THE ENLARGEMENT OF THE MAVISE DATABASE TO ON-DEMAND AUDIOVISUAL SERVICES

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

COUNCIL OF EUROPE
CONSEIL DE L'EUROPE

WHY IS IT SO DIFFICULT TO GRASP THE ON DEMAND AUDIOVISUAL MARKET?

- Multiplicity of technical solutions
- Multiplicity of stakeholders and strategies
- Heterogeneity of national landscapes / audiovisual policies
- Heterogeneity of interpretations of the definitions of the AVMS Directive in national implementation
- Heterogeneity of concepts
- Lack of transparency and difficult to provide comprehensive metrics
    - Comprehensive register of services available in Europe
    - Data on catalogues
    - Data on number of transactions or subscriptions
    - Data on the breakdown of adspend on Internet between categories of services
    - Data on revenues of services (advertising, purchase, rental, subscription)
    - Data the success of works and on their circulation
    - Data on market shares
    - Data on international trade in AVMS

THE EUROPEAN AUDIOVISUAL OBSERVATORY HAS ENLARGED THE MAVISE DATABASE TO ON-DEMAND AUDIOVISUAL SERVICES :
MORE THAN 3100 ODAS IDENTIFIED

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

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Your channel selection

Previously viewed:

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

European Commission

THE MAVISE DATABASE : OVERVIEW

- **Project and database development funded by the European Commission, DG Communication from 2007-2012**

- 10 600 TV channels - almost 4 000 local/ regional - 1 460 are public channels
- 8 600 established in the European Union
- 40 European countries plus 800 channels from the rest of the world

- **New framework contract (2012-2016) with DG COM of the European Commission**
- The Commission does not support anymore the database as such, but new contract with DG COM make possible the data collection for update of the TV channels

  Data collection on on-demand services funded by European commission DG CONNECT
- Enlarged version with all OBS Member States and data on on-demand audiovisual services launched in May 2013

WHAT INFORMATION ARE COLLECTED ?

- Audiovisual services : television channels and on-demand audiovisual services (concept, genre, url, language, number of subscribers)

- identification of the company providing the service (address, url)
  - ***In various occasions, the name of the company providing the service is not clearly identified on the website or on the distribution platforms (such as YouTube, XboX, iTunes « Studios and networks » catalogues,…)***

- Identification of the affiliation of the company to a media group

- Identification of the platforms of distribution (terrestrial, cable, satellite, IPTV, mobile phone, open Internet, UGC platforms, Apps Stores)
  - ***Difficulties in identifying the country of establishment of Apps stores***

- Identification of the licence / registration by a NRA
  - ***Some NRA do not provide list or provide non comprehensive list***

- Identification of the country of establishment (using lists of the NRA or address of the company)

- Identification of the main targeted countries

MULTIPLE POSSIBILITIES OF SEARCH

Individual files

- By country
- By name of service (TV or ODAVS)
- By name of company

Lists

- By NRA
- By country of establishment
- By country of reception
- By companies established in a country

+ *Various advanced search possibilities*

SOURCES USED FOR THE CENSUS OF ON-DEMAND AUDIOVISUAL SERVICES

- Lists provided by NRA following a letter forwarded by EPRA Secretariat
  (23 answers for 41 territories)

- Lists provided by some national film agencies, national video associations, organisations providing labels for legal VoD services,…

