OBSERVATOIRE EUROPÉEN DE L'AUDIOVISUEL
EUROPEAN AUDIOVISUAL OBSERVATORY
EUROPÄISCHE AUDIOVISUELLE INFORMATIONSSTELLE

Note 5 - The Visibility Of Film On On-Demand Platforms: Germany, France & The United Kingdom

Gilles Fontaine

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Director of publication:

Susanne Nikoltchev, Executive Director European Audiovisual Observatory

Supervision:

Gilles Fontaine, Head of Department for Information on Markets and Financing, European Audiovisual Observatory

Author:

Gilles Fontaine, Head of Department for Information on Markets and Financing, European Audiovisual Observatory

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NOTE 5: THE VISIBILITY OF FILM ON ON-DEMAND PLATFORMS – GERMANY, FRANCE & UNITED KINGDOM

Author: Gilles Fontaine

1 Objectives and methodology of this note

- The European Audiovisual Observatory monitors since 2014 the films catalogues of both transactional and subscription on-demand services. The composition of the catalogues gives a first insight of the distribution policy of the services and of the diversity of audiovisual works made available to the public.
- However, unlike in linear television, in an on-demand world the prominence of European works cannot be guaranteed only by the number of European films included in the catalogues of the services. Equally important is the way films are promoted. One of the solutions to promote films on on-demand services is to make them visible in the services home pages.
- In that context, this note is a first attempt to measure the visibility of films, and notably the visibility of European through the quantitative analysis of the services home pages
- The note builds on data gathered by the company AQOA. AQOA monitors on a daily basis the films put forward by a representative sample of on-demand services, available either on cable/IPTV or Over-the-top, and covering at least 70% of the on-demand transactional market. AQOA currently covers three European markets, Germany, France and the United Kingdom and plans to open new territories.

Table 1 List of on demand services in the sample

Germany	France	United Kingdom
Amazon Instant Video	CanalPlay	Amazon Instant Video
Google play	Google Play	BT Box Office
iTunes	iTunes	Google Play
Maxdome	MyTF1VOD	iTunes
PS Store	Orange	PS Store
Sky	Pluzz	Sky
Unity Media	SFR	Virgin Media
Videobuster	Sony PS	XBOX Live
Videociety	XBOX Live	
Videoload		

AQOA has identified the promotional spaces for each of the services of the sample and, through a network of correspondents collects the titles of the films shown on these promotional spaces. The titles are tagged by AQOA using a variety of criteria, including the genre, year of production and country origin, mainly based on IMDB information.

This note is based on the data collected between the 1st of October and the 1st of November in France, Germany and the UK. Even is the methodology is sound and the conclusions based on a significant number of observations, it must be noted:

- that a limited part of the films promoted by the services could not be clearly identified.
- that some promotional spots are dedicated to promotional bundles of several films, often catalogue films; these bundled films were not identified and therefore not considered in the analysis.

Throughout this note, figures are analysed under three different angles:

- The diversity of the use of promotional spots, i.e. the number of films which are promoted no matter their country of origin.
- The share of European films among films which are promoted, not taking into account the intensity of the promotion
- The weighted share of European films among promotional spots, taking into account the number of promotional spots allocated to each film.

2 Main findings from the analysis of on-demand services in Germany, France in UK

- In October 2015, between 221 (in France) and 348 (in Germany) different films were promoted by on-demand services, meaning that only a small minority of the catalogue is actually promoted. Most of these films were recent films (produced in 2014 or 2015)[1].
- About one-third of films which were promoted were European films[2]. In Germany, the majority of European films promoted were non-national, whereas, national films accounted for about 60% of promoted films in France and the UK.
- In the three countries, the share of US films among films promoted was in the range of 55%.

Table 2 Overview of films promoted in Germany, France and the UK

	DE	FR	UK
Number of unique titles promoted	348	221	231
Of which share of 201-2015 titles	65%	71%	80%
Origin of films promoted:			
National	9%	20%	18%
European non-national	24%	15%	12%
Sub-total: European	**33%**	**35%**	**30%**
USA	57%	55%	55%
Others	9%	9%	14%
NA	1%	1%	1%

- The number of “promotional spots” available on the on-demand services varied widely between services, due probably both to technical constraints and to the marketing strategy of each service.
- In October 2015, all three countries, recent films (produced in 2014 or 2015) were allocated 86% or more of all available promotional spots[3].
- Among these recent films, a limited number benefited from the most visibility: the 10 most promoted films were allocated about 40% of all promotional spots.

[1] Some promotional spots are dedicated to promotional bundles of several films, often catalogue films; these bundled films were not identified and therefore not considered in the analysis. The share of recent films is therefore somehow overstated.

[2] In case of coproduction, the country of origin is the first country indicated by IMDB among coproducers.

[3] Some promotional spots are dedicated to promotional bundles of several films, often catalogue films; these bundled films were not identified and therefore not considered in the analysis. The share of recent films is therefore somehow overstated.

- European films were allocated between 21% (in the UK) and 33% (in France) of promotional spots. In Germany, national films and European non-national films accounted for approximately the same share, whereas, in France in the UK, national films represented approximately two thirds of European films and European non-national films one third.

Table 3 Overview of promotional spots in Germany, France and the UK

	DE	FR	UK
Number of promotional spots	8316	6671	10024
Share of promotional spots allocated to the 10 most promoted films	37%	43%	40%
Share of promotional spots allocated to 2014-2015 titles	86%	92%	96%
Share of promotional spots by origin of film:			
National	15%	22%	15%
European non-national	14%	11%	6%
Sub-total: European	29%	33%	21%
USA	61%	55%	65%
Others	10%	12%	14%

- The promotion of European films varied not only by country but also between players. In France or in Germany, National VOD players tended globally to dedicate more promotional spots to European films, but differences were significant when looking at US players: ITunes and, to a lesser extent Amazon Instant video, tended to propose more European works than PS Store, Xbox Live and Google Play.
- In the UK, all players allocated less than 30% of promotional spots to European films; among US players, Google Play or PS Store were among the players with less European content promoted.

Table 1: Share of promotional spots allocated to European films by on-demand services

Share of spots allocated to European films	DE	FR	UK
Over 40%	Videobuster	Pluzz Itunes Orange	
From 30% to 40%	Videociety Videoload Amazon Instant Video	Canal Play SFR	
From 20% to 30%	Sky Itunes Maxdome Unity Media	MyTF1 VOD Sony PS	Xbox Live BT Box Office Itunes Amazon Instant Video Virgin Media
From 10% to 20%	Google Play PS Store	Xbox Live Google Play	Sky Google Play
Under 10%			PS Store

3 Analysis of films promoted by German on-demand services

3.1 Diversity of films promoted

In October 2015, **8316** promotional spots were used by the German on-demand services to promote **348** different films.

The number of available promotional spots differed quite widely between services, and so did the number of different films promoted.

To measure the diversity of the films promoted, we use the ratio between the number of available promotional spots and the number of different titles promoted. This ratio varied from **5.6 to 12.8** between services, which reflects to which extent some services tend to focus their promotional efforts on a limited number of best-sellers, whereas others push forward a wider selection of films. When looking at the consolidated picture of all German on-demand services, the diversity of the offer is even lower, as a large proportion of the films are duplicated between the services. In any case, it should be reminded that an on-demand service can propose as much as 5 000 different films at one given moment and that, therefore, the proportion of films promoted among the catalogues can be way under 10%.

