1 of YouTube is to promote its programmes and to make short extracts and best-ofs of its shows available. However, no real catch-up for programmes is made available on its official YouTube channels.

#### 4.3.1 TF1's channel presence on YouTube

Table 28 TF1 YouTube channels and main YouTube page, October 2016

Name of channel	Type	Videos	Subscribers	Format of videos
TMC	Channel	16	2 088	Promotional videos, Extracts
NT1	Channel	44	8 598	Promotional videos, Extracts
HD1	Channel	7	619	Promotional videos, Extracts
Secret Story	Programme	797	56 028	Promotional videos, Extracts
The Voice Kids France	Programme	251	75 319	Promotional videos, Extracts
Quotidien	Programme	43	13 304	Extracts, best-ofs
C'est Canteloup	Programme	88	329	Extracts, best-ofs
The Voice: la plus belle voix	Programme	1 082	118 848	Extracts, best-ofs
LCI	Channel	670	27 406	
Danse avec les stars	Programme	312	56 369	Extracts, best-ofs
50 min inside	Programme	4	4 504	Extracts
Téléfoot	Programme	226	12 117	Extracts, best-ofs, digital content?
Automoto	Programme	82	5 470	Extracts, 1 original digital content
LeChrisMarques	Digital	41	47 253	Original digital content
La Villa des Cœurs Brisés	Programme	10	2 476	Extracts
Petits Plats en Equilibre	Programme	99	1 786	Original digital content
TFOU Max	Digital	6	12 394	Promotional videos
TF1 (Main page)	Channel/ Corporate	168	22 820	Promotional videos, Extracts, Best-ofs

Source: OBS desk research October 2016

TF1's main YouTube channel page has 22 820 subscribers as of October 2016 (the page was created in October 2005) and 168 videos. Videos on the main channel page are all under 5 minutes with the majority of videos being shorter than 2 minutes. Also, the oldest video on the page was posted 1 year ago, indicating maybe a cleaning by TF1 or a sparse use of its YouTube channel page. The videos are short extracts of several TF1 TV programmes and trailers for upcoming programmes. The main channel page therefore has not a real catch-up function but is rather seen as a promotional tool by TF1.

TF1's main YouTube channel page links to 17 other channels.

4 of this links to YouTube channels are for other linear TV channels owned by the TF1 group:





- TMC with 16 videos, short in length and mainly extracts of TV programmes or promotional videos for actual TV programmes. (promotional function)
- NT1 with 44 videos, short in length and mainly extracts of its TV programmes such as *Le bachelor*, *Secret Story* and *Super Nanny*. The videos are all under 3 minutes, and are mainly for promotional purposes of NT1's programming (promotional function).
- LCI with 664 videos, all short format extracts of its news programming. The videos seem to be made for video sharing purposes on social media and short extracts of best-ofs of actual broadcasted TV programmes. (promotional and social media video sharing function)
- HD1 with 7 videos, promotional extracts and trailers

13 of this links to other YouTube channels are for programmes broadcasted by TF1's channels:

- Secret Story Officiel and 797 videos, mainly short extracts of the programmes acting as kind of best-ofs, summaries and for social video sharing purposes.
- The Voice Kids France and 251 videos, mainly excerpts of the TV programme under the form of musical performances and auditions for the TV shows (extracts, trailers, promotional purposes)
- Quotidien and 43 videos which are extracts of the TV programme, no full length video clip of the actual show (extracts, best-ofs)
- C'est Canteloup and 88 videos under the form of short extracts from the TV programme (extracts, best-ofs)
- The Voice: la plus belle voix and 1 082 videos under the form of video clips of songs performed on the TV shows (extracts)
- Danse avec les stars and 312 videos mainly short extracts of the TV programme and best-ofs of past seasons (extracts, best-ofs)
- 50 min inside and 4 videos, short extracts of the TV programme.
- Téléfoot and 226 videos with short extracts of the TV programme and digital content branded under MyTF1 and not broadcasted on the linear channel (extracts, best-ofs, original digital content)
- Automoto and 82 videos, extracts of the TV programme and one 360 video, not broadcasted on the linear channel (extracts, 1 original digital content)
- LeChrisMarques and 41 videos, original digital content and official channel of one of the jurors of the TV programme *Danse avec les stars*. (Original digital content), however not TF1 branded.
- La villa des Coeurs Brisés and 10 videos, extracts, trailers and promotional content for the broadcast TV programme. (extracts, promotional, trailers)
- Petits plats en Equilibre and 99 videos, branded MyTF1 and therefore rather original digital content made for the MyTF1 service. (original digital content)
- TFOU MAX (subs: 12 281) and 6 videos, promotional content for the TFOU Max video-on demand services aimed at children (promotion)

From this overview of the main channel pages under the TF1 brand, it seems that TF1 mainly uses YouTube for promotional purposes; trailers, best-ofs and short extracts. Another use, for 2 official



YouTube channels, is to offer original digital content, mainly short format, which was not broadcasted on the linear channel. TF1 does not propose catch-up videos of its TV shows on YouTube (at least on the main YouTube channel pages) which the company prefers to monetize on its own MyTF1 video service, where catch-up programmes are available.

#### **4.3.2 TF1's channel presence on Dailymotion**

We could not find an official Dailymotion channel of TF1. There are 2 channels branded under the TF1 logo, MyTF1 and TF1\_hd but these 2 channels do not seem to be official channels of TF1 but rather operated by third-parties, with respectively 21 subscribers and 31 videos and 78 subscribers and 7 videos. It seems that TF1 is not active under its official brand name on Dailymotion and does not actively manage a main channel page. Combined to the fact that there is no real catch-up video on YouTube for TF1's channels, it seems that the broadcaster is more focused on its MyTF1 audiovisual on-demand service than to really monetize its content on video sharing platforms.



## 4.4 Canal+ - pay TV

Canal+'s group operates also its own websites and catch-up service, either on [canal-plus.com](http://canal-plus.com), either on [MyCanal](http://MyCanal.com). Vivendi, Canal+ group's owner, acquired Dailymotion in 2015. As the comScore data shows, catch-up viewing is taking place on the website canal-plus.com. Also, Canal+ acquired 60% of YouTube's MCN [Studio Bagel](http://StudioBagel.com) in 2014, one of the larger French MCNs. Studio Bagel has furthermore launched two new YouTube channels in 2014, [Studio Movie](http://StudioMovie.com) and [Studio Gaming](http://StudioGaming.com) in order to launch and discover new talents, to launch new projects mostly cinema and video gaming themed and to develop brand content for advertisers.

