#OBSBXL23

Session 2: How has our reading of the sector changed?

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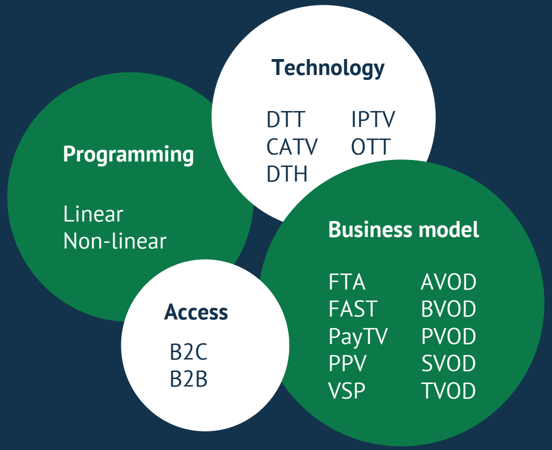
① LINEAR, ON-DEMAND OR HYBRID SERVICES?

AV services combine multiple types of programming, technology, business model and access

… in particular linear and on-demand access to programming.



ARE FILMS AND TV/SVOD SERIES THE SAME?

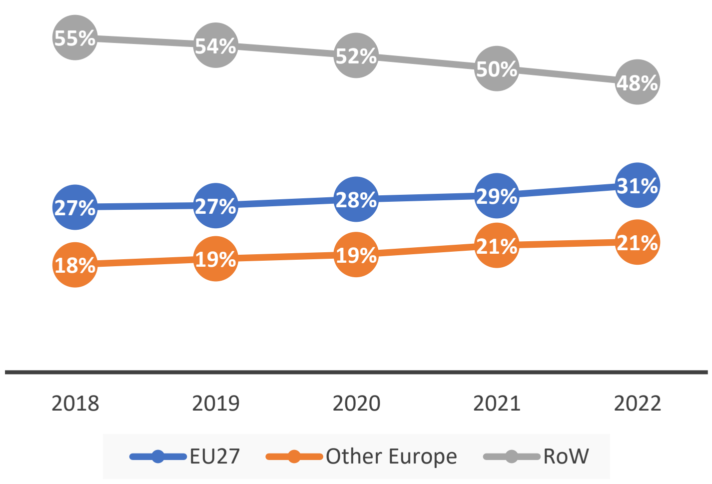
FILM	TV/SVOD SERIES
More co-productions	Less co-productions
Mostly small structures	Consolidation
Direct public funding key to financing	Service providers key to financing
Mix of direct public funding and production incentives	Mostly production incentives
Growth in volume	Strong growth in volume

European Audiovisual Observatory

DO EU AND OTHER EUROPEAN WORKS COMPETE?

The share of EU27 and other European works grew between 2018 and 2022

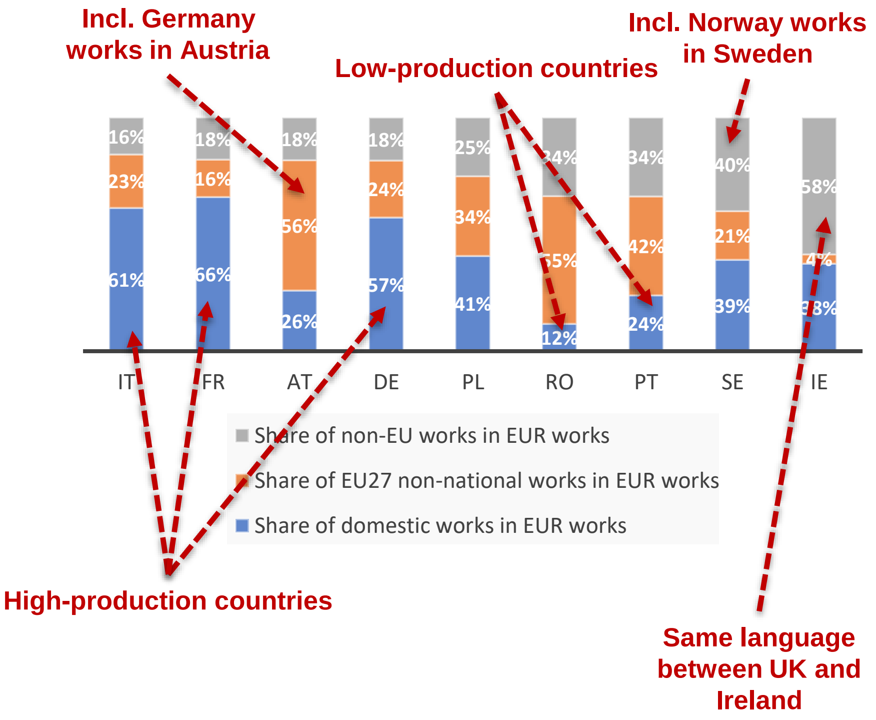
Share of works broadcast on TV by origin (sample: 555 channels)



Not a measurement of quotas: no reruns, number of titles and not minutes.

Diversity of situations between countries

Share of European works on TV by origin (2022, sample: 1311 channels)

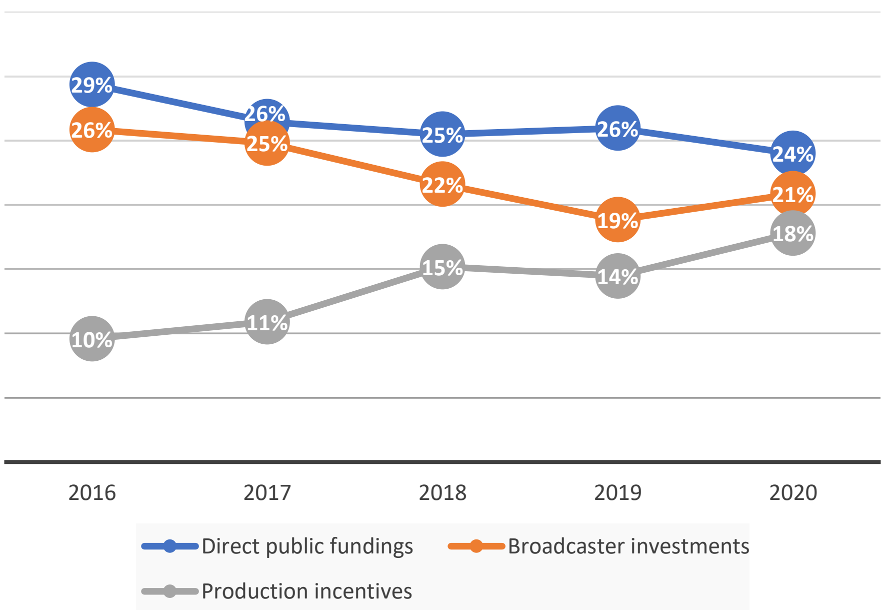


Source: European Audiovisual Observator analysis of MetaProfile data

WHAT IS THE RIGHT MIX FOR PUBLIC SUPPORT?

The share of production incentives in film financing has spectacularly increased (at least before COVID-19)

Share of selected financing sources in the financing of European fiction films (sample: 2490 films)



Source: European Audiovisual Observatory