Films are of course promoted by services **with a different intensity**, in terms of number of days, of number of promotional spots etc. At the consolidated German level, **the 10 most promoted films** (out of the total promoted films of 348) gathered **37% of all the promotional spots.** For certain services, the share of promotional spots allocated to the 10 most promoted films was as high as 74%.

Table 4 Promotional spots and promoted films in Germany

Service	Number of promotional spots	Number of unique titles promoted	Diversity of promoted films[4]	Number of promotional spots for the 10 most promoted films	Share of promotional spots for the most promoted films
Amazon Instant Video	961	103	10,7	446	46%
Google Play	824	60	7,3	450	55%
iTunes	933	119	12,8	348	37%
Maxdome	652	38	5,8	481	74%
PS Store	461	26	5,6	316	69%
Sky	749	62	8,3	273	36%
Unity Media	1126	85	7,5	460	41%
Videobuster	730	56	7,7	315	43%
Videociety	666	82	12,3	268	40%
Videoload	1214	122	10,0	504	42%
All DE	**8316**	**348**[5]	**4,2**[6]	**3039**	**37%**

The following table focuses on the promotion of **recent films** (produced in 2014 or 2015) by German on-demand services.

At the consolidated German level **226 films (65%)** out of the total 348 which were promoted were recent films. These films benefited from a much more intense promotion effort, as **86% of all promotional spots dedicated to films were allocated to them**. Certain services gave even a higher priority to recent films, both in terms of the share of recent films among the films promoted (up to 97%) and of share of promotional spots allocated to recent films (up to 99%).

[4] Number of films promoted per 100 available promotional spots

[5] The total number of films promoted is not the sum of the number of films promoted by each service as many films are duplicated between the different services.

[6] The consolidated ratio is lower as many films are duplicated between the different services.

Table 5 Promotional spots and promoted recent films in Germany

Service	Number of pro-motional spots	Number of pro-motional spots allocated to 2014-2015 films	Number of unique titles 2014-2015	Diversity of promoted films[7]	Diversity of 2014-2015 promoted films[8]
Amazon Instant Video	961	797	69	10,7	8,7
Google Play	824	777	52	7,3	6,7
iTunes	933	823	96	12,8	11,7
Maxdome	652	648	37	5,8	5,7
PS Store	461	328	19	5,6	5,8
Sky	749	550	48	8,3	8,7
Unity Media	1126	829	54	7,5	6,5
Videobuster	730	644	44	7,7	6,8
Videociety	666	640	73	12,3	11,4
Videoload	1214	1128	109	10,0	9,7
All DE	**8316**	**7164**	**226**[9]	**4,2**[10]	**3,2**[11]

[7] Number of films promoted per 100 available promotional spots

[8] Number of 2014-2015 films promoted per 100 available promotional spots

[9] The total number of films promoted is not the sum of the number of films promoted by each service as many films are duplicated between the different services.

[10] The consolidated ratio is lower as many films are duplicated between the different services.

[11] The consolidated ratio is lower as many films are duplicated between the different services.

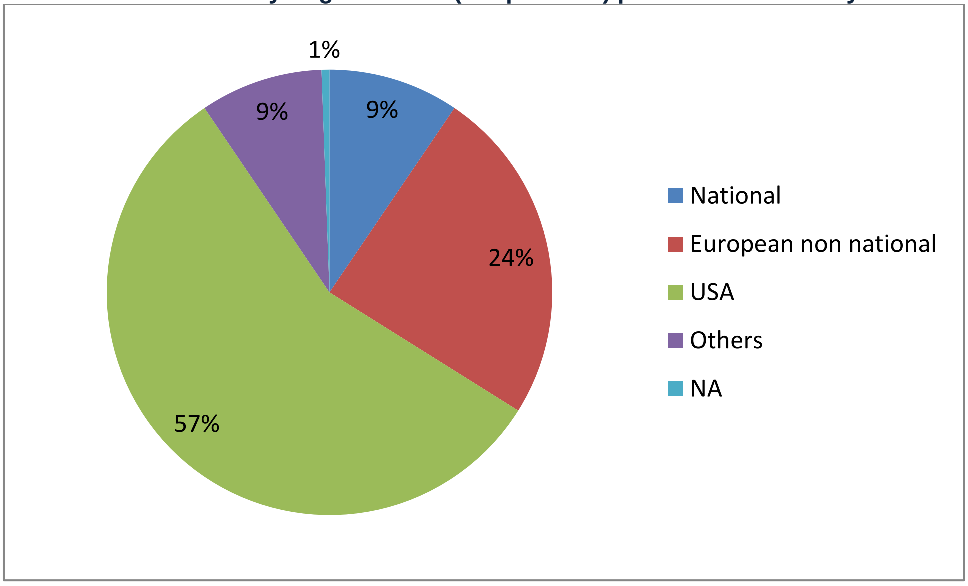
3.2 The promotion of European films

The following table analyses the films promoted by German on-demand services, **regardless of the intensity of the promotion.** At the consolidated German level, **European films accounted for 33% of all promoted films**. Among European films, **national films were less represented (9%) than European non-national films (24%)**.

Table 6 Origin of films (unique titles) promoted by German on-demand services

Service	Number of unique titles	*National*	*European non national*	*USA*	*Others*	*NA*
Amazon Instant Video	103	*14*	*24*	*52*	*11*	*2*
Google Play	60	*10*	*5*	*37*	*8*	*0*
iTunes	119	*16*	*25*	*71*	*7*	*0*
Maxdome	38	*5*	*5*	*26*	*2*	*0*
PS Store	26	*4*	*4*	*15*	*3*	*0*
Sky	62	*7*	*11*	*42*	*2*	*0*
Unity Media	85	*8*	*14*	*57*	*6*	*0*
Videobuster	56	*8*	*24*	*18*	*6*	*0*
Videociety	82	*9*	*17*	*46*	*10*	*0*
Videoload	122	*20*	*27*	*61*	*14*	*0*
Total	348[12]	*33*	*85*	*197*	*31*	*2*

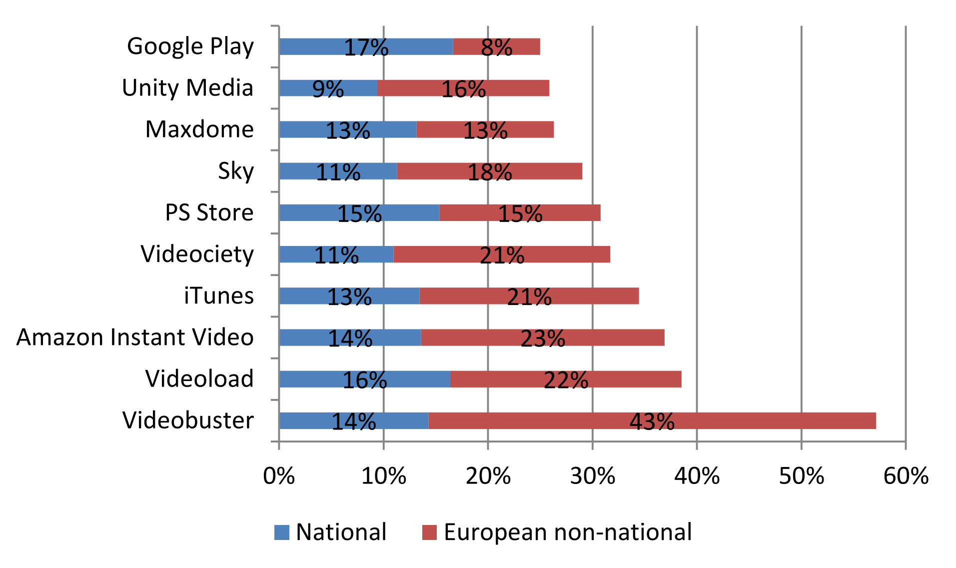
Table 7 Breakdown by origin of films (unique titles) promoted – Germany consolidated



[12] The total number of films promoted is not the sum of the number of films promoted by each service as many films are duplicated between the different services.

