



Audiovisual fiction production in Europe 2022 figures

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Introduction and methodology

This report provides an analysis of the production of audiovisual fiction in Europe in the period 2015-2022(*). 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 were 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 Observatory 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, Norway, Switzerland and Iceland

- Titles have been broken down by **format**: TV films/collections, series with 13-episodes-or-less-per-season, series with 14-to-52-episodes-per-season, and series with more-than-52-episodes-per-season. A limited number of TV films have two episodes; they are nevertheless considered as TV films. Some TV films belong to **collections** (e.g. Germany's "Tatort" or France's "Meutres 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). Some data in the previous editions of this report have been restated, as we have converted TV series into collections.
- 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 programme 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 programme 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 and Iceland.

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Key findings

The production and release of original TV fiction resumed growth in 2022 after a halt during the COVID-19 crisis.

- However, the recovery of the market was not evenly spread. The number of fiction titles produced in 2022 grew by 12%, but the volume of hours and number of episodes stagnated when compared to 2021.
- The growth of series with 13-episodes-or-less-per-season was unaffected throughout the crisis, but did not translate into a notable growth of volume of hours, as seasons had fewer and shorter episodes (probably as a way to cope with production costs and inflation).
- The production of TV films continued its recovery in 2022 after several years of decline.

Some of the fundamental characteristics of TV production in Europe remained uninterrupted by COVID-19.

- Telenovelas/soaps accounted for the bulk (60%) of hours produced.
- More than half of all titles produced were series with 13-episodes-or-less-per-season.

The production mix varied considerably between countries.

- With large volumes of telenovelas/soaps produced each year, Germany, Poland and Greece were the leaders in volume of hours produced. Portugal and Hungary are two other examples of countries driven by series with more-than-52-episodes-per-season.
- Germany produced the highest number of different titles, with a higher-than-average focus on TV films.
- When focusing on shorter seasons (13 episodes or less), the UK was by far the main producer, ahead of Germany, France, Spain and Sweden.
- In 2022, most fiction titles commissioned by global streamers were produced in Spain (34) and the United Kingdom (32). Other significant production hubs for streamers were the Nordic countries and France (2015-2022).

More international non-linguistic co-productions.

- International co-productions accounted for 7% of all fiction titles and were mostly limited to TV films and series with 13-episodes-or-less-per-season.
- 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 have gradually increased and represented over 50% of all co-productions in 2022.
- Non-linguistic co-productions were driven by: the United Kingdom (mainly as a majority co-producer, often with the United States but also with France and Canada), Germany (often as a minority co-producer and in many instances with Scandinavian countries) and projects between two or more Scandinavian countries. Spain, despite the recent production boom, had relatively few co-productions, maybe because of the weight of global streamers in new fiction projects (Spain ranks first – together with the United Kingdom – in number of fiction projects commissioned by global streamers).

Public broadcasters commissioned 55% of titles and 39% of hours.

- Well over half of fiction titles produced in Europe in 2022 were commissioned by public service broadcasters (55%), followed by private broadcasters (32%) and global streamers (12%). Due to their bigger share in daily soaps and telenovelas, private broadcasters produced a higher volume of hours (58%) than public service broadcasters (39%). Global streamers accounted for 3% of hours, as they do not invest in long-running TV series.
- With a noticeable boost in investment, global streamers released 186 original European fiction titles in 2022 (all formats), vs. 137 in 2021. Four out of five of these were commissioned by Netflix (62%) and Amazon (20%).
- BBC, Netflix and ZDF were the three main commissioners of series with 13-episodes-or-less-per-season.

Production groups: Huge turnover, 3 groups lead.

- Almost 1 800 production companies/groups produced at least one fiction title between 2015 and 2022, but only 4% of them produced at least one title in each of the last eight years. This significant turnover can be attributed to the intense renewal of TV series: on average, between 2015 and 2022, first seasons accounted for just over half of all seasons produced each year.
- In 2022, independent productions accounted for 84% of all titles produced, with 13% from production groups affiliated with a broadcaster but working for a third-party broadcaster. The share of dependent productions was 16%*.
- The Banijay Group, the RTL Group and the Mediawan - Leonine Alliance were the three main producers of independent TV fiction.

About 15 000 screenwriters involved in the production of TV fiction between 2015 and 2022.

- 66%, though, were active for only one or two years between 2015 and 2022.
- On average, excluding series with more-than-52-episodes-per-season, a screenwriter (co)wrote 1.8 episodes per year.
- On average, a TV series involved five screenwriters.
- 72% of all episodes released between 2015 and 2021 were cowritten by at least two screenwriters. More screenwriters were credited per episode for Portuguese, Polish and Spanish fiction.

* Please see the definition of an “independent production” in the [methodology section](#).

About 7 000 directors were involved in the production of TV fiction between 2015 and 2022.

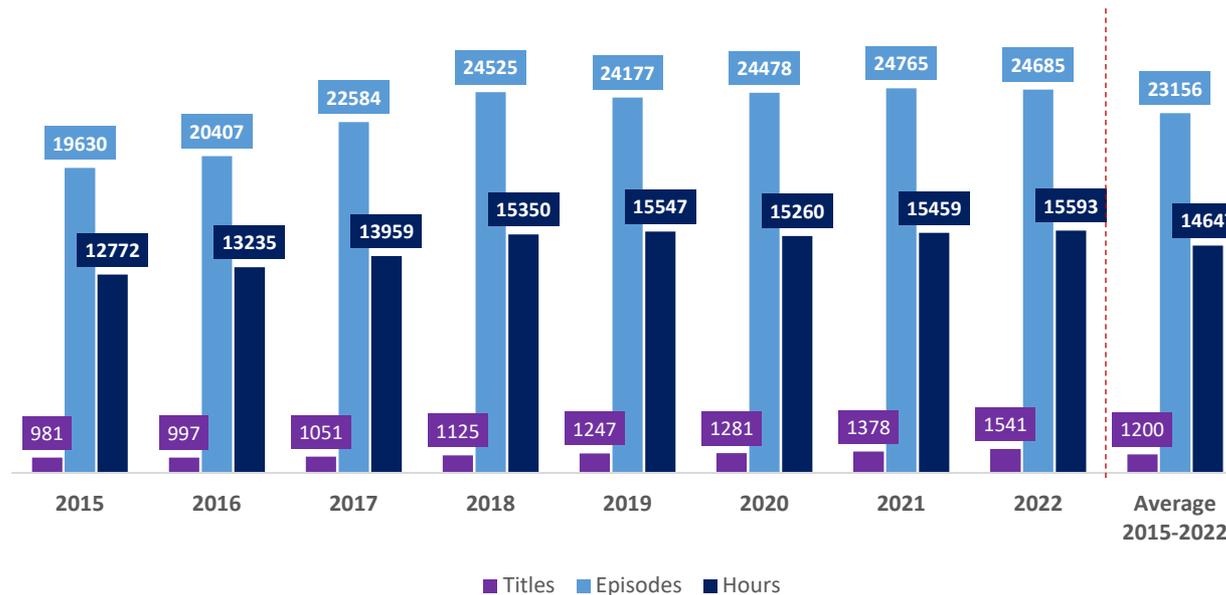
- 61%, though, were active for only one or two years between 2015 and 2022.
- On average, a TV series involved 2.9 directors.
- Excluding series with more-than-52-episodes-per-season, a director (co)directed 1.8 episodes per year.
- 59% of TV films and fiction series directors have also directed a theatrical film at any given point in time.
- Directors were also credited as screenwriters (or as one of the screenwriters) for 27% of TV films and 25% of series with 13-episodes-or-less-per-season.

Production volume and formats of European audiovisual fiction

Over 1 200 titles, 23 000 episodes and 14 000 hours produced each year in Europe.

- The volume of TV fiction titles increased between 2015 and 2022.
- But volumes in hours are stagnating.

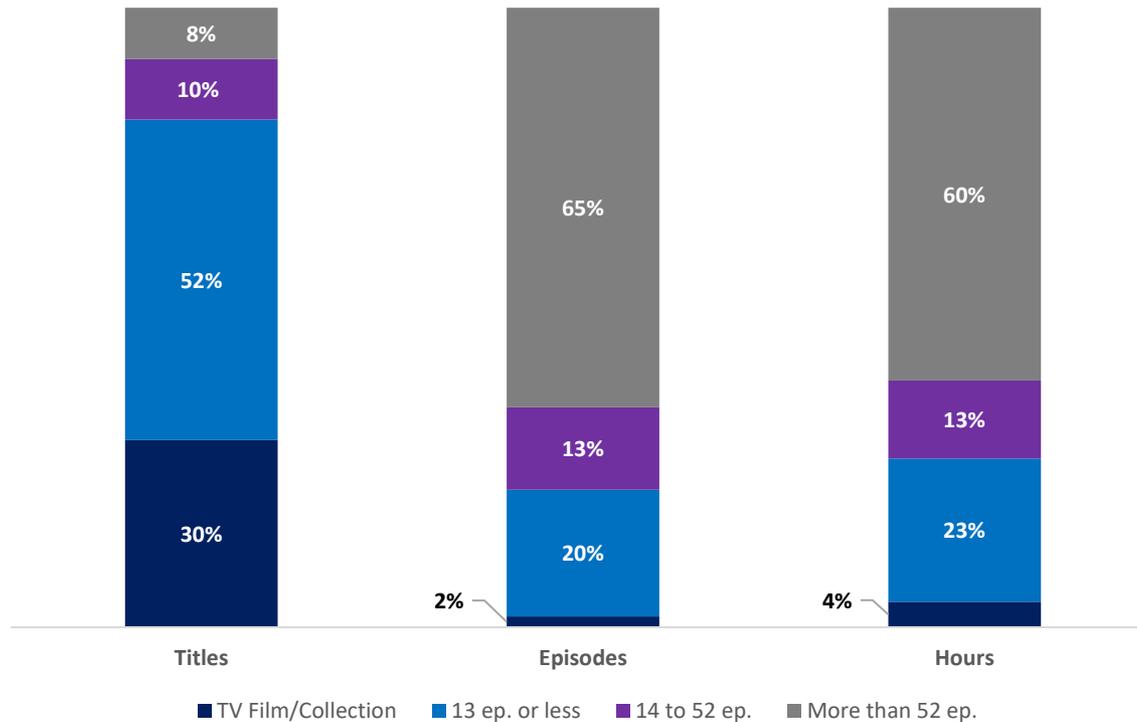
Volume of AV fiction produced in Europe (2015-2022)



Daily soaps account for only 8% of titles, but 60% of hours produced.

- Conversely, TV films and collections represent 30% of titles but only 4% of hours.
- Series with 13-episodes-or-less-per-seasons account for 52% of titles and 23% of hours.

