

# The visibility of audiovisual works on TVOD

## 2021 Edition

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# Introduction and methodology

# Introduction and methodology

**This report is the 7th edition of the analysis of the visibility of audiovisual content on transactional on-demand (TVOD) services.**

## The data

- ▶ The underlying data used in this report has been provided by AQOA. AQOA systematically monitors the promotional spots on the homepage of the services, identifies the programme and associated metadata.
- ▶ The data provided by AQOA:
  - Covers 8 EU27 countries (Belgium, Germany, France, Italy, the Netherland, Poland, Spain, and Sweden) and the United Kingdom. A further distinction is made between the services addressing the French-speaking (BEFR in the report) and the Flemish-speaking (BENL in the report) communities of Belgium.
  - Includes 54 TVOD services.
  - Covers a full month of promotion by the TVOD services (October 2021).

# Introduction and methodology

## Definitions

- ▶ In this report, “**visibility**” means the mention of a content in the home page of a service.
- ▶ A promotion spot is any space dedicated to the promotion of a content on the home page of a service.
- ▶ “Films” in this report can be either :
  - “**Theatrical films**”, if they have been released in cinemas in the TVOD service country.
  - “**Direct-to-VOD films**”, if they have not been released in cinemas in the TVOD service country. .
- ▶ All other content is defined as “TV content”.
- ▶ Please note that in some cases it is uneasy to assess whether a programme is a film or a TV film.
- ▶ The country of origin of a programme is the country from which originates the funding of a programme. When the programme has been funded by several countries, the country of origin is the country providing the highest share of the funding.
- ▶ A distinction is made throughout this report between:
  - the analysis by **titles**: each title (film or TV content) promoted at least once is accounted for one, without taking into account the number of promotion spots. This approach is used to assess the number (and origin) of films which benefit from any level of promotion.;
  - the analysis by **promotion spots**: the number of promotion spots for each film is here taken into account. This approach is used to assess the volume of promotion which is attributed to films and TV content according to their origin.

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## Key findings

# Key findings

## The analysis of the visibility of films and TV content highlights the very characteristics of transactional video on demand services (TVOD)

- ▶ TVOD's business model primarily relies on the sale or purchase of a limited number of recent high-commercial potential films. These high-commercial potential films are supplemented by a “long tail” offer of older films and TV shows, hardly promoted.
- ▶ High-potential films are “pushed” towards consumers through intensive promotion, whereas other programmes are made available for consumers which are looking for specific titles.

## Access to visibility on TVOD is a very selective process

- ▶ Only a very small share of the catalogue (about 1% of titles) are promoted each month. And promotion is not distributed evenly between the titles who access promotion: out of about 2 100 films which were promoted in October 2021, the 10 most promoted ones captured about 37% of all promotion efforts.

## TVOD services dedicate the bulk of promotion to recent films

- ▶ 97% of promotion spots are dedicated to films, vs. only 3% for TV content, mainly TV series.
- ▶ 70% of film promotion spots go to recent films (produced in 2020 and 2021).

## Different types of films

- ▶ Films theatrically released in the country are the prime source for films (85%). The catalogue is complemented by “direct-to-VOD” films, i.e. films with no theatrical release the country (15%).

## No significant gap between the share of European works in catalogues and their share of promotion

- ▶ A relatively high share of EU27 or other European works access promotion (27% for EU27 works and 41% for all European works). But each EU27 or other European work is, on average, promoted less intensively than a US film.
- ▶ Therefore, European works account for 32% of promotion works, including 18% for EU27 works.
- ▶ Among the 54 TVOD services in the sample, 25 had a share of promotion spots dedicated to European films above the 30% threshold.
- ▶ In all countries but United Kingdom and France, the majority of European works promotion spots goes to non-national titles.

## However, the promotion of European films is highly concentrated

- ▶ Whereas the top 10 most promoted films account for, on average, for 37% of all promotion spots dedicated to films, the top 10 most promoted European films account for 69% of all promotion spots dedicated to European films.

## But significant differences between category of players

- ▶ On average, TVOD services with a multi-country presence tend to promote a lesser share of EU27 and European films (13% and 26%, respectively) than national services (22% and 37%, respectively).
- ▶ And the promotion of European films is even more concentrated among TVOD services with a multi-country presence : the top 10 most promoted European films account for 77% of all promotion spots dedicated to European films.

## Figures suggest than the share of promotion captured by European works is increasing

- ▶ Despite changes in the sample, figures suggest that the share of promotion spots dedicated to European works has increased from 23% in 2017 to 32% in 2021.

**How is the content promoted?**

# How is the content promoted?

There are many different lay-outs of the home pages of the TVOD services, based on marketing options and technical constraints

- ▶ Generally speaking, the home page combines a general “welcome” section on the top of the page, and specific **sections**, organized under different concepts:
  - Highlights
  - Collections
  - Most popular
  - Genre (TV/Cinema)
  - Exclusivities
  - New releases
  - Special deals
  - Pre-order
  - Etc.

Sections may be dedicated to personalized recommendations based on consumption history. They are not taken into account in this report.

- ▶ Each section can be static or can be scrolled horizontally .
- ▶ Titles promoted can be changed on a daily basis.
- ▶ On average, about 2% of the spots are used for “operations”, i.e. the promotion of a package of titles. The remaining spots are dedicated to individual titles.

