



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

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EUROPEAN AUDIOVISUAL OBSERVATORY
EUROPÄISCHE AUDIOVISUELLE INFORMATIONSTELLE



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

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>



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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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



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

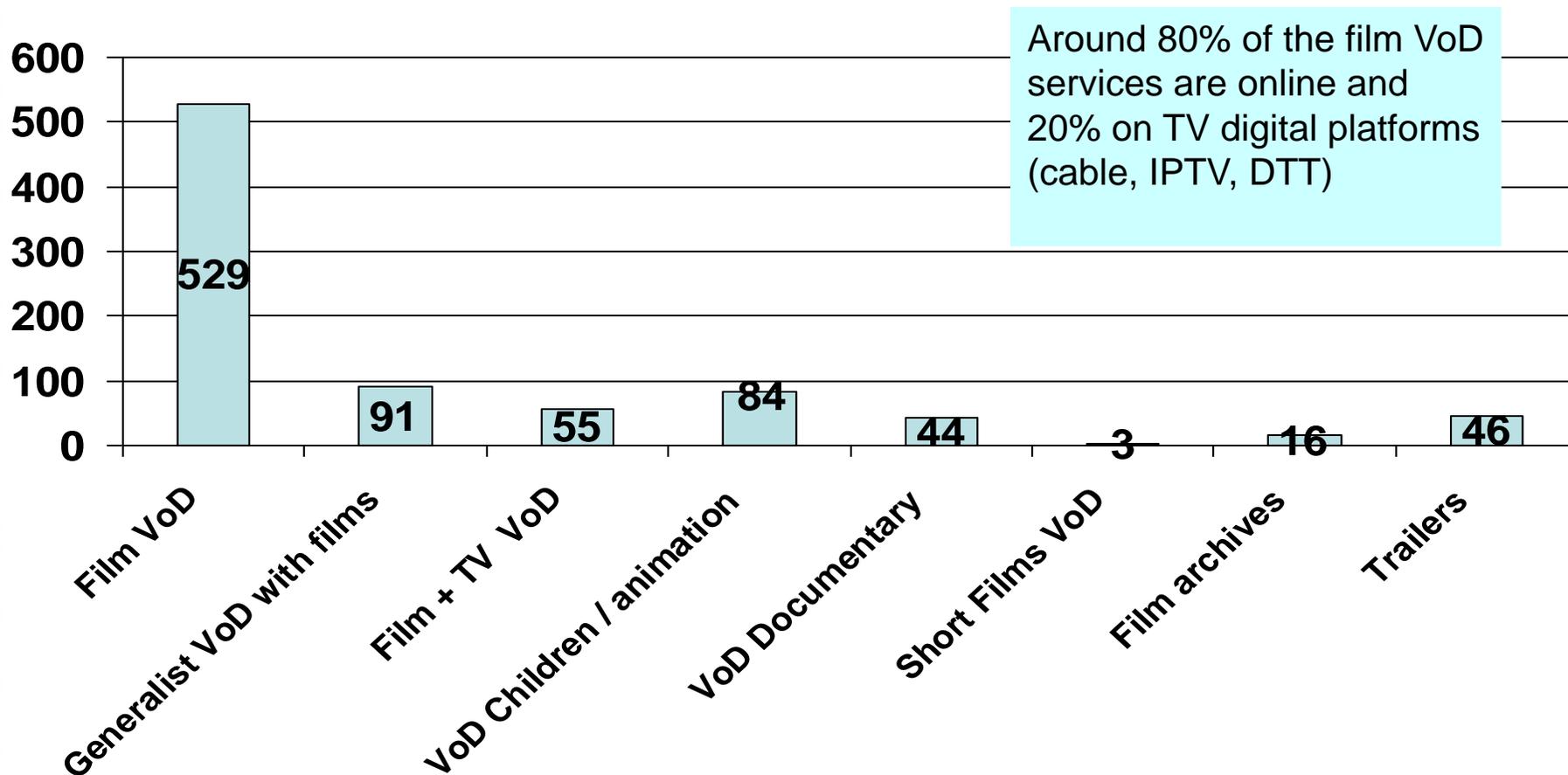
DEFINITION OF THE ON-DEMAND AUDIOVISUAL SERVICES

- 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)

