

Update on VOD markets and catalogues

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A presentation
of the European Audiovisual Observatory

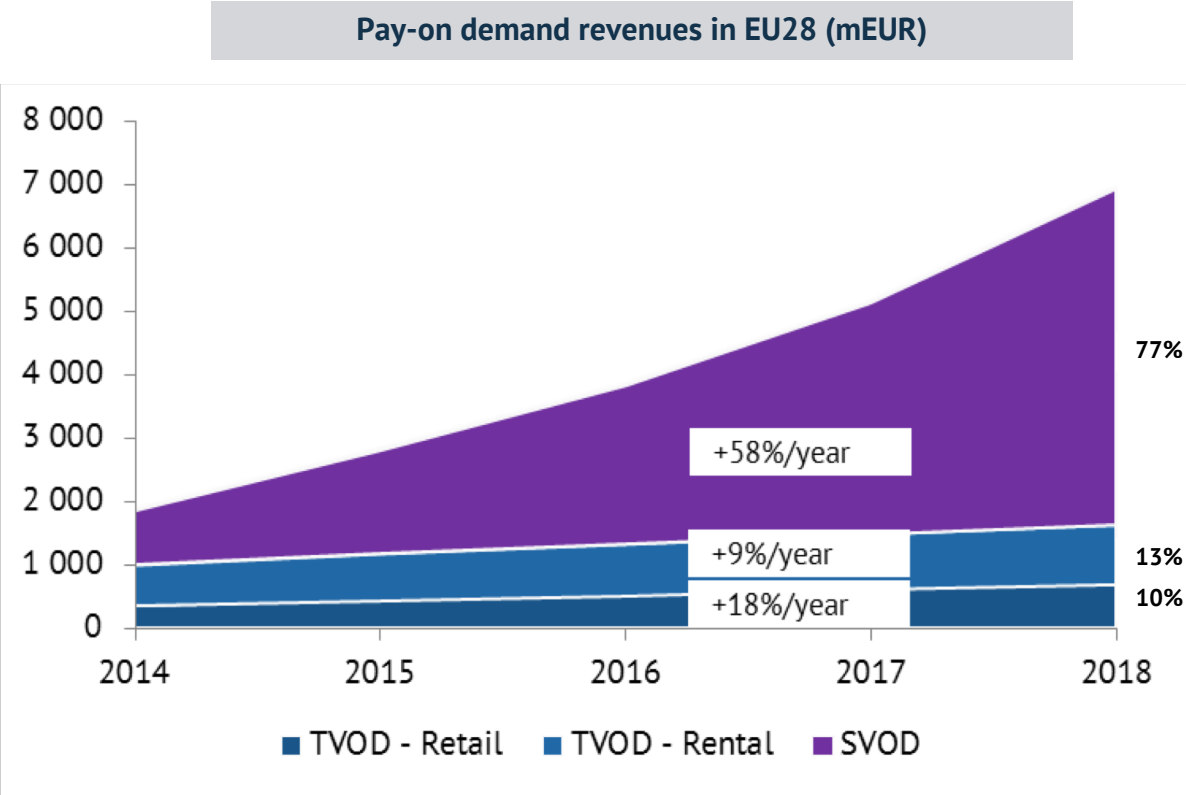


- ❑ **Update on market data**
- ❑ **VOD catalogues: structure, origin, links with cinema releases**
- ❑ **Visibility of audiovisual works on (T)VOD**

UPDATE ON MARKET DATA

Pay-on demand growth by segment

❑ SVOD, main segment of pay-on-demand, in value and growth.

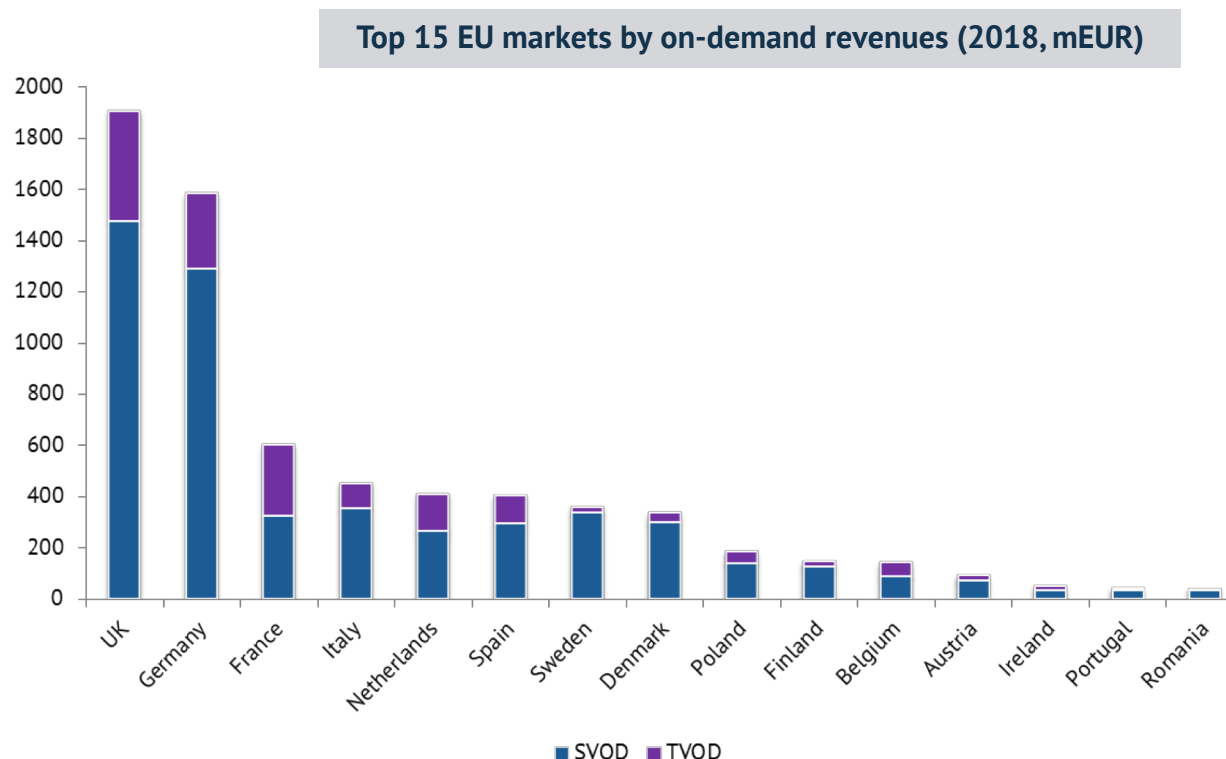


Source: Ampere Analysis

SVOD includes only OTT SVOD

Pay-on demand growth by segment

- ❑ UK, Germany and France account for 59% of the EU Pay On-demand market
- ❑ Share of SVOD significantly higher than on average in Sweden, Denmark, Romania, Finland



