

# Audiovisual fiction production in Europe

## 2020 figures

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# Introduction and methodology

**This report provides an analysis of the production of audiovisual fiction in Europe in the period 2015-2020(\*). Audiovisual fiction is defined here as live-action fiction TV films and series commissioned by television channels or on-demand services.**

## The data

- ▶ The underlying data used in this report were provided by the European Metadata Group. The European Metadata Group systematically reviewed the programming schedules of over 200 TV channels and on-demand services to identify original European fiction. The selected services are the respective TV and SVOD audience leaders in the tracked countries. Although some minor channels may also produce some original fiction, most of them are dedicated to reruns or imported programming.
- ▶ The data provided by the European Metadata Group was complemented by the European Audiovisual Observatory.
- ▶ Other sources used for this report include IMDb, to identify the screenwriters and directors of European fiction, and the Observatoty LUMIERE database, to identify the audiovisual fiction directors also active in theatrical films.

## Definitions

- ▶ In this report, a “title” refers to either a TV film or a TV season. Each different TV season of a TV series is counted as one title.

(\*) EU27 + the United Kingdom

- ▶ Titles have been broken down by **format**: TV films, 2- to 13-episode series, 14- to 52-episode series, and more-than-52-episode series. A limited number of TV films have 2 episodes; they are nevertheless considered TV films. Some TV films belong to **collections** (e.g. Germany's "Tatort" or France's "Meurtres à...") with several episodes produced each year. They are either counted as TV films (if different production companies are involved) or TV series (if the same production company produces all episodes).
- ▶ The **year of production** of a whole series season is the year of release of the first episode of the season.
- ▶ The **country of origin** of an audiovisual fiction is the country of the main commissioner of the programme. In the case of programmes commissioned by a pan-European SVOD service, the country of origin is determined by the production company.
- ▶ **International co-productions** are analysed following a broad definition (any programme with at least two producing countries) or a stricter definition, excluding "linguistic co-productions" between neighbouring countries (DE-AT, FR-BE, FR-CH, GR-CY, BE-NL, DE-CH, CZ-SK, GB-IE).
- ▶ In this report, "**independent production**" is defined as an AV fiction produced by a production company that is not under the control of the broadcaster *commissioning the programme*. This definition does not imply that the producing company retains any rights. Please note that productions from a broadcaster production unit or subsidiary can therefore be either dependent (when produced for the broadcaster) or independent (when produced for a broadcaster from a different broadcasting group).
- ▶ In this report, "**Europe**" refers to the 27 member states of the European Union + the United Kingdom + Norway + Switzerland.

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## Key findings

## In 2020, COVID-19 impacted on the production and release of original TV fiction

- ▶ The Observatory figures are based on the date of release of original fiction series. The impact of COVID-19 is therefore not fully reflected as series released in 2020 may have been produced earlier.
- ▶ However, 2020 data show a drop in the volume of hours produced (over 600 hours, or -4%), which can be mainly attributed to the interruption of the shooting of telenovelas/soaps in certain countries.
- ▶ The uninterrupted growth of short series (with to 2 to 3 episodes) continued but slowed down (+5% in 2020 vs. +11% on average between 2015 and 2020).

## COVID-19 did not affect some of the fundamental characteristics of TV production in Europe

- ▶ Telenovelas/soaps account for the bulk (60%) of hours produced.
- ▶ More than half of all titles produced are 2- to 13-episode-season series. The average number of episodes per season and the average duration of episodes is slowly decreasing, probably as a way to cope with the increase of budgets.
- ▶ The production of TV films appears to be following a downward trend.

## The production mix varies deeply between countries

- ▶ With large volumes of telenovelas/soaps produced each year, Greece and Spain are the leaders in volume of hours produced. Hungary and Portugal are two other examples of countries driven by more than 52-episode-per-season series.
- ▶ Germany however, produces the highest number of different titles, in particular with more focus than the average country on TV films.
- ▶ When focusing on shorter seasons (2 to 3 episodes), the UK is by far the main producer, ahead of Germany and France. Figures suggest a production boom for such TV series in Scandinavia and Spain.

## After a peak in 2018, fewer international co-productions in 2019 and 2020

- ▶ International co-productions account for 10% of all fiction titles and are mostly limited to TV films and to 2- to 3-episode-season series.
- ▶ The majority of international co-productions used to be between two neighboring countries sharing the same language (e.g. France and Belgium; Germany and Austria). But non-linguistic co-productions increased in 2020 and represented close to 65% of all co-productions.
- ▶ Non-linguistic co-productions are driven by: the United Kingdom (mainly as a majority co-producer, often with the United States but also with Canada and France); Germany (often as a minority co-producer and often with Scandinavian countries); projects between two or more Scandinavian countries. Spain, despite the recent production boom, has relatively few co-productions, maybe because of the weight of Netflix in new fiction projects (Spain ranks second – after the United Kingdom – in number of fiction projects commissioned by the global streamers).

## BBC, Netflix and ARD are the 3 main commissioners of 2- to 3- episode series

- ▶ In 2020, public broadcasters accounted for 57% of all fiction titles commissioned, and private broadcasters for 61% of hours: public broadcasters focus proportionally more on TV films and short series, and private broadcasters on telenovelas/soaps.
- ▶ In a market constrained by COVID-19, global streamers released 71 original European series in 2020, vs. 49 in 2019, with close to 70% commissioned by Netflix.
- ▶ US groups also contribute to the production of European fiction through their Europe subsidiaries (e.g. Comcast, Discovery).



## Production groups: Huge turnover, leading groups

- ▶ Almost 1 200 production companies/groups produced at least one fiction title between 2015 and 2020, but only 7% of them produced at least one title in each of the last six years. This significant turnover can be attributed to the intense renewal of TV series: on average, between 2015 and 2020, first seasons accounted for 45% of all seasons produced each year.
- ▶ In 2020, independent productions accounted for 77% of all titles produced, with 12% from production groups affiliated with a broadcaster but working for a third-party broadcaster and 65% from production groups independent from any major broadcaster.
- ▶ Banijay, Mediawan and RTL group were the three main producers of independent TV fiction.

## About 8 200 screenwriters involved in the production of TV fiction between 2015 and 2020

- ▶ Only 55%, though, were active in just one year between 2015 and 2020, and only 4% were credited for at least one episode during each of these six years.
- ▶ Excluding more than 52-episode-season series, a screenwriter, when active, (co)wrote 5.5 episodes per year; but when considering all screenwriters identified between 2015 and 2020, the figure falls to 1.7, as screenwriters are, on average, far from being active each year.
- ▶ 73% of all episodes released between 2015 and 2020 were cowritten by at least two screenwriters. More screenwriters were credited per episode for Spanish, Polish and Finnish TV fictions.

## About 3 200 directors involved in the production of TV fiction between 2015 and 2020

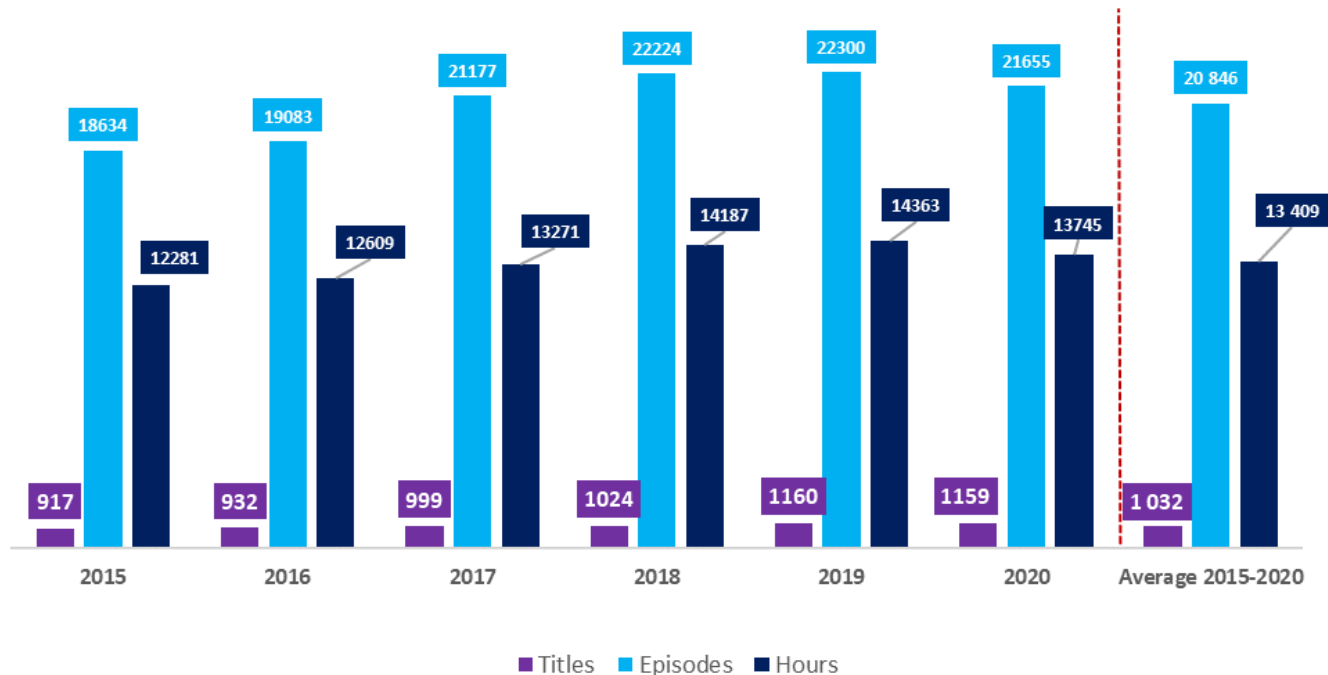
- ▶ Only 44%, though, were active in only one year between 2015 and 2020, and only 8% were credited for at least one episode during each of these six years.
- ▶ Excluding more than 52-episode-season series, a director, when active, (co)directed five episodes per year; but when considering all directors identified between 2015 and 2020, the figure falls to 1.7, as directors are, on average, far from being active each year.
- ▶ 44% of TV films and fiction series directors have also directed a theatrical film. The share is significantly higher for TV films (63%).

# Production volume and formats of European audiovisual fiction

## Over 1 000 titles, 20 000 episodes and 13 000 hours produced each year in Europe

- ▶ The volume of TV fiction titles increased between 2015 and 2020.
- ▶ In 2020, figures suggest a decrease of the production volume, mainly due to the interruption of the shooting of daily soaps and telenovelas.

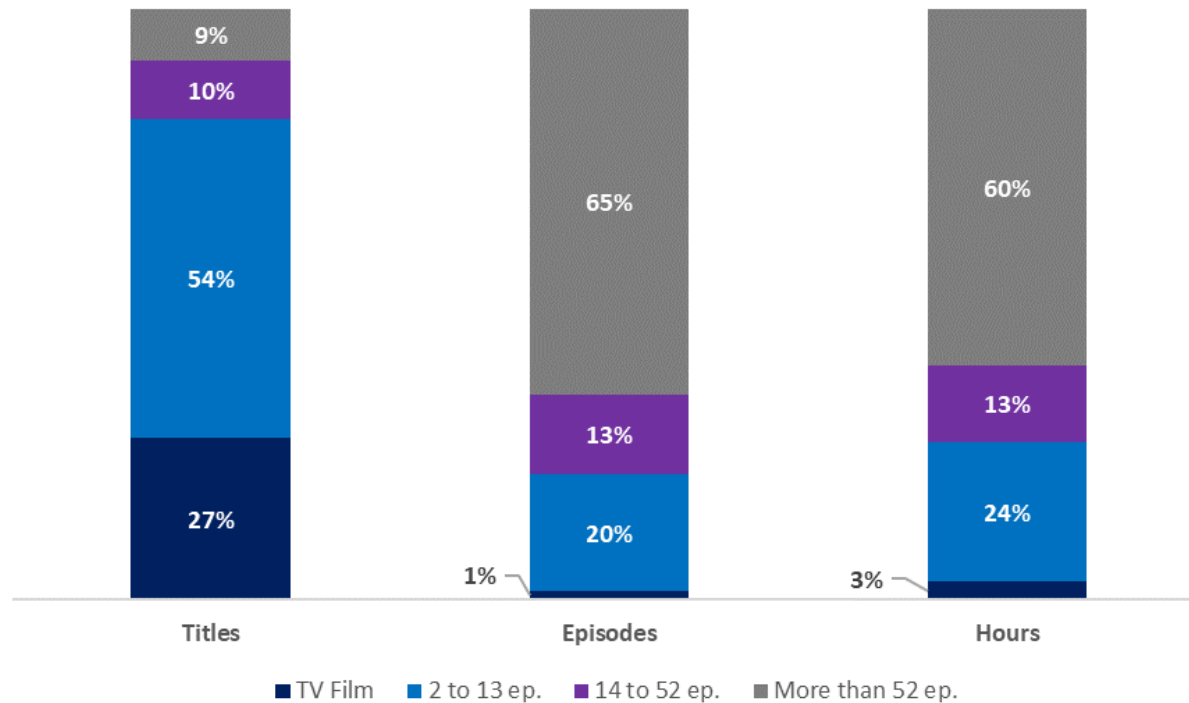
Volume of AV fiction produced in Europe (2015-2020)



## Daily soaps account for only 9% of titles, but for 60% of hours produced

- ▶ Conversely, TV films represent 27% of titles but only 3% of hours.
- ▶ 2-to-13-episode-per-season series account for 54% of titles and 24% of hours.