- Systematic analysis of TV distribution platforms' line-up

- Announcements in trade press and specialised newsletters

- National market reports

- Comscore Video Metrix line-up

- Browsing on the Internet

DEFINITION OF THE ON-DEMAND AUDIOVISUAL SERVICES

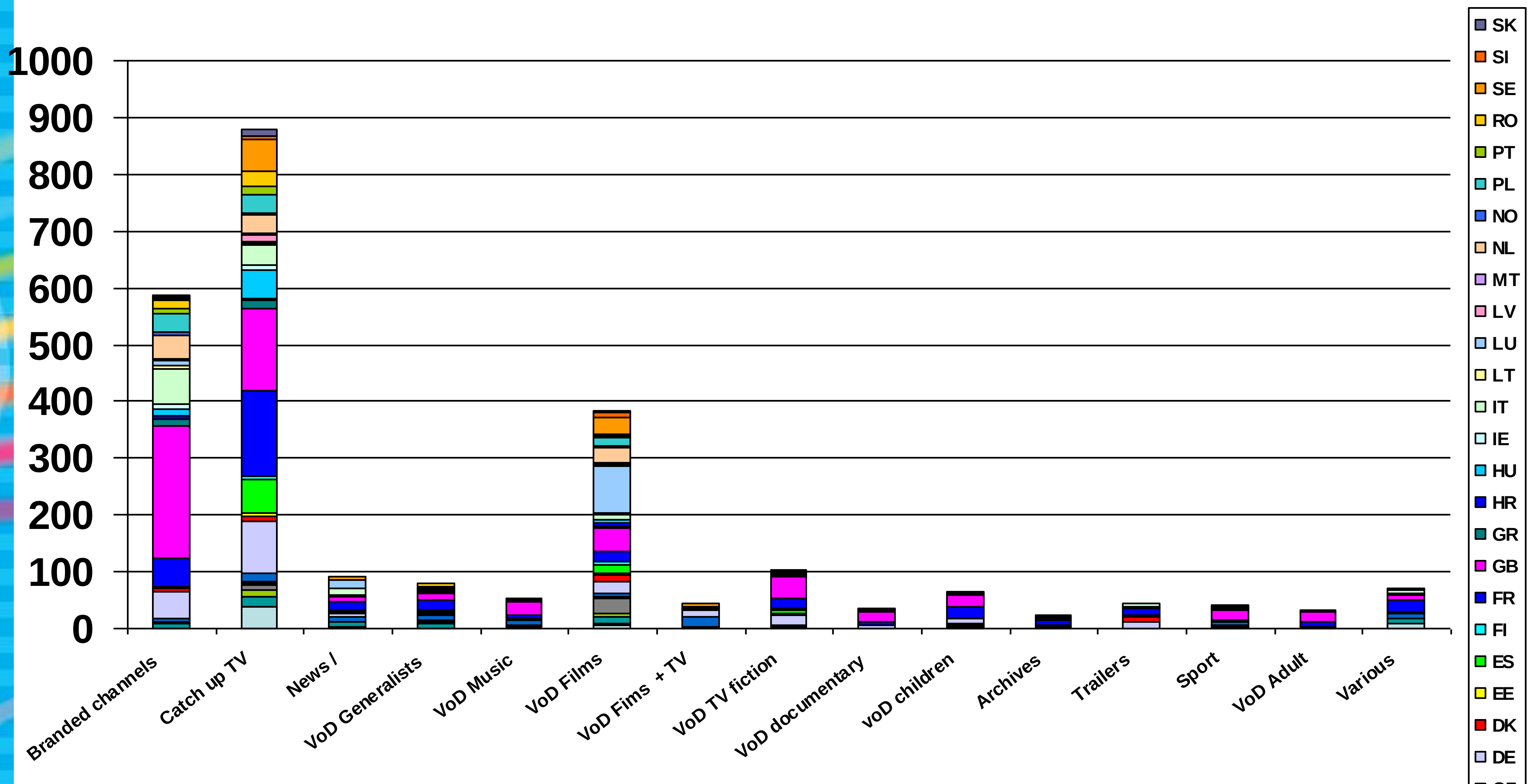
- We have tried to follow the 7 criteria of the AVMS Directive but we do not claim to provide any interpretation of the law...

- … and we have adopted an open approach. We have included:
  - broadcasters' branded channels on YouTube / DailyMotion
  - individual « studios and networks » catalogues on iTunes and XboX
  - video websites of newspapers
  - sites of film trailers
  - some video websites that NRA will consider as promotion and not really a service
  - services established outside Europe but which target mainly European countries

- We register as different services the various linguistic/national catalogues of a same brand (e.g. Itunes Stores : 1 for the Luxembourg authorities / 77 in MAVISE)

