

Market Presentation



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Commercial broadcasting and streaming in numbers

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THE SCENE

8 300
commercial
TV channels

3 100
commercial
on-demand
services

THE MARKET

76bn EUR in
2023

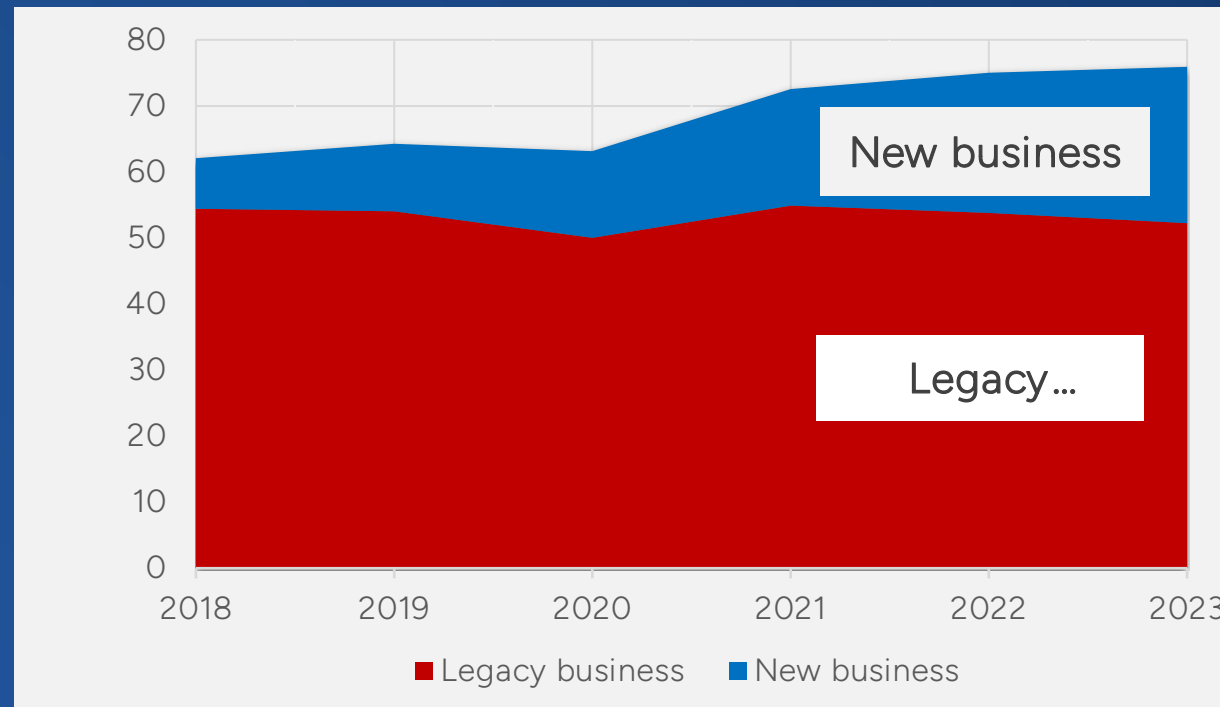
Excluding ≈ 13 bn of
diversification revenues

