

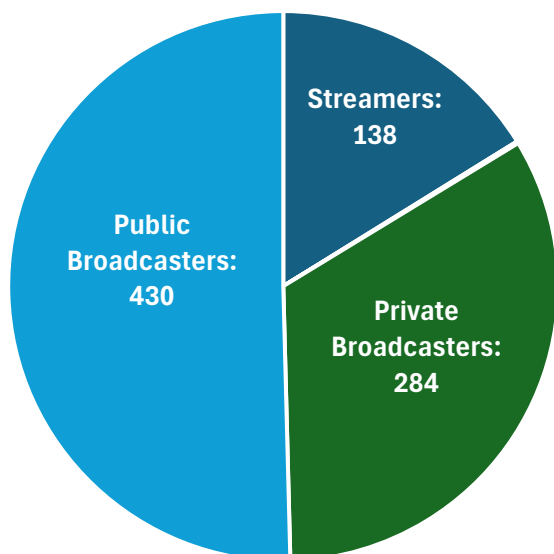
KEY TRENDS 2025

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



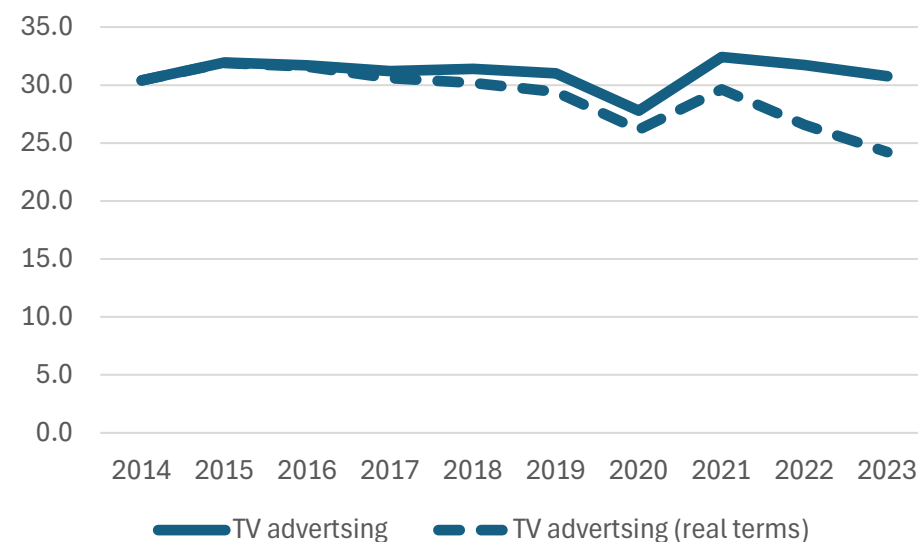
Broadcasters' revenues at stake

853 seasons commissioned in 2023, over 80% by broadcasters



Breakdown of TV/SVOD seasons of less than 13 episodes per season by category of commissioner (units, 2023)

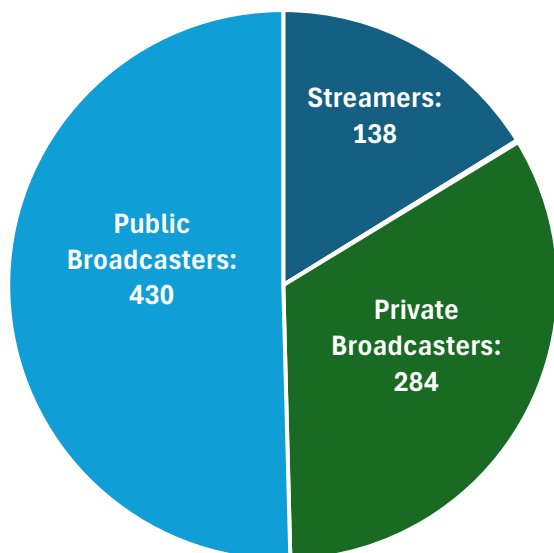
TV advertising is stagnating, and decreasing in real terms



TV advertising in Europe in nominal and real terms (bn EUR)