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

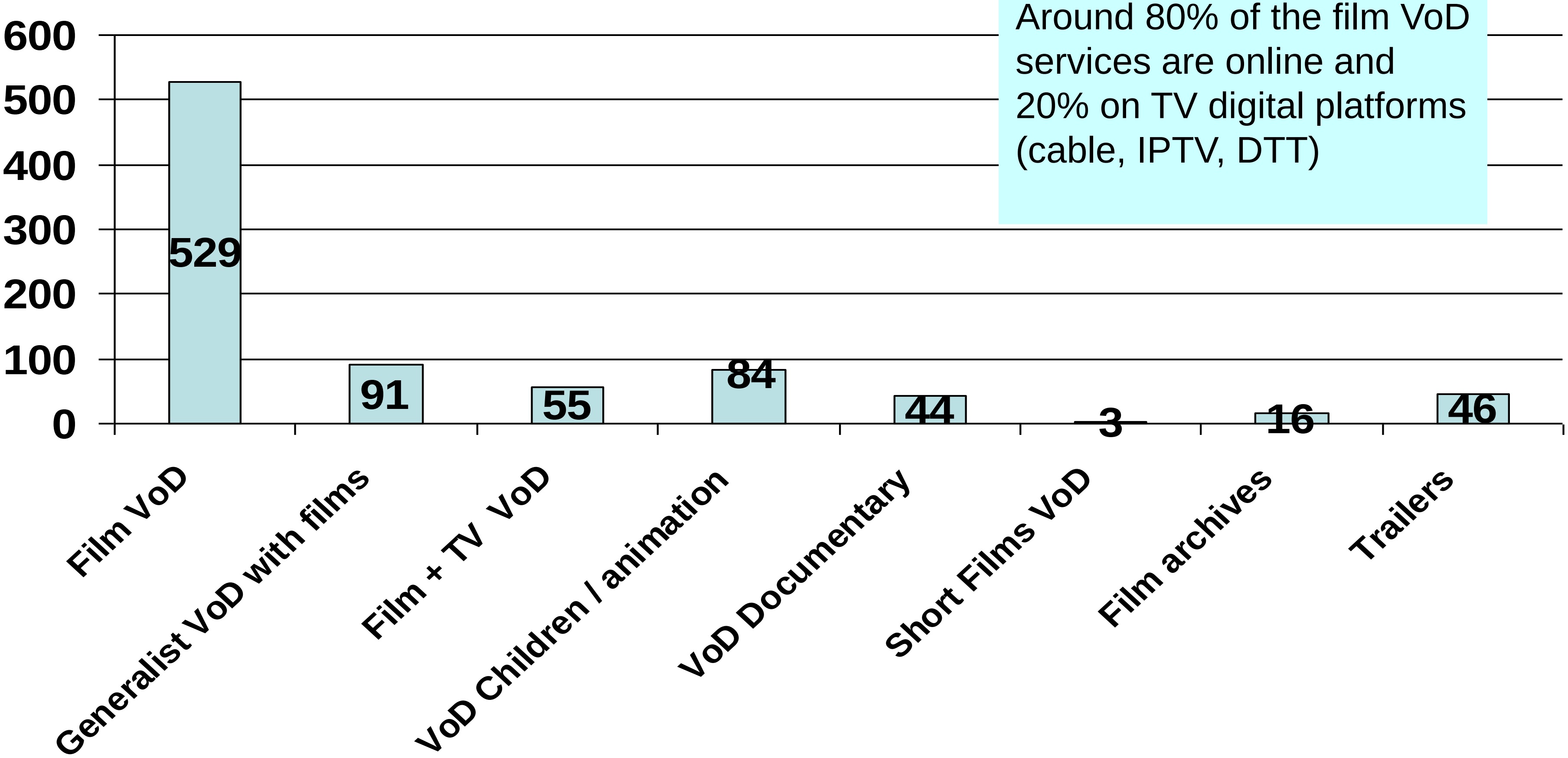
Source : European Audiovisual Observatory / MAVISE database



EXAMPLES OF DISCREPANCIES BETWEEN DATA FROM AUTHORITIES AND MAVISE DATA

	Authorities	EPRA questionnaire	MAVISE
	Spring 2013	Sep-13	Sep-13
AT	93	121	117
BE (CFR)	25	23	35
BE (VLG)	28	52	45
BG	10	15	24
CY	12	2	14
ES	36		96
GB	208	206	646
HR	6		16
HU	50		73
IE	11		24
IT		4	146
LT	3	3	14
LU	5	6	111
LV		3	20
MT	2		7
NL		20	116
PL	33	24	111
RO	6	7	50
SE	52	41	153
SI	3		20
SK	23	45	49