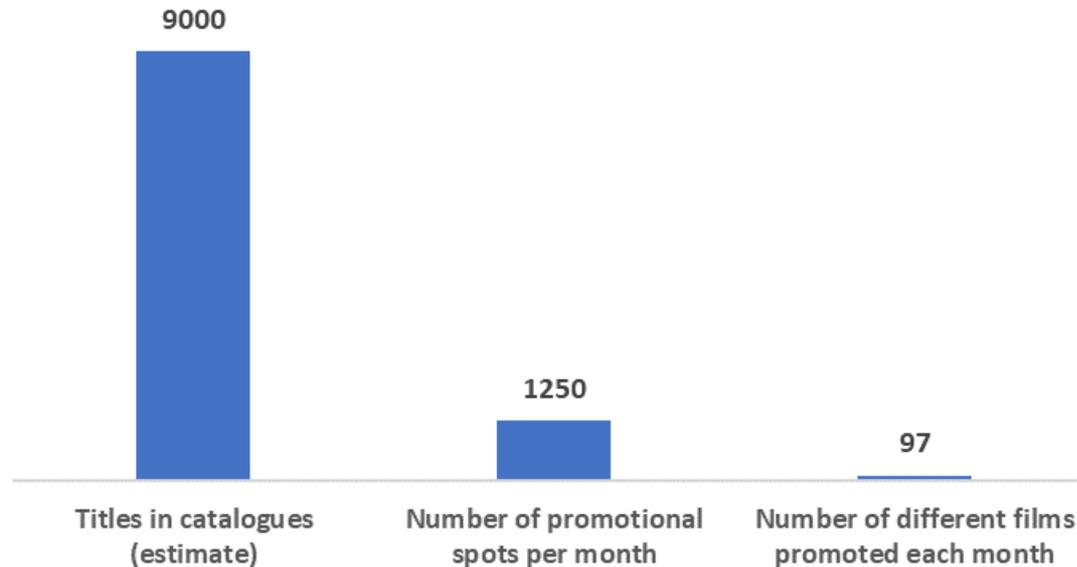
**Which content is promoted?**

# Which content is promoted?

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

- ▶ On average, a TVOD service proposes about 1 250 promotion spots during a given month.
- ▶ On average, these promotion spots are used to promote about 100 different titles (films and TV content) during a given month, i.e. about 1% of the total catalogue.

Size of catalogues and number of promotion spots and promoted films per month (averages per service, units, October 2021)



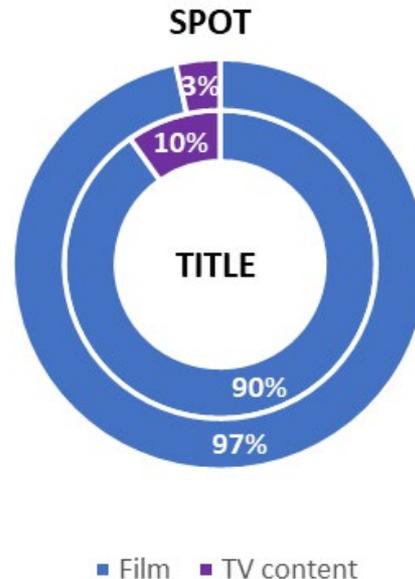
Source: European Audiovisual Observatory analysis of AQOA data

# Which content is promoted?

## TVOD services dedicate the bulk of promotion to films

- ▶ Films account for 90% of titles promoted at least one and for 97% of all promotion spots. TVOD is indeed driven by the sale or purchase of films, as TV content has often been previously broadcast on TV (except for simultaneous releases of US TV series in Europe) and therefore lacks the novelty (and also notoriety) of films.

Breakdown of titles promoted and promotion spots between films and TV content (% , October 2021)



**How to read this graph:** films represent 90% of titles which are promoted at least once and 97% of promotion spots

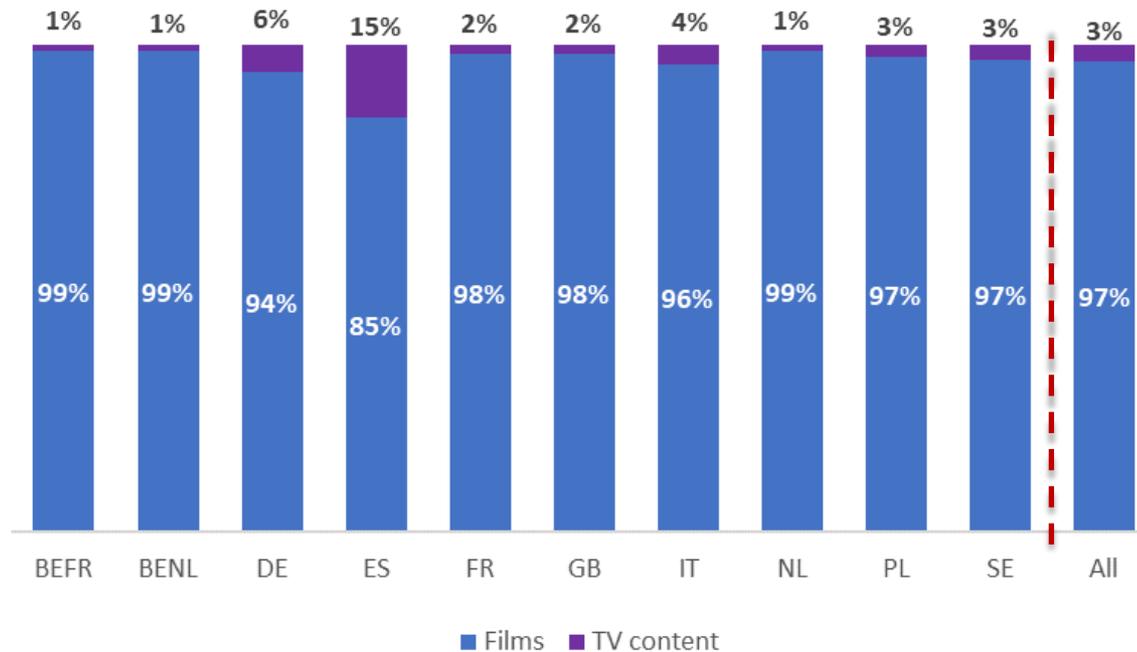
Source: European Audiovisual Observatory analysis of AQOA data

