



AVAILABILITY OF A SAMPLE OF EUROPEAN FILMS ON VoD SERVICES


Hearing on the promotion of European films and TV series on-line

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**OBSERVATOIRE EUROPÉEN DE L'AUDIOVISUEL
EUROPEAN AUDIOVISUAL OBSERVATORY
EUROPÄISCHE AUDIOVISUELLE INFORMATIONSTELLE**



- 
- Data on the number of on-demand audiovisual services in the European Union
 - Analysis of the availability of a sample of 50 leading European films on VoD services

THE EUROPEAN AUDIOVISUAL OBSERVATORY HAS ENLARGED THE MAVISE DATABASE TO ON-DEMAND AUDIOVISUAL SERVICES : 3200 OD AVS IDENTIFIED



MAVISE
Database on TV and on-demand audiovisual services and companies in Europe

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Welcome to the MAVISE database

MAVISE provides you with detailed profiles of:

- 29 national TV markets
- 10109 television channels
- 3080 on-demand audiovisual services
- 7886 companies (broadcasters, packagers, transmitters)
- 5387 TV programmes (news, current affairs, political programmes)

What are you looking for?

Information on:

- A specific national audiovisual market
- A specific TV channel
- A specific on-demand audiovisual service
- A specific audiovisual company
- A specific news or current affairs TV programme

A list of:

- Licensing / registering authorities in a country
- TV channels
- On-demand audiovisual services
- Companies in a country
- News or current affairs TV programmes in a country

Advanced search mode

The advanced search option allows you to perform multiple criteria searches.

<http://mavise.obs.coe.int>

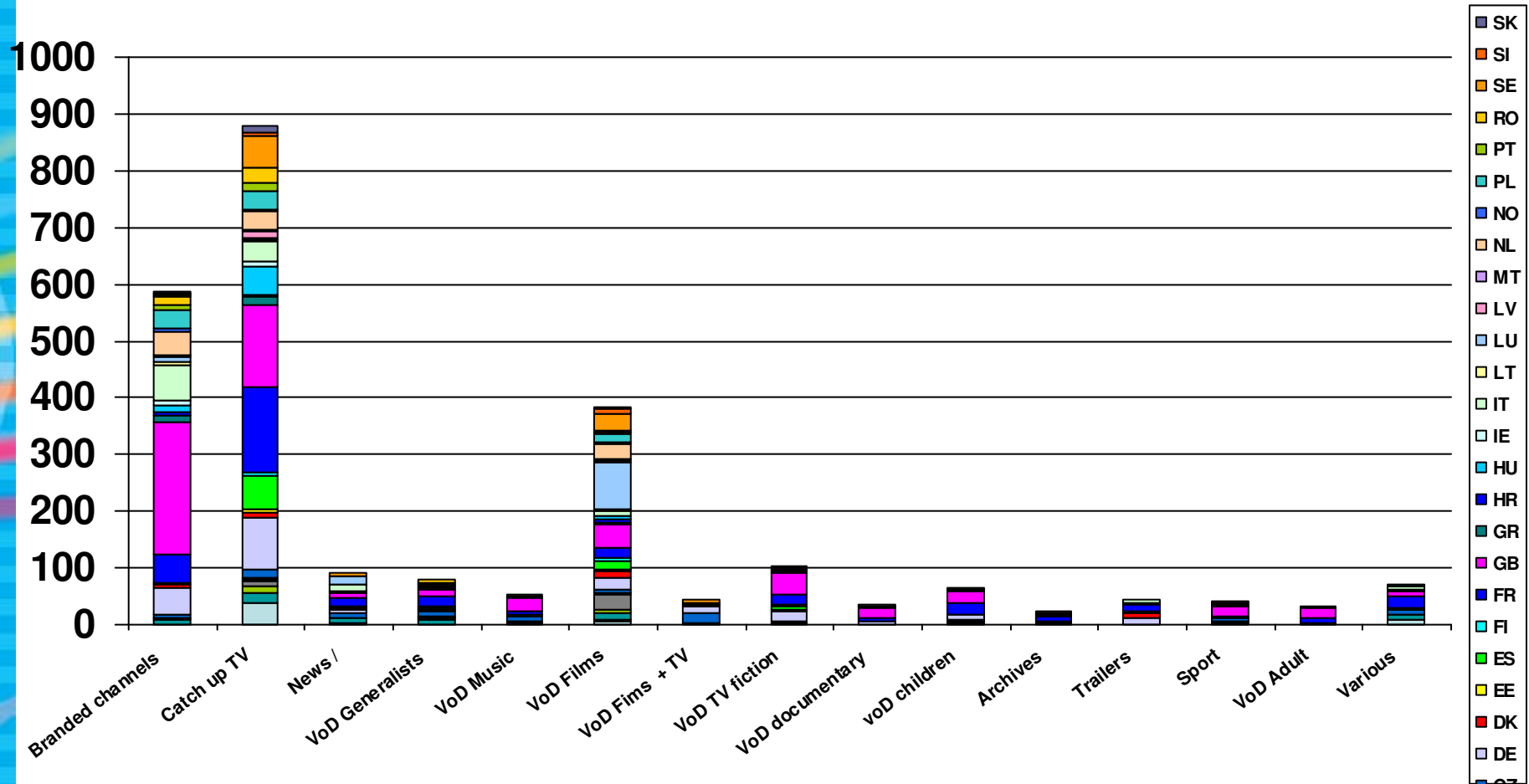


This database MAVISE is edited and published by the [European Audiovisual Observatory](#).
The software of the database was developed in the framework of a contract with the [DG Communication of the European Commission](#) (2007-2011) and owned by the European Union (represented by the European Commission).
Whilst the software of the database is property of the European Union, the European Audiovisual Observatory is the owner of its content, with the exception of elements provided by third parties, in particular Lyngemark Satellite providing information on the line-up of satellite channels and Bureau Van Dijk providing information on the addresses of companies.
The data collection process of information on the European television and on-demand audiovisual markets by the European Audiovisual Observatory is partly made possible in the context of a framework contract with the DG Communication of the European Commission (2012-2016) and specific contracts with this DG (for television) and DG for Communications Networks Content and Technology (for on-demand audiovisual services).
The data collection process has benefited from the help of the European Platform of Regulatory Authorities.
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The views and opinions of authors expressed herein do not necessarily state or reflect those of the European Commission or the European Audiovisual Observatory or the Council of Europe. The fact that a television service or an on-demand audiovisual service is included in the database does not represent a position from the Observatory, from the European Commission or from any regulatory authority regarding its legal situation. In particular, the criteria used to include audiovisual services (television, on-demand audiovisual services) in the database are not completely similar to those defined by the European Directive on Audiovisual Services or by the transposition of this Directive in the national laws of Member States.
While every care has been taken to ensure accuracy, no guarantee is given that the material is free from error or omission. Our goal is to keep this information timely and accurate. In particular, an important number of on-demand audiovisual services accessible through distribution platforms do not provide clear identification of the company providing services. In a significant number of cases the identification of the company providing on-demand audiovisual services, and hence of the country of establishment of the services, is based on rational assumptions by the expert and analysts feeding the database. If errors are brought to our attention, we will try to correct them. If you wish to propose changes concerning the presentation of your company in the database, please contact: mavise@coe.int

