



REPORT 72/2021

Content Area

Barcelona, 4 June 2021

The presence of European works in the catalogues of the on-demand audiovisual media services of Amazon Prime Video, Disney+, Filmin and HBO

1. Conclusions

This report aims to **establish the presence of European works** in the catalogue of programmes offered by the on-demand audiovisual media services Amazon Prime Video, Disney+, Filmin and HBO in Spain and to **identify the level of prominence of European works** in the catalogue of titles offered by these services.

In addition, it also aims to: analyse the possible influence of content-based recommendation algorithms on the levels of prominence of European works (based on an analysis of different profiles for these services); identify other data related to the production of European works (place of origin, original language, type); and quantify the presence of Catalan as a language.

This analysis has been carried out on the content appearing on PC interfaces on 9 April (Disney+ and HBO) and 20 April (Amazon Prime Video and Filmin) 2021, adopting the same methodology as the one used in Report 82/2020 The presence and prominence of European works on Netflix.

As regards the system used to calculate the share of European works in the catalogues, the Commission presented a communication¹ which states that it is more appropriate to calculate this based on titles rather than transmission or viewing time, defining what constitutes a title which, in the case of television series, corresponds to one season.

In order to assess the prominence of European works, one of the characteristics of the providers of on-demand audiovisual media services has been adopted, namely the viewer profile the programme is aimed at. This prominence is therefore calculated in relation to various profiles, depending on the availability of each on-demand service.

Two profiles for each service belong to the "cold start" mode; i.e. the viewers do not have a previous history of media consumption and have not expressed any predilection for a particular type of work. One of these "cold start" profiles is for adults, while the other, for children, is created based on the parental control tool offered by each provider. In the case of Amazon Prime Video and Disney+, which allow more profiles to be created, three more profiles have been defined, with consumption prior to data collection based on preferences for works of different origins (works from the USA, from Europe and from Spanish territories).

¹ Guidelines under Article 13(7) of the Audiovisual Media Services Directive concerning the calculation of the share of European works in on-demand catalogues and the definition of low audience and low turnover.

Amazon Prime Video

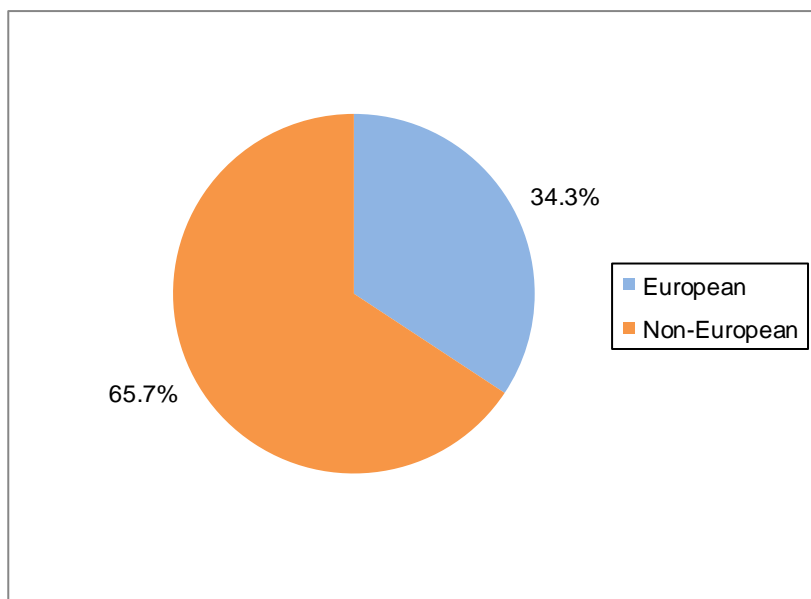
At the time of analysis, 5,585 titles have been counted in the Amazon Prime Video catalogue, the majority (73.3%) being feature films and TV movies.

The rest, 26.7%, correspond to seasons of TV series or other formats presented in serialised form.

The majority of the European works have been produced since 2010, accounting for 57.9% of the titles.

The presence of European works on Amazon Prime Video accounts for 34.3% of the entire catalogue.

Figure 1. Presence of European works in the Amazon Prime Video catalogue



Works whose original language is an official language of Spain account for 38.3% of all the European works.

For all profiles, the supply of European works on the 12 physical screens analysed, the most prominent ones, is lower than the figure recorded in the catalogue as a whole.

The presence of European works on the most prominent screens for viewers ranges from a minimum of 17.9% (cold start profile) to a maximum of 32.1% (children profile).