# Which content is promoted?

## More TV content promoted in Spain

- ▶ The promotion of TV content is marginal in most countries, with the exception of Spain, where it accounts for 15% of all promotion spots.

Breakdown of promotion spots between film and TV content  
(%, October 2021)

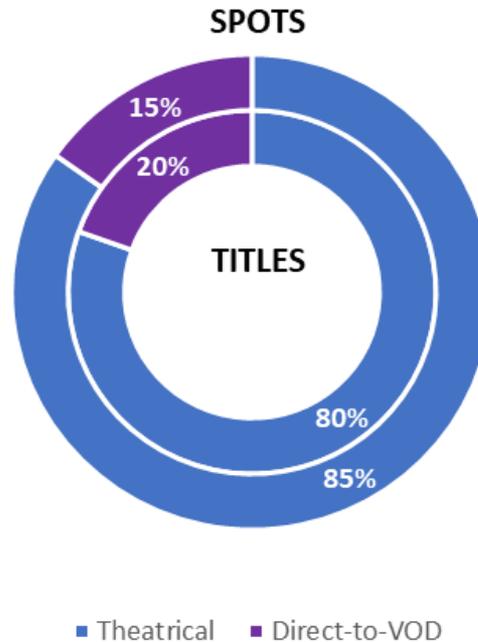


# Which content is promoted?

## TVOD services source primarily theatrical films

- ▶ Films theatrically released in the country are the prime source for films. The catalogue is complemented by “direct-to-VOD” films, i.e. films with no theatrical release the country.

Breakdown of films between theatrical and non theatrical  
(%, October 2021)



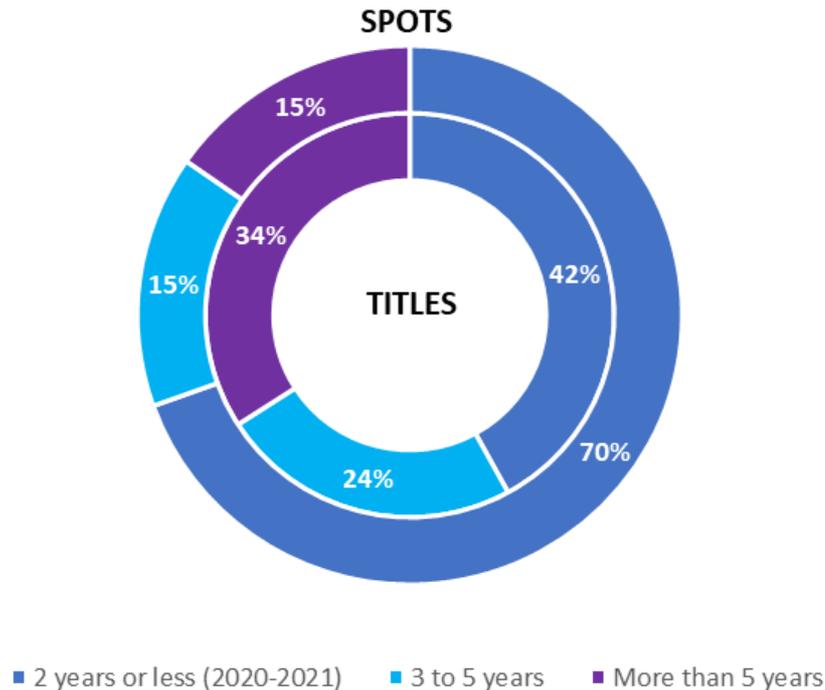
Source: European Audiovisual Observatory analysis of AQOA data

# Which content is promoted?

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

- ▶ Films produced in 2020 and 2021 represented 42% of all films promoted and 70% of promotion spots.
- ▶ When promoted, recent films are more intensively promoted than other films.

Breakdown of films promoted and promotion spots by age of title (% , October 2021)



**How to read this graph:** films aged 2 years or less represent 36% of films which are promoted at least once and 70% of promotion spots

Source: European Audiovisual Observatory analysis of AQOA data

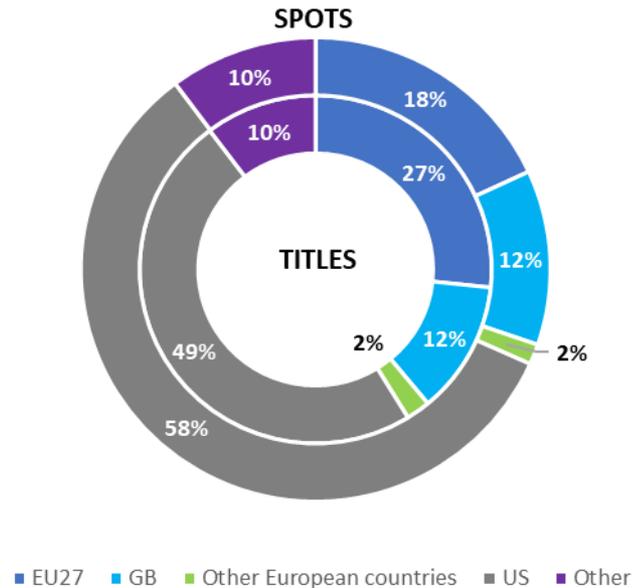
**What is the origin of the content promoted?**

# What is the origin of the content promoted?

The share of promotion captured by European works (32%) is similar to their share of TVOD catalogues (32%).

