

# DISCLAIMER

This presentation is based on the European Audiovisual Observatory report,  
“[Audiovisual fiction production in Europe - 2022 figures](#)”.

Please refer to this report for definitions and methodology.

# YEARBOOK 2023/2024

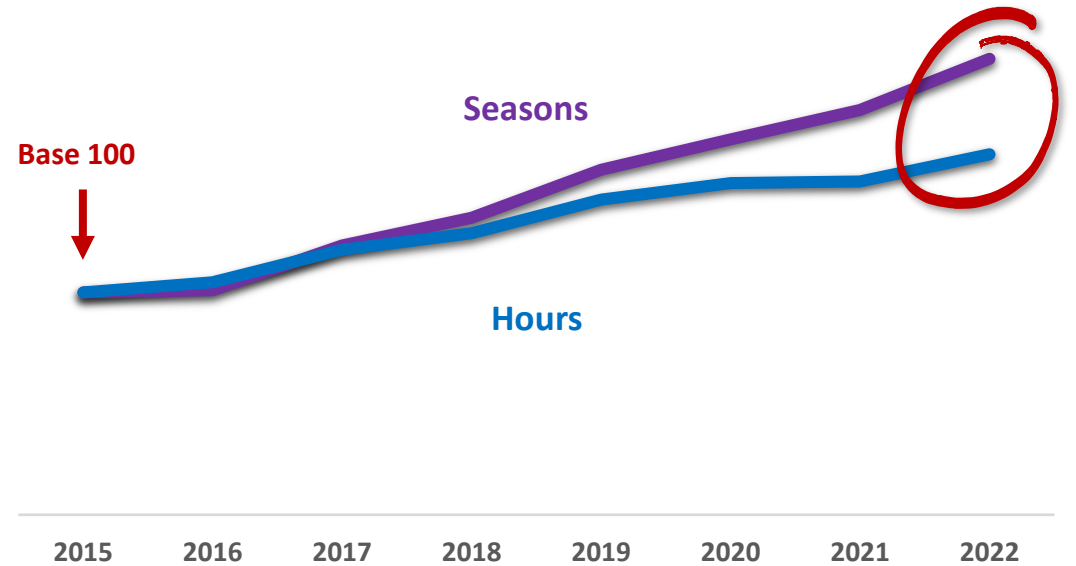
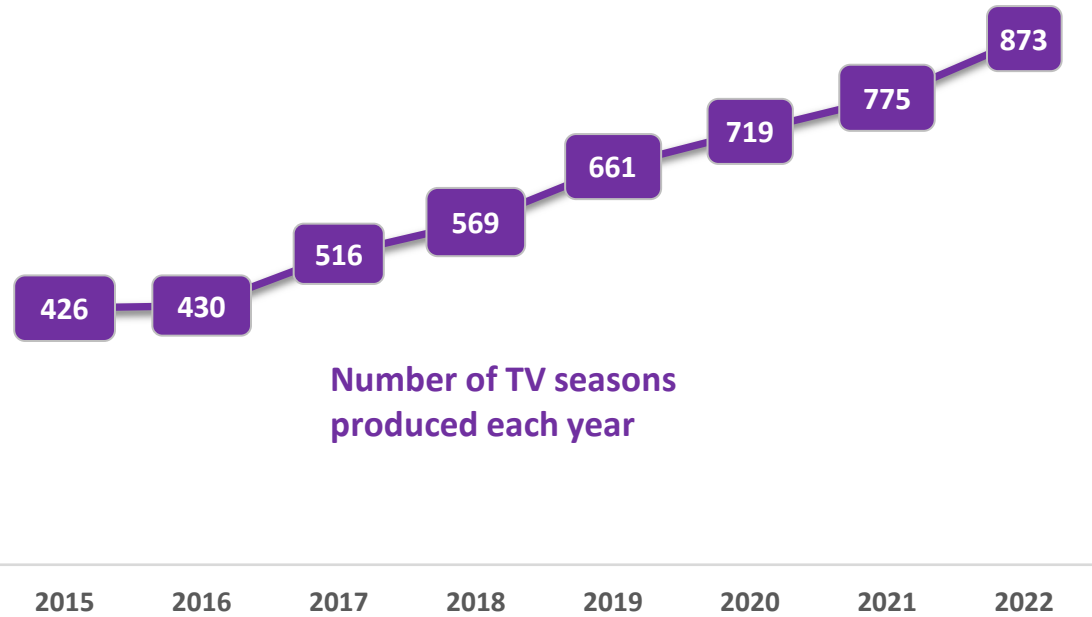
## KEY TRENDS