EXAMPLES OF DISCREPANCIES BETWEEN DATA FROM AUTHORITIES AND MAVISE DATA

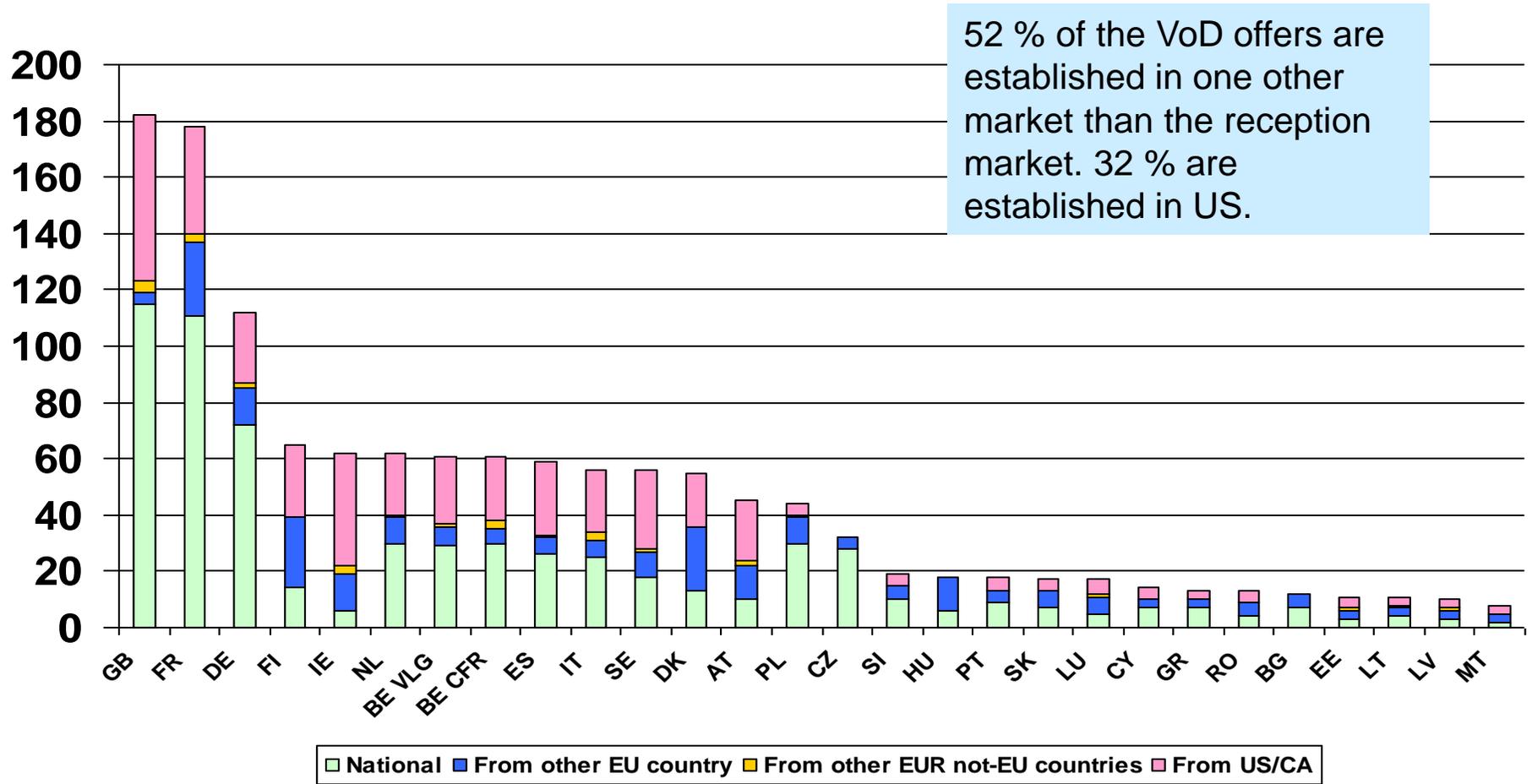
| | Authorities | EPRA questionnaire | MAVISE |
|----------|-------------|--------------------|--------|
| | Spring 2013 | Sep-13 | Sep-13 |
| AT | 93 | 121 | 117 |
| BE (CFR) | 25 | 23 | 35 |
| BE (VLG) | 28 | 52 | 45 |
| BG | 10 | 15 | 24 |
| CY | 12 | 2 | 14 |
| ES | 36 | | 96 |
| GB | 208 | 206 | 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)