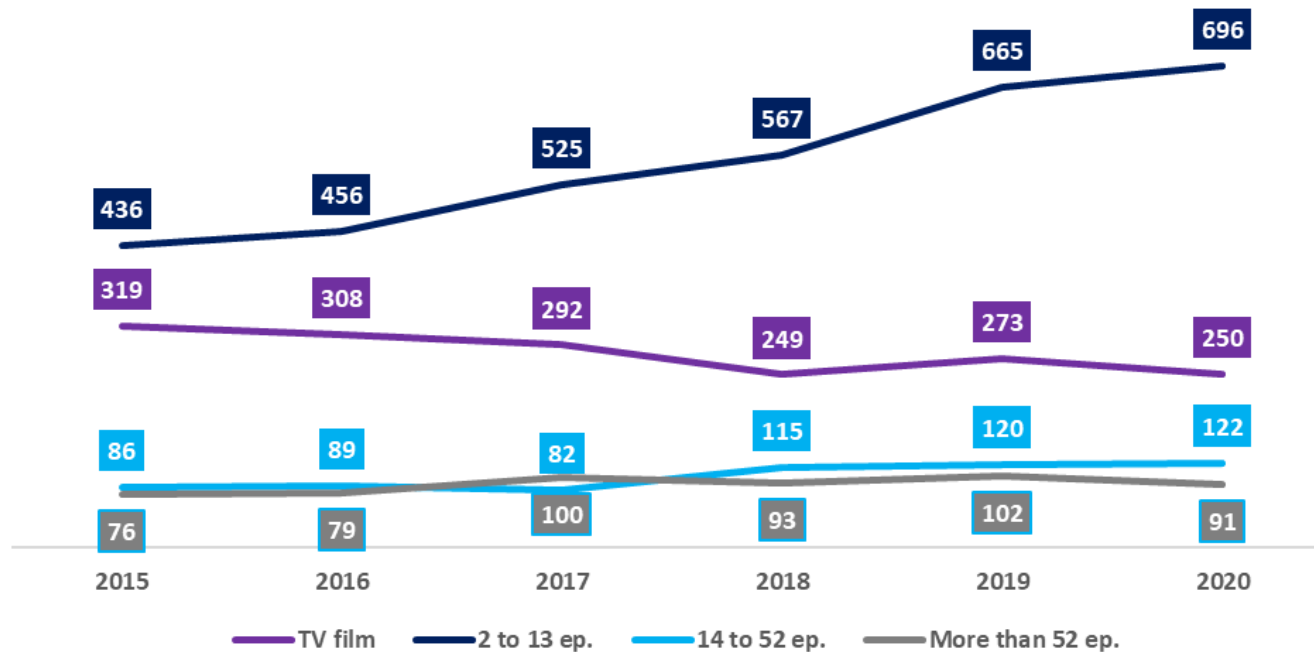
Number of fiction titles, episodes and hours produced (average 2015-2020)



## The number of 2-to-13-episode-per-season series has grown by 60% since 2015

- ▶ Almost three out of five TV titles produced in 2020 were 2-to-13-episode-per-season series.
- ▶ Despite the COVID-19 crisis, growth continued in 2020, although at a lower pace.
- ▶ Figures suggest a downward trend for TV films, maybe hinting at a substitution of the production of TV films by TV series.

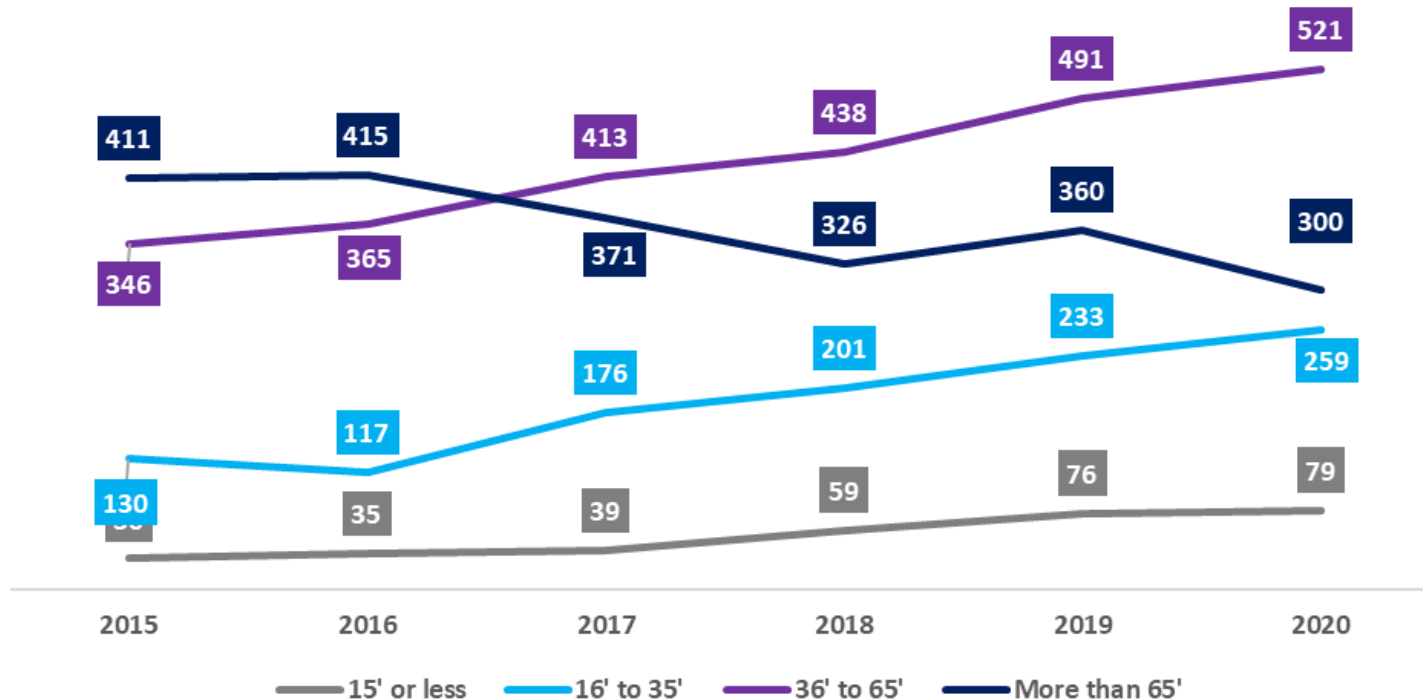
Number of AV fiction titles produced by format (2015-2020)



## The average duration of an episode of the vast majority of titles produced is higher than 36'

- ▶ Very short formats (15' or less) account for 7% of all titles produced but together with short formats (16' to 35') they are slowly growing in number and represented 30% of all titles in 2020.
- ▶ Longer episodes are decreasing due to a decrease in the number of TV films being produced and to the general shortening of episodes.

Number of fiction titles by duration of episodes (2015-2020)



## An average duration of 36' to 65' per episode for the majority of 2-to-26-episode seasons

- ▶ Daily soaps (more than 52 episodes per season) are split almost equally between half-hour and one-hour-long episodes.
- ▶ Seasons with either 6, 8 or 10 episodes account for 54% of all 2-to-13-episode seasons.

### Number of TV fiction titles produced by number and duration of episode (total 2015-2020)

Duration per episode/ episodes per season	TV Films	2 to 13	14 to 26	27 to 52	>52	Total
15' or less		182	97	38	317	
16' to 35'	41	683	156	236	1116	41
36' to 65'	87	1898	334	255	2574	87
More than 65'	1562	582	27	12	2183	1562
<b>Total</b>	<b>1690</b>	<b>3345</b>	<b>614</b>	<b>541</b>	<b>6190</b>	<b>1690</b>

Average number of episodes per 2 to 13 episodes season:

**7.3**

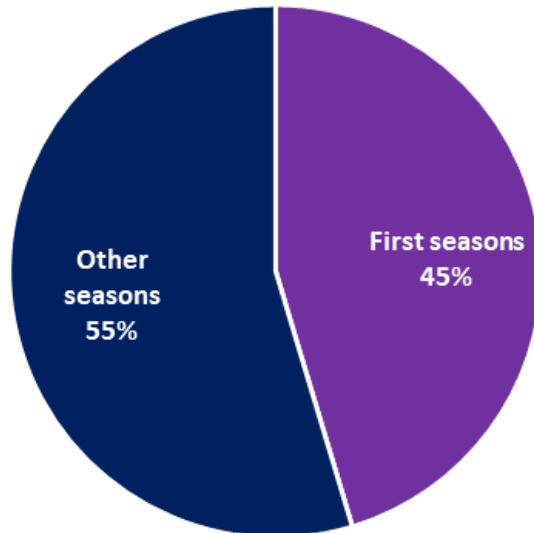
(and decreasing)



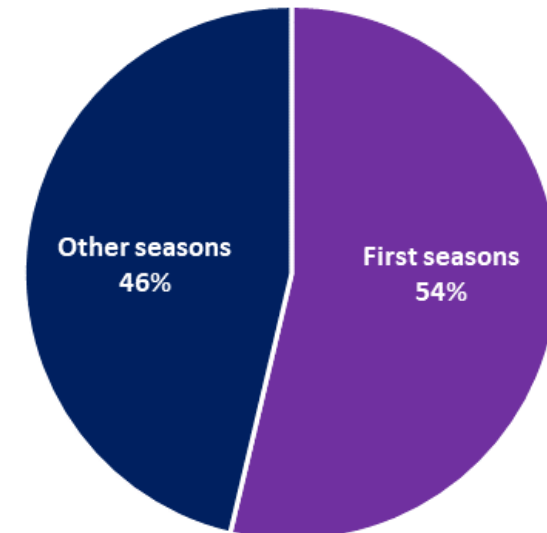
About 55% of series seasons are returning series (i.e. new seasons of existing programmes)

- ▶ The proportion of first seasons is higher (54%) for series with 2 to 13 episodes per season.