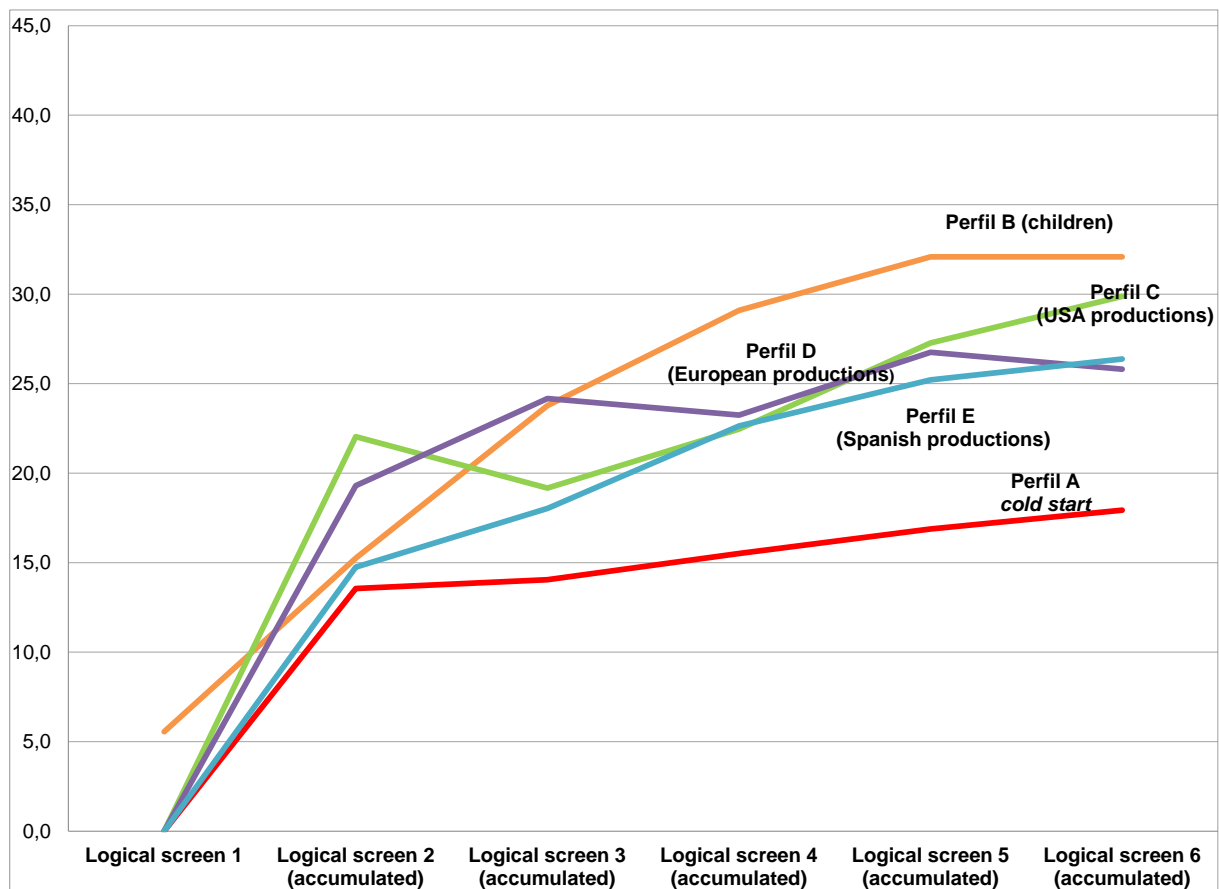
Table 1. European works offered by Amazon Prime Video on all 12 physical screens analysed for each of the 5 viewer profiles defined

	Profiles	European works	
		Number of works	%
Mode: cold start	Profile A	45	17.9
	Profile B (children)	60	32.1
Prior consumption of works from a specific origin	Profile C (USA production)	75	29.9
	Profile D (European production, except Spain)	64	25.8
	Profile E (production originating in Spanish territories)	67	26.4

In general terms, for all profiles, the presence of European works tends to increase as viewers move on to the subsequent screens and therefore decreases in prominence.

At the time of the analysis, four of the five Amazon Prime Video profiles did not offer any works of European origin on the first logical screen and in the case of the only one that did, the children profile, such works represent just 5.6% of the total number of works on that screen.

Figure 2. European works offered by Amazon Prime Video on each level of logical screen for each profile in the sample analysed (%)



The analysis has not detected in the interface any additional systems to promote European works that could help viewers to find and access European productions.

