

Exploring the impact of the COVID-19 crisis on the European audiovisual sector

MAY 2020



COUNCIL OF EUROPE

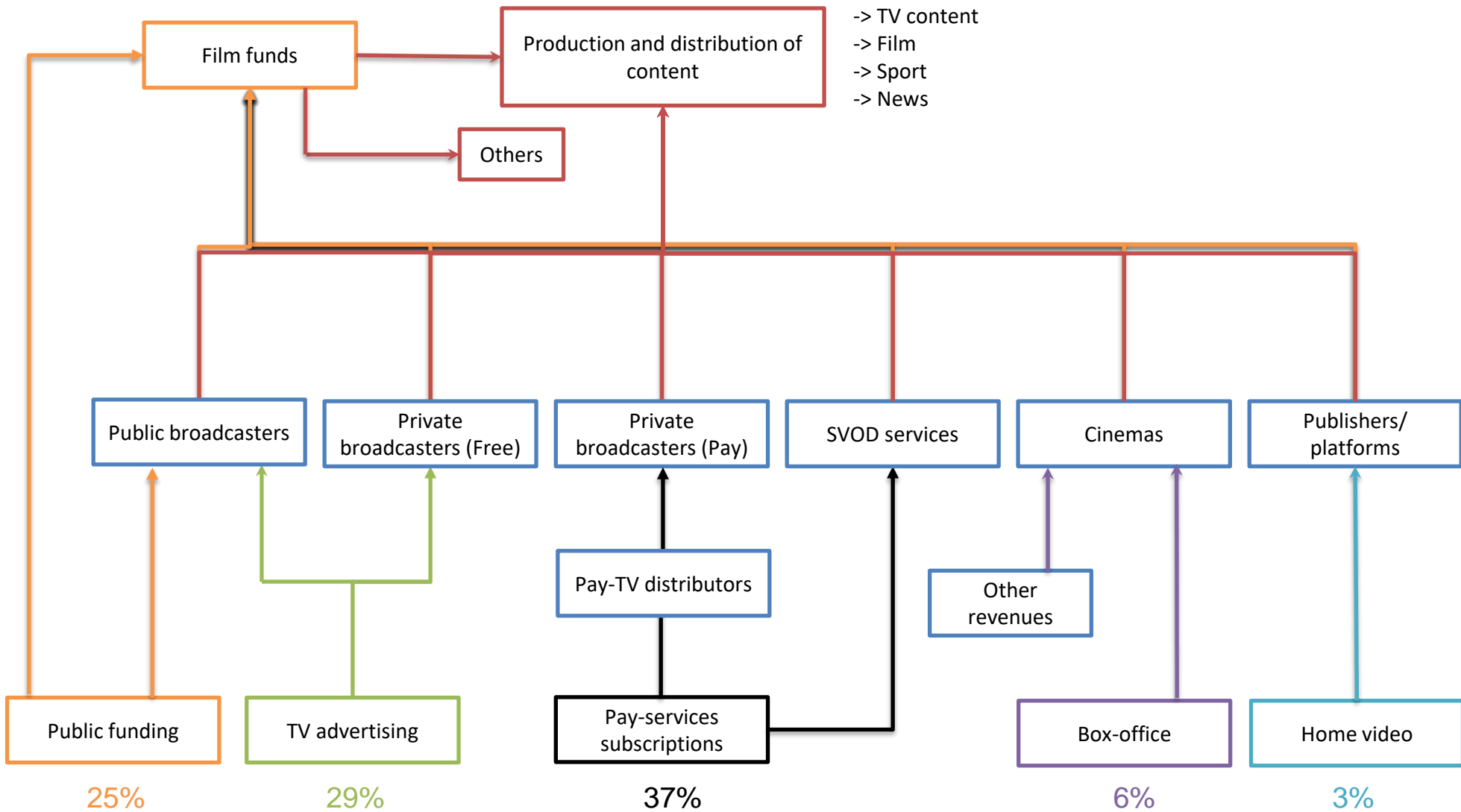


CONSEIL DE L'EUROPE

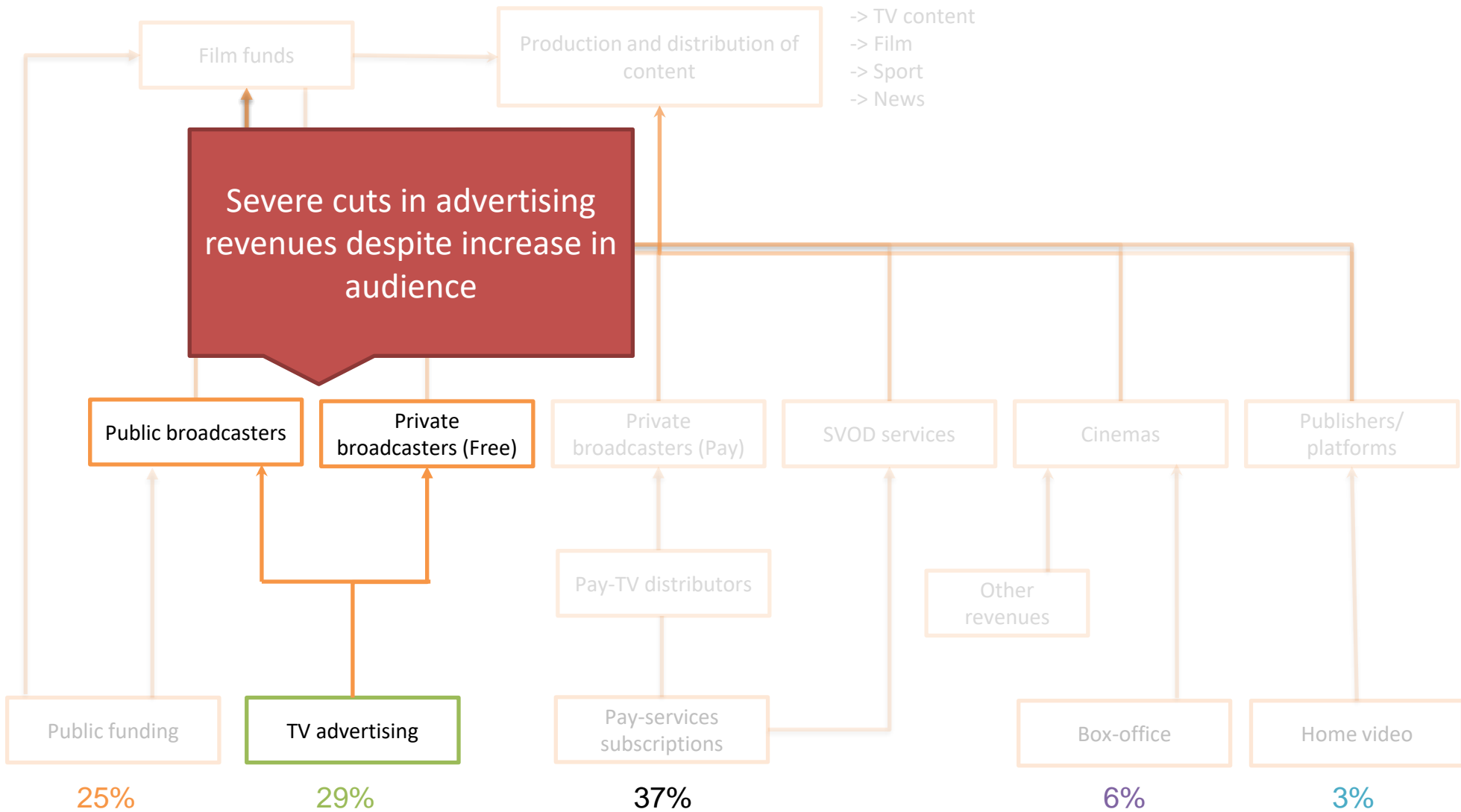
- 1. Is COVID-19 a punctual crisis or will it have long-lasting impacts?**
- 2. Is COVID-19 disrupting the sector or accelerating existing trends?**