### 4.4.1 Canal+'s channel presence on YouTube

Table 29 Canal+'s YouTube channels and main YouTube page, October 2016

Name of channel	Type	Videos	Subscribers	Format of videos
Séries Canal+	Channel	182	26 404	Promotional video, Short format catch-up, trailers, Extracts
Cinéma Canal+	Channel	371	30 023	
Bloqués	Programme	123	747 436	Short format catch-up, Original digital content
Importantissime	Programme	34	2 058	Short format catch-up
Canal+ Music	Programme	168	77 629	Short format catch-up, Extracts
Le Grand Journal	Programme	181	46 081	Extracts, Best-ofs
L'Effet Papillon	Programme	94	36 266	Short format catch-up, Extracts
Bref	Programme	106	229 752	Short format catch-up, Best-ofs
Le Meufisme	Programme	45	212 154	Original digital content
Clique	Programme	155	255 002	Short format catch-up, Extracts
Le Dézapping	Programme	71	804 061	Extracts, Best-ofs
Connasse	Programme	45	549 127	Short format catch-up, Best-ofs
Action Discrète	Programme	39	45 841	Short format catch-up, Extracts
Les tutos	Programme	50	2 177 370	Short format catch-up, Extracts, Original digital content
Made in Groland	Programme	64	34 889	Extracts, Best-ofs
Studio Bagel	Digital	192	2 704 818	Original digital content
Studio Gaming	Digital	57	478 388	Original digital content
Studio Movie	Digital	53	501 860	Original digital content
La Biscotte	Digital	23	95 688	Original digital content
Canal+ (Main page)	Channel/Corporate	169	93 900	Extracts, Best-ofs, Promotional video, Trailers

Source: OBS desk research October 2016



Canal+ main [YouTube channel page](#) has 93 900 subscribers and 169 videos, created in November 2011. Large shares of these videos are in the 1 minute to 5 minutes range, with all videos being under 10 minutes. These videos are mostly extracts of TV programmes, trailers for upcoming programmes or best-ofs of Canal+'s programming. The main channel page [furthermore links to 19 other channel pages](#).

Two of these links are for YouTube channel pages of linear Canal+ channels, Canal+ Séries and Canal+ Cinéma:

- [Séries Canal+](#) (subs: 26 404) and 182 videos all under 5 minutes and mostly trailers for upcoming shows with some additional digital content not broadcasted on the linear channel, extension of its original series. (Promotional content, trailers, minor original digital content).
- [Cinéma Canal+](#) (subs: 30 023) and 371 videos, mostly interviews broadcasted on Canal+ Cinema, best-ofs of its TV programmes focused on cinema, trailers and extracts of its Cannes and César special editions. Most of the videos are under 10 minutes, except the interviews of directors and actors. (Extracts, catch-up under 20 minutes, trailers and promotion).

13 other linked channel pages are for programmes broadcasted on Canal+ and the remaining 4 are for its MCN Studio Bagel, Studio Movie, Studio Gaming and La Biscotte which is a YouTube channel centred on sports and especially football.

- [Bloqués](#) (subs: 747 436) and 123 videos, which is a catch-up for a mini-series integrated into Canal+'s *Grand Journal*. Most of the videos are in the 2 minutes range with some additional digital content of the show (making of, special guests) being made available. (catch-up under 20 minutes, original digital content)
- [Importantissime](#) (subs: 2 058) and 34 videos, catch-up for the mini-series broadcasted on Canal+. (catch-up under 20 minutes)
- [Canal+ Music](#) (subs: 77 629) and 168 videos, mostly extracts of concerts and songs broadcasted on Canal+'s channels and teasers/trailers for singers to come (catch-up under 20 minutes, extracts)
- [Le Grand Journal](#) (subs: 46 081) and 181 videos, extracts of the show broadcasted on Canal+ free-to-air with a duration under 5 minutes and best-ofs with a longer duration (extracts, best-ofs)
- [L'Effet Papillon](#) (subs: 36 266) and 94 videos, extracts of the TV programme broadcasted and catch-up under 10 minutes of documentaries included in the broadcasted TV programme (extracts, catch-up under 20 minutes)
- [Bref](#) (subs: 229 752) and 106 videos, catch-up under 3 minutes of the mini-programme broadcasted and original digital content under the form of bonuses and special content (catch-up under 20 minutes, original digital content)
- [Le Meufisme](#) (subs: 212 154) and 45 videos, original digital content – a web series created for YouTube (original digital content)
- [Cliques](#) (subs: 255 002) and 155 videos, catch-up of the broadcasted TV programme over 20 minutes, extracts (catch-up over 20 minutes, extracts)
- [Le Dézapping du Before](#) (subs: 804 061) and 71 videos, best-of of the shows and extracts (extracts, best-ofs)



- Connasse (subs: 549 127) and 45 videos, extracts, trailers and catch-up under 20 minutes of the mini-programme broadcasted (catch-up under 20 minutes, extracts and best-ofs)
- Action Discrète (subs: 45 841) and 39 videos, catch-up under 20 minutes of the mini-programme broadcasted (catch-up under 20 minutes, extracts)
- Les Tutos (subs: 2 177 370) and 50 videos, catch-up under 20 minutes of the mini-programme broadcasted, with some bonus content and making-ofs only available on digital platforms (catch-up under 20 minutes, extracts, original digital content)
- Made in Groland (subs: 34 889) and 64 videos, short extracts of the TV programme (extracts)
- Studio Bagel (subs: 2 704 818) and 192 videos, original digital content
- Studio Gaming (subs: 478 388) and 57 videos, original digital content, each week a new video
- Studio Movie (subs: 501 860) and 53 videos, original digital content, each week a new video
- La Biscotte (subs: 95 688) and 23 videos, original digital content, each week a new video

#### 4.4.2 Canal+'s channel presence on Dailymotion

Canal+'s parent company, Vivendi, is the owner of Dailymotion, having acquired 80% of the shares for EUR 217 million in 2015. Vivendi sees synergies in the video sharing platform and its other media companies. Therefore, how does Canal+ use Dailymotion?

Canal has a principal Dailymotion channel page, counting 4 085 subscribers and 1 002 videos as of October 2016. Videos on channel page range from short extracts, trailers, best-ofs of TV programmes to full-length catch-up videos under and over 20 min (and even live retransmissions of the César ceremony) and original digital content, . Canal+ is also using Dailymotion to make TV programmes available which are not broadcasted free-to-air such as *Les Guignols* for example.

The main channel page of Canal+ links to several other Dailymotion channel pages of programmes and channels of the Canal+ group, in majority these channels are of programmes broadcasted on Canal+ channels. Canal+ seems proactive in the creation of these channels, there are more of them than on YouTube and even programmes which have not yet started (such as the Hanounight Show, at the time of this report not yet broadcasted, has already its channel page).

The list of Dailymotion channels pages directly linked on the main Canal+ Dailymotion channel page are the following, see Table 30. In total, Canal+ refers to 52 other channel pages (excluding the main Canal+ channel page), of which 5 are links to other linear channels of Canal+ group, 3 are original digital channels (Studio Bagel) and 44 are links to programmes of Canal+'s channels. In total, these channels have 8 993 videos and 19 240 subscribers, an average of 173 videos and 370 subscribers per channel page.



