Commercial broadcasting and streaming in numbers

November 2024

European Audiovisual Observatory
COUNCIL OF EUROPE
CONSEIL DE L'EUROPE

8 300 commercial TV channels

THE SCENE

3 100 commercial on-demand services

THE MARKET

76 bn EUR in 2023

Excluding ≈13 bn of diversification revenues

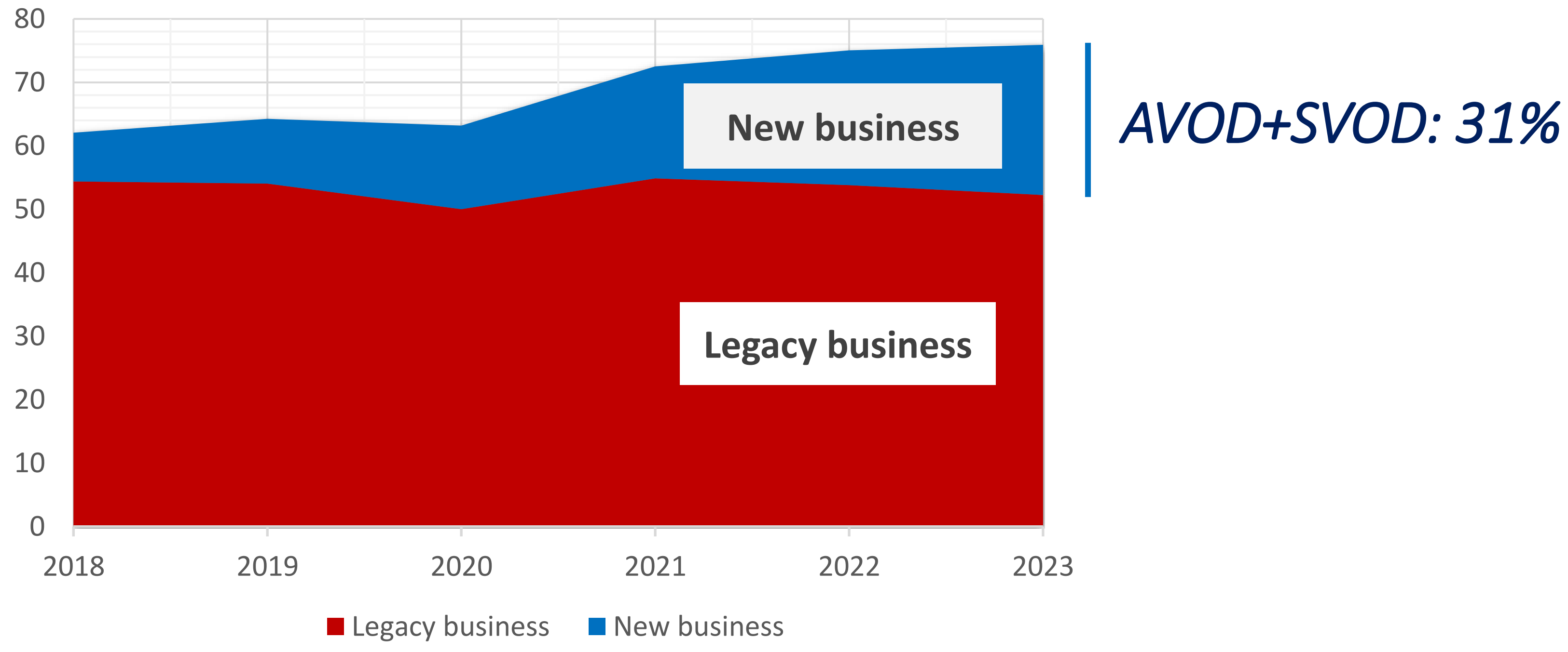
Pay services
43 bn EUR

Advertising
33 bn EUR

ADVERTISING: TV ADVERTSING + AVOD, PAY-TV: DTC PAY-TV, AFFILIATES REVENUES & SVOD . NEW BUSINESS: AVOD & SVOD - DATAXIS, WARC