Share of first seasons among all series  
(average 2015-2020)



Share of first seasons among 2-to-13-episode series  
(average 2015-2020)

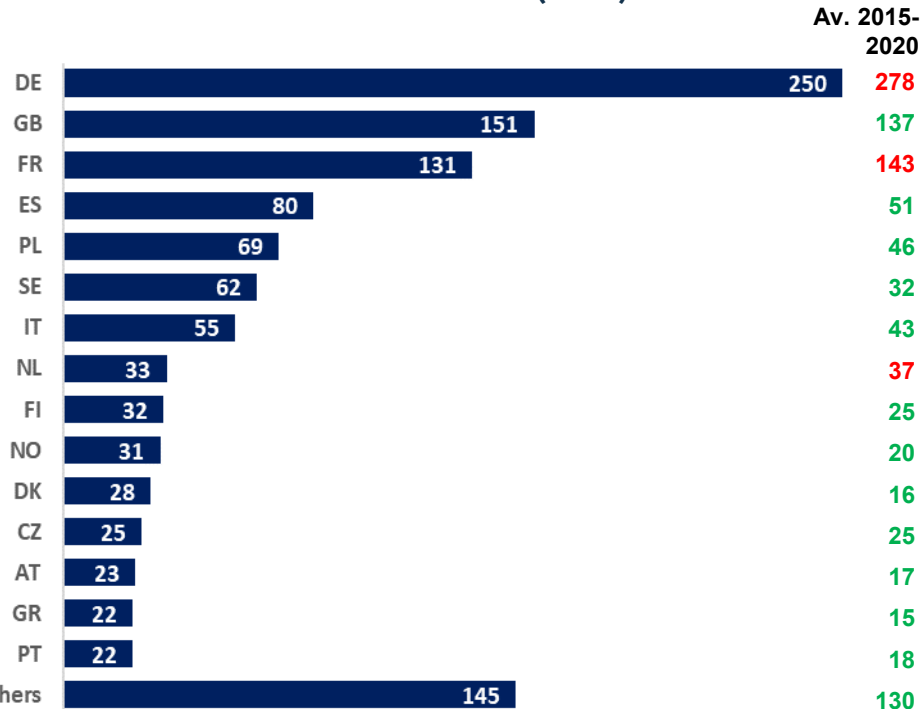


# Origin of European audiovisual fiction

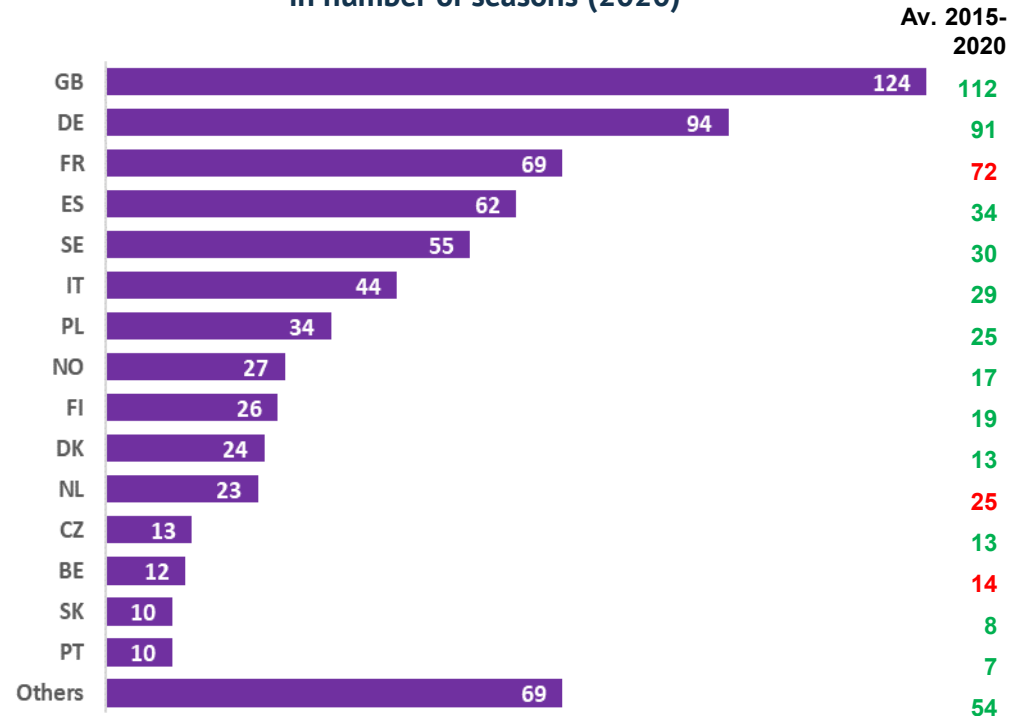
## Germany is the leading fiction production country in Europe in number of TV seasons and TV films produced

- ▶ The United Kingdom is the leading producer of 2-to-13-episode series.
- ▶ Figures suggest a 2-to-13-episode series production boom in Spain and in Scandinavian countries.

Top fiction producing countries in number of seasons (2020)



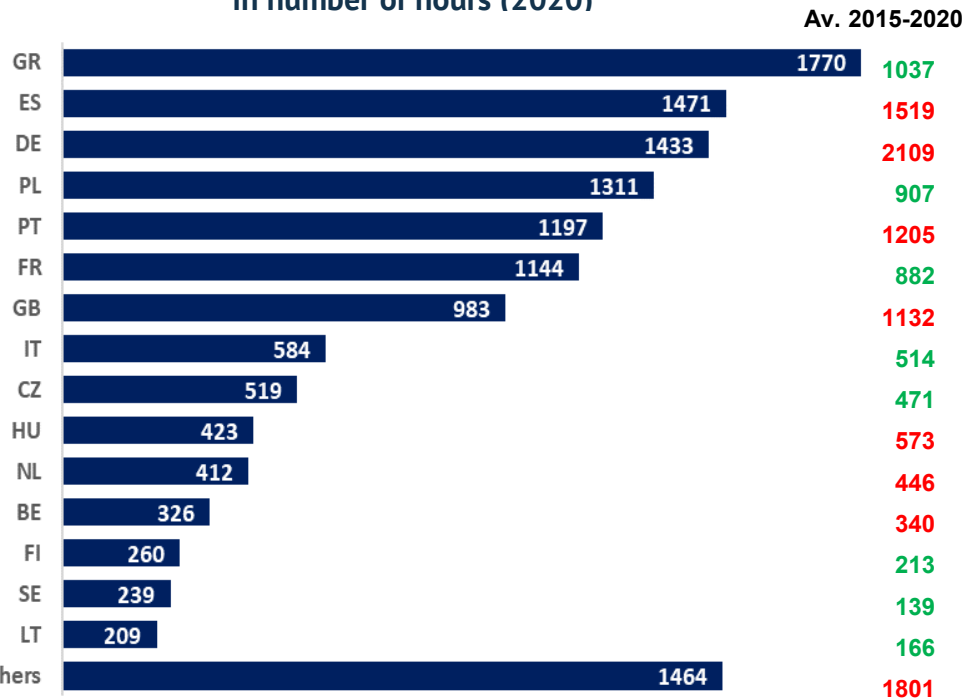
Top 2-to-13-episode series producing countries in number of seasons (2020)



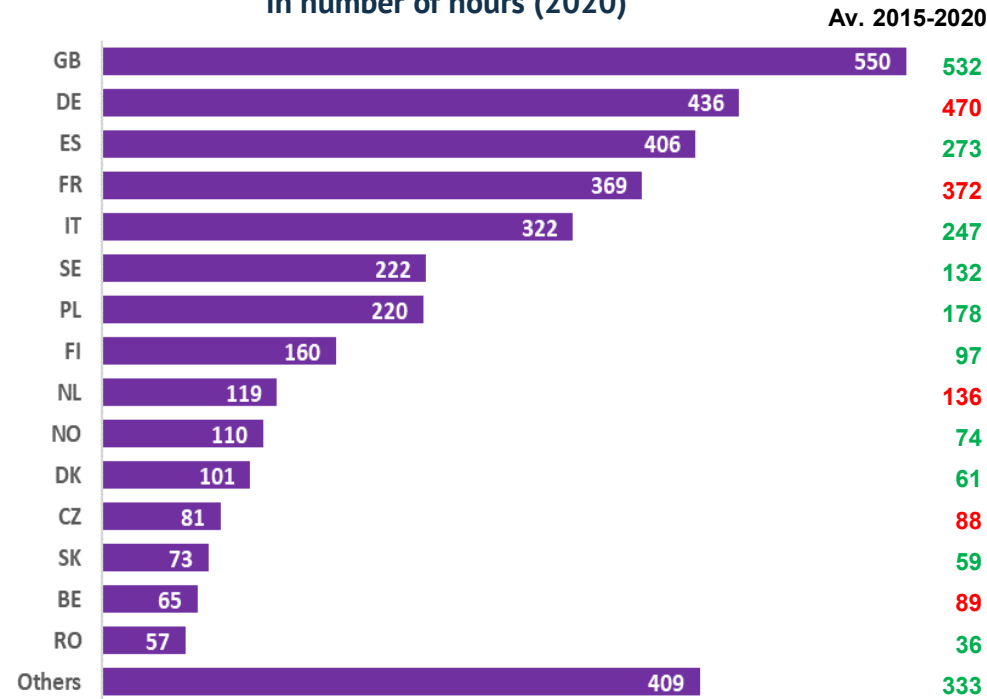
## In hours, Greece and Spain lead thanks to strong production of daily telenovelas / soaps

- ▶ Portugal, Poland, Hungary and the Czech Republic are also major producers of telenovelas and soaps.
- ▶ Many countries saw their production volume affected in 2020 by the interruption of telenovelas and soaps.
- ▶ But the production of 2-to-13-episode series appears to have been less affected by COVID-19.

Top fiction producing countries  
in number of hours (2020)



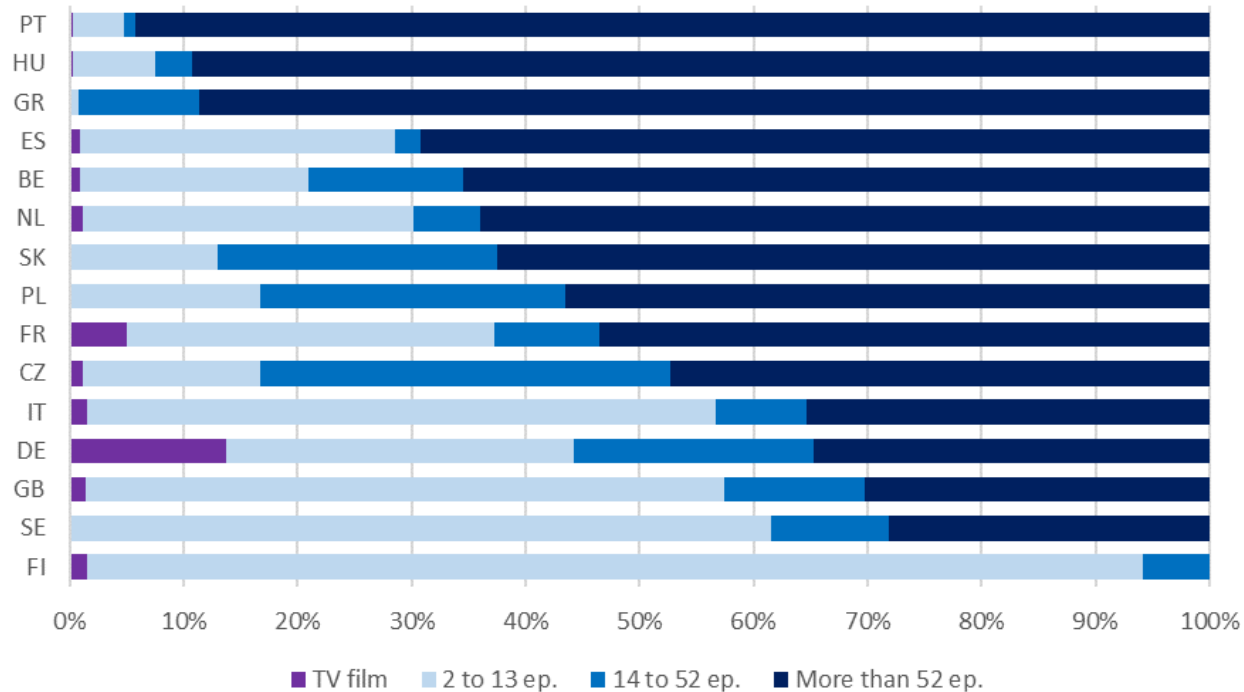
Top 2-to-13-episode series producing countries  
in number of hours (2020)



## The structure of fiction production varies between the leading countries

- ▶ Long-running soaps are dominant in Hungary, Portugal, Greece and Spain.
- ▶ Germany and France place a higher-than-average emphasis on TV films.
- ▶ Italy, France and the United Kingdom have a specific interest in 2-to-13-episode series.