In 4 of the 5 profiles, the European works promoted in the form of advertisements appearing on the interface are promoted in line with the relative share of this type of production in the total catalogue (33.3%). In the case of the children profile, none of the advertisements promote European works.

Regarding repeated offerings of a title on different sections of the interface, which is another way of promoting a particular work, in 4 of the 5 profiles this is more than 10 points lower for European works than their share in the catalogue. For the children profile, this percentage is very similar.

Moreover, Amazon Prime Video does not include other elements likely to enhance the prominence of European works, such as a specific section classifying audiovisual works

according to their place of origin, although some of the sections grouping the works on offer do include a reference to origin in the title describing them.

Nor does entering the term "European" (or semantic derivatives) in the interface's free text search engine return results that correspond to this keyword.

The data do not show a relationship between the consumption preferences of each profile in terms of the work's place of origin and the titles offered to the viewer.

As shown in Table 1, despite prior consumption of European works and European works originating in the territories of Spain, profiles D and E receive a smaller offer of European works than a profile with prior consumption of works from the USA.

Nor is there any link between the preferences of profiles with predefined consumption and the share of European works when works are repeated or advertised.

Consequently, the recommendation algorithm would not give significant weight to the work's place of origin.

The Catalan language is present, as audio or subtitles, in 71 works, 1.3% of the titles in the catalogue. Three out of four are feature films and documentaries (77.5%).

In most of these works, the Catalan language is offered in audio form (81.7%), while 16.9% include it only as subtitles and the remaining 1.4% include both options.

As for works originally produced in Catalan (36 works), these represent 4.9% of the European works whose original language is an official language of Spain, and 1.9% of the European works in general.

With regard to the tools provided to find and access these titles, at the time of the analysis the Amazon Prime Video interface did not provide any search engine for works available with audio or subtitles in Catalan. Moreover, when a search is carried out with free text (for example, "works in Catalan"), correct results are not returned.

Catalan language works with the greatest prominence (on the 12 physical screens analysed) represent an even lower proportion than their share in the catalogue as a whole: only 3 appear (0.9% of the works offered to the 5 profiles defined for these screens).

Disney+

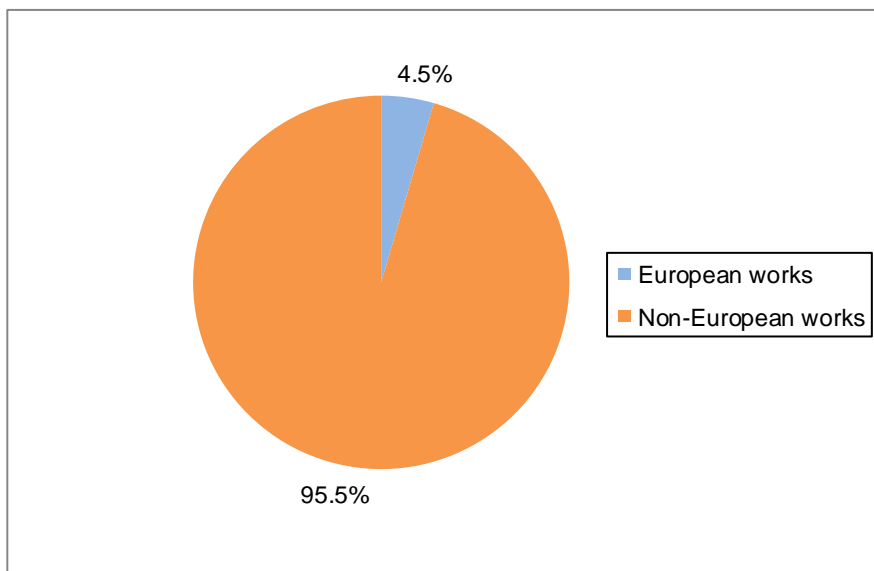
1,707 titles have been detected on the Disney+ interface, 60.2% of which are feature films and TV movies.

The remaining 39.8% correspond to TV series, calculated on a seasonal basis, and other serialised productions.

Almost two thirds of the European catalogue (70.1%) has been produced since 2010.

The presence of European works on Disney+ accounts for 4.5% of the entire catalogue.

Figure 3. Presence of European works in the Disney+ catalogue



Works whose original language is an official language of Spain account for 19.5% of all European works.

In all profiles, the presence of European works on the 12 physical screens analysed, the most prominent ones, is greater than in the catalogue as a whole.

The share of European works on the most prominent screens for viewers differs between profiles, ranging from 6.7% for children's works to more than 12% of the titles for profiles with a prior consumption of European and Spanish works.