TRANSFORMATION

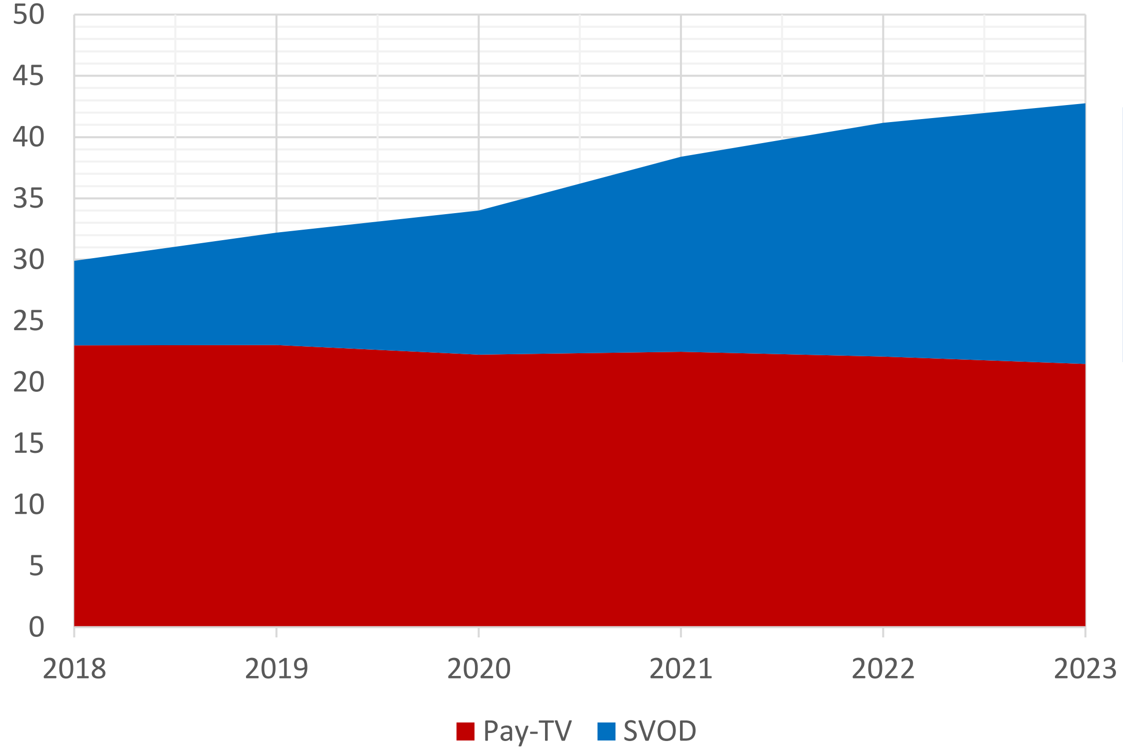
4% average annual growth since 2018



LEGACY: TV ADVERTSING, DTC PAY-TV & AFFILIATES REVENUES . NEW BUSINESS: AVOD & SVOD – DATAXIS, WARC

TRANSFORMATION

Pay services
43 bn EUR

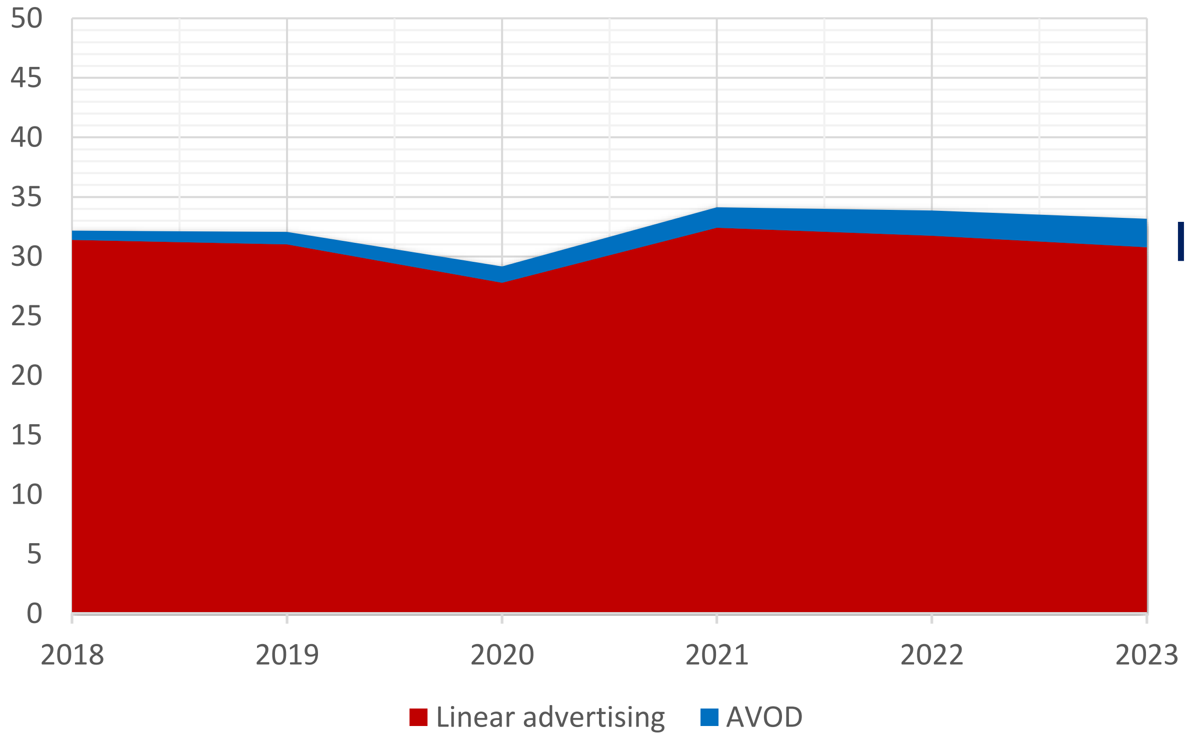


SVOD accounts for 50% of the pay market

