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

Press Release

Strasbourg, 21 January 2015

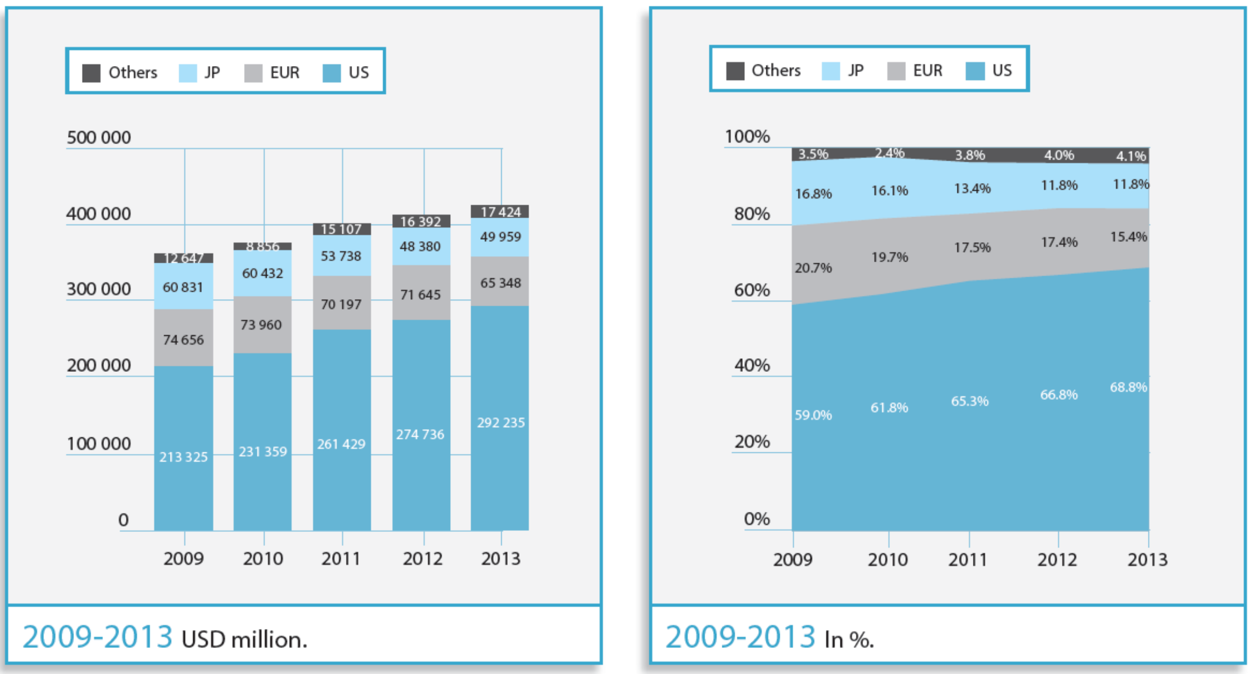
The European Audiovisual Observatory publishes the 20th edition of its Yearbook

- **Over the last five years (2009-2013), the European audiovisual groups lost 5.3% of their global market share.**
- **Despite the rapid rise in on-demand services in 2013, the audiovisual sector experienced its second year of stagnation.**
- **Between 2008 and 2012, the operating revenues of the non-European groups established in the European Union rose from EUR 48.2 to 53.1 billion.**

The European Audiovisual Observatory has just published the 20th edition of its Yearbook*. Television, cinema, video and on-demand audiovisual services.*

This reference publication contains pan-European figures (on 40 countries) on the various branches of the sector. Using the different indicators available, the Observatory reveals that the entire audiovisual sector experienced a second year of stagnation in 2013. For the third year running, the market generated revenues in the order of EUR 133 billion, with even, for the first time, a very slight fall in its revenues in 2013 (-0.1%). The sector most affected is physical video (-11.3%), but 2013 was also a year of recession for cinema receipts (-4.3%), video games (-1.8%) and broadcasting services (-0.5%). The growth in the activities of pay-TV platforms (+2.7%) and in the production of online VoD services (+46.1%) was unable to compensate for the decline in the other activities.