Hours of fiction produced by country and format (top 10 producing countries)  
in % (2020)

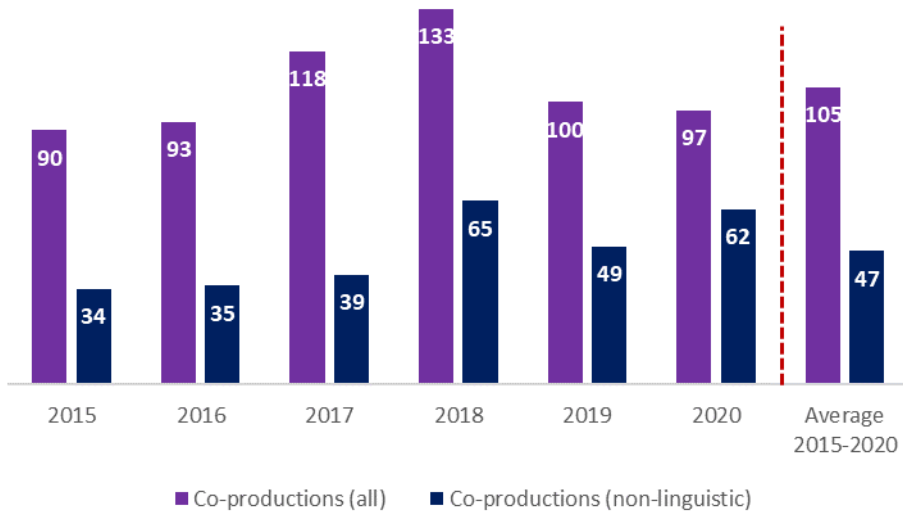


# International co-productions

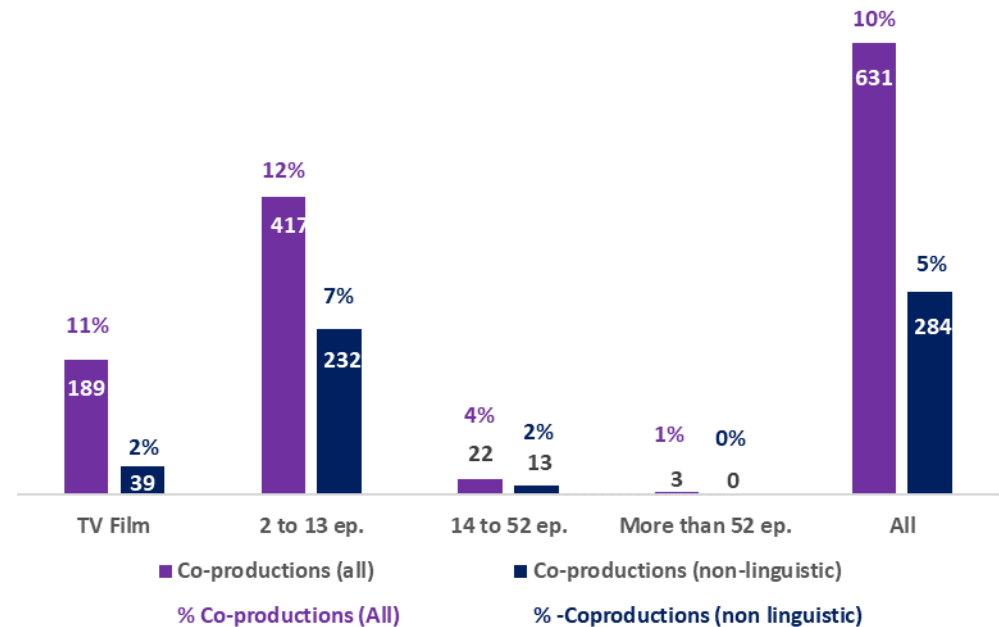
## About 100 co-productions per year, almost exclusively for TV films and 2-to-13-episode series

- Co-productions accounted for 12% of 2-to-13-episode series between 2015 and 2020, and 7% when excluding co-productions between neighbouring countries sharing the same language.

Number of co-productions (2015-2020)



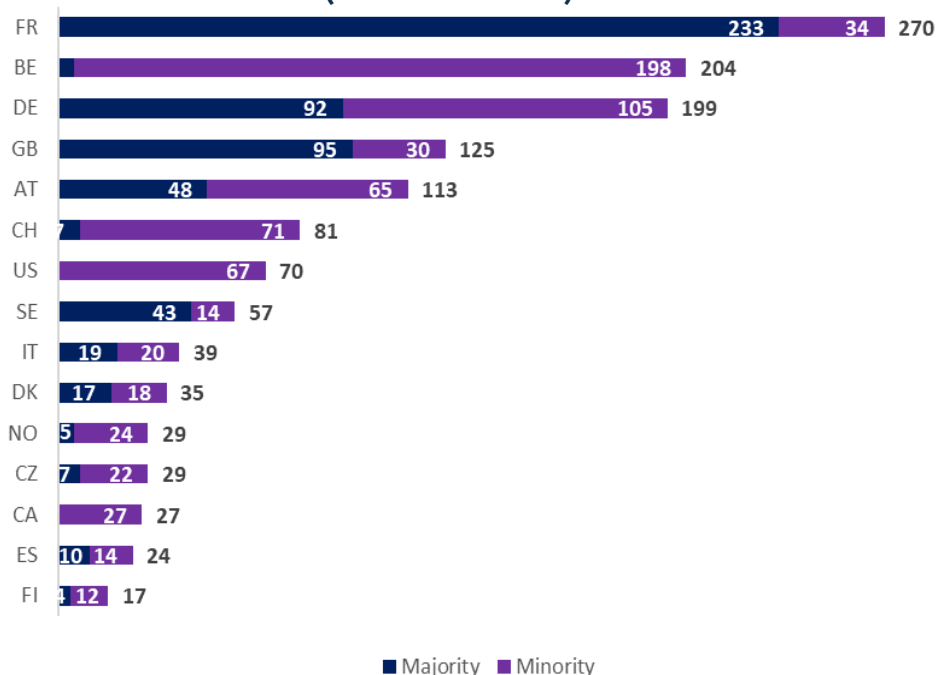
Number and share of co-productions by format (total 2015-2020)



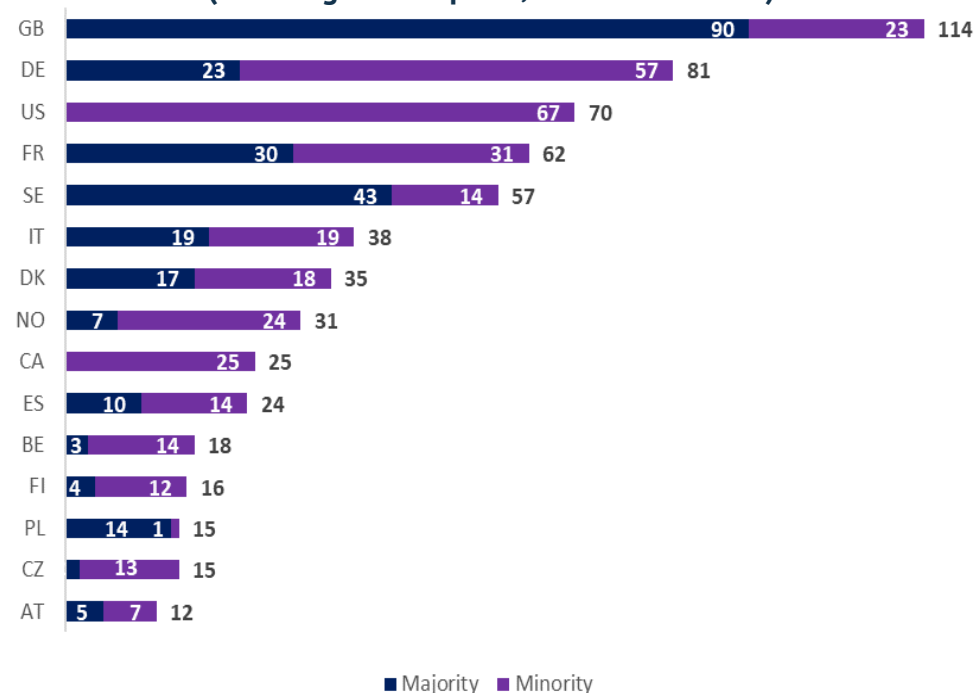
## France, Belgium and Germany are involved in the highest number of co-productions

- ▶ Belgium’s involvement is mainly as minority co-producer, in most cases with France.
- ▶ But, when excluding co-productions between neighbouring countries sharing the same language, the leaders are the United Kingdom, Germany, the United States (as minority co-producer), France and Sweden.
- ▶ The main co-production flows take place between the United Kingdom, the United States and Canada, and, to a lesser extent, France, and between Scandinavian countries. Germany is particularly active as a minority co-producer with Scandinavia. France often partners with Germany.

Number of participations in co-productions (total 2015-2020)



Number of participations in co-productions (excl. linguistic coprod., total 2015-2020)



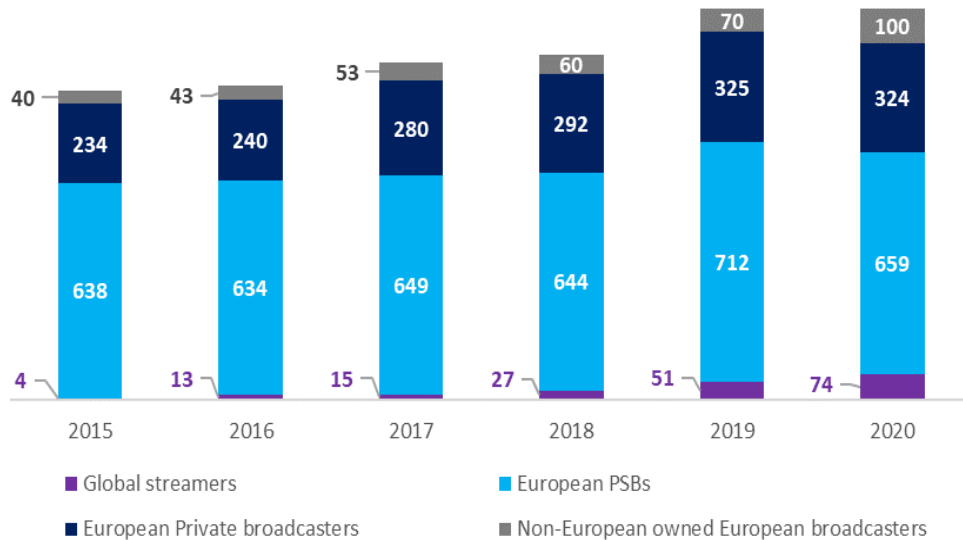


# Commissioners of European audiovisual fiction

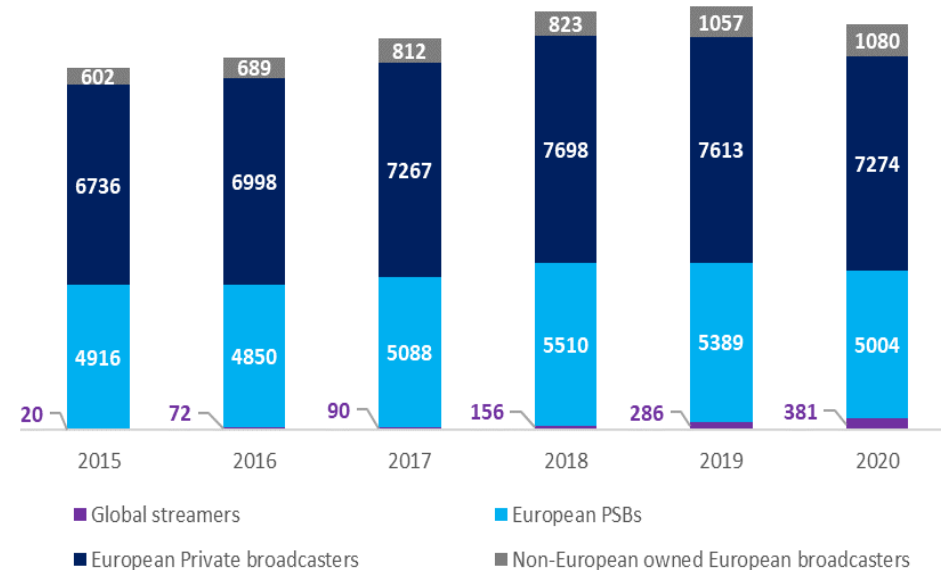
## Public service broadcasters commission 57% of titles and 36% of hours

- ▶ The number of titles commissioned by public and private European public service broadcasters sharply increased in 2020 and then decreased or stagnated in 2020, probably due to the COVID-19 crisis.
- ▶ Global streamers and US-based European broadcasters are increasingly investing in European fiction.