- ▶ EU27 works account for 27% of films promoted at least once (41% for all European works).
- ▶ But the share of EU27 works promoted at least once (27%) is lower than their share of promotion spots (18%), as US titles are present in more countries and services and therefore benefit from more promotion.
- ▶ The UK films alone account for 12% of all European works promotion spots.

Breakdown of works promoted and promotion spots by origin (% , October 2021)



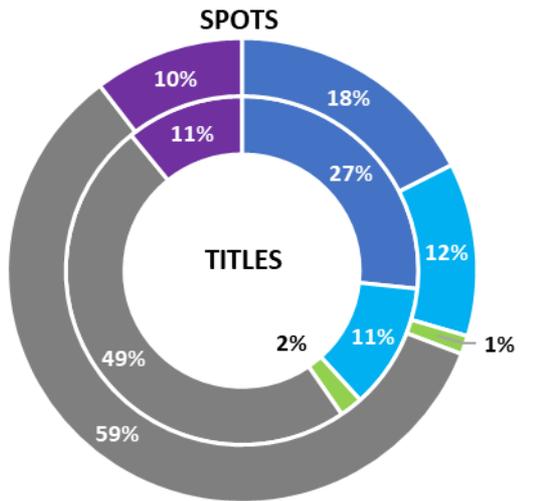
**How to read this graph:** EU27 titles account for 27% of titles promoted at least once and for 18% of promotion spots

# What is the origin of the content promoted?

## The share of European works promoted is higher for TV content than for films

- ▶ Within all works promoted, TV content only present a small minority (3%).
- ▶ But European TV content gets 56% of all promotion spots dedicated to TV content, whereas European film only gets 31% of all promotion spots dedicated to films.

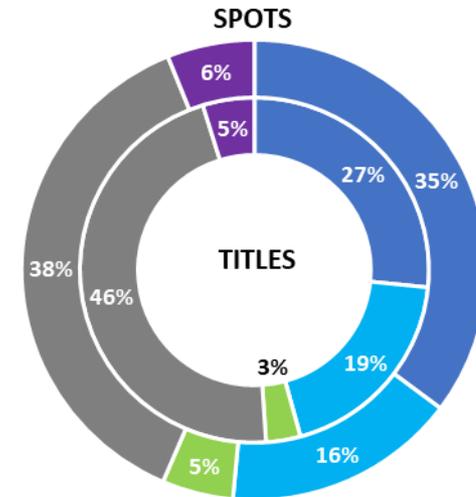
Breakdown of films  
promoted and promotion spots by origin (% , October 2021)



■ EU27 ■ GB ■ Other European countries ■ US ■ Other

Source: European Audiovisual Observatory analysis of AQOA data

Breakdown of TV content  
promoted and promotion spots by origin (% , October 2021)



■ EU27 ■ GB ■ Other European countries ■ US ■ Other

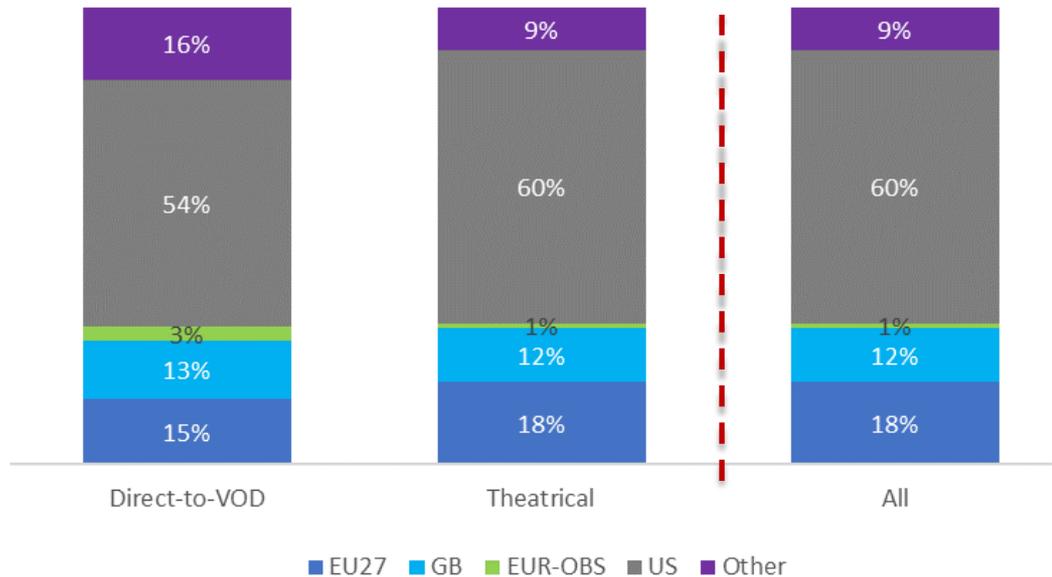
Source: European Audiovisual Observatory analysis of AQOA data

# What is the origin of the content promoted?

The share of EU27 and European films is similar for films theatrically released in the country and Direct-to-VOD films

- Films theatrically released in the country represent the bulk of promotion spots dedicated to films (85% of all film spots).