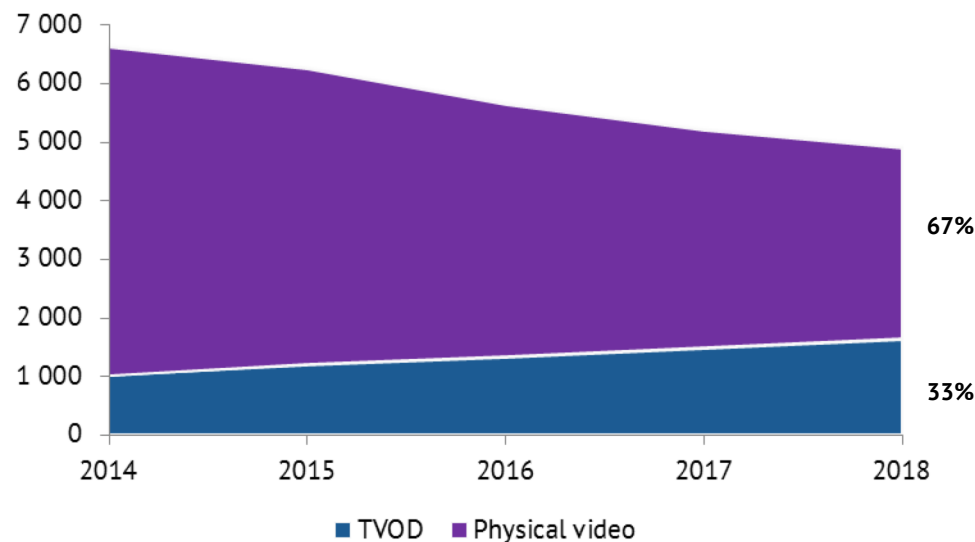
Source: Ampere Analysis

SVOD includes only OTT SVOD

Pay-on demand segments in context

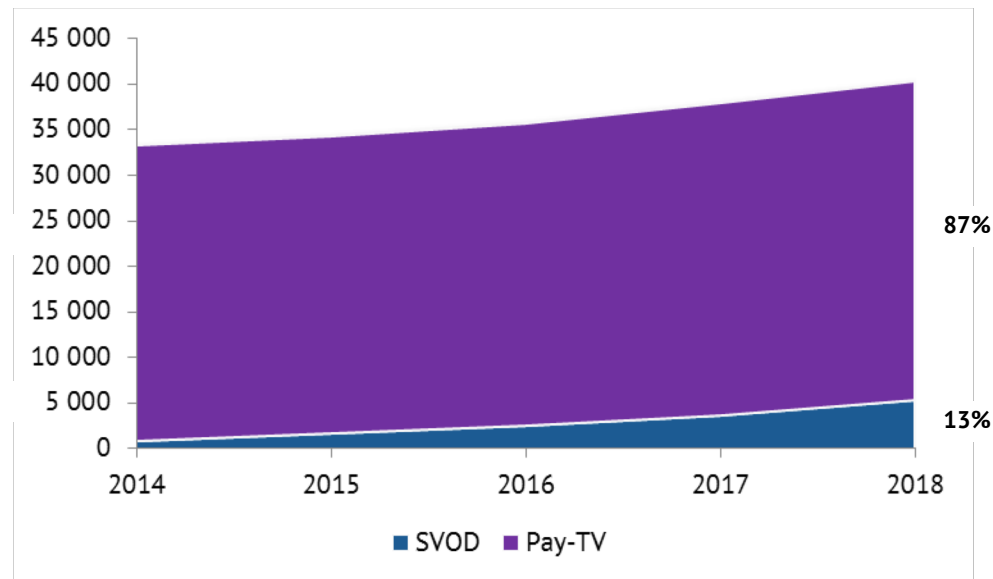
- ❑ DVD still bigger than TVOD
- ❑ SVOD still a small fraction of pay-services

Home video entertainment revenues (mEUR)



Source: Ampere Analysis

Pay-services revenues (mEUR)

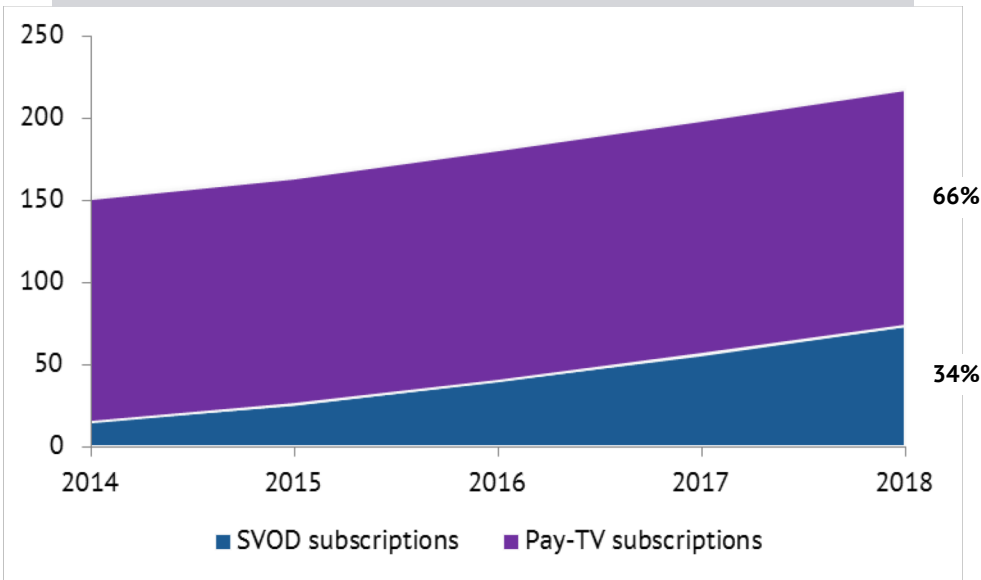


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SVOD includes only OTT SVOD

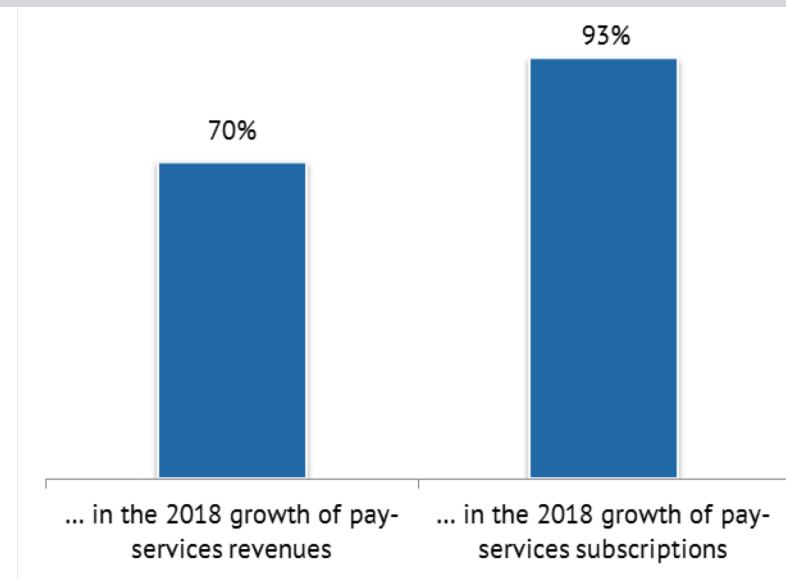
- ❑ ... but over 1/3 of subscriptions for SVOD
- ❑ SVOD the main driver of the growth of pay-services