Table 30 Dailymotion – Canal+ channels linked on main channel page

Name of channel	Type	Videos	Subscribers	Format of videos
Canal+ Sport	Channel	2 353	708	Extracts
Piwi+	Channel	39	51	Short format catch-up, Extracts
Planète+	Channel	190	96	Promotion, Trailers, Extracts
Comédie+	Channel	1 173	1 516	Extracts, best-ofs
Télétoon+	Channel	74	92	Original digital content, Extracts, Trailers
Studio Gaming	Digital Channel	59	7	Original digital content
Studio Movie	Digital Channel	53	8	Original digital content
Studio Bagel	Digital Channel	195	529	Original digital content
Hanounight Show	Programme	1	0	Trailer
Serge Le Mytho	Programme	2	26	Trailer, Short format catch-up
Le Département	Programme	3	0	Short format catch-up
What the Fuck France	Programme	6	10	Short format catch-up
Midi Sport	Programme	78	5	Extracts
19h30 Sport	Programme	67	5	Extracts
L'Album de la Semaine	Programme	30	1	Extracts, Long-format catch-up
Le Petit Journal	Programme	115	66	Extracts, Short format catch-up
Catherine et Liliane	Programme	30	81	Short format catch-up
Le Gros Journal de Mouloud Achour	Programme	73	143	Extracts, Short-format catch-up
Speakerine	Programme	148	2	Short format catch-up
Le Dezapping	Programme	68	0	Extracts, best-ofs
Time's up! Le show sur Télétoon+	Programme	24	26	Teaser, extracts
La Biscotte	Programme	22	8	Original digital content
Bapt&Gael	Programme	7	95	Original digital content
Cinema Canal+	Programme	275	690	Extracts, Short format catch-up
Canalsat Kids	Programme	3	80	Teasers, Extracts
Le Comité des Reprises	Programme	52	104	Short format catch-up, Extracts
Le Journal des Jeux Vidéo	Programme	77	53	Long format catch-up, Extracts
Filles d'aujourd'hui	Programme	24	58	Short-format catch-up, Extracts
L'Effet Papillon	Programme	93	50	Long and Short format catch-up, Extracts



Le Tube d'Isabelle Ithurburu	Programme	170	226	Long format catch-up, Extracts
Spécial Investigation	Programme	18	27	Extracts
Le Supplément d'Ali Baddou	Programme	133	39	Long format catch-up, Extracts
Le Grand Journal	Programme	1 073	236	Long format catch-up, Extracts
L'Œil de Links	Programme	86	64	Long format catch-up, Extracts
Court et Créations Canal+	Programme	87	28	Long and Short format catch-up, Extracts, Teaser, Promotion and best-ofs
Los Guinols	Programme	53	175	Extracts
The Guignols	Programme	49	2 174	Extracts
Détours	Programme	47	27	Original digital content, extracts
L'Emission d'Antoine	Programme	324	97	Long and Short format catch-up, Extracts
Groland Le Zapoï	Programme	206	425	Short format catch-up, Extracts
Pépites	Programme	46	99	Extracts
Les Tutos	Programme	44	15	Short format catch-up
Carte Blanche	Programme	163	73	Extracts
Eric et Quentin	Programme	51	53	Short format catch-up, Extracts
Jack	Programme	48	1 021	Extracts
Le Zapping	Programme	256	643	Short format catch-up
Importantissime	Programme	35	33	Short format catch-up
Bloqués	Programme	121	834	Short format catch-up
Clique	Programme	131	550	Long and Short format catch-up, Extracts
Les Guignols	Programme	503	7 372	Short format catch-up
Paris, un jour de...	Programme	15	482	Short format catch-up
Le Meufisme	Programme	0	37	Short format catch-up
Canal+ (Main page)	Channel	1 002	4 085	Extracts, best-ofs, Short and long format catch-up, Original digital content

Source: OBS desk research October 2016



## 4.5 Chérie 25 – Thematic channel

Chérie 25 is a French thematic channel, broadcasted on DTT, owned by the NRJ Group which operates the channels NRJ 12, NRJ Hits, NRJ Paris in addition to radio stations NRJ, Chérie FM, Nostalgie and Rire & Chansons.

### 4.5.1 Chérie 25 channel presence on YouTube

Table 31 YouTube – Chérie 25 channels linked on main channel page

Name of channel	Type	Videos	Subscribers	Format of videos
Chérie 25 (Main page)	Channel	0	500	No videos on main channel page
C'est mon choix	Programme	268	294 343	Long format catch-up
NRJ Play	Programme	5	1 035	Promotional videos, Trailers, Extracts
NRJ12	Channel	1 245	60 985	Extracts, Best-ofs, Promotional videos

Source: OBS desk research October 2016

### 4.5.2 Chérie 25 channel presence on Dailymotion

No main Chérie 25 Dailymotion channel page (one exists but inactive since 3 years, seems not official and only 5 videos posted with 5 subscribers). The main programme, *C'est mon choix* has a channel page, yet with much less subscribers and videos than the channel page on YouTube.

Table 32 Dailymotion – Chérie 25 channels linked on main channel page

Name of channel	Type	Videos	Subscribers	Format of videos
C'est mon choix	Programme	95	56	Long format catch-up, Best-ofs

Source: OBS desk research October 2016





## 5. The United Kingdom

### 5.1 UK broadcasters on YouTube - Summary

In the United Kingdom the broadcasters selected for this report are:

- BBC, the public broadcaster, with its channels broadcasted on DTT in the United Kingdom BBC 1, BBC 2, BBC4, CBBC, Cbeebies (BBC 3 is online only since 2016).
- ITV, the main commercial free-to-air broadcaster, with its channels ITV1, ITV2, ITV3, ITV4 and ITVbe
- Sky, the main pay TV company in the United Kingdom
- UKTV's Dave, a thematic channel operated by UKTV (co-owned by Scripps and BBC Worldwide)

As for France, only channels directly linked on the main channel page are taken into account. Individual programmes may have their own channel page, not linked to the official broadcaster channel's page and therefore not be taken into account.

**Table 33 Summary of YouTube channel use by British broadcasters, October 2016**

	Promotional videos for TV programmes and 'best-ofs'	Trailers of TV programmes to come	Extracts of TV programmes	Catch-up full length videos (>20 min)	Catch-up short format videos (<20 min)	Exclusive digital content
BBC	X	X	X		X	X
ITV	X	X	X		X	X
SKY	X	X	X			
Dave	X	X	X			

Source: OBS desk research October 2016

**Table 34 Number of YouTube channels by type for each broadcaster**

	Channel / Corporate	Programme	Digital	Total
BBC	15	5	1	21
ITV	3	3	0	6
SKY	9	3	1	13
Dave	5	0	0	5
<b>Total</b>	<b>32</b>	<b>11</b>	<b>2</b>	<b>45</b>
<i>in percentages</i>	71%	24%	4%	100%

Source: OBS desk research October 2016

No real Dailymotion channel use for selected broadcasters therefore no summary table for use of Dailymotion.



