

KEY TRENDS 2026

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

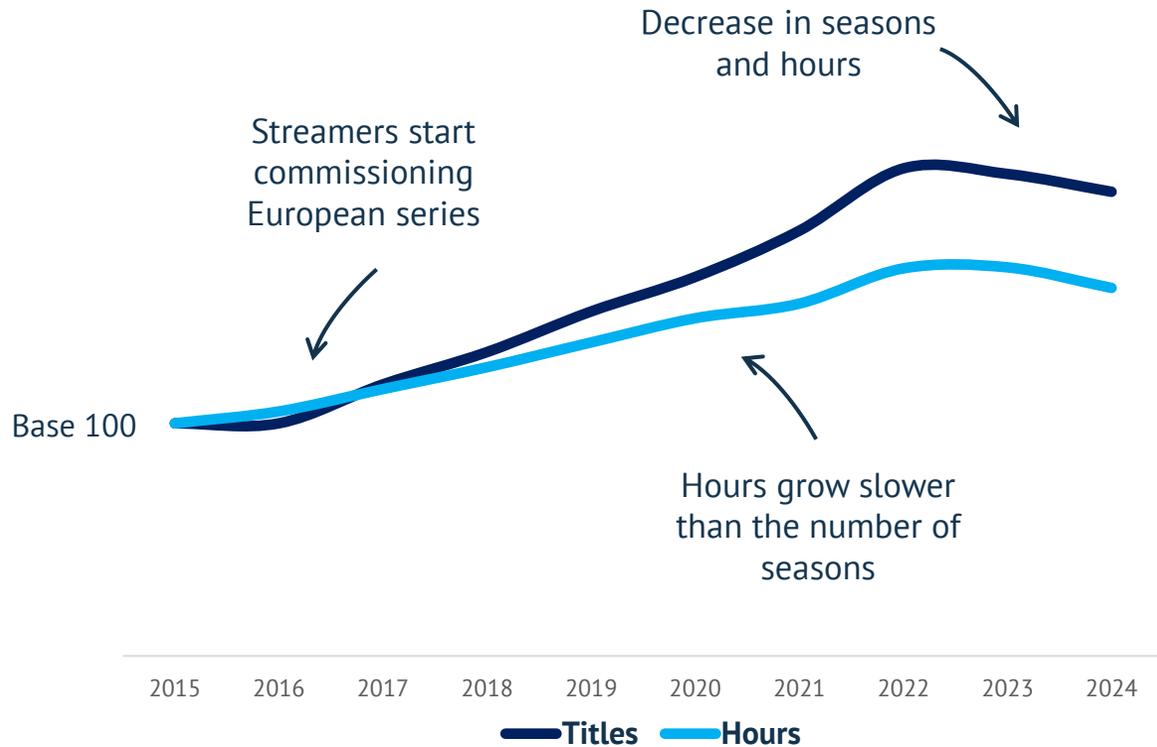


TELEVISION, CINEMA,
VIDEO AND ON-DEMAND
AUDIOVISUAL SERVICES
THE PAN-EUROPEAN PICTURE



TV/SVOD production: a new normal?

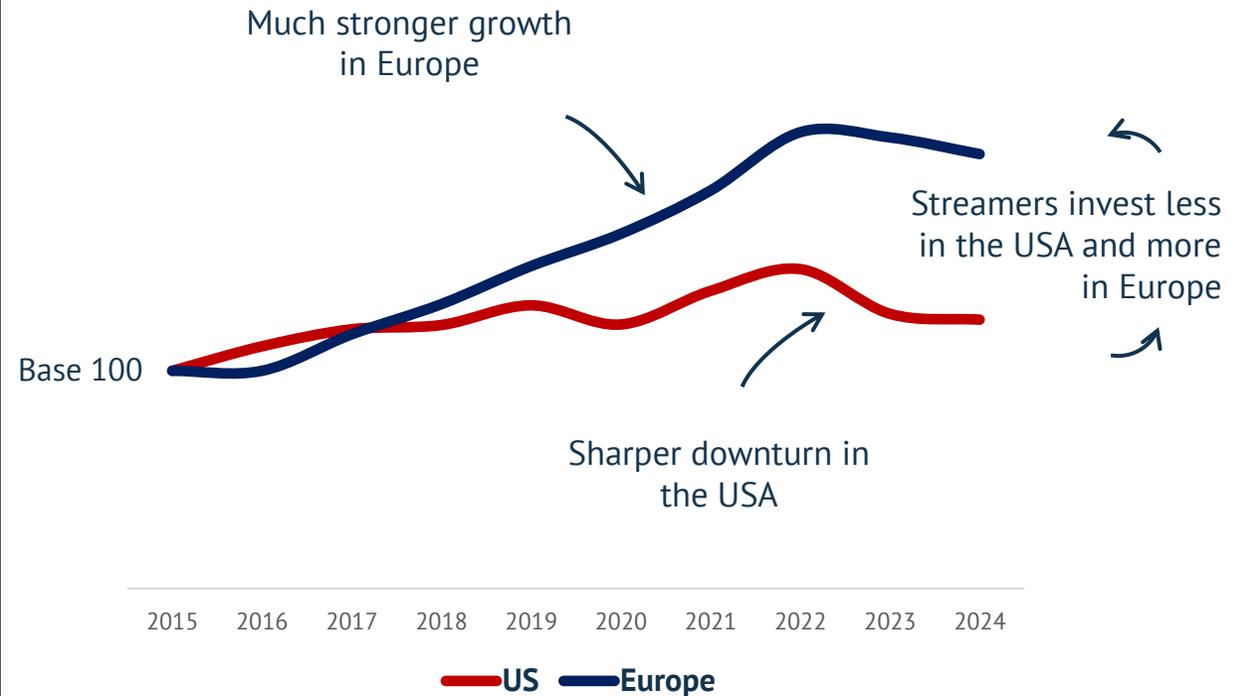
A trend reversal ...