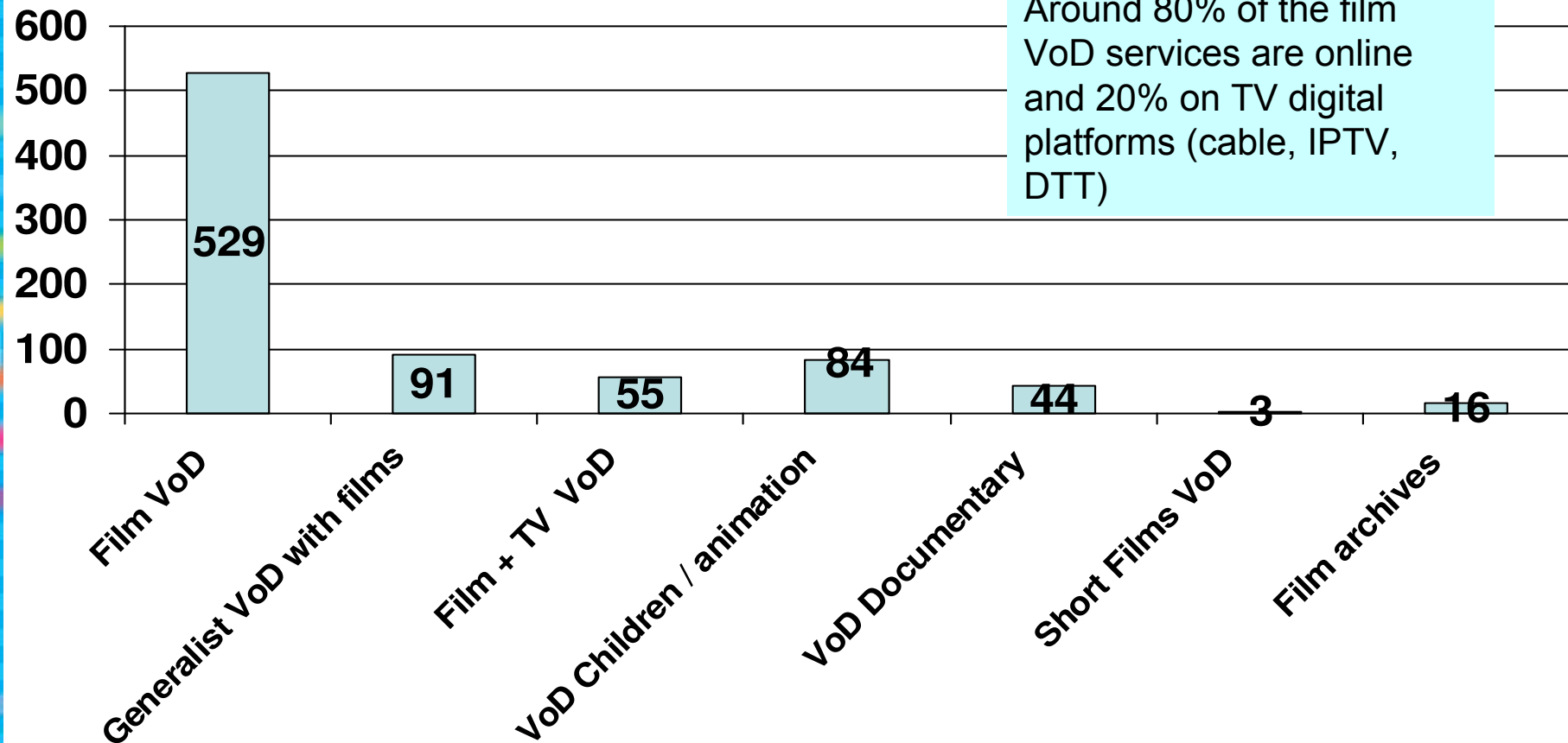


2459 ON-DEMAND AUDIOVISUAL SERVICES ESTABLISHED IN THE EU (April 2013)

Source : European Audiovisual Observatory / MAVISE database

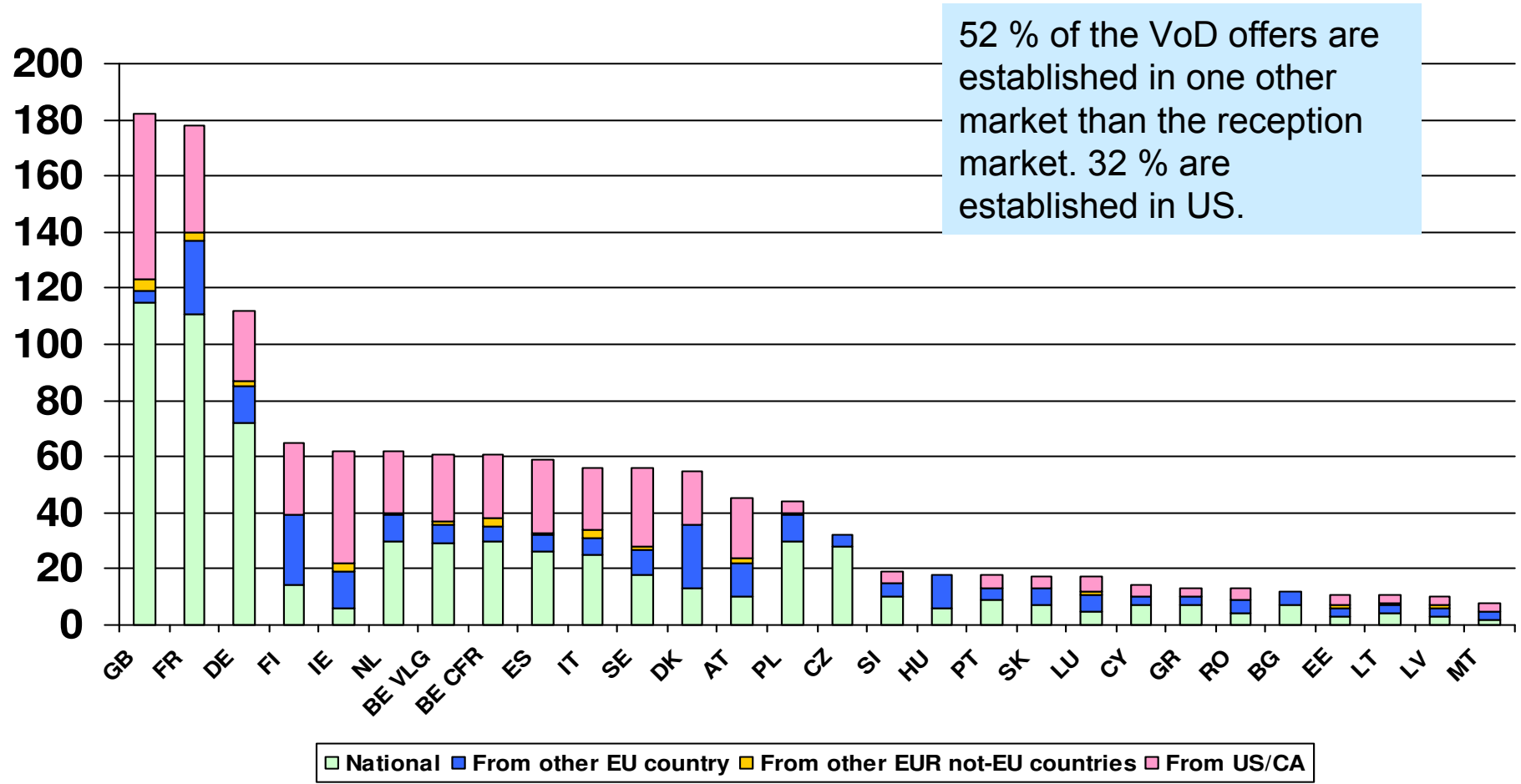


822 FILM VOD SERVICES IN THE MAVISE DATABASE (May 2013)



NUMBER OF VOD SERVICES (ALL GENRES EXCEPT ADULTS) AVAILABLE IN THE EU COUNTRIES – April 2013

Source: European Audiovisual Observatory / MAVISE database



NUMBER OF FILM VOD SERVICES BY COUNTRY OF ESTABLISHMENT (April 2013)

Source: European Audiovisual Observatory – MAVISE database

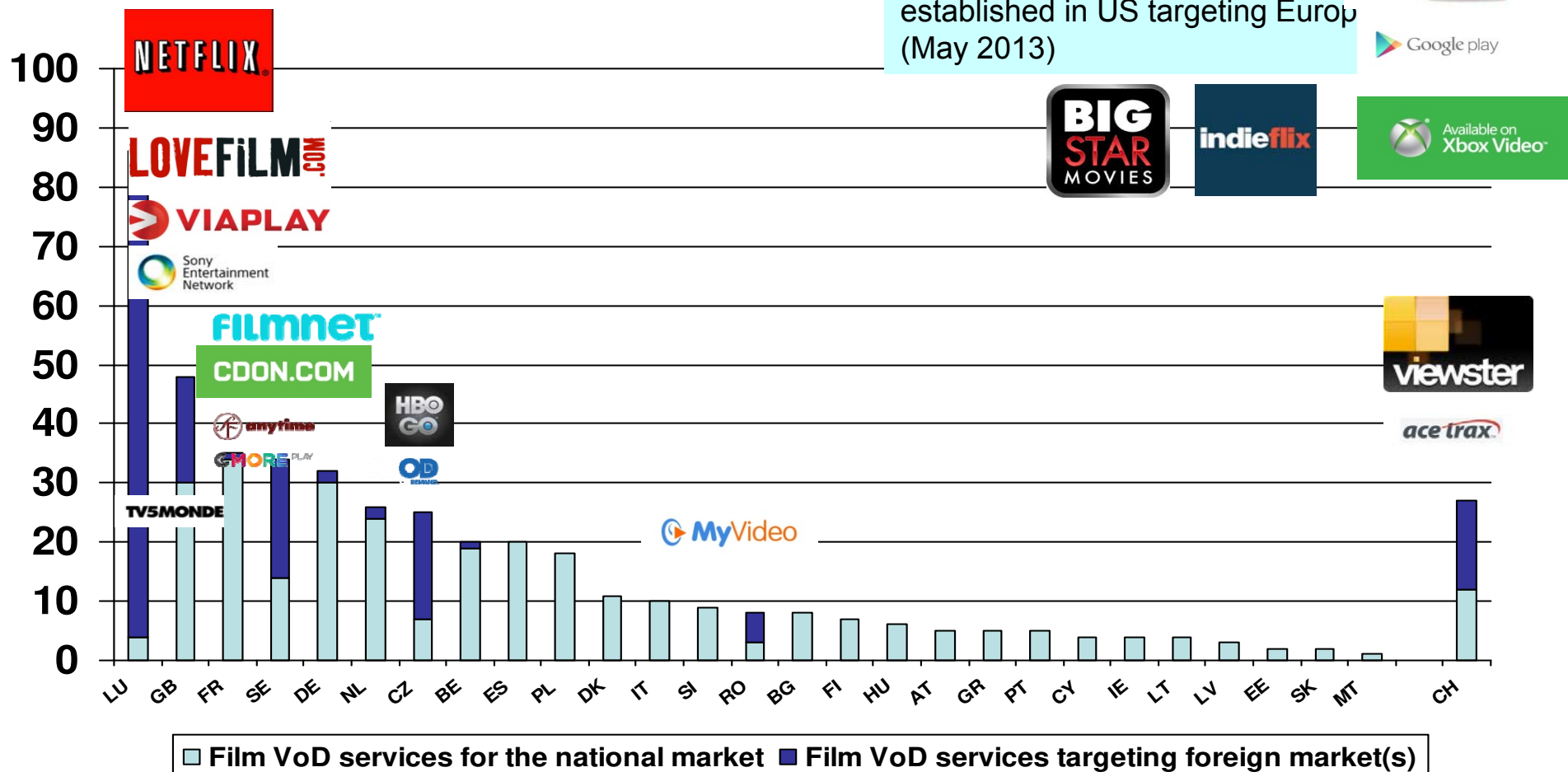
MUBI

Apple iTunes

... and 125 film VoD services established in US targeting Europe (May 2013)

