TABLE OF CONTENT

INTE	RODUCTION	
0	The creator economy vs. TV advertising	6
CRE	ATION	
1.1	Writers and directors of European works: Are TV series really the lifeline?	8
1.2	Parity in film and TV fiction production: DOPs and composers lag behind	10
1.3	Adaptations more common in co-productions?	12
1.4	Regulating influencers: the media law perspective	14
PRO	DUCTION	
2.1	European film production continues to expand	16
2.2	Film financing: Growing importance of incentives as financing source in 2021	18
2.3	Downturn in TV fiction production	20
2.4	Defining independent producers/production of European works	22
EXP	LOITATION	
3.1	European films are increasingly reliant on national markets	24
3.2	High share of theatrical films broadcast on TV	26
3.3	EU27 works in VOD catalogues were mostly non-national	28
3.4	SVOD usage in the EU: concentrated, and dominated by US content	30
3.5	How do European films perform on TV?	32
AUD	IOVISUAL SERVICES	
4.1	US players lead in market presence	34
4.2	TV audiences: Heterogeneous European landscape	36
4.3	EUR 22 billion spent on European original content in 2023	38
4.4	From traditional media literacy to AI literacy skills	4(
MAR	RKETS	
5.1	Growth, apparently	42
5.2	Cinema attendance in Europe keeps growing	44
5.3	Home video: SVOD to close the gap on DVD	46
5.4	Advertising – a digital future for ad spend in Europe	48
5.5	Pay TV: Pressure on prices has abated, demand still limited	50
5.6	SVOD revenues are still a growth driver in Europe	52
PLA	YERS	
35.31	The big get bigger	54
6.2	Telcos fuel European AV players' revenue growth	56
	Public broadcasters in Europe: rich and poor	58
61	A competitive market for fiction series	60