Pay-TV vs SVOD (subscriptions)



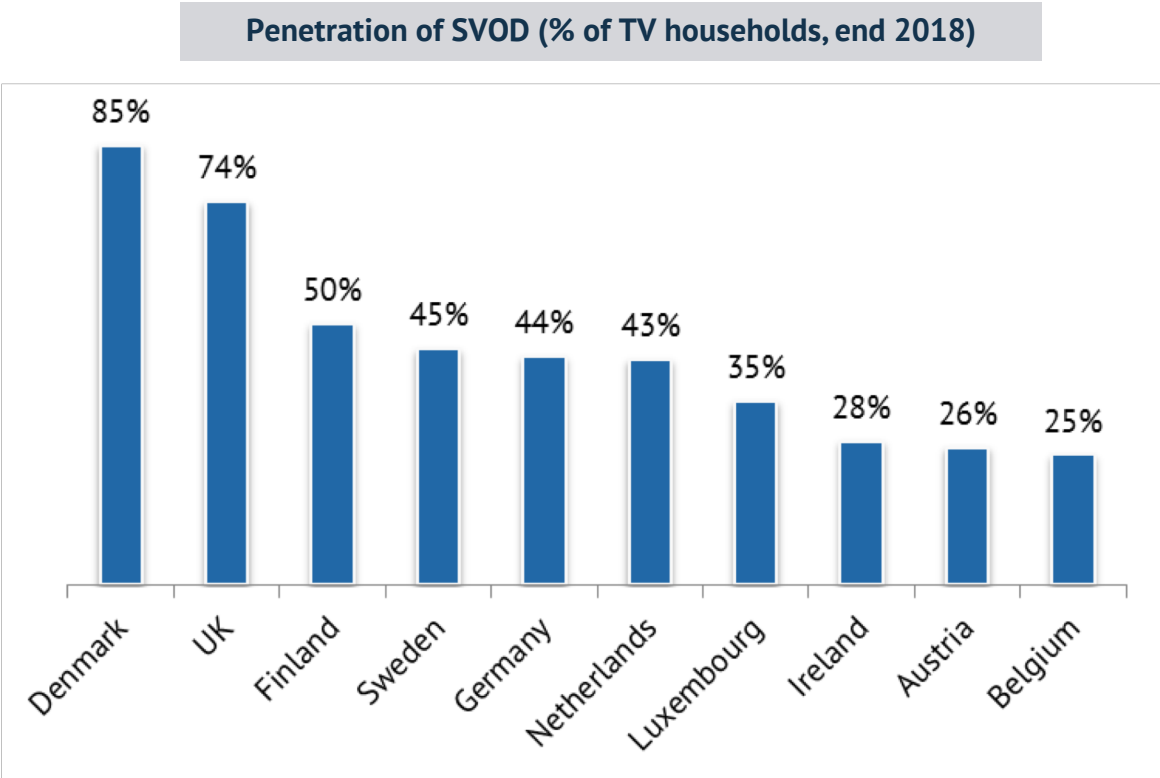
Source: Ampere Analysis

Share of SVOD ...