Number and hours of TV/SVOD series with 13 episodes or less per season released

Source: European Audiovisual Observatory

Downturn or the new normal?

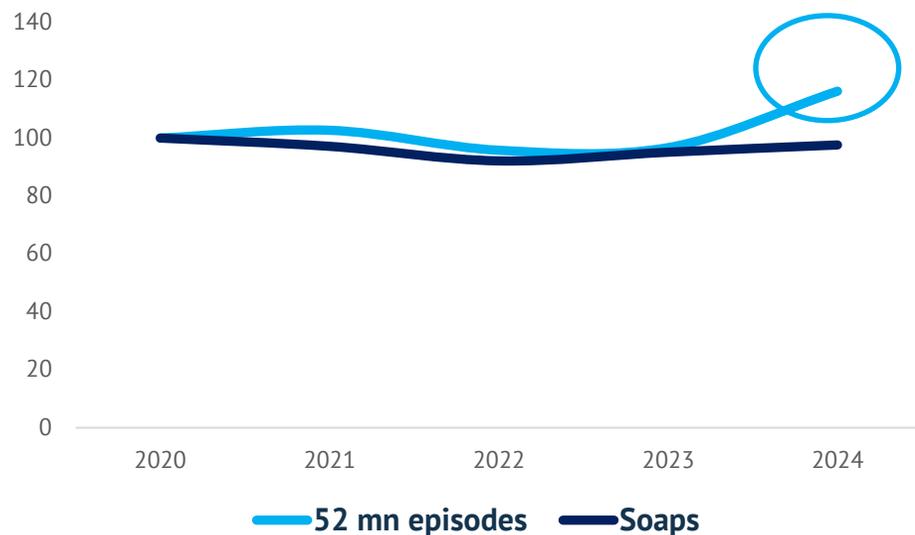


Number of TV/SVOD series with 13 episodes or less per season released

Source: European Audiovisual Observatory / FX Research

Budgets and production incentives

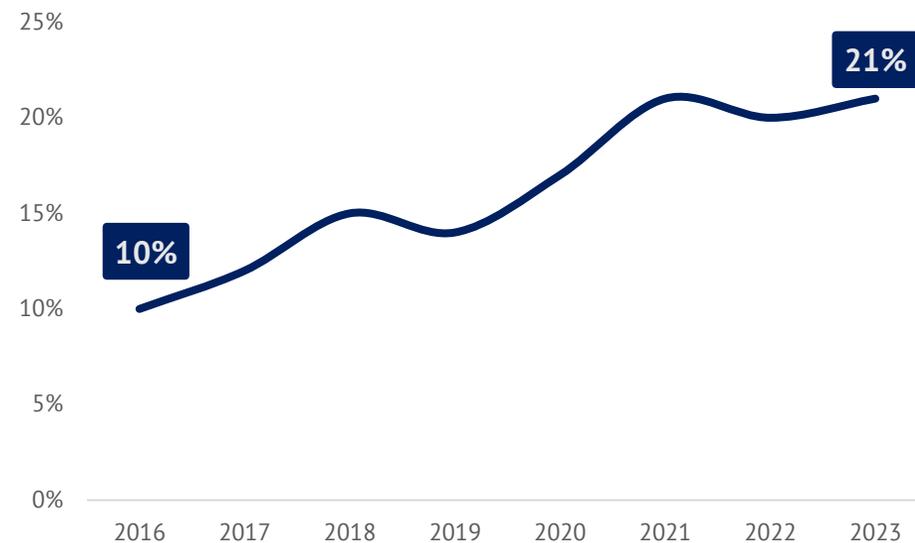
An increase in budgets?