NOW

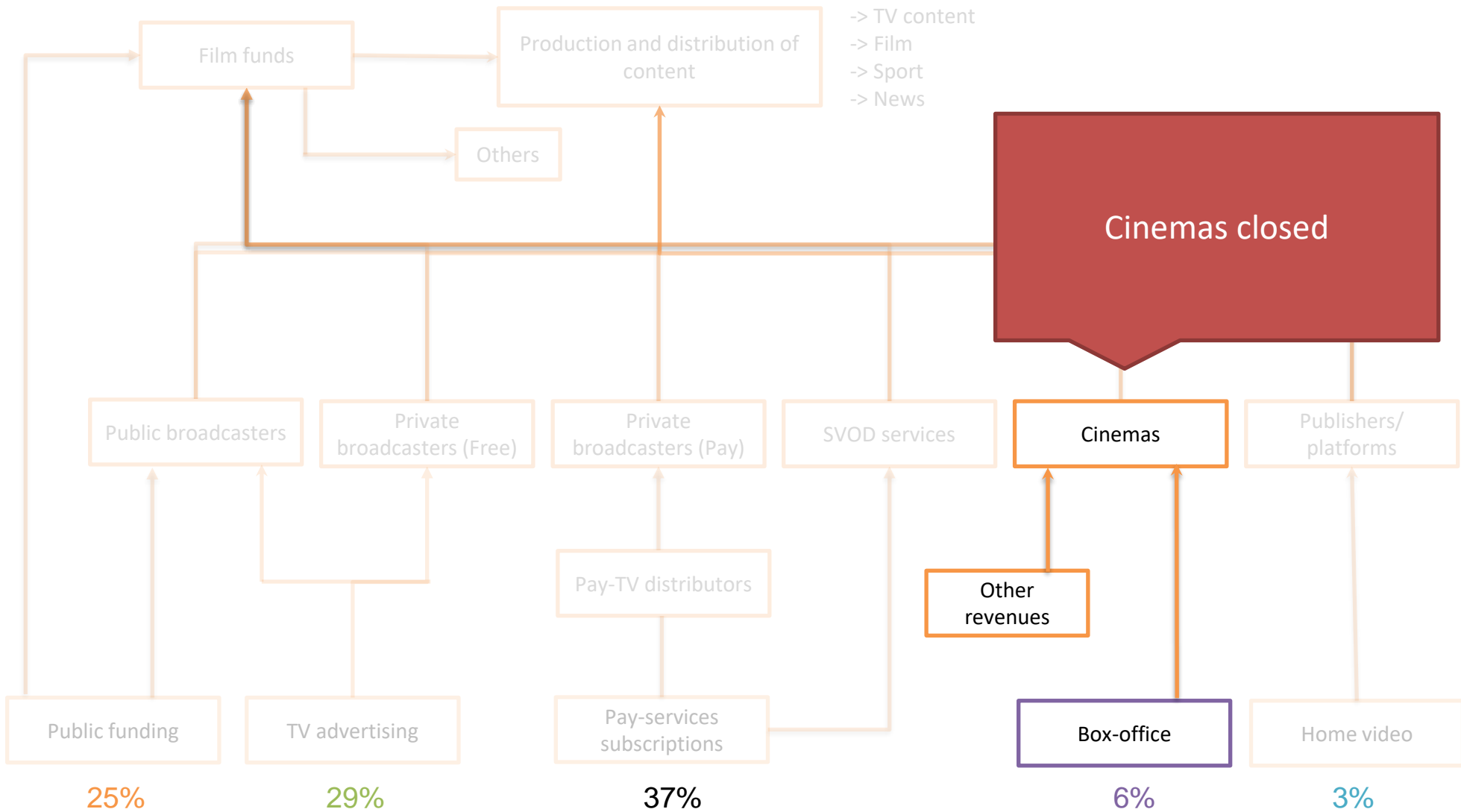
FINANCIAL FLOWS IN THE AV SECTOR



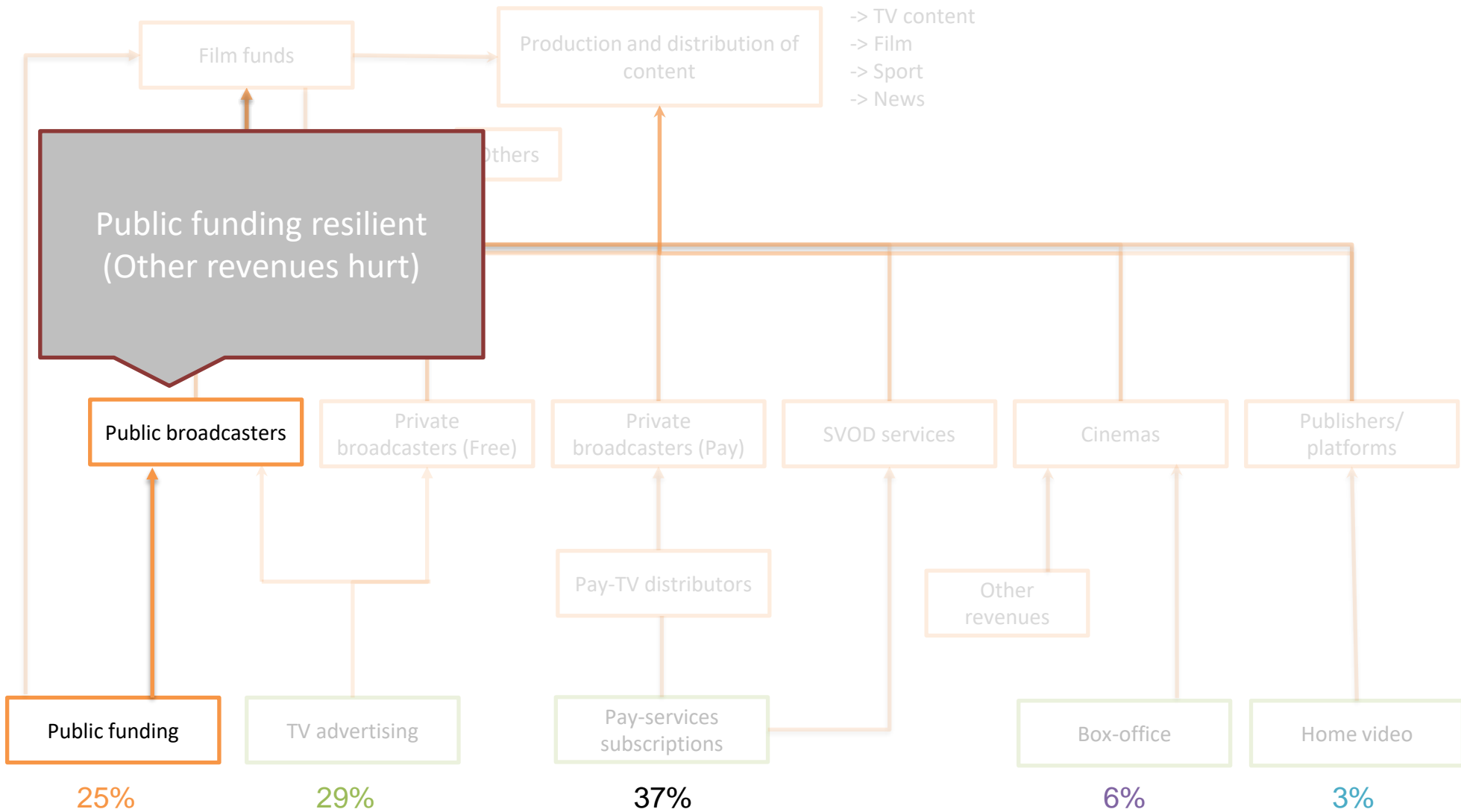
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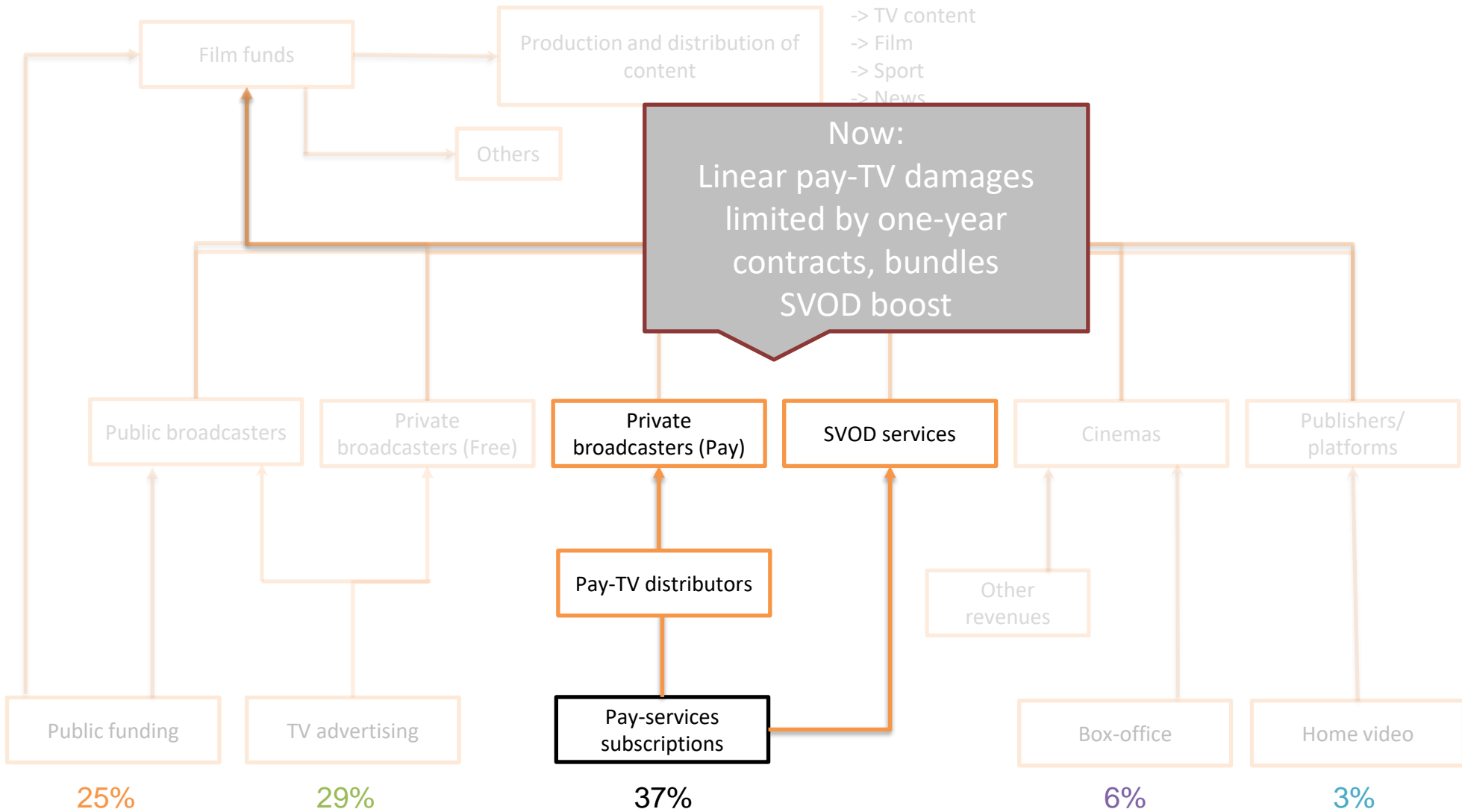