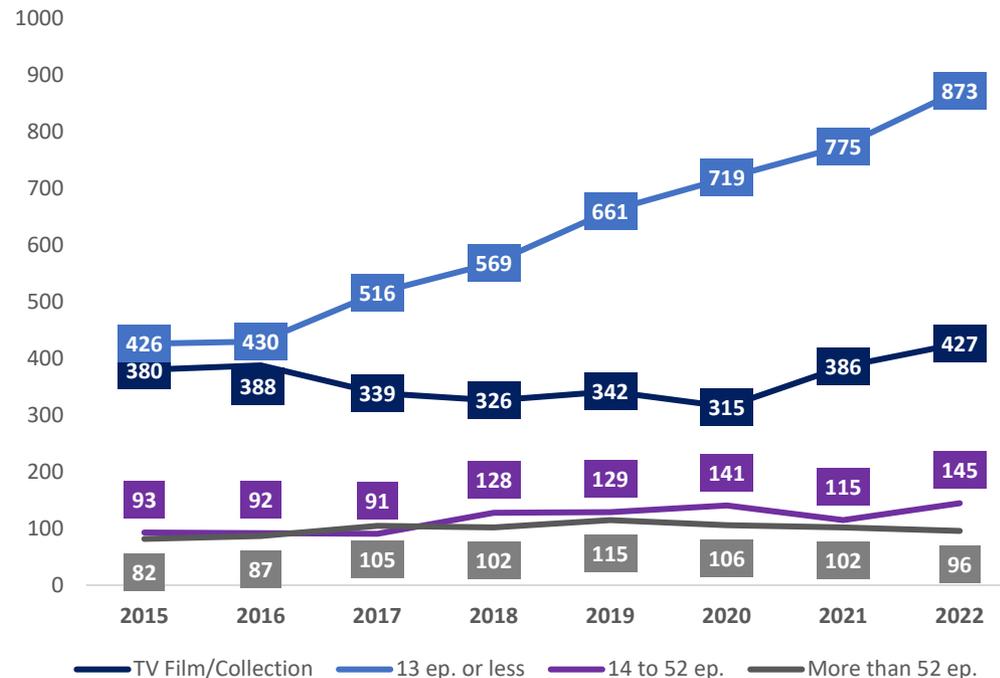
Breakdown of fiction titles, episodes and hours produced (average 2015-2022)



The number of series with 13-episodes-or-less-per-season has grown by 105% since 2015.

- The growth of series with 13-episodes-or-less-per-season remained uninterrupted by COVID-19.
- After the COVID-19 crisis, growth resumed for most formats in 2021 and 2022.
- The production of TV films continued its recovery in 2022 after several years of decline.

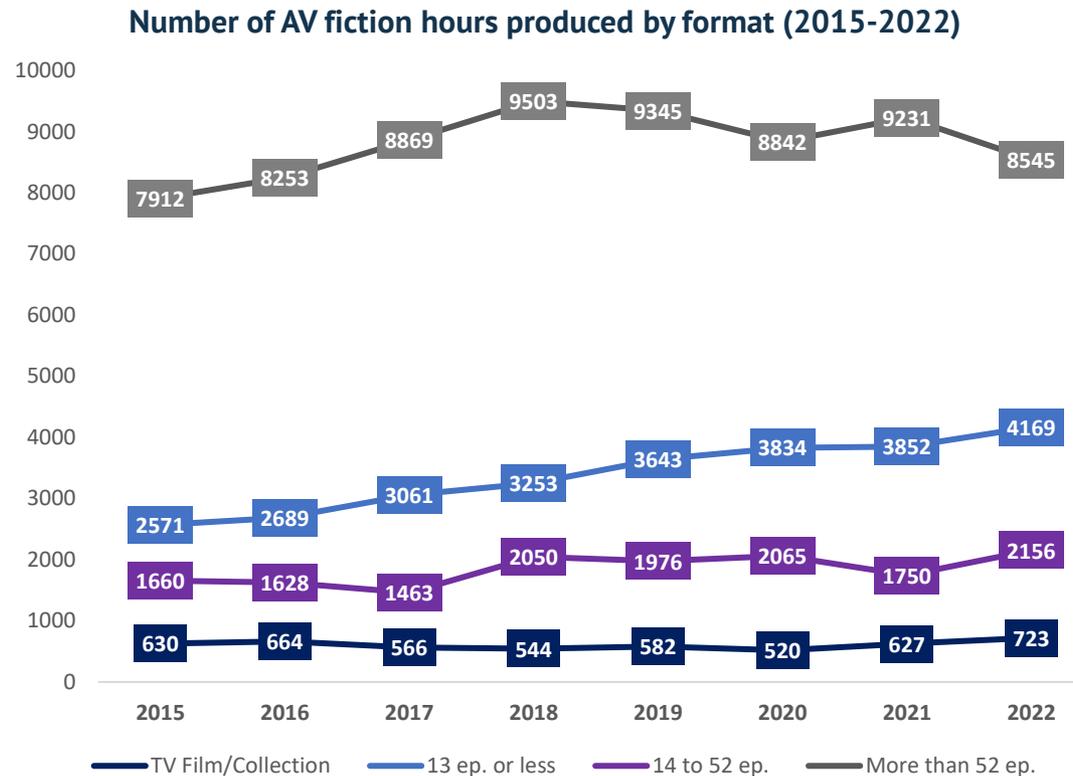
Number of AV fiction titles produced by format (2015-2022)



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

Drop in the volume of hours of daily soaps/TV novellas produced in 2022.

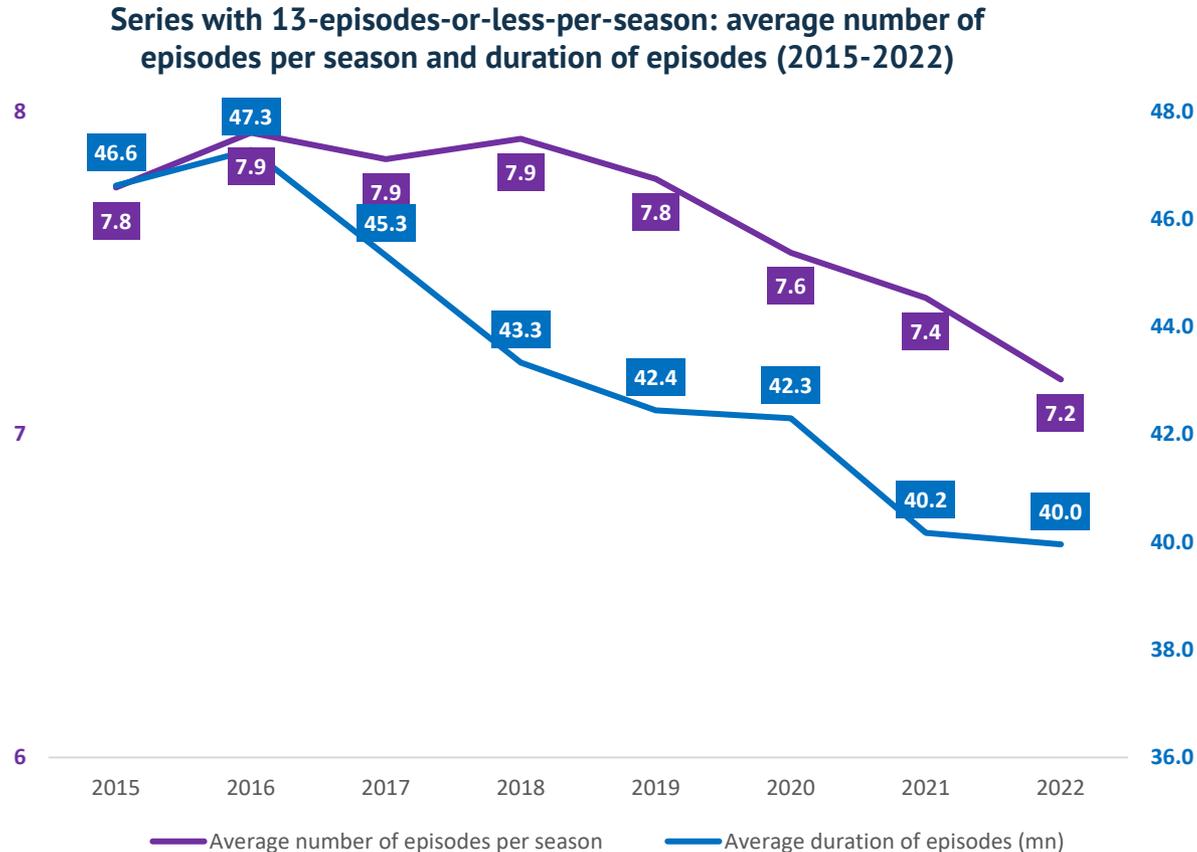
- Daily soaps/TV novellas were the exception to the post-COVID-19 recovery trend seen in other formats.
- The volume of hours of daily soaps/TV novelas produced in 2022 contracted by minus seven percent compared to the year before.



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

Series with 13-episodes-or-less-per-season: Fewer and shorter episodes.

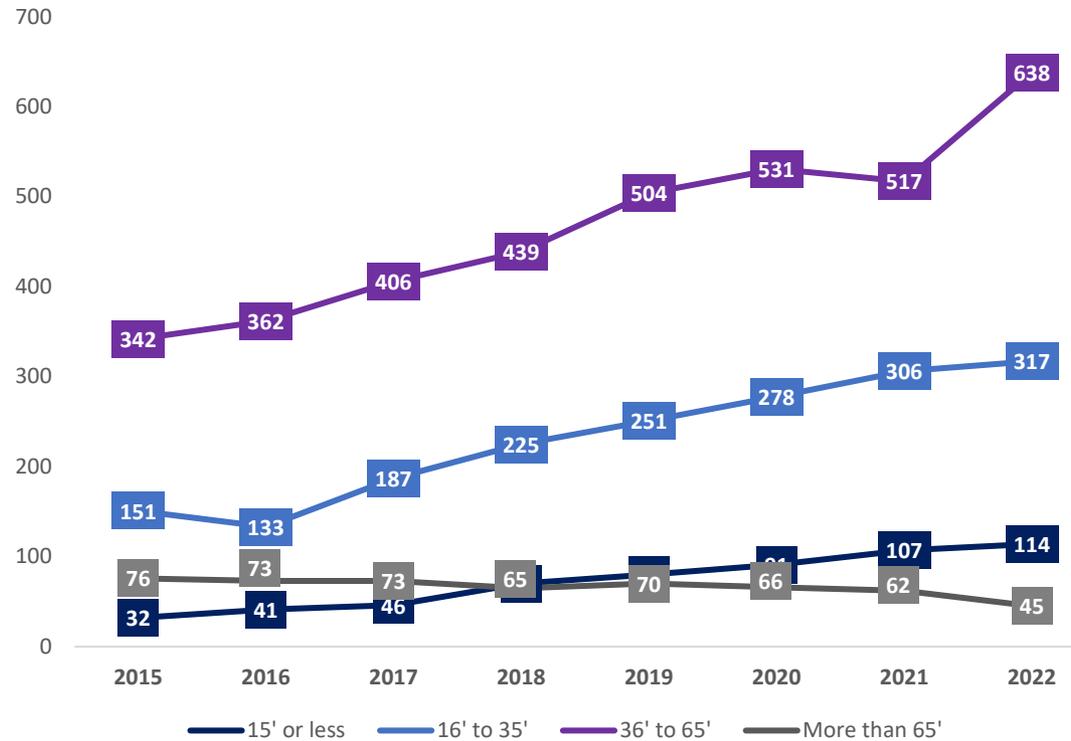
- The contrast between increasing numbers of seasons and slow growth in hours results from a decreasing average number of episodes per season.
- Episodes are also continuously shorter.