PAY SERVICES REVENUES - EUROPE – EXCLUDES DISTRIBUTION FEES – bn EUR - DATAXIS

TRANSFORMATION

Advertising 33 bn EUR



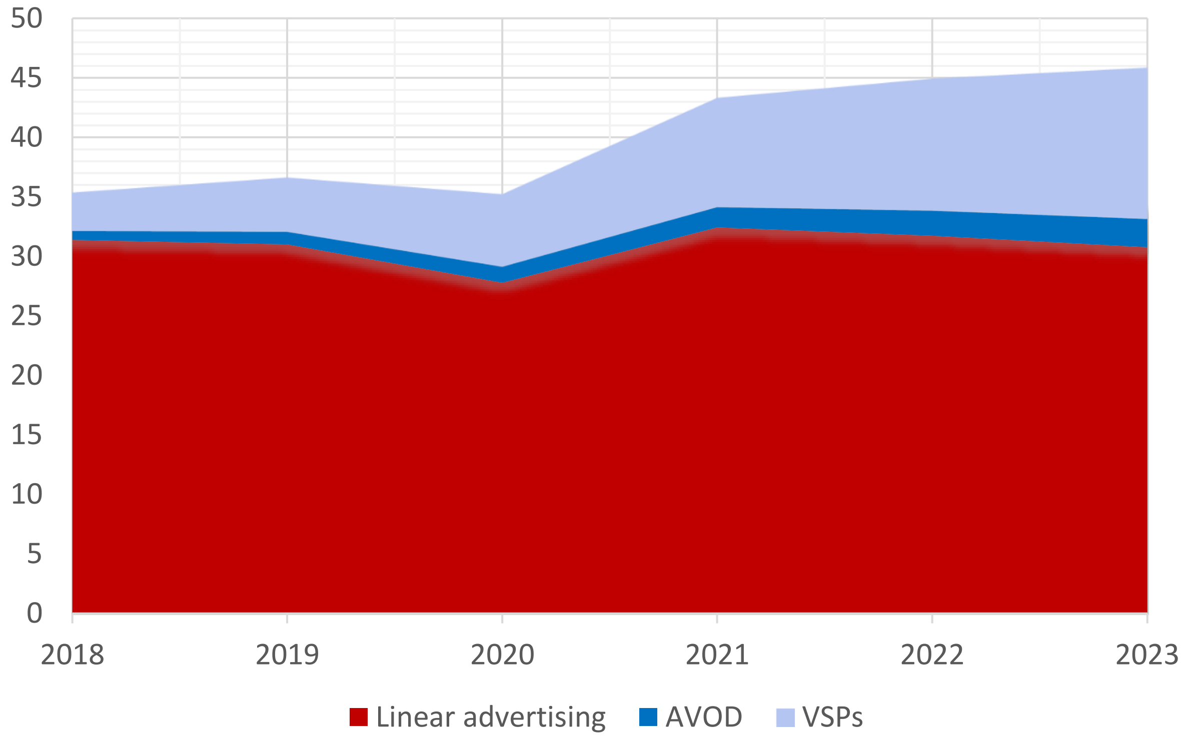
BVOD = 80% of AVOD

AVOD = 8% of advertising

LINEAR AND AVOD ADVERTISING RVENUES – EUROPE – bn EUR - WARC, DATAXIS

TRANSFORMATION

Advertising 33 bn EUR



Are YouTube, TikTok, Instagram part of the same AVOD market?

