

YEARBOOK 2022/2023

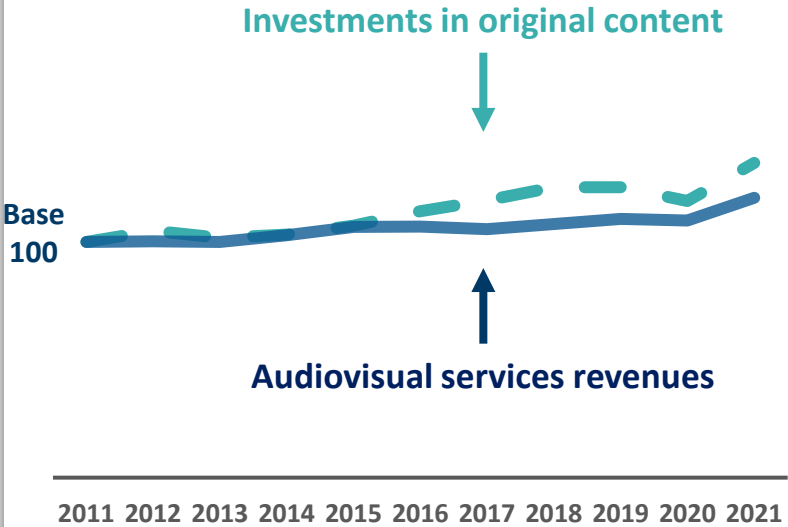
KEY TRENDS

TELEVISION, CINEMA, VIDEO AND ON-DEMAND
AUDIOVISUAL SERVICES - THE PAN-EUROPEAN PICTURE



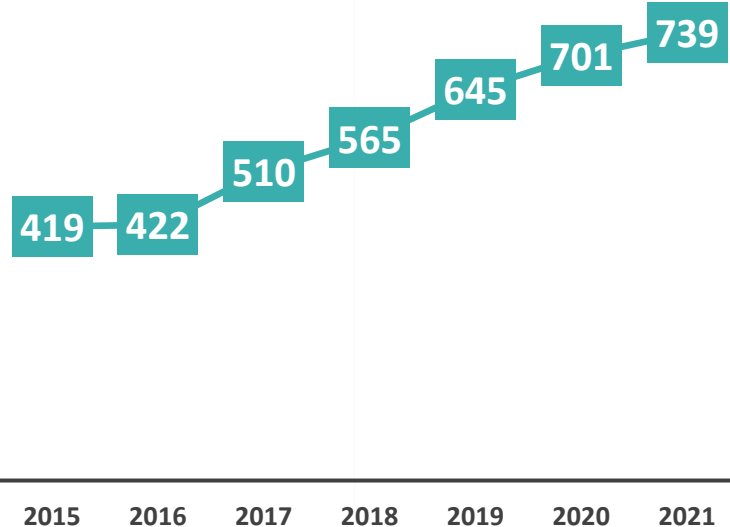
PEAK TV ?

Competition fueled investments in original content



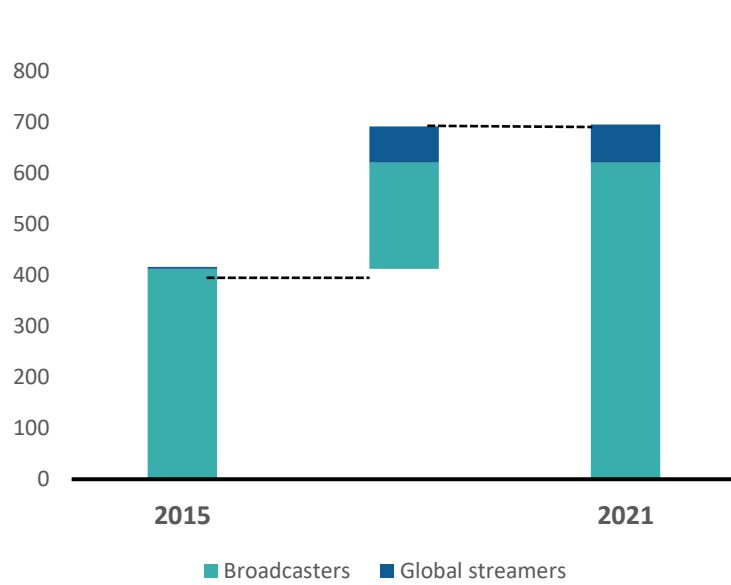
Evolution of original production spendings vs. AV sector revenues (Europe)
 EAO analysis of AmpereAnalysis, EBU/MIS, WARC data