YouTube

Google play

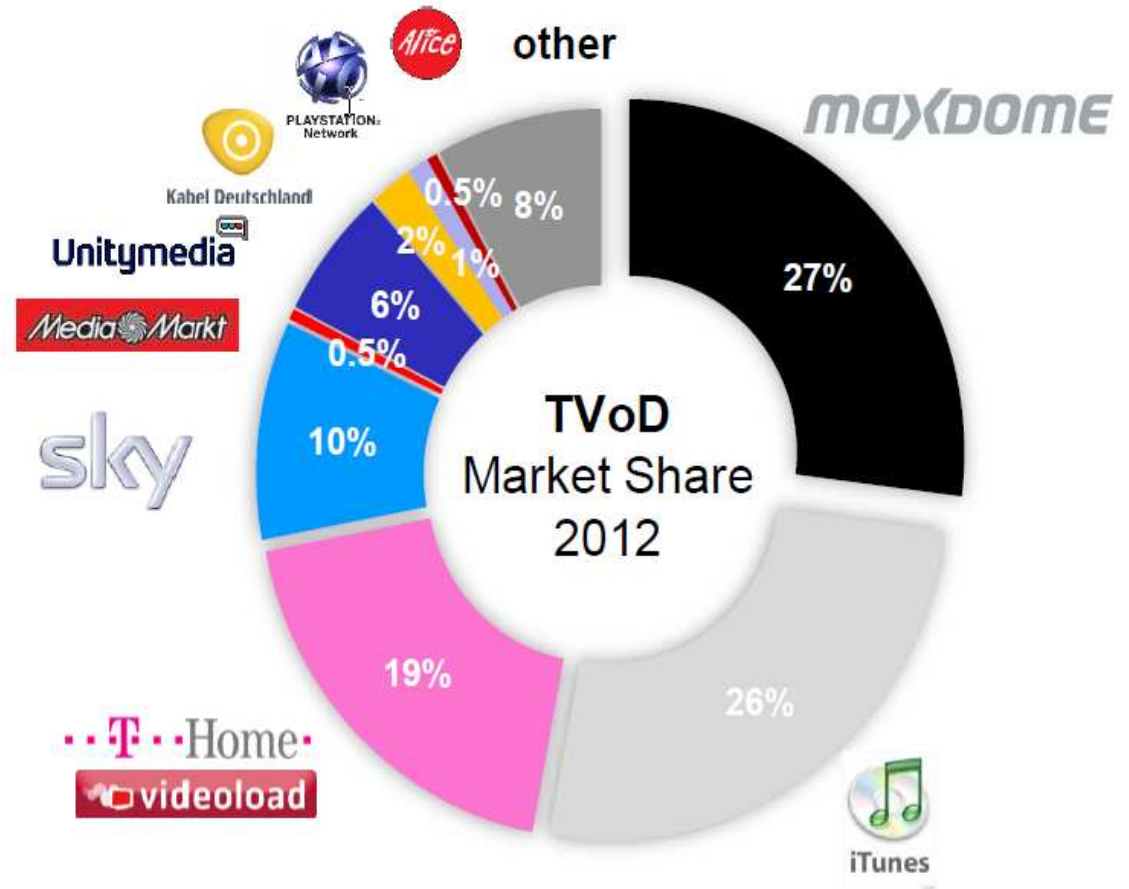


48% OF VoD SERVICES IN THE EU ARE UNDER US CONTROL (APRIL 2013)



MARKET SHARE OF VOD SERVICES IN GERMANY (1st Semester 2012)

Source: GfK Panel Service Germany, 2012; n=652 VoD/ PpV; evaluation period: Jan – Jun;
revenues in percent



METHODOLOGY : A SAMPLE OF 50 SIGNIFICANT EUROPEAN FILMS

➤ **Aim of study:** *Test the availability of a sample of 50 European movies* in the catalogues of VoD providers in EU 27 (national and pan-European VoD providers) and search for means of prominence for European works

→ Indication of the presence of European works in catalogues

→ Indication of means of prominence used for European works

➤ **Sample:** Selection of 50 successful European movies: Top 25 European « Blockbusters » & last 25 European Film Awards (EFA) winners

→ « Valuable » video content in the eyes of the customers (*commercial success*) & critics (*quality*)

→ Sample ***statistically not significant*** = *no general conclusions can be drawn* on catalogues and strategy in regard to European movies but rather ***assumptions, hypotheses and indications*** that need to be tested in a more exhaustive catalogue analysis

[Results are only valid for time period – July-September 2013]



DATA COLLECTION, WITH THE COLLABORATION OF THE EFARN NETWORK

→ « Questionnaire » elaborated for sample analysis in order to:

- Test the presence of movie titles in catalogues
- Search for 6 means of prominence (*European films on homepage, European/National film section, Search function for European films, Recommendation for European films, Special offers on European films, Presence of trailers presenting European films*)
- French VoD providers, pan-European players (Apple, Microsoft, Google Play, MUBI) examined through desk research (July 2013)
- National markets (EU 27): « Questionnaire » sent out to EFARN members (on a voluntary basis) in order to search for sample of movies in catalogues of their most important national VoD providers (August-September 2013)

➤ Results :

- Up-to-date 12 answers (BE, DE, DK, EE, GB, IT, NL, PL, SE) + CH, NO, RU
- Data for 91 services available in EU

The Movie sample : 25 European « Blockbusters »

Year	Production	Original Movie title	Admissions ¹		Gross ³ in \$ MIL
			Total EU 27	national	
2012	GB / US	SKYFALL	44 464 388	15 945 446	1 109
2011	FR	INTOUCHABLES	39 775 583	21 414 629	351
2001	GB / US	BRIDGET JONES'S DIARY	29 029 836	9 723 791	172 (7)
1999	GB / US	NOTTING HILL	28 206 327	7 419 281	363
2008	FR	BIENVENUE CHEZ LES CH'TIS	25 511 247	20 488 339	164 (8)
1997	GB / US	BEAN: THE ULTIMATE DISASTER MOVIE	24 610 209	4 588 253	232
2002	FR / DE	ASTÉRIX & OBÉLIX : MISSION CLÉOPÂTRE	21 568 619	14 313 876	111
1999	FR / DE / IT	ASTÉRIX ET OBÉLIX CONTRE CÉSAR	20 735 290	8 745 213	n.a.
1997	FR	LE CINQUIÈME ÉLÉMENT	20 658 138	7 696 617	264
2004	GB/US/FR/D E/IE	BRIDGET JONES: THE EDGE OF REASON	19 560 087	7 943 695	110 (7)
2008	GB	SLUMDOG MILLIONAIRE	16 667 974	5 820 652	191 (5)
2003	GB / US	LOVE ACTUALLY	15 460 165	7 543 045	245
2007	GB/FR/DE/U S	MR. BEAN'S HOLIDAY	14 727 660	4 378 026	217
2001	ES / US	THE OTHERS	14 395 223	6 356 779	210
2001	DE	DER SCHUH DES MANITU	13 905 986	11 719 160	81
2003	GB / US	JOHNNY ENGLISH	13 778 649	4 041 542	157
2008	FR / DE / ES / IT	ASTÉRIX AUX JEUX OLYMPIQUES	13 502 542	6 812 378	83 (10)
2000	GB / FR	BILLY ELLIOT	12 433 972	3 893 407	109
2000	FR	TAXI 2	12 214 697	10 239 220	n.a.
2004	FR / CH	LES CHORISTES	11 917 515	8 356 492	n.a.
2006	DE / ES / FR	PERFUME: THE STORY OF A MURDERER	11 047 765	5 589 217	132
2006	FR	LES BRONZÉS 3: AMIS POUR LA VIE	10 797 463	10 223 008	n.a.
1998	FR	LE DINER DE CONS	10 716 740	9 238 220	n.a.
2012	FR	TAKEN 2	10 440 956	2 904 902	376
2004	DE	(T)RAUMSCHIFF SURPRISE - PERIODE 1	10 372 090	9 150 736	80 (12)

1: Source - LUMIERE database lumiere.obs.coe.int

2: Also part of the Top 25 Box-office ranking

3: Source - IMDb <http://www.imdb.com>

(4): Only USA, NL & IT available

(5) (6): Only USA & GB

(7): Only USA, GB, IT & ES available

(8): FR, CH, BE

(9): ES & USA

(10): FR & IT

(11): DE, ES & USA

(12): DE

The Movie sample - The 25 European Film Awards (EFA) movies

Year	Production	Original Movie title	Admissions ¹		Gross ³ in
			Total EU 27	national	\$ MIL
1997	GB	THE FULL MONTY ²	24 550 188	11 096 718	244
2001	FR / DE	LE FABULEUX DESTIN D'AMELIE POULAIN ²	19 999 974	8 516 391	57,7 (7)
1997	IT	LA VITA E BELLA ²	19 612 396	5 726 295	229
2003	DE	GOOD BYE, LENIN!	10 632 563	6 574 961	77
1999	ES / FR	TODO SOBRE MI MADRE	7 703 145	2 581 391	22 (9)
2006	DE	DAS LEBEN DER ANDEREN	7 218 804	2 371 327	77
2002	ES	HABLE CON ELLA	6 763 943	1 364 009	50
2010	FR / DE / GB	THE GHOST WRITER	4 580 560	1 048 701	74
2000	DK/FR/SE/DE/NO/NL/IS	DANCER IN THE DARK	3 403 709	202 782	40
2008	IT	GOMORRA	3 358 122	1 747 859	35
2009	DE / AT / FR / IT	DAS WEISSE BAND	2 337 311	668 825	2,4 (6)
2005	FR / AT / DE / IT	CACHÉ	1 681 765	517 258	n.a.
2011	DK/SE/FR/DE/IT	MELANCHOLIA	1 481 055	56 687	n.a.
2012	FR / DE / AT	AMOUR	1 440 481	619 650	9,5 (4)
2007	RO	4 LUNI, 3 SAPTAMANI SI 2 ZILE	1 064 364	89 339	n.a.
2004	DE/TR	GEGEN DIE WAND	791 141	1 619 814	n.a.
1996	DK/SE/FR/NL	BREAKING THE WAVES	298 608	2 980 848	7 (11)
1998	FR	TOPIO STIN OMICHLI	n.a.	n.a.	n.a.
1995	GB / ES / DE	LAND AND FREEDOM	n.a.	n.a.	n.a.
1994	IT / FR / CH	LAMERICA	n.a.	n.a.	5
1992	IT / CH / FR	IL LADRO DI BAMBINI	n.a.	n.a.	n.a.
1991	FR/RU	ΥΡΓΑ	n.a.	n.a.	n.a.
1990	IT	PORTE APERTE	n.a.	n.a.	n.a.
1990	GB	RIFF-RAFF	n.a.	n.a.	n.a.
1988	PL	KROTKI FILM O ZABIJANIU	n.a.	n.a.	n.a.