Breakdown of films promotion spots by category of films and origin (% , October 2021)



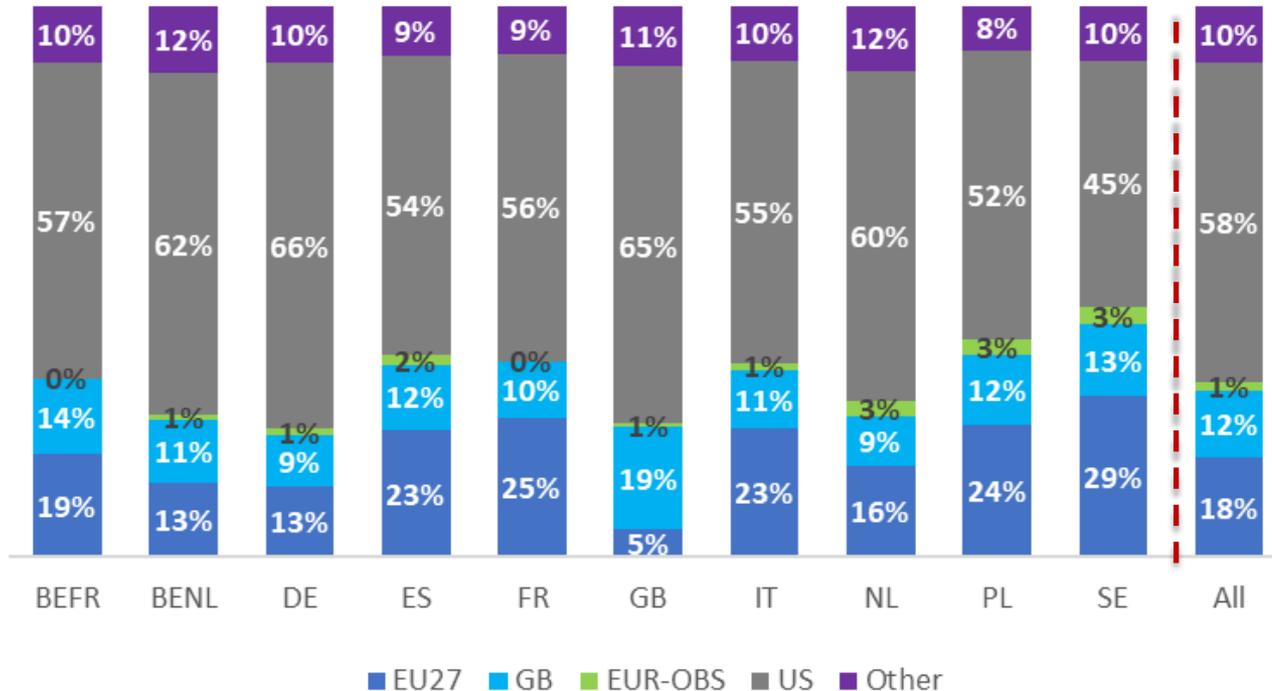
Source: European Audiovisual Observatory analysis of AQOA data

# What is the origin of the content promoted?

## Sweden, France and Poland promote more European works

- ▶ Swedish TVOD services dedicate 45% of promotion spots to European films. Poland, Spain France, and Italy also promote European films more than the average sample country.
- ▶ The lowest EU28 share of promotion spots is found in the UK, in the Netherlands and in Dutch-speaking Belgium.

Breakdown of promotion spots by origin and country (% , October 2021)



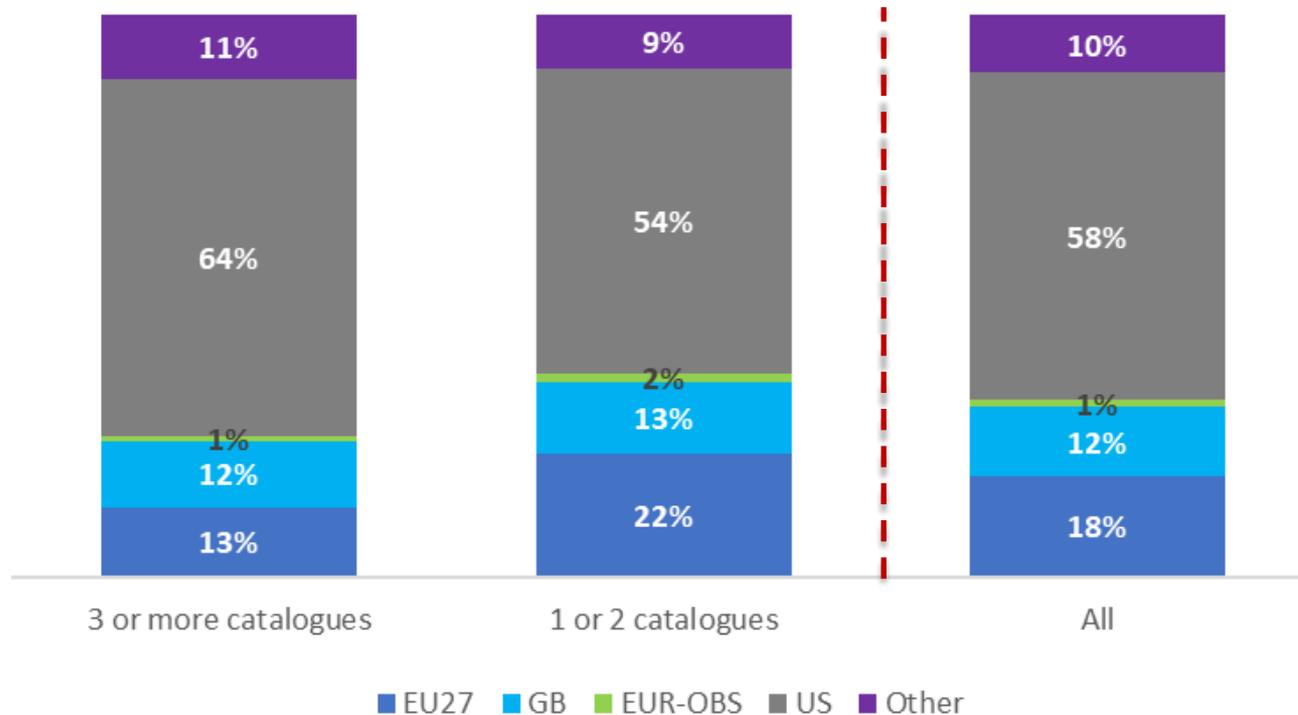
Source: European Audiovisual Observatory analysis of AQOA data