**Table 35 Summary table - Main stats for UK broadcasters YouTube channel pages**

	YouTube channel pages	YouTube subscribers (cumulated)	YouTube videos (cumulated)
BBC	21	15 295 965	47 869
ITV	6	12 013 022	10 656
SKY	13	1 109 569	12 935
Dave	5	37 719	1 613

Source: OBS desk research October 2016

### 5.1.1 Ranking of broadcasters official YouTube channels and broadcasters web sites

**Table 36 Number of unique viewers, minutes per viewer and videos per viewer for broadcasters YouTube channels and websites June 2016, in units**

	Unique Viewers YouTube channel	Unique Viewers broadcasters websites	Minutes per viewer YouTube channel	Minutes per viewer broadcasters websites	Videos per viewer YouTube channels	Videos per viewer broadcasters websites
BBC	1 968 000	3 889 000	12,2	6,7	4,1	4,6
ITV	1 724 000	2 650 000	24,8	20,3	8,1	57,1
Sky	143 000	3 389 000	6,3	73,4	2,2	16,2
UKTV	-	-	-	-	-	-

Source: comScore Video Metrix – June 2016



**Table 37 Total unique viewer of YouTube channels in the United Kingdom – content and ads, June 2016**

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**Table 38 Total unique viewers all video properties in the United Kingdom, June 2016**

NOT AVAILABLE IN THE PUBLIC VERSION OF THE REPORT DUE TO COPYRIGHT REASONS

*Source: comScore Video Metrix – June 2016*



## 5.2 BBC – public broadcaster

### 5.2.1 BBC's channel presence on YouTube

20 channel pages linked from official BBC channel page. Other BBC channel pages not linked to main channel page, YouTube statistics give a total of 46 BBC branded channels, 26 of which we were not able to find through the main BBC page (YouTube channel pages of programmes mainly as it seems).

**Table 39 BBC's YouTube channel pages and main YouTube page, October 2016**

Name of channel	Type	Videos	Subscribers	Format of videos
BBC (Main page)	Channel / Corporate	19 889	3 339 065	Extracts, Trailers, Best-ofs, Promotional videos
BBC Three	Digital	643	124 082	Extracts, short form catch-up, best-ofs, original digital content
BBC Sports	Channel	178	40 719	Extracts, best-ofs, Promotional videos
BBC Strictly Come Dancing	Programme	810	52 109	Best-ofs, Extracts
Doctor Who	Programme	893	805 000	Trailers, Extracts, Best-ofs, Original digital content
BBC Radio 1	Channel	3 015	3 289 265	Extracts, Best-ofs, Long and short form content
BBC Radio 2	Channel	721	38 134	Extracts, Best-ofs, Long and short form content
BBC Radio 3	Channel	706	17 862	Extracts, Best-ofs, Long and short form content
BBC Radio 4	Channel	213	0	Extracts, Best-ofs
BBC Radio 6 Music	Channel	434	20 198	Extracts, Best-ofs
Cbeebies	Channel	1 499	190 311	Short form catch-up, Extracts, Best-ofs
BBC Scotland	Channel	231	4 194	Extracts, Best-ofs
CBBC	Channel	2 344	130 698	Original digital content, Best ofs, Extracts
BBC Northern Ireland	Channel	690	5 852	Extracts, Best-ofs



Top Gear	Programme	944	5 087 445	Extracts, best-ofs, Promotional videos
BBC Worldwide	Channel	5 854	1 094 332	Extracts, Best-ofs, short format catch-up
BBC News	Channel	5 924	929 300	Extracts, Short form content, short video clips
BBC Children in Need	Programme	514	31 517	Short form video content, Promotional videos
BBC Music	Channel	2 029	89 505	Extracts, Short form catch up, best-ofs
bbcradio1takeiton	Programme	141	2 185	Extracts, short form content
BBC Careers	Corporate	197	4 192	Promotional videos

Source: OBS desk research October 2016

### 5.2.2 BBC's channel presence on Dailymotion

No official identified channel, one BBC channel with 49 videos and 422 subscribers, latest video posted 8 years ago (<http://www.dailymotion.com/TotalBBC>).



## 5.3 ITV – commercial broadcaster

### 5.3.1 ITV's channel presence on YouTube

Only link to 5 other YouTube channels on main page but channel pages exist for ITV News, ITV First Look (promotional page of upcoming programming with trailers, only 2 videos on page) which seem to belong to the company. Of course, a multitude of other ITV channel pages exist but they seem not to be official or to belong to the company.

**Table 40** ITV's YouTube channel pages and main YouTube page, October 2016

Name of channel	Type	Videos	Subscribers	Format of videos
ITV (Main page)	Channel / Corporate	1 387	127 725	Trailers, Extracts, Promotional videos, Best-ofs
ITV2	Channel	650	18 244	Trailers, Extracts, Promotional videos, Best-ofs
ITV4realfans	Channel	62	1 368	Extracts, Best-ofs
This morning	Programme	3 512	125 192	Extracts, Best-ofs, short format catch-up
Britain's Got Talent	Programme	1 553	6 663 332	Extracts, short format catch-up, Best-ofs
The X Factor UK	Programme	3 492	5 077 161	Extracts, short format catch-up, Best-ofs, Digital exclusive content

Source: OBS desk research October 2016

We found additional 7 ITV channels not linked on the main page. 6 out of these channels were for programmes with short extracts, trailers, best-ofs: [Lorraine](#), [Good Morning Britain](#), [Loose Women](#), [Judge Rinder](#), [The Jeremy Kyle Show](#), [Channel Mum](#) and one for trailers for upcoming programmes [ITV First Look](#). The format of the videos posted on these channels are similar to these posted in the other YouTube channels of ITV.

### 5.3.2 ITV's channel presence on Dailymotion

Channel not marked official (missing the tick), not sure if channel page genuine. Mainly catch-up videos of BBC (Eastenders) and Channel 4 (Hollyoaks) programmes therefore channel is not deemed to be official and not included for ITV.

**Table 41** ITV's Dailymotion channel pages and main YouTube page, October 2016

Name of channel	Type	Videos	Subscribers	Format of videos
ITV (Main page not official)	Channel / Corporate	86	204	Catch-up of Hollyoaks, Eastenders, Doraemon in Hindi

Source: OBS desk research October 2016



## 5.4 SKY – pay TV

### 5.4.1 SKY's channel presence on YouTube

Table 42 Sky's YouTube channels and main YouTube page, October 2016

Name of channel	Type	Videos	Subscribers	Format of videos
SKY (Main page)	Channel / Corporate	401	26 188	Promotional video, Extracts, Trailers
Sky Movies	Channel	641	19 950	Extracts, Trailers, Promotional videos
Sky First Episodes	Programme	38	11 842	Extracts, Trailers, Promotional videos
Soccer AM	Programme	673	411 751	Extracts, Best-ofs
Sky 1	Channel	1 040	38 058	Extracts, Trailers, Promotional videos
Sky Atlantic	Channel	628	21 405	Apparently no longer operated
Sky Arts	Channel	485	8 876	Extracts
Sky Living	Channel	646	10 782	Extracts, Trailers, Promotional videos
Sky News	Channel	7 467	417 438	Extracts, Best-ofs, short format content
Sky Help	Digital	52	2 932	Short format videos for user help
Go To Dance Sky 1	Programme	644	75 236	Extracts, Best-ofs, short format content
Team Sky	Corporate	143	64 459	Extracts, Best-ofs, Promotional videos, Corporate Communication
SkyRainforestRescue	Corporate	77	652	Promotional video, Extracts

Source: OBS desk research October 2016

### 5.4.2 SKY's channel presence on Dailymotion

No official Sky Dailymotion channel page could be found as of October 2016.



## 5.5 UKTV's Dave – thematic channel

Dave is part of UKTV's TV channels portfolio. UKTV main YouTube channel page does not link to any other channel page and counts 1 055 videos and 12 874 subscribers as of October 2016 (as they are no links to other channel pages of the group, Dave was chosen as the thematic channel for the UK). Other channels part of the linear channel portfolio of UKTV are the thematic channels W (Entertainment), Drama, Really, Dave ('home of witty banter'), Good Food (Food), Alibi (Crime Drama), Gold (Classic Comedy), Yesterday (History), Home (Home and Gardens), Eden (Nature and Science) and the catch-up service UKTV Play.