Average budget per hour (kEUR) of supported audiovisual works (France) –
Discounted from inflation – Base 100 = 2020

Source: CNC

Production incentives gaining momentum

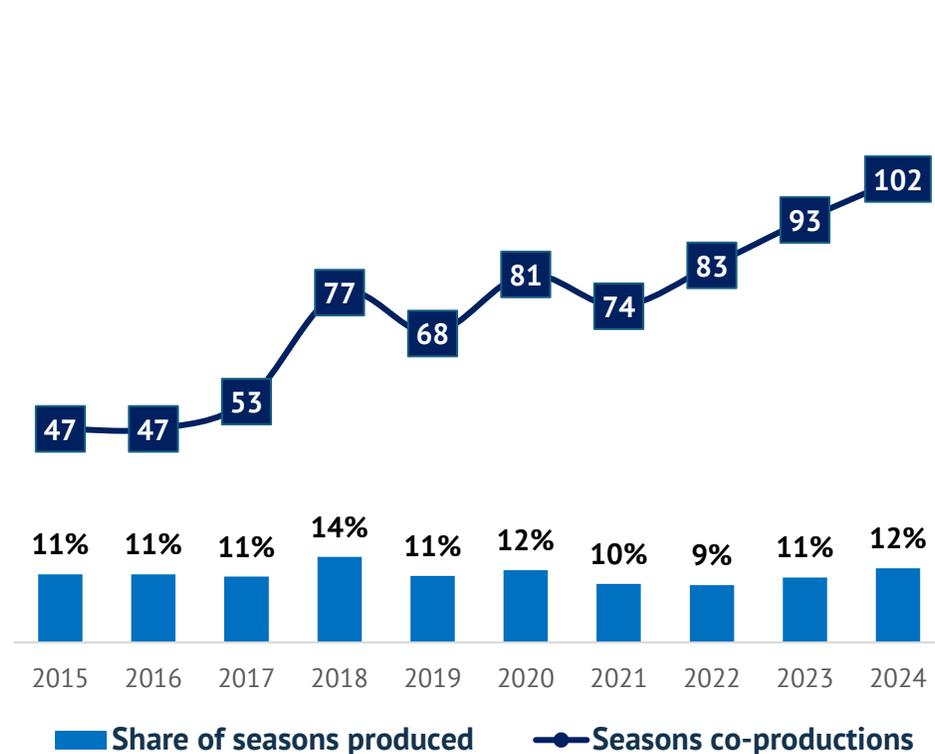


Share of production incentives in total financing of a sample of European
theatrical fiction films (2016-2023)

Source: European Audiovisual Observatory

A limited number of co-productions

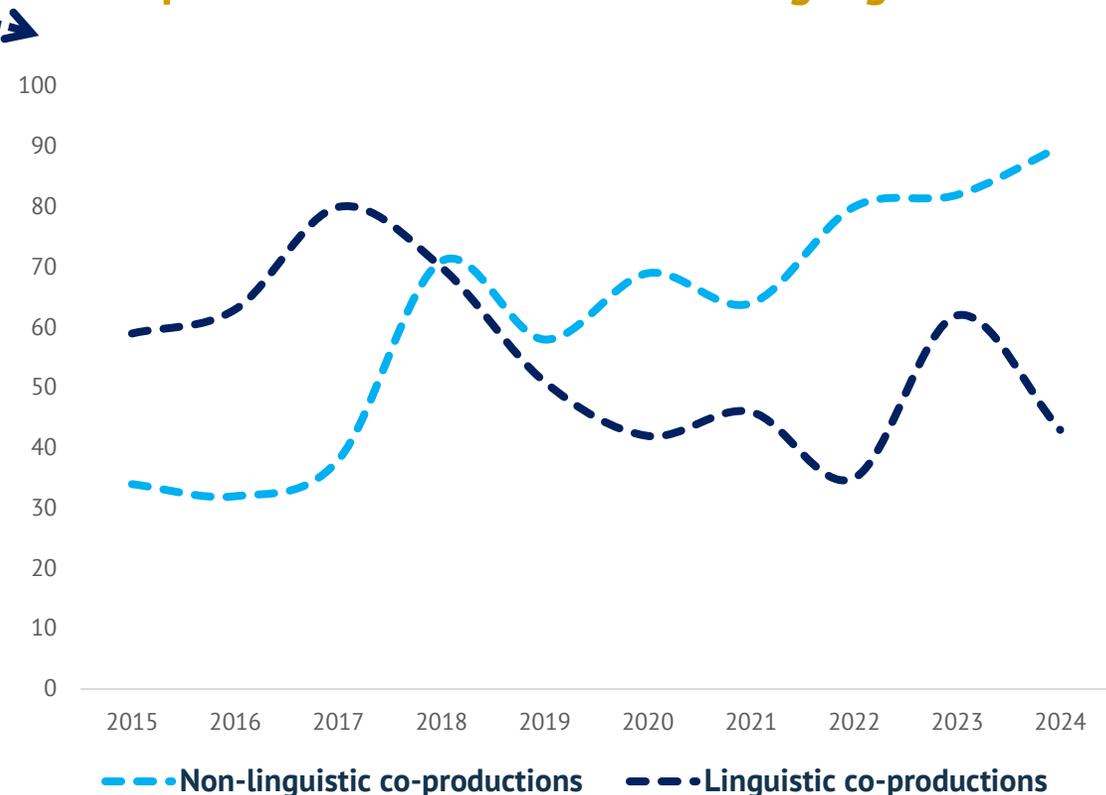
The share of international co-productions among TV/SVOD series has remained fairly stable