# What is the origin of the content promoted?

## Services with a multi-country presence grant less promotion spots to EU27 and European titles

- ▶ EU27 titles account for 13% of promotion spots for multi-country services vs. 22% for national services.
- ▶ Among European works, the share of GB works promoted is similar for all categories of TVOD services

Origin of promotion spots by category of service (% , October 2021)



**3 or more catalogues in the sample:** iTunes, Google Play, Xbox Live, totalising 23 catalogues

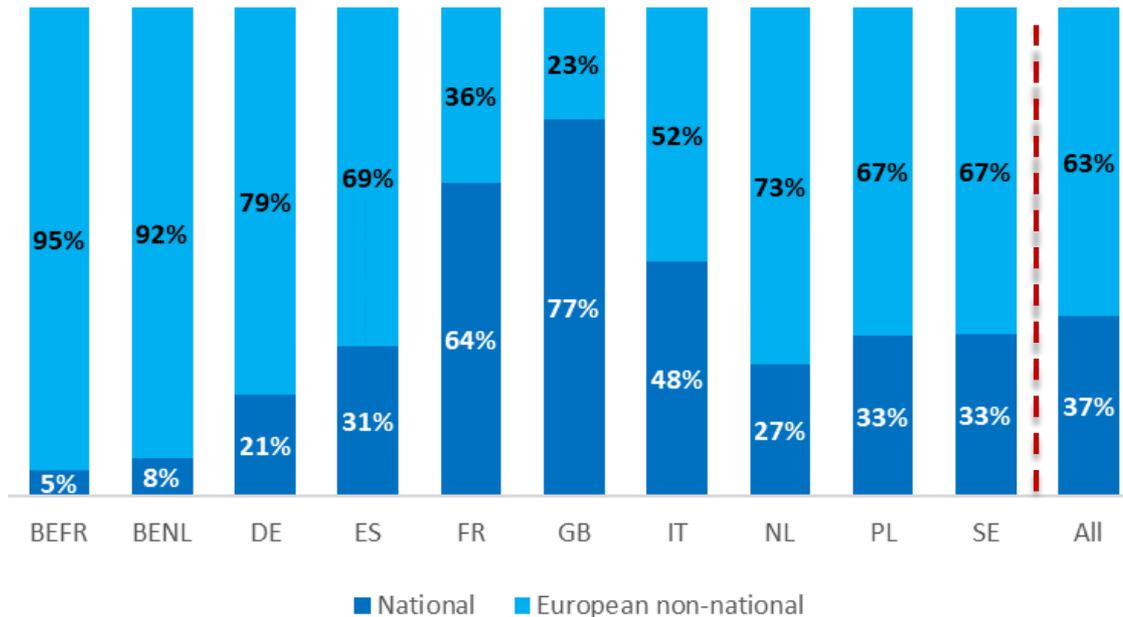
Source: European Audiovisual Observatory analysis of AQOA data

# What is the origin of the content promoted?

## Almost 2/3 of European non-national works among European works promoted

- ▶ On average, European non-national titles account for 63% of European promotion spots.
- ▶ The share of national titles among promotion spots is however higher than on average in the largest production countries (France, United Kingdom and, to a lesser extent, Italy).

Breakdown of European promotion spots by national and European non-national (% , October 2021)



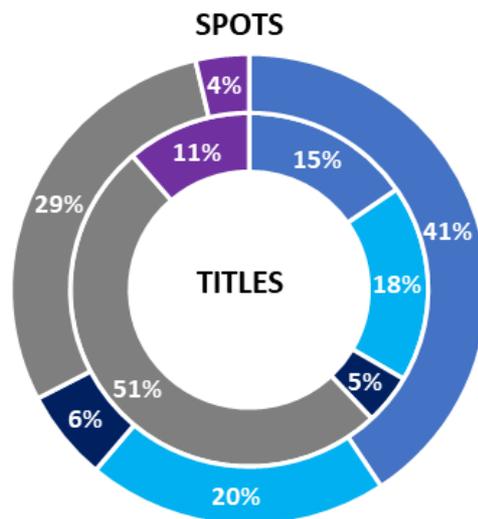
Source: European Audiovisual Observatory analysis of AQOA data

# What is the origin of the content promoted?

## Synthesis: 41% of promotion spots go to recent US films

- ▶ Combining the age and origin of titles shows the prominence of recent US films.
- ▶ Difference in the share of titles promoted and share of promotion spots reflects the fact that the same US films are present and therefore promoted in several territories.