Fiction titles commissioned by category of players (2015-2020)



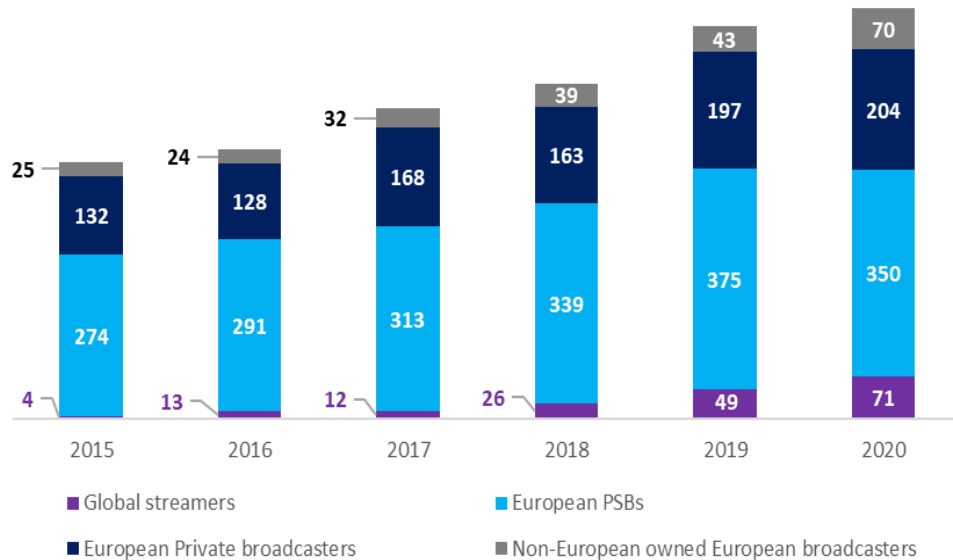
Fiction hours commissioned by category of players (2015-2020)



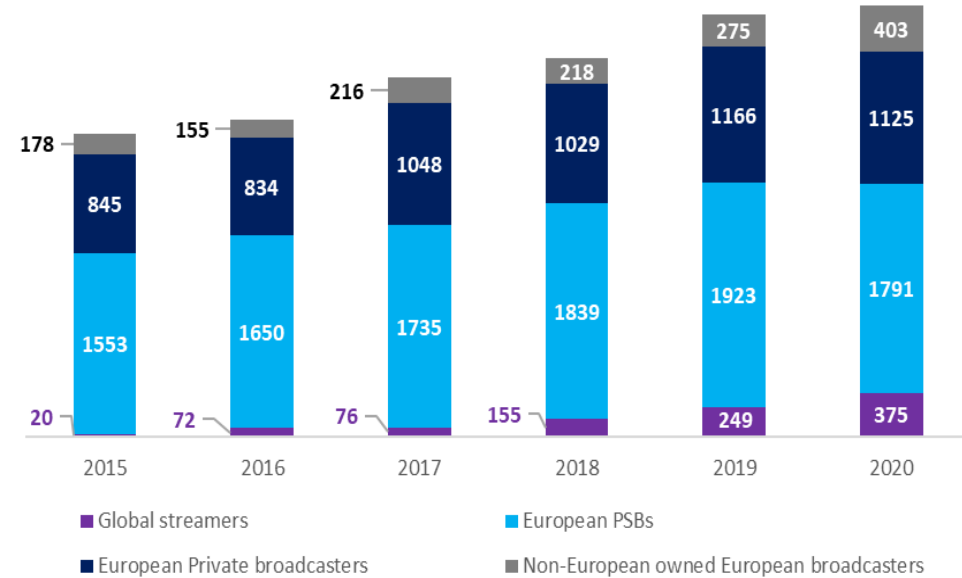
## Public broadcasters lead the commissioning of 2-to-13-episode series both in titles and in hours

- Public service broadcasters account for 50% of titles, private broadcasters for 39% and global streamers for 10%.

2-13-episode fiction titles commissioned by category of players (2015-2020)



2-13-episode fiction hours commissioned by category of players (2015-2020)



Source: European Audiovisual Observatory analysis of The European Metadata Group data

The BBC, Netflix, ARD, ZDF and France Télévisions led the commissioning of 2-to-13-episode series in 2020

## Top 20 commissioners of 2-13-episode fiction titles (2020)

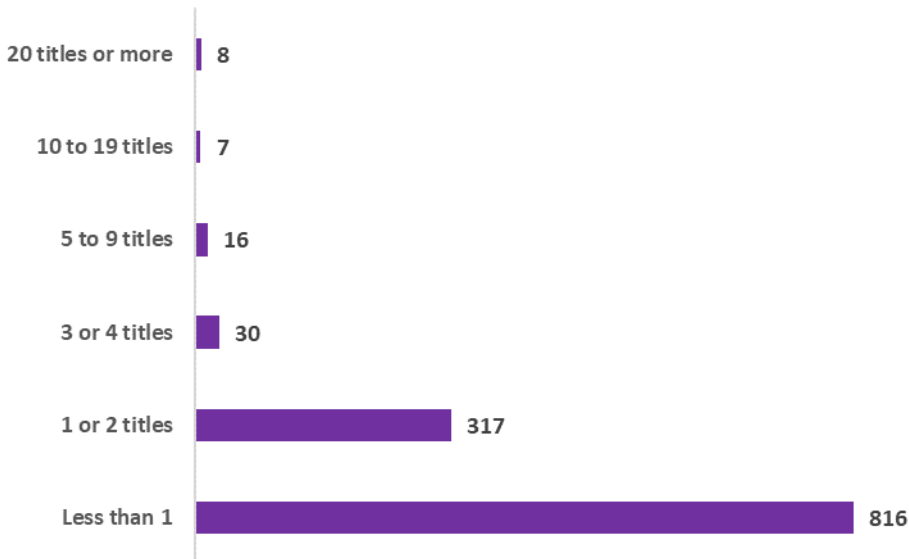
Rank	Group	Titles
1	BBC	61
2	Netflix	49
3	ARD	34
4	ZDF	32
5	France Télévisions	30
6	Comcast (Sky)	28
7	Telia Company	25
8	Sveriges Television (SVT)	22
9	ITV	22
10	Rai	21
11	NPO	20
12	Discovery	18
13	RTL Group	17
14	TF1	16
15	Amazon	13
16	Nent	13
17	TVP	12
18	Telefónica	12
19	NRK	11
20	Gruppo Mediaset	10

# Producers of European audiovisual fiction

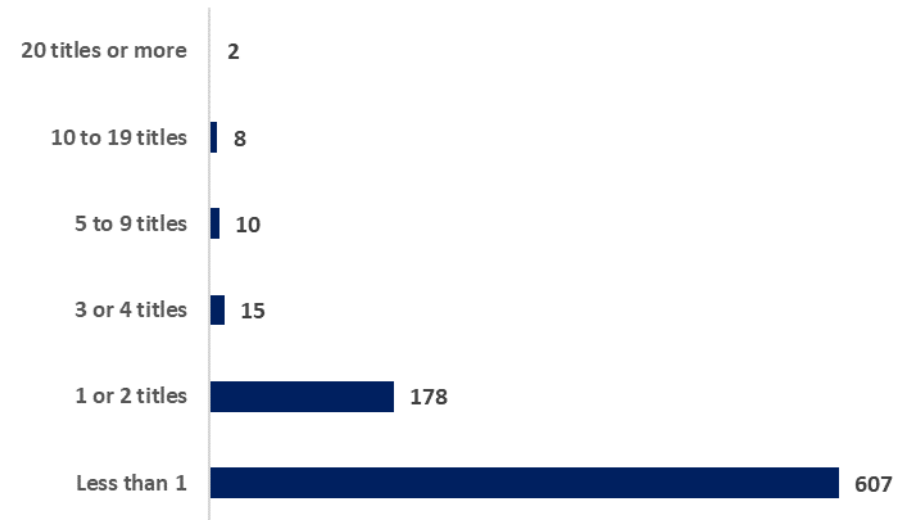
## Almost 1 200 production companies/groups produced at least 1 fiction title between 2015 and 2020

- ▶ 95% of companies produced only one or two titles in that period and only 7% of companies were active in each of the six years.
- ▶ About 850 production companies/groups engaged in the production of at least one 2-13-episode season between 2015 and 2020, but 96% of companies produced only one or two titles in that period.

Number of production companies/groups by average annual number of titles produced between 2015 and 2020



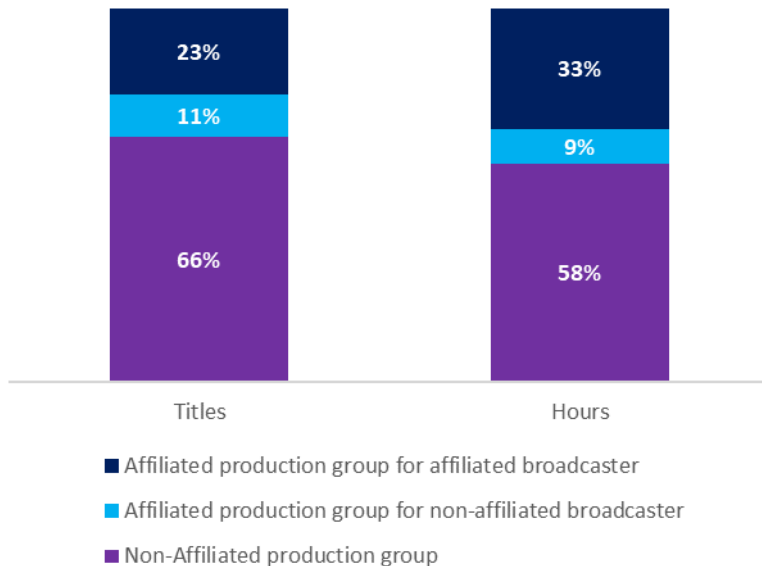
Number of production companies/groups by annual average number of 2-13-episode seasons produced between 2015 and 2020



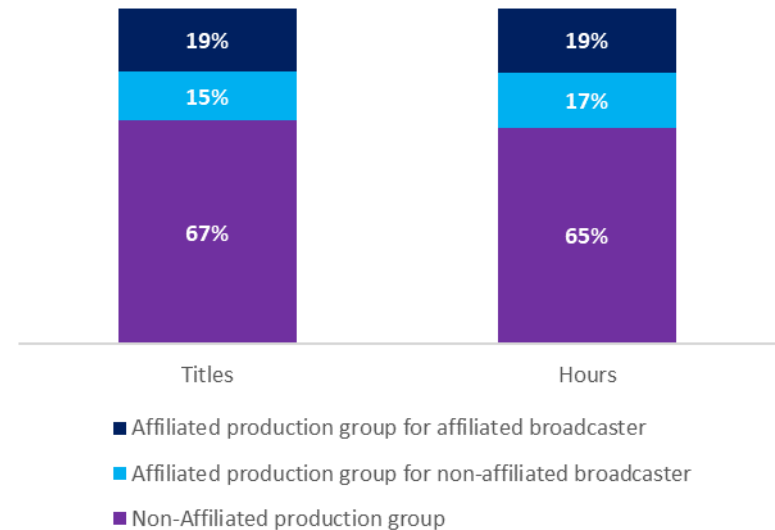
**Independent production includes production from production groups non-affiliated with a major broadcaster, and production affiliated with a major broadcaster – but producing for another broadcaster**

- ▶ Production by independent producers accounted for two-thirds of titles (both for all formats and for 2-to-13-episode series) and affiliated producers working for third-party broadcasters for 11% of and 15% of titles for all formats and for 2-to-13-episode series, respectively.
- ▶ Please note that the actual control of IP rights is not taken into account.