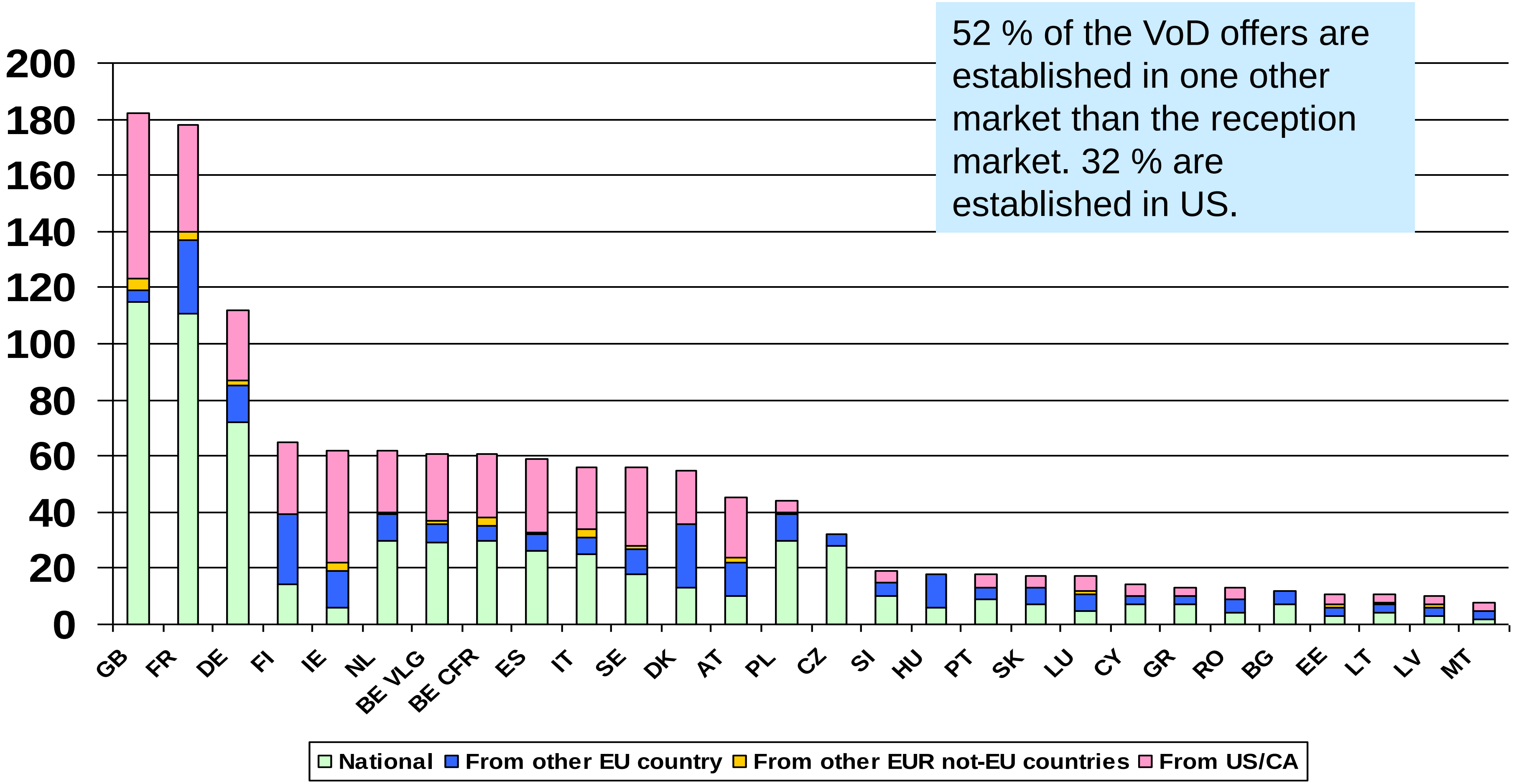
ON-DEMAND AUDIOVISUAL SERVICES RELATED TO FILMS IN THE MAVISE DATABASE (May 2013)



Around 80% of the film VoD services are online and 20% on TV digital platforms (cable, IPTV, DTT)

