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## **U.S. Availability of Film and TV Titles in the Digital Age**

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SNL Kagan is an offering of S&P Global Market Intelligence.

## Introduction

Motion picture and television content has been delivered over the Internet for more than 15 years. Advanced set-top boxes and high-speed data connections helped open the gateway for the digital delivery of content and expand the user base. The segment really began to take off in 2007 when Netflix launched its streaming service, which at the time was free for all of its DVD-by-mail subscribers. Today, a multitude of services offer digital video on demand in a variety of ways, allowing consumers to choose between subscription, electronic sell-through, and both ad-supported and rental VOD.

Studios have embraced digital delivery as the future of home video, not only by providing their content to service providers like Netflix and Apple, but also by building their own digital services. In 2006, Disney/ABC Television Group, Fox Broadcasting Company and NBCUniversal Television Group formed a joint venture and launched Hulu in 2008, one of the more popular streaming services.

The growth of digital video services has led to healthy competition and a boom in both original and licensed content as providers look to attract consumers and differentiate between services. For example, Netflix struck a deal for Walt Disney films in the pay TV window, while Hulu has deals with several major networks to air new shows the day after they are broadcast on TV. As a result, consumers can now access box-office hits and top-rated shows from a variety of digital video services.

SNL Kagan was commissioned by Motion Picture Association of America (MPAA) to carry out a study to quantify the availability

of, and growth in, legitimate digital film and TV series offerings in the U.S.

We reviewed the availability of such digital content provided by 33 major online video-on-demand distributors and by 14 TV Everywhere on-demand services. These services are described as follows:

**Online Video On Demand (VOD)** – These are services where consumers can view digital film and TV series via four different categories: electronic sell-through (EST), online rental, subscription video on demand (SVOD) and advertising-supported video on demand.

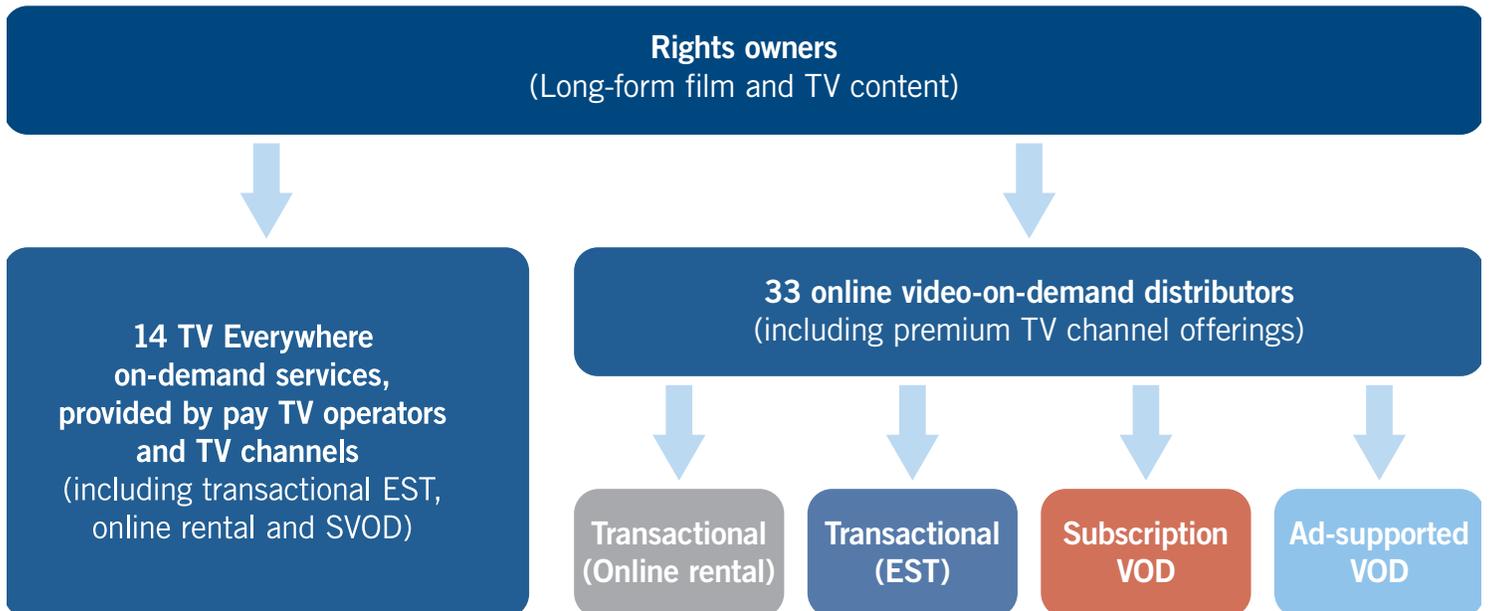
**TV Everywhere On Demand** – These are services such as HBO GO or offerings from multichannel video programming distributors (MVPDs) that allow consumers to watch films and TV series via an authenticated, online service with their paid subscription. An additional payment is required from subscribers for any EST, online rental or subscription online video offering.

This report does not cover free online catch-up TV<sup>1</sup> (services from broadcast and cable networks to view a limited number of recent TV episodes at least a week after they are aired on TV channels).

In terms of the type of films and TV series, SNL Kagan investigated the availability of digital “premium content”

<sup>1</sup> Catch-up content: TV video content that has already been aired on a TV network at an earlier date.

**Chart 1: The supply of film and TV series through online services**



(defined as legitimate long-form popular<sup>2</sup> and critically acclaimed films and TV series<sup>3</sup>) and independent film titles, across the 47 online video services.

A brief overview of our approach follows:

To determine the proportion of premium film titles available in the U.S., SNL Kagan compiled lists of popular films (as measured by box office success) as well as critically acclaimed and independent films and looked up the availability of each of these on the online services described above.

In total, there were 1,067 films falling into the following eight sub-samples:

- 2015 box office hits;
- 2014 box office hits;
- 2013 box office hits;
- Box office hits between 2002 and 2012;
- All time box office hits;
- American Film Institute top 100 films;
- Oscar-winning best pictures; and,
- Top 60 independent films between 2013 and 2015

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<sup>2</sup> Most popular film and TV titles are based on highest gross box office receipts for films and highest TV ratings for television shows. See methodology section for further explanation.

<sup>3</sup> Critically acclaimed film and TV titles are based on award-winning films (Oscar 'best film' winners) and TV series (Emmy and Golden Globe winning TV series). See methodology section for further explanation.

This equates to a total of 857 unique film titles, when duplicates appearing in multiple sub-samples are counted only once. We report findings by both the total unique film titles and by the eight sub-samples.

To determine the proportion of premium TV content that was available in the U.S., SNL Kagan compiled lists of popular TV titles (as measured by TV ratings) and award-winning TV series, and then checked the availability of each of these across the selected online services.