### 5.5.1 UKTV's Dave channel presence on YouTube

Table 43 Dave's YouTube channels and main channel page on YouTube, October 2016

Name of channel	Type	Videos	Subscribers	Format of videos
Dave (Main page)	Channel	273	10 963	Extracts,
UKTV	Corporate	1 064	12 876	Extracts, Best-ofs, Trailers, Promotional videos
Good Food Channel	Channel	204	13 231	Extracts, Trailers
Eden TV Channel	Channel	2	28	Extracts
Alibi Channel	Channel	70	621	Trailers, Extracts, Promotional videos

Source: OBS desk research October 2016

### 5.5.2 UKTV's Dave channel presence on Dailymotion

No official UKTV or Dave channel page on Dailymotion.





## 6. Germany

### 6.1 German broadcasters on YouTube – Summary tables

In Germany, the selected broadcasters are:

- ZDF, for the public broadcaster
- ProSieben, the commercial channel belonging to the ProSieben.Sat1 group
- Sky Deutschland, the main pay TV operator in Germany
- DMAX, the thematic channel centred around mens health

Table 44 Summary of use of YouTube by German broadcasters

	Promotional videos for TV programmes and 'best-ofs'	Trailers of TV programmes to come	Extracts of TV programmes	Catch-up full length videos (>20 min)	Catch-up short format videos (<20 min)	Original digital content
ZDF	X	X	X	X	X	X
ProSiebenSat.1	X	X	X		X	X
Sky Deutschland	X	X	X		X	

Source: OBS desk research October 2016

Table 45 Number of YouTube channels by type for each broadcaster

	Channel / Corporate	Programme	Digital	Total
ZDF	3	6	0	9
ProSiebenSat.1	2	15	2	19
Sky Deutschland	3	0	0	3
Thematic				
<b>Total</b>	<b>8</b>	<b>21</b>	<b>2</b>	<b>31</b>
<i>in percentages</i>	<i>26%</i>	<i>68%</i>	<i>6%</i>	<i>100%</i>

Source: OBS desk research October 2016

Table 46 Main statistics on YouTube channel pages of broadcasters, in units

	YouTube channel pages	YouTube subscribers (cumulated)	YouTube videos (cumulated)
ZDF	9	781 123	3 616
ProSiebenSat.1	19	3 419 000	6 880
Sky Deutschland	3	524 404	2 940



Source: OBS desk research October 2016

### 6.1.1 Ranking of broadcasters official YouTube channels and broadcasters web sites

**Table 47** Number of unique viewers, minutes per viewers and videos per viewer for broadcasters YouTube channels and websites June 2016, in units

	Unique Viewers YouTube channel	Unique Viewers broadcasters websites	Minutes per viewer YouTube channel	Minutes per viewer broadcasters websites	Videos per viewer YouTube channels	Videos per viewer broadcasters websites
ZDF*	960 000	591 000	10,3	91,5	3,1	5,6
ProSiebenSat.1**	5 423 000	9 169 000	47,1	6,3	15,3	5,9
Sky Deutschland***	n.a.	259 000	n.a.	25,3	n.a.	4,1

Source : comScore Video Metrix – June 2016 \*For ZDF’s YouTube channel, as several channels exist and it would be false to culminate the figures, zdf cid @ YouTube has been chosen for the main figures on YouTube \*\* ProSiebenSat.1’s YouTube channels and presence are managed under the of its acquired MCN Studio 71. \*\*\*In the comScore figures on YouTube channels, no Sky branded YouTube channel has been found (could possible exist under another brand name).

**Table 48** Total unique viewers of YouTube channels in Germany – content and ads, June 2016

NOT AVAILABLE IN THE PUBLIC VERSION OF THE REPORT DUE TO COPYRIGHT REASONS

Source: comScore Video Metrix – June 2016

**Table 49** Total unique viewers all video properties in Germany – content and ads, June 2016

NOT AVAILABLE IN THE PUBLIC VERSION OF THE REPORT DUE TO COPYRIGHT REASONS

Source: comScore Video Metrix – June 2016



## 6.2 ZDF – public broadcaster

### 6.2.1 ZDF's channel presence on YouTube

Table 50 ZDF YouTube channels and main YouTube page, October 2016

Name of channel	Type	Videos	Subscribers	Format of videos
ZDF (Main page)	Channel	656	81 886	Extracts, Exclusive content (VR/360), promotional videos, short and long format catch-up for some content/news
ZDFlachbar	Programme	347	23 777	Extracts, best-ofs
Terra X Lesch & Co	Programme	40	93 163	Extracts, short form catch-up
ZDF Herzkino	Programme	12	658	Extracts, Trailers
ZDFneo	Channel	313	87 683	Trailers, Extracts, best-ofs, short format catch-up
NEO Magazin Royale	Programme	377	343 140	Extracts, best-ofs
ZDFsport	Programme	1 005	117 480	Extracts, best-ofs, short format catch-up
ZDFtivi	Channel	815	28 166	Extracts,
maybritillner	Programme	51	5 170	Extracts, short form catch-up

Source: OBS desk research October 2016

Existence of a ZDF Mediathek page with 36 videos and no longer active since 2 years. The channel included long format catch-up of TV series broadcasted on ZDF.

### 6.2.2 ZDF's channel presence on Dailymotion

No official Dailymotion channel page <http://www.dailymotion.com/users/relevance/search/zdf/1> but some false channels with 1 video posted.



### 6.3 ProSiebenSat.1 channel presence on YouTube – commercial broadcaster

Table 51 ProSieben's YouTube channels and main YouTube page, October 2016

Name of channel	Type	Videos	Subscribers	Format of videos
ProSieben (Main page)	Channel	151	n.a.	Trailers, Extracts, Promotional videos, short format catch-up
Studio71	Digital	257	38 581	Original digital content, Promotional videos
Germany's next Topmodel	Programme	767	269 566	Trailers, Extracts, Promotional videos, Best-ofs
Circus HalliGalli	Programme	405	450 481	Extracts, Promotional videos, short format catch-up, Trailers
Go to Dance Germany	Programme	14	50 074	Extracts
In the Box	Programme	70	6 191	Extracts, Trailers
The Voice of Germany - Offiziell	Programme	752	260 947	Extracts, Best-ofs, Promotional videos, short format catch-up
Galileo	Programme	1 375	1 034 454	Extracts, short format catch-up
taff	Programme	1 381	612 225	Extracts
Mein bester Freund	Programme	56	32 427	Extracts, short format catch-up
Frankenstein	Digital	16	21 524	Original digital content
ProSieben.Sat1 Karriere	Corporate	32	262	Promotional videos, Corporate Communication, Trailers
Austria's next Topmodel	Programme	232	1 674	Extracts, Trailers
Knallerfrauen	Programme	391	446 995	Extracts, Trailers
Studio Amani	Programme	51	15 242	Extracts, Trailers, short format catch-up
Switch Reloaded	Programme	706	141 708	Extracts, Best-ofs
Paula kommt - Sex und gute Nachtgeschichten	Programme	224	26 850	Extracts
71comedy	Programme	0	9 260	
Keep Your Light Shining	Programme	0	539	

Source: OBS desk research October 2016

No channel page on Dailymotion could be found as of October 2016.