The proportion of European films varied from **25% to 57%** between the services.

Figure 1 Share of European works among films (unique titles) promoted by German services



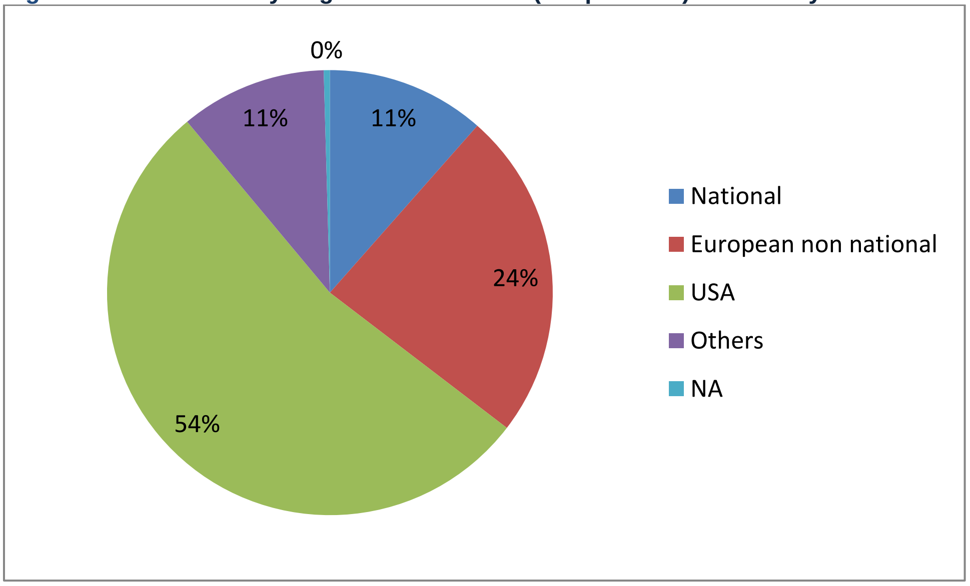
The proportion of European films was similar (35%) **when looking only at recent films (produced in 2014 or 2015)**, with significant differences between services (from 26% to 50%). Here again, the share of European non-national films (24%) seemed significant.

Table 8 Origin of recent films (unique titles) promoted by German on-demand services

	Number of unique titles 2014-2015	*National*	*European non national*	*USA*	*Others*	*NA*
Amazon Instant Video	69	*10*	*18*	*33*	*7*	*1*
Google Play	52	*10*	*5*	*31*	*6*	*0*
iTunes	96	*15*	*21*	*54*	*6*	*0*
Maxdome	37	*5*	*5*	*25*	*2*	*0*
PS Store	19	*4*	*1*	*11*	*3*	*0*
Sky	48	*6*	*7*	*33*	*2*	*0*
Unity Media	54	*6*	*10*	*33*	*5*	*0*
Videobuster	44	*8*	*14*	*17*	*5*	*0*
Videociety	73	*9*	*17*	*39*	*8*	*0*
Videoload	109	*17*	*25*	*54*	*13*	*0*
All DE	226[13]	*26*	*54*	*121*	*24*	*1*

[13] The total number of films promoted is not the sum of the number of films promoted by each service as many films are duplicated between the different services.

Figure 2 Breakdown by origin of recent films (unique titles) – Germany consolidated

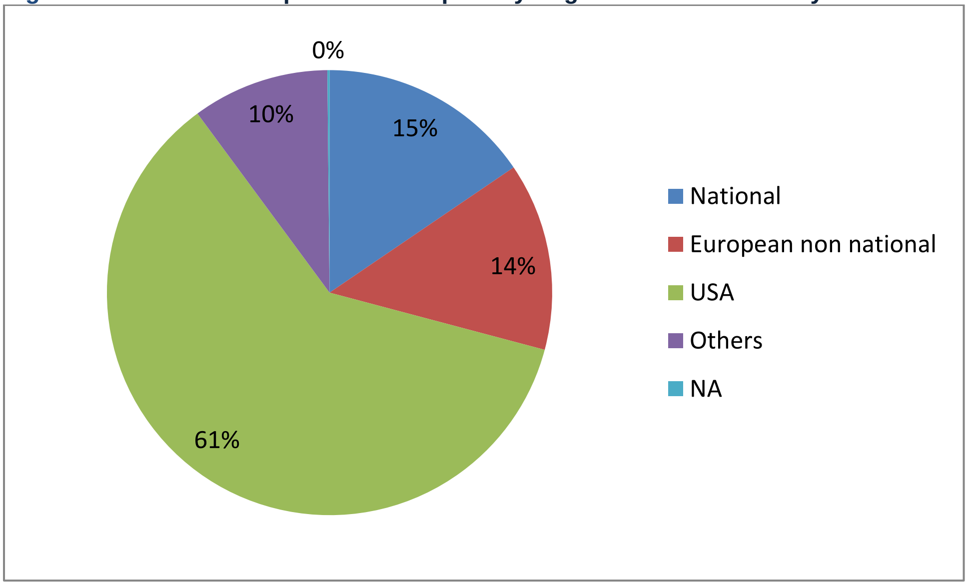


All films do not benefit from the same promotion effort. Whereas **European films accounted for 33% of all films promoted, they were allocated a slightly lower fraction (29%) of promotional spots.**

Table 9 Promotional spots by origin of films on German on-demand services

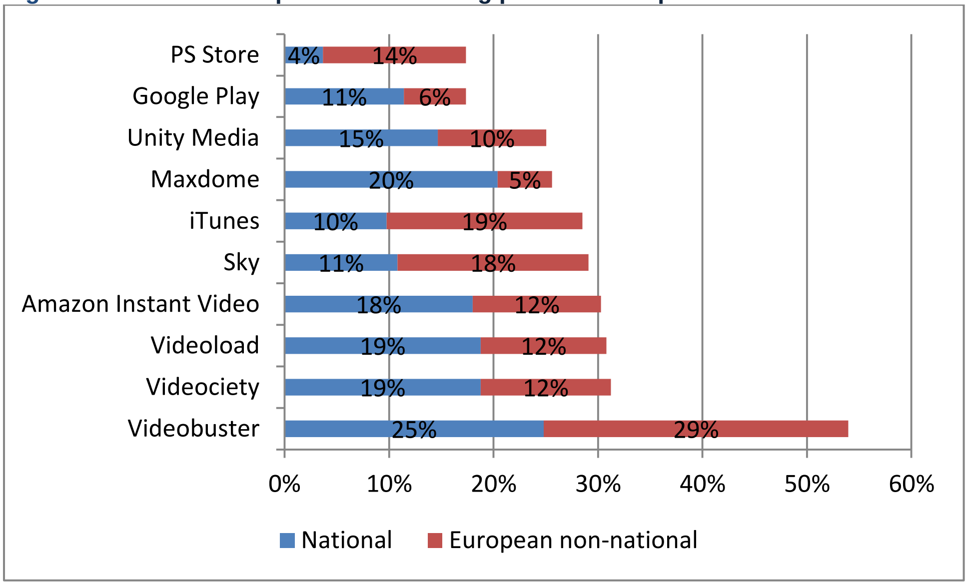
	Spots by country of origin				
Service	National	European non national	USA	Others	NA
Amazon Instant Video	173	118	534	123	13
Google Play	94	49	579	102	0
iTunes	91	175	607	60	0
Maxdome	133	34	404	81	0
PS Store	17	63	316	65	0
Sky	81	137	505	26	0
Unity Media	165	117	731	113	0
Videobuster	181	213	271	65	0
Videociety	125	83	398	60	0
Videoload	228	146	707	133	0
Total	1288	1135	5052	828	13