**Breakdown of production by category of producer  
(all fiction - 2020)**



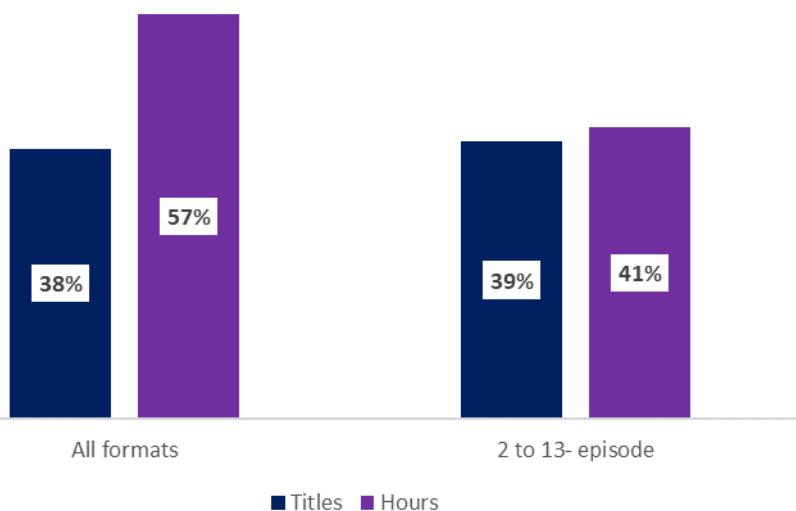
**Breakdown of production by category of producer  
(2 to 13 episode - 2020)**



## Top 20 producers account for close to 40% of titles

- ▶ Production of telenovelas/soaps is more concentrated in terms of hours produced (comparatively few titles, each comprising many hours).
- ▶ Mediawan/Leonine, Banijay and RTL group are the 3 main producers of independent TV fiction.

Share of the top 20 producers of total production for all formats and 2-to-13-episode series (2020)



Main production groups by average annual number of independent productions (2015-2020)

Rank	Group	Titles
1	Mediawan/Leonine	55
2	Banijay Group	47
3	RTL Group	30
4	ITV	21
5	Discovery Inc / John Malone	18
6	TF1	15
7	Highlight Communications	12
8	Warner Media	12
9	Vivendi	9
10	Asacha	8

Notes: productions for an affiliated broadcaster are not included; based on 2020 perimeter.

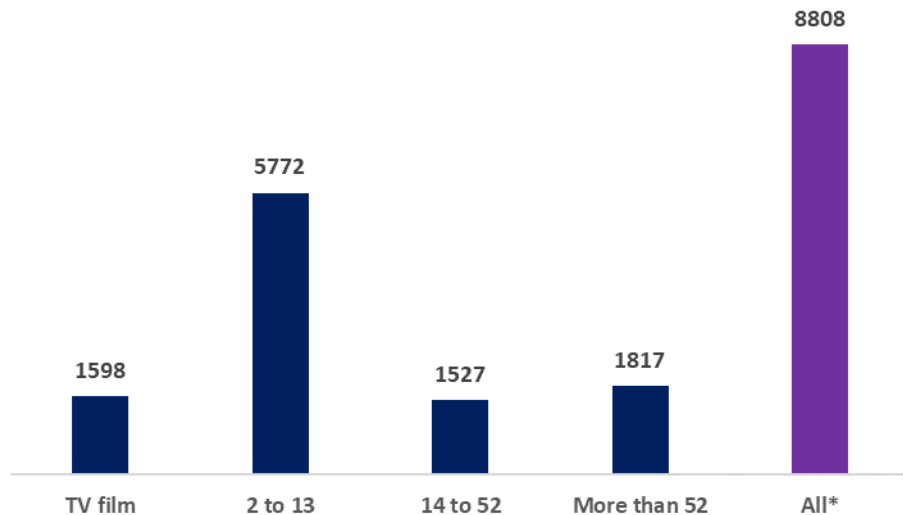


# Screenwriters and directors of European audiovisual fiction

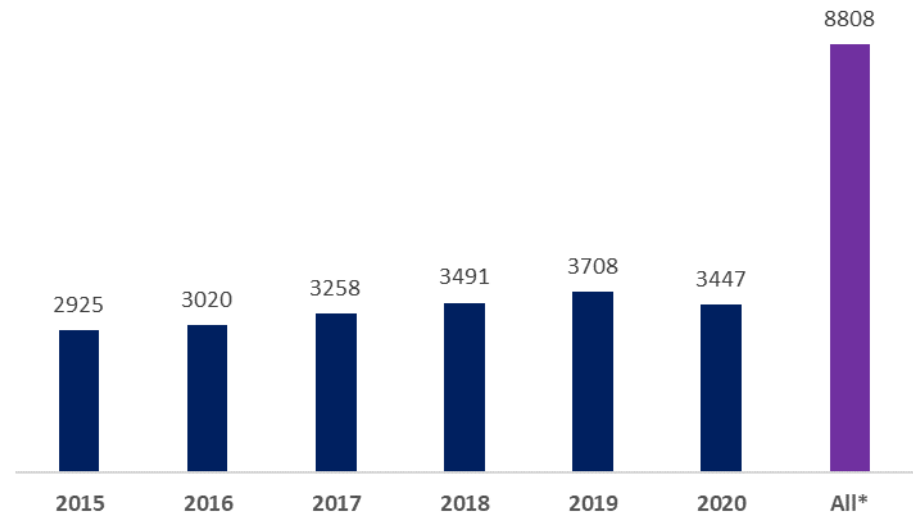
## At least one screenwriter was identified for 64% of all fiction episodes produced between 2015 and 2020

- ▶ The identification rate is much higher for TV films and 2-to-13-episode series (see details in [annex](#)).
- ▶ Over 8 800 different screenwriters wrote or co-wrote at least one fiction episode between 2015 and 2020. Extrapolating from the sample of identified names, the total number of screenwriters active in audiovisual fiction can be estimated at around 11 000.

Active screenwriters of AV fiction by format  
(2015-2020)



Active screenwriters of AV fiction by year  
(2015-2020)

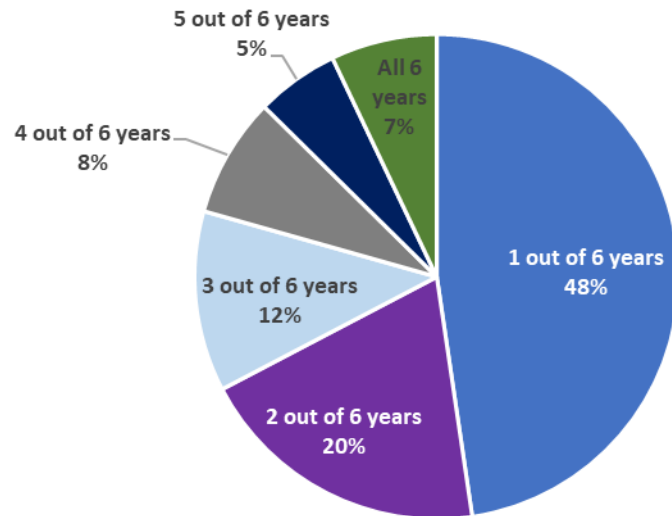


\* All: the figure is lower than the sum of each year or format as there are double-counts between years and between formats.

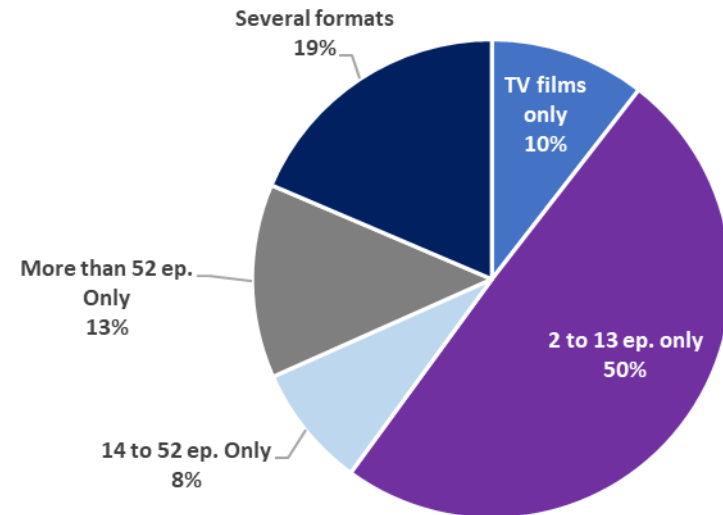
## 48% of identified screenwriters were active\* in only one year between 2015 and 2020

- ▶ Only 7% of screenwriters were credited for at least one episode during each of the six years.
- ▶ Screenwriters tend to be specialised by format: only 19% of them were credited for at least one episode of two or more different-format projects.

Screenwriters of AV fiction by number of years of activity between 2015 and 2020



Screenwriters of AV fiction active by formats (2015-2020)



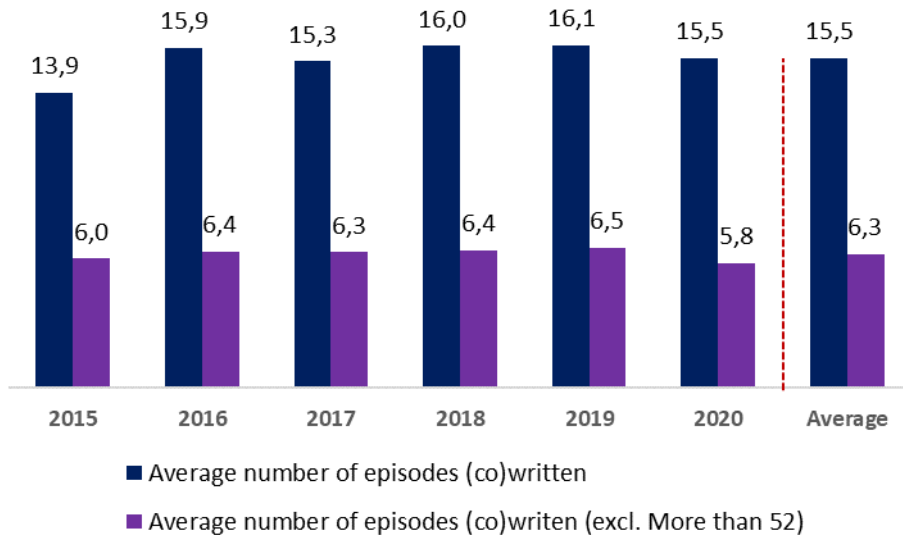
Source: European Audiovisual Observatory analysis of The European Metadata Group and IMDB data

\* active: credited for at least one episode released during the considered year.

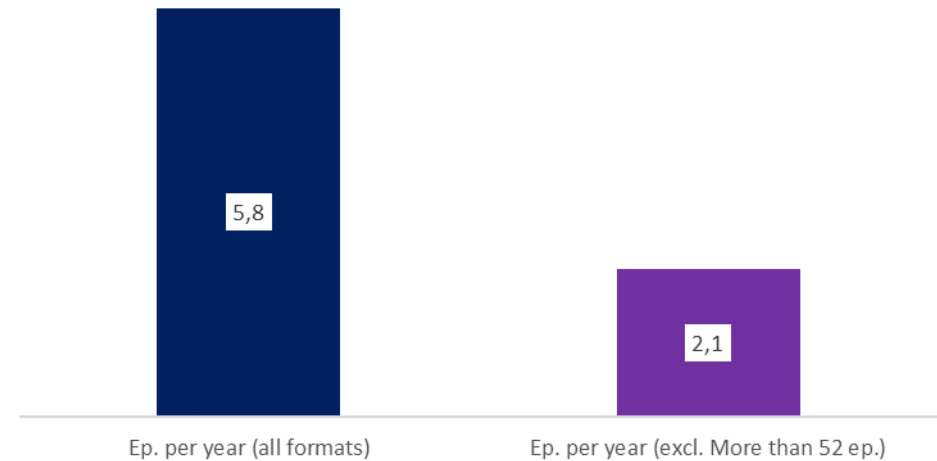
## On average, a screenwriter, when active\*, (co)wrote 15.5 episodes per year

- ▶ But, excluding more-than-52-episode series, the figure is only 6.3 episodes (co)directed per year, as few screenwriters write a significant share of long-running soaps.
- ▶ When considering all screenwriters active between 2015 and 2020, the average number of episodes (co)written falls to 5.8 and 2.1, as screenwriters are not active each year (see previous slide).