91 SERVICES ANALYSED

VoD providers examined per country

	VoD 1	VoD 2	VoD 3	VoD 4	VoD 5	VoD 6
BE	Univers Ciné	Telenet	Belgacom	VOO	-	-
DE	Videoload	Maxdome	Watchever	LOVEFiLM	Sky	Unitymedia
DK	TDC	Viaplay	TV2 Play	Netflix	HBO Nordic	-
EE	Starman	Elion	-	-	-	-
FR	Canal Play VoD	Orange VoD	Sony Enter.	My TF1 VoD	Univers Ciné	Canal Play Infinity
GB	Blinkbox	Film 4OD	Netflix	Virgin Media	Sky	
IT	Chili TV	Cubovision	Sky on demand	Mediaset Premium	My Movies	Rai Cinema
NL	Ximon	Videolandondemand	Moviemaxonline	KPN	-	-
PL	vod.pl	ipla.tv	iplex.pl	tvnplayer.pl	vod.tvp	kinoplex
SE	Viaplay	SF Anytime	Telia	Voddler	Netflix	Filmnet

Under Inter/US control

- + 26 iTunes Stores
- + 12 Xbox overall offer
- + 2 Google Play (FR, GB)
- + MUBI (French version)

THE PRESENCE OF FILMS OF THE SAMPLE IN THE VOD SERVICES ANALYSED

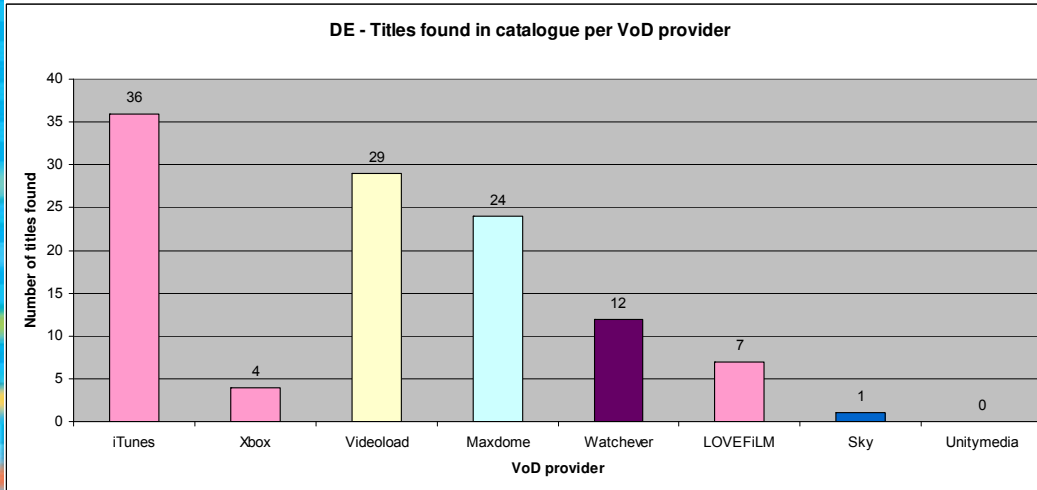
	VoD Services																		Pan-European Players											
	VoD 1			VoD 2			VoD 3			VoD 4			VoD 5			VoD 6			Country Average (Top 4)			iTunes			Xbox			Google Play		
	Total	EFA	Blockb.	Total	EFA	Blockb.	Total	EFA	Blockb.	Total	EFA	Blockb.	Total	EFA	Blockb.	Total	EFA	Blockb.	Total	EFA	Blockb.	Total	EFA	Blockb.	Total	EFA	Blockb.	Total	EFA	Blockb.
BE	9	8	1	8	6	2	4	1	3	3	1	2	-	-	-	-	-	-	6	4	2	17	7	10	4	1	3	-	-	-
DE	29	7	22	24	6	18	12	6	6	7	3	4	1	0	1	0	0	0	18	5,5	12,5	36	14	22	4	1	3	-	-	-
DK	24	11	13	17	8	9	7	4	3	5	2	3	0	0	0	-	-	-	13,25	6,25	7	11	5	6	3	1	2	-	-	-
EE	3	2	1	0	0	0	-	-	-	-	-	-	-	-	-	-	-	-	1,5	1	0,5	5	1	4	-	-	-	-	-	-
FR	23	11	12	21	11	10	10	3	7	9	5	4	6	5	1	2	2	0	9,75	5,25	4,5	30	11	19	5	1	4	6	2	4
GB	16	8	8	11	4	7	8	5	3	6	1	5	6	1	5	-	-	-	10,25	4,5	5,75	26	11	15	9	2	7	12	2	10
IT	8	6	2	6	5	1	3	2	1	2	0	2	2	1	1	1	1	0	4,75	3,25	1,50	20	12	8	3	1	2	-	-	-
NL	11	7	4	9	4	5	9	4	5	7	4	3	-	-	-	-	-	-	9	4,75	4,25	14	7	7	3	1	2	-	-	-
PL	13	6	7	11	3	8	2	2	0	0	0	0	0	0	0	0	0	0	6,50	2,75	3,75	5	1	4	-	-	-	-	-	-
SE	14	7	7	11	6	5	11	8	3	9	4	5	4	3	1	3	1	2	11,25	6,25	5,00	10	4	6	3	1	2	-	-	-
Under Inter/US control																														

	Percentage of Total (50 titles) [EFA (25 titles) + European Blockbusters (25)] found in catalogue																		Pan-European Players										
	VoD 1			VoD 2			VoD 3			VoD 4			VoD 5			VoD 6			iTunes			Xbox			Google Play				
	Total	EFA	Blockb.	Total	EFA	Blockb.	Total	EFA	Blockb.	Total	EFA	Blockb.	Total	EFA	Blockb.	Total	EFA	Blockb.	Total	EFA	Blockb.	Total	EFA	Blockb.	Total	EFA	Blockb.		
BE	18%	32%	4%	16%	24%	8%	8%	4%	12%	6%	4%	8%	-	-	-	-	-	-	34%	28%	40%	8%	4%	12%	-	-	-		
DE	58%	28%	88%	48%	24%	72%	24%	24%	24%	14%	12%	16%	2%	0%	4%	0%	0%	0%	72%	56%	88%	8%	4%	12%	-	-	-		
DK	48%	44%	52%	34%	32%	36%	14%	16%	12%	10%	8%	12%	0%	0%	0%	-	-	-	22%	20%	24%	6%	4%	8%	-	-	-		
EE	6%	8%	4%	0%	0%	0%	-	-	-	-	-	-	-	-	-	-	-	-	10%	4%	16%	-	-	-	-	-	-		
FR	46%	44%	48%	42%	44%	40%	20%	12%	28%	18%	20%	16%	12%	20%	4%	4%	8%	0%	60%	44%	76%	10%	4%	16%	12%	8%	16%		
GB	32%	32%	32%	22%	16%	28%	16%	20%	12%	12%	4%	20%	12%	4%	20%	0%	0%	0%	52%	44%	60%	18%	8%	28%	24%	8%	40%		
IT	16%	24%	8%	12%	20%	4%	6%	8%	4%	4%	0%	8%	4%	4%	4%	2%	4%	0%	40%	48%	32%	6%	4%	8%	-	-	-		
NL	22%	28%	16%	18%	16%	20%	18%	16%	20%	14%	16%	12%	-	-	-	-	-	-	28%	28%	28%	6%	4%	8%	-	-	-		
PL	26%	24%	28%	22%	12%	32%	4%	8%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	10%	4%	16%	-	-	-	-	-	-		
SE	28%	28%	28%	22%	24%	20%	22%	32%	12%	18%	16%	20%	8%	12%	4%	6%	4%	100%	20%	16%	24%	6%	4%	8%	-	-	-		
Under Inter/US control																													

- iTunes Stores provide higher proportion of films from the sample in DE, FR, GB, IT, BE, NL
- iTunes Store Germany has the best proportion (72 % of the sample, 88 % for the blockbusters, 56 % of the EFA films)
- National providers offer higher proportion of films from the sample than iTunes Stores in DK, PL, SE
- Google Play is in second position in UK as for the 'European blockbusters'