In total, there were 933 individual TV series falling into the following eight sub-samples:

- 2015 TV hits;
- 2014 TV hits;
- 2013 TV hits;
- 2012 TV hits;
- 2011 TV hits;
- Pre-2011 TV hits;
- Golden Globe TV winners; and,
- Emmy TV winners

*Please see the methodology section for detailed information.*

## Executive Summary

There are three main findings to SNL Kagan’s study of film and TV series title availability in the digital age:

- There is a high proportion of most popular, critically acclaimed and independent films and TV series available through dozens of online services. We found that 98% of premium films and 94% of premium TV series were digitally available on at least one of the online services we reviewed (including online VOD and TV Everywhere on-demand services).
- Most popular, critically acclaimed and independent films and TV series are widely available online to U.S. consumers. The findings show that the online availability of popular and critically acclaimed films was not limited to one or a few online services. We found that 95% of premium films and 84% of premium TV series were digitally available on at least five of the online services we reviewed.
- There has been an increase in the number of most popular and critically acclaimed digital films and TV series made available when compared to a similar study carried out by KPMG two years ago. We found that 97% of premium films were digitally available on at least one of the online VOD services we reviewed – up from 94% in 2013. We also found that 93% of premium TV series were digitally available on at least one of the online VOD services we reviewed – up from 85% in 2013.

## KEY FINDINGS - FILM TITLES

### 1.1 Film titles on online VOD and TV Everywhere on-demand services

As of December 2015, SNL Kagan found that 98% of the 857 unique popular, critically acclaimed and independent films reviewed were available via online services on at least one of the 47 service offerings studied.

- The availability of film titles in certain sub-samples was as follows:
  - 100% of 2014 U.S. top 100 box office hits
  - 100% of U.S. top 20 box office hits each year from 2002-2012
  - 99% of 2013 U.S. top 100 box office hits
  - 98% of the AFI’s top 100 critically acclaimed films
  - 98% of the Oscar winners for best picture
  - 98% of the top 60 independent films from 2013-2015
- As of December 2015, SNL Kagan found that 95% of the 857 unique popular, critically acclaimed and independent films reviewed were available via online services on at least five of the 47 service offerings reviewed.

### Chart 2: Summary Findings

	On at least one of the 47 online services reviewed	On at least five of the 47 online services reviewed	On at least one of the online VOD services reviewed	On at least one of the TVE services reviewed
Films	98%	95%	97% (up from 94% in 2013)	96%
TV series	94%	84%	93% (up from 85% in 2013)	82%

### 1.2 Film titles on online VOD

- As of December 2015, SNL Kagan found that 97% of the 819 unique premium films (excluding independents) reviewed were available via online VOD distribution on at least one of the 33 service offerings studied.
- This is a higher proportion than the situation two years ago when in December 2013, KPMG found that 94% of 808 premium films were available digitally.

### 1.3 Film titles on TV Everywhere on-demand services

- In addition to the analysis of current availability of premium films on online VOD services, SNL Kagan expanded its focus to include digital availability on TV Everywhere on-demand services.
- As of December 2015, SNL Kagan found that 96% of the 857 unique premium films reviewed were available via TV Everywhere on demand on at least one of the 14 service offerings studied.

## KEY FINDINGS – TV SERIES

### 2.1 TV series on online VOD and TV Everywhere on-demand services

As of December 2015, SNL Kagan found that 94% of the 933 popular and critically acclaimed TV series reviewed were available via online services on at least one of the 36 online VOD and TV Everywhere on-demand services studied.

- The availability of TV series in certain sub-samples was as follows:
  - 100% of pre-2011 modern TV hits
  - 99% of U.S. top 100 popular TV series hits from each year 2013 to 2015
  - 98% of 2012 top 100 popular TV series
  - 96% of 2011 top 100 popular TV series
- We found that 84% of the 933 popular and critically acclaimed TV series reviewed were available via online services on at least five of the 36 services studied.

### 2.2 TV series on online VOD

- SNL Kagan found that 93% of the 933 premium TV series reviewed were available via online VOD on at least one of the 22 services studied.
- This is a higher proportion than the situation two years ago when in December 2013, KPMG found that 85% of 724 premium TV series were available digitally.

### 2.3 TV series on TV Everywhere on-demand services

- In addition to the analysis of current availability of premium TV series on online VOD services, SNL Kagan expanded its focus to include digital availability on TV Everywhere on-demand services.
- As of December 2015, SNL Kagan found that 82% of the 933 premium TV series reviewed were available via TV Everywhere on demand on at least one of the 14 service offerings studied.

### Digital availability of premium and independent films

There is a high proportion of popular, critically acclaimed and independent films available through dozens of online video services.

When film titles that appeared in more than one sub-sample were excluded, the total sample of unique films was 857, of which 98% were available on at least one of the 47 online video offerings reviewed.

Of the 857 unique film titles at the time of sampling, only 17 of those film titles were not available online. Based on our experience, we believe that the unavailability of these online included titles where the rights owners decided not to make these films available online for commercial reasons, or were titles where complicated rights between various rights owners (e.g., film distributors, producers and music companies) needed to be negotiated and cleared before such film titles could be made available in a digital format.

In terms of the popular film titles, 96% of the 2015 top 100 U.S. box office hits; all of the 2014 top 100; 99% of the 2013 top 100; all of the top 20 in each of the years 2002 to 2012; and 96% of the all-time U.S. box office hits were available on at least one of the 47 online video service reviewed at the end of 2015 (October – December 2015).<sup>4</sup>

In terms of critically acclaimed film titles, 98% of the Oscar winners for best picture and 98% of the AFI's top 100 films were available on at least one of the 47 online services at the end of 2015.

Of the top 60 independent films between 2013 and 2015, 98% were available on at least one of the 47 online services at the end of 2015.<sup>5</sup>

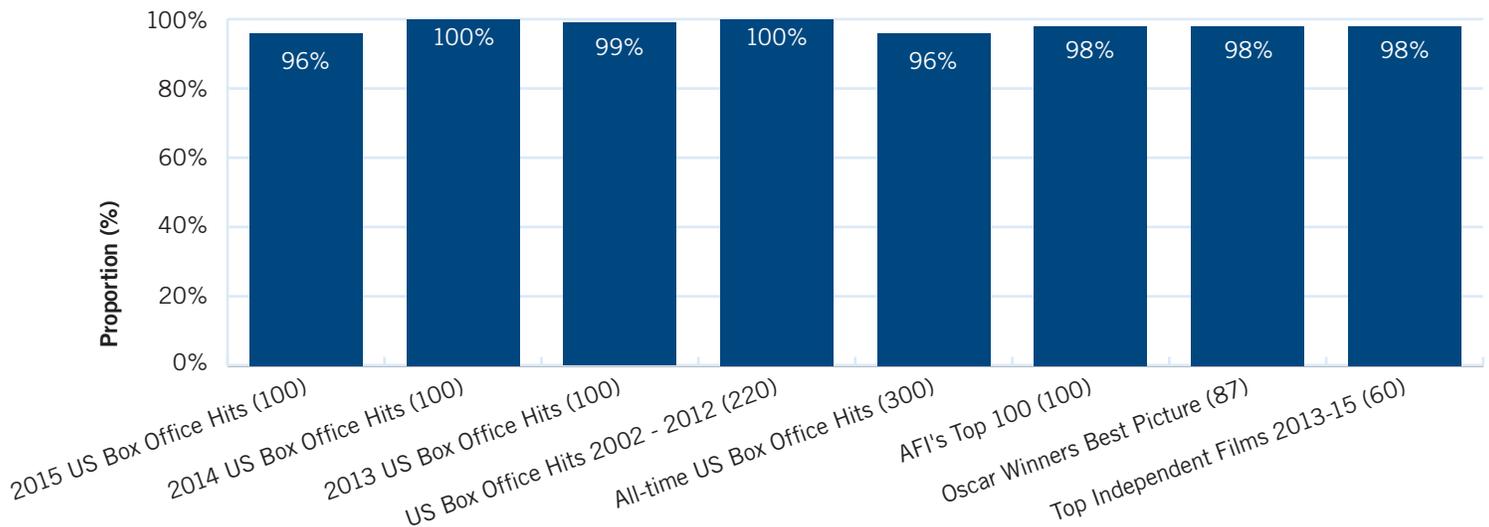
The eight sub-samples shown above were selected to represent the most popular, critically acclaimed and Independent film titles. There were, inevitably, films that appeared in more than one of the sub-samples. For example, “Ben-Hur” (1959) was an Academy Award best picture winner, appeared in the AFI’s list of top 100 films, and was one of the 300 ‘All-time box office hits.’<sup>6</sup>

4 The 47 online video services include 33 legitimate online VOD offerings and 14 TV Everywhere on-demand services provided by pay TV providers and TV channels.