... in particular in TV series production



Number of less-than-13-episode tv fiction seasons
 EAO analysis of The European Metadata Group data

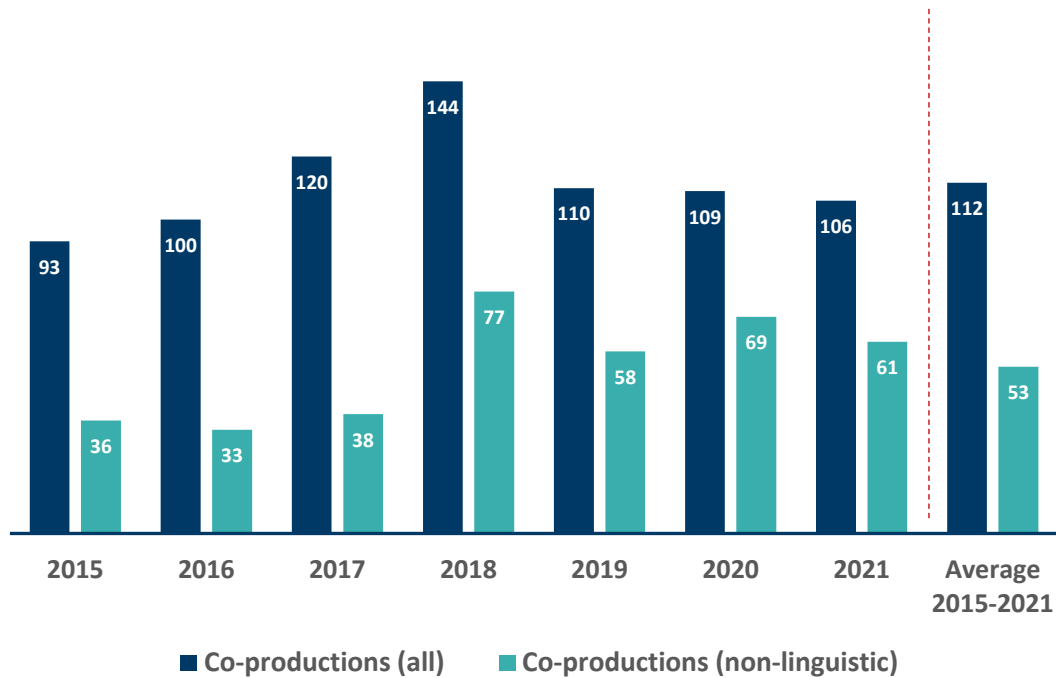
... in particular by broadcasters



Less-than-13-episode tv fiction seasons by commissioner
 EAO analysis of The European Metadata Group data