Origin of promotion spots by age and origin (% , October 2020)



- Recent US films (2020-2021)
- Recent European films (2020-2021)
- Other recent films (2020-2021)
- Other films
- TV content

Source: European Audiovisual Observatory analysis of AQOA data

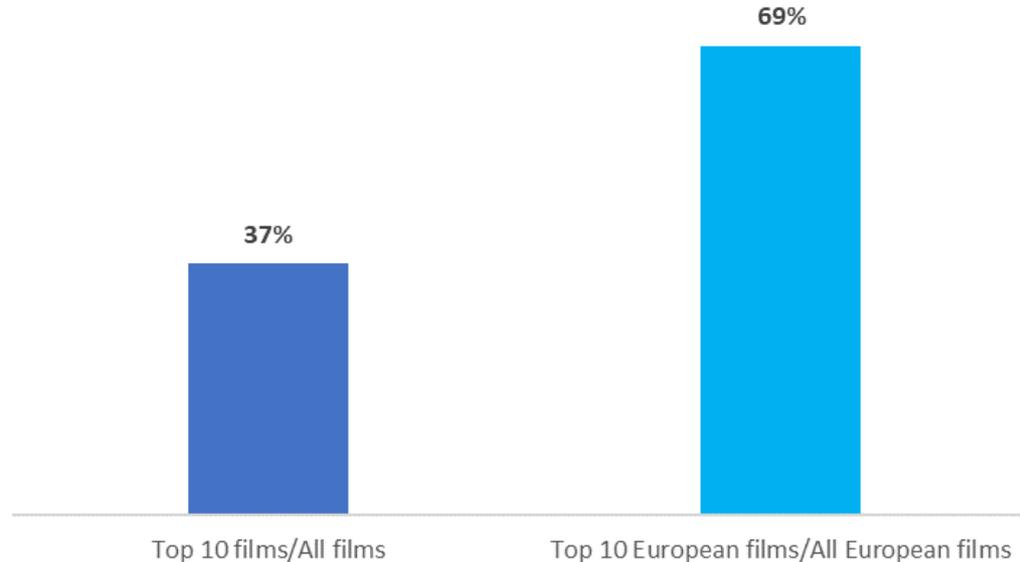
**How concentrated is the promotion?**

# How concentrated is the promotion?

## The top 10 promoted films benefit on average of 37% of promotion spots

- ▶ The concentration of promotion within European films is significantly higher (69%) than for films of all origin (38%).

Average share of promotion spots for the top 10 promoted titles  
(%, October 2021)



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

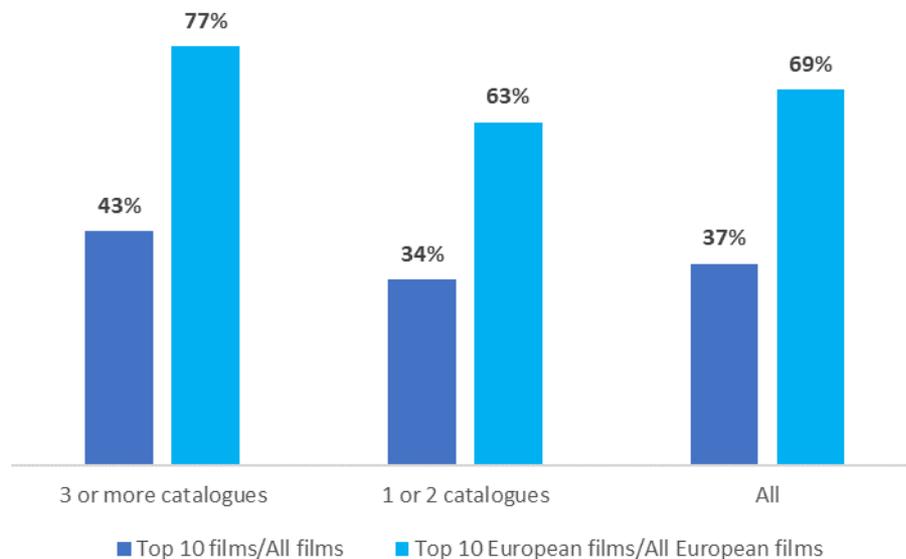
Source: European Audiovisual Observatory analysis of AQOA data

# How concentrated is the promotion?

## Promotion of films is more concentrated in multi-country services than in national services

- ▶ The concentration of promotion is higher both for all films and for European films.

Average share of promotion spots for the top 10 promoted titles by category of services (% , October 2021)



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

**3 or more catalogues in the sample:** iTunes, Google Play, and Xbox Live, totalising 23 catalogues.

Source: European Audiovisual Observatory analysis of AQOA data

# How concentrated is the promotion?

**No European film in the top 10 most promoted films. 6 out of the 10 most promoted European films are coproductions with the US.**

Top 10 promoted titles (October 2021)

Title	Year	Origin	Number of countries/regions where promoted	Number of services where promoted	Promotion spots
Cruella	2021	US,GB	10	41	1335
The Suicide Squad	2021	US,CA,GB	9	38	1298
Nobody	2021	JP,US	10	46	1285
Fast & Furious Hobbs & Shaw	2019	US,JP	8	30	1182
Free Guy	2021	US,CA	8	26	1029
Godzilla Vs Kong	2021	US,AU,CA,IN	8	34	905
Peter Rabbit 2 : The Runaway	2021	US,AU,IN	8	35	850
Malignant	2021	US,CN	8	36	808
Venom	2018	CN, US	10	26	753
Chaos Walking	2021	US,CA,HK,LU	8	23	730