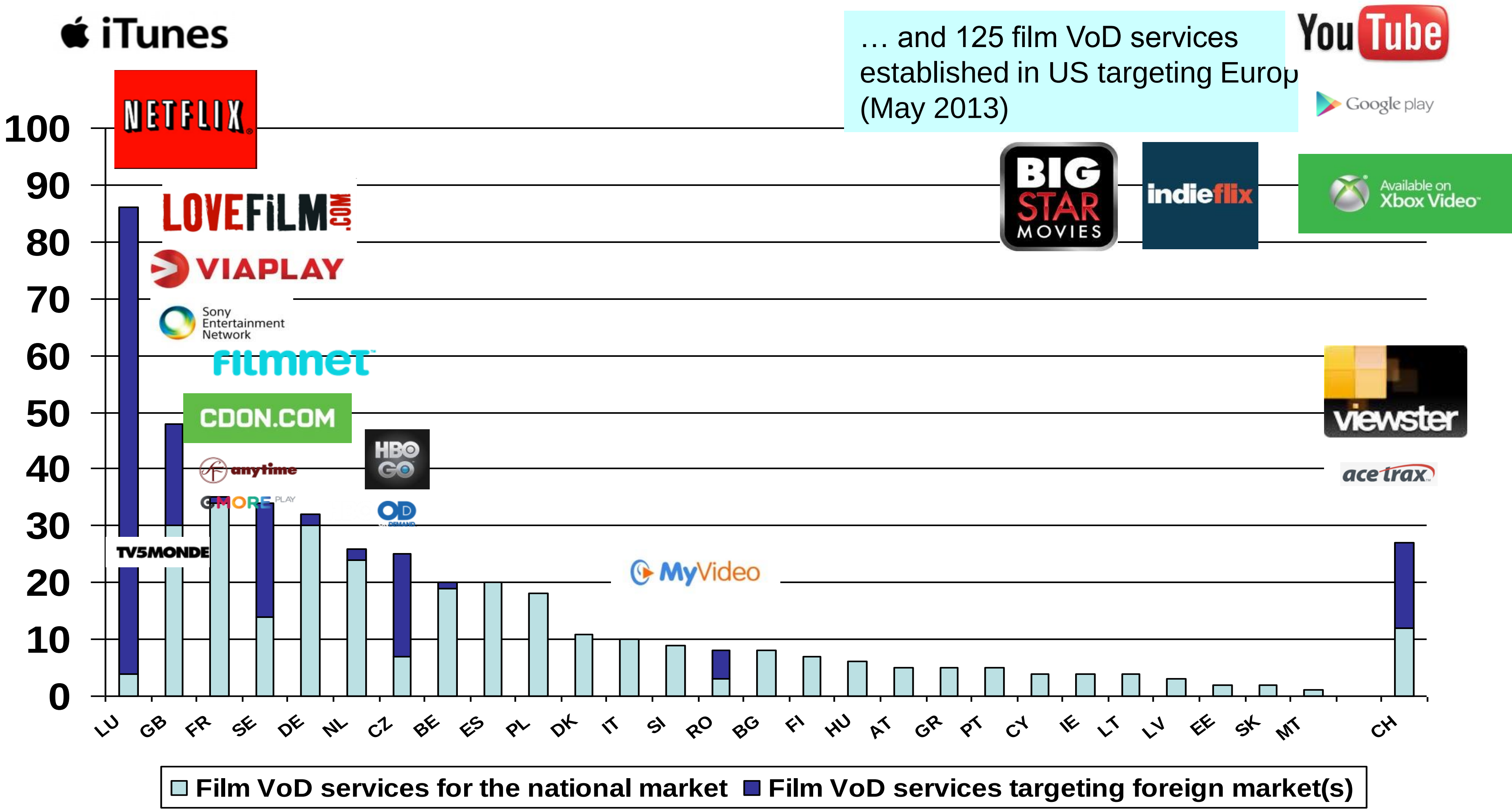
NUMBER OF VOD SERVICES (ALL GENRES EXCEPT ADULTS) AVAILABLE IN THE EU COUNTRIES – April 2013

Source: European Audiovisual Observatory / MAVISE database



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

Source: European Audiovisual Observatory – MAVISE database



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

THE LEADING ADULT ODAVS ARE ESTABLISHED IN US

Table 77: Top 25 Internet Properties Ranked by Viewer Hours in 2010

Internet Property Name	Internet Property Type	2010 Viewer Hours (Millions)	% of Total Internet Video Audience
Google Sites	Clips & User Generated Content	1718.2	25.5%
PORNHUB.COM	Pornography	726.0	10.8%
XHAMSTER.COM	Pornography	553.6	8.2%
XVIDEOS.COM	Pornography	536.5	8.0%
REDTUBE.COM	Pornography	292.5	4.3%
YOUJIZZ.COM	Pornography	233.0	3.5%
MEGAVIDEO.COM	Clips & User Generated Content	231.7	3.4%
BBC Sites	TV Catch-up & VOD Service	190.5	2.8%
TUBE8.COM	Pornography	156.3	2.3%
YOUPORN.COM	Pornography	117.9	1.7%
SPANKWIRE.COM	Pornography	109.3	1.6%
TNAFLIX.COM	Pornography	102.9	1.5%
KEEZMOVIES.COM	Pornography	88.0	1.3%
EMPFLIX.COM	Pornography	82.7	1.2%
VEVO	Music Videos	58.8	0.87%
Break Media Network	Clips & User Generated Content	44.7	0.66%
DAILYMOTION.COM	Clips & User Generated Content	39.4	0.58%
FACEBOOK.COM	Clips & User Generated Content	35.0	0.52%
HARDSEXTUBE.COM	Pornography	31.2	0.46%
FLASHVIDEOTHEATER.COM	Pornography	30.2	0.45%
JIZZHUT.COM	Pornography	25.2	0.37%
Sky Sites	TV Catch-up & VOD Service	20.4	0.30%
BOYSFOOD.COM	Pornography	20.3	0.30%
Microsoft Sites	TV Catch-up & VOD Service	17.8	0.26%
PORNSTARCLUB.COM	Pornography	17.3	0.26%
	Total Top 25 Properties:	**5479.3**	**81.3%**
	Total Other:	**1258.7**	**18.7%**