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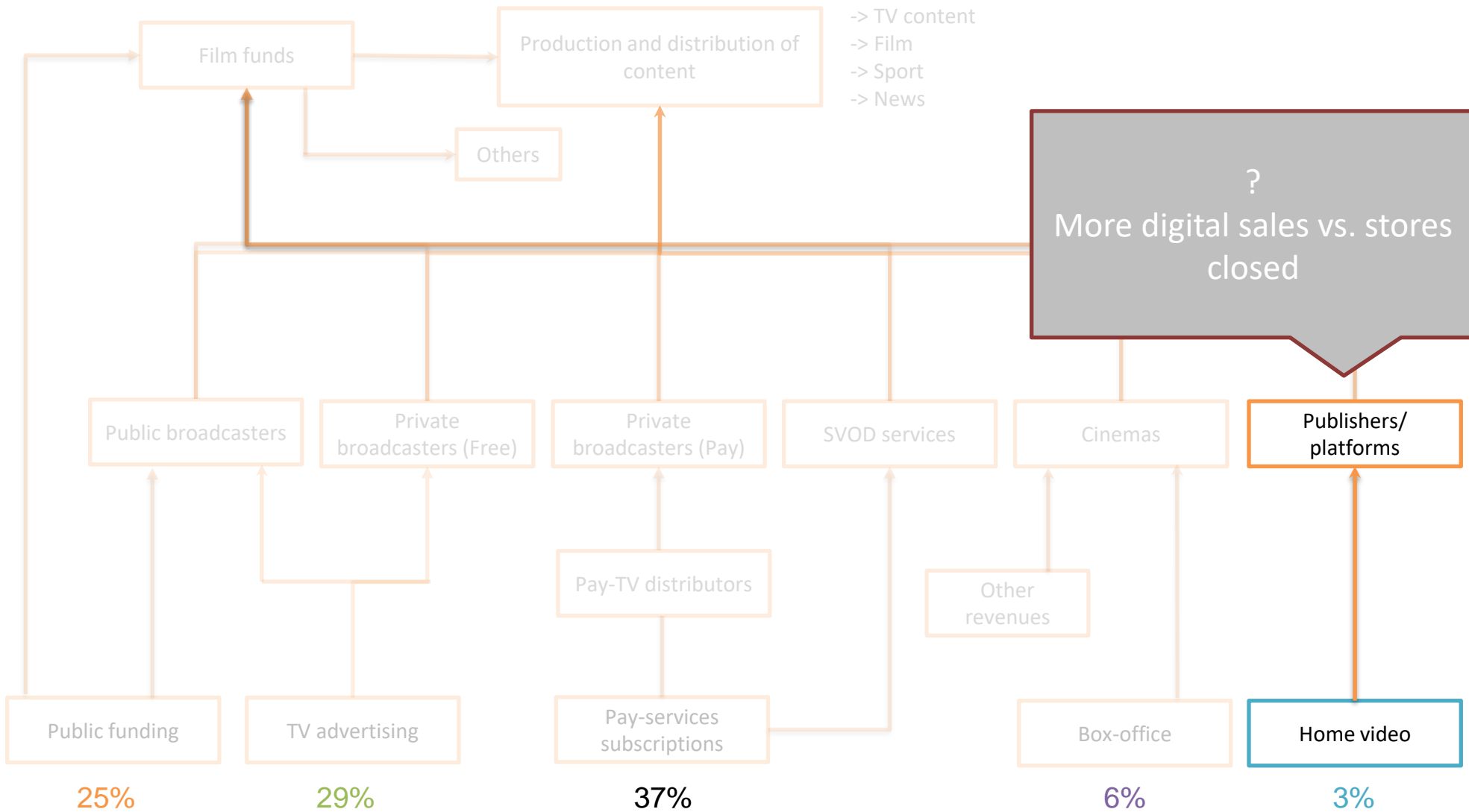
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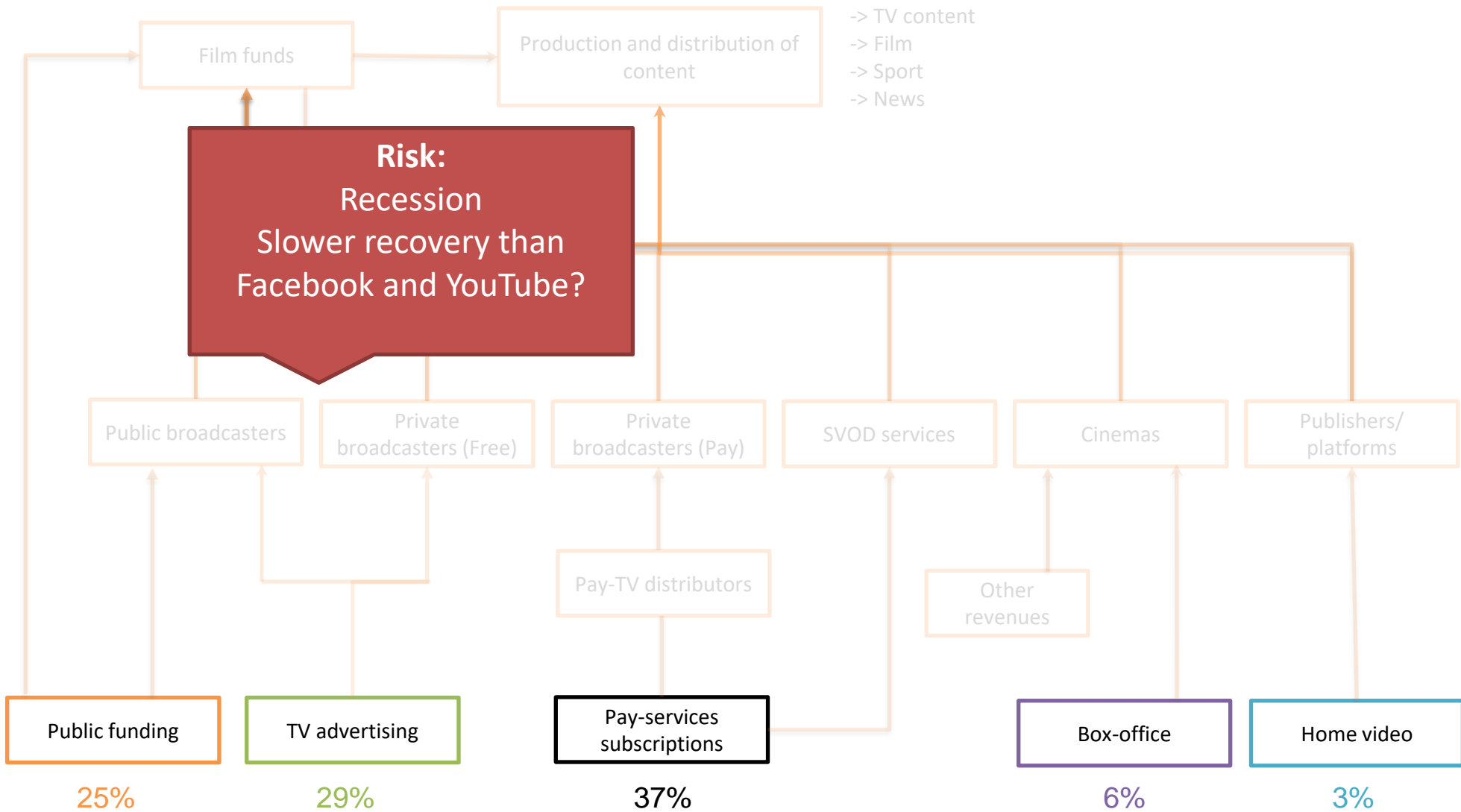