Source: Ampere Analysis

❑ High penetration rates of SVOD in Scandinavia, UK, Germany, Netherlands

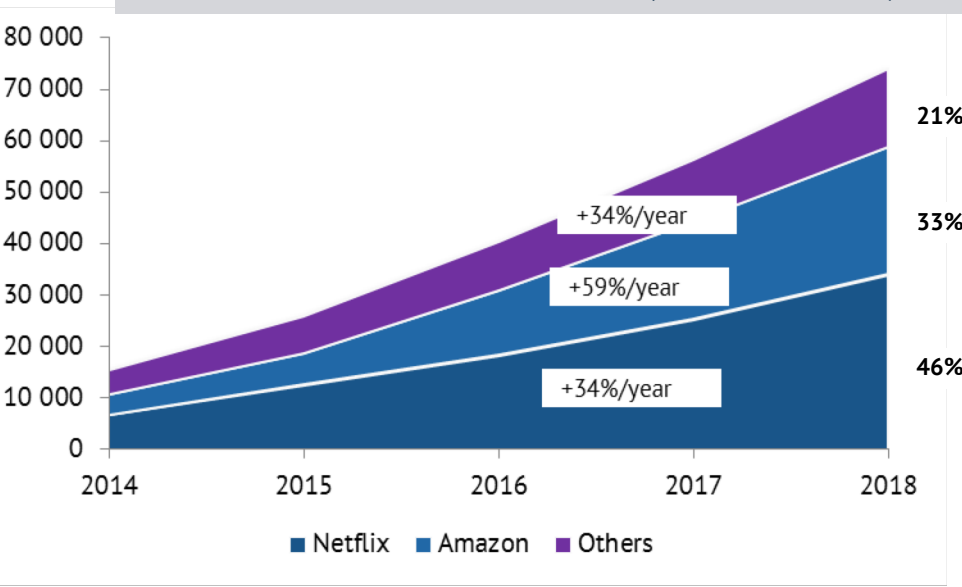


Source: Ampere Analysis

SVOD includes only OTT SVOD

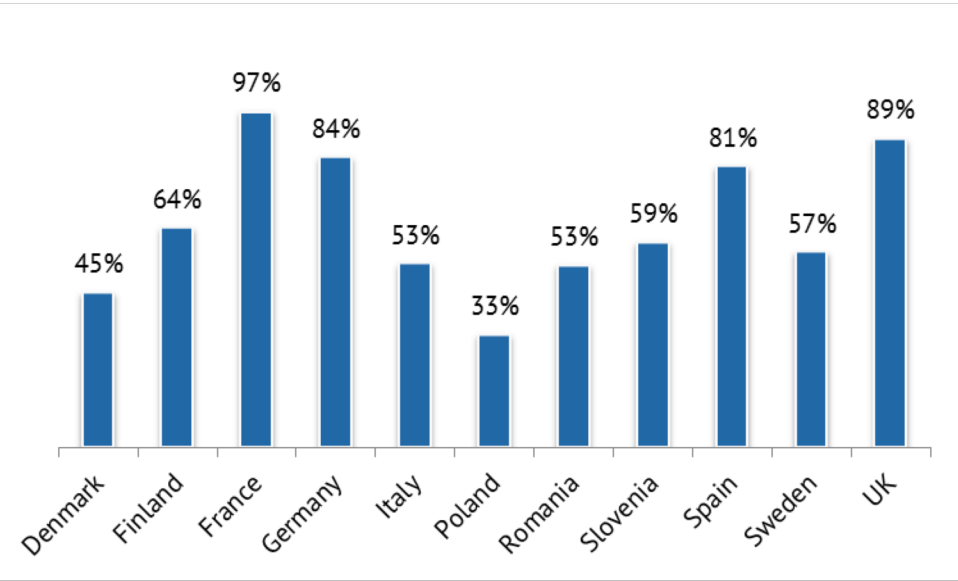
- Netflix+Amazon: about 80% of EU28 SVOD subs
- With a series of strong local competitors

Market share of Netflix+Amazon (subs, 2013-2018)



Source: Ampere Analysis

Market share of Netflix+Amazon (subs, 2018)



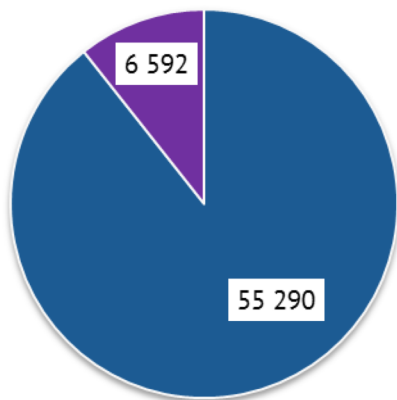
Source: Ampere Analysis

VOD CATALOGUES: OVERVIEW

What's on offer on VOD?

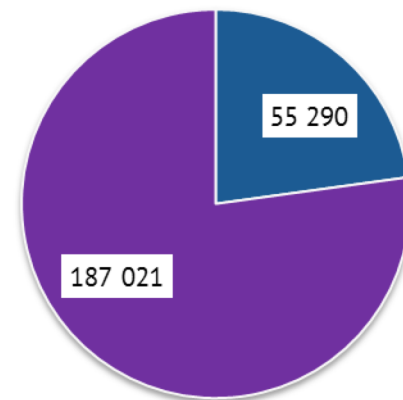
- Over 55 000 different films, 6 500 TV content titles and 187 000 TV content episodes

Unique titles available at least in one TVOD or SVOD catalogue in Europe



■ Films titles ■ TV series titles

Source: OBS



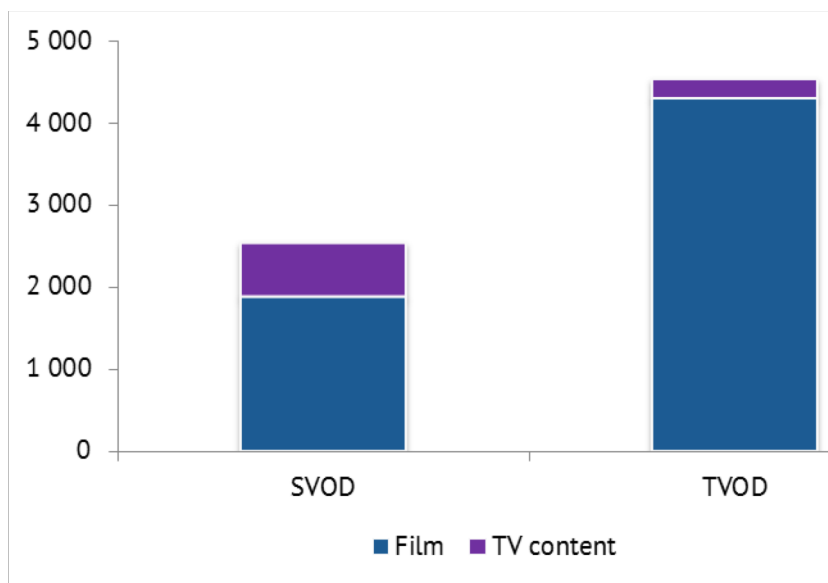
■ Films titles ■ TV series episodes

Source: OBS

What's on offer on VOD?

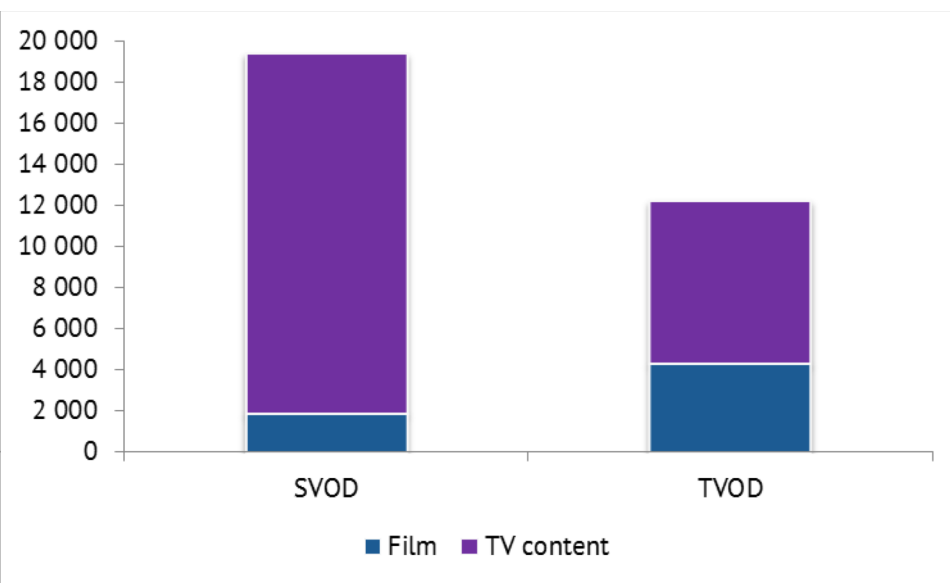
- ❑ TVOD catalogues as twice as big as SVOD catalogues... when considering only TV titles
- ❑ Far more TV content when considering episodes

Number of titles in VOD catalogues (1 TV series = 1 title)



Source: OBS

Number of titles in VOD catalogues (1 TV series episode = 1 title)

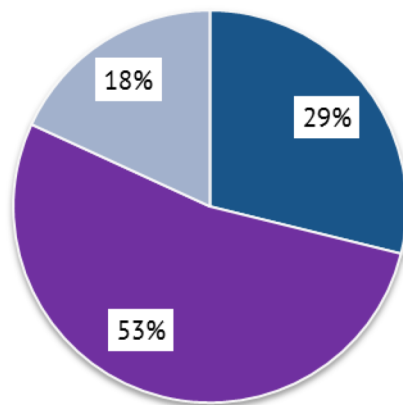


Source: OBS

What's on offer on VOD?