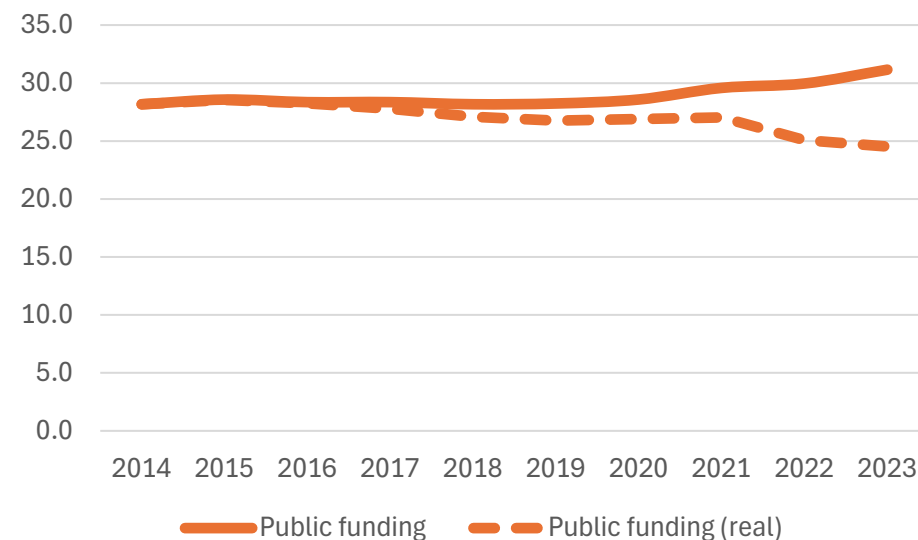
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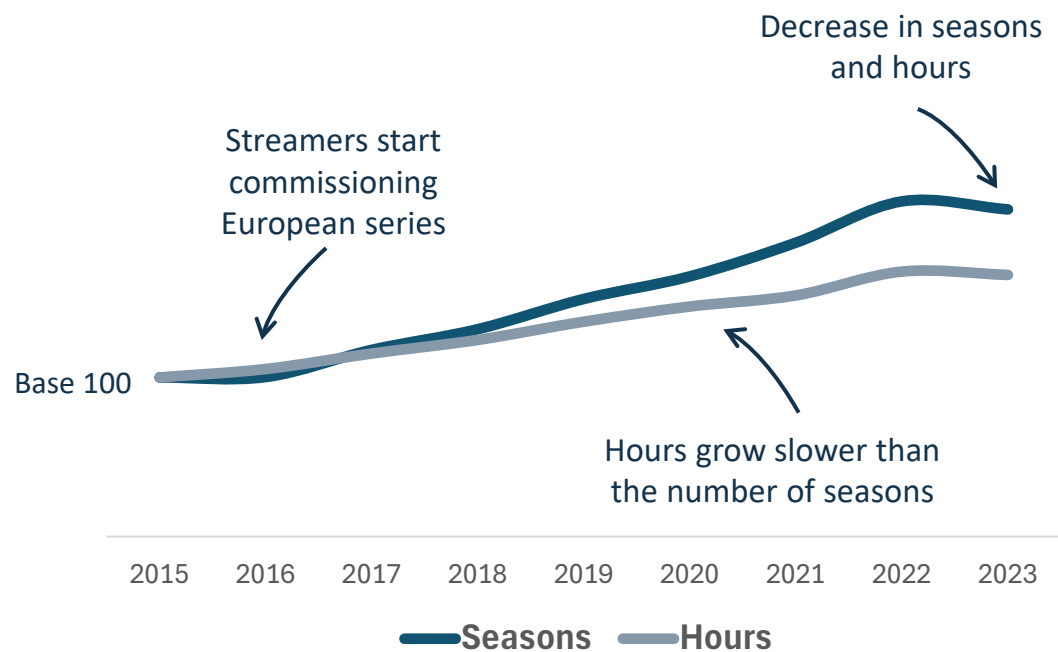
Public funding is slightly growing, but decreasing in real terms



PSBs' public funding in Europe in nominal and real terms (bn EUR)