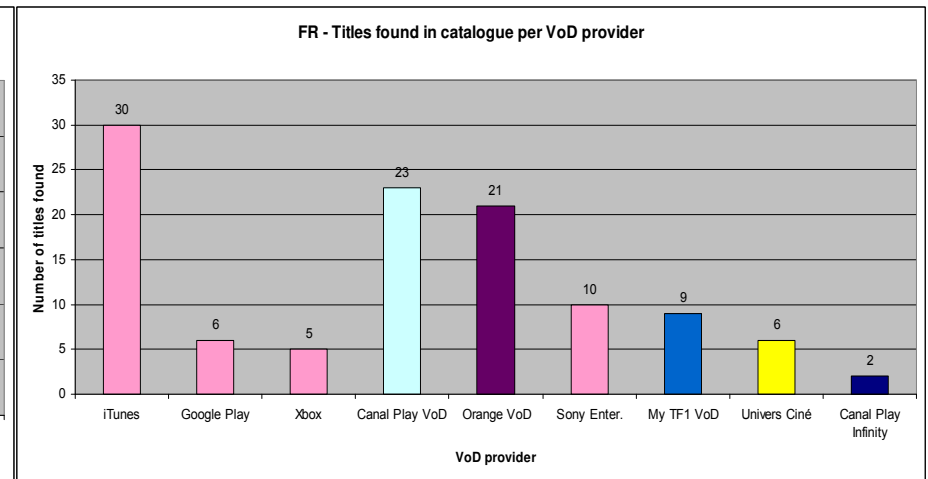
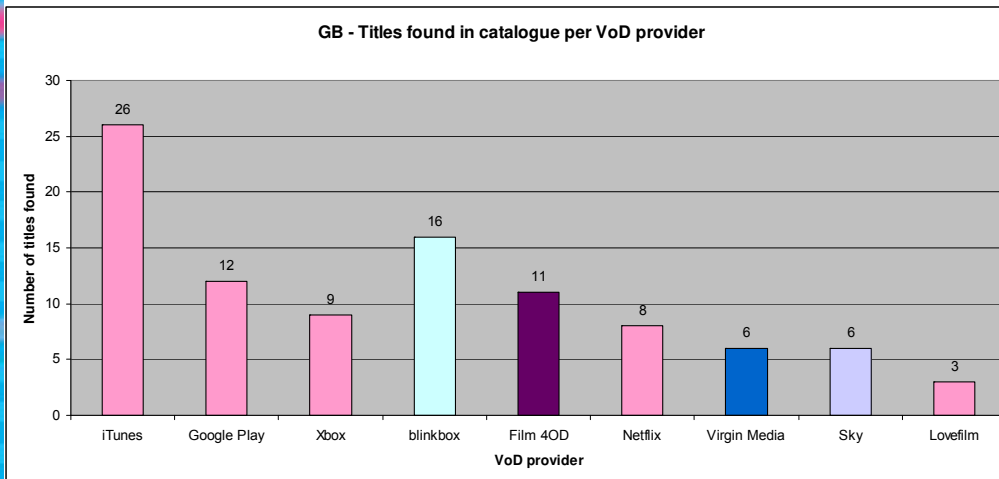
- **1st category:** Catalogue of national VoD provider >30% & iTunes above 50% : **DE, FR, GB**

➤ **Competitive markets** (*Videoload owned by Deutsche Telekom/Canal+ and Orange VoD by Orange/blinkbox (Tesco)*) which have the financial power to match Apple on VoD license deals → **Competition for customers** through valuable European movie licenses → Strategic VoD markets in the view of players



AVMSD Art. 13 transposition

- ➔ DE: no share & measures
- ➔ FR: share 60% EU works, 40% FR works – Prominence - Financial Contribution
- ➔ GB: Promotion; no share & measures

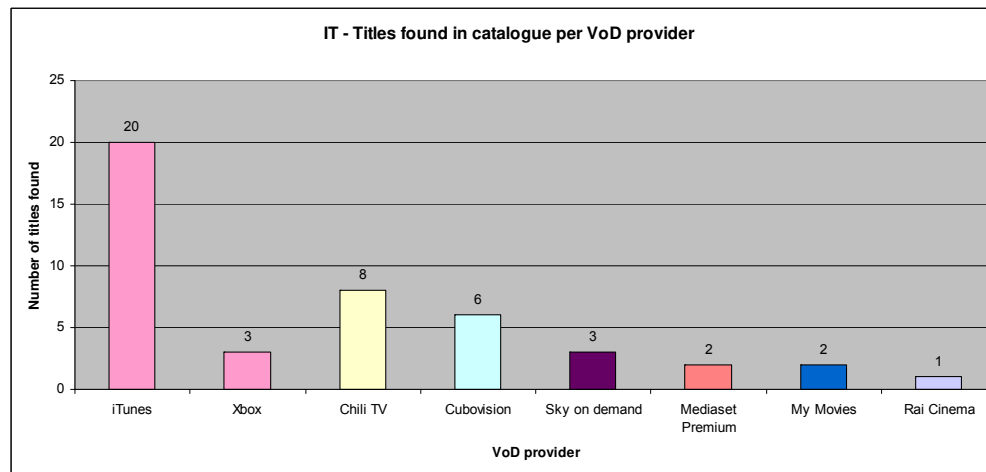
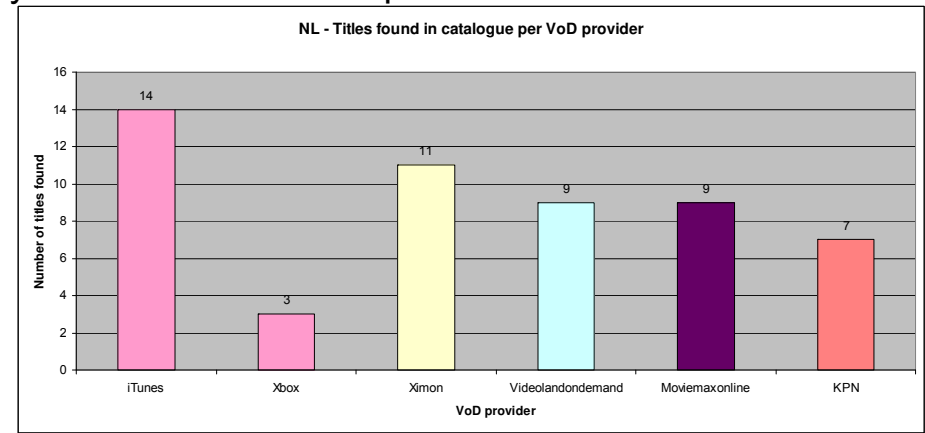
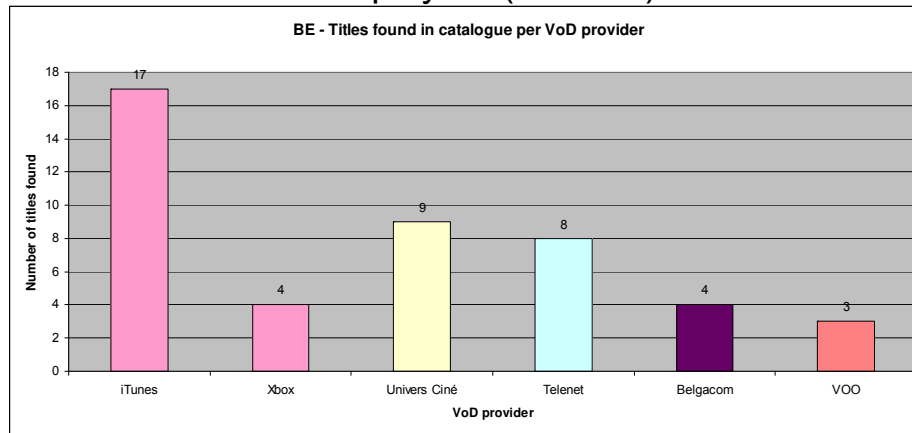


Under Inter/US control

• **2nd category:** Catalogues of national VoD providers have under 25% of sample and iTunes catalogues above 25% : **BE, IT & NL**

➤ Top national VoD providers are independent [*Univers Ciné (BE) and Ximon (NL – EYE & Film Institute), Chili TV (IT) is an independent joint-stock company 41% owned by Fastweb*]

➔ Not the financial resources to match Apple's for license deals and exclusivity for valuable European films? Other players (telecom) less interested by movies from the sample ?



Under Inter/US control



Art.13 ➔ BE: Prominence (BE - F), Promote, no share

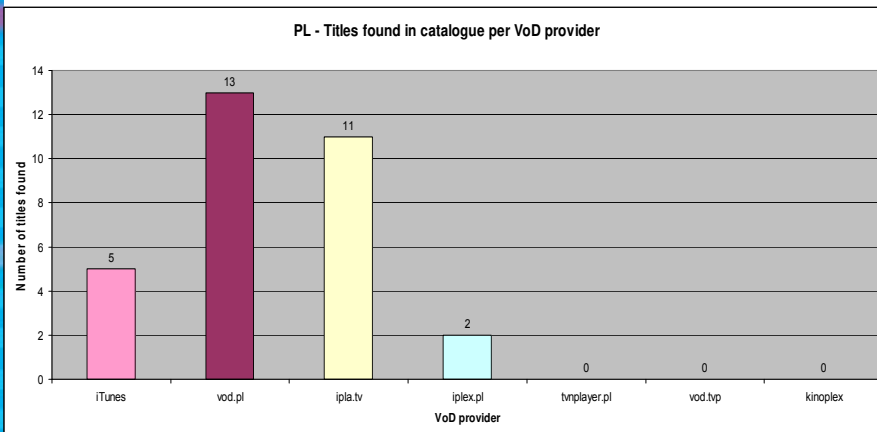
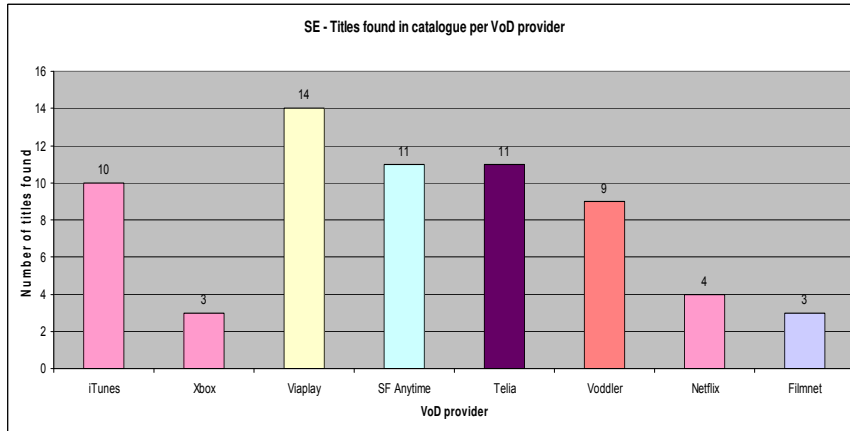
➔ IT: EU share 20% (or 5% financial contribution), Promote EU works