Figure 3 Breakdown of promotional spots by origin of films – Germany consolidated



The proportion of promotional spots allocated to European films varied between **18% and 54%.**

Figure 4 Share of European works among promotional spots of German services



As regards more specifically **the recent films** (produced in 2014 and 2015), the **share of promotional spots (28%) was again slightly lower than the share of European films (35%)**.

Table 10 Promotional spots by origin of recent films on German on-demand services

	Spots by country of origin (films produced in 2014 and 2015)				
Service	National	European non national	USA	Others	NA
Amazon Instant Video	145	87	452	104	9
Google Play	94	49	542	92	0
iTunes	90	147	533	53	0
Maxdome	133	34	400	81	0
PS Store	17	7	239	65	0
Sky	56	77	391	26	0
Unity Media	104	88	533	104	0
Videobuster	181	131	270	62	0
Videociety	125	83	374	58	0
Videoload	210	143	644	131	0
All DE	1155	846	4378	776	9

4 Analysis of films promoted by French on-demand services

4.1 Diversity of films promoted

In October 2015, **6671** promotional spots were used by the on-demand services part of the France sample to promote **221** different films.

The number of available promotional spots differed quite widely between services, and so did the number of different films promoted.

To measure the diversity of the films promoted, we use the ratio between the number of available promotional spots and the number of different titles promoted. This ratio varies from **4.2 to 13.4** between services, which reflects to which extent some services tend to focus their promotional efforts on a limited number of best-sellers, whereas others push forward a wider selection of films. When looking at the consolidated picture of all French on-demand services, the diversity of the offer is even lower, as a large proportion of the films are duplicated between the services. In any case, it should be reminded that an on-demand service can propose as much as 5 000 different films at one given moment and that, therefore, the proportion of films promoted among the catalogues can be way under 10%.

Films are of course promoted by services **with a different intensity**, in terms of number of days, of number of promotional spots etc. At the consolidated French level, **the 10 most promoted films** (out of the total promoted films of 221) gathered **43% of all the promotional spots.** In certain services, the share of promotional spots allocated to the 10 most promoted films was as high as 78%.

Table 11 Promotional spots and promoted films in France

Service	Number of promotional spots	Number of unique titles promoted	Diversity of promoted films[14]	Number of promotional spots for the 10 most promoted films	Share of promotional spots for the 10 most promoted films
Canal Play	674	34	5,0	410	61%
Google Play	590	30	5,1	459	78%
iTunes	1117	112	10,0	427	38%
MyTF1VOD	936	49	5,2	667	71%
Orange	700	46	6,6	348	50%
Pluzz	578	30	5,2	380	66%
SFR	729	98	13,4	302	41%
Sony PS	737	31	4,2	428	58%
XBOX Live	610	47	7,7	371	61%
All FR	**6671**	**221**[15]	**3,3**[16]	**2879**	**43%**

[14] Number of films promoted per 100 available promotional spots

[15] The total number of films promoted by French service is not the sum of the number of films promoted by each service as many films are duplicated between the different services.

[16] The ratio is lower for the consolidated French figures as many films are duplicated between the different services.

The following table focuses on the promotion of recent films (produced in 2014 or 2015) by on-demand services part of the French sample.

At the consolidated French level **156 films (71%)** out of the total 221 which were promoted were recent films. These films benefited from a much more intense promotion effort, as **92% of all promotional spots dedicated to films were allocated to them**. Certain services gave even a higher priority to recent films, both in terms of the share of recent films among the films promoted (up to 100%) and of share of promotional spots allocated to recent films (up to 100%).

Table 12 Promotional spots and promoted recent films in France

Service	Number of promotional spots	Number of promotional spots allocated to 2014-2015 films	Number of unique titles 2014-2015	Diversity of promoted films[17]	Diversity of 2014-2015 promoted films[18]
Canal Play	674	637	32	5,0	5,0
Google Play	590	576	29	5,1	5,0
iTunes	1117	989	87	10,0	8,8
MyTF1VOD	936	925	46	5,2	5,0
Orange	700	682	44	6,6	6,5
Pluzz	578	460	25	5,2	5,4
SFR	729	593	61	13,4	10,3
Sony PS	737	737	31	4,2	4,2
XBOX Live	610	563	42	7,7	7,5
All FR	**6671**	**6162**	**156**[19]	**3,3**[20]	**2,5**[21]

[17] Number of films promoted per 100 available promotional spots

[18] Number of 2014-2015 films promoted per 100 available promotional spots

[19] The total number of films promoted is not the sum of the number of films promoted by each service as many films are duplicated between the different services.

[20] The consolidated ratio is lower as many films are duplicated between the different services.

[21] The consolidated ratio is lower as many films are duplicated between the different services.

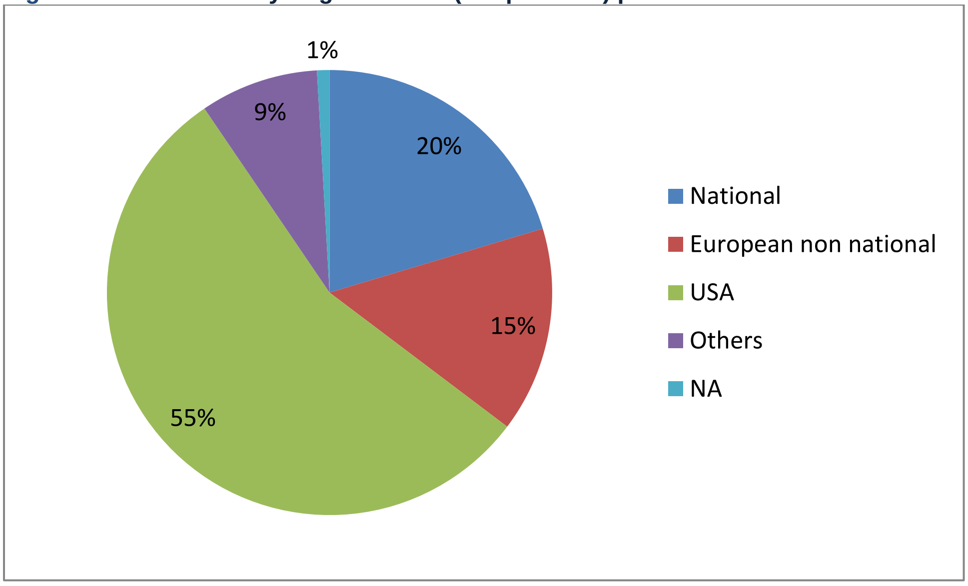
4.2 The promotion of European films

The following table analyses the films promoted by French on-demand services, **regardless of the intensity of the promotion.** At the consolidated French level, **European films accounted for 35% of all promoted films**. **Among European films, national films were more represented (20%) than European non-national films (15%).**