Table 2. European works offered by Disney+ on all 12 physical screens analysed for each of the 5 viewer profiles defined

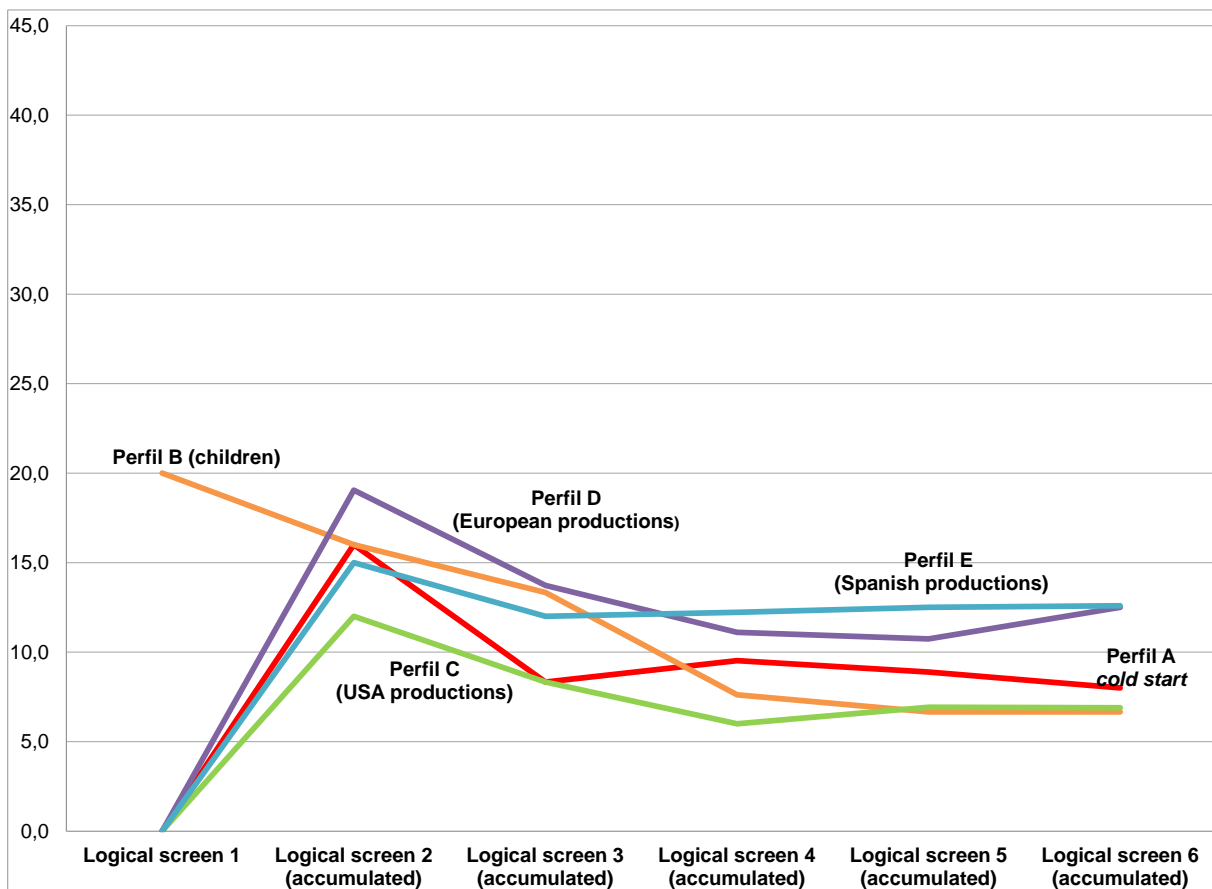
	Profiles	European works	
		Number of works	%
Mode: cold start	Profile A	12	8.0
	Profile B (children)	10	6.7
Prior consumption of works from a specific origin	Profile C (USA production)	10	6.9
	Profile D (European production, except Spain)	17	12.5
	Profile E (production originating in Spanish territories)	17	12.6

Four of the five Disney+ profiles created do not offer any titles of European origin on the first logical screen.

The only profile that does include the presence of works of European origin on this first screen is the children profile, where these represent 20%, although the percentage decreases progressively as the viewer moves on to the subsequent logical screens, reaching 6.7% on the last two.

On the rest of the logical screens, the differences between profiles in terms of the space given to European works are related to previously defined consumption characteristics, especially from the third screen onwards. Consequently, profiles with a prior consumption of European and Spanish works are those with the highest percentages of European works, while those with a preference for American productions have the lowest.