LINEAR AND AVOD ADVERTISING RVENUES – EUROPE – bn EUR - WARC, DATAXIS

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CONTENT-BASED COMPETITION

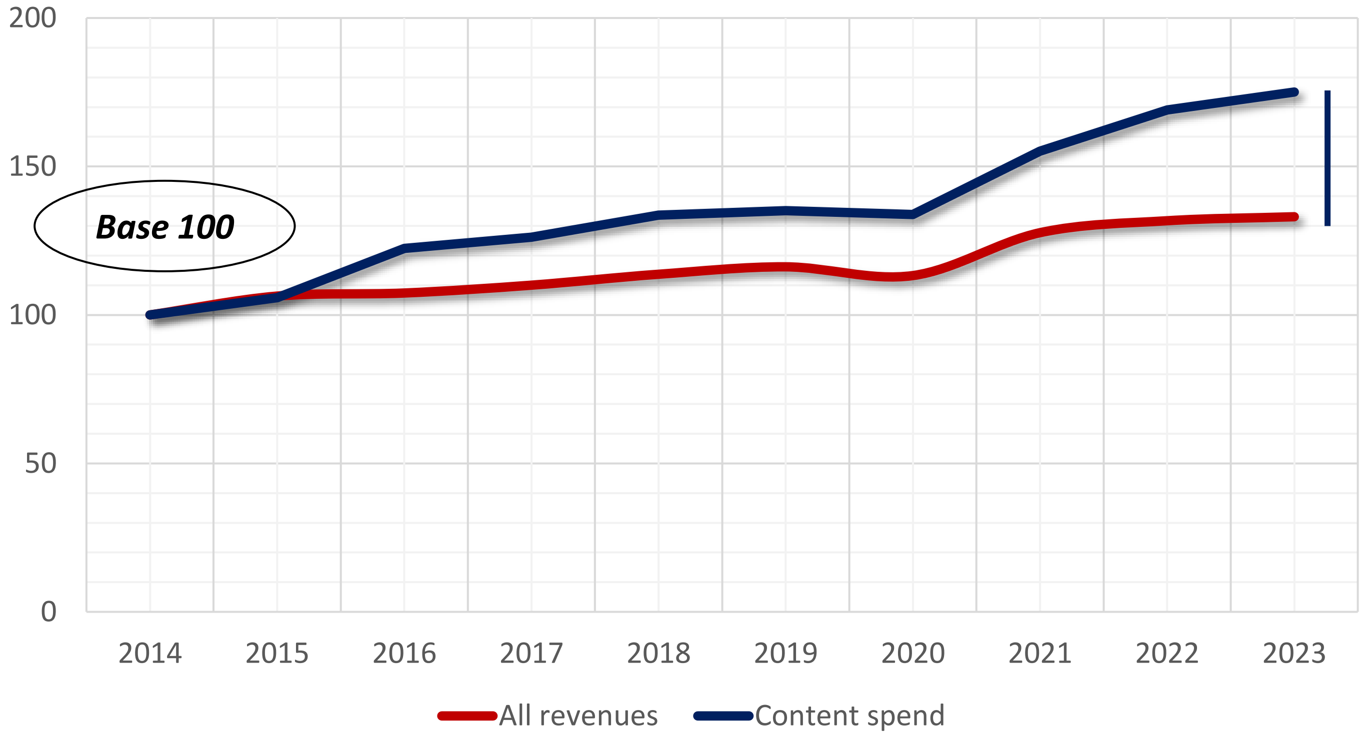
43 bn content spent in 2023

6% average annual growth since 2014

+ news

COMMERCIAL TV AND STREAMERS CONTENT SPEND - EXCLUDE NEWS PRODUCED INTERNALLY – AMPERE ANALYIS

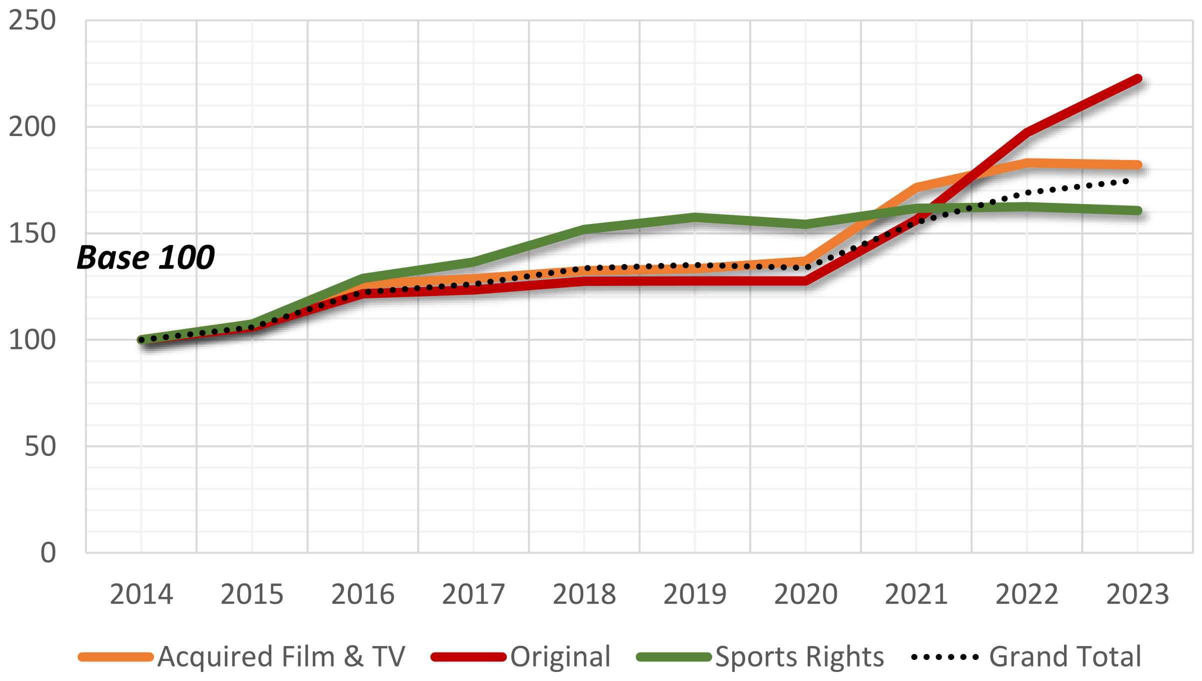
CONTENT-BASED COMPETITION