➔ NL: Promote EU works, no share

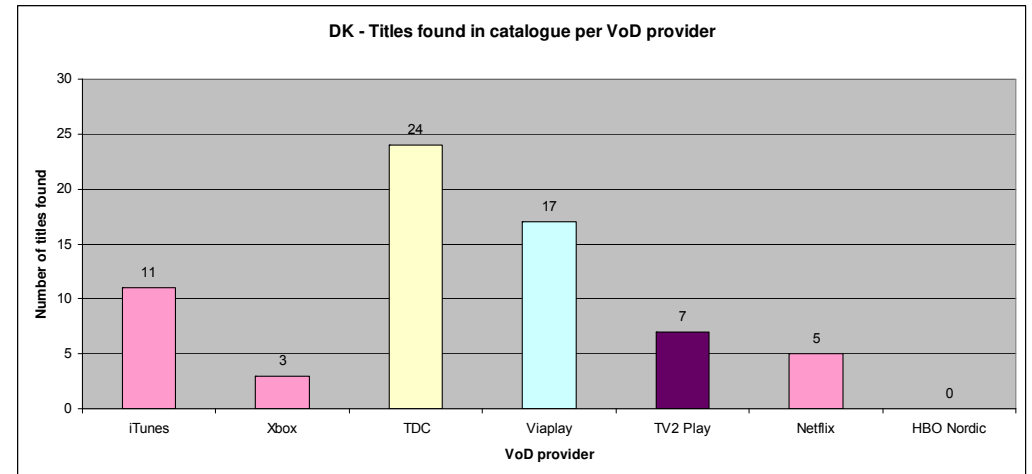
• **3rd Category:** National VoD providers have more sample titles in catalogue than iTunes: **DK, PL, SE**

➤ National players have financial resources to invest in content and license deals [TDC operated by telecom company, Viaplay by The Modern Time Group AB, SF Anytime by Bonnier Group, Telia by TeliaSonera/Polish vod.pl is owned by Axel Springer Group/Onet and ipla.tv owned by Cyfrowy Polsat]

➤ Competition on a national level for valuable European content ?



Under Inter/US control



Art. 13

➔DK: Promotion, Reporting, no share

➔PL: share 20% EU works, Prominence

➔SE: Promotion (except cable), Reporting, fixed Financial contribution

Means of prominence employed by national VoD providers

Means of prominence	Denmark				
	Netflix	HBO Nordic	TV2 Play	Viaplay	TDC
European films on homepage	YES	YES	YES	YES	YES
European/National film section	NO	YES	YES	YES	YES
Search function for European films	NO	NO	YES	NO	YES
Recommandation for European films	YES	NO	YES	YES	NO
Special offers on European films	NO	NO	YES	NO	NO
Presence of European film trailers	YES	NO	NO	NO	NO

Art. 13: Obligation to promote by appropriate means production of and access to EU works

Means of prominence	France			
	Orange VoD	Sony Enter.	Univers Ciné	Canal Play
European films on homepage	YES	YES	YES	YES
European/National film section	YES	YES	YES	NO
Search function for European films	NO	NO	YES	NO
Recommandation for European films	NO	NO	YES	NO
Special offers on European films	NO	NO	NO	NO
Presence of European film trailers	YES	YES	YES	YES

Art. 13: Prominence - Share on homepage & trailers for EU/FR works

Means of prominence	Italy					
	Chili TV	Cubovision	Sky on demand	Mediaset Premium	My Movies	Rai Cinema
European films on homepage	YES	YES	YES	YES	YES	NO
European/National film section	NO	NO	NO	NO	NO	NO
Search function for European films	NO	NO	NO	NO	NO	NO
Recommandation for European films	NO	NO	NO	NO	NO	NO
Special offers on European films	NO	NO	NO	NO	NO	NO
Presence of European film trailers	NO	NO	NO	NO	NO	NO

Art. 13: Obligation to gradually promote production of and access to EU works

- EU films on homepage and EU/National film section are the means most employed
- Recommendation, Search function & Special offers not widespread

Findings & Indications drawn from sample results

- 1st National VoD providers in BE, EE, IT, NL, PL, SE have **less than 30% of our sample movies**

- **Big national players** in DE & DK and in a lesser extent FR, GB, SE & PL have a fair percentage of sample European **blockbuster movies** in their catalogues (financial resources of players → commercial argument for customers)

- Question of the importance of recentness and commercial success for EU movies in VoD catalogues?

- **Are Most « valuated » EU movies more expensive?** → Catalogue « fill-up » with less « valuable » (expensive) EU content by smaller players & expensive content for bigger players (telecom, pay-TV)

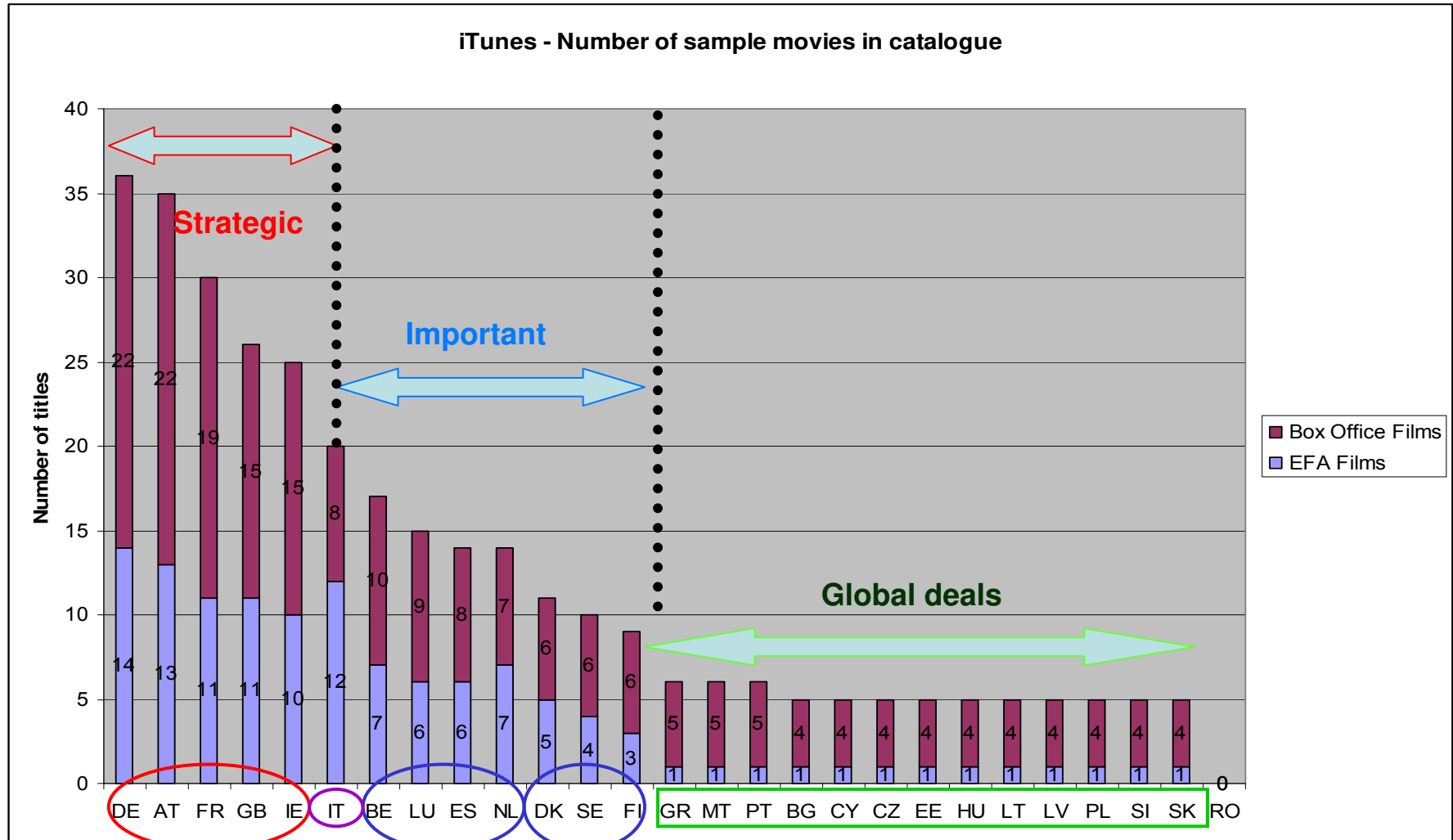
- European **blockbuster movies more predominant** in iTunes catalogues than EFA movies (*except IT*) → European global license deals for most valuable content (= meet customers tastes)?