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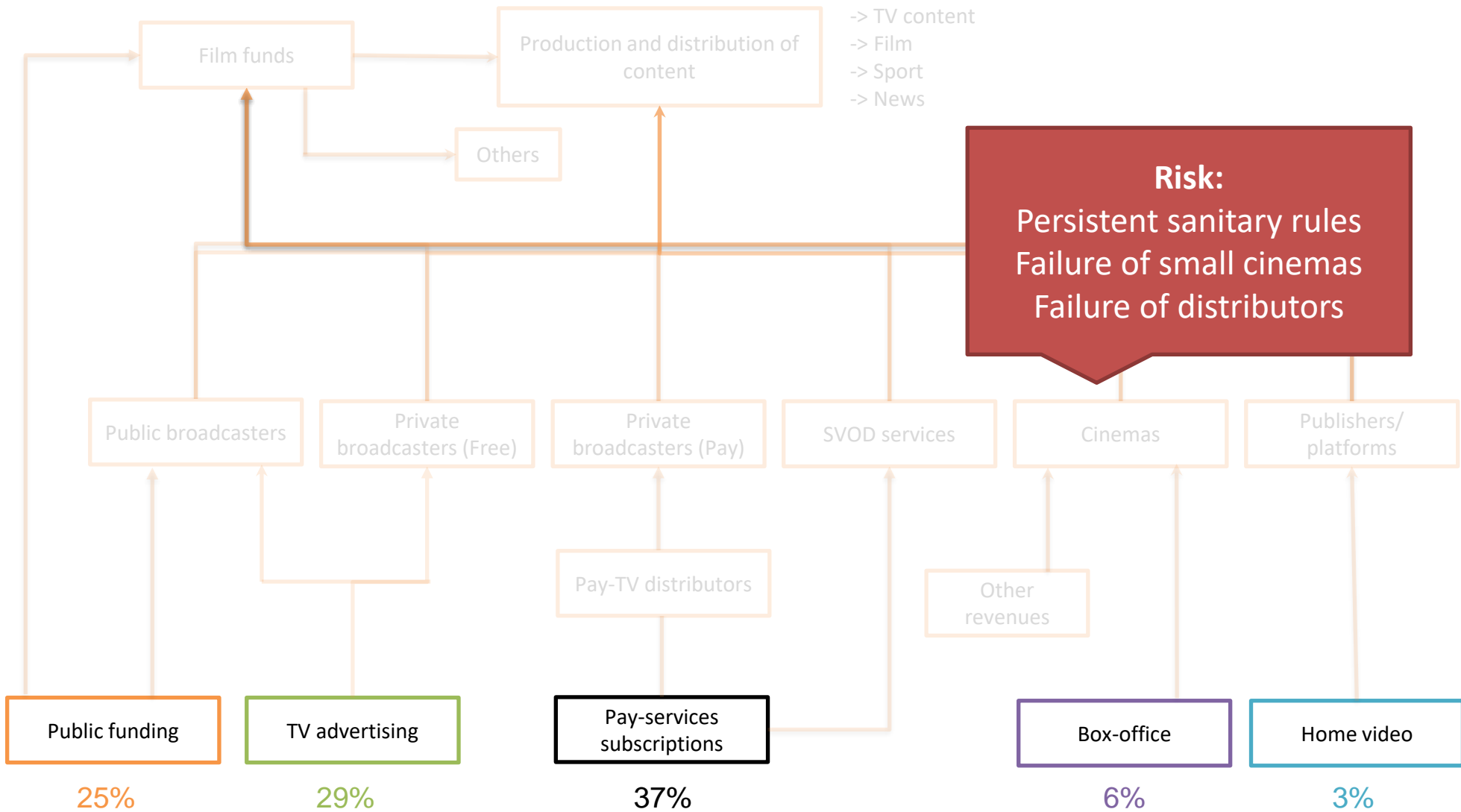