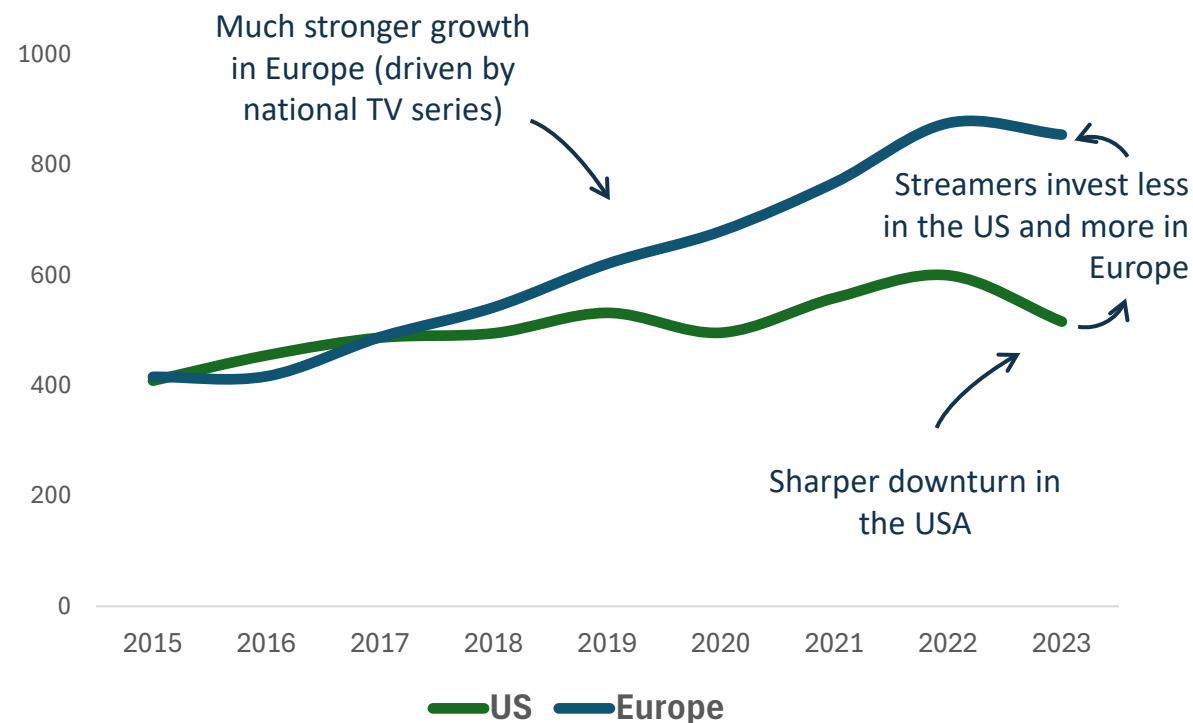
TV/SVOD production: growth crisis or rationalization?

A comparatively modest trend reversal... pending 2024 figures



Number and volume of TV/SVOD seasons of less than 13 episodes per season produced

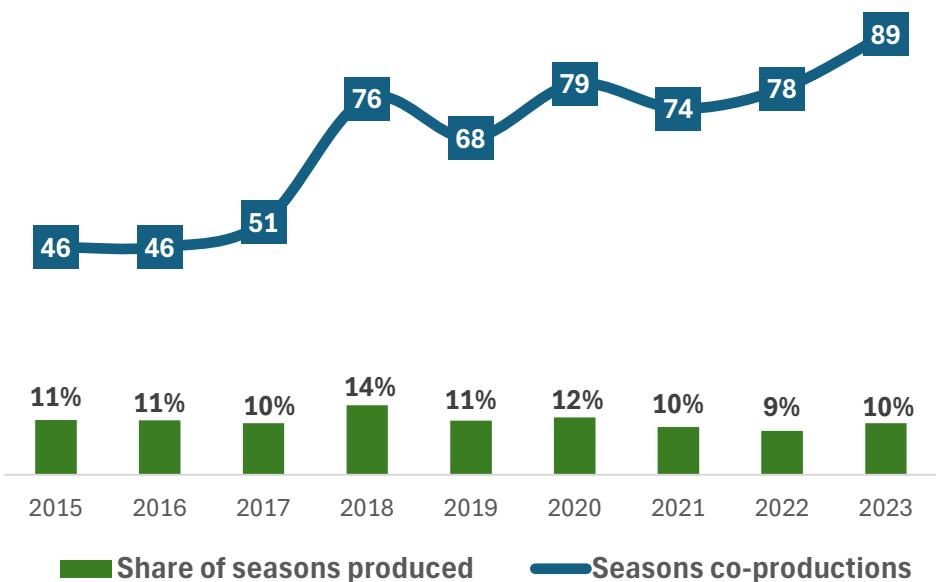
Downturn or rationalization after years of continuous growth?