### Episodes (co)written per active screenwriter



### Average number of episodes (co)written per year between 2015 and 2020 by all active screenwriters



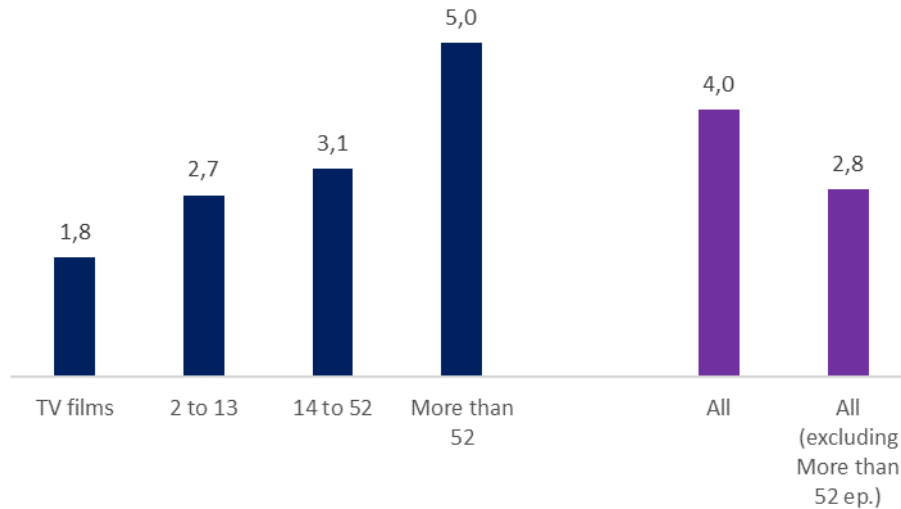
Source: European Audiovisual Observatory analysis of The European Metadata Group and IMDB data

\* active: credited for at least one episode released during the considered year.

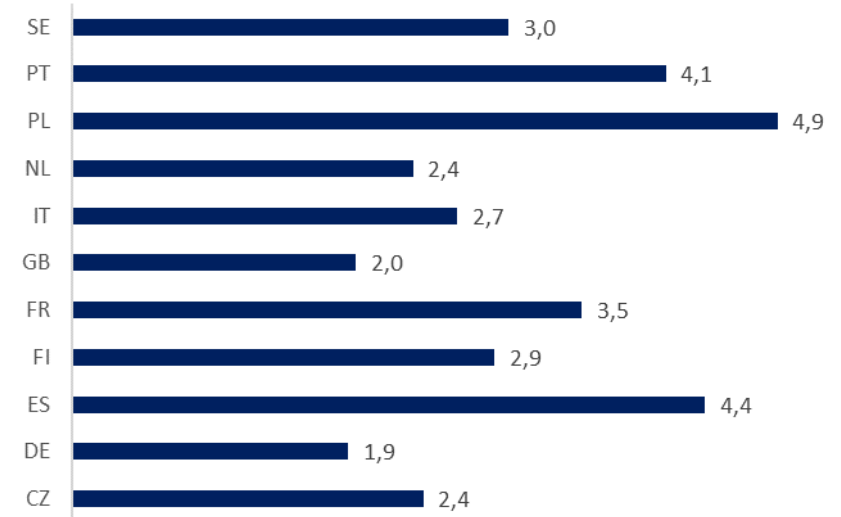
## 77% of all episodes released between 2015 and 2020 were co-written

- ▶ The average number of screenwriters per episode is 4 but 2.8 when excluding more-than-52-episode series.
- ▶ On average, there is about twice more co-writing in soaps (5 writers per episode) where all screenwriters are often credited for all episodes, than in other formats (2.8).
- ▶ More screenwriters are credited per episode for Polish, Spanish, and Portuguese TV fictions.

Number of screenwriters per episode and by format (2015-2020)



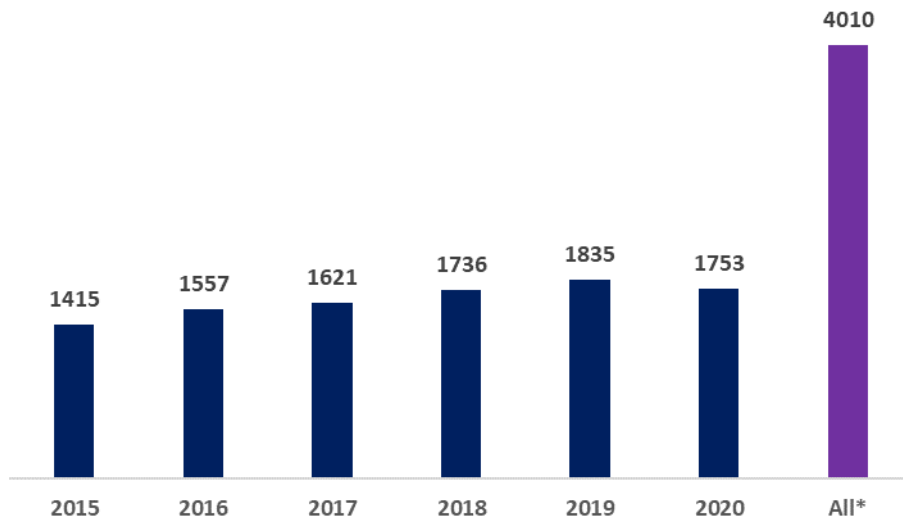
Number of writers per episode in selected country of production (excl. more-than-52-episode series, 2015-2020)



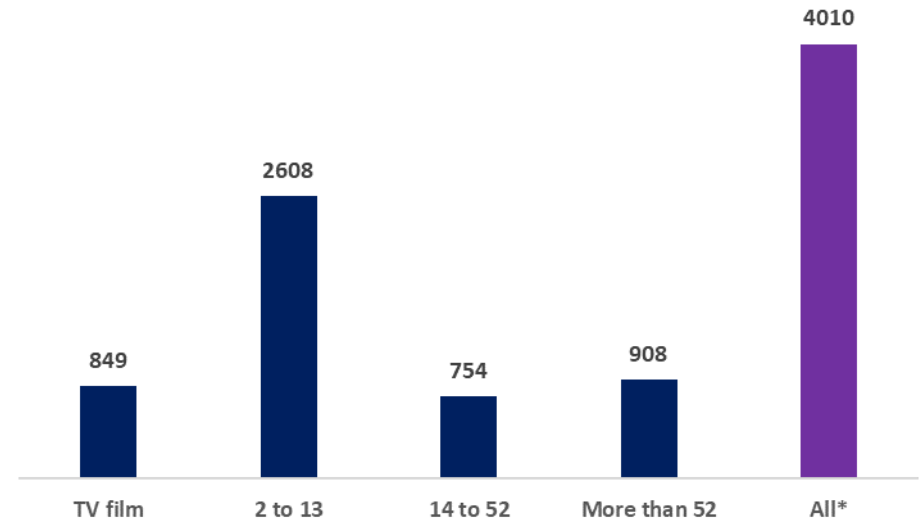
## At least one director was identified for 67% of all fiction episodes produced between 2015 and 2020

- ▶ The identification rate is much higher for TV films and 2-to-13-episode series (see details in [annex](#)).
- ▶ About 4 000 different directors directed or co-directed at least one fiction episode between 2015 and 2020. Extrapolating from the sample, the total number of directors active in audiovisual fiction can be estimated at around 5 000.

Active directors of AV fiction by format (2015-2020)



Active directors of AV fiction by year (Total 2015-2020)

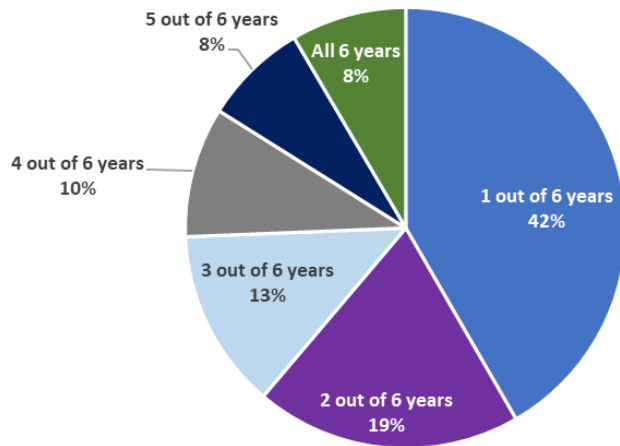


\* All: the figure is lower than the sum of each year or format as there are double-counts between years and between formats

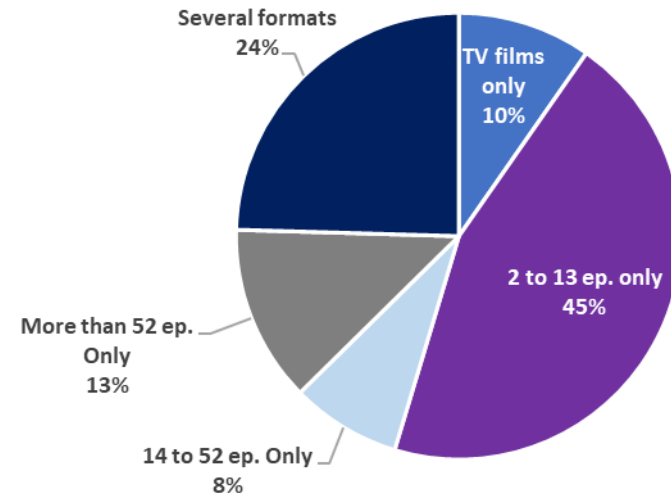
## 42% of identified directors were active\* in only one year between 2015 and 2020

- ▶ Only 8% of directors were credited for at least one episode during each of the six years.
- ▶ Like screenwriters, directors tend to be specialised by format: only 24% of them were credited for at least one episode of two or more different-format projects.

Directors of AV fiction by number of years of activity between 2015 and 2020



Directors of AV fiction active by formats (2015-2020)



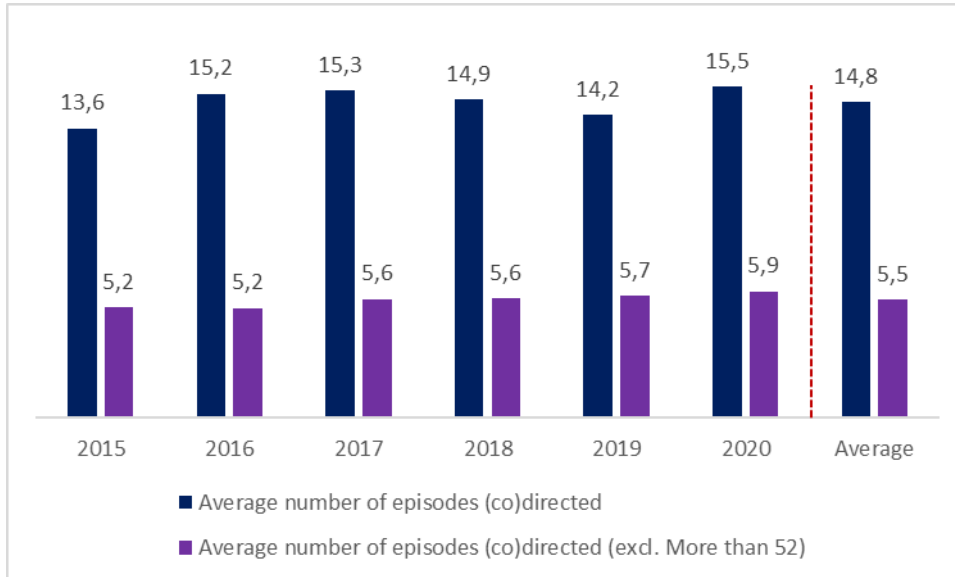
Source: European Audiovisual Observatory analysis of The European Metadata Group and IMDB data

\* active: credited for at least one episode released during the considered year.