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

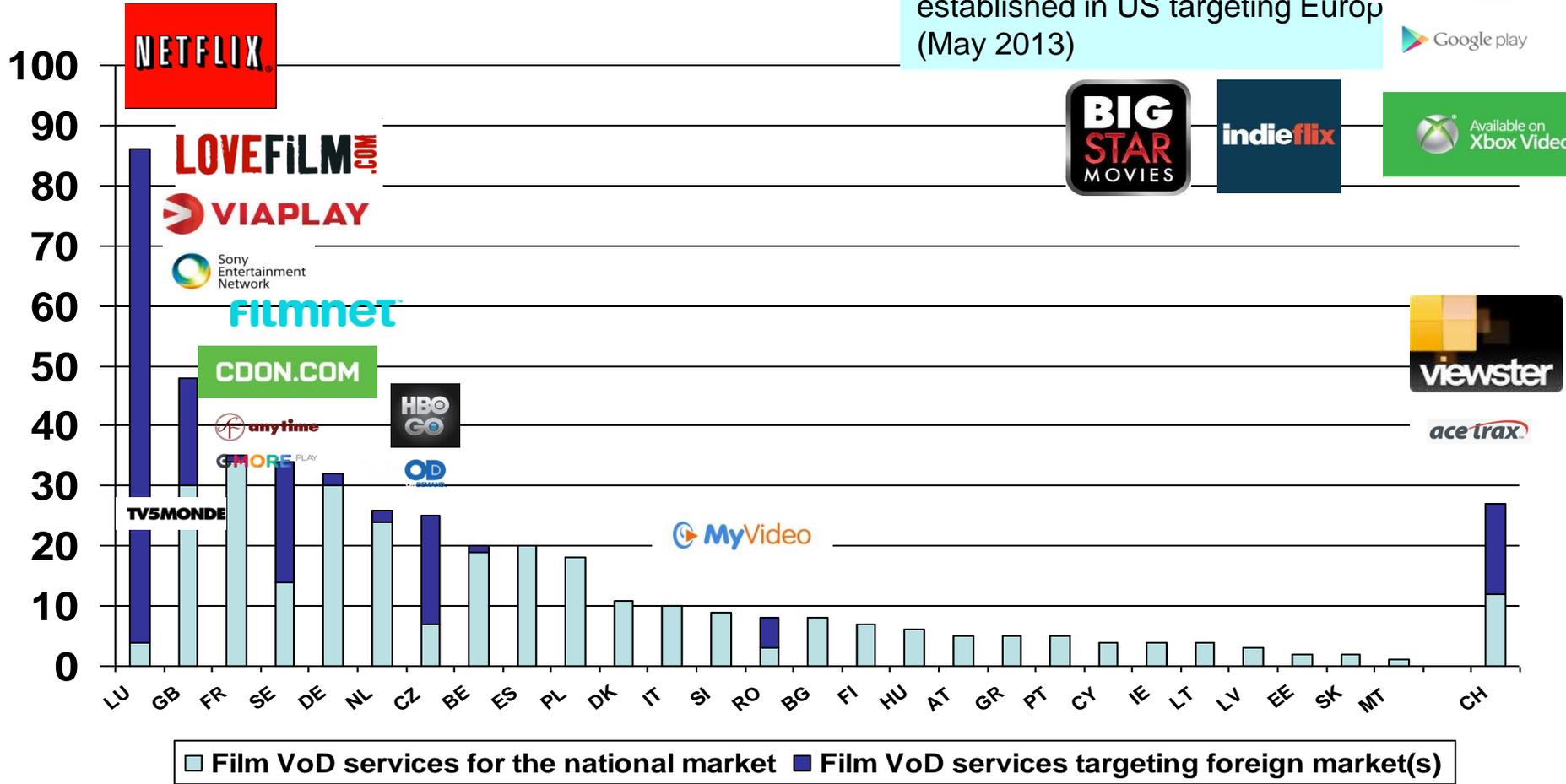
MUBI

Apple iTunes

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

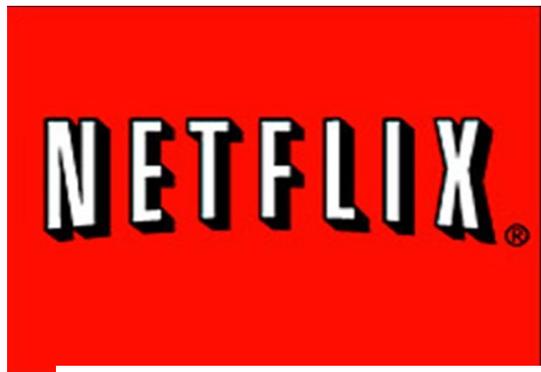
YouTube

Google play



Legend: ■ Film VoD services for the national market ■ Film VoD services targeting foreign market(s)