5 The top 60 independent films were made up of the top 20 independent box office hits in each of the years 2013, 2014 and 2015, as compiled by Indiewire.

6 The list of “All-time U.S. box office hits” was compiled after SNL Kagan adjusted gross box office hits to take account of inflation. See methodology section for further details.

**Chart 3: Proportion of popular, critically acclaimed and independent film titles available on at least one U.S. online video service, as of December 2015**



Source: SNL Kagan (December 2015)

Notes: The eight sub-samples shown above were selected to represent the most popular, critically acclaimed and independent film titles. The online availability of all 1,067 film titles were reviewed on 33 online VOD and 14 TV Everywhere On-demand services – a total of 47 online video services. There were, inevitably, films that appeared in more than one of the sub-samples. When we excluded all such films that appeared in more than one sub-sample, SNL Kagan’s total sample of unique films was 857.

The numbers in parentheses depict the number of individual film titles in the sub-sample.

## Digital availability of premium and independent films across multiple online categories

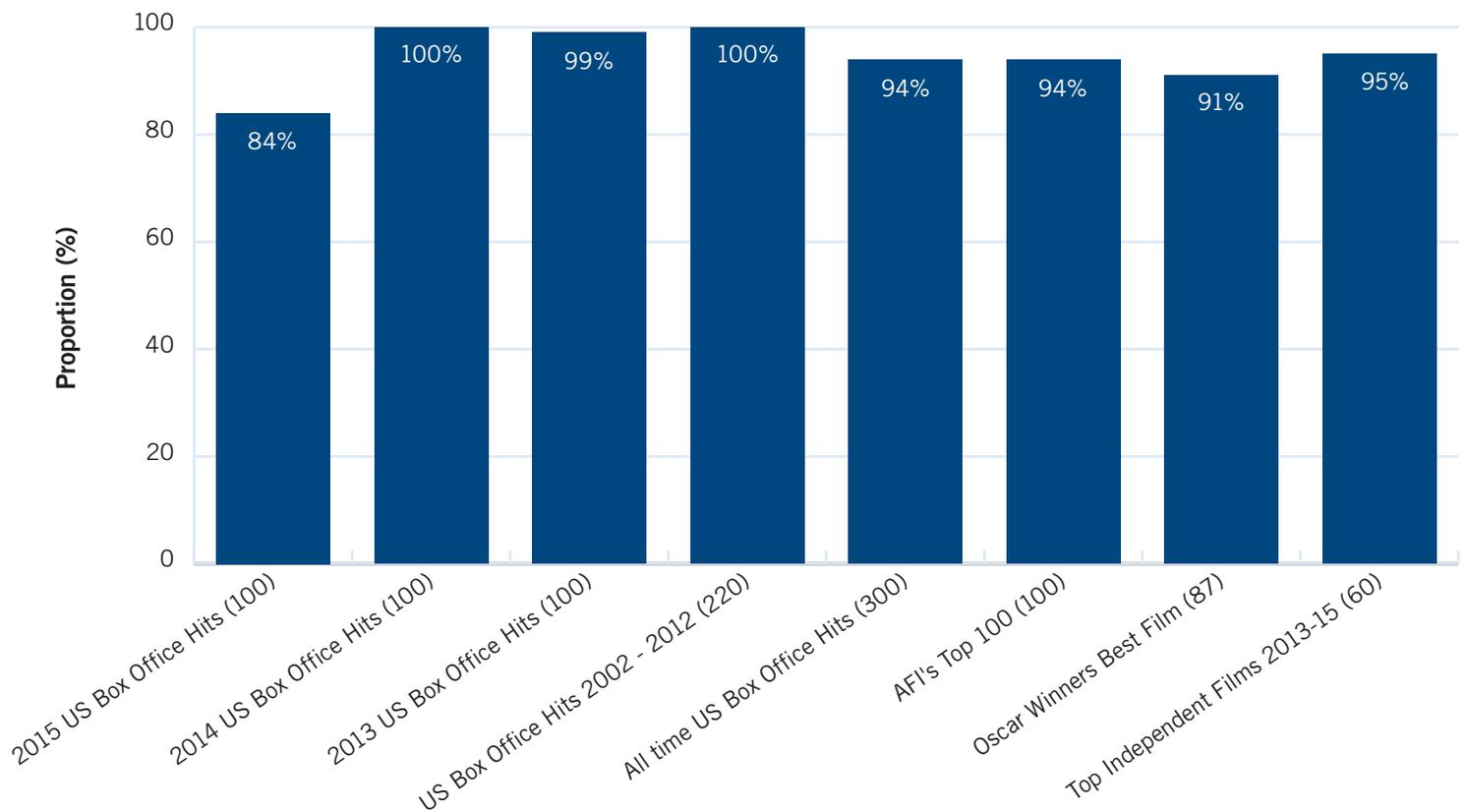
Popular, critically acclaimed and independent films are widely available via online services to U.S. consumers, as our findings show that 95% of premium and independent films were available via online services on at least five of the 47 service offerings reviewed.

In terms of the most popular film titles, 84% of the 2015 top 100 U.S. box office hits; 100% of the top 100 in 2014; 99% of the top 100 in 2013; 100% of the top 20 in each of the years 2002 to 2012; and 94% of the all-time U.S. box office hits were available on at least five of the 47 online services at the end of 2015.

In terms of critically acclaimed film titles, 91% of the Oscar winners for best picture and 94% of the AFI's top 100 films were available on at least five of the 47 online services at the end of 2015.

Of the top 60 independent films between 2013 and 2015, 95% were available on at least five of the 47 online services at the end of 2015.

**Chart 4: Proportion of popular, critically acclaimed, and independent film titles available on at least five U.S. online video services, as of December 2015**



Source: SNL Kagan (December 2015)

Notes: The eight sub-samples shown above were selected to represent the most popular, critically acclaimed, and independent film titles. The online availability of all 1,067 film titles were reviewed on 33 online VOD and 14 TV Everywhere On-demand services – a total of 47 online video services. There were, inevitably, films that appeared in more than one of the sub-samples. When we excluded all such films that appeared in more than one sub-sample, SNL Kagan's total sample of unique films was 857.