➤ **Need to correlate results with national on-demand regulation and market figures**

➤ **Need of more answers** to questionnaire to improve analysis

- All assumptions made in this **analysis** are **limited to the extent of the sample** and need to be verified in a more exhaustive analysis → **no generalisation/extrapolation possible!**

PATTERNS OF iTUNES OFFERS



AVAILABILITY IN iTUNES STORES ACCORDING TO THE PROFILE OF THE FILMS

	Year	Production ¹	Movie title	iTunes (nb) ²	Admissions ¹		Gross ³ in \$ MIL
					Total EU 27	national	
Blockbusters (>\$200 M), GB productions and in English (more universal)	2012	GB / US	SKYFALL	26	44 464 388	15 945 446	1 109
	1997	GB / US	BEAN: THE ULTIMATE DISASTER MOVIE	26	24 610 209	4 588 253	232
	1997	GB	THE FULL MONTY	26	24 550 188	11 096 718	244
	2007	GB/FR/DE/US	MR. BEAN'S HOLIDAY	24	14 727 660	4 378 026	217
	1999	GB / US	NOTTING HILL	22	28 206 327	7 419 281	363
Recent EFA & blockbuster movies	2012	FR	TAKEN 2	17	10 440 956	2 904 902	376
	2012	FR / DE / AT	AMOUR	13	1 440 481	619 650	9,5 (4)
	2011	FR	INTOUCHABLES	12	39 775 583	21 414 629	351
	2008	GB	SLUMDOG MILLIONAIRE	12	16 667 974	5 820 652	191 (5)
	2011	DK/SE/FR/DE/IT	MELANCHOLIA	12	1 481 055	56 687	n.a.
	2008	IT	GOMORRA	10	3 358 122	1 747 859	35
	2009	DE / AT / FR / IT	DAS WEISSE BAND	9	2 337 311	668 825	2,4 (6)
2010	FR / DE / GB	THE GHOST WRITER	9	4 580 560	1 048 701	74	
11 EFA & 17 Blockbuster « Country-specific » movies (DE, AT, FR, IT, ES) – language or culture Importance of age (>5 years)	2001	ES / US	THE OTHERS	8	14 395 223	6 356 779	210
	2006	DE	DAS LEBEN DER ANDEREN	8	7 218 804	2 371 327	77
	1997	IT	LA VITA E BELLA	7	19 612 396	5 726 295	229
	2001	FR / DE	LE FABULEUX DESTIN D'AMELIE POULAIN	6	19 999 974	8 516 391	57,7 (7)
	2001	GB / US	BRIDGET JONES'S DIARY	5	29 029 836	9 723 791	172 (7)
	2008	FR	BIENVENUE CHEZ LES CH'TIS	5	25 511 247	20 488 339	164 (8)
	1997	FR	LE CINQUIÈME ÉLÉMENT	5	20 658 138	7 696 617	264
	2004	GB/US/FR/DE/IE	BRIDGET JONES: THE EDGE OF REASON	5	19 560 087	7 943 695	110 (7)
	2003	GB / US	LOVE ACTUALLY	5	15 460 165	7 543 045	245
	2003	GB / US	JOHNNY ENGLISH	5	13 778 649	4 041 542	157
	2000	GB / FR	BILLY ELLIOT	5	12 433 972	3 893 407	109
	2006	DE / ES / FR	PERFUME: THE STORY OF A MURDERER	5	11 047 765	5 589 217	132
	1999	ES / FR	TODO SOBRE MI MADRE	5	7 703 145	2 581 391	22 (9)
	1998	FR	LE DINER DE CONS	4	10 716 740	9 238 220	n.a.
	2005	FR / AT / DE / IT	CACHÉ	4	1 681 765	517 258	n.a.
	2002	FR / DE	ASTÉRIX & OBÉLIX : MISSION CLÉOPÂTRE	3	21 568 619	14 313 876	111
	2008	FR / DE / ES / IT	ASTÉRIX AUX JEUX OLYMPIQUES	3	13 502 542	6 812 378	83 (10)
2000	FR	TAXI 2	3	12 214 697	10 239 220	n.a.	
1996	DK/SE/FR/NL	BREAKING THE WAVES	3	298 608	2 980 848	7 (11)	
2004	DE/TR	GEGEN DIE WAND	3	791 141	1 619 814	n.a.	
2004	DE	(T)RAUMSCHIFF SURPRISE - PERIODE 1	2	10 372 090	9 150 736	80 (12)	
1999	FR / DE / IT	ASTÉRIX ET OBÉLIX CONTRE CÉSAR	2	20 735 290	8 745 213	n.a.	
2001	DE	DER SCHUH DES MANITU	2	13 905 986	11 719 160	81	
2004	FR / CH	LES CHORISTES	2	11 917 515	8 356 492	n.a.	
2002	ES	HABLE CON ELLA	2	6 763 943	1 364 009	50	
2003	DE	GOOD BYE, LENIN!	2	10 632 563	6 574 961	77	
2007	RO	4 LUNI, 3 SAPTAMANI SI 2 ZILE	2	1 064 364	89 339	n.a.	
1990	IT	PORTE APERTE	1	n.a.	n.a.	n.a.	
Mostly older EFA movies → « Niche » market ?	2006	FR	LES BRONZÉS 3: AMIS POUR LA VIE	0	10 797 463	10 223 008	n.a.
	1988	PL	KROTKI FILM O ZABIJANIU	0	n.a.	n.a.	n.a.
	1998	FR	TOPIO STIN OMICHLI	0	n.a.	n.a.	n.a.
	1990	GB	RIFF-RAFF	0	n.a.	n.a.	n.a.
	1992	IT / CH / FR	IL LADRO DI BAMBINI	0	n.a.	n.a.	n.a.
	1991	FR/RU	YPTA	0	n.a.	n.a.	n.a.
	1994	IT / FR / CH	LAMERICA	0	n.a.	n.a.	5
	1995	GB / ES / DE	LAND AND FREEDOM	0	n.a.	n.a.	n.a.
2000	DK/FR/SE/DE/NO/NL/IS	DANCER IN THE DARK	0	3 403 709	202 782	40	

Blockbuster
EFA

Means of prominence & price strategy in iTunes Stores

- In all 26 iTunes movie stores:

- Trailers presenting European films
- European films on homepages

-Means of prominence found in 10 iTunes stores (AT, BE, DE, ES, FR, GB, IE, IT, PL, NL):

- Special section of European and/or National films

- EU Content licensing strategy varies but almost same pricing strategy → fixed margins/retail prices?

Average Pricing for EFA films available in catalogues

	iTunes			
	Rental SD	Buy SD	Rental HD	Buy HD
AT	3,07 €	9,07 €	4,12 €	10,87 €
BE - French	3,16 €	9,99 €	4,16 €	12,26 €
BE - Flemish	3,16 €	9,99 €	4,16 €	12,26 €
BG	2,99 €	9,99 €	3,99 €	11,99 €
CY	2,99 €	9,99 €	3,99 €	11,99 €
CZ	2,99 €	9,99 €	3,99 €	11,99 €
DE	3,07 €	8,99 €	4,12 €	11,12 €
DK	kr 31,50	kr 109,00	kr 41,50	kr 151,50
EE	2,99 €	9,99 €	3,99 €	11,99 €
ES	3,16 €	8,32 €	4,49 €	10,99 €
FI	3,32 €	11,99 €	4,32 €	14,66 €
FR	3,12 €	8,72 €	4,19 €	11,12 €
GB	£2,79	£5,81	£3,99	£6,79
GR	2,99 €	9,99 €	3,99 €	11,99 €
HU	2,99 €	9,99 €	3,99 €	11,99 €
IE	3,32 €	7,99 €	4,37 €	8,43 €
IT	3,09 €	8,49 €	3,99 €	10,32 €
LT	2,99 €	9,99 €	3,99 €	11,99 €
LU	3,19 €	9,99 €	4,19 €	12,32 €
LV	2,99 €	9,99 €	3,99 €	11,99 €
MT	2,99 €	9,99 €	3,99 €	11,99 €
NL	3,16 €	9,13 €	4,16 €	11,28 €
PL	2,99 €	9,99 €	3,99 €	11,99 €
PT	2,99 €	9,99 €	3,99 €	11,99 €
RO				
SE	31,50 kr	109,00 kr	42,50 kr	151,50 kr
SI	2,99 €	9,99 €	3,99 €	11,99 €
SK	2,99 €	9,99 €	3,99 €	11,99 €

Average Pricing for Box-office films available in catalogues

	iTunes			
	Rental SD	Buy SD	Rental HD	Buy HD
AT	2,99 €	8,44 €	3,99 €	11,30 €
BE - French	2,99 €	7,32 €	3,99 €	9,99 €
BE - Flemish	2,99 €	7,32 €	3,99 €	9,99 €
BG	2,99 €	9,59 €	3,99 €	12,99 €
CY	2,99 €	9,99 €	3,99 €	13,66 €
CZ	2,99 €	9,59 €	3,99 €	12,99 €
DE	2,99 €	8,44 €	3,99 €	11,30 €
DK	kr 31,00	kr 102,33	kr 41,50	kr 149,00
EE	2,99 €	9,59 €	3,99 €	12,99 €
ES	2,99 €	8,88 €	3,99 €	12,13 €
FI	3,19 €	10,32 €	4,24 €	13,59 €
FR	2,99 €	8,39 €	3,99 €	10,52 €
GB	£2,49	£7,28	£4,10	£9,64
GR	2,99 €	9,99 €	3,99 €	13,24 €
HU	2,99 €	9,59 €	3,99 €	13,24 €
IE	2,99 €	9,46 €	3,99 €	12,49 €
IT	2,70 €	8,99 €	3,59 €	12,49 €
LT	2,99 €	9,59 €	3,99 €	12,99 €
LU	2,99 €	7,49 €	3,99 €	10,37 €
LV	2,99 €	9,59 €	3,99 €	12,99 €
MT	2,99 €	9,99 €	3,99 €	13,66 €
NL	2,99 €	7,70 €	3,99 €	10,49 €
PL	2,99 €	9,59 €	3,99 €	13,24 €
PT	2,99 €	9,99 €	3,99 €	13,66 €
RO				
SE	33,00 kr	102,33 kr	44,00 kr	149,00 kr
SI	2,99 €	9,59 €	3,99 €	12,99 €
SK	2,99 €	9,59 €	3,99 €	12,99 €

Microsoft's Xbox video marketplace - available in 12 EU countries



	Total of films	EFA Films	Blockbusters
GB	9 (18%)	2 (8%)	7 (28%)
IE	8 (16%)	2 (8%)	6 (24%)
ES	7 (14%)	1 (4%)	6 (24%)
AT	5 (10%)	2 (8%)	3 (12%)
FR	5 (10%)	1 (4%)	4 (16%)
BE	4 (8%)	1 (4%)	3 (12%)
DE	4 (8%)	1 (4%)	3 (12%)
DK	3 (6%)	1 (4%)	2 (8%)
FI	3 (6%)	1 (4%)	2 (8%)
IT	3 (6%)	1 (4%)	2 (8%)
NL	3 (6%)	1 (4%)	2 (8%)
SE	3 (6%)	1 (4%)	2 (8%)

→ Xbox considered as a distribution platform in LU.