Pay services
43 bn EUR

Advertising
33 bn EUR

TRANSFORMATION

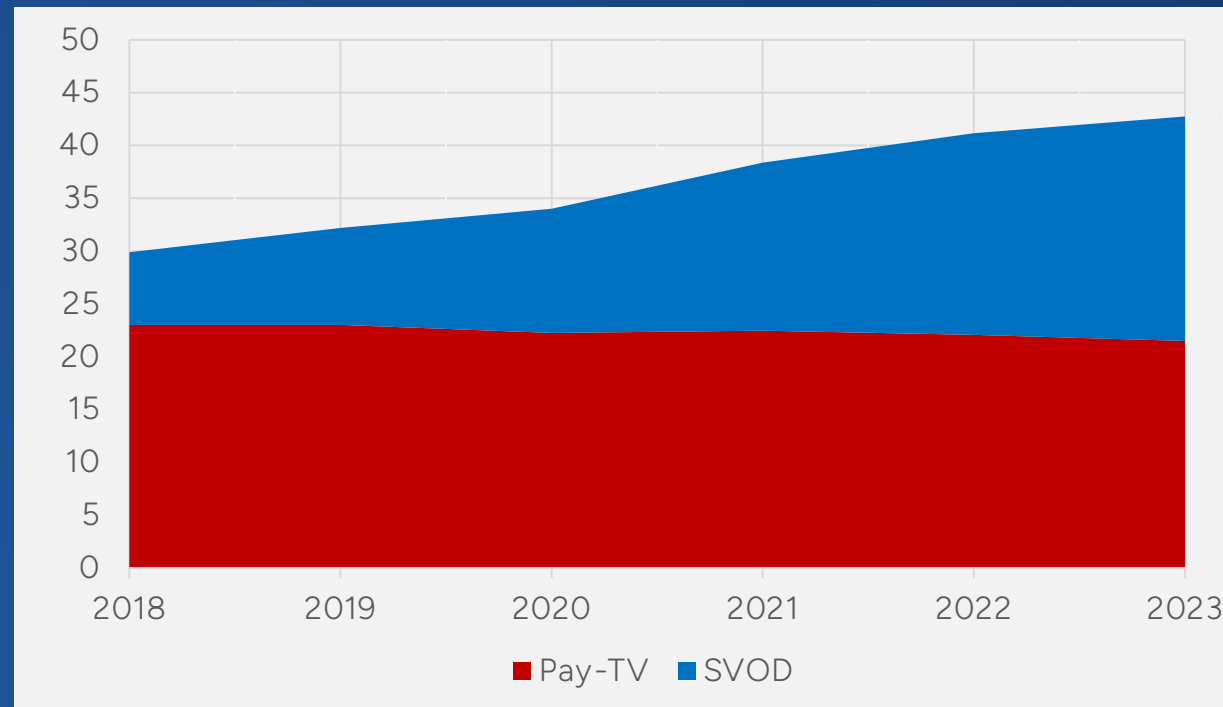
4% average
annual
growth
since 2018



AVOD+SVOD
= 31%

TRANSFORMATION

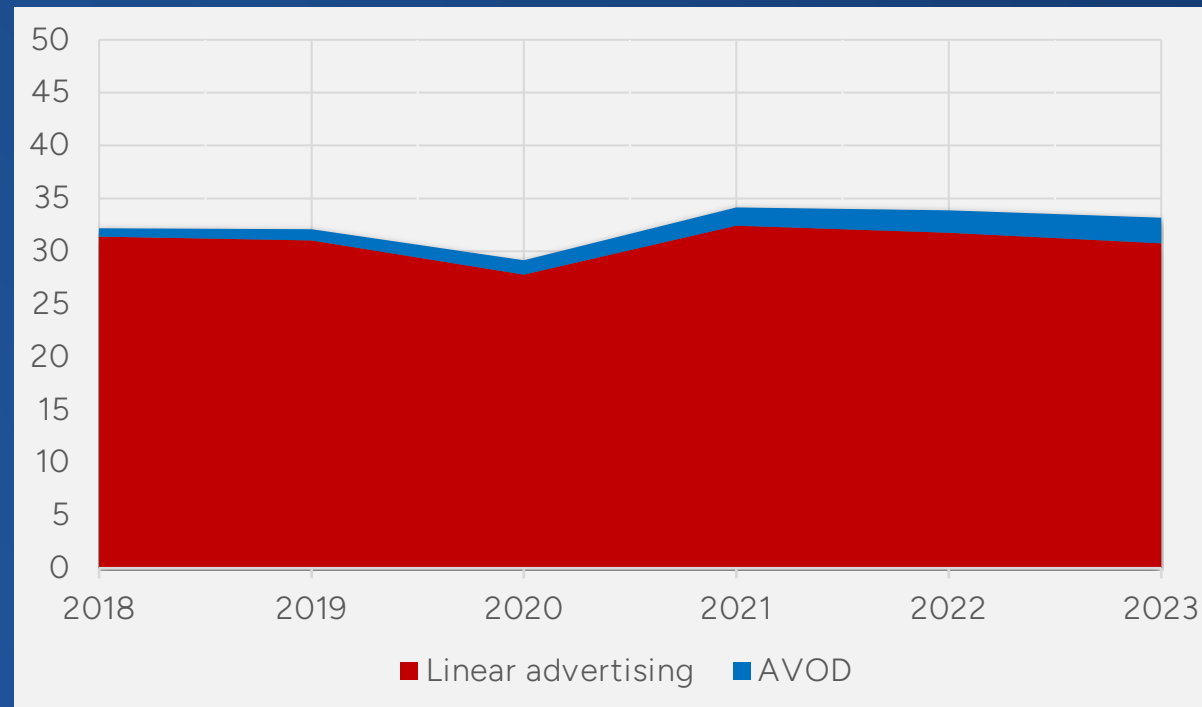
Pay services
43 bn EUR