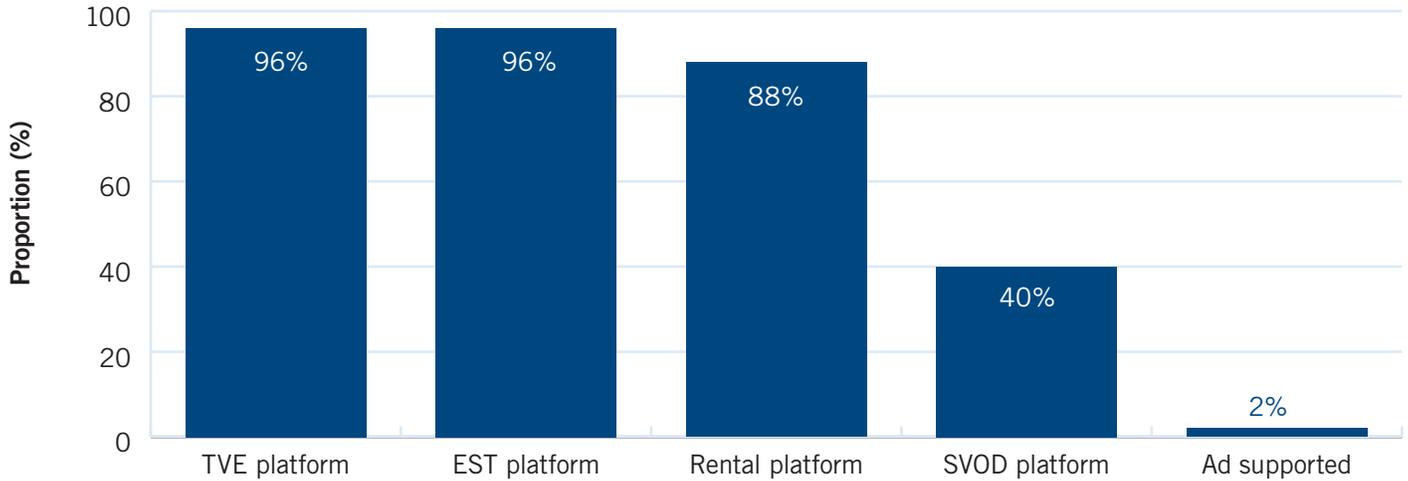
The numbers in parentheses depict the number of individual film titles in the sub-sample

## Digital availability of premium and independent films by online categories

We found that the majority of popular, critically acclaimed and independent film titles were available on the two online transactional categories: 96% were available on EST and 88% via online rental; and on TVE on-demand services, 96%.

A lower proportion of popular, critically acclaimed and Independent films were offered under the SVOD model (40%) and fewer still under the advertising-supported VOD model (2%).

**Chart 5: Proportion of popular, critically acclaimed and independent film titles (1,067 titles) available on at least one of the online video distributors by business model, as of December 2015**



Source: SNL Kagan (December 2015)

Notes: The sample of 1,067 popular, critically acclaimed and independent film titles was made up of the top 100 U.S. box office hits of each of the years 2013, 2014 and 2015 (300 titles); plus the top 20 U.S. box office hits from each year from 2002 to 2012 (220 titles); plus the All-time top 300 U.S. box office hits, inflation adjusted (300 titles); plus the AFI's top 100 critically acclaimed films (100 titles); plus the 87 Academy Award winners for best picture (87 titles); plus the top 20 independent box office hits of each of the years 2013, 2014 and 2015 (60). See methodology section for further details.

## Trends in availability across online categories

There has been an increase in the number of digital film titles made available to U.S. consumers when compared to a similar survey carried out by KPMG two years ago.

In KPMG’s survey of two years ago (“Film and TV title availability in the Digital Age” published in August 2014), TV Everywhere on-demand services (services from pay TV providers and TV channels) were not covered.

However, since SNL Kagan conducted its 2015 study using the same methodology and data coverage as KPMG did two years ago, SNL Kagan is able to make some like-for-like comparisons using the updated results for premium titles on online VOD services.

Comparing like for like, there are proportionately more popular and critically acclaimed film titles available in the transactional EST, transactional rental and SVOD categories. The highest growth being in SVOD where digital availability increased from 16% in December 2013 to 39% in December 2015. This increase is mainly due to the launch of new SVOD services during 2015 from HBO, Showtime and Sling TV.

**Chart 6: Proportion of popular and critically acclaimed film titles (1,007 titles) available on at least one of the online video distributors by business model, as of December 2013 and December 2015**

Online Category	Digital availability as of December 2013	Digital availability as of December 2015	Percentage point number change in two years
EST	94%	96%	+2%
Rental	77%	88%	+11%
SVOD	16%	39%	+23%
Ad-supported	3%	1%	(2%)

*Note that to make like-for-like comparisons with data findings from two years ago, the current digital availability of the 60 independent film titles has been excluded from the figures above.*

SNL Kagan’s latest survey found that in most sub-samples of popular and critically acclaimed films, the proportion available online increased to 97% in 2015, from an already high proportion of availability, 94%, in 2013.

As mentioned above, the sub-samples shown above were selected to represent the most popular and critically acclaimed film titles; however, there were films that appeared in more than one of the sub-samples.

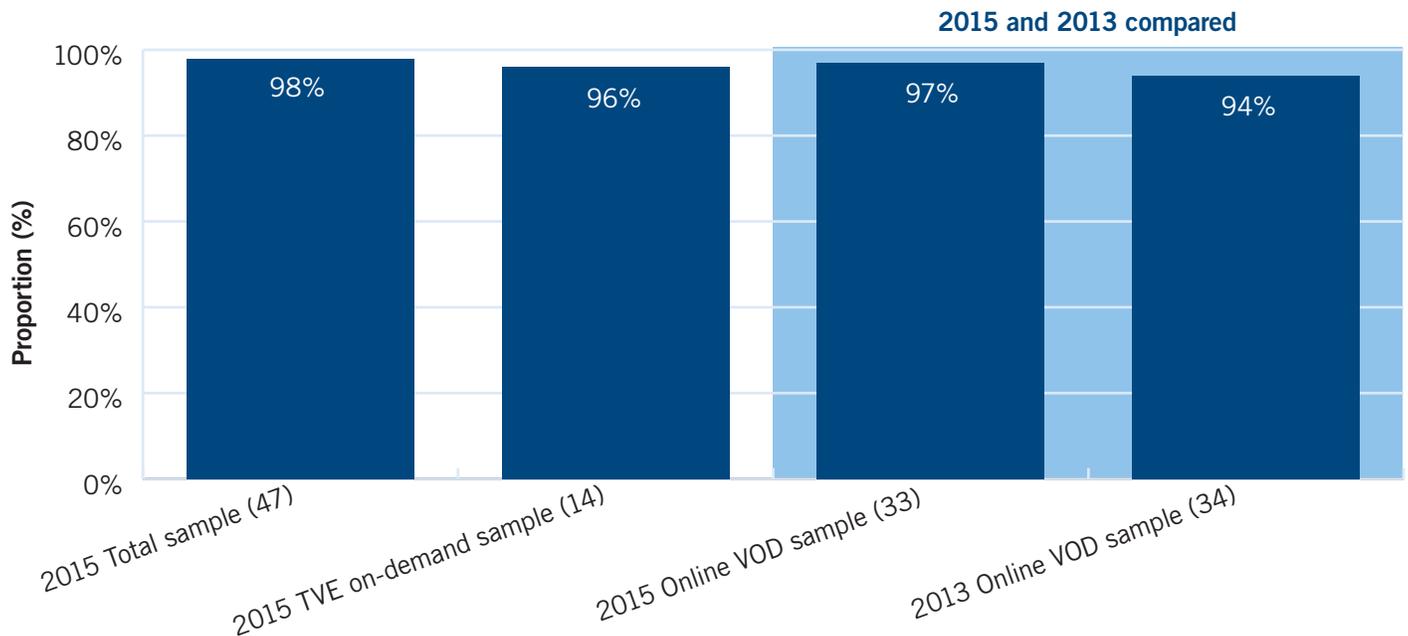
When film titles that appeared in more than one sub-sample were excluded, the total sample of unique “premium” films

(excluding independent films) was 819, of which 97% were available on at least one of the 33 online VOD offerings reviewed<sup>7</sup>.