❑ The share of EU works depends on the indicator chosen for TV content

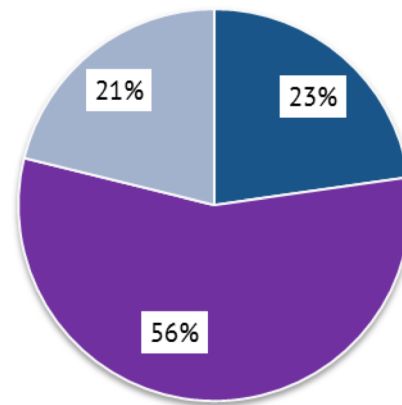
Origin of works in VOD catalogues (1 TV series = 1 title)



■ EU 28 ■ US ■ Others

Source: OBS

Origin of works in VOD catalogues (1 TV series episode = 1 title)



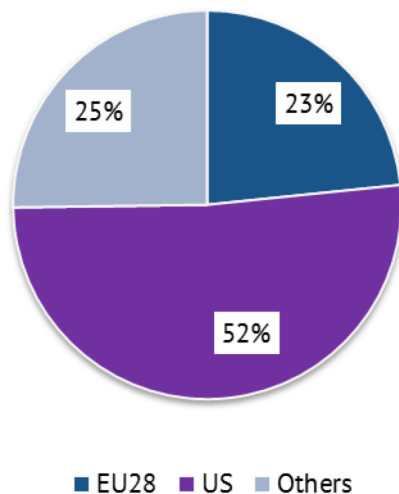
■ EU 28 ■ US ■ Others

Source: OBS

What's on offer on VOD?

❑ SVOD has less EU 28 than non EU28/non US content

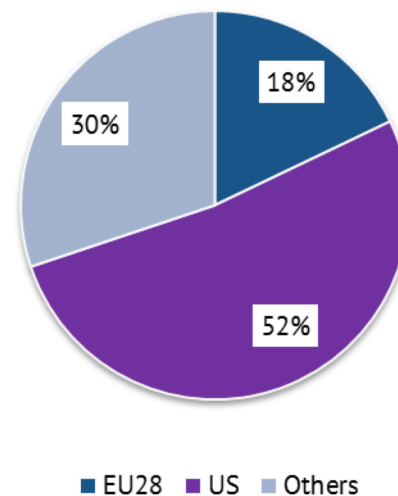
Origin of works in SVOD catalogues (1 TV series = 1 title)



Source: OBS

Origin of works in SVOD catalogues (1 TV series episode = 1 title)

Top 5: JP,
KR, CA, TW,
IN

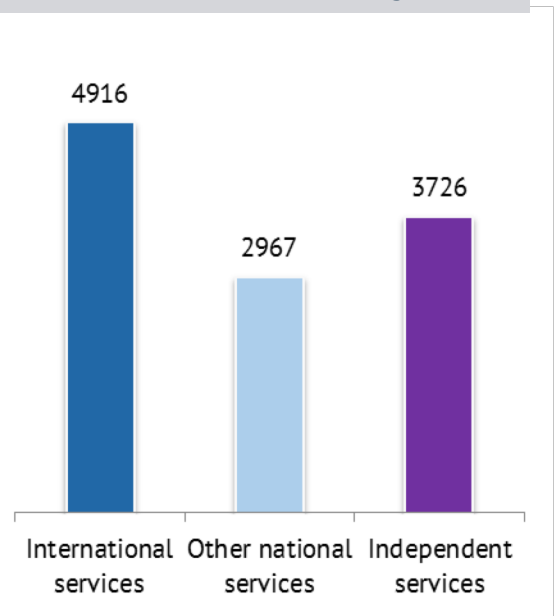


Source: OBS

DIVERSITY OF CATALOGUES

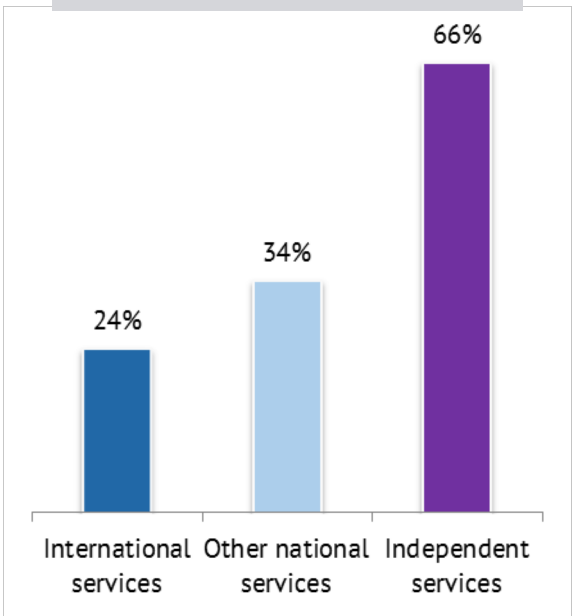
□ Diversity of the structure of catalogues