Number of co-productions of TV/SVOD seasons of less than 13 episodes per season

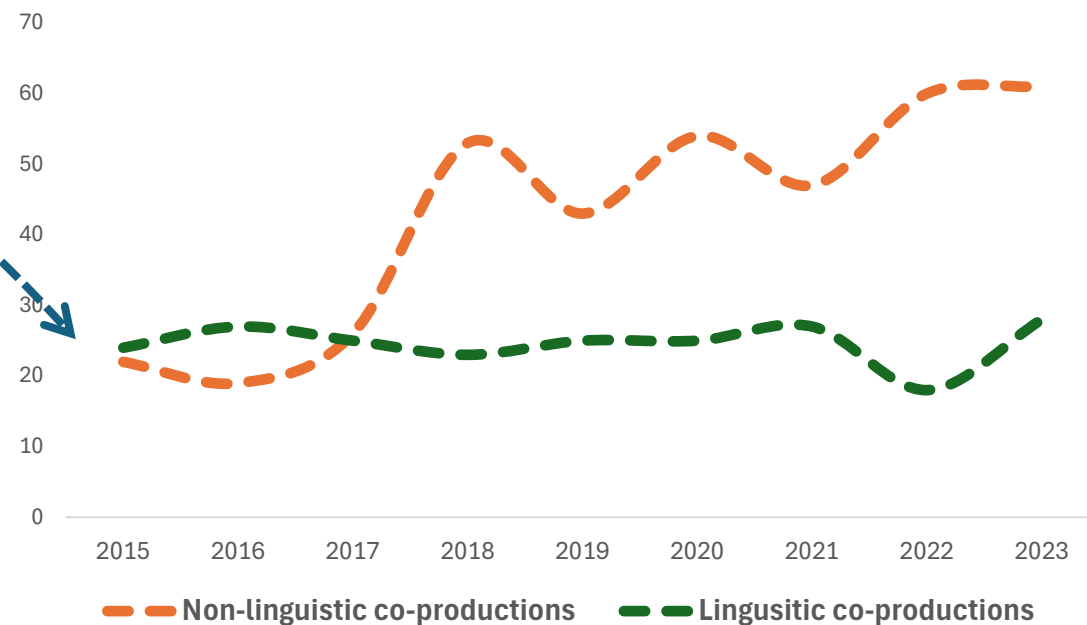
Why, exactly, co-productions?

The share of international co-productions among TV/SVOD series has remained quite stable



Number of co-productions of TV/SVOD seasons of less than 13 episodes per seasons

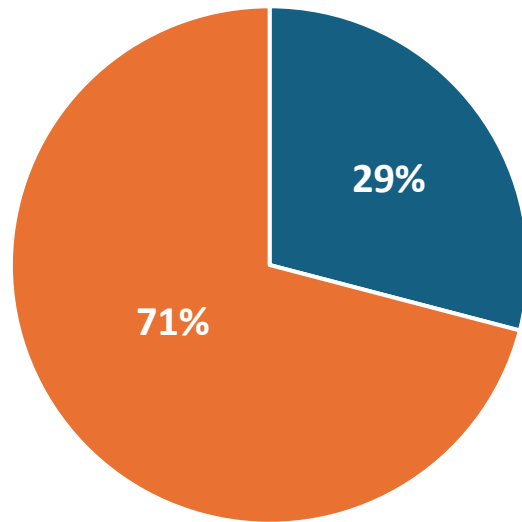
“True” co-productions have grown faster than co-productions between same-language countries



Breakdown of coproductions : linguistic vs. non-linguistic (2015-2023)