Around 50 % of Internet Video Audience in UK

MONITORING THE APPS FOR SMART TV SETS

- Smart TV App market nascent and in development (content deals ongoing)

  ➔ Competition for video content through deals with broadcasters and OTT/VoD providers for their Apps (**differentiation**)

- 3 levels of Smart TV Video Apps distribution deals:

  ➔ World-wide App deals (BBC World, TV5 Monde)

  ➔ European App deals (Eurosport Player)

  ➔ Country-specific App deals (BBC iPlayer, MyTF1VoD, Maxdome)

  [Access to a Premium VoD service or catch-up TV App often on a national level]

- Complex and fragmented ecosystem, deals are confidential, little communication
- In general, some premium VoD Apps per country & Video Apps with lesser quality content (therefore number of Video Apps may seem inflated)

  ➔ Mostly 2-6 « Premium Apps » (Broadcaster Catch-up or Premium VoD catalogue: e.g. BBC iPlayer, Netflix, Maxdome, MyTF1VoD, wuaki.tv, ChiliTV, RTVE a la carta, …) per player/country

EXAMPLE : TV Apps AVAILABLE ON SAMSUNG SMART TV

Samsung Smart TV App Stores in Europe
Numbger of VoD Apps

	"Premium" Apps	Total Apps*
AT	4	26
BE	4	16
BG	2	17
CY	2	18
CZ	4	22
DE	5	33
DK	4	16
EE	2	16
ES	6	27
FI	4	17
FR	7	30
GB	8	27
GR	2	18
HR	1	13
HU	3	24
IE		
IT	4	25
LT	1	14
LU		
LV	2	17
MT		
NL	6	18
PL	6	27
PT	3	27
RO	6	37
SE	5	15
SI	2	16
SK	3	12

*: Samsung does only allow for certain of its Smart TV App stores a detailed research. For most of them, only the most popular apps are shown therefore, data may be incomplete.

No local Smart TV App store

➔ National distribution licenses for broadcasters catch-up + OTT & VoD providers Apps

➔ Global European distribution deals for « generic » video Apps (of lesser interest)

« Premium Apps »:

-DE: Maxdome, Viewster, Kinderkino, Welt der Wunder

-ES: RTVE.es a la carta, Yomvi/Canal+, Antena3

-FR: MyTF1VoD, Canal+ à la demande, Cinémas à la demande, France TV, FilmoTV

-GB: BBC iPlayer, Netflix, blinkbox, LOVEFiLM, iTV Player, 4oD, Demand 5

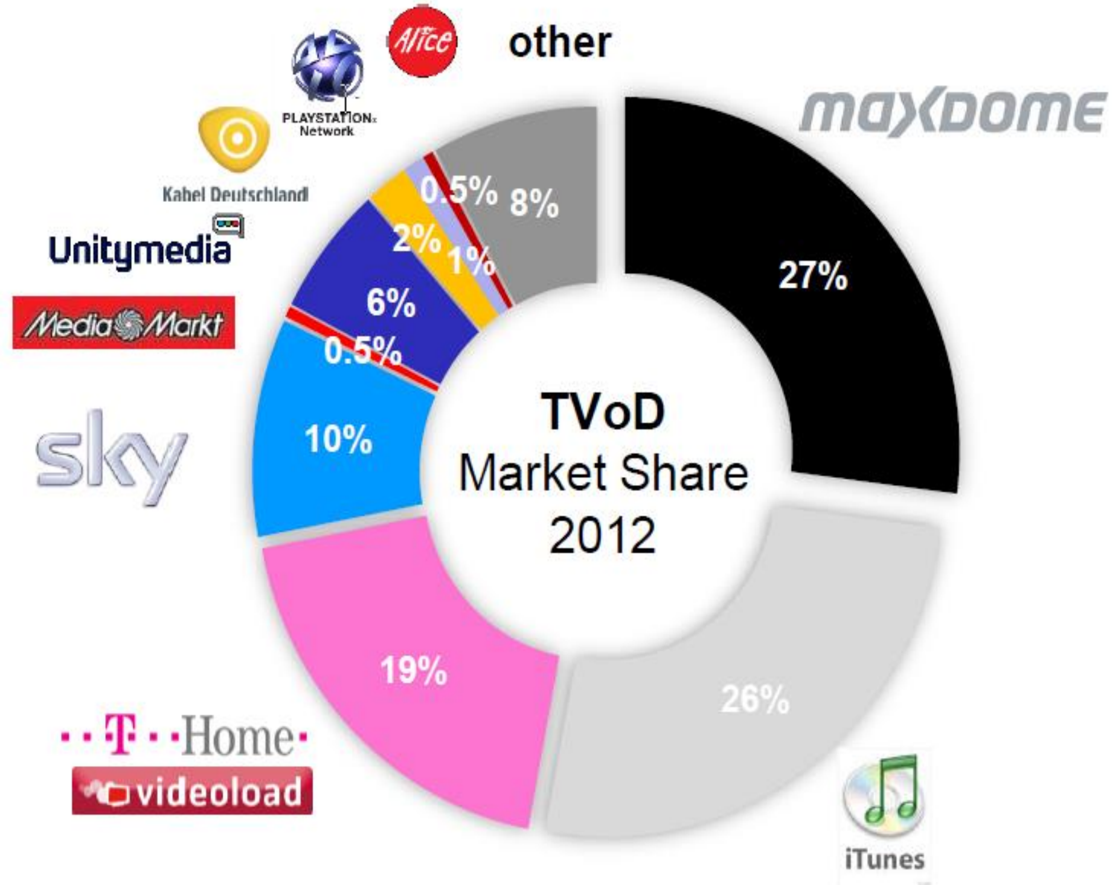
-IT: Cubovision, ChiliTV, Premium Play, FlopTV

-DK, FI, SE: SF Anytime, Viaplay, Netflix, HBO

-NL: Ximon, Pathé Thuis, SBS6

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



CONCERNS ON DIGITAL TRANSPARENCY HAS NOW REACHED HOLLYWOOD

***New York Times*, 15 September 2013**

A lack of data as movie watching shifts to digital

LOS ANGELES

On-demand viewing takes off, unaccompanied by statistics on success

BY MICHAEL CIEPLY

The movie industry is whooshing toward its digital future, but some players are worried about getting stuck in an informational void along the way.

The business has long used box-office numbers, which are publicly sliced and diced ad infinitum; and, similarly, disc sales and rentals have been monitored for years by the Rentrak data company and others.

But as consumers shift to new channels like Netflix and Amazon.com, there are no generally available industrywide data on the digital performance of individual movies.

While the studios get some information, it is not widely shared with filmmakers, agencies or the public. And those who hold the data have a distinct advantage when it comes to making deals or deciding which movies to back and what to spend on them.

By and large, public reports of digital performance are currently limited to a handful of films, or they simply report rankings without numbers. For the week ended Sept. 1, for instance, Rentrak's public listing showed "The Great Gatsby" to be the top performing on-demand film as reported by its participating services, but it offered no statistics.

WARNER BROTHERS PICTURES

A scene from "The Great Gatsby," which Rentrak said was the top performing on-demand film for a recent week. It gave no figures.

In an address at the Toronto International Film Festival last week, Liesl Copland, a digital media expert from the William Morris Endeavor Entertainment agency, told a small group of documentary filmmakers about this large, if barely visible, problem.

Movies tumble into "analytic black holes" when they are viewed on subscription services like Netflix, on-demand providers like the cable companies and iTunes, or an advertising-driven distributor like SnagFilms, she said.

"Reporting hasn't evolved with the rapidly increasing viewership patterns," Ms. Copland noted. "There is still no uniform reporting system that aggregates all data on, say, a film or documentary across all of its platforms."

This was not some data geek's plea for more, more, more. A former Netflix executive who now helps package and sell films for one of Hollywood's largest agencies, Ms. Copland comes to her topic with an insider's sense of both the problems and the possibilities in movie data-sharing. In her current role, she desperately wants to know more about the digital audience, whose behavior is now crucial to structuring deals and advising clients as to whether a particular project will fly.