## 6.4 Sky Deutschland channel presence on YouTube – Pay TV

Table 52 Sky Deutschland’s YouTube channels and main YouTube page, October 2016

Name of channel	Type	Videos	Subscribers	Format of videos
Sky Deutschland (Main page)	Channel / Corporate	419	11 484	Promotional videos, Extracts, Trailers, short format catch-up
Sky Sport HD	Channel	1 093	505 216	Short and long format catch-up, Best-ofs, Extracts, Promotional videos
skysportaustria	Channel	1 428	7 704	Best-ofs, Extracts, Trailers

Source: OBS desk research October 2016

No Dailymotion channel could be found as of October 2016.



## 7. Italy

### 7.1 Italian broadcasters on YouTube – Summary tables

The selected broadcasters in Italy are:

- RAI – the public broadcaster, Radiotelevisione Italiana SP which operates the channels Rai Uno, Rai Due, Rai Tre, Rai 4, Rai 5, Rai Scuola, Rai Storia, Rai Gulp, Rai Sport 1, Rai Sport 2, Rai Movie, Rai Premium, Rai Yoyo, Rai News, Rai Italia, Rai World Premium and several regional windows
- R.T.I./Mediaset – the commercial broadcaster Reti Televisive Italiane S.P.A (R.T.I), belonging to Mediaset S.P.A, which operates the channels Italia 1, Italia 2, Canale 5, Rete 4, Iris, La 5, TOPcrime, TGCom 24 and Mediaset Extra
- Sky Italia – pay TV operator with a large selection of pay TV channels broadcasted in Italy
- Fine Living the thematic channel

Table 53 Summary of use of YouTube by Italian broadcasters

	Promotional videos for programmes 'best-ofs'	TV and Trailers of TV programmes to come	Extracts of TV programmes	Catch-up full length videos (>20 min)	Catch-up short format videos (<20 min)	Original digital content
RAI	X	X	X		X	
R.T.I	X		X			
Sky Italia	X	X	X	X	X*	
Thematic						

Source: OBS desk research October 2016 \*Catch-up in long format for only one TV programme, a talk show

Table 54 Number of YouTube channels by type for each broadcaster

	Channel / Corporate	Programme	Digital	Total
RAI	1	0	0	1
R.T.I	1	3	0	4
Sky Italia	2	3	0	5
Thematic				0
<b>Total</b>	<b>4</b>	<b>6</b>	<b>0</b>	<b>10</b>
<i>in percentages</i>	<i>40%</i>	<i>60%</i>	<i>0%</i>	<i>1</i>

Source: OBS desk research October 2016



**Table 55 Main statistics on YouTube channel pages of broadcasters, in units**

	YouTube channel pages	YouTube subscribers (cumulated)	YouTube videos (cumulated)
RAI	1	1 346 967	3 873
R.T.I	4	33 684	1 499
Sky Italia	5	1 078 315	2 969
Thematic			

Source: OBS desk research October 2016

### 7.1.1 Ranking of broadcasters official YouTube channel and broadcasters web sites

**Table 56 Number of unique viewers, minutes per viewers and videos per viewer for broadcasters YouTube channels and websites June 2016, in units**

	Unique Viewers YouTube channel	Unique Viewers broadcasters websites	Minutes per viewer YouTube channel	Minutes per viewer broadcasters websites	Videos per viewer YouTube channels	Videos per viewer broadcasters websites
RAI	500 000	3 899 000	9,1	9,4	3,4	7,2
R.T.I (Mediaset)	101 000	5 516 000	6,2	124,1	3,3	17,9
Sky Italia	261 000	1 864 000	7,9	49,1	3,6	6,2
Thematic						

Source: comScore Video Metrix – June 2016

**Table 57 Total Unique viewers of YouTube channels in Italy – content and ads, June 2016**

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**Table 58 Total unique viewers all video properties in Italy - content and ads June 2016**

NOT AVAILABLE IN THE PUBLIC VERSION OF THE REPORT DUE TO COPYRIGHT REASONS

Source: comScore Video Metrix – June 2016



## 7.2 RAI’s channel presence on YouTube – public broadcaster

The page of [RAI](#) states that 20 other channels are part of the RAI channels. However, the main channel page does not link to any other channel page and is missing the official check. Therefore we were not able to find these other 19 channels as they seem to not refer to channels belonging to RAI but rather programmes. All videos and information’s on the channel page link back to the newly launched offer of RAI, [RAI Play](#), which offer the full-length videos of the extracts and video clips on the main page.

We found one other channel page for a RAI programme; *The Voice of Italy* counting 777 videos and 178 646 subscribers and offering mainly 35 second extracts of the show. The page has the official check but is not linked directly to RAI main page (which lacks the official check) and does only have a link to *The Voice Global* channel page.

Table 59 RAI’s YouTube channels and main YouTube page, October 2016

Name of channel	Type	Videos	Subscribers	Format of videos
RAI (Main page)	Corporate / Channel	3 873	1 346 967	Trailers, Promotional videos, Extracts, short form catch-up, best-ofs

Source: OBS desk research October 2016

RAI seems to not have an official Dailymotion channel page as of October 2016.





## 7.3 Mediaset - Reti Televisive Italia S.P.A (R.T.I) – commercial broadcaster

### 7.3.1 Mediaset/R.T.I's channel presence on YouTube

Table 60 R.T.I.'s YouTube channels and main YouTube page, October 2016

Name of channel	Type	Videos	Subscribers	Format of videos
Mediaset (Main page)	Corporate	1 132	22 809	Extracts, trailers, Promotional videos
Pronto in Tavola	Programme	189	n.a.	Extracts (cooking videos)
Temptation Island	Programme	49	3 446	Trailers, Extracts, best-ofs
Grande Fratello Vip	Programme	129	7 429	Extracts

Source: OBS desk research October 2016

### 7.3.2 Mediaset/R.T.I's channel presence on Dailymotion

R.T.I channels seem to not have an official channel page. There is a page for Canale 5, lacking the official check (and with only 5 videos and 27 subscribers) and for Mediaset (with 19 videos and 20 subscribers) which is also not official.

## 7.4 Sky Italia channel presence on YouTube – pay TV

Table 61 Sky Italia's channels and main YouTube page, October 2016

Name of channel	Type	Videos	Subscribers	Format of videos
Sky (Main page)	Channel / Corporate	876	36 887	Extracts, Long and short format catch-up of one TV show, Trailers, Promotional videos
X Factor Italia	Programme	427	240 704	Extracts, Best-ofs
MasterChef Italia	Programme	271	544 112	No longer available



cielotvitalia	Channel	1 243	85 660	Extracts, Trailers, Promotional videos
Italia's Got Talent	Programme	152	170 952	Extracts, Best-ofs, Trailers

Source: OBS desk research October 2016

No official channel page for Sky Italia could be found on Dailymotion.