Number of films in catalogues



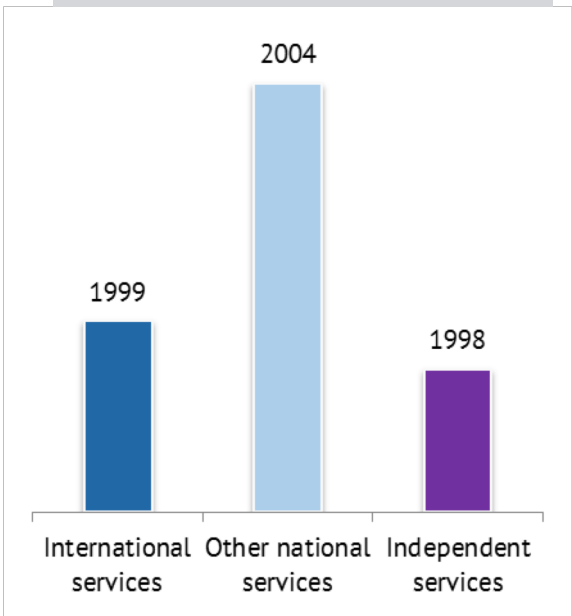
Source: OBS

Share of EU 28 works



Source: OBS

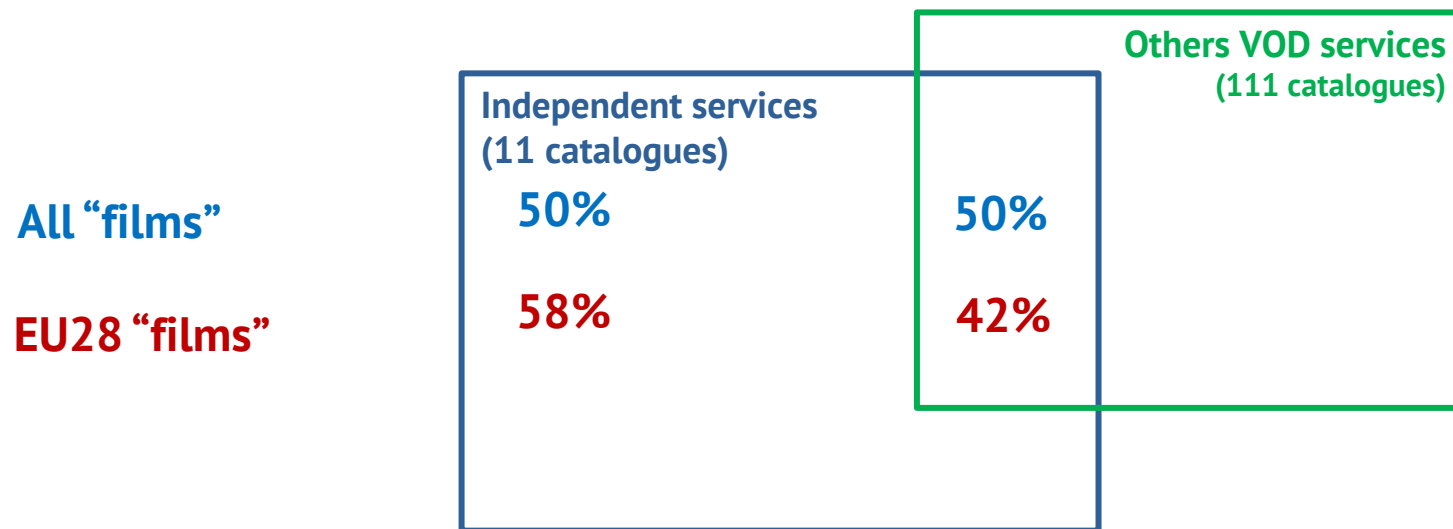
Average year of production of films



Source: OBS

- ❑ 50% of films (58% of EU28 films) found in at least 1 independent catalogue are not available elsewhere

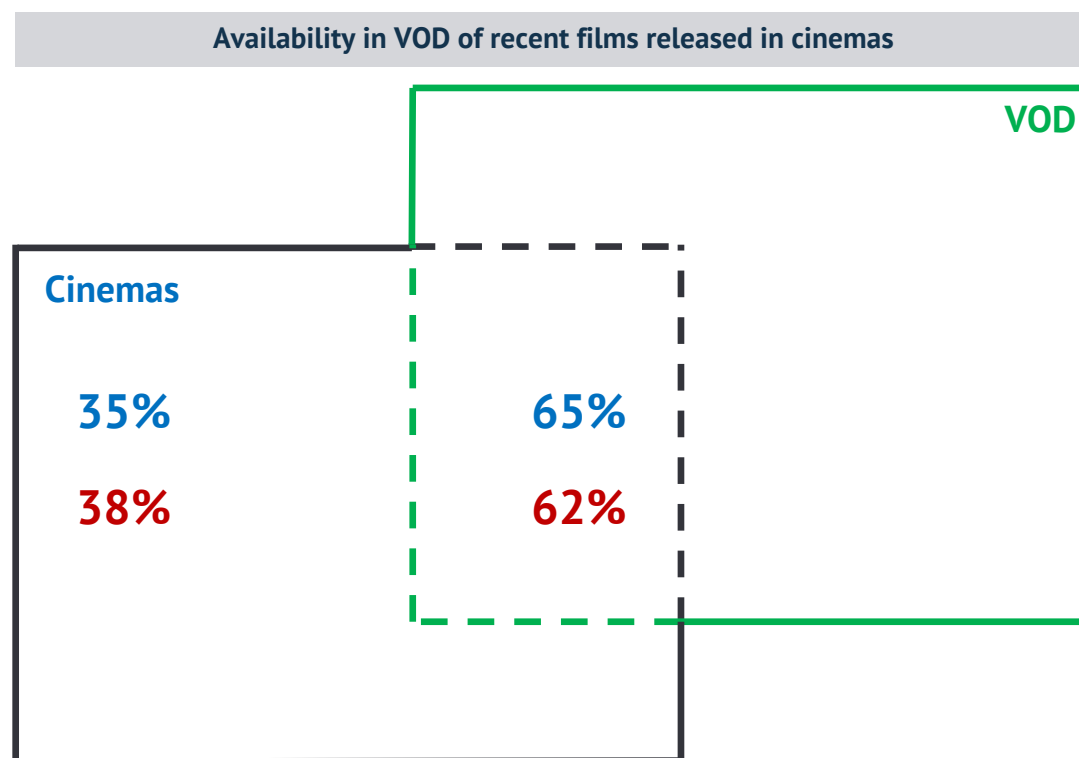
Exclusivity of film titles in independent VOD catalogues