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

The episode duration of most TV series produced is longer than 16 minutes, typically 36 to 65 minutes.

Number of fiction titles by duration of episodes (excl. TV films and collections), 2015-2022

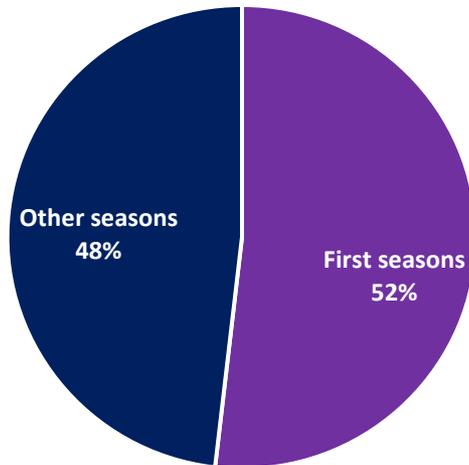


Source: European Audiovisual Observatory analysis of The European Metadata Group data

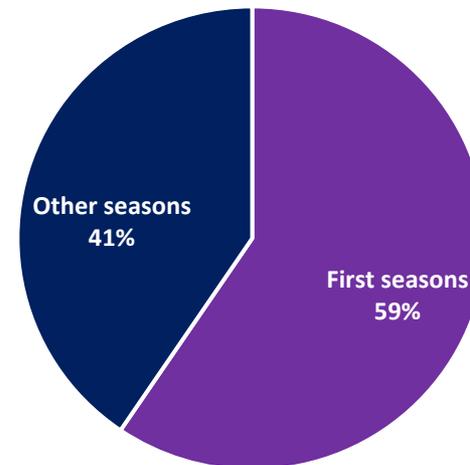
About half of series seasons are returning series (i.e. new seasons of existing programmes).

- The proportion of first seasons is higher (59%) for series with 13-episodes-or-less-per-season.
- However, the figures include “mini-series” designed, from the outset, to last one season only.

Share of first seasons among all series
(average 2015-2022)



Share of first seasons among series with 13-episodes-or-less-
per-season (average 2015-2022)

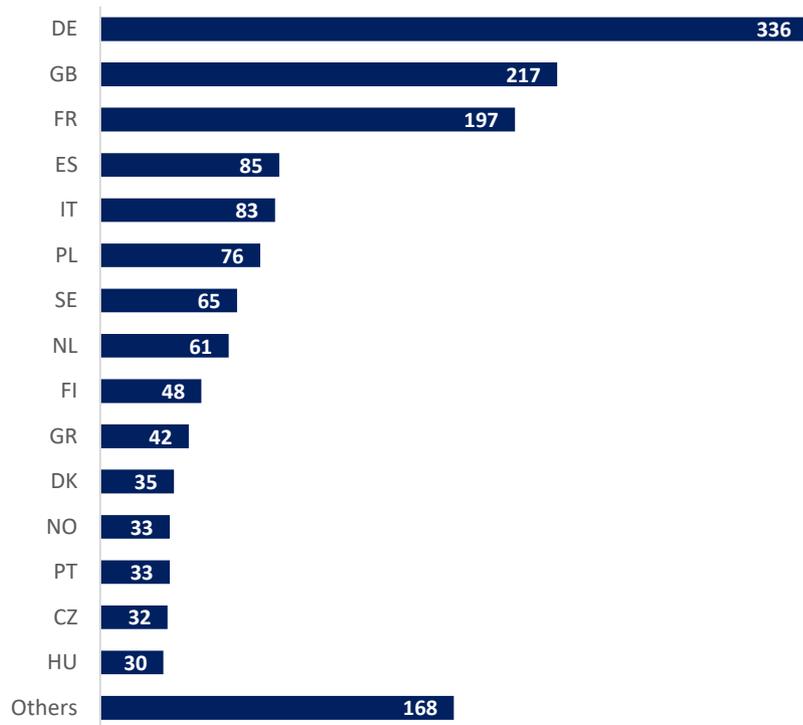


Origin of European audiovisual fiction

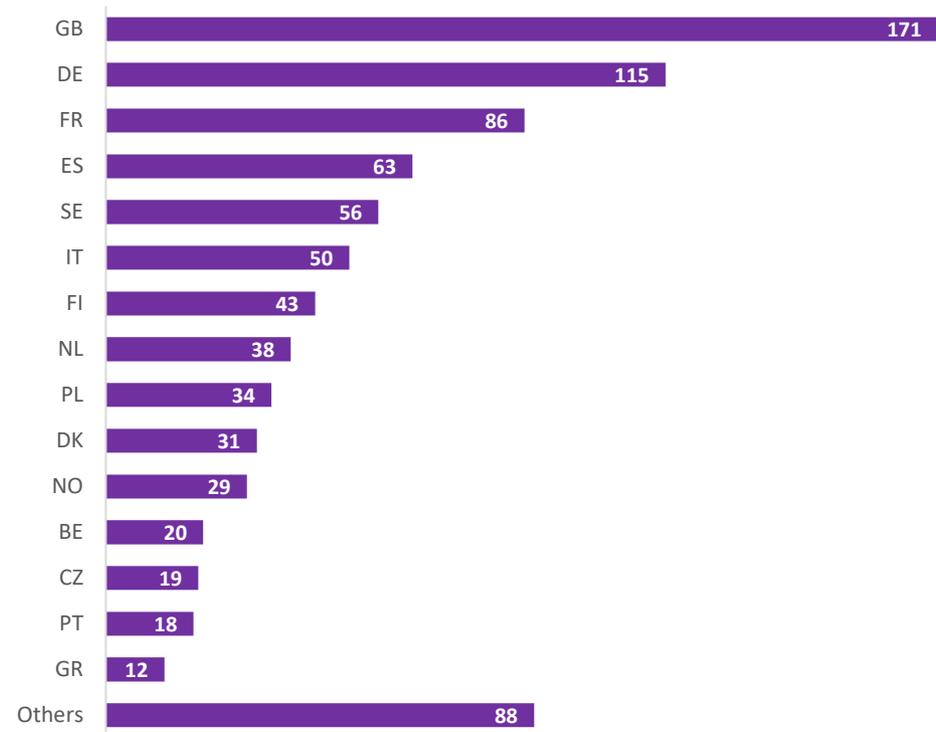
Germany is the leading fiction production country in Europe in number of TV seasons and TV films produced.

- The United Kingdom is the leading producer of series with 13-episodes-or-less-per-season.
- All three Scandinavian countries are in the top 10 for series with 13-episodes-or-less-per-season.

**Top fiction-production countries
in number of TV films/seasons (2022)**



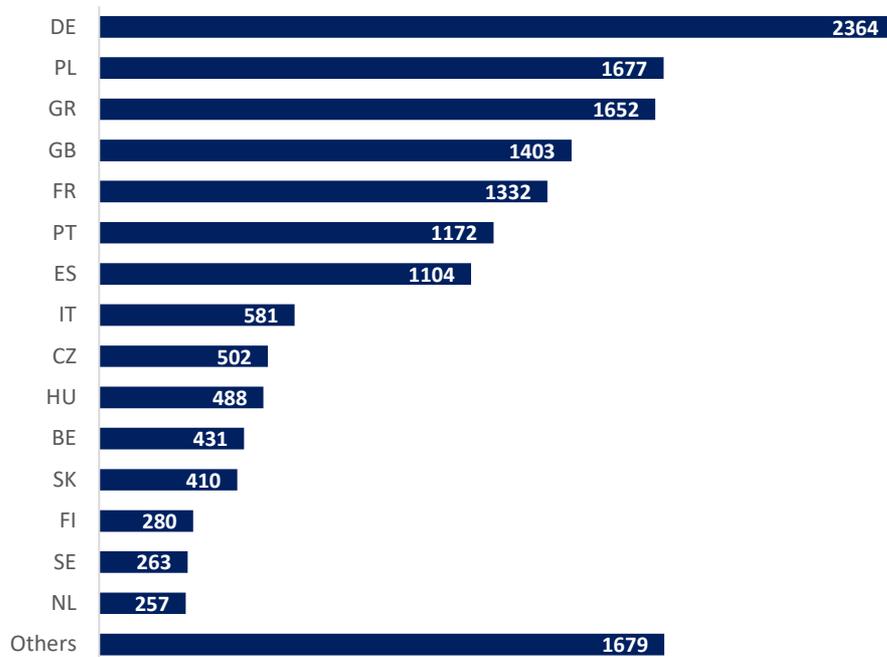
**Top series with 13-episodes-or-less-per-season-producing
countries in number of TV films/seasons (2022)**



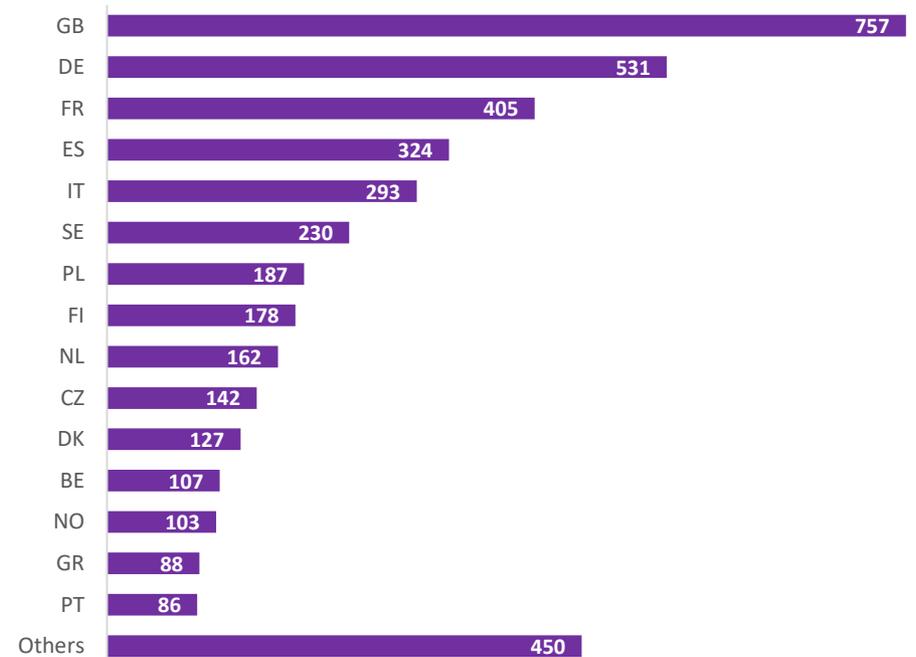
In terms of hours, Germany, Poland and Greece lead thanks to strong production of daily telenovelas/soaps.

- The United Kingdom, France and Portugal are also major producers of telenovelas and soaps.
- The five biggest markets lead the production of series with 13-episodes-or-less-per-season.