This is a higher proportion than the situation two years ago when in December 2013, it was found that 94% of 808 premium films were available digitally on 34 online VOD services.

<sup>7</sup> To make like-for-like comparisons with data findings from two years ago, the current digital availability of the 60 independent film titles has been excluded.

**Chart 7: Proportion of unique “premium” film titles available on at least one online VOD offering, as of December 2013 and December 2015, and on at least one online service provided by TV Everywhere on-demand services**



Source: SNL Kagan (December 2015)

Notes: In KPMG’s study of 2013, a total of 808 unique films were reviewed for availability on 34 online VOD service offerings studied. SNL Kagan’s most recent study reviewed the availability of 819 unique films (excluding independents) on 33 online VOD services and 14 TV Everywhere on-demand services. The numbers in parentheses depict the number of individual online sources by category.

### Availability of popular and critically acclaimed TV series

SNL Kagan looked up the online availability of 933 TV series during November and December 2015 and found that 877 (94%) were available in part or whole on at least one of the 36 online VOD and TV Everywhere on-demand services analyzed.

Eleven legitimate online video services offered film titles only on an online rental basis (i.e. TV Series were not marketed on an online rental platform). As a result, our total sample bases consisted of 47 online services for the analysis of digital film title availability and 36 online services for digital TV Series availability.

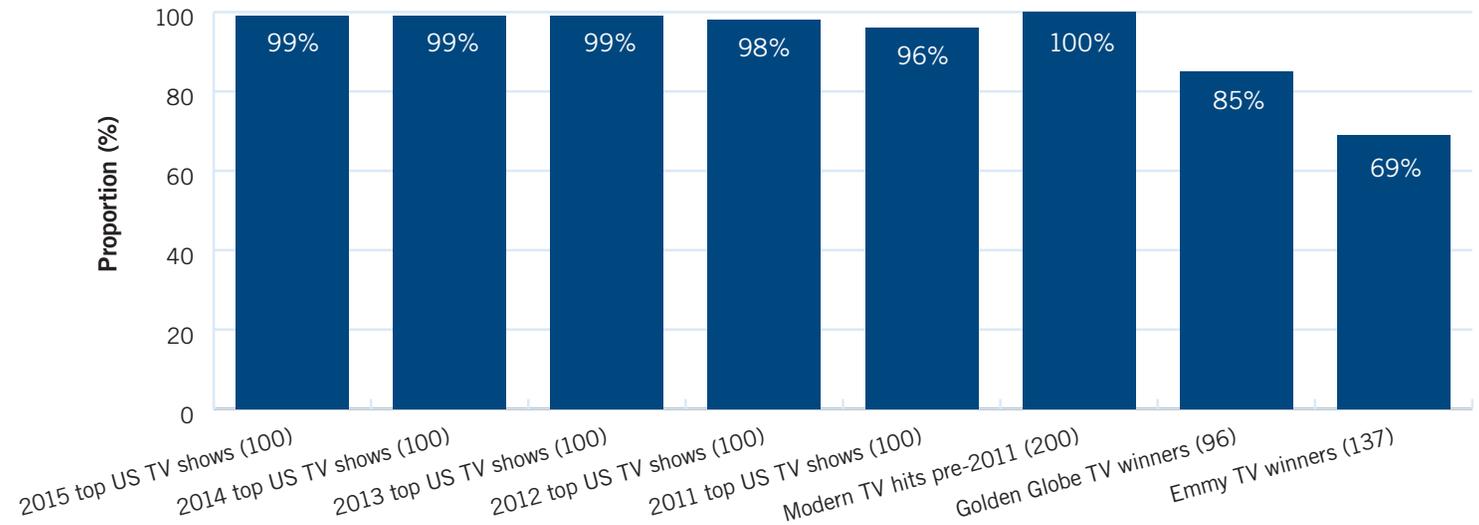
A high proportion of popular TV series were available online, we found that 99% of popular TV series in 2013, 2014, and 2015 (current season episodes only) were available on at least one of the 36 online services we researched. From a list of top 200 popular TV series, we found that all of them were available on at least one legitimate online service, and that

98% of the top 100 TV series of 2012 and 96% of the top TV Series of 2011 were available on a digital online service.

In terms of critically acclaimed TV titles, lower proportions of online availability were found, with 85% of Golden Globe TV winners and 69% of Emmy TV winners being available on at least one of 36 online video services. This was because the samples of Golden Globe and Emmy TV winners included older TV series, when compared to TV series in the other sub-samples.

In conducting this research, we found that there were instances when a TV season was only partially available online (i.e., not all the episodes of a TV season were made available). We therefore investigated further to see if there were any material differences when we took account of partial availability of TV series, and found that there were none.

**Chart 8: Proportion of popular and critically acclaimed TV series available on at least one of the 36 U.S. online video services as of December 2015 (Availability of complete TV series only)**



Source: SNL Kagan (December 2015)

Notes: The numbers in parentheses depict the number of individual TV titles in the sub-sample. A total of 933 TV titles were reviewed.

### Availability of popular and critically acclaimed TV series across multiple online categories

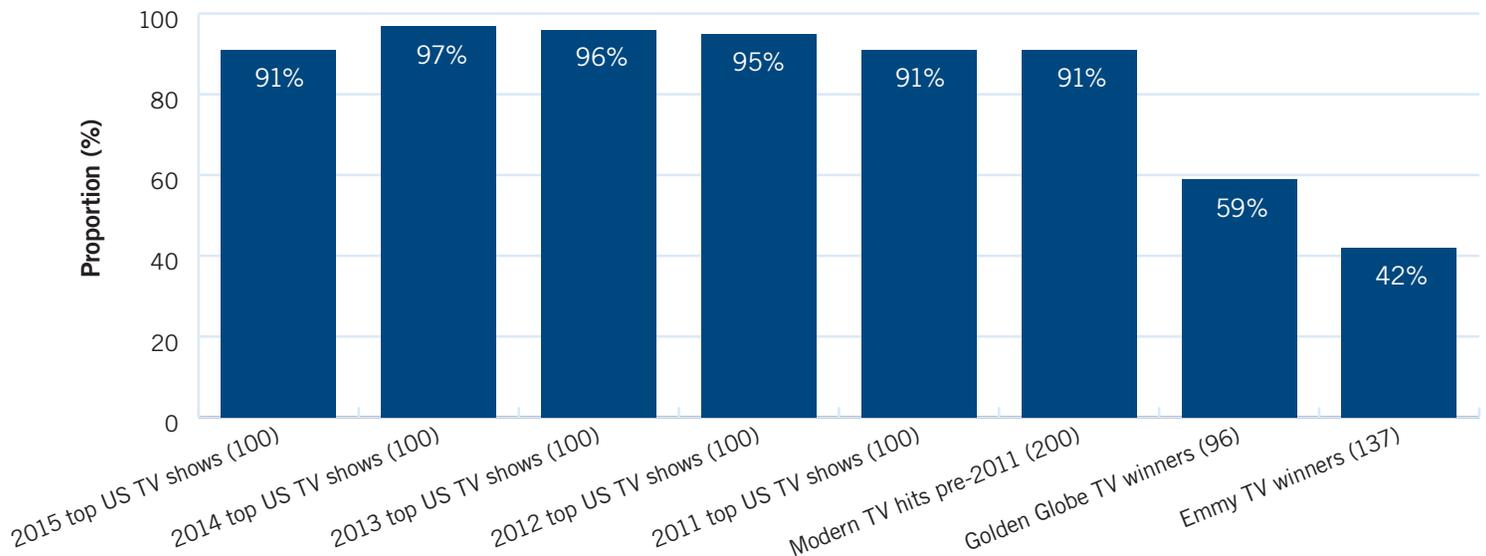
SNL Kagan investigated the online availability of 933 TV series during November and December 2015 and found that 84% were available in part or whole on at least five of the 36 online VOD and TV Everywhere on-demand services analyzed.