Table 13 Origin of films (unique titles) promoted by French on-demand services

Service	Number of unique titles	*National*	*European non national*	*USA*	*Others*	*NA*
Canal Play	34	*10*	*2*	*18*	*4*	*0*
Google Play	30	*3*	*6*	*18*	*3*	*0*
iTunes	112	*25*	*21*	*52*	*12*	*2*
MyTF1VOD	49	*13*	*7*	*25*	*4*	*0*
Orange	46	*13*	*7*	*24*	*2*	*0*
Pluzz	30	*13*	*5*	*9*	*3*	*0*
SFR	98	*19*	*17*	*59*	*3*	*0*
Sony PS	31	*6*	*3*	*21*	*1*	*0*
XBOX Live	47	*5*	*3*	*33*	*6*	*0*
All FR	221[22]	*45*	*33*	*122*	*19*	*2*

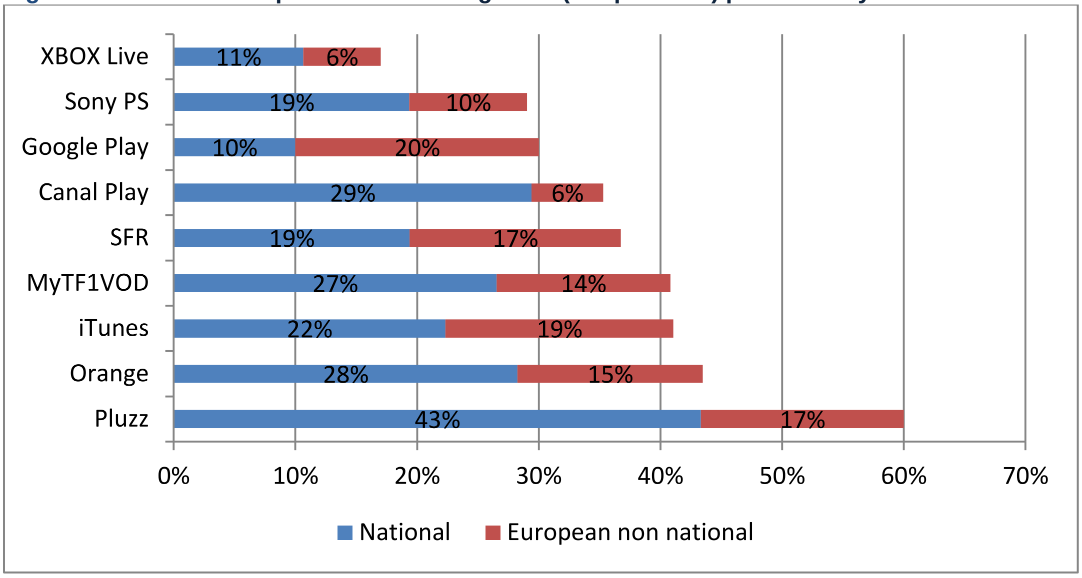
Figure 5 Breakdown by origin of films (unique titles) promoted– France consolidated



[22] The total number of films promoted is not the sum of the number of films promoted by each service as many films are duplicated between the different services.

The proportion of European films varied from**17% to 60%** between the services.

Figure 6 Share of European works among films (unique titles) promoted by French services



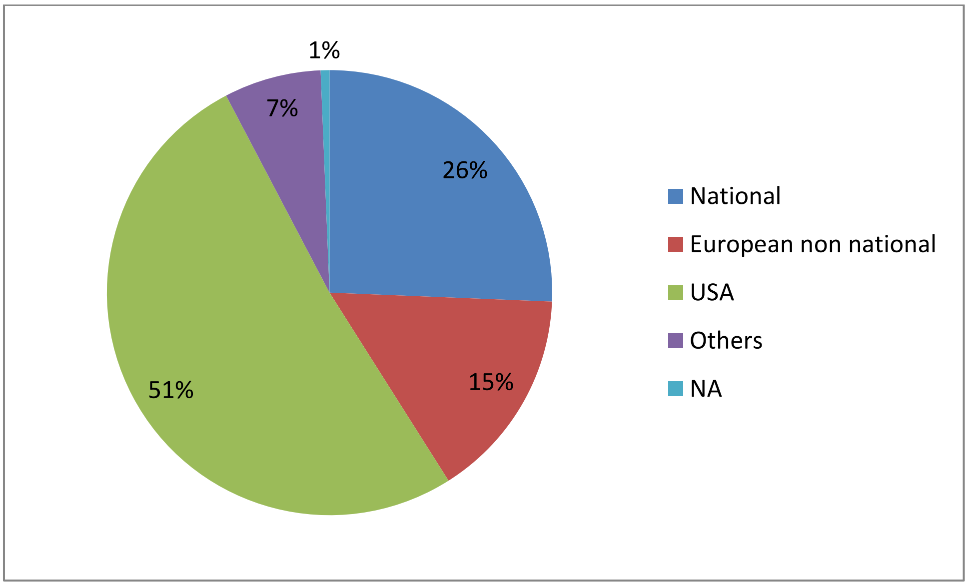
The proportion of European films is higher (41%) **when looking only at recent films (produced in 2014 or 2015)**, with significant differences between services (from 19% to 68%). Here again, among European films, national films were more represented (26%) than European non-national films (15%).

Table 14 Origin of recent films (unique titles) promoted by French on-demand services

	Number of unique titles 2014-2015	*National*	*European non na-tional*	*USA*	*Others*	NA
Canal Play	32	*10*	*2*	*17*	*3*	0
Google Play	29	*3*	*6*	*17*	*3*	0
iTunes	87	*24*	*15*	*39*	*8*	1
MyTF1VOD	46	*13*	*6*	*24*	*3*	0
Orange	44	*13*	*7*	*22*	*2*	0
Pluzz	25	*13*	*4*	*6*	*2*	0
SFR	61	*15*	*13*	*32*	*1*	0
Sony PS	31	*6*	*3*	*21*	*1*	0
XBOX Live	42	*5*	*3*	*31*	*3*	0
All FR	156[23]	*40*	*24*	*80*	*11*	1

Figure 7 Breakdown by origin of recent films (unique titles) – France consolidated

[23] The total number of films promoted is not the sum of the number of films promoted by each service as many films are duplicated between the different services.