Top fiction-producing countries
in number of hours (2022)



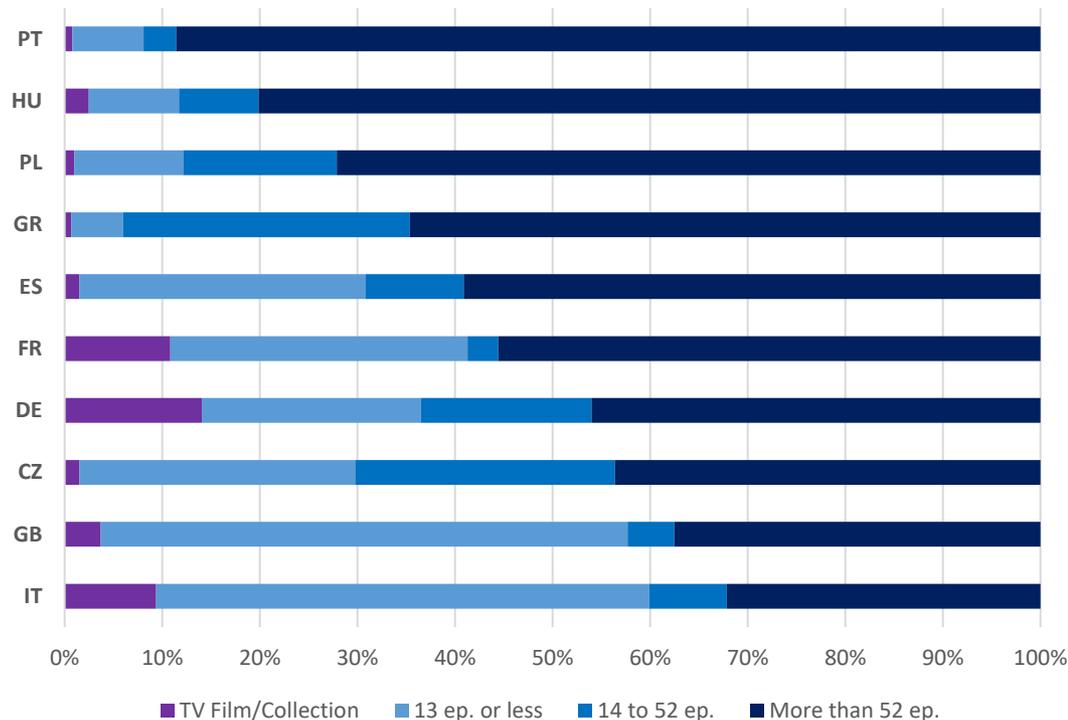
Top countries producing series with 13-episodes-or-less-per-season - in number of hours (2022)



The structure of fiction production varies between the leading countries.

- Long-running soaps are dominant in Portugal, Hungary, Poland and Greece.
- Germany, France and Italy put a higher-than-average emphasis on TV films.
- Series with 13-episodes-or-less-per-season have significant weight in Italy, the United Kingdom and France.

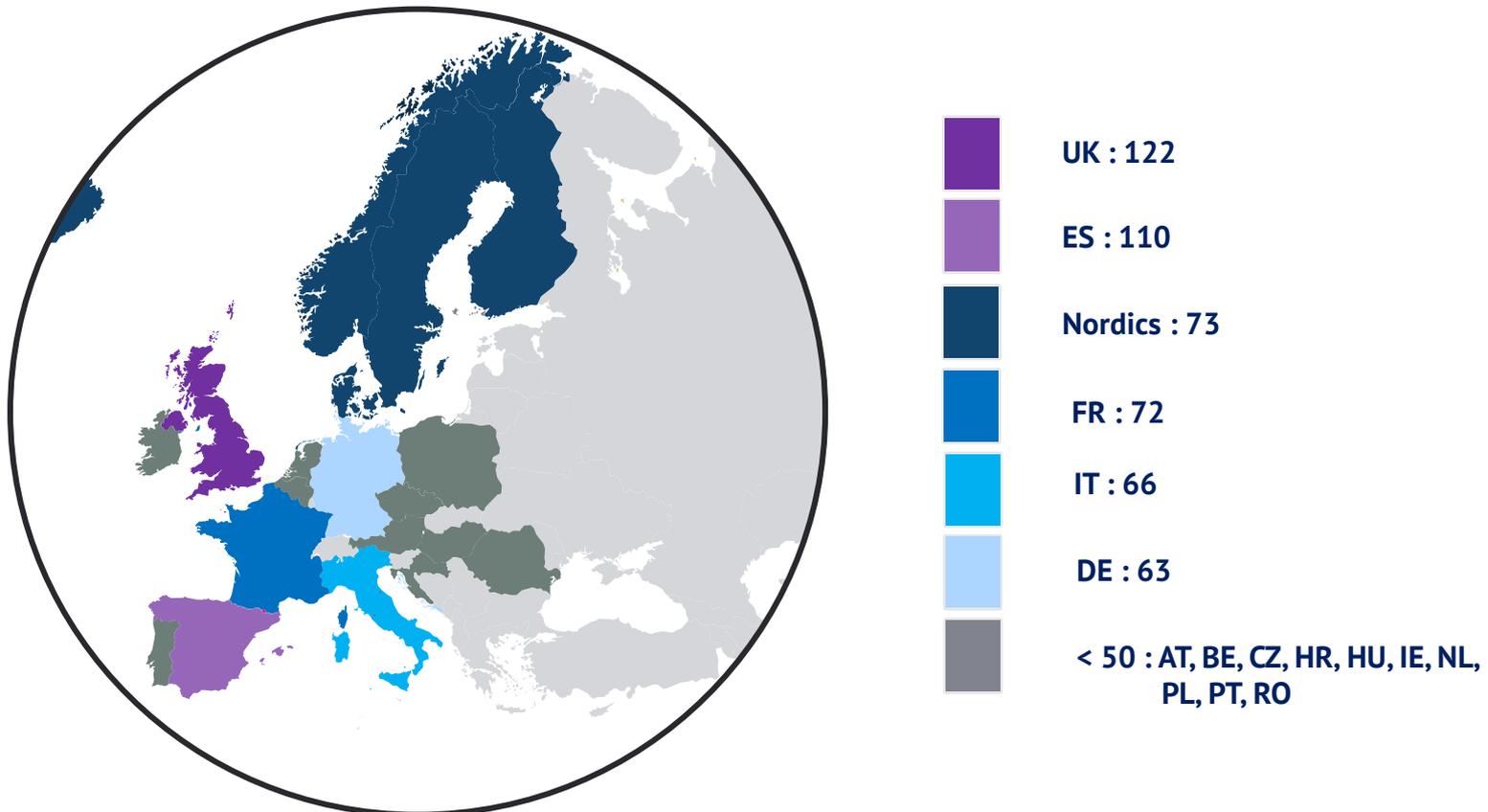
Hours of fiction produced by country and format (top 10 producing countries) in % (2022)



Streamers have geographic preferences for production countries.

- In 2022, most TV fiction commissioned by global streamers was produced in the UK and Spain.
- Other significant production hubs for streamers were the Nordic countries and France (2015-2022).

Map of production countries of fiction titles commissioned by global streamers (2015-2022)



International co-productions

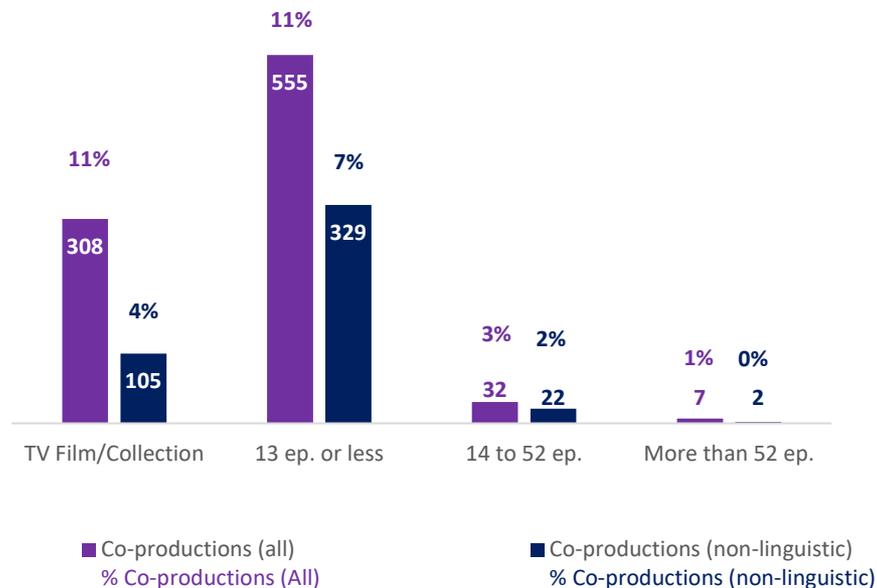
Over 100 co-productions per year, almost exclusively of series with 13-episodes-or-less-per-season and TV films.

- Co-productions made up 7% of all TV fiction titles produced in Europe in 2022.
- Co-productions accounted for 11% of series with 13-episodes-or-less-per-season between 2015 and 2022, and 7% when excluding co-productions between neighbouring countries sharing the same language.

Number of co-productions (2015-2022)



Number and share of co-productions by format (total 2015-2022)

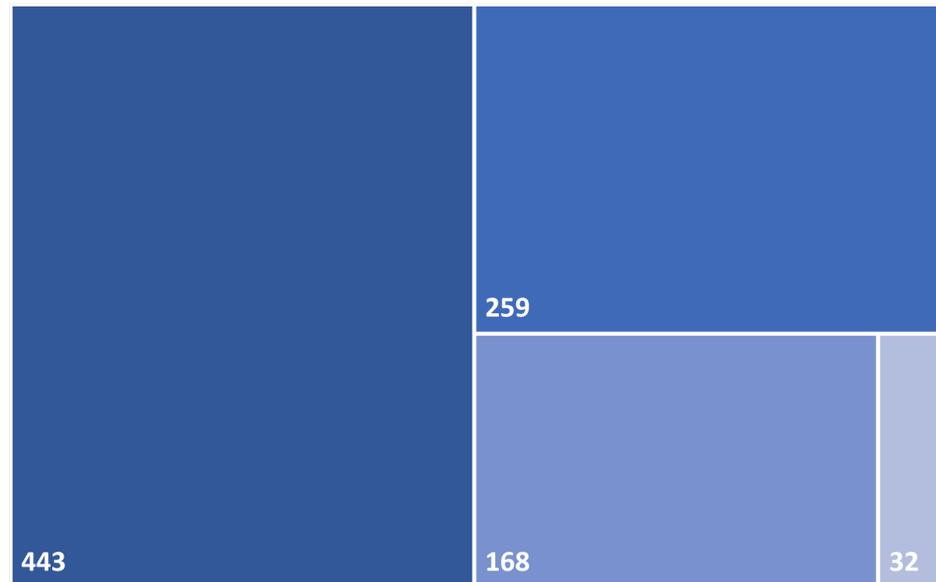


Source: European Audiovisual Observatory analysis of The European Metadata Group data

Most non-linguistic co-productions include only European countries.