*SVOD
accounts for
50% of the
pay market*

TRANSFORMATION

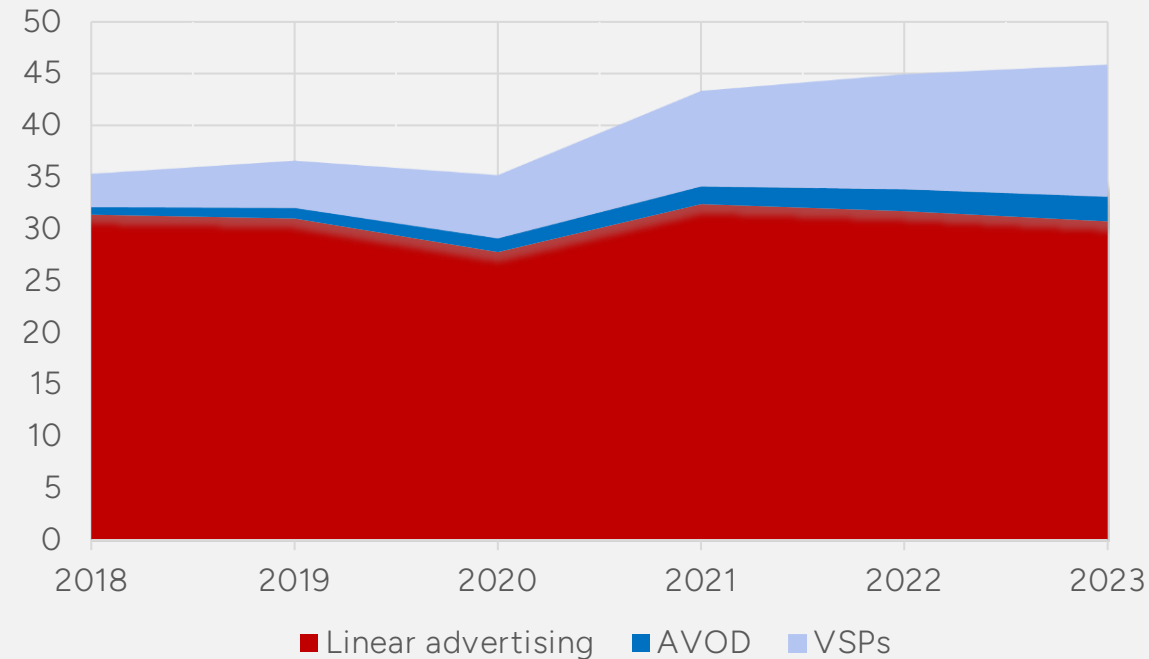
Advertising
33 bn EUR



AVOD = 8%
of
advertising
BVOD = 80%
of AVOD

TRANSFORMATION

Advertising
33 bn EUR



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