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



THE LEADING ADULT ODAVS ARE ESTABLISHED IN US



Around 50 % of Internet Video Audience in UK

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% |
| HARDEXTUBE.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% |

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
Number 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

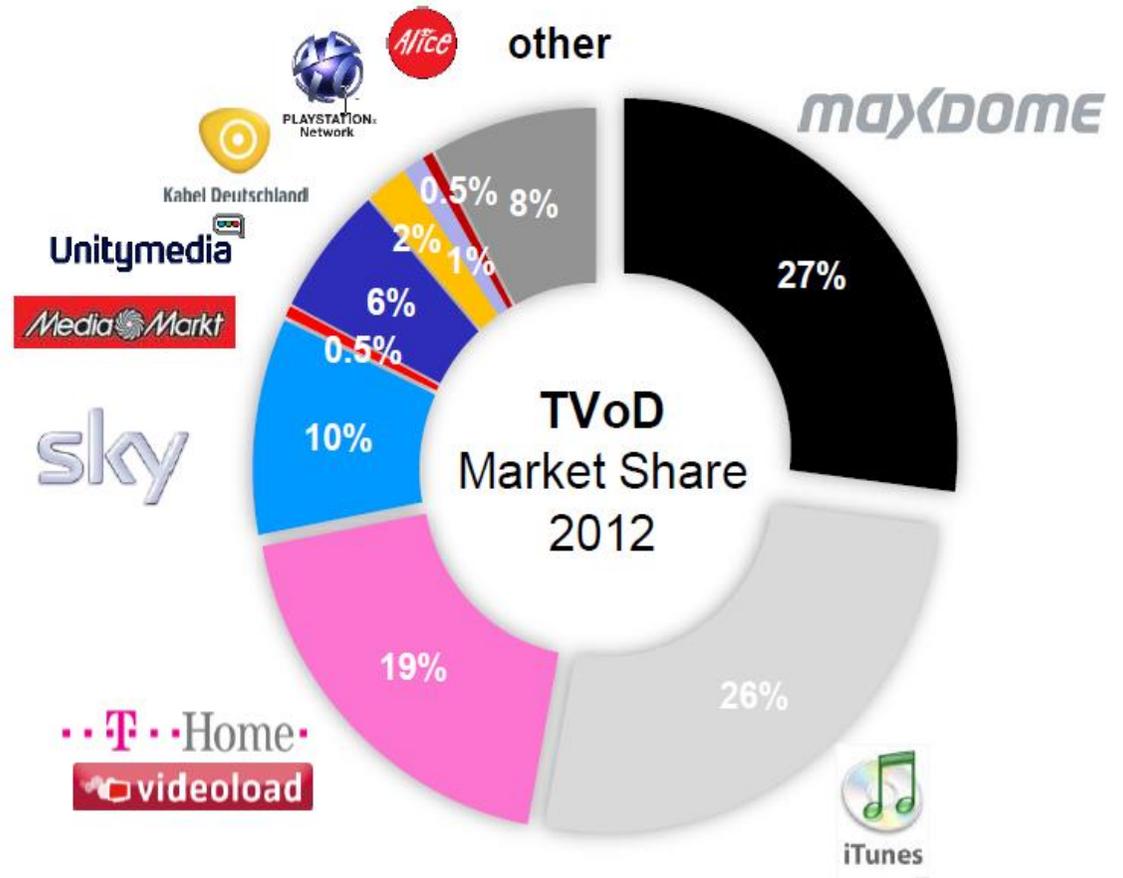
-IT: Cubovision, ChiliTV, Premium Play, FlopTV

-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.

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



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

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

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.

She posted 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 collects 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 dis-

tributed 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 \$10.9 billion 2012.

Recently, the Motion Picture Association of America identified 96 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 prominent 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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