- However, around one in five link at least one European country with the United States and/or Canada.
- Excluding the United States and Canada, there are few co-productions with non-European countries.

**Breakdown of co-productions by participating regions
(total 2015-2022)**

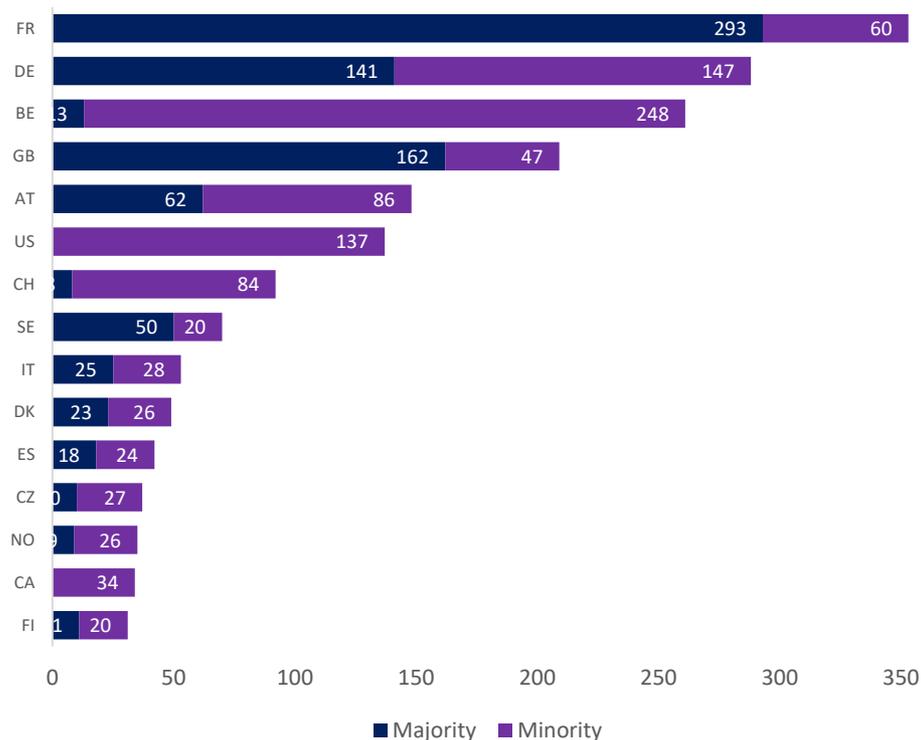


- European "linguistic" co-productions
- Only European countries (excl. "linguistic")
- Europe + USA and/or Canada
- Europe + other non-European countries and not USA or Canada

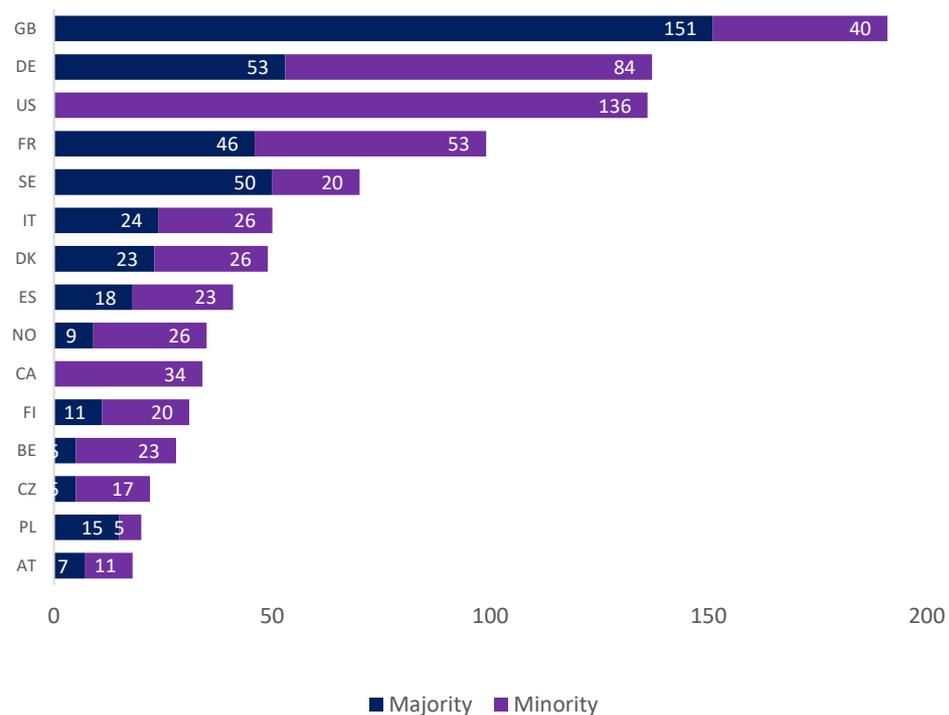
France, Germany and Belgium are involved in the highest number of co-productions.

- 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.

Number of participations in co-productions (total 2015-2022)



Number of participations in co-productions (excl. linguistic coprod., total 2015-2022)

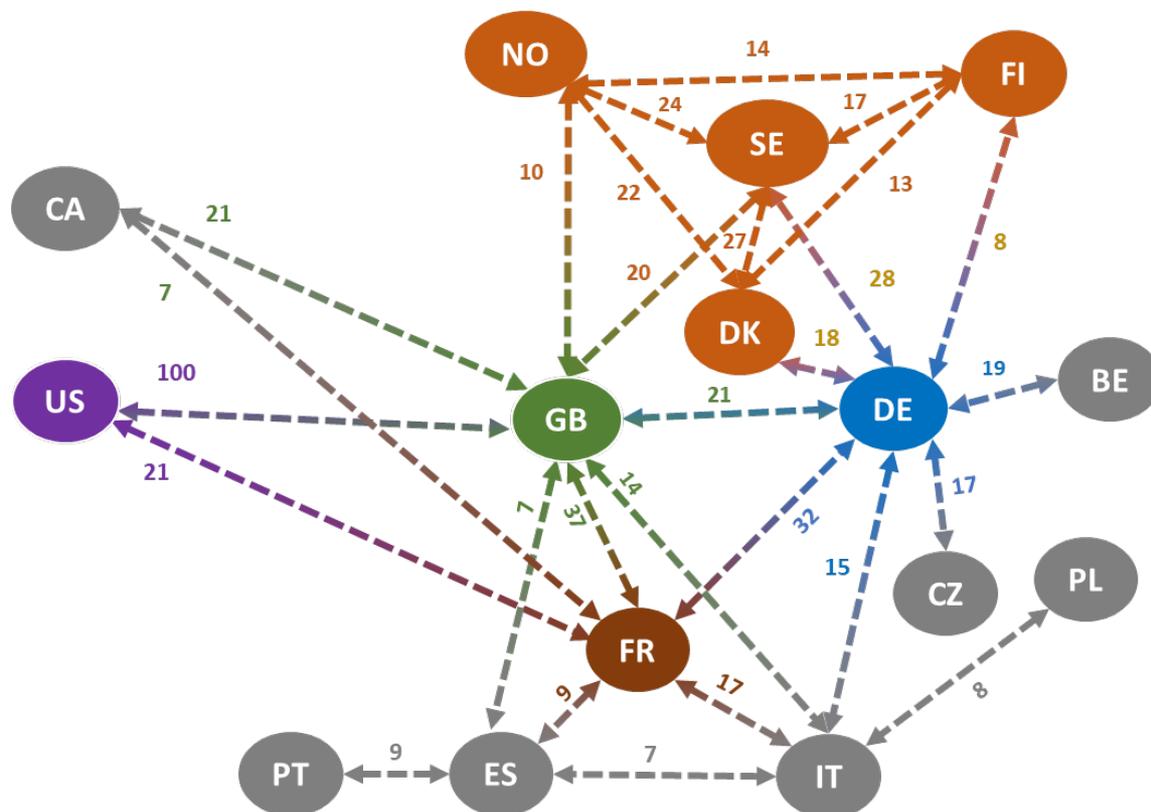


Source: European Audiovisual Observatory analysis of The European Metadata Group data

Scandinavia, the United Kingdom, France and Germany are the main co-production hubs.

- The UK primarily co-produces with the US, but also significantly co-produces with other European countries.
- Scandinavian countries often co-produce with each other, but also considerably with Germany and the United Kingdom.

Number of partnerships in non-linguistic co-productions in selected countries (2022)



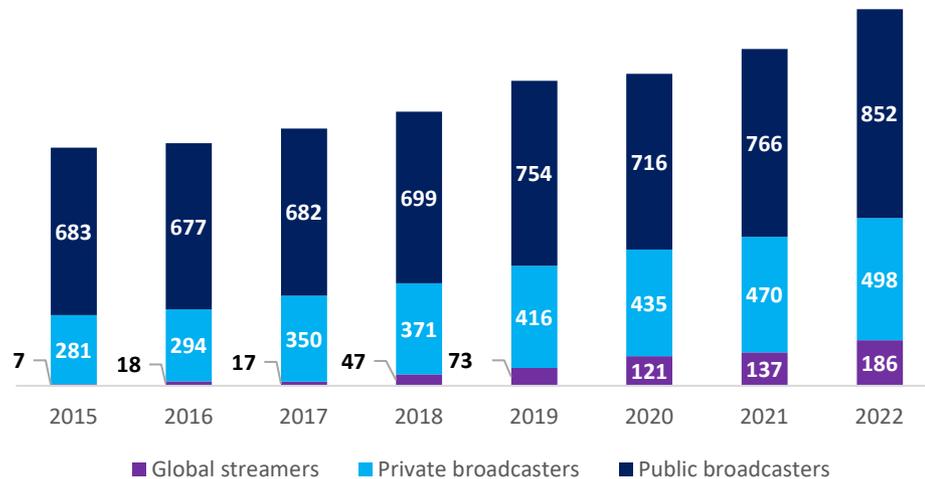
Important note: the number of partnerships differs from the number of projects. Denmark may have participated with Sweden and with Norway in the same projects.

Commissioners of European audiovisual fiction

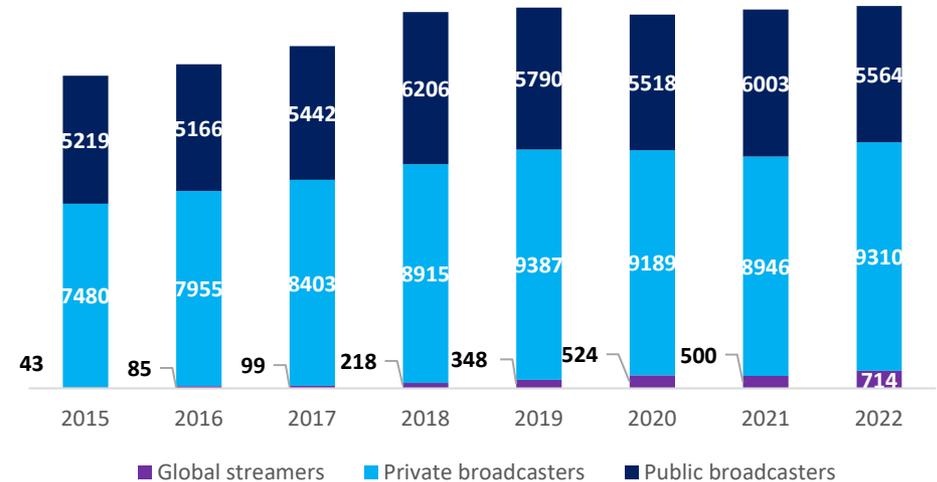
Public service broadcasters commission 55% of titles and 39% of hours.