SVOD drove a strong increase in content spend

COMMERCIAL TV AND STREAMERS REVENUES AND CONTENT SPEND - EUROPE – DATAXIS, AMPERE ANALYSIS

EUROPEAN CONTENT-BASED COMPETITION



Spend in original European content doubled since 2014

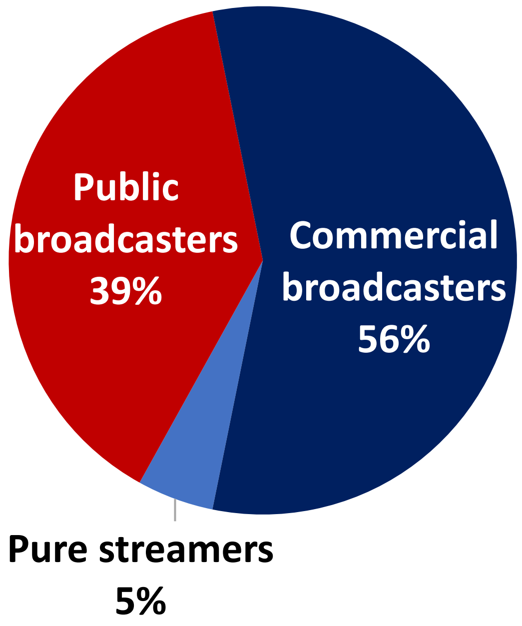
Sport rights inflation came to a halt

COMMERCIAL TV AND STREAMERS CONTENT SPEND - EUROPE - AMPERE ANALYSIS

European Audiovisual Observatory

A FOCUS ON TV/SVOD FICTION COMMISSIONING