G.1.2 Breakdown of the audiovisual market worldwide
2009-2013 Includes activities in broadcasting, audiovisual on-demand services, film and TV production, distribution, exhibition, home video, recorded music, video games and retail of audiovisual products. Segments other than audiovisual (such as print publications, consumer electronics, cable networks, facilities) are not included.
Data not available for some large companies in Asia, Australia and Middle East.
USD million



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The stagnation of the European market and the fact that the two growth areas are mainly controlled by American groups means the European groups lost 2% of their global market share between 2012 and 2013 and a total of 5.3% between 2009 and 2013.

T.1.3 Size of the audiovisual market of the European Union (EUR 28) 2009-2013 EUR million.

	2009	2010	2011	2012	2013	*2013/12*	Sources
Broadcasters net revenues	**69 594**	**72 622**	**74 158**	**72 284**	**71 596**	***-1.0%***	OBS
Public broadcasters (incl. radio)	33 474	33 851	33 724	32 664	32 547	***-0.4%***	OBS
Advertising TV	19 613	21 163	21 713	21 151	20 656	***-2.3%***	OBS
Thematic channels	9 341	10 047	10 996	10 733	10 835	***0.9%***	OBS
Home shopping channels *est.*	2 453	2 610	2 719	2 792	2 813	***0.8%***	OBS
Local TV *est.*	1 326	1 395	1 350	1 278	1 138	***-10.9%***	OBS
Private radio *est.*	3 388	3 556	3 656	3 665	3 607	***-1.6%***	OBS
Consumers expenses for AVMS distribution services (incl. taxes) (1)	**27 950**	**31 417**	**33 362**	**35 427**	**36 374**	***2.7%***	OBS
Cable	11 212	11 844	12 201	12 790	12 869	***0.6%***	IHS
Satellite	13 874	15 689	16 336	16 913	17 255	***2.0%***	IHS
IPTV	1 785	2 375	3 222	4 029	4 525	***12.3%***	IHS
DTT	1 080	1 509	1 602	1 694	1 724	***1.7%***	IHS
Cinema gross box-office	**6 087**	**6 373**	**6 445**	**6 570**	**6 285**	***-4.3%***	OBS
Physical video (incl. taxes)	**8 359**	**8 037**	**7 405**	**6 758**	**5 991**	***-11.3%***	OBS
DVD retail (2)	6 691.4	6 179.6	5 511.5	4 868.1	4 214.6	***-13.4%***	IHS
DVD rental (2)	1 154	1024	876	722	563	***-22.0%***	IHS
Blu-ray disc retail (2)	499	807	980	1 118	1 170	***4.6%***	IHS
Blu-ray disc rental (2)	13.6	26.7	38.1	48.8	43.9	***-10.0%***	IHS
VoD online revenues (incl. taxes)	**248**	**462**	**648**	**1 045**	**1 526**	***46.1%***	OBS
Online on demand TV revenues	189	345	462	673	938	***39.4%***	IHS
Online on demand film revenues (3)	58.9	116.6	185.9	372.1	588.0	***58.0%***	IHS
Games (offline and online, excluding mobile and Apps)	**10 642**	**11 146**	**11 264**	**11 141**	**10 936**	***-1.8%***	IHS
Total	**122 881**	**130 057**	**133 281**	**133 223**	**132 708**	***-0.4%***	OBS
Growth		***5.8%***	***2.5%***	***0.0%***	***-0.4%***		

(1) Includes TV subscription, PPV and TV VoD revenues.
(2) Data related to 16 countries.
(3) Data related to 17 countries.