## 8. Spain

### 8.1 Spanish broadcasters on YouTube – Summary tables

In Spain, the selected broadcasters are:

- Corporacion Radio Television Espanola (RTVE) – the public broadcaster with its channels La 1, La 2, Clan, Teleduarte and Canal 24 Horas.
- Atresmedia, belonging to Grupo Planeta – the commercial broadcaster with its channels broadcasted in Spain Antena 3, la Sexta, Neox, Nova, Mega and Atreseries.
- Movistar+ (DTS – Distribuidora de Television Digital S.A.U) belonging to Telefonica – the pay TV operators with its 18 Movistar branded channels (#0, Movistar Series, Movistar Series Xtra, Movistar Estrenos, Movistar Xtra...) and also operating a VOD service, Yomvi.
- DKiss – thematic channel

**Table 62 Summary of use of YouTube by Italian broadcasters**

	Promotional videos for TV programmes and 'best-ofs'	Trailers of TV programmes to come	Extracts of TV programmes	Catch-up full length videos (>20 min)	Catch-up short format videos (<20 min)	Original digital content
RTVE		X	X		X	X*
Atresmedia	X	X	X		X	X
Movistar+	X	X	X	X	X	
Thematic						

Source: OBS desk research October 2016 \* For RTVE, original digital content were web series made by students of its Instituto RTVE channel

**Table 63 Number of YouTube channels by type for each broadcaster**

	Channel / Corporate	Programme	Digital	Total
RTVE	2	1	0	3
Atresmedia	9	15	8	32
Movistar+	2	3	0	5
Thematic				0
<b>Total</b>	<b>13</b>	<b>19</b>	<b>8</b>	<b>40</b>
<i>in percentages</i>	<i>33%</i>	<i>48%</i>	<i>20%</i>	<i>1</i>

Source: OBS desk research October 2016



**Table 64 Main statistics on YouTube channel pages of broadcasters, in units**

	YouTube channel pages	YouTube subscribers (cumulated)	YouTube videos (cumulated)
RTVE	3	171 629	6 881
Atresmedia	32	3 259 084	68 053
Movistar+	5	673 676	5 882
Thematic			

Source: OBS desk research October 2016

### 8.1.1 Ranking of broadcasters official YouTube channels and broadcasters web sites

**Table 65 Number of unique viewers, minutes per viewers and videos per viewer for broadcasters YouTube channels and websites June 2016, in units**

	Unique Viewers YouTube channel	Unique Viewers broadcasters websites	Minutes per viewer YouTube channel	Minutes per viewer broadcasters websites	Videos per viewer YouTube channels	Videos per viewer broadcasters websites
RTVE	236 000	1 575 000	5,7	136,1	2,6	36,7
Atresmedia	1 907 000	1 992 000	29,8	140,3	9,6	7,5
Movistar+	n.a.	382 000	n.a.	11,1	n.a.	6,4
Thematic						

Source: comScore Video Metrix – June 2016

**Table 66 Total unique viewers of YouTube channels in Spain – content and ads, June 2016**

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Source: comScore Video Metrix – June 2016 - We could not find the YouTube channel for Movistar+. The Canal+ branded channel seems to be the French broadcaster's channel and not the Movistar+. Telefonica does not have a channel in the comScore rankings.

**Table 67 Total unique viewers all video properties in Spain – content and ads, June 2016**

NOT AVAILABLE IN THE PUBLIC VERSION OF THE REPORT DUE TO COPYRIGHT REASONS

Source: comScore Video Metrix – June 2016

For Movistar+, as the service was rebranded from Canal+ to Movistar in 2015, it might be that this rebranding was not yet taken into account in the comScore figures. No Movistar site was available in the statistics for Spain in June 2016



## 8.2 RTVE channel presence on YouTube – public broadcaster

Table 68 ARTVE’s YouTube channels and YouTube page, October 2016

Name of channel	Type	Videos	Subscribers	Format of videos
RTVE (Main page)	Corporate / Channels	6 786	170 462	Extracts, Trailers, best-ofs, short format catch-up
Conoce el internet	Programme	32	699	Extracts, short format catch-up, Trailers
Instituto RTVE	Corporate	63	468	Original digital content (webseries made by students of the institute), Extracts

Source: OBS desk research October 2016

No official channel page on Dailymotion could be found as of October 2016.



### 8.3 Atresmedia channel presence on YouTube– commercial broadcaster

Link to flooxer.com on all YouTube channel pages which is the digital platform “à la YouTube” operated by Atresmedia with original digital content.

Table 69 Atresmedia’s YouTube channels and YouTube page, October 2016

Name of channel	Type	Videos	Subscribers	Format of videos
Atresmedia (Main page)	Corporate	51	n.a.	Promotional videos, Extracts
Flooxer	Digital	9	11 095	Promotional videos, Extracts, Trailers for Original digital content
Atrestube (channel for YouTube Red)	Digital	46	6 944	Extracts, Promotional videos, Trailers
Fundacion Atresmedia	Corporate	22	226	Extracts, Promotional videos
Ponle Freno	Programme	155	476	Extracts, Promotional videos
Antena 3	Channel	13 723	1 967 745	Extracts, Trailers, Promotional videos
laSexta	Channel	12 195	461 382	Extracts, Trailers, Promotional videos
Objetivo TV	Corporate	356	2 819	Extracts, Promotional videos
Telenovelas	Programme	1 891	67 919	Extracts
TopTrendingVideo	Digital	1 575	350 531	Original digital content, Extracts
Top Style	Digital	321	25 853	Original digital content, Extracts
Se estrena	Digital (website)	577	33 509	Trailer, Extracts (channel of a cinema website operated by Atresmedia), Original digital content
CLB	Digital (website)	413	60 060	Extracts (channel of a celebrity website operated by Atresmedia), Original digital content
Cocinatis	Programme	342	4 864	Extracts, Short format catch-up
El Chiringuito de Jugones	Programme	3 279	123 037	Extracts, Short format catch-up, best-ofs
Antena 3 Noticias	Programme	6 321	26 978	Extracts, Short format catch-up



laSexta Noticias	Programme	12 509	33 037	Extracts, Short format catch-up
Videoencuentros	Programme	269	15 167	Long format catch-up (no longer active since 1 year)
Centimetros cubicos	Programme	624	13 318	Extracts, Short format catch-up
Correr y Fitness	Programme	128	1 167	Extracts
How To Play By	Programme	88	n.a.	Extracts
TecnoXplora	Digital (website)	231	20 664	Extracts (channel of a technology website operated by Atresmedia)
CienciaXplora	Digital (website)	424	19 736	Extracts (channel of a science website operated by Atresmedia)
Onda Cero	Programme (Radio)	90	1 165	Extracts of radio programme
EuropaFM	Programme (Radio)	146	4 228	Extracts of radio programme
Melodia FM	Channel (Radio)	35	503	Short format catch-up
Consejos para mascotas	Programme	171	n.a.	Extracts
Viajestic	Programme	426	934	Extracts
Defconplay	Programme	74	281	Extracts, short format catch-up
Antena 3 Canaries	Channel	11 445	5 446	Extracts
Atresmedia Cine	Corporate	99	n.A.	Trailers, Extracts
Atresmedia Radio	Corporate (Radio)	18	n.A.	Extracts (not active since 2 years)

Source: OBS desk research October 2016

No official channel page on Dailymotion could be found as of October 2016. As Atresmedia own its own digital video platform flooxer.com this comes to no surprise.