Working with producers

Broadcasters integrated production account for about 30% of hours produced

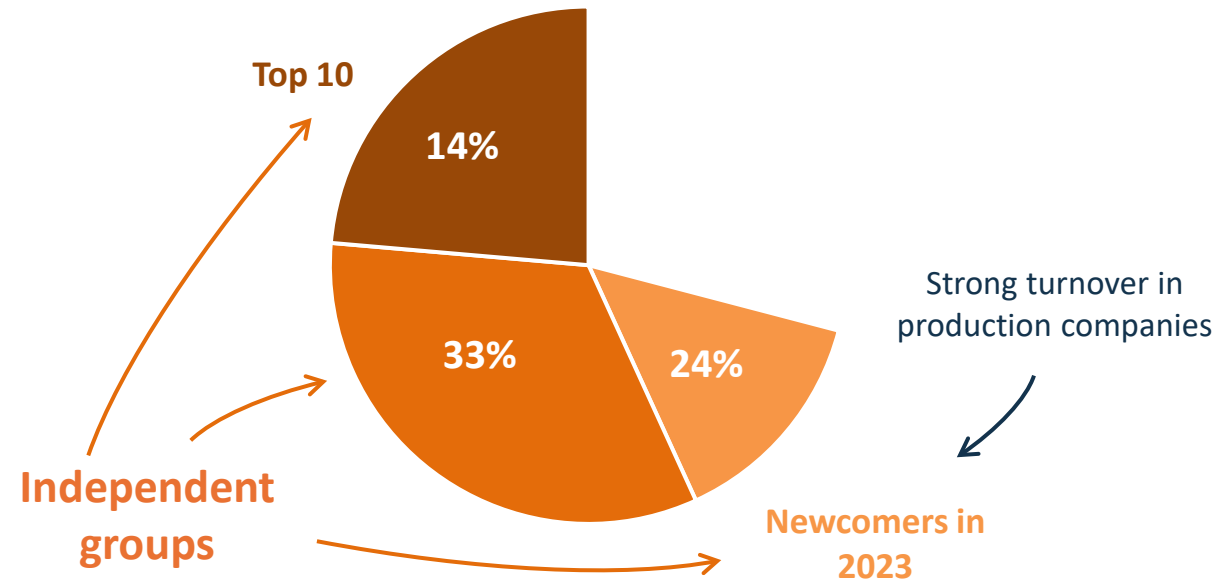


Broadcasting groups

Independent groups

Breakdown of TV/SVOD seasons of less than 13 episodes per season by category of producer (hours, 2023)

The top 10 independent groups account for 14% of hours produced



Breakdown of TV/SVOD seasons of less than 13 episodes per season produced by independent groups (hours, 2023)

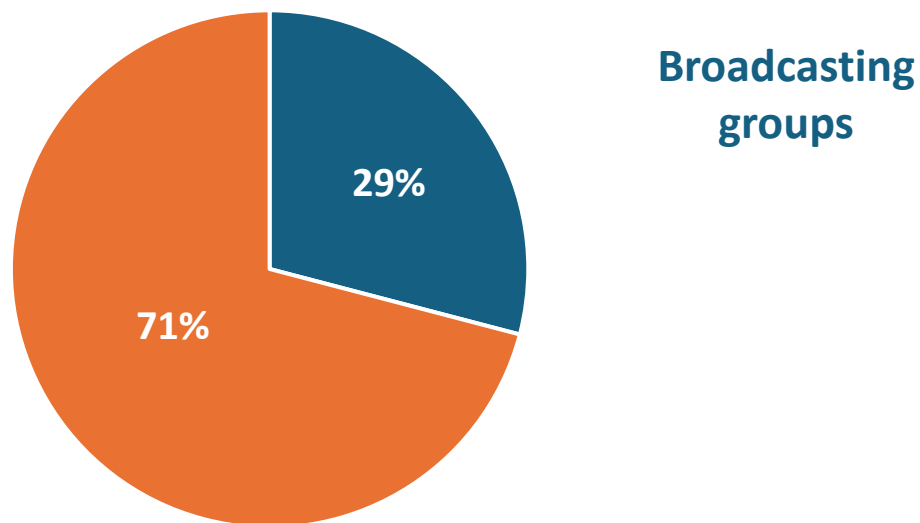
Strong turnover in production companies



“Independent” refers to the ownership of the group, not to the ownership of the work IP

Working with producers

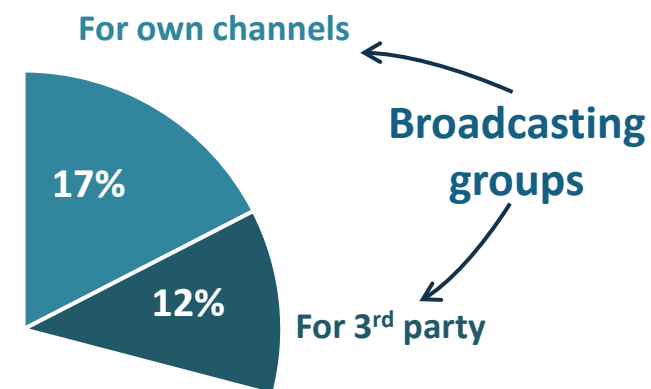
Broadcasters integrated production account for about 30% of hours produced



Independent groups

Breakdown of TV/SVOD seasons of less than 13 episodes per season by category of producer (hours, 2023)

Broadcasters produce mainly for themselves



Breakdown of TV/SVOD seasons of less than 13 episodes per season produced by broadcasters (hours, 2023)



“Independent” refers to the ownership of the group, not to the ownership of the work IP