

TABLE OF CONTENT

INTRODUCTION

- 0 **COVID-19 as an accelerator** 6

PRODUCTION

- 1.1 **Film financing: Public support and broadcasters remain principal sources** 8
- 1.2 **Gender equality: Still few female directors and screenwriters** 10
- 1.3 **TV fiction: High-end TV series lead production growth** 12
- 1.4 **Investment, budget and production rebound** 14
- 1.5 **The nationality of European works and the revised AVMSD** 16

CIRCULATION

- 2.1 **VOD: TVOD driven by films, SVOD by TV series** 18
- 2.2 **Prominence on TVOD: European films are not discriminated** 20
- 2.3 **Do films make it from cinemas to VOD?** 22
- 2.4 **European film exports down in Europe, up in North America** 24

AUDIOVISUAL SERVICES

- 3.1 **Pre-Brexit fragmentation of TV channel supply** 26
- 3.2 **SVOD erodes linear TV viewing** 28
- 3.3 **Diversity and inclusion in the audiovisual industries** 30

MARKETS

- 4.1 **Focus on Observatory presidency country: United Kingdom** 32
- 4.2 **Trouble began before the COVID-19 crisis** 34
- 4.3 **COVID-19: Certain countries more at risk** 36
- 4.4 **Cinema exhibition still developing in 2019** 38
- 4.5 **Cinema: US market share in the EU up in 2019** 40
- 4.6 **Cinema: More than 1 billion admissions in the European Union in 2019** 42
- 4.7 **Home video: Physical retail drops to 50%** 44
- 4.8 **E-commerce advertising, the new online advertising star** 46
- 4.9 **Pay TV: Italy weighs on European growth** 48
- 4.10 **Tippling point for direct-to-consumer streaming services?** 50

PLAYERS

- 5.1 **The biggest are becoming bigger** 52
- 5.2 **More US companies among main Europe players** 54
- 5.3 **Downward financial trend for public broadcasters** 56
- 5.4 **TV production: European consolidation and internationalisation** 58
- 5.5 **Measures taken in the audiovisual sector** 60