## 8.4 Movistar+ channel presence on YouTube - pay TV

Table 70 Movistar+'s YouTube channels and main YouTube page, October 2016

Name of channel	Type	Videos	Subscribers	Format of videos
Movistar+ (Main page)	Corporate / Channel	1 942	42 436	Trailers, Extracts, Best-ofs, Promotional videos, short and long format catch-up
#0	Channel	1 809	58 525	Extracts, short format catch-up
El Dia Despues	Programme	1 005	382 660	Extracts
Ilustres Ignorantes	Programme	476	94 342	Extracts, short and long format catch-up
Late Motiv	Programme	650	95 713	Extracts, short format catch-up

Source: OBS desk research October 2016

No official channel page on Dailymotion could be found as of October 2016. <http://www.dailymotion.com/users/relevance/search/movistar/1> (and neither for parent company Telefonica <http://www.dailymotion.com/users/relevance/search/telefonica/1>)





## Table of tables

Table 1 Selected broadcasters by business model .....	5
Table 2 Summary of YouTube uses - format of videos by public broadcasters in EU-5 .....	15
Table 3 Types of YouTube channels used by public broadcasters EU-5 .....	15
Table 4 Main statistics on YouTube channels of public broadcasters EU-5.....	16
Table 5 Main statistics on broadcasters YouTube channels and website (viewers, minutes and videos) in their respective countries, in units .....	16
Table 6 Summary of YouTube uses - format of videos by commercial broadcasters in EU-5 .....	17
Table 7 Types of YouTube channels used by commercial broadcasters EU-5 .....	18
Table 8 Main statistics on YouTube channels of commercial broadcasters EU-5 .....	18
Table 9 Main statistics on broadcasters YouTube channels and website (viewers, minutes and videos) in their respective countries, in units .....	19
Table 10 Summary of YouTube uses - format of videos by pay TV broadcasters in EU-5 .....	20
Table 11 Types of YouTube channels used by pay TV broadcasters EU-5 .....	21
Table 12 Main statistics on YouTube channels of pay TV broadcasters EU-5 .....	21
Table 13 Main statistics on broadcasters YouTube channels and website (viewers, minutes and videos) in their respective countries, in units.....	22
Table 14 Summary of YouTube uses - format of videos by thematic channels in EU-5 .....	23
Table 15 Main statistics on YouTube channels of thematic channels EU-5.....	24
Table 16 Investments in and acquisitions of MCNs 2012 - 2016 .....	26
Table 17 MCN valuation estimates at point of investment, in USD million .....	27
Table 18 Summary of YouTube channel use by French broadcasters, October 2016 .....	30
Table 19 Number of YouTube channels by type for each broadcaster .....	31
Table 20 Summary of use of Dailymotion by French broadcasters, October 2016 .....	31
Table 21 Number of Dailymotion channels by type for each broadcaster .....	31
Table 22 Summary table – Main stats on YouTube and Dailymotion channel pages for French Broadcasters .....	32
Table 23 Number of unique viewers, minutes per viewer and videos per viewer for broadcasters YouTube channels and websites June 2016, in units.....	33
Table 24 Total unique viewers of YouTube channels in France – content and ads, June 2016 .....	34
Table 25 Total unique viewers all video properties in France – content and ads, June 2016 .....	34
Table 26 France Télévisions YouTube channels and main YouTube page, October 2016.....	35
Table 27 France Télévision Dailymotion channels and main channel page .....	37
Table 28 TF1 YouTube channels and main YouTube page, October 2016.....	39
Table 29 Canal+’s YouTube channels and main YouTube page, October 2016.....	42
Table 30 Dailymotion – Canal+ channels linked on main channel page.....	45



Table 31 YouTube – Chérie 25 channels linked on main channel page.....	47
Table 32 Dailymotion – Chérie 25 channels linked on main channel page .....	47
Table 33 Summary of YouTube channel use by British broadcasters, October 2016.....	48
Table 34 Number of YouTube channels by type for each broadcaster .....	48
Table 35 Summary table - Main stats for UK broadcasters YouTube channel pages .....	49
Table 36 Number of unique viewers, minutes per viewer and videos per viewer for broadcasters YouTube channels and websites June 2016, in units.....	49
Table 37 Total unique viewer of YouTube channels in the United Kingdom – content and ads, June 2016 .....	50
Table 38 Total unique viewers all video properties in the United Kingdom, June 2016 .....	50
Table 39 BBC’s YouTube channel pages and main YouTube page, October 2016.....	51
Table 40 ITV’s YouTube channel pages and main YouTube page, October 2016.....	53
Table 41 ITV’s Dailymotion channel pages and main YouTube page, October 2016 .....	53
Table 42 Sky’s YouTube channels and main YouTube page, October 2016 .....	54
Table 43 Dave’s YouTube channels and main channel page on YouTube, October 2016.....	55
Table 44 Summary of use of YouTube by German broadcasters.....	56
Table 45 Number of YouTube channels by type for each broadcaster .....	56
Table 46 Main statistics on YouTube channel pages of broadcasters, in units .....	56
Table 47 Number of unique viewers, minutes per viewers and videos per viewer for broadcasters YouTube channels and websites June 2016, in units.....	57
Table 48 Total unique viewers of YouTube channels in Germany – content and ads, June 2016 .....	57
Table 49 Total unique viewers all video properties in Germany – content and ads, June 2016.....	57
Table 50 ZDF YouTube channels and main YouTube page, October 2016 .....	58
Table 51 ProSieben’s YouTube channels and main YouTube page, October 2016 .....	59
Table 52 Sky Deutschland’s YouTube channels and main YouTube page, October 2016 .....	60
Table 53 Summary of use of YouTube by Italian broadcasters.....	61
Table 54 Number of YouTube channels by type for each broadcaster .....	61
Table 55 Main statistics on YouTube channel pages of broadcasters, in units .....	62
Table 56 Number of unique viewers, minutes per viewers and videos per viewer for broadcasters YouTube channels and websites June 2016, in units.....	62
Table 57 Total Unique viewers of YouTube channels in Italy – content and ads, June 2016.....	62
Table 58 Total unique viewers all video properties in Italy - content and ads June 2016.....	62
Table 59 RAI’s YouTube channels and main YouTube page, October 2016 .....	63
Table 60 R.T.I.’s YouTube channels and main YouTube page, October 2016.....	64
Table 61 Sky Italia’s channels and main YouTube page, October 2016.....	64
Table 62 Summary of use of YouTube by Italian broadcasters.....	66



Table 63 Number of YouTube channels by type for each broadcaster .....	66
Table 64 Main statistics on YouTube channel pages of broadcasters, in units .....	67
Table 65 Number of unique viewers, minutes per viewers and videos per viewer for broadcasters YouTube channels and websites June 2016, in units.....	67
Table 66 Total unique viewers of YouTube channels in Spain – content and ads, June 2016.....	67
Table 67 Total unique viewers all video properties in Spain – content and ads, June 2016.....	67
Table 68 ARTVE’s YouTube channels and YouTube page, October 2016 .....	68
Table 69 Atresmedia’s YouTube channels and YouTube page, October 2016 .....	69
Table 70 Movistar+’s YouTube channels and main YouTube page, October 2016 .....	71