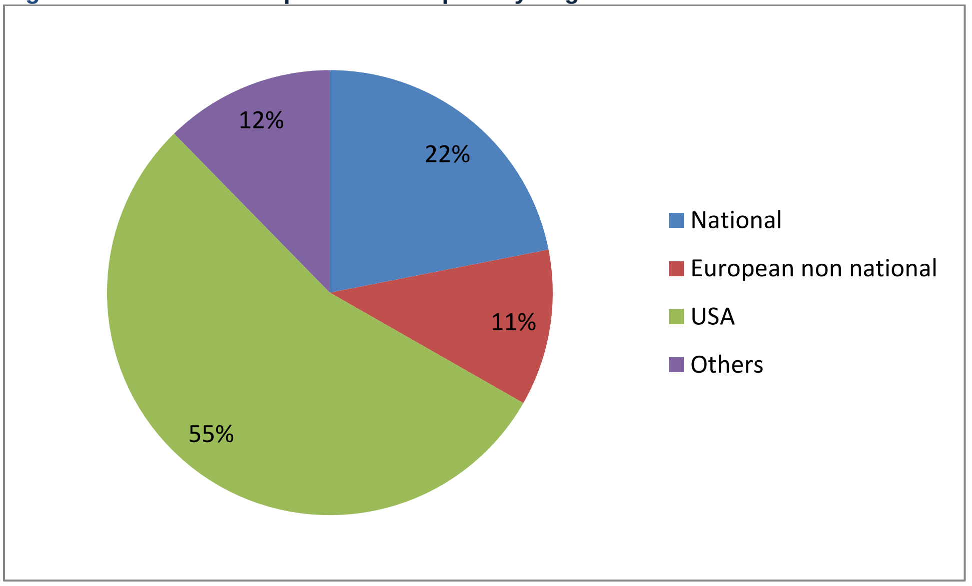


All films do not benefit from the same promotion effort. Whereas **European films accounted for 35% of all films promoted, they were allocated a slightly lower fraction (34%) of promotional spots.**

Table 15 Promotional spots by origin of films on French on-demand services

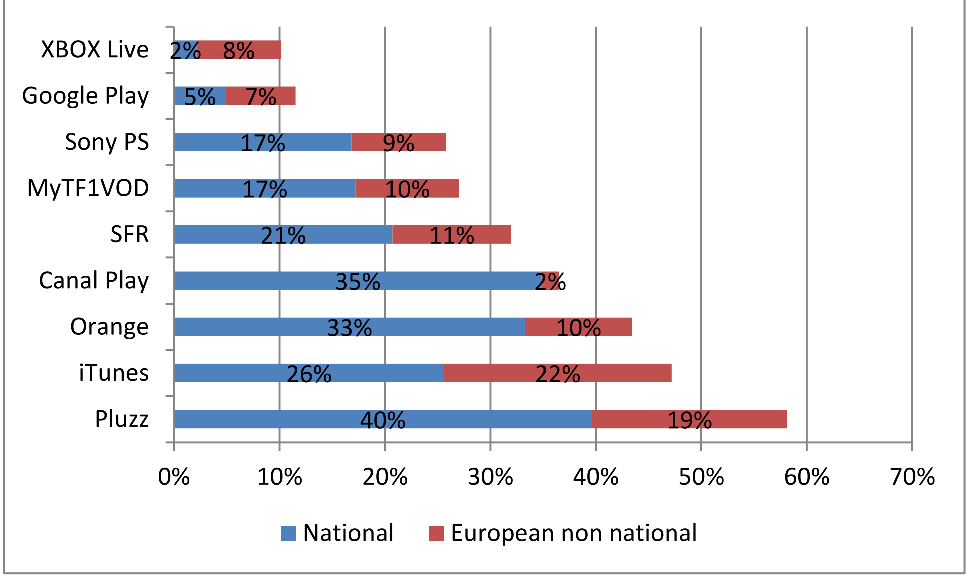
	Spots by country of origin			
Service	National	European non national	USA	Others
Canal Play	235	11	376	52
Google Play	29	39	448	74
iTunes	286	241	443	147
MyTF1VOD	161	92	481	202
Orange	233	71	351	45
Pluzz	229	107	138	104
SFR	151	82	474	22
Sony PS	124	66	482	65
XBOX Live	13	49	437	111
All FR	1461	758	3630	822

Figure 8 Breakdown of promotional spots by origin of films – France consolidated



The proportion of promotional spots allocated to European films varied between **10% and 59%.**

Figure 9 Share of European works among promotional spots of French services



As regards more specifically the **recent films** (produced in 2014 and 2015), **the share of promotional spots (35%) was lower than the share of European films (41%).**

Table 16 Promotional spots by origin of recent films on French on-demand services

	Spots by country of origin (films produced in 2014 and 2015)			
Service	National	European non national	USA	Others
Canal Play	235	11	363	28
Google Play	29	39	434	74
iTunes	284	204	371	130
MyTF1VOD	161	91	476	197
Orange	233	71	333	45
Pluzz	229	81	63	87
SFR	147	72	358	16
Sony PS	124	66	482	65
XBOX Live	13	49	414	87
All FR	1455	684	3294	729

5 Analysis of films promoted by British on-demand services

5.1 Diversity of films promoted

In October 2015, **10024** promotional spots were used by the on-demand services part of the Germany sample to promote **287** different films.

The number of available promotional spots differed quite widely between services, and so did the number of different films promoted.

To measure the diversity of the films promoted, we use the ratio between the number of available promotional spots and the number of different titles promoted. This ratio varies from **2.9 to 9.2** between UK services, which reflects to which extent some services tend to focus their promotional efforts on a limited number of best-sellers, whereas others push forward a wider selection of films. When looking at the consolidated picture of all UK on-demand services, the diversity of the offer is even lower, as a large proportion of the films are duplicated between the services. In any case, it should be reminded that an on-demand service can propose as much as 5 000 different films at one given moment and that, therefore, the proportion of films promoted among the catalogues can be way under 10%.

Films are of course promoted by services with a different intensity, in terms of number of days, of number of promotional spots etc. At the consolidated UK level, **the 10 most promoted films** (out of the total promoted films of 287) gathered **40% of all the promotional spots.** In certain services, the share of promotional spots allocated to the 10 most promoted films was as high as 75%.

Table 17 Promotional spots and promoted films in the UK

Service	Number of promotional spots	Number of unique titles promoted	Diversity of promoted films[24]	Number of promotional spots for the 10 most promoted films	Share of promotional spots for the 10 most promoted films
Amazon Instant Video	961	55	5,7	466	48%
BT Box Office	1151	67	5,8	530	46%
Google Play	637	41	6,4	475	75%
Itunes	1685	155	9,2	498	30%
PS Store	590	29	4,9	317	54%
Sky	1695	50	2,9	149	9%
Virgin Media	1846	140	7,6	633	34%
XBoxLive	1461	78	5,3	614	42%
All UK	**10024**	**287**[25]	**2,9**[26]	**4037**	**40%**

[24] Number of films promoted per 100 available promotional spots

[25] The total number of films promoted by German service is not the sum of the number of films promoted by each service as many films are duplicated between the different services.

[26] The ratio is lower for the consolidated figures as many films are duplicated between the different services.

The following tables focuses on the promotion of recent films (produced in 204 or 2015) by on-demand services part of the UK sample.

At the consolidated level **231 films (80%)** out of the total 287 which were promoted were recent films. These films benefited from a much more intense promotion effort, **as 96% of all promotional spots dedicated to films were allocated to them.** Certain services gave even a higher priority to recent films, both in terms of the share of recent films among the films promoted (up to 97%) and of share of promotional spots allocated to recent films (up to 100%).