- Conversely, private broadcasters commission 32% of titles and 58% of hours. Indeed, private broadcasters tend to dedicate a higher share of their commissioning to daily soaps/telenovelas.
- Global streamers account for 12% of titles but 3% of hours, as they do not invest in soaps/telenovelas.

Fiction titles commissioned by category of players (2015-2022)



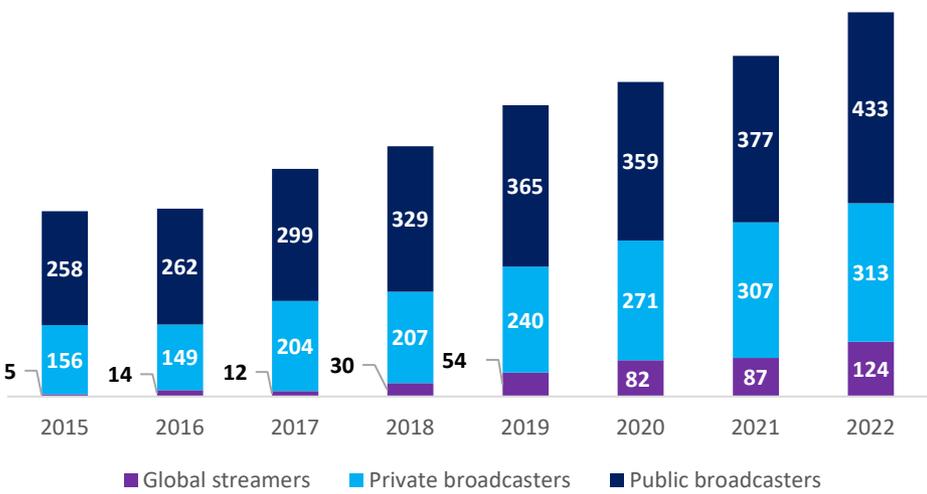
Fiction hours commissioned by category of players (2015-2022)



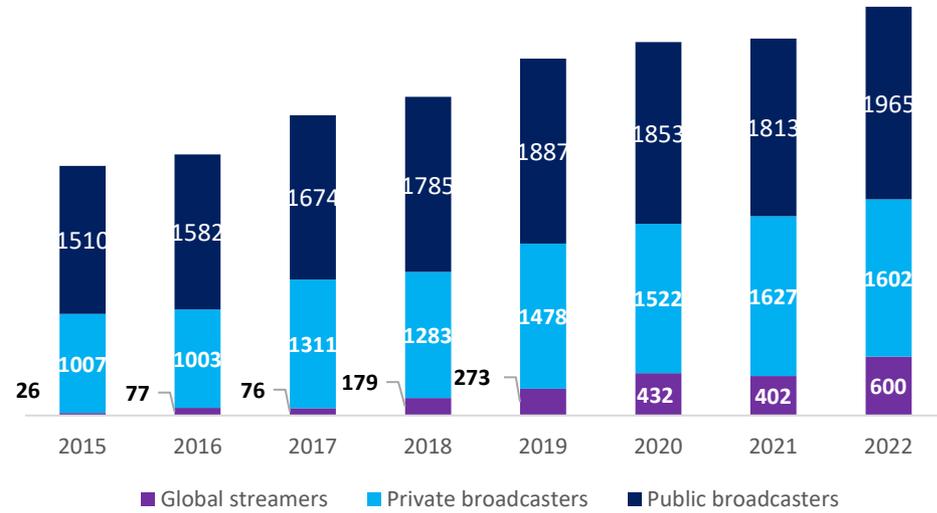
The picture is quite different when looking at series with 13-episodes-or-less-per-season.

- The share of public broadcasters in the commissioning of series with 13-episodes-or-less-per-season has decreased since 2015.
- The global streamers' share was at 14% in 2022, up from 11% in 2021.

Series with 13-episodes-or-less-per-season commissioned by category of players (2015-2022)



Series with 13-episodes-or-less-per-season hours commissioned by category of players (2015-2022)



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

The BBC, Netflix and the ZDF led the commissioning of series with 13-episodes-or-less-per-season.

Top 20 commissioners of series with 13-episodes-or-less-per-season titles (2022)

Rank	Group	Titles
1	BBC	76
2	Netflix	67
3	ZDF	37
4	Warner Bros. Discovery (Europe)	31
5	Sky (Comcast)	30
6	ARD	28
7	NPO	25
8	RTL Group	25
9	ITV	25
10	Amazon	24
11	Yleisradio (YLE)	23
12	Viaplay Group	22
13	Sveriges Television (SVT) Group	20
14	RAI	20
15	Groupe Canal Plus (Vivendi)	19
16	PPF Group	19
17	RTBF	18
18	SRG-SSR	16
19	Telia Company	16
20	ORF	14

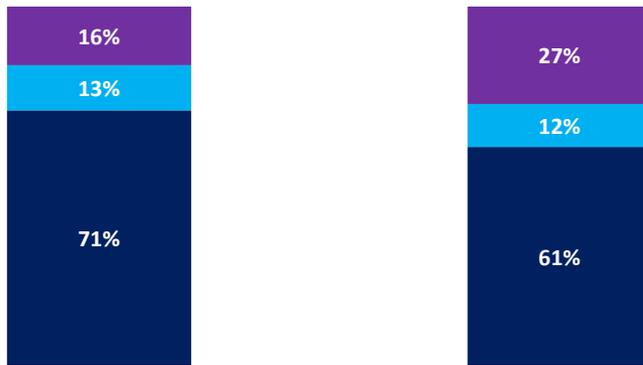
Important note: these figures are indicative as each title is attributed to only one broadcaster, even in the case of co-productions involving several broadcasters.

Producers of European audiovisual fiction

Independent productions include a) those from production groups non-affiliated with a major broadcaster, and b) those affiliated with a major broadcaster – but produced for another broadcaster.

- Production by independent producers accounted for over 70% of titles (both for all formats and for series with 13-episodes-or-less-per-season. Other independent productions by broadcasters working for third-party broadcasters accounted for 13% and 17% of titles for all formats and for series with 13-episodes-or-less-per-season, respectively.
- Please note that the actual control of IP rights is not taken into account.

**Breakdown of production by category of producer
(all fiction - 2022)**

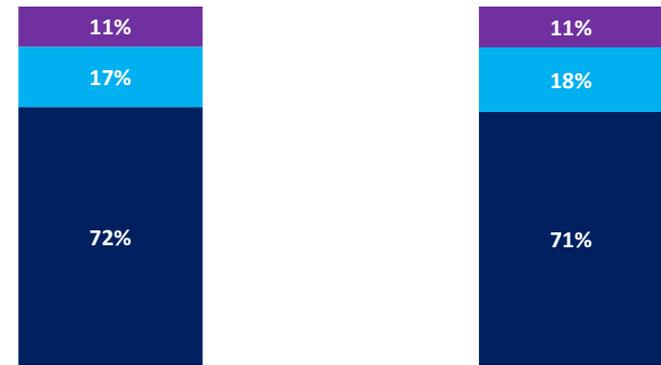


Titles

Hours

- Affiliated production group for affiliated broadcaster (dependent)
- Affiliated production group for non-affiliated broadcaster (independent)
- Non-affiliated production group (independent)

**Breakdown of production by category of producer
(series with 13-episodes-or-less-per-season - 2022)**



Titles

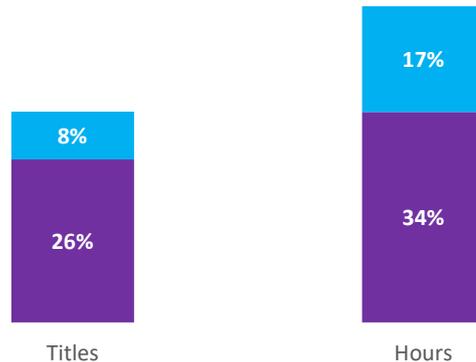
Hours

- Affiliated production group for affiliated broadcaster (dependent)
- Affiliated production group for non-affiliated broadcaster (independent)
- Non-affiliated production group (independent)

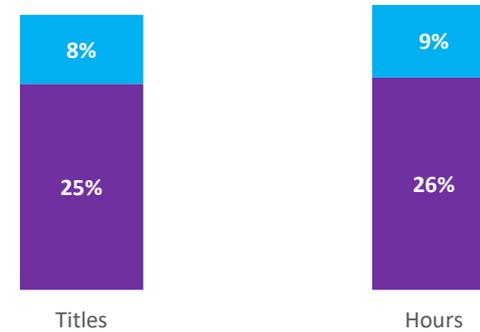
Top 20 producers account for 34% of titles and 51% of hours.

- The concentration in hours is strongly influenced by the production of telenovelas/soaps (comparatively few titles, each comprising many hours).
- The concentration is similar in terms of titles for series with 13-episodes-or-less-per-season (33%), but lower in terms of hours (35%).

Share of the top 20 producers out of total production
(all fiction, 2022)



Share of the top 20 producers out of total production
(series with 13-episodes-or-less-per-season, 2022)



■ Top 10 ■ 11 to 20

■ Top 10 ■ 11 to 20

Top 20 producers account for 37% of titles and 57% of hours.

- The concentration in hours is strongly influenced by the production of telenovelas/soaps (comparatively few titles, each comprising many hours).
- The concentration is similar in terms of titles for series with 13-episodes-or-less-per-season (39%), but lower in terms of hours (42%).

Top 10 producers (2022) by...