A high proportion of popular TV series were available online – we found that 91% of popular TV series in 2015 (current season episodes only); 97% of popular TV series in 2014; and 96% of popular TV series in 2013 were available on at least five of the 36 online services we researched. From a list of top

200 popular TV series, we found that 91% were available on at least five legitimate online services, and that 95% of the top 100 TV series of 2012 and 91% of the top TV series of 2011 were available on a digital online service.

In terms of critically acclaimed TV titles, lower proportions of online availability were found with 59% of Golden Globe TV winners and 42% of Emmy TV winners being available on at least five of 36 online video services.

**Chart 9 : Proportion of popular and critically acclaimed TV series available on at least five of the 36 U.S. online video services, as of December 2015 – Availability of complete TV series only (%)**



Source: SNL Kagan (December 2015)

Notes: The numbers in parentheses depict the number of individual TV titles in the sub-sample. A total of 933 TV titles were reviewed.

## Trends across multiple online categories by sub-sample

SNL Kagan’s most recent survey has found that during the past two years, there has been an increase of eight percentage points in the availability of long-form legitimate “premium” TV Series in the U.S.

In 2013, KPMG found that 85% of premium TV series (618 out of 724 TV titles reviewed) were available on the 33 digital services they reviewed. Our most recent SNL Kagan survey found that a higher proportion, 93% of premium TV series (872 out of 933 TV titles) were available on the 22 comparable digital services we analyzed. (See methodology section for further details.)

SNL Kagan found that the greatest increase in the proportion of premium TV series availability (popular and critically acclaimed TV series) was in the most recent popular TV series sub-sample (popular TV hits that were 0-12 months old when the survey was conducted). This relatively high proportion of digital availability and greatest increase from two years ago is attributed to the availability of most recent top TV hits on digital services launched in 2015, namely HBO NOW and Showtime Anytime, and the earlier release of most recent TV hits on EST.

**Chart 10: Proportion of popular and critically acclaimed TV series available on at least one of the online video offerings, as of December 2013 and December 2015**

Sub-samples of popular and critically acclaimed TV series	Digital availability as of December 2013	Digital availability as of December 2015	Percentage point number change in two years
Most recent popular TV series (0-12 months old)	87%	99%	+12%
Popular TV series (13-24 months old)	96%	99%	+3%
Popular TV series (25-36 months old)	95%	99%	+4%
Modern TV hits (pre-2011)	96%	99%	+3%
Golden Globe TV winners	72%	84%	+12%
Emmy Award TV winners	62%	67%	+5%
<b>Total TV series sample</b>	<b>85%</b>	<b>93%</b>	<b>+8%</b>

### Availability across multiple online categories

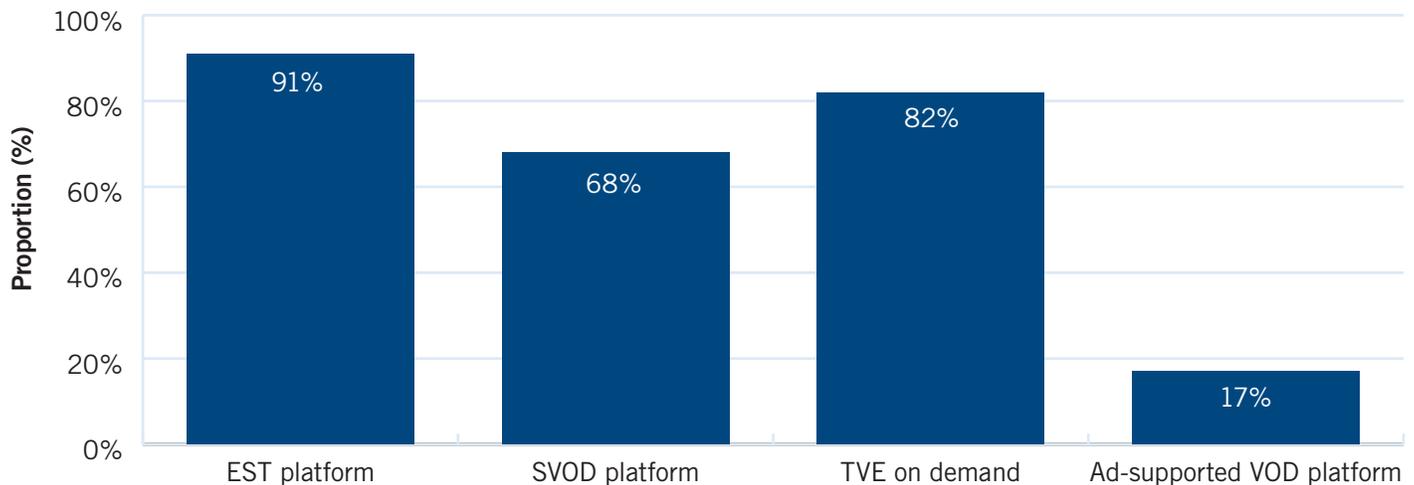
The highest proportion of popular and critically acclaimed TV series by online category was via EST (91%). The next highest availability was through TV Everywhere on-demand services, where 82% of the 933 TV series were available on at least one of the offerings from pay TV operators and TV channels.<sup>8</sup>

When these findings are compared to a similar survey carried out by KPMG two years ago, SNL Kagan found that online availability increased markedly.

There are now more popular and critically acclaimed TV series available in the transactional EST, SVOD and ad-supported VOD categories than there were two years ago. The highest increase being in SVOD, where digital availability rose from 44% in December 2013 to 68% in December 2015. This increase is mainly due to the launch of new SVOD services during 2015 from HBO, Showtime, Starz and CBS.

<sup>8</sup> Pay TV operators (or MVPDs) offer a number of on-demand TV series via TV Everywhere services and online EST, online rental and free of charge with advertising to their pay TV subscribers. For the purpose of this study, we considered the availability of a TV series by any TV Everywhere and online business model provided by MVPDs.

**Chart 11: Proportion of popular and critically acclaimed TV series (933 titles) available on at least one of the online video distributors by category, as of December 2015**



Source: SNL Kagan (December 2015)

Notes: The sample of 933 popular and critically acclaimed TV titles was made up of top 100 TV hits of each of the years 2011 to 2015 (500 titles); plus 200 top TV hits pre-2011; plus 96 Golden Globe award winners; and 137 Emmy award winners. See methodology section for further details.