THE RISK

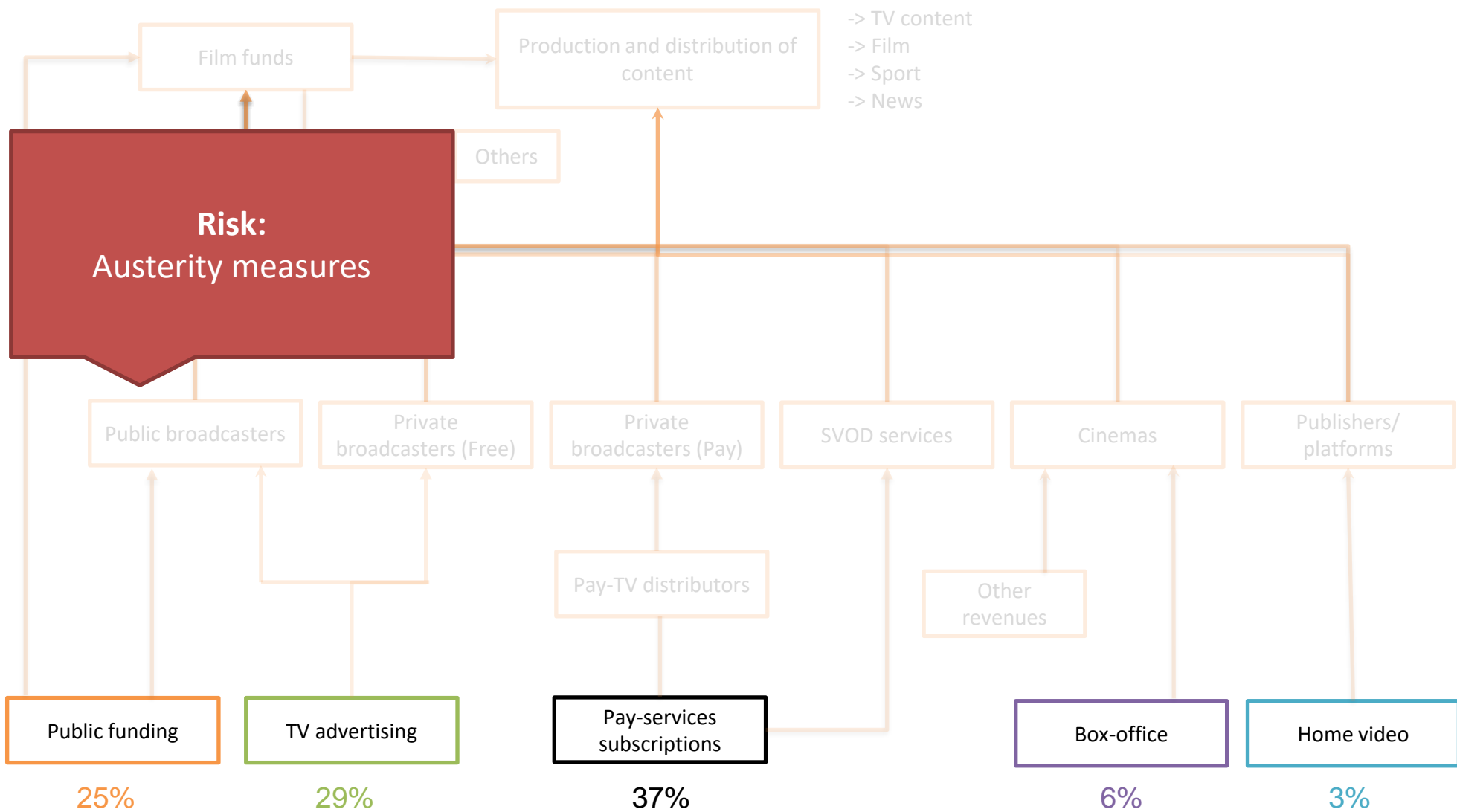
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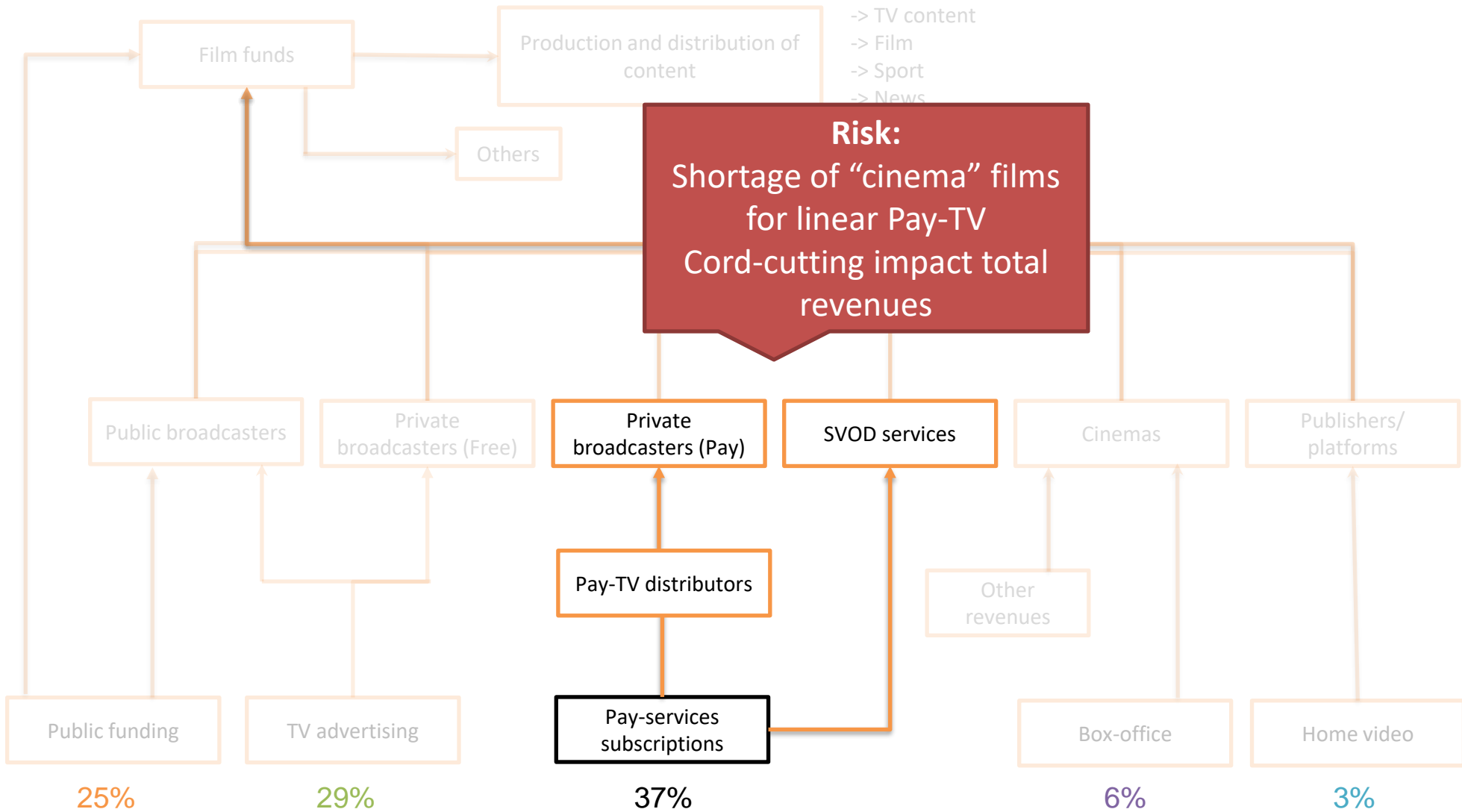