Number of titles produced

Number of independent titles produced

Number of different countries of production

Rank	Group	Titles
1	Banijay Group	57
2	ARD	55
3	RTL Group	49
4	ITV	49
5	ZDF	45
6	Mediawan + Leonine	44
7	Beta Film	28
8	BBC	26
9	Warner Bros. Discovery	26
10	TF1	24

Rank	Group	Titles
1	Banijay Group	57
2	RTL Group	36
3	Mediawan + Leonine	44
4	Beta Film	28
5	ITV	26
6	Highlight Communications	24
7	Warner Bros. Discovery	22
8	TF1	19
9	Asacha	11
10	John Malone	11

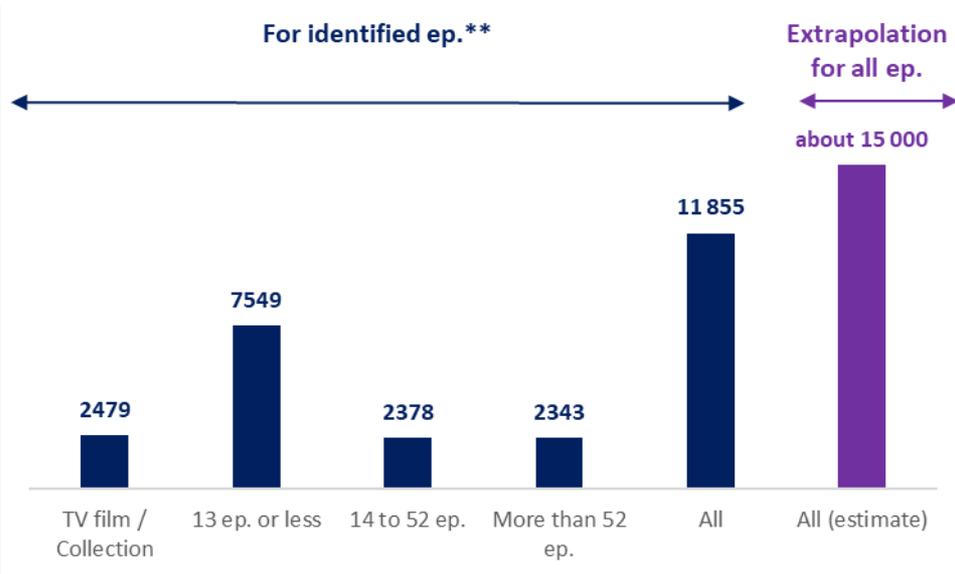
Rank	Group	Countries
1	Banijay Group	12
2	RTL Group	12
3	ITV	8
4	Beta Film	7
5	TF1	7
6	Warner Bros. Discovery	7
7	Mediawan + Leonine	6
8	Viaplay Group	5
9	Vivendi	5
10	Federation Entertainment	4

Screenwriters and directors of European audiovisual fiction

About 15 000 different writers involved in the production of fiction between 2015 and 2022.

- For identified** episodes, close to 12 000 different screenwriters wrote or co-wrote at least one fiction episode between 2015 and 2022.
- Extrapolating from the sample of identified episodes, the total number of screenwriters active in audiovisual fiction between 2015 and 2022 can be estimated at around 15 000.

Active screenwriters of AV fiction by format* (2015-2022)



Active screenwriters of AV fiction by year* (2015-2022)



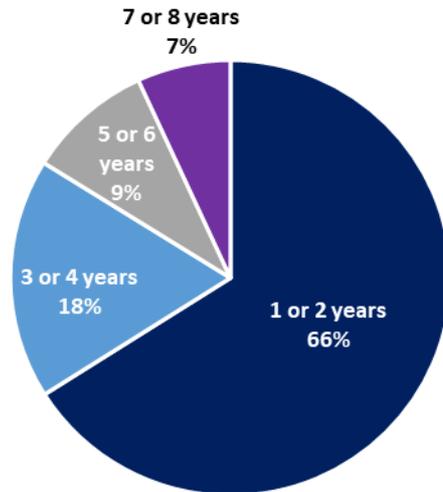
* All: the figure is lower than the sum of each year as there are double-counts between years and formats.

** Identified episode: an episode for which at least one screenwriter or at least one director has been identified.

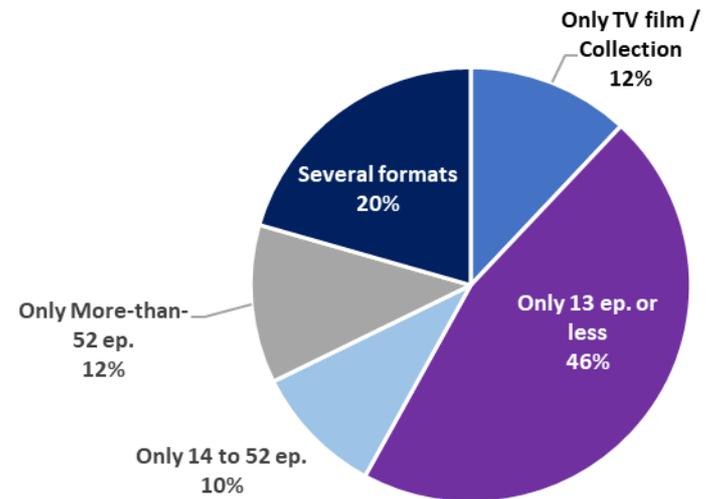
Two-thirds of identified screenwriters were active* for only one or two years between 2015 and 2022.

Screenwriters tend to be specialised by format: only 20% of them were credited for at least one episode in two or more different-format projects.

Screenwriters of AV fiction by number of years of activity between 2015 and 2022



Screenwriters of AV fiction active by format (2015-2022)

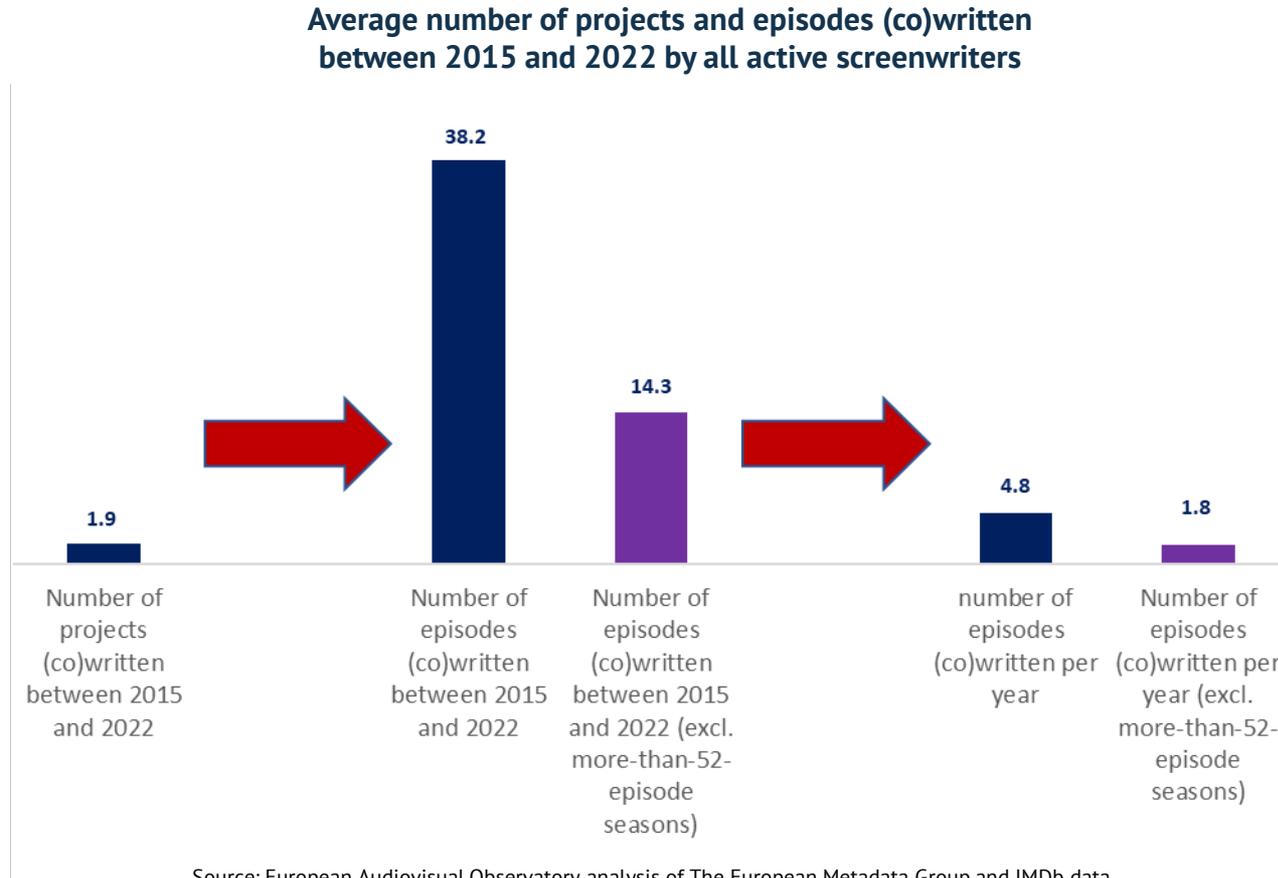


Source: European Audiovisual Observatory analysis of The European Metadata Group and IMDb data

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

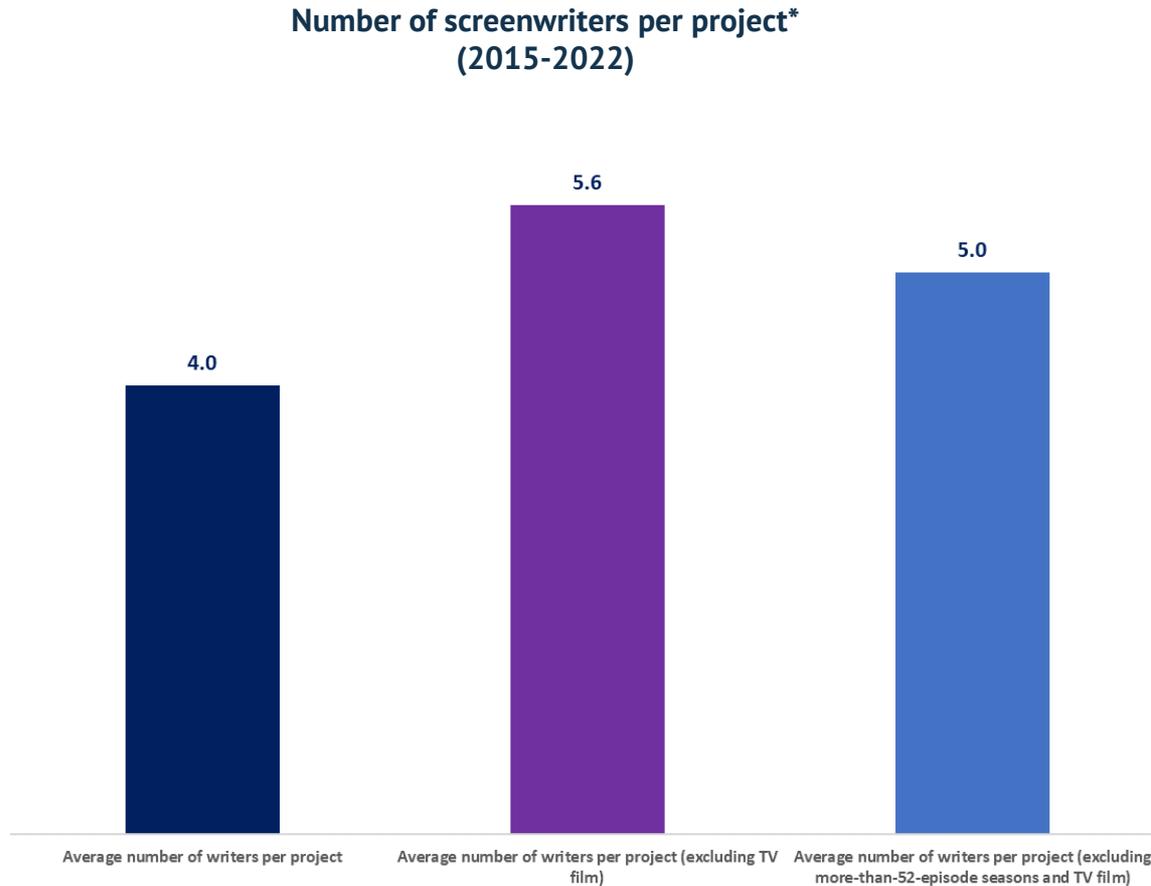
On average, a writer was involved in close to two projects* between 2015 and 2022.