Number of co-productions of TV/SVOD series with 13 episodes or less per season released

Source: European Audiovisual Observatory

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



Breakdown of coproductions: linguistic vs. non-linguistic (2015-2024)

Source: European Audiovisual Observatory

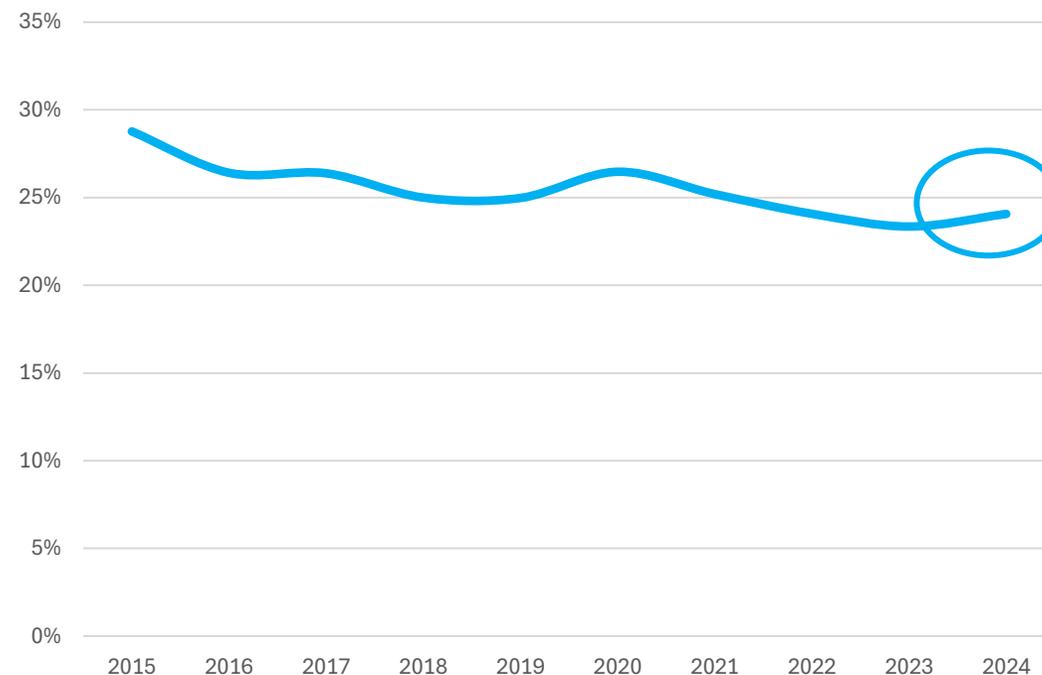
Concentration?

Snapshot 2024:

**755 companies active in TV/SVOD
fiction production**
320 (40%) were newcomers

Source: European Audiovisual Observatory

Concentration decreased... until the downturn



Share of top 10 groups in the production of TV/SVOD fiction series (titles)

Producing for YouTube?

2020

Top 10 groups
by AV revenues (2020, in bn EUR)

 COMCAST	15.4
 The WALT DISNEY Company	6.5
 ARD 1	6.5
 NETFLIX	6.5
 R T L	6.0
 BBC	5.7
 CANAL+	5.5
 YouTube	4.4
 ProSiebenSat.1 Media SE	4.0
 itv	3.1

Estimates

2024

Top 10 groups
by AV revenues (2024, in bn EUR)

 COMCAST	14.9
 NETFLIX	10.9
 YouTube	9.7
 The WALT DISNEY Company	9.5
 ARD 1	7.2
 BBC	7.0
 CANAL+	6.4
 R T L	6.3
 WARNER BROS. DISCOVERY	6.0
 Meta	5.4

Estimates