→ Mostly catalogues of US studios

→ Low percentage of sample found, EU movies do not seem to be a priority in catalogue based on sample results

→ Less country-specific approach than Apple

→ Blockbusters more often found than EFAs

→ Only means of prominence of European films : trailers

→ Based on sample results, European movies do not constitute a large part of Xbox's movie catalogue. Could Xbox One be a « **game changer** » for European movies in catalogue ?

[Aim of Microsoft is to expand its presence in the living room through audiovisual content → EU blockbusters to expand reach and create an EU customer base - cater more to consumers tastes?]

AVAILABILITY OF FILMS IN XBOX OFFERS

	Year	Production origin ¹	Movie title	Xbox (nb)	Admissions ¹		Gross ³ in \$ MIL
					Total EU 27	national	
>2/3	2012	GB / US	SKYFALL	12	44 464 388	15 945 446	1 109
	1997	GB	THE FULL MONTY ²	12	24 550 188	11 096 718	244
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>1/3	1997	GB / US	BEAN: THE ULTIMATE DISASTER MOVIE	5	24 610 209	4 588 253	232
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	2008	GB	SLUMDOG MILLIONAIRE	1	16 667 974	5 820 652	191 (5)
	2009	DE / AT / FR / IT	DAS WEISSE BAND	1	2 337 311	668 825	2,4 (6)
	2000	GB / FR	BILLY ELLIOT	1	12 433 972	3 893 407	109
0	1998	FR	LE DINER DE CONS	1	10 716 740	9 238 220	n.a.
	2012	FR / DE / AT	AMOUR	0	1 440 481	619 650	9,5 (4)
	1990	IT	PORTE APERTE	0	n.a.	n.a.	n.a.
	1988	PL	KROTKI FILM O ZABIJANIU	0	n.a.	n.a.	n.a.
	1998	FR	TOPIO STIN OMICHLI	0	n.a.	n.a.	n.a.
	1990	GB	RIFF-RAFF	0	n.a.	n.a.	n.a.
	1992	IT / CH / FR	IL LADRO DI BAMBINI	0	n.a.	n.a.	n.a.
	1991	FR/RU	YPTA	0	n.a.	n.a.	n.a.
	1994	IT / FR / CH	LAMERICA	0	n.a.	n.a.	5
	1995	GB / ES / DE	LAND AND FREEDOM	0	n.a.	n.a.	n.a.
	2011	FR	INTOUCHABLES	0	39 775 583	21 414 629	351
	2001	GB / US	BRIDGET JONES'S DIARY	0	29 029 836	9 723 791	172 (7)
	2008	FR	BIENVENUE CHEZ LES CH'TIS	0	25 511 247	20 488 339	164 (8)
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	2000	FR	TAXI 2	0	12 214 697	10 239 220	n.a.
	2004	FR / CH	LES CHORISTES	0	11 917 515	8 356 492	n.a.
	2006	DE / ES / FR	PERFUME: THE STORY OF A MURDERER	0	11 047 765	5 589 217	132
	2006	FR	LES BRONZÉS 3: AMIS POUR LA VIE	0	10 797 463	10 223 008	n.a.
	2003	DE	GOOD BYE, LENIN!	0	10 632 563	6 574 961	77
	1999	ES / FR	TODO SOBRE MI MADRE	0	7 703 145	2 581 391	22 (9)
	2006	DE	DAS LEBEN DER ANDEREN	0	7 218 804	2 371 327	77
	2002	ES	HABLE CON ELLA	0	6 763 943	1 364 009	50
2010	FR / DE / GB	THE GHOST WRITER	0	4 580 560	1 048 701	74	
2000	DK/FR/SE/DE/NO	DANCER IN THE DARK	0	3 403 709	202 782	40	
2008	IT	GOMORRA	0	3 358 122	1 747 859	35	
2005	FR / AT / DE / IT	CACHÉ	0	1 681 765	517 258	n.a.	
2011	DK/SE/FR/DE/IT	MELANCHOLIA	0	1 481 055	56 687	n.a.	
2007	RO	4 LUNI, 3 SAPTAMANI SI 2 ZILE	0	1 064 364	89 339	n.a.	
2004	DE/TR	GEGEN DIE WAND	0	791 141	1 619 814	n.a.	
1996	DK/SE/FR/NL	BREAKING THE WAVES	0	298 608	2 980 848	7 (11)	

Blockbuster

EFA

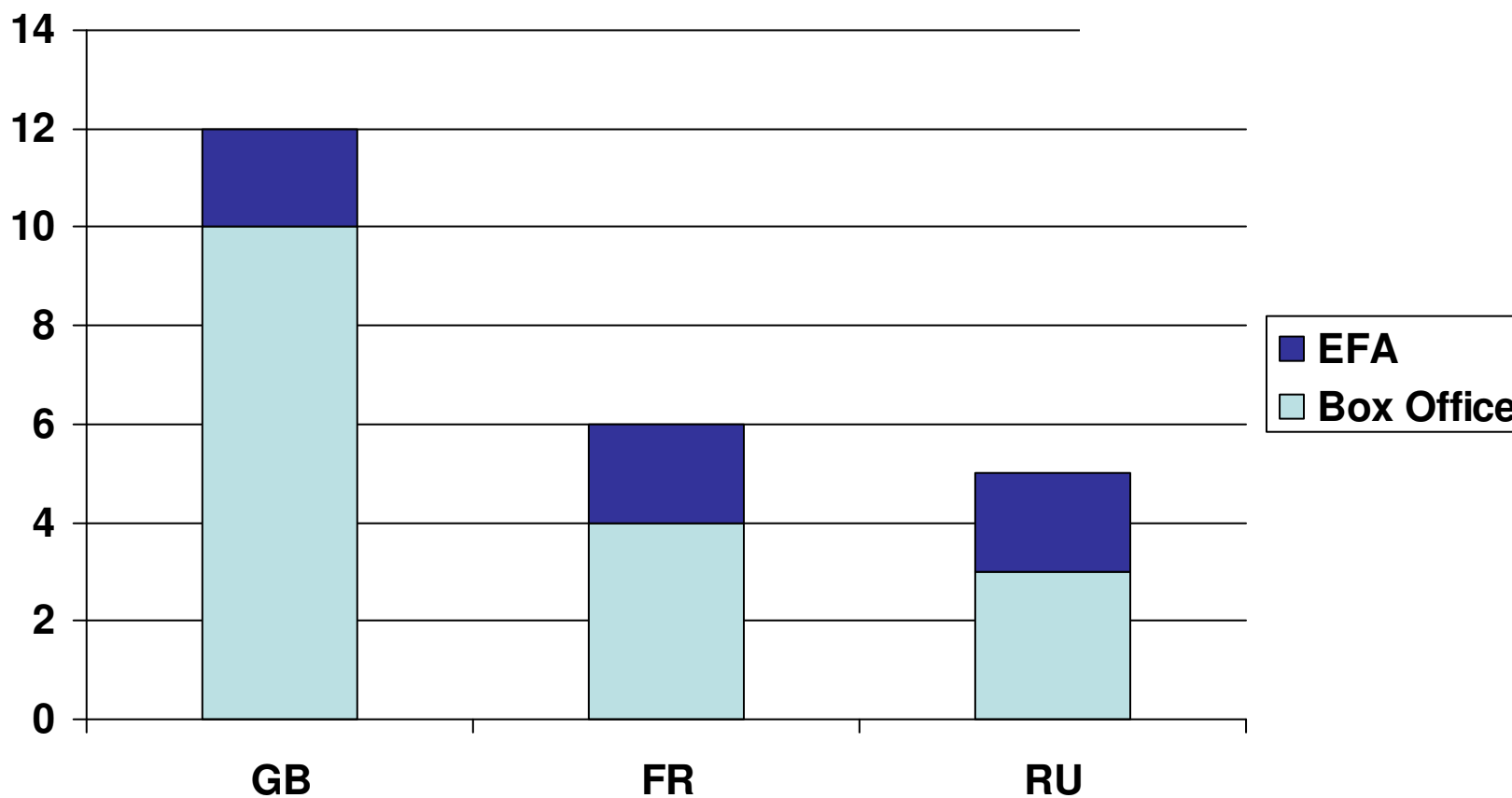


→ Only one « true » EFA movie (& 2 EFA/blockbusters)

→ European blockbusters dominate

→ Findings of our sample in line with Xbox's position as an electronic distribution platform for US studios

AVAILABILITY OF FILMS FROM THE SAMPLE IN GOOGLE PLAY CATALOGUES



WHAT PLACE ON THE MARKET FOR SERVICES WITH NATIONAL AND EUROPEAN CATALOGUES ?

- In the last years, various online VoD services with national or European catalogues were launched with public national or European support
- They have no or limited access to the platforms (either Internet platforms such as iTunes, Xbox Video, YouTube, Dailymotion or TV distribution platforms cable, IPTV, DTT)

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PROVISORY CONCLUSIONS

- As for the implementation of art. 13, it is probably more important to monitor VoD services than catch up TV services
- The comprehensive analysis of VoD catalogues is not possible without the cooperation of providers
- The analysis of the availability of a sample of 50 leading European films illustrates the relatively low presence of those films in catalogues
- The fact that iTunes Stores appears to be the best performers in terms of providing European film may be seen as a paradox. But :
 - iTunes Store has a long experience with the long tail in music and is aware of the importance of local titles and of niche markets
 - iTunes Store is the leading pan-European player : it can certainly obtain better commercial conditions
 - > risk of iTunes adopting a strategy of exclusivity ?
- Access to the TV distribution platforms is key issue for independent VoD services



Thank you !

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