Figure 4. European works offered by Disney+ on each level of logical screen for each profile in the sample analysed (%)



The Disney+ interface contains some additional elements that promote European works, such as including a larger share of these in advertisements than their share in the catalogue as a whole.

In 4 of the 5 profiles, a larger proportion of European works are promoted in the form of advertisements appearing on the interface (33.3%) than their relative share in the catalogue as a whole. In the children profile, however, none of the advertisements are for European productions.

A second system used to promote works is to repeat the offering in more than one section of the interface. In the two cold start profiles, the percentage of repeated European works differs slightly with respect to all the screens in the sample: while this is over two points higher for the standard profile, for the children profile it is 0.8 points lower. On the other hand, and in the rest of the profiles, the repetition of works reinforces these characteristics: in the profile showing a preference for consuming works from the USA, the relative share of

European works is lower than its presence in the total sample, while this is higher for profiles with prior consumption of European and Spanish works.

The Disney+ interface does not provide viewers with other elements that could enhance the prominence of European works, such as a section classifying content according to the works' place of origin or the possibility to search for titles of a given nationality.

The data show a relationship between the consumption preferences of each profile in relation to the work's place of origin and offer received by the viewer.

As shown in Table 2, profiles with a prior consumption of European works and European works originating from Spanish territories (D and E) almost double the share of European works for the profile with prior consumption of works from the USA. This phenomenon is also detected in the repetition of the offer.

In contrast, no relationship has been observed between the preferences of profiles with predefined consumption and the share of European works in the advertisements offered.

Consequently, in the case of Disney+, the recommendation algorithm would attach some importance to the place of origin of the production.

Disney+ offers 3 animated feature films (0.2% of the catalogue) with audio available in Catalan.

One of these works appears as an audio option among the possibilities offered at the start of the screening; the other two, however, are located as "Catalan version" in the "Extras" section of the interface (where the trailers, the "making of" and interviews related to the works also appear), but not as an audio option. Nor is it possible to search for the work by its title in Catalan.

Disney+ offers 2 feature films dubbed into Catalan on the most prominent screens of one of the 5 profiles analysed, representing 0.7% of the total of 274 titles offered on these 6 logical screens.

Only one work has been detected with Catalan as its original language, accounting for 6.7% of the European works with an official language from Spain and 1.3% of all European works. This feature film is not available with Catalan audio.

Filmin

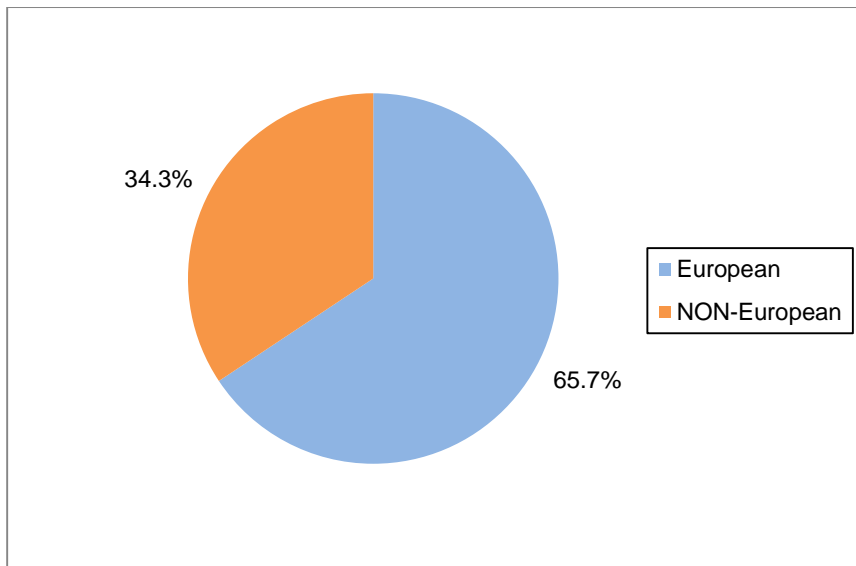
Filmin's interface offers 10,327 titles, with most of the productions consisting of a single unit.

One-off productions (such as feature films, short films and most documentaries) account for 95.1% of the catalogue and serialised productions (in number of seasons) represent 4.9%.

The majority of the European works in Filmin's catalogue, 60.9%, have been produced since 2010.

The presence of European works on Filmin accounts for 65.7% of the entire catalogue.

Figure 5. Presence of European works in the Filmin catalogue



Works whose original language is an official language of Spain account for 31.9% of the total European works and those whose original language is Catalan represent 6.6%.