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



# WARNING SIGNS?

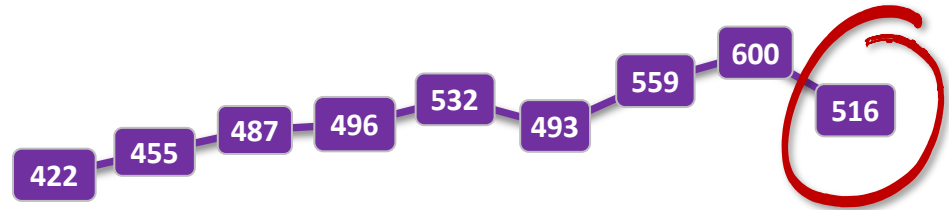
Impressive growth in number of titles, less in hours



Less-than-13-episode TV/SVOD fiction seasons  
EAO analysis of Media Press data

# WARNING SIGNS?

Is there a trend reversal in the US and will Europe follow?



Number of TV seasons produced in the US

2015 2016 2017 2018 2019 2020 2021 2022 2023

FX content research

*Impact of the strikes or downturn?*



Number of European films commissioned by streamers

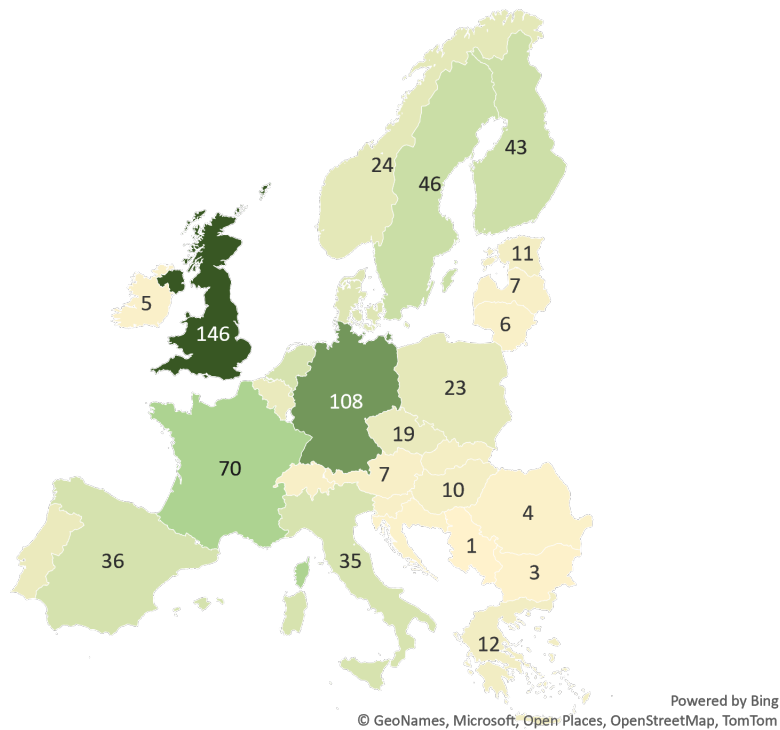
2016 2017 2018 2019 2020 2021 2022 2023

European Audiovisual Observatory

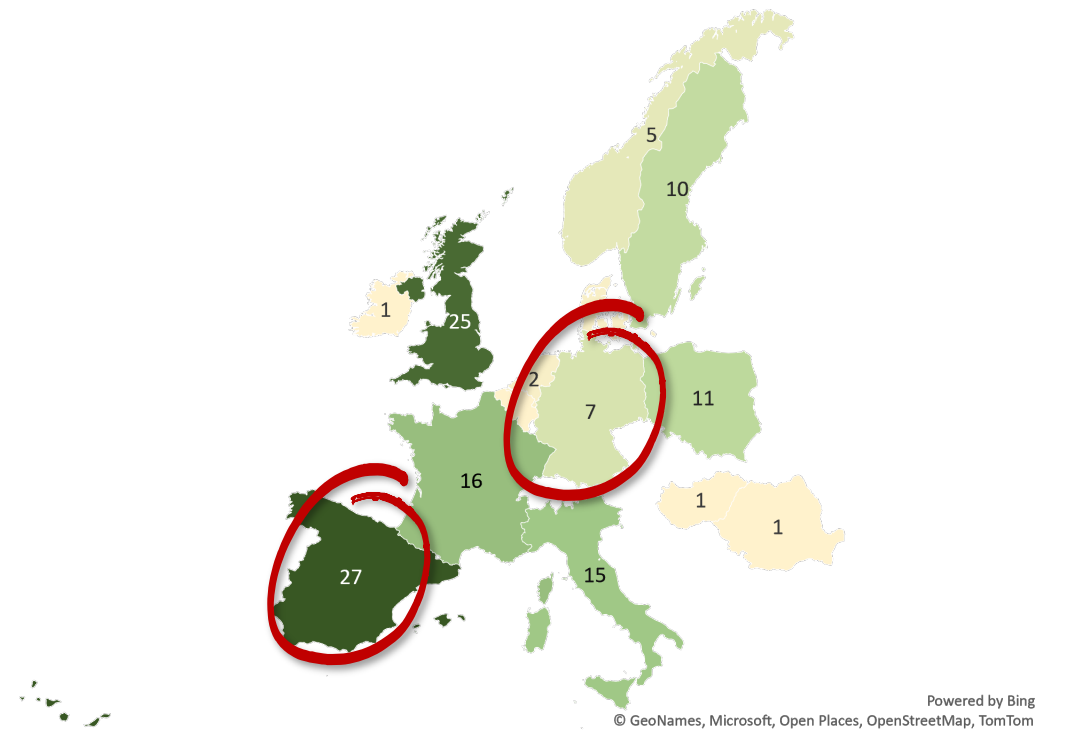
*Catch-up of COVID years? Less films but with higher budgets?*

# A COUNTRY VIEW: WINNERS AND LOSERS?

National broadcasters support national production while global streamers' commissions seem far more concentrated



Less-than-13-episode TV fiction seasons (2022)  
EAO analysis of Media Press data