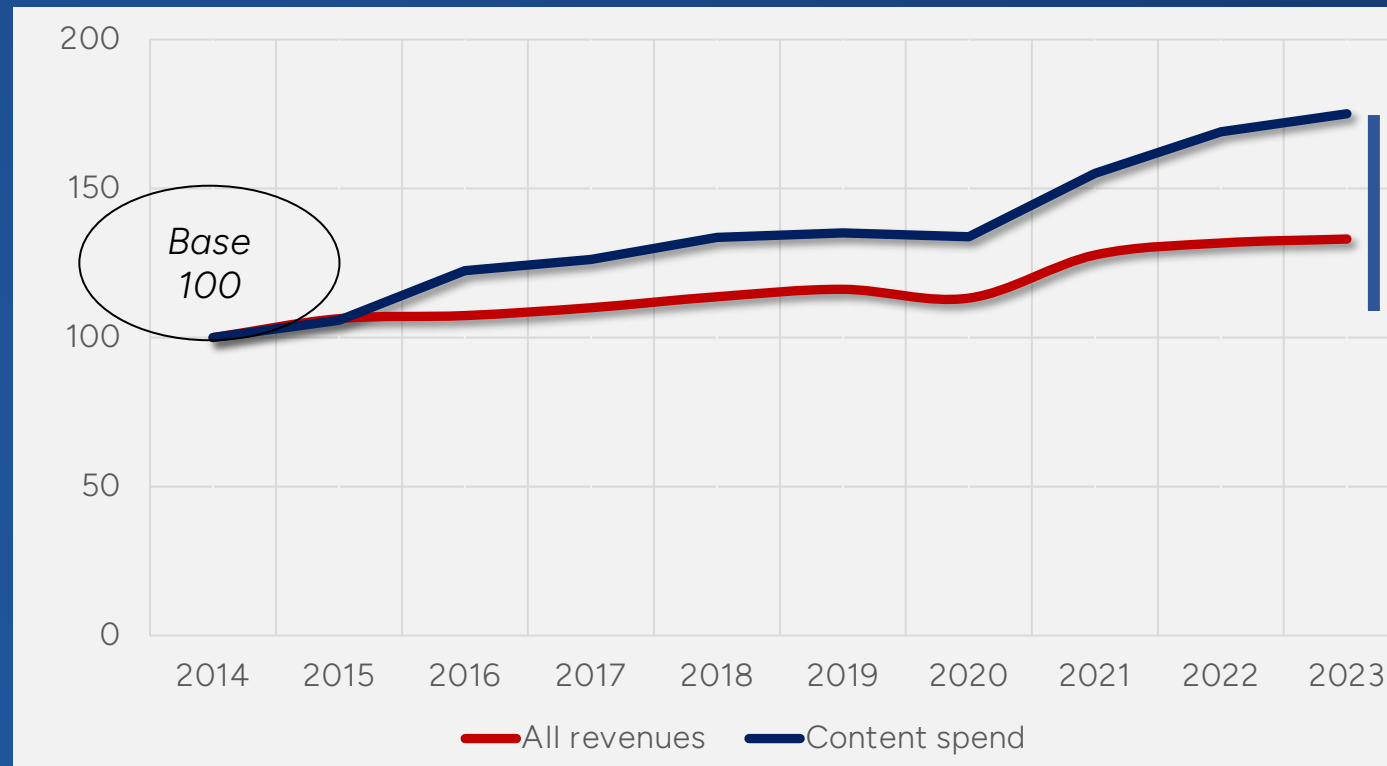
CONTENT-BASED COMPETITION

43 bn
content
spent in
2023

+ news

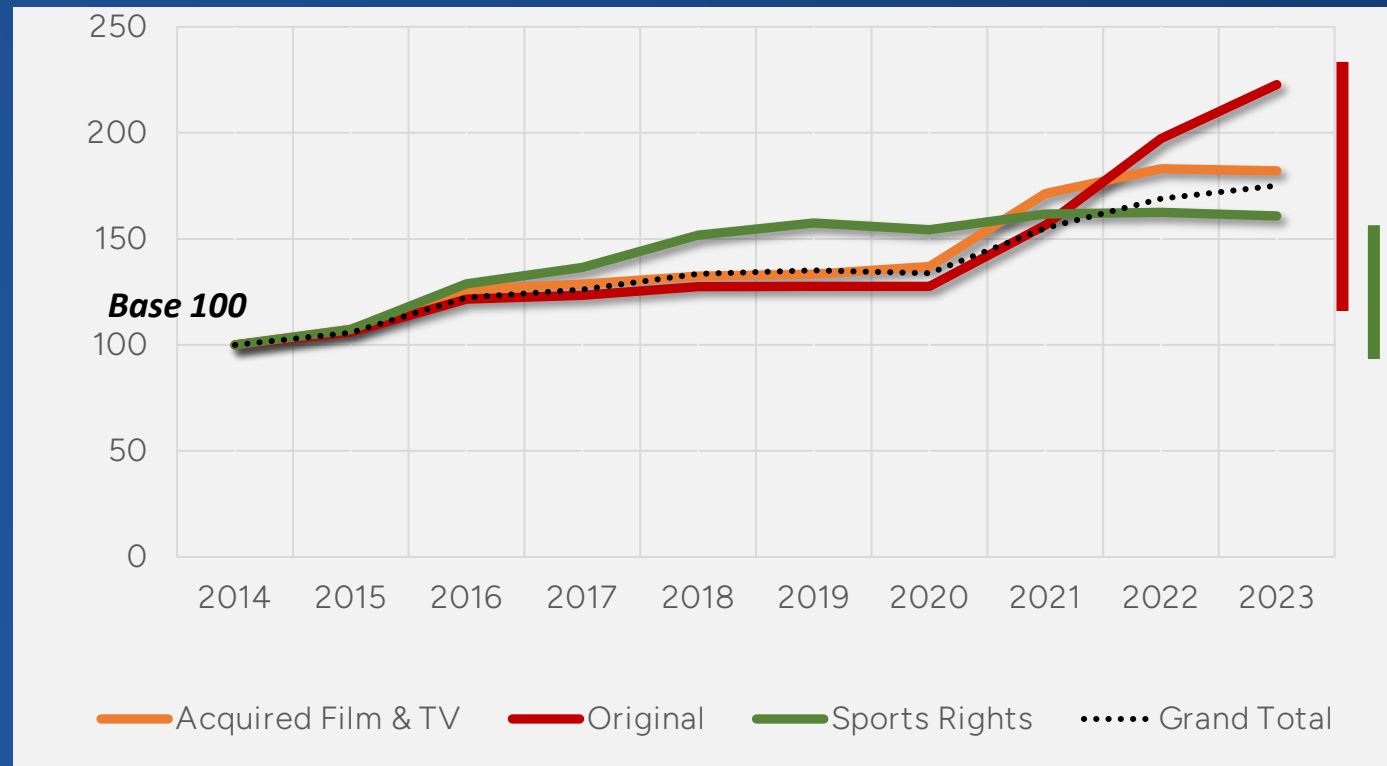
6% average
annual
growth
since 2014

CONTENT-BASED COMPETITION