Source: OBS

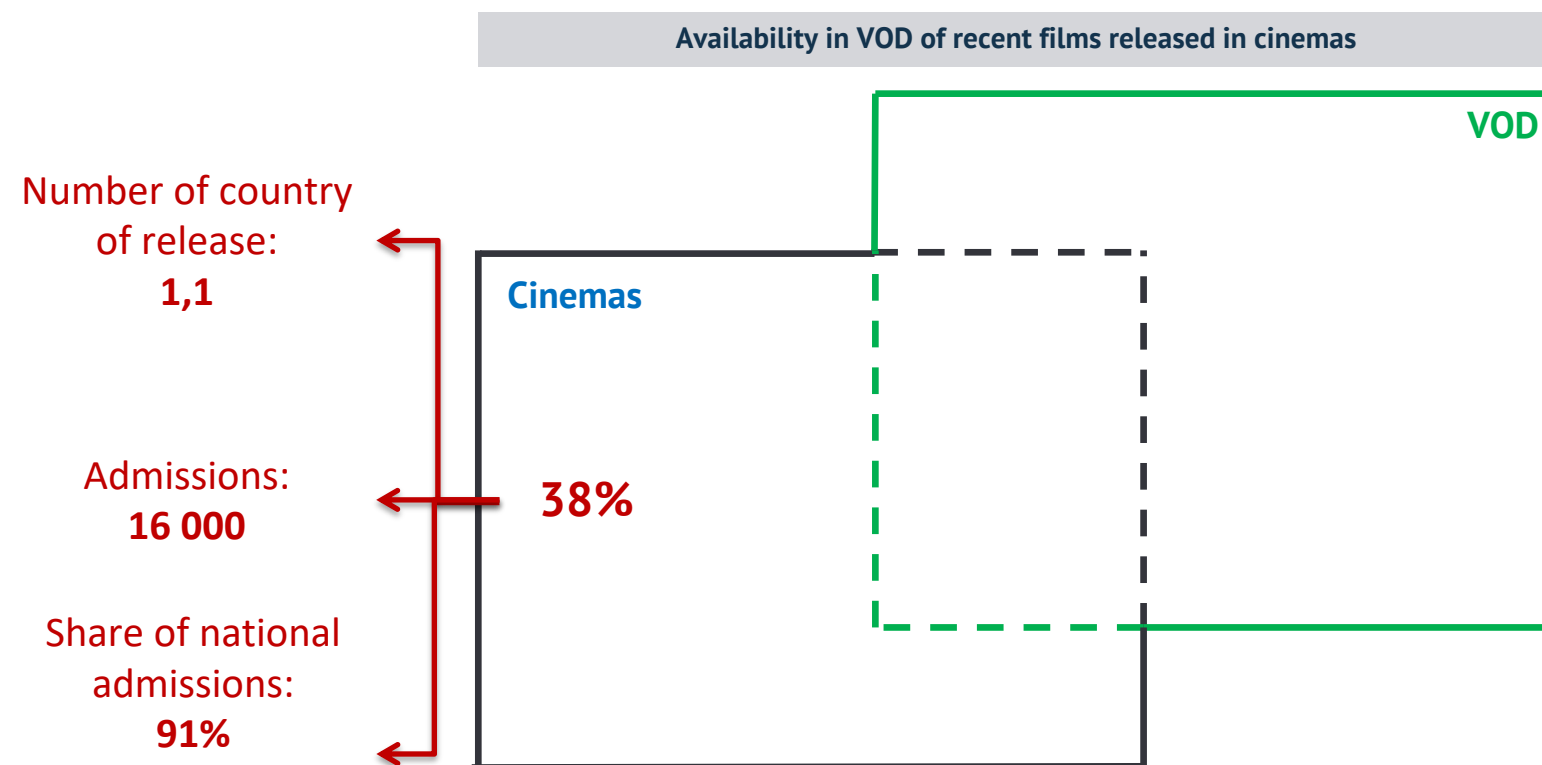
WHAT ARE “FILMS” ANYWAY?

- ❑ 65% of films (62% of EU28 films) released in cinemas are released in VOD in at least 1 country.



Source: OBS

- ❑ EU28 films which do not made it at all to VOD made on average 16 000 admissions

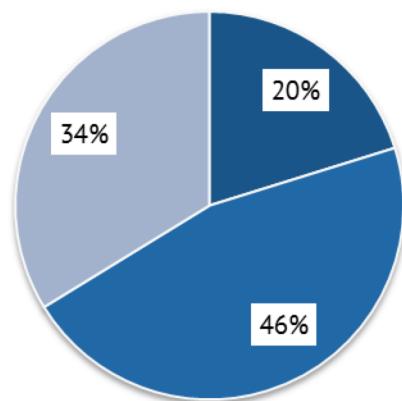


Source: OBS

From European cinemas to VOD

- ❑ On a country basis, cinema and VOD release overlap to an extent
- ❑ 34% of releases in VOD without a previous release in cinemas

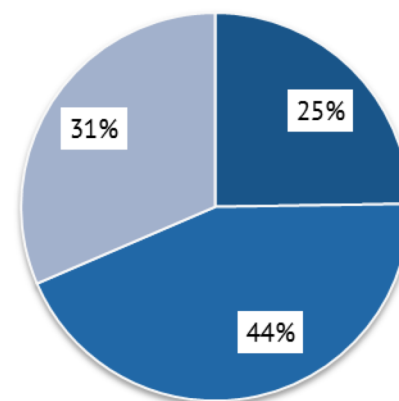
Breakdown of country releases – all films