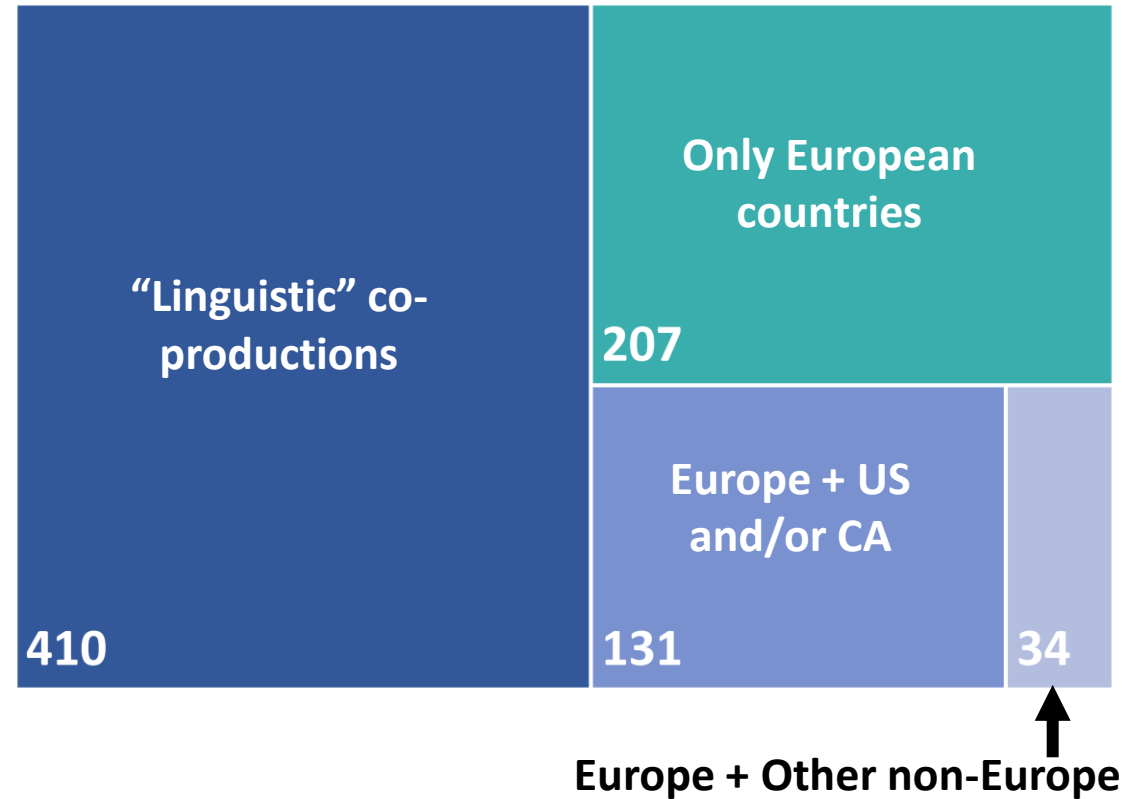
INTERNATIONAL COOPERATION

About 110 TV series co-productions a year



Number of TV fiction European coproductions
EAO analysis of The European Metadata Group data

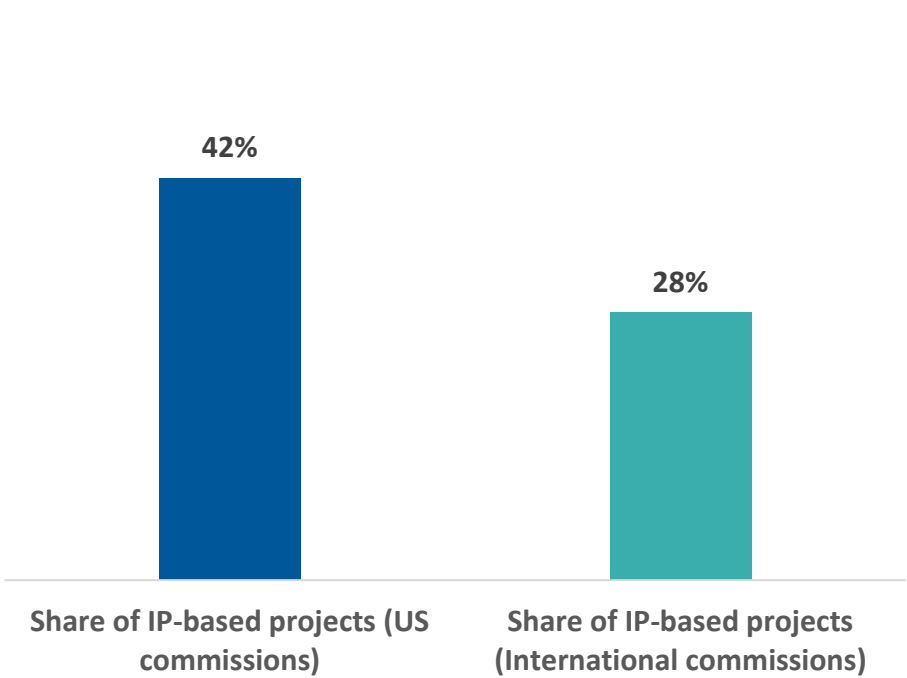
Half co-productions are “linguistic”



Breakdown of 2015-2021 European fiction coproductions
EAO analysis of The European Metadata Group data