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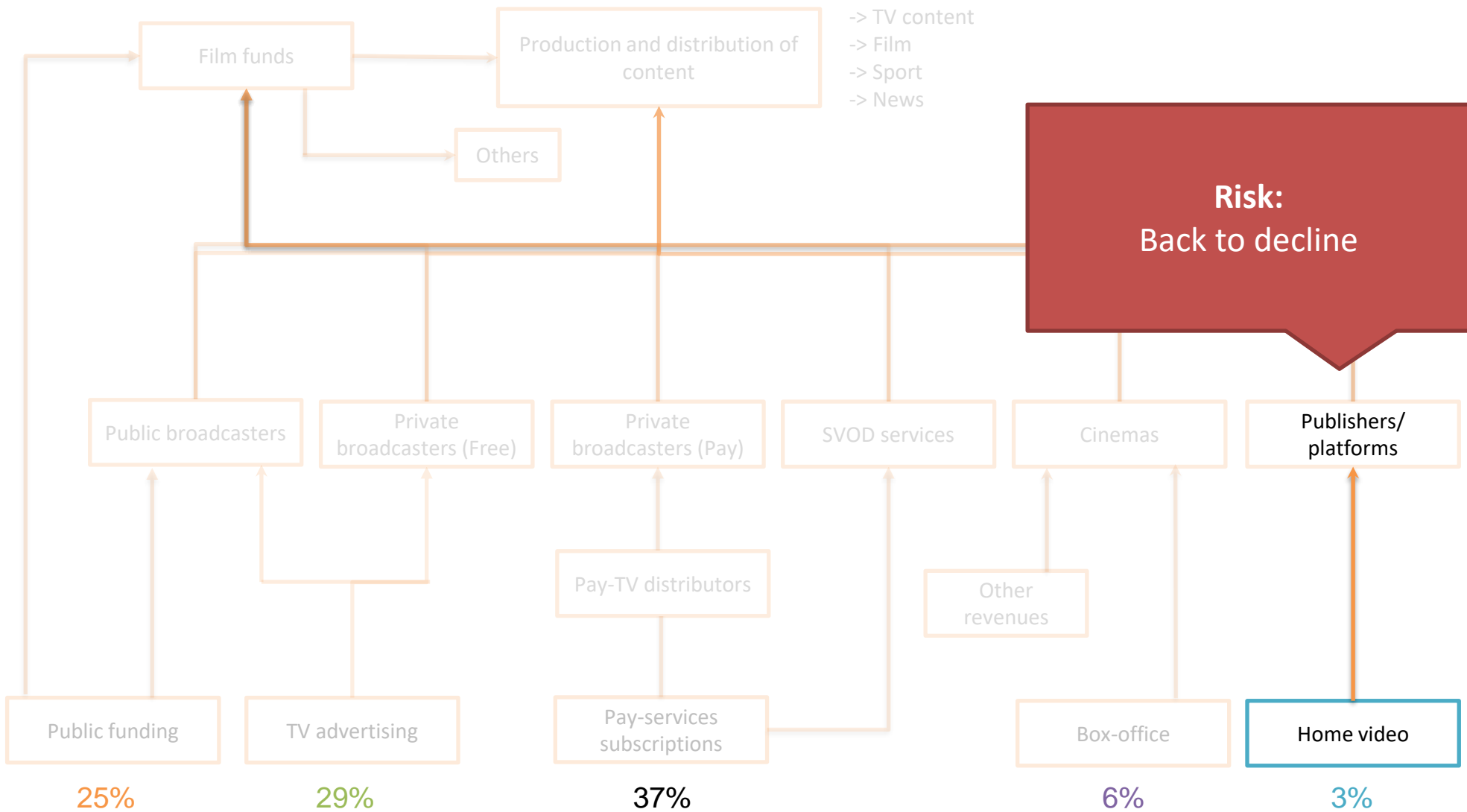
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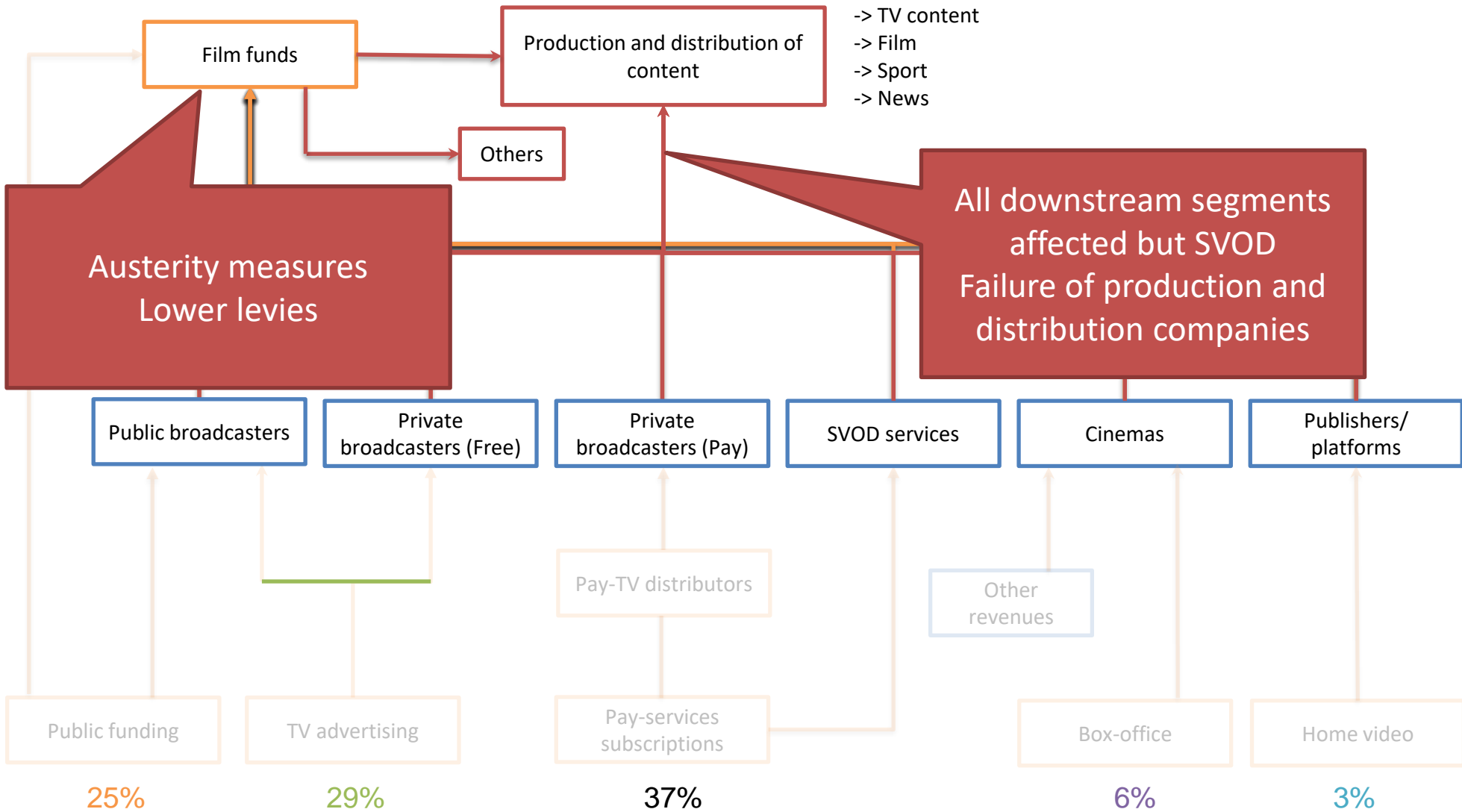