SVOD drove a strong increase in content spend

CONTENT-BASED COMPETITION



Spend in original European content doubled since 2014

Sport rights inflation came to a halt

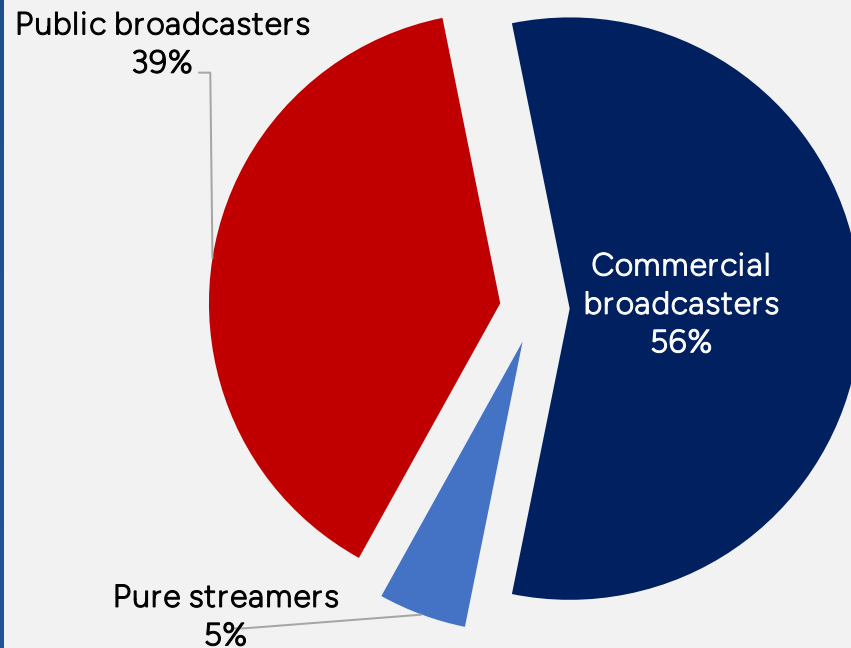
A FOCUS ON TV/SVOD FICTION COMMISSIONING