Around 15 500 hours in 2023
Down 3% from 2022

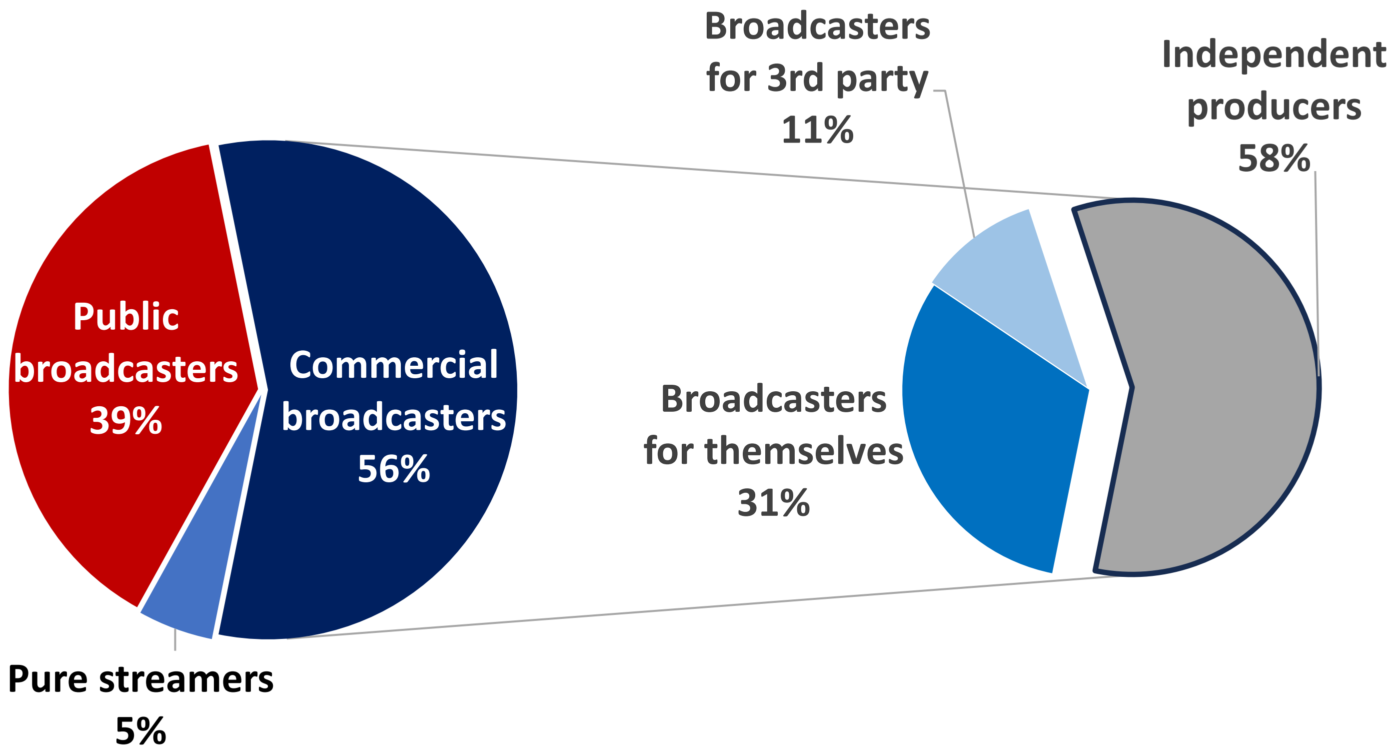


Comparatively low share of pure streamers : no production of daily drama

WARNING *No notion of IP ownership in this slide!*

AND THE ROLE OF BROADCASTERS IN PRODUCTION

Around 15 500 hours in 2023
Down 3% from 2022



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FINAL REMARK

THE LIMITS OF PAN-EUROPEAN FIGURES

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