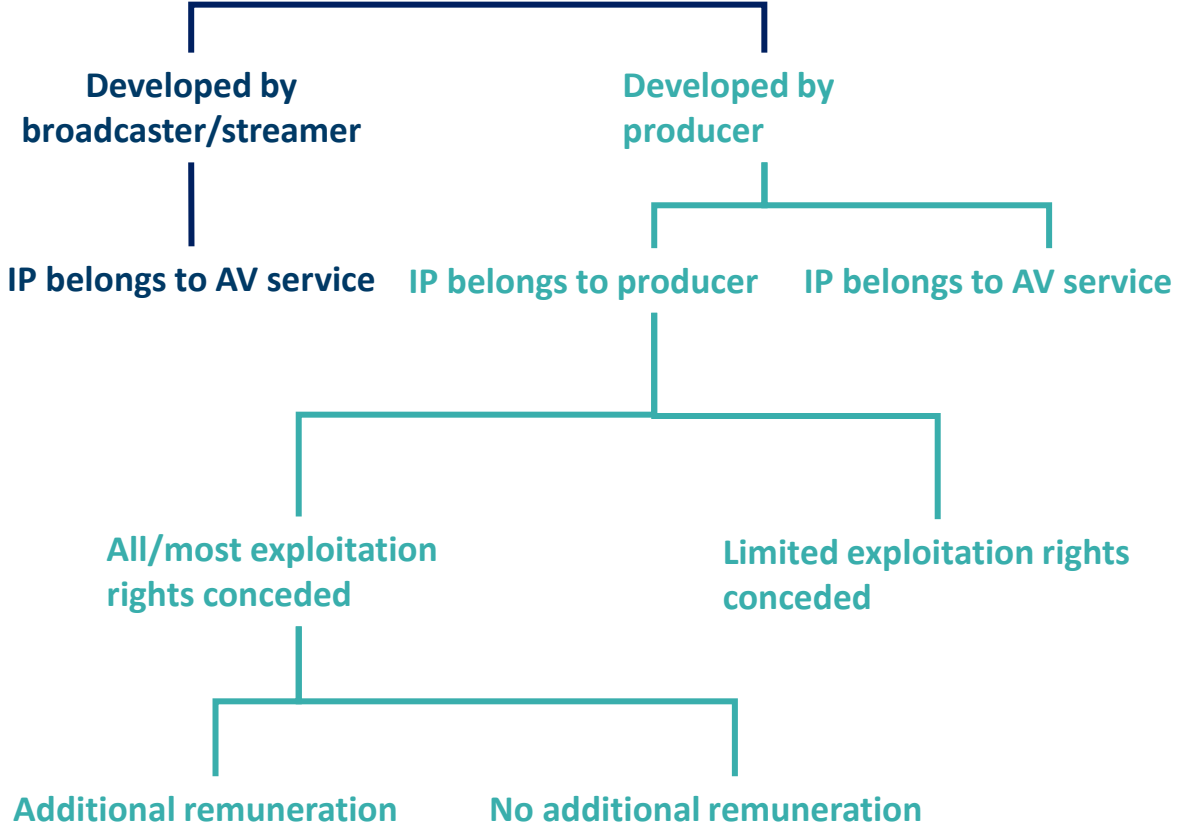
THE POWER OF IP

Less IP-based projects in Europe than in the US



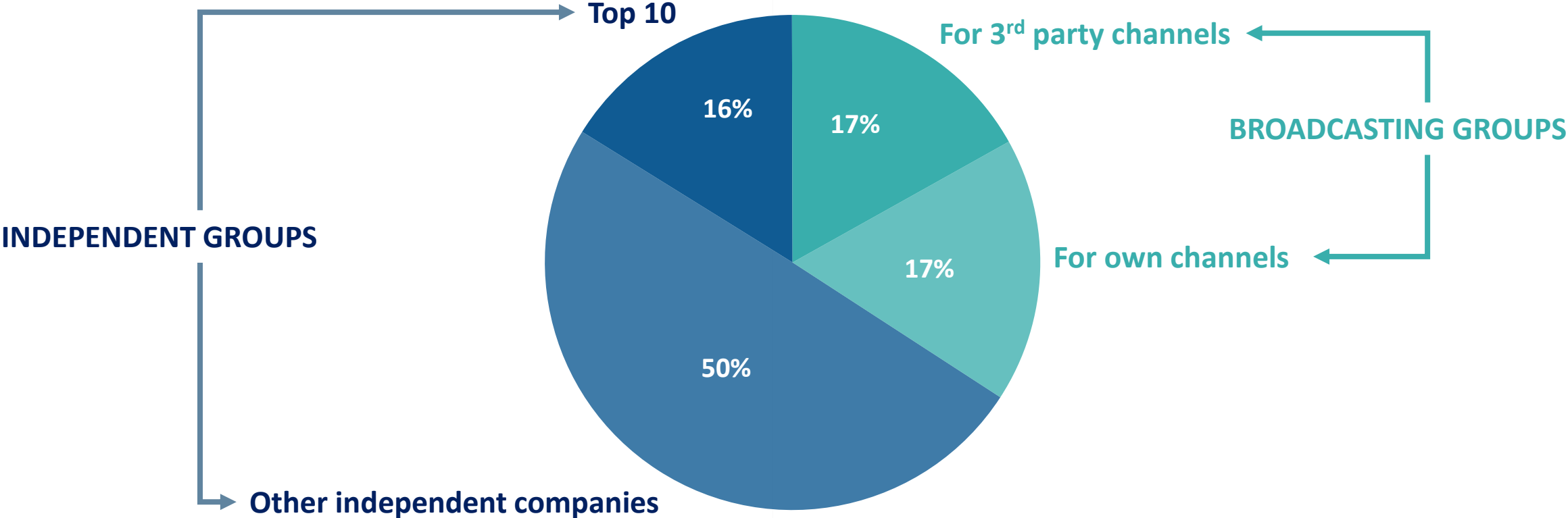
Share of originals (scripted and unscripted) based on pre-existing IP – H2 2021/H12022
AmpereAnalysis