Around 15,500
hours in 2023

Down 3% from 2022



*No notion of IP
ownership in this slide!*



Comparatively
low share of
pure streamers
No production of
daily drama

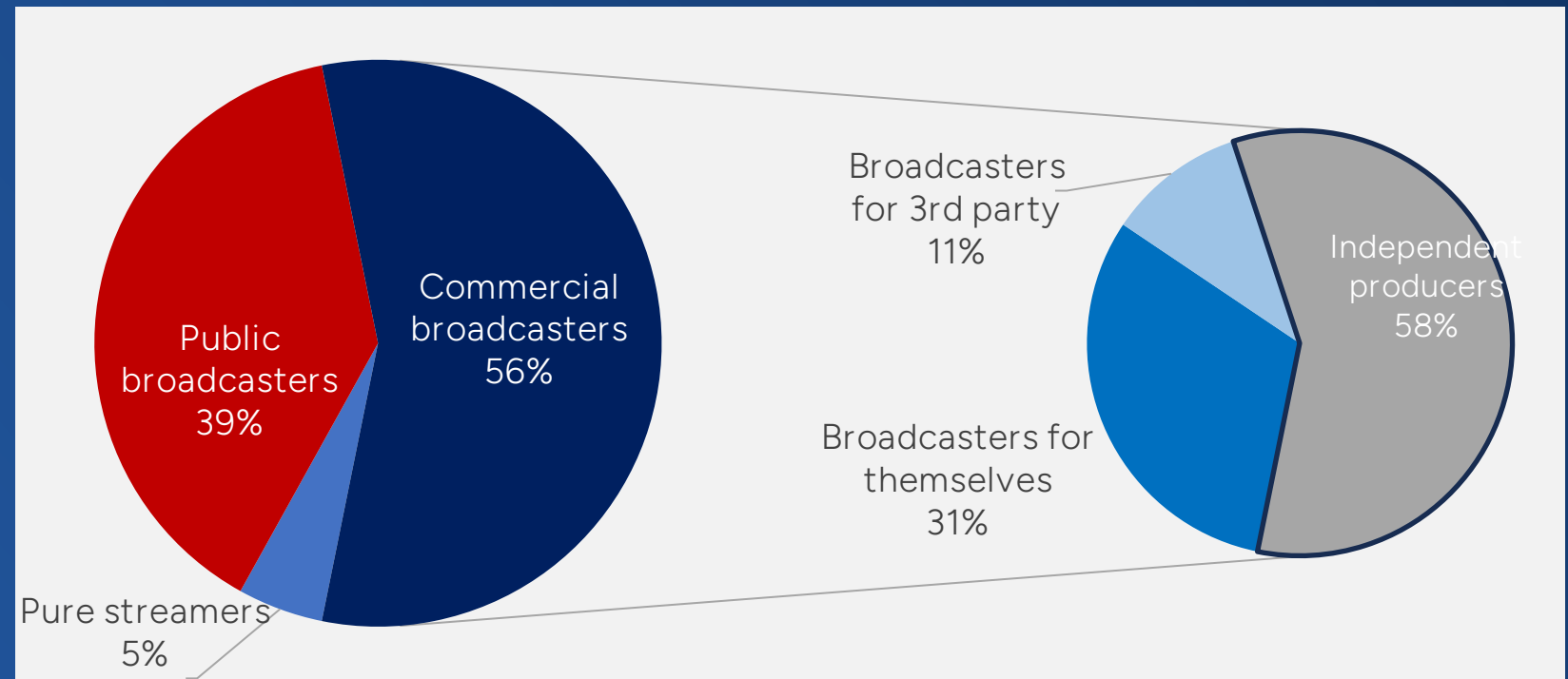
AND THE ROLE OF BROADCASTERS IN PRODUCTION

Around 15,500
hours in 2023

Down 3% from 2022



*No notion of IP
ownership in this slide!*



FINAL REMARKS

The limits
of...

... pan-
European
figures