Top 10 promoted EU 28 titles (October 2020; all territories)

Title	Year	Origin	Number of countries/regions where promoted	Number of services where promoted	Promotion spots
Wrath Of Man	2021	GB,US	8	27	713
The Father	2020	GB,FR	8	27	678
Promising Young Woman	2020	GB,US	9	25	528
The Courier	2019	GB,US	4	21	419
Le Discours	2020	FR,BE	3	11	386
Hitman'S Wife'S Bodyguard	2021	GB,US	5	14	360
Spectre	2015	GB,US,AT,MX,IT,MA	8	16	358
The Mauritanian	2021	GB,US	5	17	287
Chacun Chez Soi	2021	FR	3	9	264
Luca Tanzt Leise	2016	DE	8	20	259

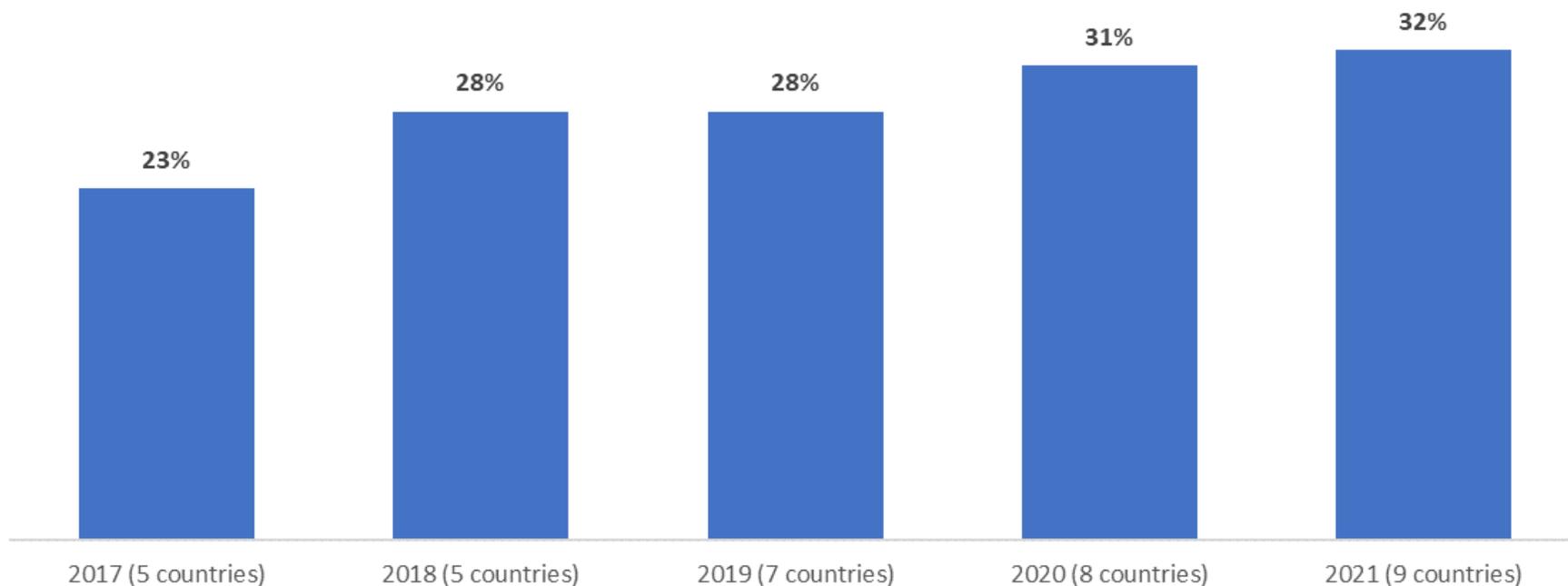
**Any trend in the European works' share of promotion spots?**

# Any trend in the European works' share of promotion spots?

## The European works' share of promotion spots seems to increase

- ▶ The sample countries and services have significantly increased overtime. Still, TVOD services seem to dedicate more space to the promotion of European works.

European works' share of promotion spots (% , 2017-2020)



Source: European Audiovisual Observatory analysis of AQOA data

## **Annex: list of services in the sample**

# Sample: 54 services from 10 countries/territories

## List of services in the sample

### Belgium (French speaking)

Google Play  
iTunes  
Proximus.be  
Voo Evasion  
XBOX Live

### Belgium (Dutch speaking)

Google Play  
Proximus.be  
Telenet - Films A La Carte  
XBOX Live  
iTunes

### France

Amazon Instant Video  
Bbox  
Canal VOD  
Google Play  
iTunes  
Orange VOD  
SFR CanalVOD  
XBOX Live

### Germany

Amazon Instant Video  
Google Play  
iTunes  
Maxdome  
Sky  
Videociety  
XBOX Live  
Videoload

### Italy

Chili  
Google Play  
iTunes  
Rakuten

### Netherlands

Google Play  
iTunes  
Pathe Thuis  
XBOX Live  
Ziggo

### Poland

Canal+  
iTunes  
UPC  
VOD.pl

### Spain

Filmin  
iTunes  
Movistar+  
Rakuten

### Sweden

iTunes  
Sfanytime  
Triart.se  
ViaPlay

### United Kingdom

Amazon Instant Video  
BT  
Google Play  
iTunes  
Sky  
Virgin  
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