Table 18 Promotional spots and promoted recent films in the UK

Service	Number of promotional spots	Number of promotional spots allocated to 2014-2015 films	Number of unique titles 2014-2015	Diversity of promoted films[27]	Diversity of 2014-2015 promoted films[28]
Amazon Instant Video	961	930	54	5,7	5.8
BT Box Office	1151	1089	60	5,8	5,5
Google Play	637	626	38	6,4	6,1
Itunes	1685	1587	137	9,2	8,6
PS Store	590	590	29	4,9	4,9
Sky	1695	1651	44	2,9	2,7
Virgin Media	1846	1775	122	7,6	6,9
XBoxLive	1461	1358	66	5,3	4,9
All UK	**10024**	**9606**	**231**[29]	**2,9**[30]	**2,4**[31]

5.2 The promotion of European films

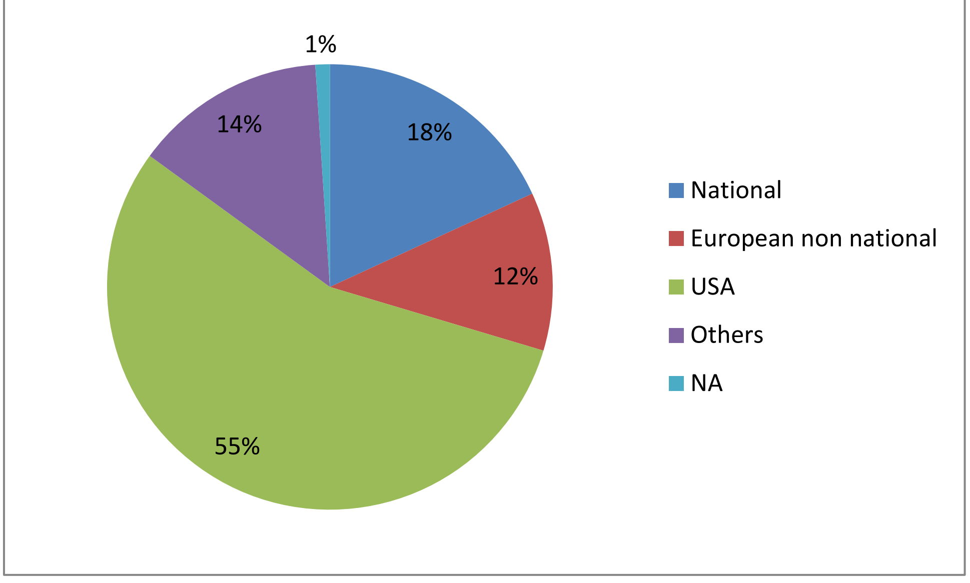
The following table analyses the films promoted by UK on-demand services, **regardless of the intensity of the promotion**. At the consolidated UK level, **European films accounted for 30% of all promoted films**. This proportion varied from 3% to 31% between the services[32]. **Among European films, national films were more represented (18%) than European non-national films (12%).**

[27] Number of films promoted per 100 available promotional spots
[28] Number of 2014-2015 films promoted per 100 available promotional spots
[29] The total number of films promoted is not the sum of the number of films promoted by each service as many films are duplicated between the different services.
[30] The consolidated ratio is lower as many films are duplicated between the different services.
[31] The consolidated ratio is lower as many films are duplicated between the different services.
[32] The ratio for the consolidated UK is not the average of the ratio of each individual service as films are duplicated between services.

Table 19 Origin of films (unique titles) promoted by UK on-demand services

Service	Number of unique titles	*National*	*European non national*	*USA*	*Others*	NA
Amazon Instant Video	55	*13*	*4*	*33*	*4*	1
BT Box Office	67	*11*	*10*	*40*	*6*	0
Google Play	41	*6*	*2*	*28*	*5*	0
Itunes	155	*24*	*17*	*89*	*23*	2
PS Store	29	*1*	*0*	*25*	*3*	0
Sky	50	*8*	*3*	*33*	*6*	0
Virgin Media	140	*26*	*14*	*79*	*20*	1
XBoxLive	78	*12*	*10*	*47*	*9*	0
All UK	**287**[33]	***52***	***33***	***159***	***40***	**3**

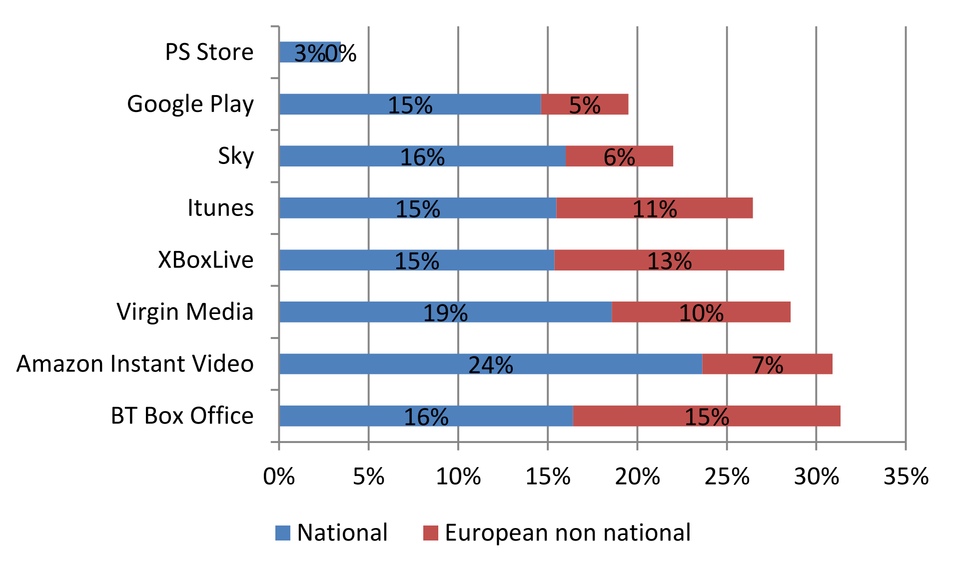
Figure 10 Breakdown by origin of films (unique titles) promoted– UK consolidated



The proportion of European films varied from **3% to 31%** between the services.

[33] The total number of films promoted is not the sum of the number of films promoted by each service as many films are duplicated between the different services.

Figure 11 Share of European works among films (unique titles) promoted by UK services



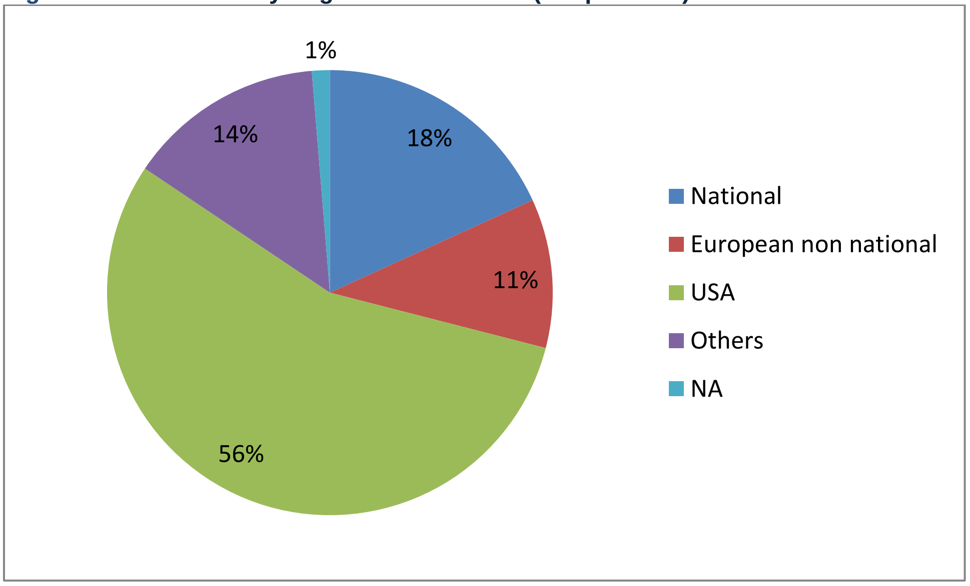
The proportion of European films is similar (29%) **when looking only at recent films (produced in 2014 or 2015),** with here again significant differences between services (from 3% to 32%). Here again, national films were more represented (18%) than European non-national films (11%).