Titles whose original language is Catalan account for 4.3% of the whole catalogue.

The standard cold start profile has a lower share of European works than the catalogue as a whole, while the children profile is very similar.

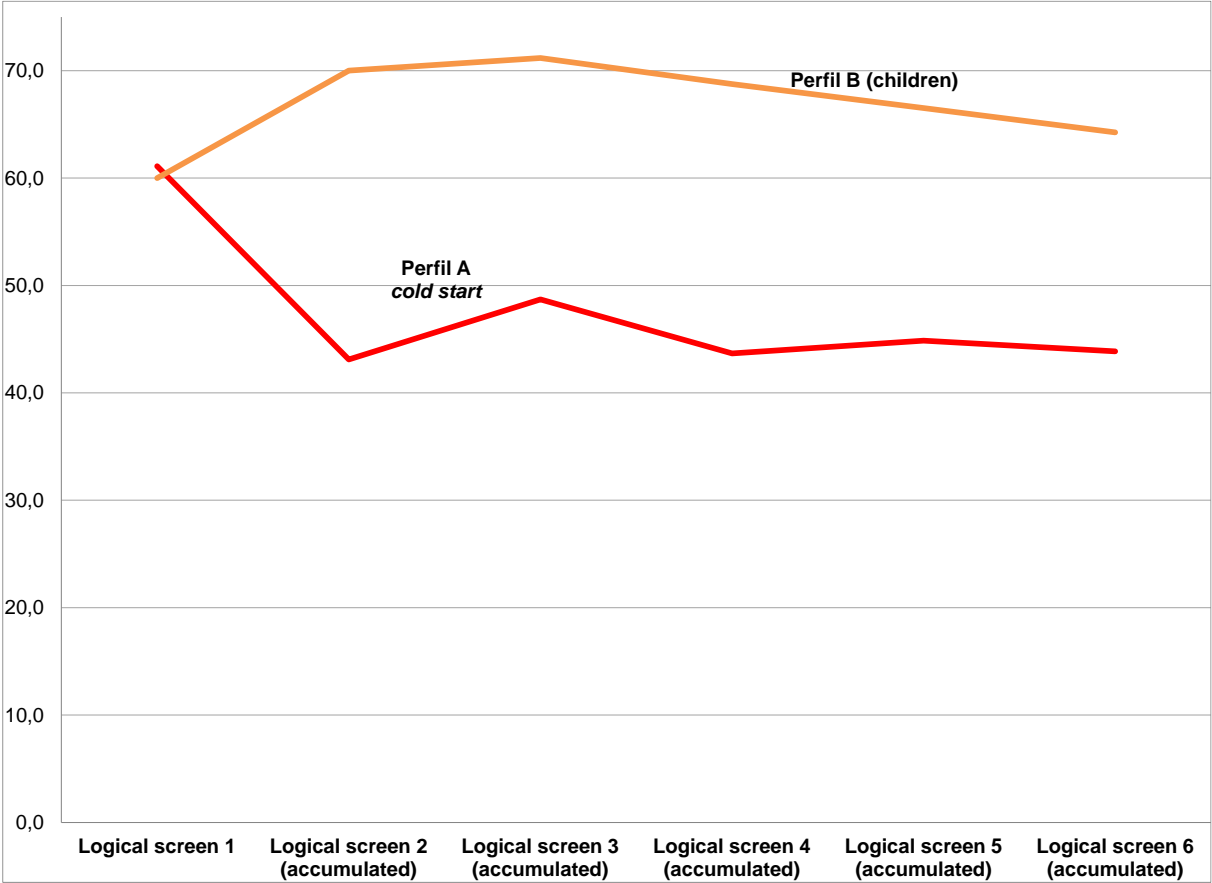
Table 3. European works offered by Filmin on all 12 physical screens analysed for each of the 2 viewer profiles defined

	Profiles	European works	
		Number of works	%
Mode: cold start	Profile A	100	43.9
	Profile B (children)	151	64.3

The presence of European works for the two cold start profiles analysed varies from the second logical screen onwards.

The two profiles offer a similar share of European works on the first logical screen (61.1% and 60%). However, on the subsequent screens for profile A, the relative share of European productions decreases (between 43.1% and 48.7%) whereas it increases in the case of the children profile (between 64.3% and 71.2%).

Figure 6. European works offered by Filmin on each level of logical screen for each profile in the sample analysed (%)



All the advertisements on Filmin's interface promote European works.