What does “sharing the IP” exactly mean?



WHY IS CRITICAL SIZE NEEDED?

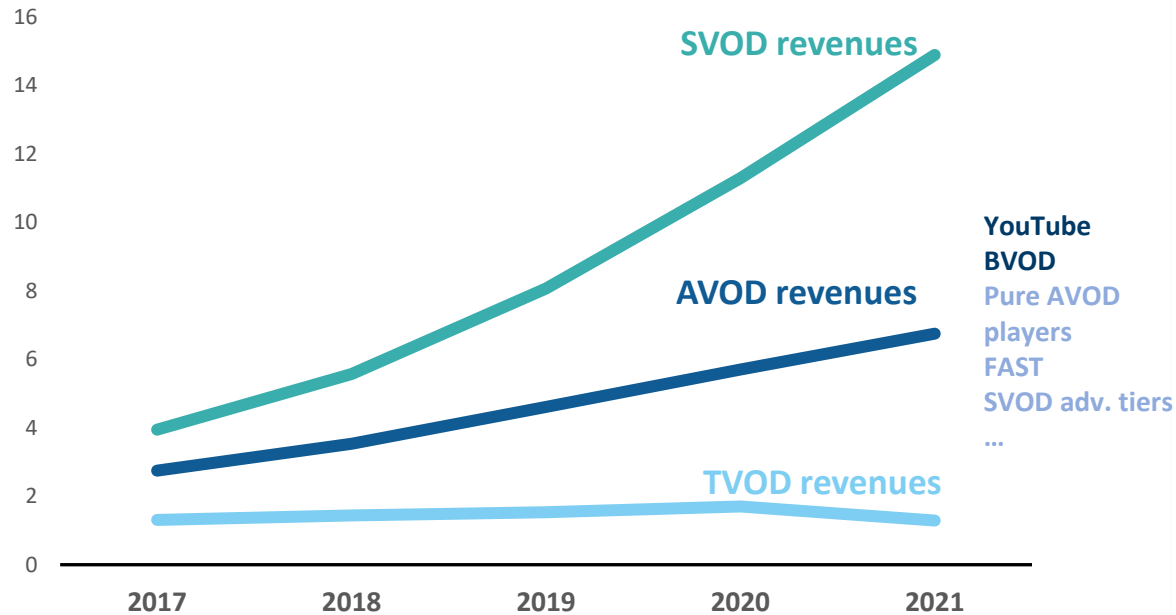
Independent companies or independent productions?



Less-than-13-episode tv fiction seasons by category of producer (2021, hours)
EAO analysis of The European Metadata Group data

AVOD: CATALOGUES OR ORIGINAL PRODUCTION?

AVOD: a crowded space



VOD revenues by segment (Europe, bnEUR)
EAO analysis of AmpereAnalysis, Dataxis data

Will producers/rightholders go B2C?

Program channels
Thematic channels

Revenue sharing
Inventory sharing

Linear+on-demand

AVOD
“PLATFORM”
AS...