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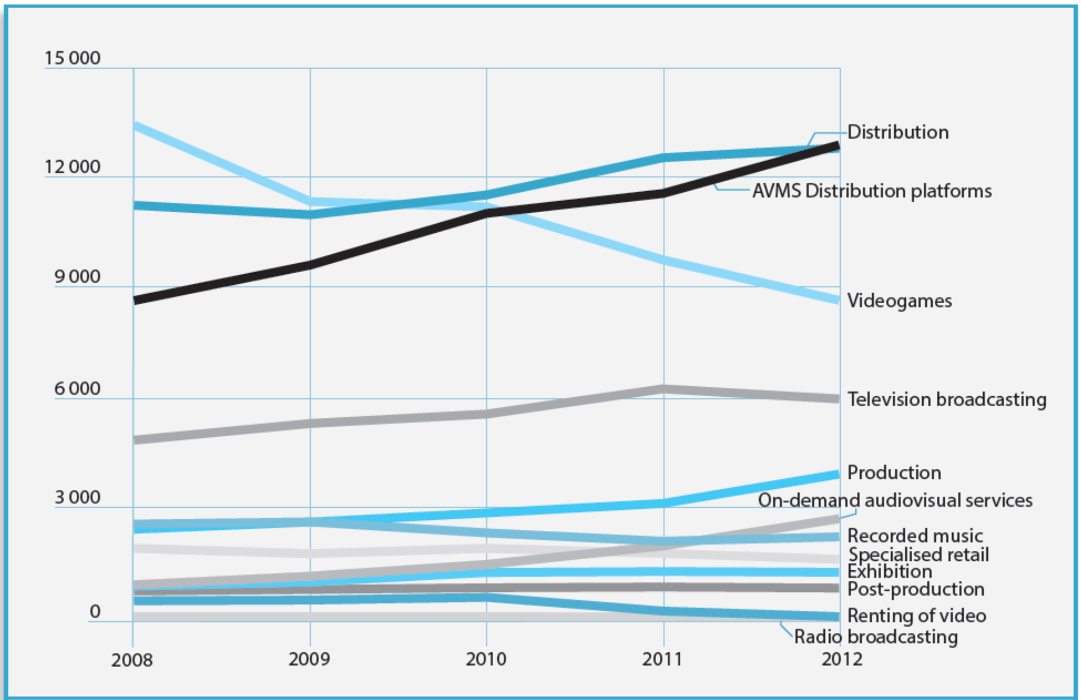
This year, this reference publication contains a significant innovation in the form of an analysis of the revenues generated in the European Union by the European subsidiaries of international groups. At the current point in time when the negotiations on the TTIP (Transatlantic Trade and Investment Partnership) are due to resume, it is worth attempting to produce more precise figures on some aspects of international trade in the area of audiovisual services. The Observatory has implemented a methodological approach proposed by the WTO, namely an analysis of FATS (Foreign Affiliates Statistics), which focuses on the various branches of the audiovisual sector: production, post-production, distribution, film exhibition, recorded music, radio, television, specialised retailing, videogram rentals, video games, on-demand audiovisual services and distribution platforms for audiovisual services. The satisfactory figures available for the analysis relate to the period 2008-2012 but suffice to illustrate the extremely rapid developments.

G.1.6 Operating revenues of FATS established in the EU by main audiovisual activity 2008-2012 EUR million.



2008-2012 EUR million.

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- The number of subsidiaries of foreign groups identified as established and operating in the European Union rose from 833 in 2008 to 1019 in 2013. The operating income of these companies went up from EUR 48.2 billion in 2008 to 53.1 billion in 2012.
- The number of subsidiaries of American groups operating in the European Union rose from 548 in 2008 to 666 in 2012. Their operating income increased from EUR 31.8 billion in 2008 to 40.1 billion in 2012.
- In 2012, the activities of distributors of audiovisual services (cable, satellite platforms) became the primary source of revenues of the subsidiaries of foreign groups in the European Union. At EUR 12.9 billion, the figure is slightly higher than for the more customary ways of distributing audiovisual programmes (EUR 12.8 billion).

Unfortunately, no data are available on the revenues of subsidiaries of foreign groups in the European Union (especially the United States).

Lange A., *Yearbook. Television, cinema, video and on-demand audiovisual services,* European Audiovisual Observatory, Strasbourg, 2014, ISBN 978-92-871-8017-9, EUR 185,00.

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The European Audiovisual Observatory

Set up in December 1992, the European Audiovisual Observatory's mission is to gather and distribute information on the audiovisual industry in Europe. The Observatory is a European public service body comprised of 40 member states and the European Union, represented by the European Commission. It operates within the legal framework of the Council of Europe and works alongside a number of partner and professional organisations from within the industry and with a network of correspondents. In addition to contributions to conferences, other major activities are the publication of a Yearbook, newsletters and reports, the compilation and management of databases and the provision of information through the Observatory's Internet site:. http://www.obs.coe.int

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