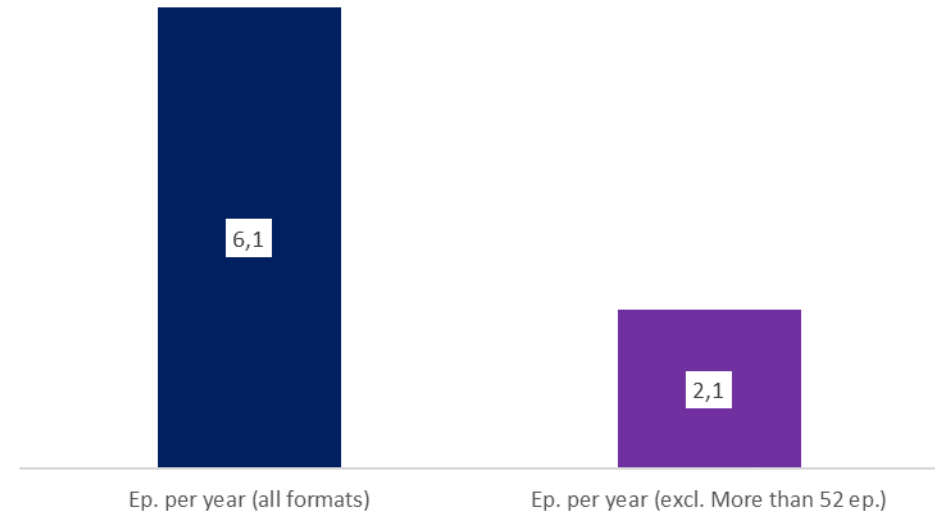
## On average, a director, when active, (co)directed 14.8 episodes per year

- ▶ But, excluding series with more than 52 episodes, the figure is only 5.5 episodes (co)directed per year, as few directors direct a significant share of long-running soaps.
- ▶ When considering all directors active between 2015 and 2020, the average number of episodes (co)written falls to 6.1 and 2.1, as directors are not active each year (see previous slide).

Episodes (co)directed per active director  
(2015-2020)



Average number of episodes (co)directed per year  
between 2015 and 2020 by all active directors

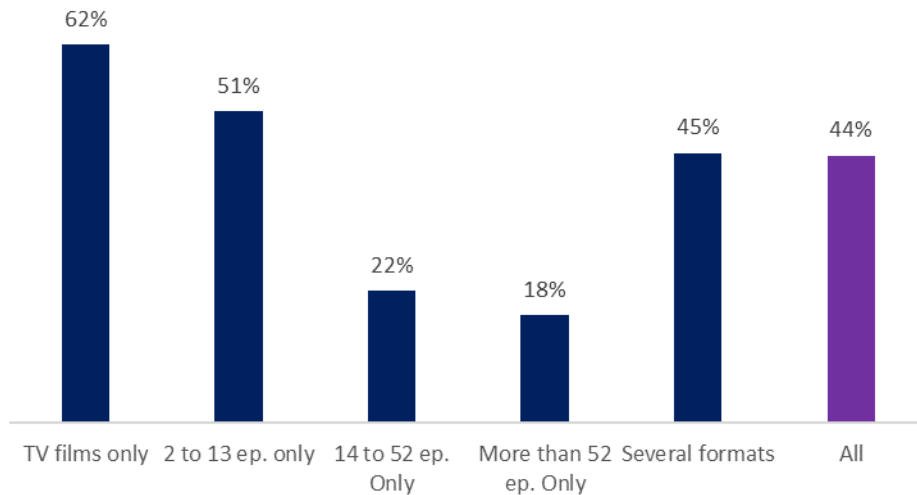




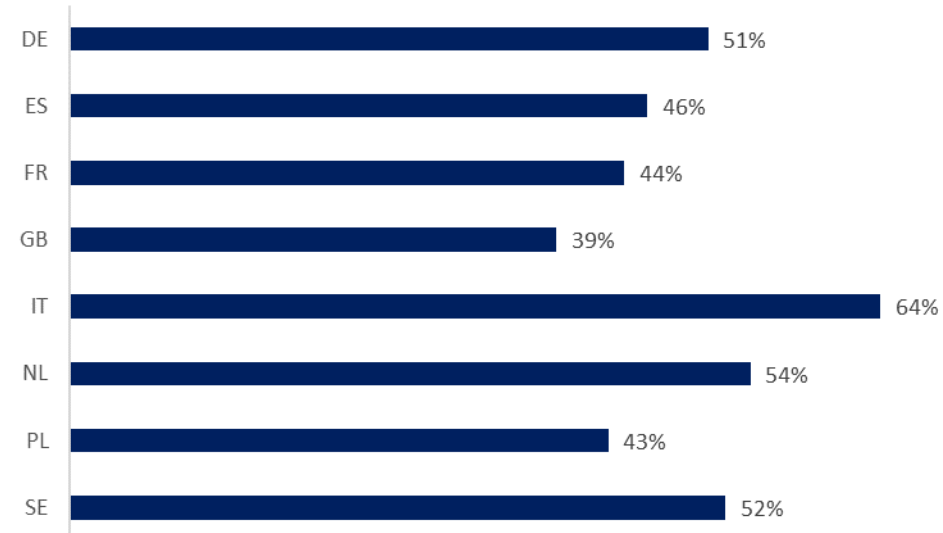
## 44% of TV films and fiction series directors have also directed a theatrical film

- ▶ The share is significantly higher for directors of TV films (62%).
- ▶ It also significantly varies between countries of production: from 39% in the UK to 64% in Italy.

Share of 2015-2020 directors of AV fiction present in the LUMIERE database by format



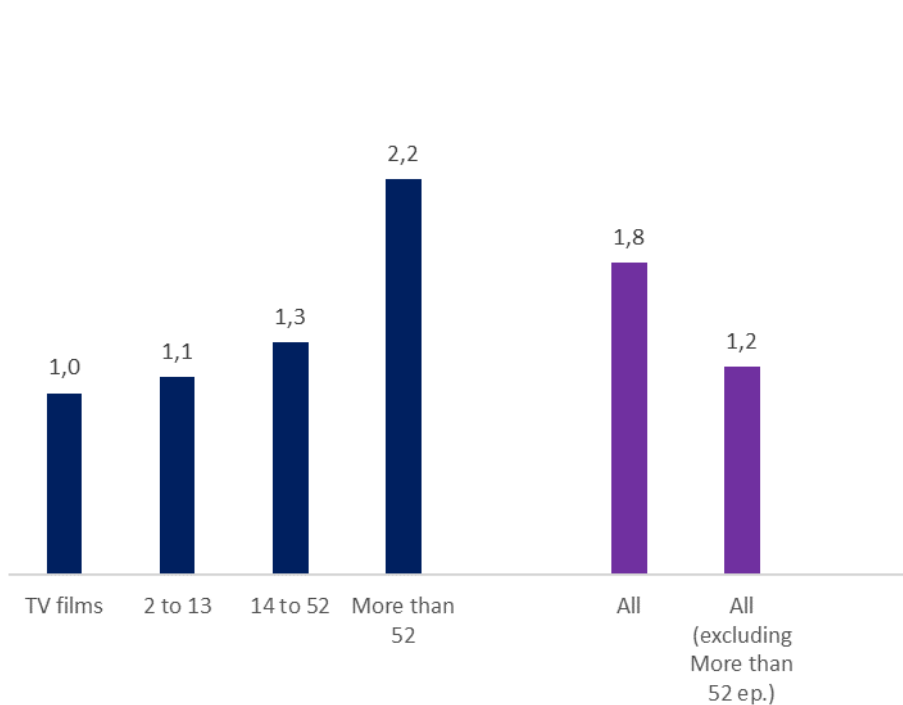
Share of 2015-20120 directors of AV fiction present in the LUMIERE database in selected countries



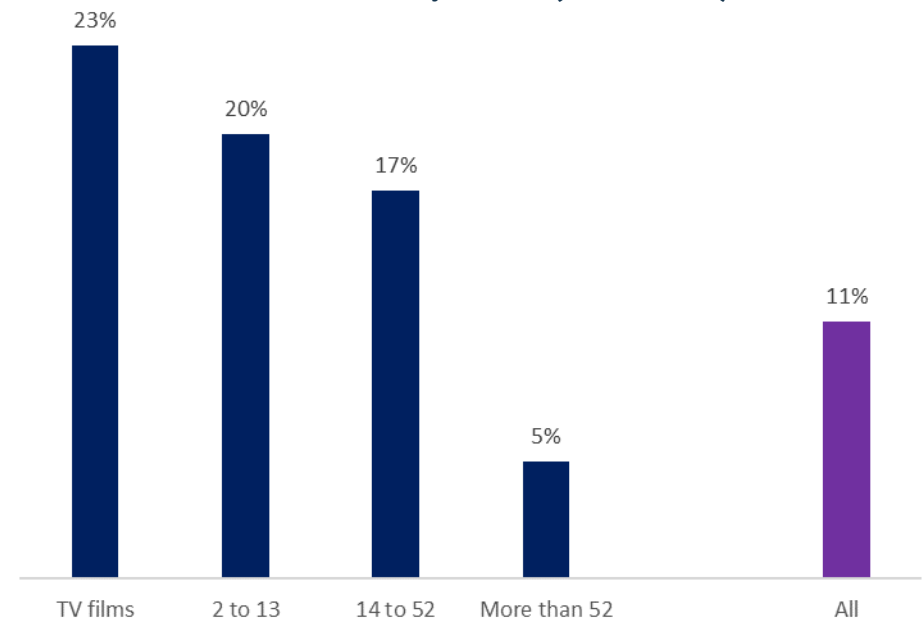
## 33% of all episodes released between 2015 and 2020 were co-directed

- ▶ The average number of directors per episode is 1.8, but 1.2 when excluding more-than-52-episode series.
- ▶ Directors are also credited as screenwriters (or as one of the screenwriters) for 23% of TV films and 20% of episodes of 2-to-13-episode series.

Number of directors per episode and by format (2015-2020)



Share of episodes with at least one director also credited as screenwriter, by format (2015-2020)



# Annexes

## Strong variations by format in the identification of screenwriters and directors

- ▶ At least one screenwriter and one director was identified for 64% and 70 % of all fiction episodes produced between 2015 and 2020, respectively.
- ▶ The identification rate is significantly lower for series with more than 13 episodes.

### Share of episodes with at least one scriptwriter identified

Identification rate of episodes	2015	2016	2017	2018	2019	2020	All
TV film	66%	67%	80%	88%	96%	77%	<b>77%</b>
2 to 13	92%	98%	101%	100%	95%	70%	<b>91%</b>
14 to 52	77%	86%	86%	74%	73%	56%	<b>74%</b>
More than 52	51%	61%	51%	47%	58%	54%	<b>53%</b>
<b>Grand Total</b>	<b>61%</b>	<b>71%</b>	<b>64%</b>	<b>61%</b>	<b>70%</b>	<b>59%</b>	<b>64%</b>

### Share of episodes with at least one director identified

Identification rate of episodes	2015	2016	2017	2018	2019	2020	All
TV film	75%	75%	87%	102%	109%	82%	<b>87%</b>
2 to 13	100%	102%	109%	106%	99%	84%	<b>99%</b>
14 to 52	81%	87%	88%	74%	70%	66%	<b>76%</b>
More than 52	51%	64%	57%	59%	69%	59%	<b>60%</b>
<b>Grand Total</b>	<b>64%</b>	<b>74%</b>	<b>70%</b>	<b>70%</b>	<b>77%</b>	<b>67%</b>	<b>70%</b>

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