The largest ad-supported category is catch-up TV. However, this report does not cover free online catch-up TV (services from broadcast and cable networks to view a limited number of recent TV episodes at least a week after they are aired on TV channels).

**Chart 12: Proportion of popular and critically acclaimed TV titles available on at least one of the online video distributors, by business model, as of December 2013 and December 2015**

Online Category	Digital availability as of December 2013	Digital availability as of December 2015	Percentage point change in 2 years
EST	81%	91%	+10%
SVOD	44%	68%	+24%
Ad-supported VOD	5%	17%	+12%

## Methodology

### OUR APPROACH

SNL Kagan has undertaken a study with the objective of analyzing the current availability and quantifying the growth of film and television series on long-form legitimate online services in the U.S.

This study generally follows the KPMG study “Film and TV title availability in the Digital Age,” which was published in 2014, in terms of methodology and data coverage, updating the results for current online video services’ present day availability. In addition to the data and analysis in the prior study, SNL Kagan expanded its focus on film and television services to include TV Everywhere on-demand services.

SNL Kagan carried out research, looking up the availability of popular, critically acclaimed and independent film and TV titles between October 2015 and December 2015.

#### Definitions and references

SNL Kagan researched the supply of legitimate long-form digital content (film and TV titles) in the video industries made available by a number of online video distributors under different categories. The description of the categories under online video-on-demand (VOD) services is described below:

- **Transactional Electronic Sell-Through (EST)** – These are online services where consumers pay for a permanent ownership of a digital copy and/ or with unlimited access via a digital locker;
- **Transactional Online Rental** - These are online services where consumers pay for a digital copy to watch within a certain time period on a temporary basis online;
- **Subscription Video on Demand (SVOD)** – These are online services where consumers pay a subscription fee to access video content on an ongoing manner; and,
- **Ad-supported VOD** - These are online services where consumers can watch content free of charge with advertising.

SNL Kagan looked up the availability of popular, critically acclaimed and independent film and TV series on 33 online VOD services. In addition to covering the online VOD services, SNL Kagan expanded its coverage of online video distribution to include the availability of “premium” and independent content on:

- **TV Everywhere (TVE) on-demand services** – These are online services from pay TV providers (i.e. Multichannel Video Programming Distributors - MVPDs) or TV channels that allow the consumer to watch films/TV series via an authenticated, online service with their paid subscription<sup>9</sup>

#### Primary research on the availability of popular and critically acclaimed films

The methodology for selecting “premium” films (the most popular titles) was based on theatrical box office receipts. The methodology for selecting critically acclaimed films was based on industry awards and acclamations. The methodology for selecting Independent film titles was based on highest grossing theatrical box office receipts for “indie” films, as compiled by Indiewire.<sup>10</sup>

For premium films, excluding independents, we identified seven sub-samples – a total of 1,007 individual film titles – and then looked-up the availability of each of these film titles across 33 legitimate online VOD and 14 TV Everywhere on-demand services in the U.S. The seven sub-samples of film titles were made up in the following way:

- **Popular recent film releases – hits of 2015 (100 titles)** - Sample of 100 feature films – top 100 U.S. box office hits of 2015 from Jan. 1 - Sept. 30, 2015<sup>11</sup>
- **Popular recent film releases – hits of 2014 (100 titles)** - Sample of 100 feature films – top 100 U.S. box office hits of calendar year 2014
- **Popular recent film releases – hits of 2013 (100 titles)** - Sample of 100 feature films – top 100 U.S. box office hits of calendar year 2013
- **Popular film releases from the recent past (220 titles)** - Sample of 220 feature films – top 20 U.S. box office hits in each of the years from 2002 to 2012
- **Most popular film releases of all time (300 titles)** - Sample of 300 – top 300 U.S. box office film hits of all time (inflation-adjusted box office receipts)
- **Critically acclaimed films (100 titles)** - Sample of 100 films – includes American Film Institute’s top 100 films
- **Critically acclaimed films (87 titles)** - Sample of 87 films – includes all 87 of Academy of Motion Picture Arts and Sciences Awards (Oscar winners) for best picture

9 MVPDs offer a number of on-demand films and TV series via TV Everywhere services and online EST, online rental, and free of charge with advertising to their pay TV subscribers. For the purpose of this study, we considered the availability of a film or TV title by any TV Everywhere and online business model provided by MVPDs. Note that some MVPDs offered only online rental (DIRECTV, Time Warner Cable and Cablevision) and some online offerings by a number of business models (Comcast XFINITY and Verizon).

10 Independent films include specialty films (indie, foreign and/or documentary) that opened in limited release (initially change under to fewer than 500 screens) in North America and were released by an independent distributor or a studio specialty division.

11 In order to complete the survey of digital availability by the end of 2015, SNL Kagan conducted its research in October to November 2015, and looked-up the availability of the most recent box office hits (2015), defined as box office hits from Jan. 1 - Sept. 30, 2015.

When SNL Kagan excluded all films that appeared in more than one sub-sample, our total sample of unique films was 819.

### Primary research on the availability of independent Film titles

In addition to investigating the online availability of “premium” films (popular and critically acclaimed films), SNL Kagan looked up the digital availability of a sample of independent films. This was made up in the following way:

- **Independent films (60 titles)** - Sample of 60 films – includes the 20 highest grossing indie films in each of the years 2013, 2014 and 2015, as compiled by Indiewire

Once again we looked up the availability of each of these film titles across 33 legitimate online VOD and 14 TV Everywhere on-demand services in the U.S.

### Primary research on the availability of popular and critically acclaimed TV titles

In determining the online availability of premium TV titles in the U.S, SNL Kagan compiled lists of popular TV series (as measured by TV ratings) and award-winning TV series. We identified eight sub-samples – a total of 933 individual TV Series – and then looked up the availability of each of these TV titles on 22 legitimate online VOD offerings and 14 TV Everywhere on-demand services from pay TV operators and TV channels.

As TV series are not commonly offered via online rental in the U.S., we did not research the online availability of TV series via the online rental category.<sup>12</sup>

The eight sub-samples of TV series were made up in the following way<sup>13</sup>:

- **2015 Currents** - top TV series on broadcast and cable networks (100) - Sample of 100 TV programs from 2015 (Jan. 1 - Sept. 30) – top 40 shows on broadcast networks; Top 40 shows on basic cable networks; Top 20 shows on premium cable networks

- **2014 Currents – top TV series on broadcast and cable networks (100)** - Sample of 100 TV programs from calendar year 2014 – top 40 shows on Broadcast Networks; Top 40 shows on Basic Cable Networks; Top 20 shows on Premium Cable Networks
- **2013 Currents – top TV series on broadcast and cable networks (100)** - Sample of 100 TV programs from calendar year 2013 – top 40 shows on Broadcast Networks; Top 40 shows on Basic Cable Networks; Top 20 shows on Premium Cable Networks
- **2012 Currents – top TV series on broadcast and cable networks (100)** - Sample of 100 TV programs from calendar year 2012 – top 40 shows on Broadcast Networks; Top 40 shows on Basic Cable Networks; Top 20 shows on Premium Cable Networks
- **2011 Currents – top TV series on broadcast and cable networks (100)** - Sample of 100 TV programs from calendar year 2011 – top 40 shows on Broadcast Networks; Top 40 shows on Basic Cable Networks; Top 20 shows on Premium Cable Networks
- **Modern TV Hits – Pre 2013 (200)** – Sample of 200 TV series compiled from a number of sources: a combination of top 100 TV series ranked on Internet Movie Database ([www.imdb.com](http://www.imdb.com)) and top 10 regularly scheduled prime-time drama and sitcom TV programs on broadcast, cable and premium network TV
- **Critically Acclaimed, Golden Globe winners (96)** – Sample includes the 96 Drama and Comedy Golden Globe winners from the 1969/70 to the 2014/15 TV season
- **Critically Acclaimed – Emmy TV winners (137)** – Sample includes Drama, Variety and Comedy TV show Emmy award winners from 1990/91 to 2014/15