On the screens that make up the profile A sample, Filmin offers three advertisements, all for European works, while the children profile does not include advertisements for the works in the catalogue.

As for repetitions of a title offered on different sections of the interface, which is a second system used to promote works, for profile A this is lower than for the catalogue as a whole (34.5%), while for the children profile it is very similar (65.2%).

The inclusion of a section on the Filmin interface that classifies titles in the catalogue according to their place of origin facilitates access to European works.

Filmin includes a third mechanism to facilitate access to European productions: it provides viewers with a section that classifies the works on offer according to their place of origin. In addition, various sections of the interface include the original title of the works as one of their defining characteristics.

Filmin offers 18.9% of the titles in its catalogue with audio or subtitles in Catalan.

Catalan is present in the form of subtitles in almost half of these works (47.4%), in 37.1% it is offered in the form of audio and in the remaining 15.5% by means of both options. Nearly a quarter of these works (22.4%) correspond to content whose original language is Catalan.

As for works originally produced in Catalan (448), these account for 20.7% of the European works whose original language is an official language from Spain and 6.6% of the total European works.

28.5% of the works with prominence for the two profiles are offered in Catalan.

In addition, the Filmin interface allows searches with the keyword "Catalan", which returns the catalogue contents included in the predefined category "Catalan cinema", as well as a partial list of works produced in Catalonia or offered in Catalan.

Filmin has a Catalan-language interface, FilminCAT, which exclusively offers works from the general catalogue produced in Catalonia or available in Catalan.

The films, short films and series produced or available in Catalan from Filmin's general catalogue total 1,961 titles.

HBO

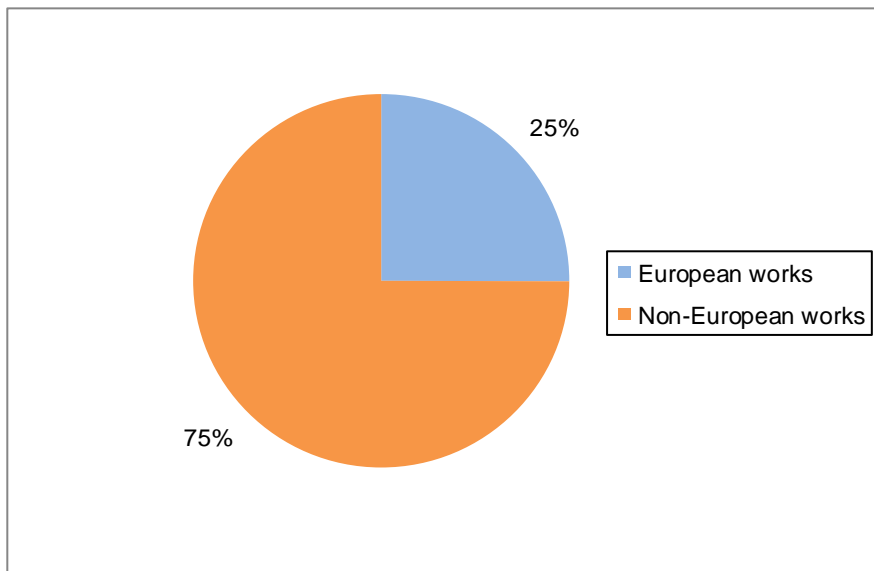
1,725 titles have been found on HBO's interface, with a similar proportion between feature films (including TV movies) and serialised productions.

Feature and TV films represent 52.7% and serial productions (in number of seasons) 47.3%.

In terms of the production date of the catalogue of European works, more than two thirds (70.8%) have been produced since 2010.

The presence of European works on HBO accounts for 25.0% of the entire catalogue.

Figure 7. Presence of European works in the HBO catalogue



Works whose original language is an official language of Spain represent 29.4% of all the European works.

In the two profiles created, the share of European works on the 12 most prominent screens as a whole is slightly lower than in the catalogue as a whole.

European works on the 12 physical screens with the most prominence for viewers represent 21.3% in both the cold start and children profiles.