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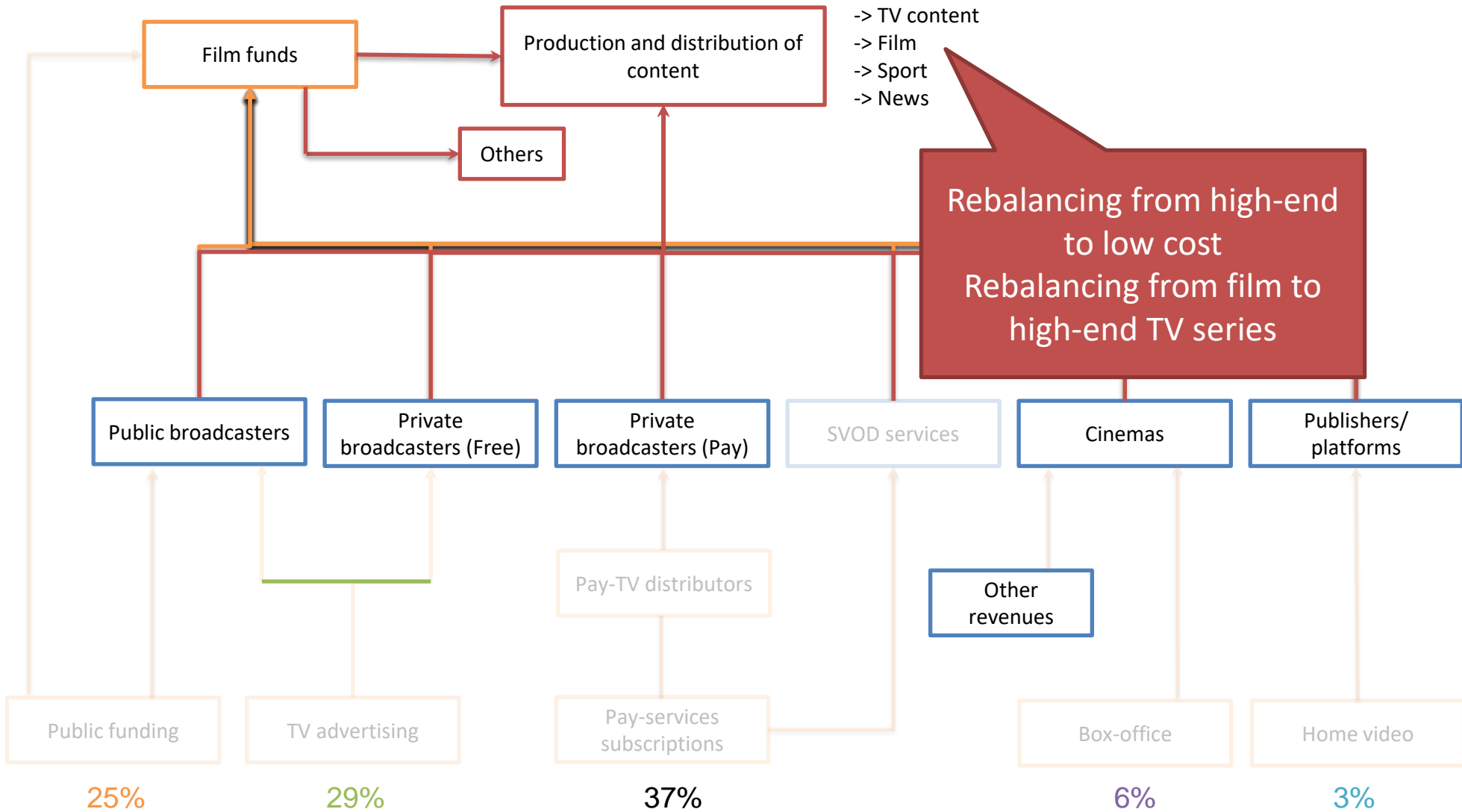