Table 20 Origin of recent films (unique titles) promoted by UK on-demand services

	Number of unique titles 2014-2015	*National*	*European non national*	*USA*	*Others*	*NA*
Amazon Instant Video	54	*13*	*4*	*33*	*4*	*0*
BT Box Office	60	*10*	*9*	*35*	*6*	*0*
Google Play	38	*6*	*2*	*25*	*5*	*0*
Itunes	137	*20*	*14*	*81*	*20*	*2*
PS Store	29	*1*	*0*	*25*	*3*	*0*
Sky	44	*6*	*3*	*29*	*6*	*0*
Virgin Media	122	*25*	*13*	*67*	*16*	*1*
XBoxLive	66	*10*	*7*	*42*	*7*	*0*
All UK	**231**[34]	***42***	***25***	***128***	***33***	***3***

[34] The total number of films promoted is not the sum of the number of films promoted by each service as many films are duplicated between the different services.

Figure 12 Breakdown by origin of recent films (unique titles) – UK consolidated

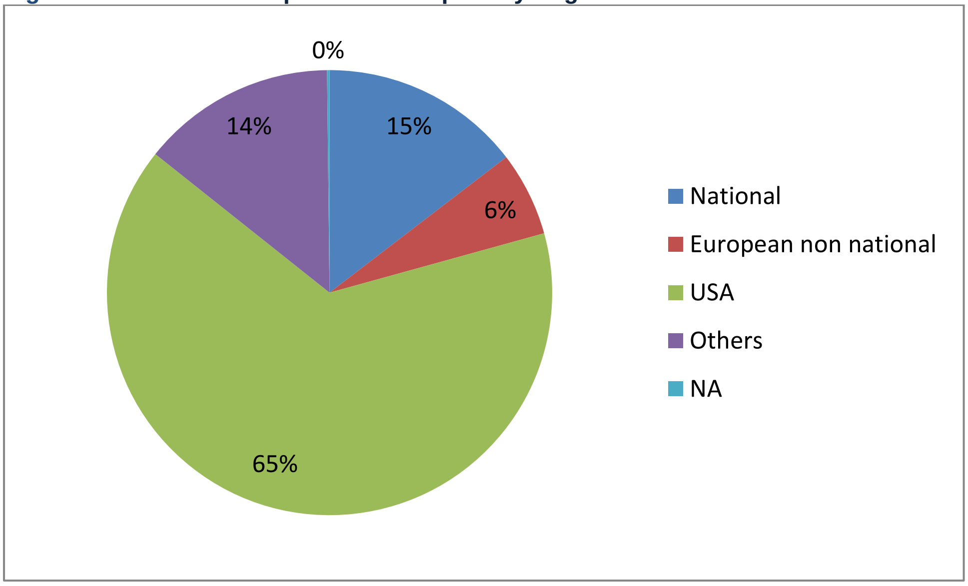


All films do not benefit from the same promotion effort. Whereas **European films accounted for 30% of all films promoted, they were allocated a significantly lower fraction (21%) of promotional spots.**

Table 21 Promotional spots by origin of films on UK on-demand services

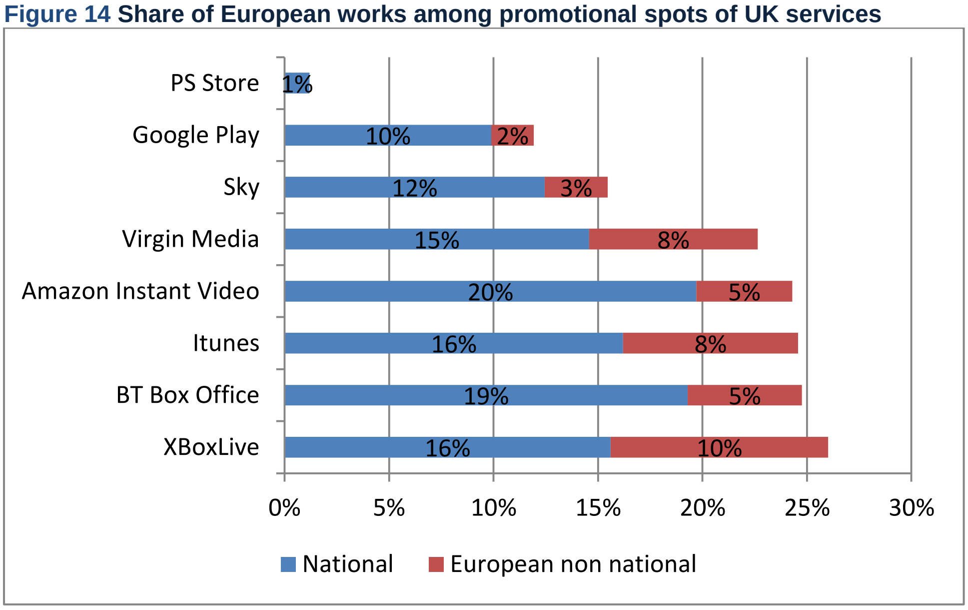
	Spots by country of origin				
Service	National	European non national	USA	Others	NA
Amazon Instant Video	189	44	603	123	
BT Box Office	222	63	722	144	
Google Play	63	13	428	133	
Itunes	273	141	1016	244	11
PS Store	7	0	509	74	
Sky	211	51	1126	307	
Virgin Media	269	149	1214	207	7
XBoxLive	228	152	897	184	0
All UK	1462	613	6515	1416	18

Figure 13 Breakdown of promotional spots by origin of films – UK consolidated



The proportion of promotional spots allocated to European films varied between **1% and 26%.**

Figure 14 Share of European works among promotional spots of UK services



As regards more specifically the **recent films** (produced in 2014 and 2015), **the share of promotional spots (21%) was again slightly lower than the share of European films (29%).**

Table 22 Promotional spots by origin of recent films on UK on-demand services

	Spots by country of origin (films produced in 2014 and 2015)				
Service	National	European non national	USA	Others	NA
Amazon Instant Video	145	87	452	104	9
Google Play	94	49	542	92	0
iTunes	90	147	533	53	0
Maxdome	133	34	400	81	0
PS Store	17	7	239	65	0
Sky	56	77	391	26	0
Unity Media	104	88	533	104	0
Videobuster	181	131	270	62	0
Videociety	125	83	374	58	0
Videoload	210	143	644	131	0
All DE	1155	846	4378	776	9

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