■ Cinema only ■ Cinema+VOD ■ VOD only

Source: OBS

Breakdown of country releases – EU28 films

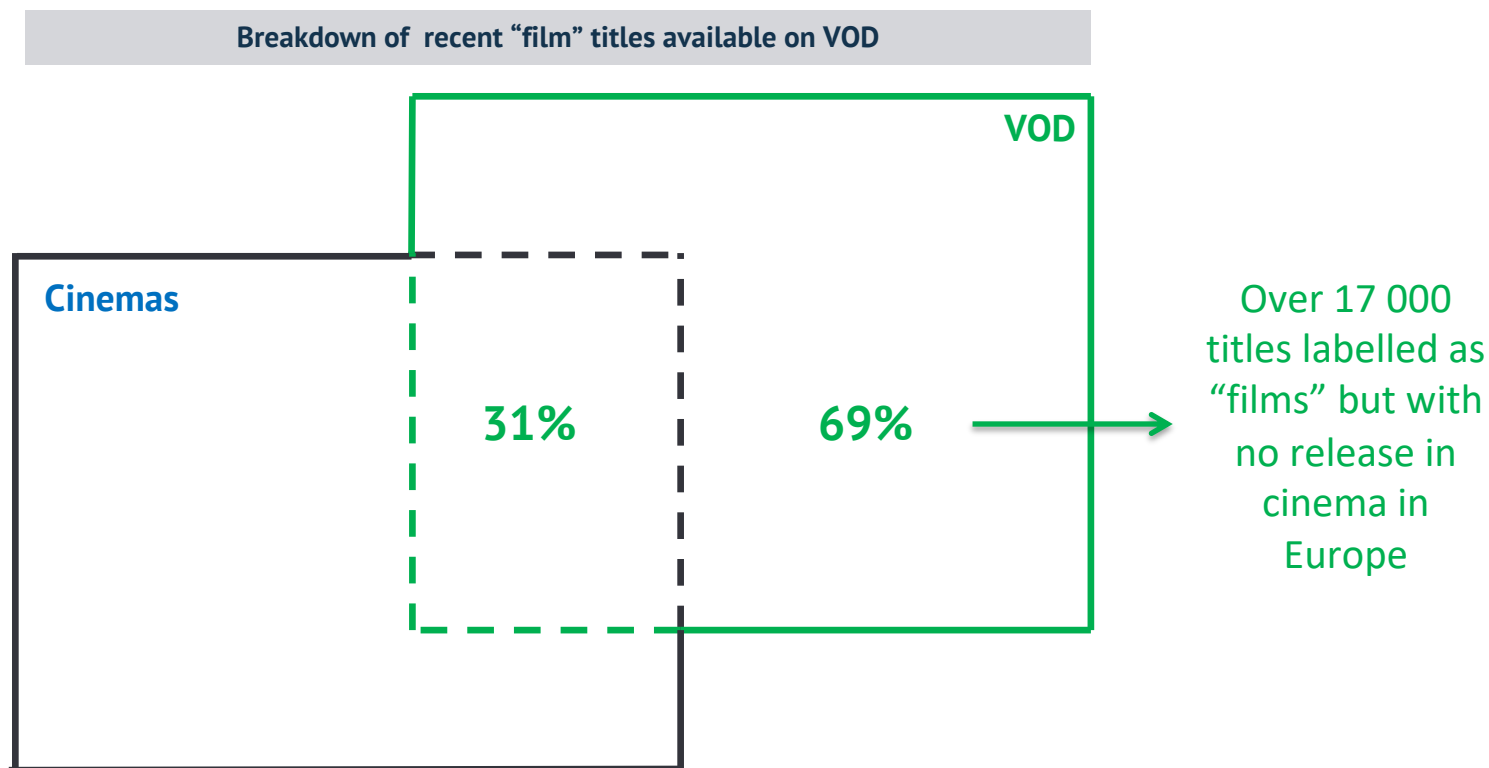


■ Cinema only ■ Cinema+VOD ■ VOD only

Source: OBS

« Films » in VOD catalogues are not necessarily films released in cinemas

- ❑ Films released in cinemas account for only 31% of “films” in VOD catalogues



Source: OBS

« Films » in VOD catalogues are not necessarily films released in cinemas



US TV movie



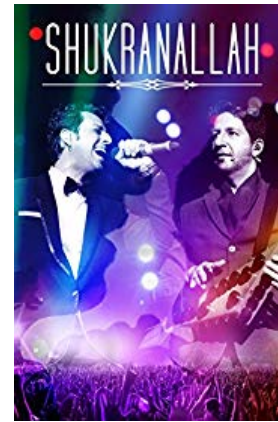
Direct to DVD
outside Japan



US doc film



US film, limited
release in cinemas



Indian TV movie



US direct to
Internet



Indian film



US direct to
video



BE doc
festivals only



GB TV movie



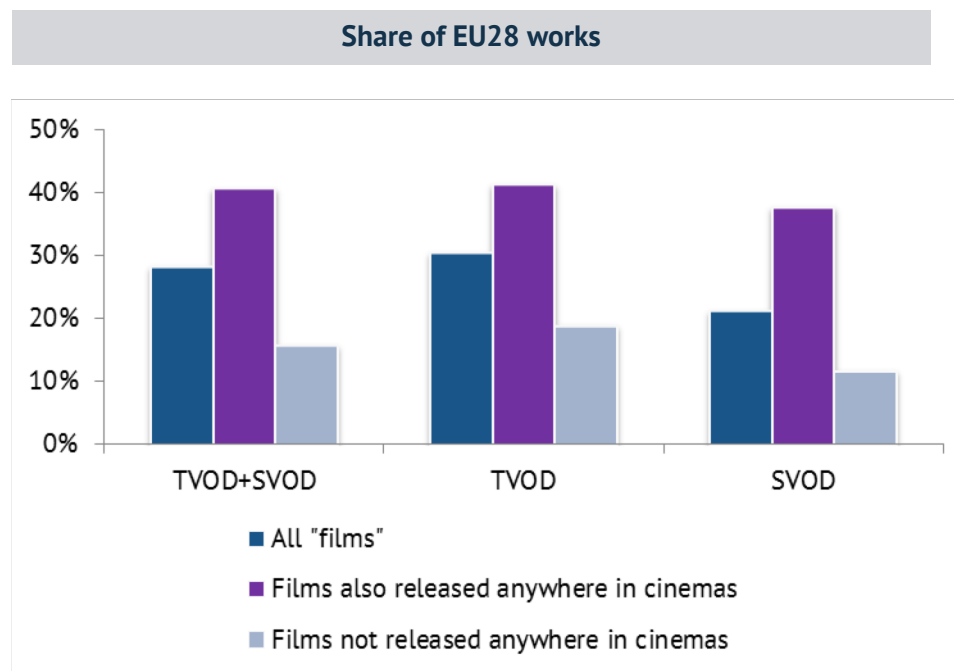
IT direct to
video



DE/US,
Festivals+direct
to video

« Films » in VOD catalogues are not necessarily films released in cinemas

- ❑ The share of EU28 works is higher for films than for other “films”



Source: OBS

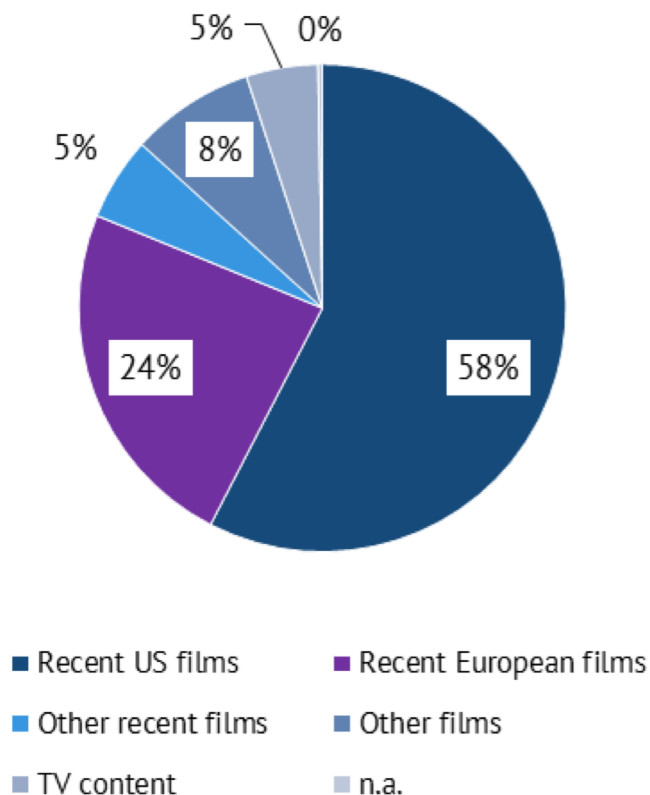
VISIBILITY

- ☐ Presence on the home page of the service (without scrolling)
- ☐ TVOD only
- ☐ 5 countries: UK, DE, FR, BE, NL
- ☐ 42 catalogues
- ☐ Data provided by AQOA

What is promoted on TVOD

- ❑ 87% of promotion for recent films
- ❑ 27% of promotion for European content

Breakdown of promotional spots on a selection of TVOD services



Source: OBS/AQOA

Base: 42 TVOD catalogues from 5 EU28

More information:
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