THE IMPLICATIONS FOR CONTENT PRODUCTION

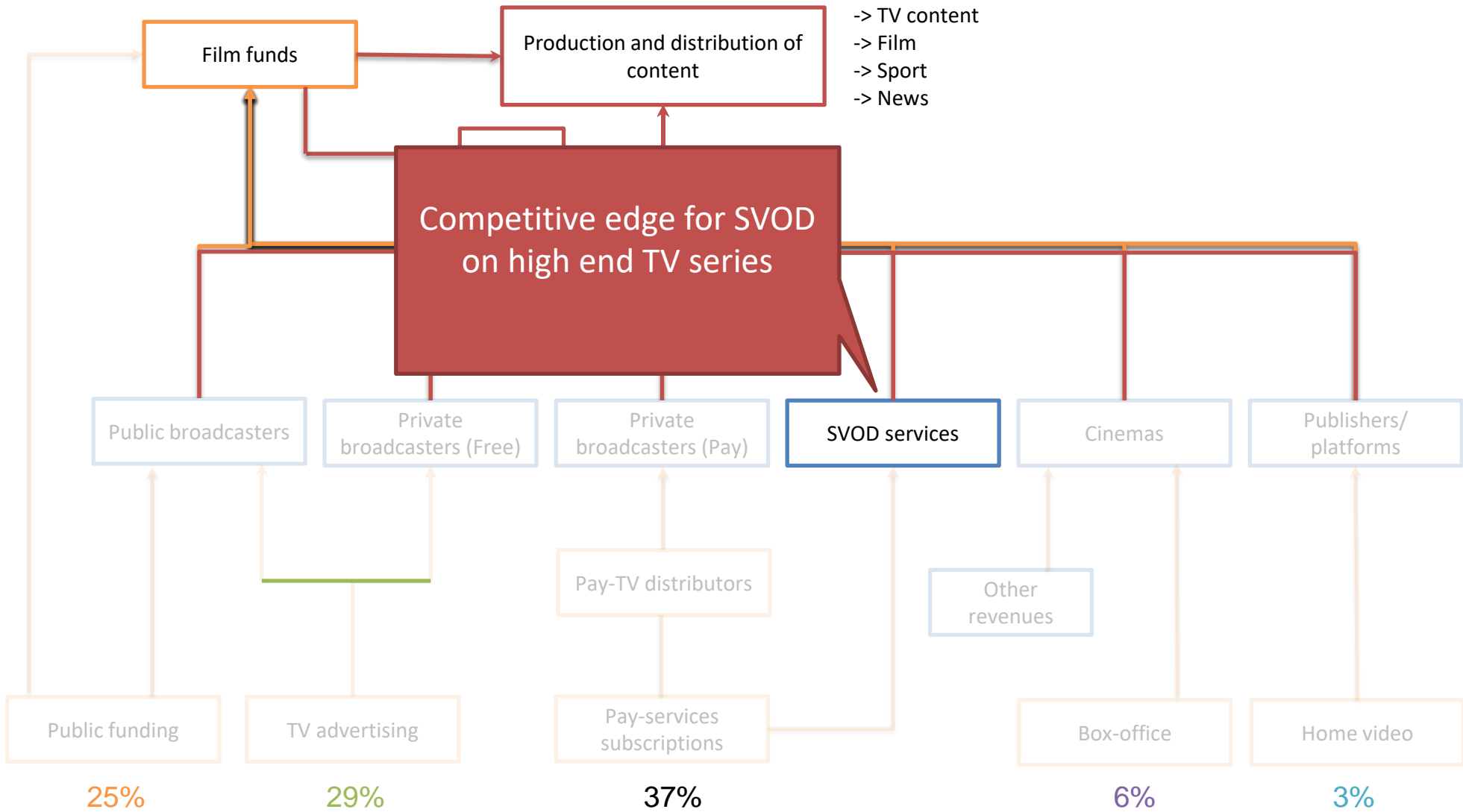
PRODUCTION



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1. All resources of legacy players at stake:

- **TV advertising is in absolute value the highest risk for the sector**
- **Public funding (mainly of PSBs) will be key to the resilience of the sector**
- **Cord-cutting is likely to accelerate**

2. SVOD reinforced but not likely to compensate for losses from legacy players

3. Risk of decrease of European high-end production

MY PERSONAL TAKE

- 1. COVID-19 will have long-lasting impacts**
- 2. COVID-19 is accelerating and amplifying pre-existing trends**

More information:
www.obs.coe.int
Gilles.Fontaine@coe.int