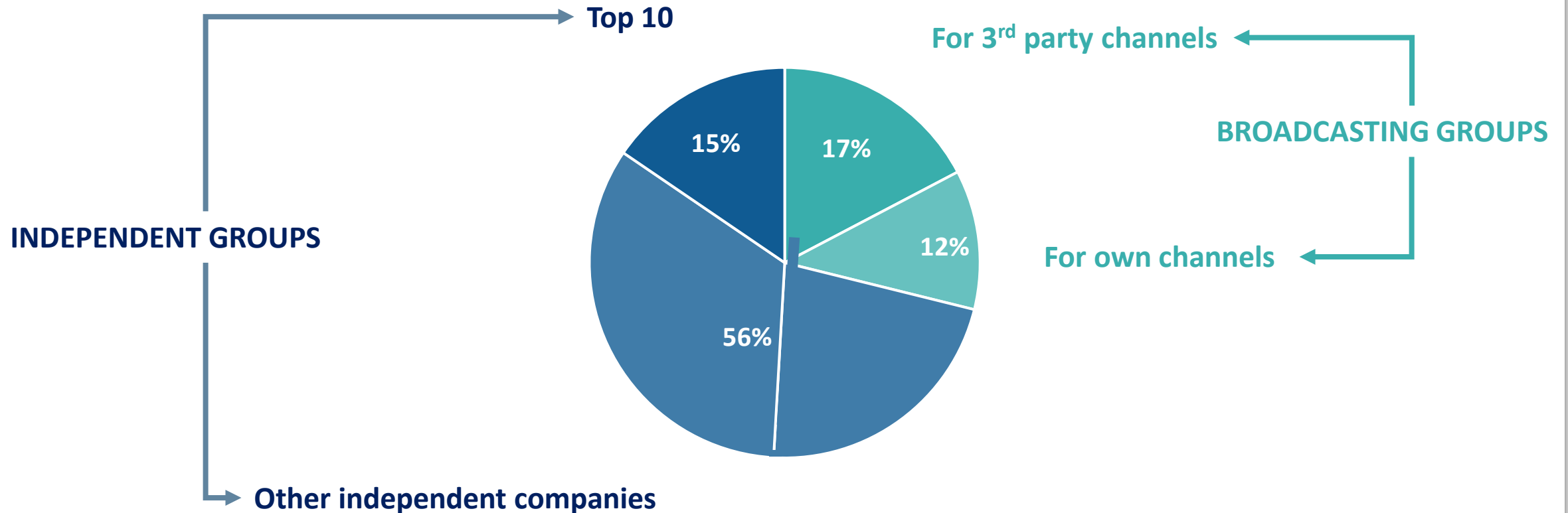
Less-than-13-episode SVOD fiction seasons (2022)  
EAO analysis of Media Press data

# HOW STRONG IS THE INDUSTRY?

“Smaller” independent production companies account for the majority of the TV/SVOD series production market



Please refer to the EAO report “[Audiovisual fiction production in Europe - 2022 figures](#)” for the definition of independent production