"There is still no uniform reporting system that aggregates all data on, say, a film or documentary across all of its platforms."

She posited that access to shared data might result in "richer content and more engaged audiences" and, of course, more deal-making leverage for agents.

Digital distributors, she pointed out, may know infinitely more about their customers than studios could glean from their box-office analytics, even when bolstered by focus groups, exit polls, prerelease tracking interviews and close monitoring of social media.

It is no trick for a subscription or on-demand movie service to figure out what you like, when you like to watch it, how much you are willing to pay, and even whether you are committing digital "adultery" — i.e., sneaking a peak at a film or show, though you have promised to watch it with a friend.

In making decisions about whether to back a series like "House of Cards," Ms. Copland reminded her listeners, Netflix relied heavily on its huge bank of largely private information.

In truth, on-demand distributors share a great deal of data with studios from which they have purchased films. For the last several years, moreover, the studios, large and small, have been sharing title-by-title information about digital downloads with one another via an arrangement with Rentrak, which collecus the data and circulates them among about 170 entertainment company clients.

The studios also receive reports with some information on the streaming of individual titles from the NPD Group, another data company. But detailed streaming data are not routinely shared with filmmakers, agencies or news organizations.

Bruce Goerlich, Rentrak's chief research officer, noted that the wall around digital performance information is simply an extension of confidentiality strictures that have long surrounded video performance numbers.

"Measurement can equal monetization can equal a fight," he said of the entertainment industry's tendency to conceal data.

Mr. Goerlich, who spoke by telephone last week, seconded what Ronald J. Sanders, the president of worldwide home entertainment distribution at Warner Brothers, had to say about the public availability of box-office numbers (which are also compiled under an industry arrangement with Rentrak, then distributed to the news media and others), compared with the digital numbers.

"There's less consumer interest in it," Mr. Sanders said of the home entertainment numbers. If the general public were more interested in on-demand performance, he said, there would probably "be a stronger push to make it available."

But there is plenty of industry interest. According to Digital Entertainment Group, which monitors home entertainment spending, revenue from digital delivery of films and television shows in the United States was more than $3 billion for the first six months of 2013, up 24.1 percent from about $2.5 billion in the first half of last year. The growth rate promises a moment when digital revenue from movies and shows will rival the relatively flat North American motion picture box office, which was about $10.8 billion 2012.

Recently, the Motion Picture Association of America identified 95 services providing digital access to films and television shows in the United States, up from fewer than 20 in 2006.

But what is actually happening to individual films on those services? "I can still only guess," said Ms. Copland.

Pointedly, Ms. Copland delivered her Toronto address — "Digital On Demand: Show Us the Numbers" — to documentary filmmakers. That is because documentarians, whose films rarely perform well at the box office but often have a vibrant digital life, might gain the most from any immediate move toward digital transparency.

Still, documentary makers, a feisty but fragile group, lack the muscle to realize one of Ms. Copland's more radical proposals: the marking of every film with a bar-code-like identifier that would then be tracked through every viewing in a way that is readily transparent to interested observers like herself.

(The film industry already tags many of its films, but public availability of the resulting information is another matter.)

That kind of change might have to be forced, she theorizes, by the Hollywood guilds, which are now preparing for a round of contract negotiations in which digital issues — of a kind that brought the film industry to a halt during the hard-fought writers' strike of 2007 — will be central.

"Transparency could have a watershed moment in those negotiations," Ms. Copland suggested, if studios could be boxed into demanding, and disseminating, more information from the digital platforms.

CONCLUSIONS

- Film VoD services have a proeminent place in the online ODAVS universe and in the on-demand offers of TV distribution platforms > priority for reporting on the implementation of Art. 13 ?
- OTT services are growing in importance but operators of platforms are fighting back with « On the go formula » and hybrid set-top boxes
- Access of European films to the catalogues of leading US owned VoD services is certainly an issue
- Access of independent services to TV distribution platforms remains a problem: traditional gatekeepers are still there and new gatekeepers emerge
- Emergence of services established in "ease of doing business countries" and outside the EU creates a new challenge for the implementation of the AVMS Directive and for funding systems based on taxation of distributors revenues
- Role of the NRA in the transparency of the VoD market ?

NEXT TO COME…

- Hearing on Art.13, organised by the European Commission (18 November 2014)

- The European Audiovisual Observatory will present preliminary results of the analysis of availability of 50 leading European films on VoD services in Europe (Study in collaboration with the EFARN network).

THANK YOU !

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