<sup>12</sup> This explains the difference between the total number of online VOD offerings between our research on film titles (where there were 33 online VOD offerings) and our research on TV Series (where there were 22 online VOD offerings)

<sup>13</sup> The lists for popular TV series were compiled from data on TV ratings success, as identified by industry commentators and analysts, and published in trade media (*Variety*, [tvbynumbers.com](http://tvbynumbers.com), *Hollywood Reporter*, *Los Angeles Times* etc.). Other sources included lists and ratings data of top TV series provided by TV studios and leading TV channels. The TV series ranked for popularity exclude repeats, specials, films, news and sports, reality live events, and programs with less than three telecasts.

**Checking the availability on online video distributors**

The 47 legitimate online video offerings from 30 different online video distributors included in our sample are listed below by each of the categories:<sup>14</sup>

**Ad-supported VOD**

CBS.com  
Crackle  
Hulu  
SnagFilms

**Subscription VOD**

Amazon Prime  
CBS All Access  
HBO Now  
Hulu Plus  
Mubi  
Netflix Instant  
Showtime Now  
Sling TV

**Transactional EST**

Amazon Instant Video  
Apple iTunes  
CinemaNow  
Flixster  
Google Play  
M-Go  
Microsoft Movies & TV (formerly xBox Video)  
PlayStation Video (PlayStation Store)  
VUDU  
YouTube

**Transactional Rental**

Amazon Instant Video  
Apple iTunes  
Blockbuster  
CinemaNow  
Flixster  
Google Play  
M-Go  
Microsoft Movies & TV (formerly xBox Video)  
PlayStation Video (PlayStation Store)  
VUDU  
YouTube

**TV Everywhere On Demand**

Bright House Networks  
Cablevision (Optimum)  
Charter  
Cox Communications  
DIRECTV  
DISH Network TV  
HBO GO  
PlayStation Vue  
Showtime Anytime  
Starz Play  
Time Warner Cable  
U-verse Online (AT&T)  
Verizon On Demand  
XFINITY (Comcast)

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<sup>14</sup> TV series are not commonly offered via an online transactional rental offering in the U.S. Consequently, SNL Kagan did not research the online availability of TV series via the online rental category.

## Glossary

**Authentication** – A process used by content owners and MVPDs to verify a pay TV user’s credentials (via user accounts, unique customer IDs, etc.) before allowing access to view TV Everywhere long-form video content through connected devices

**Ad-Supported Video on Demand** – A media distribution business model that provides online access to video content free-of-charge in return for viewers seeing intermittent advertisements as they stream content

**Box Office Hits** – The popularity of films as measured by: Total cinema gross ticket revenue sales for films screened commercially at theaters

**Catch-up Content** – TV video content that is made available online sometime after it has already been aired on a TV channel

**Connected Devices** – Devices with built-in connections to the Internet that enable users to access Web-hosted content or information. These devices usually augment traditional forms of content delivery. Examples include smartphones, tablets, gaming consoles and TV sets

**Digital Locker** – A system for storing content online (which could be cloud-based) whereby content could be retrieved from any device over the Internet

**Electronic Sell-Through (EST)** – A media distribution business model whereby consumers pay a one-time fee to download a piece of digital content for permanent storage and viewing

**Golden Globe Awards** – An annual media award presented by the members of the Hollywood Foreign Press Association (HFPA) recognizing excellence in film and television, for both domestic (U.S.) and foreign content

**Independent Film** – A film produced without the creative or financial input from any of the major U.S. Studios (Walt Disney Studios Motion Pictures, Paramount Pictures Corporation, Sony Pictures Entertainment Inc., Twentieth Century Fox Film Corporation, Universal City Studios LLC, and Warner Bros. Entertainment Inc.)

**Linear Programming** – Traditional TV programming where the user watches content as per a fixed schedule (scheduled TV programming)

**Long-Form Video Content** – Professional video content that runs over a specific duration such as a full-length feature film (typically 90 minutes or longer) or a full episode of a TV show (typically 20-30 minutes for a Comedy show or 40 to 60 minutes for a Drama program). Excludes trailers, short clips and user-generated content

**Live Online Streaming** – The streaming of video content through the Internet at the same time that the content is being aired on TV

**Majors** – Refers to MPAA member film studios including their subsidiaries [e.g., including Focus (NBCU) and Screen Gems (Sony Pictures)]

**Motion Picture Association of America** – MPAA member film studios include: Walt Disney Studios Motion Pictures, Paramount Pictures Corporation, Sony Pictures Entertainment, Inc., Twentieth Century Fox Film Corporation, Universal City Studios LLC, and Warner Bros. Entertainment Inc.

**Multichannel Video Programming Distributor (MVPD)** – also referred to as pay TV operator. These include cable, satellite and telecom operators retailing pay TV video services to U.S. households

**Non-Theatrical Exhibition** – Screenings of films in a non-traditional cinema environment such as film societies, community groups, village halls, etc., to specific members; not advertised generally to the public

**Online In-Home viewing** – The ability for consumers to stream video content to connected devices within their own homes using the same Wi-Fi network that connects the pay TV operator’s set-top box

**Online Out-of-Home Viewing** – The ability for consumers to stream video content to connected mobile devices from outside their homes, using any Wi-Fi network or cellular network (in some cases, out-of-home viewing is possible only on specific cellular networks, depending on the arrangements between the pay TV operators and the cellular operators)

**Online Rental** – A media distribution business model whereby consumers pay for a digital copy of a movie/TV show through the Internet and view it on a temporary basis. The content is available on the user’s device for playback within a stipulated period of time after purchase and expires after a stipulated period from the time playback begins

**Pay TV Operator** – also referred to as MVPD. These include cable, satellite and telecom operators retailing pay TV video services to U.S. households

**Premium Cable Networks** – Cable networks (such as HBO, Cinemax, Starz, Showtime, etc.) that encrypt their signals to restrict viewership to only those subscribers who pay an additional monthly subscription fee

**Release Windows** – The period of time after the primary release (theatrical release for films and network runs for TV series) that content distributors must adhere to before releasing films/TV series to extended delivery platforms such as DVDs, pay TV, VOD, etc.

**Subscription Video On Demand (SVOD)** – A media distribution business model whereby consumers sign up and pay a monthly fee to access a certain amount of video content online. Examples of providers include Netflix, Hulu Plus and Amazon Prime Instant Video

**TV Everywhere (TVE)** – Services that allow pay TV customers to view authenticated long-form television content (live linear streams or time shifted catch-up/on-demand titles) on multiple connected devices inside or out of the home

**Video On Demand (VOD)** – A service that allows consumers to view video content at their convenience. Unlike traditional linear programming, users can pause, rewind and fast-forward content to suit their preferences. VOD services can be accessed through the traditional set-top box for viewing on the TV set, or through the Internet for viewing on a wide array of connected devices

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