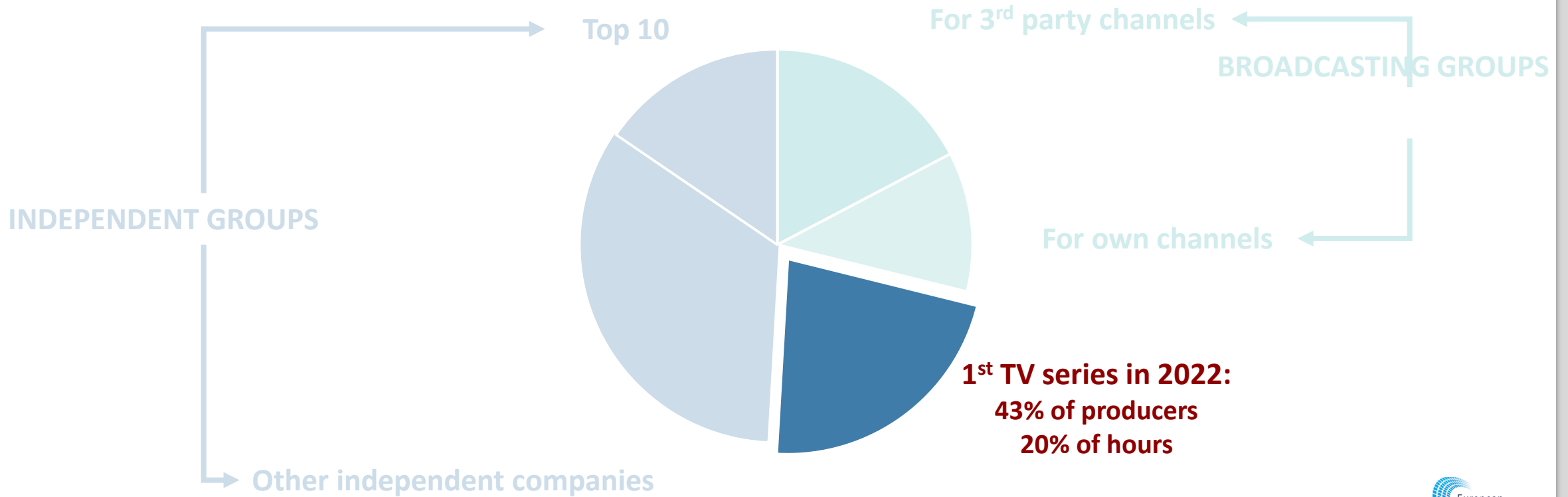


# HOW STRONG IS THE INDUSTRY?

Huge turnover in TV series titles turns into a large turnover of producers



Please refer to the EAO report "[Audiovisual fiction production in Europe - 2022 figures](#)" for the definition of independent production

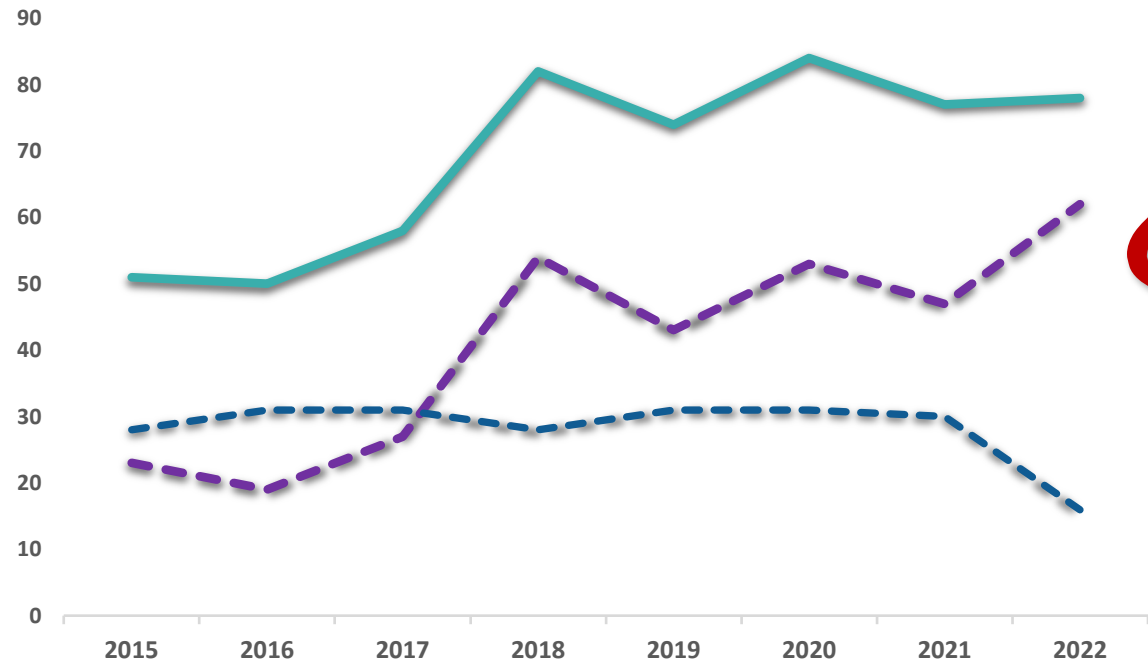


Less-than-13-episode tv fiction seasons by category of producer (2022, hours)

EAO analysis of Media Press data

# ENOUGH COPRODUCTIONS?

The number of series coproductions is stagnating, but they are more truly international



All coproductions

Of which "non-linguistic"

Of which "linguistic"

(France-Belgium, Germany-Austria etc.)

Less-than-13-episode European TV/SVOD fiction seasons coproductions (2015-2022)

EAO analysis of Media Press data



# A SHORTAGE OF TALENTS?

Active series writers between 2015 and 2022: **7 500**



On average involved in **1.7** TV/SVOD series between 2015 and 2022



Representing **2.4** seasons



Representing **11.2** episodes

Activity of less-than-13-episode TV/SVOD fiction writers (2015-2022)

*European Audiovisual Observatory*