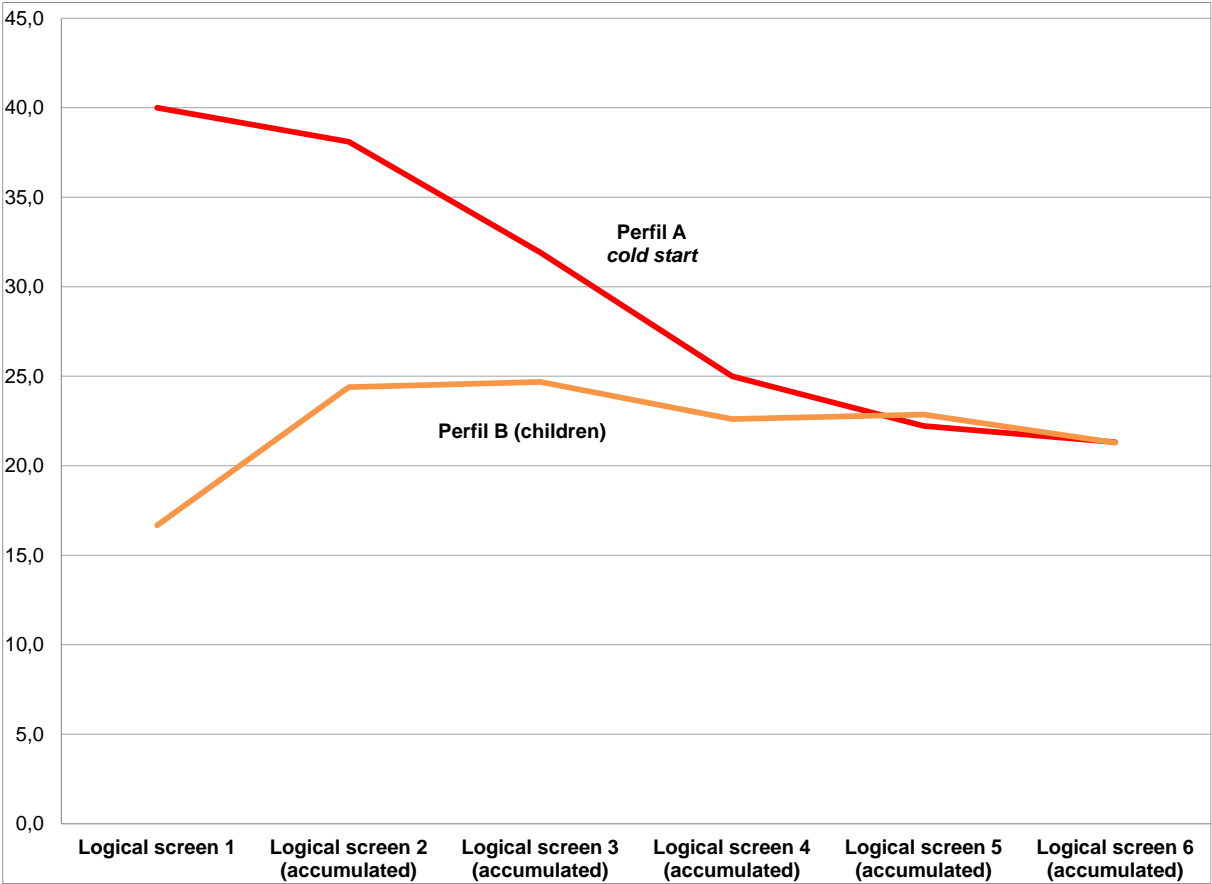
Table 4. European works offered by HBO on all 12 physical screens analysed for each of the 2 user profiles defined

	Profiles	European works	
		Number of works	%
Mode: cold start	Profile A	26	21.3
	Profile B (children)	33	21.3

The presence of European works for the two cold start profiles analysed differs significantly depending on the logical screen in question.

These differences are evident on the first three logical screens: for profile A the share of European works ranges from 40.0% on the first screen to 31.9% on the third screen, while for children the first screen has the lowest share (16.7%), fluctuating around 25% on the next two screens.

Figure 8. European works offered by HBO on each level of logical screen for each profile in the sample analysed (%)



The share of European works present in HBO advertising for both profiles is higher than the presence of European works in the HBO catalogue.

30.4% of the advertisements offered to profile A and 32% of those aimed at the children profile are for European works.

Similarly, the repetition of titles offered in different sections of the interface, which is another way to promote works, is also slightly greater for the two profiles than in the catalogue as a whole (26.3% and 23.5%, respectively).

The HBO interface does not include other mechanisms to facilitate access to European works. It does not offer any section where works are classified according to their place of origin, nor does it allow searches by nationality. On the other hand, some of the headings that group the available productions together do refer to nationality in the title describing each work.

The Catalan language is present in only one work, accounting for 0.1% of all the titles in the catalogue.

In this work, a documentary series consisting of three episodes, the Catalan language, which is also the original language, is offered in audio form.

This title whose original language is Catalan, available in the HBO catalogue, represents 0.8% of the European works with an original language that is an official language of Spain and 0.2% of the total European works.