- These two projects translated into the writing of 14.3 episodes (excl. series with more-than-52-episodes-per-season), i.e. 1.8 episodes written per year.



* Project: a TV film or a TV series.

A fiction series involves 5.6 writers on average, and exactly 5 when excluding series with more-than-52-episodes-per-season.



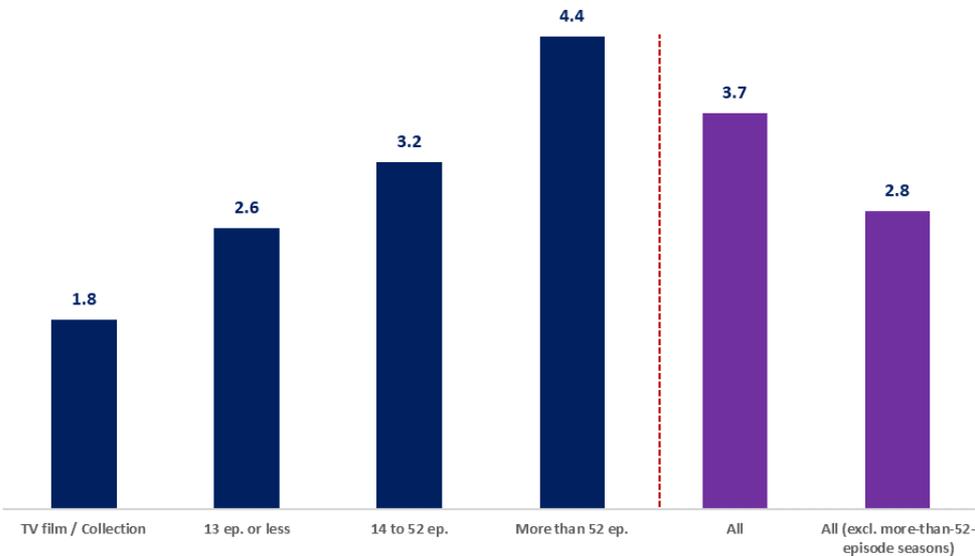
Source: European Audiovisual Observatory analysis of The European Metadata Group and IMDb data

* Project: a TV film or a TV series.

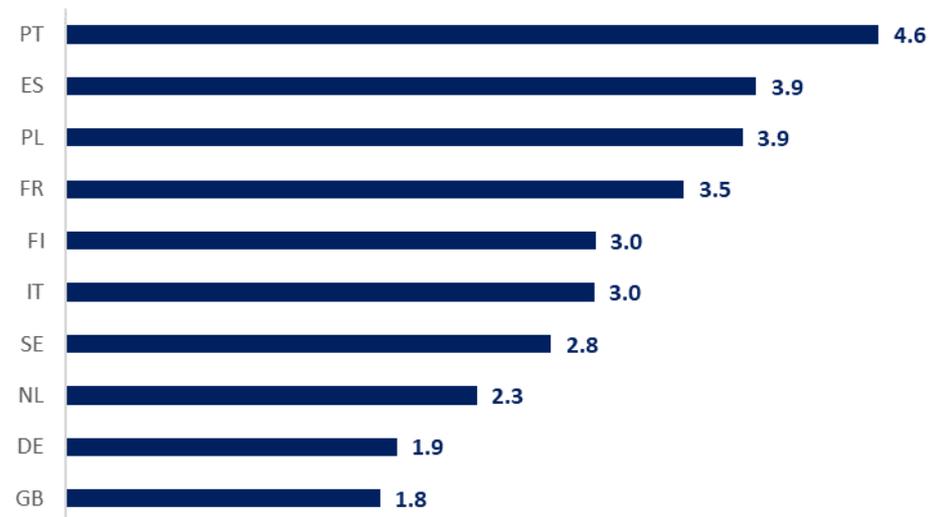
72% of all episodes released between 2015 and 2022 were co-written by at least two writers.

- The average number of screenwriters per episode was 3.7 but 2.8 when excluding series with more-than-52-episodes-per-season.*
- More screenwriters were credited per episode for Portuguese, Polish and Spanish fiction.

Number of screenwriters per episode and by format (2015-2022)



Number of writers per episode in selected countries of production (excl. series with more-than-52-episodes-per-season, 2015-2022)

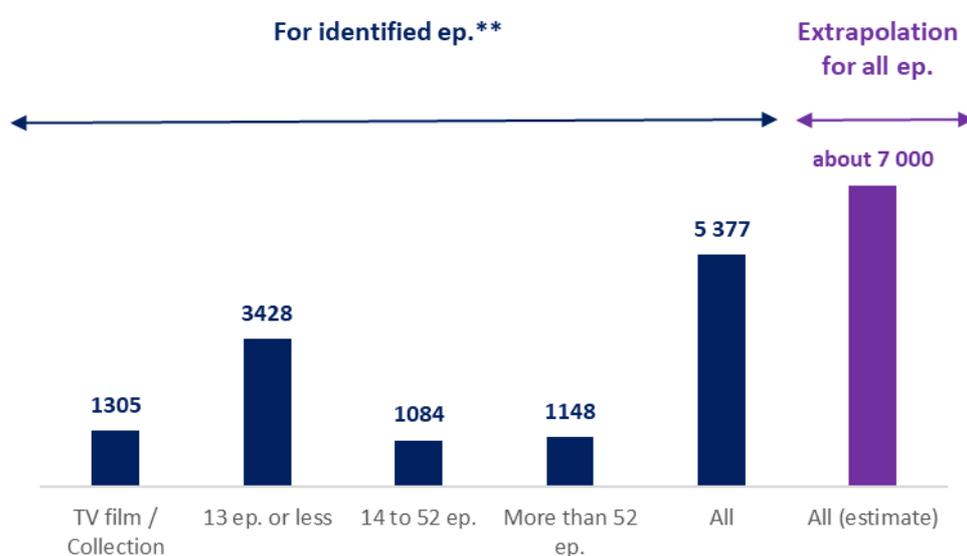


* For telenovelas or soaps the writers and directors are often credited for all episodes, regardless of the number they actually write or direct.

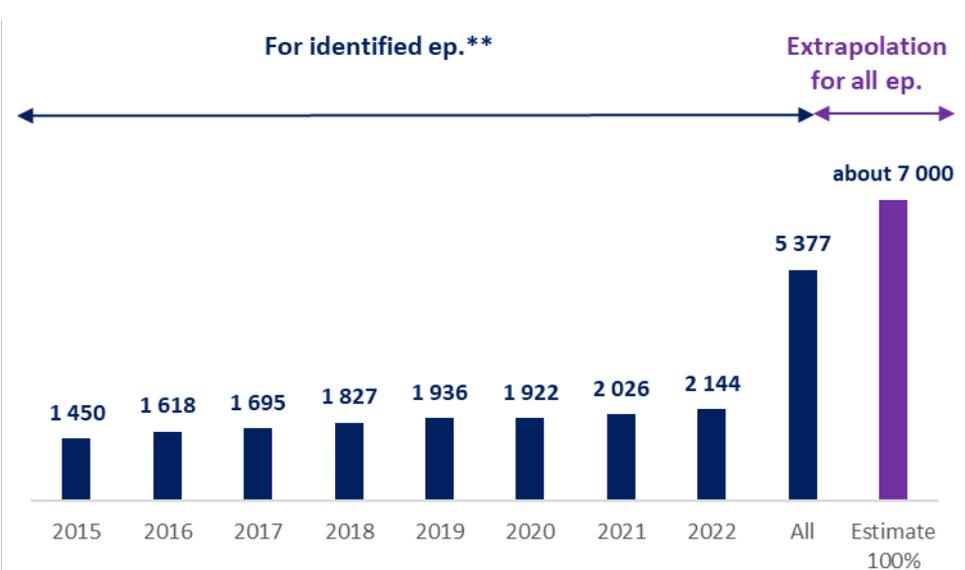
About 7 000 different directors were involved in the production of fiction between 2015 and 2022.

- For episodes identified,** over 5 300 different directors directed or co-directed at least one fiction episode between 2015 and 2022.
- Extrapolating from the sample of identified episodes, the total number of directors active in audiovisual fiction between 2015 and 2022 can be estimated at around 7 000.

Active directors of AV fiction by format* (2015-2022)



Active directors of AV fiction by year* (total 2015-2022)



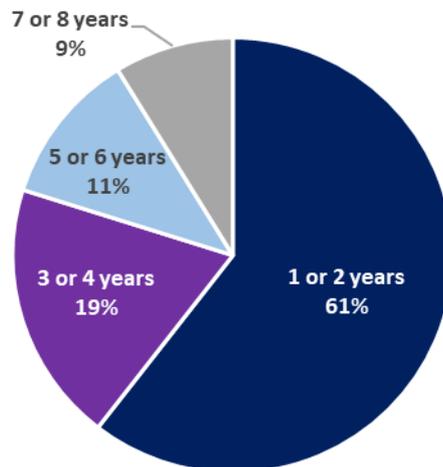
* All: the figure is lower than the sum of each year as there are double-counts between years and formats.

** Identified episode: an episode for which at least one screenwriter or at least one director has been identified.

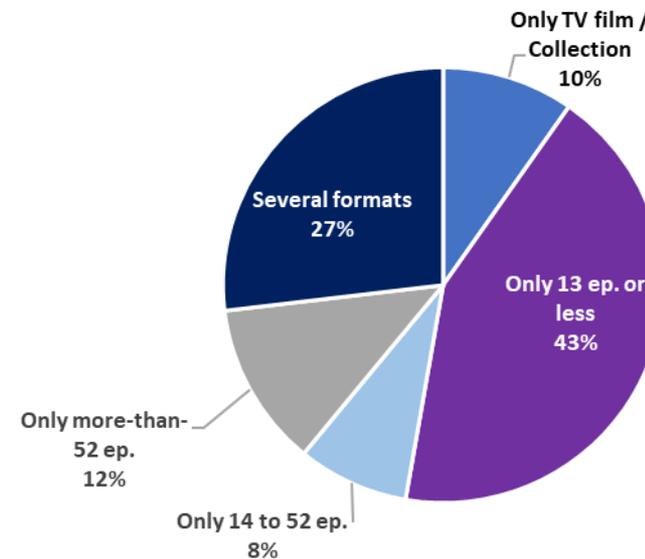
About 60% of identified directors were active* for only one or two years between 2015 and 2022.

Screenwriters tend to be specialised by format: only 27% 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 2022



Directors of AV fiction active by format (2015-2022)

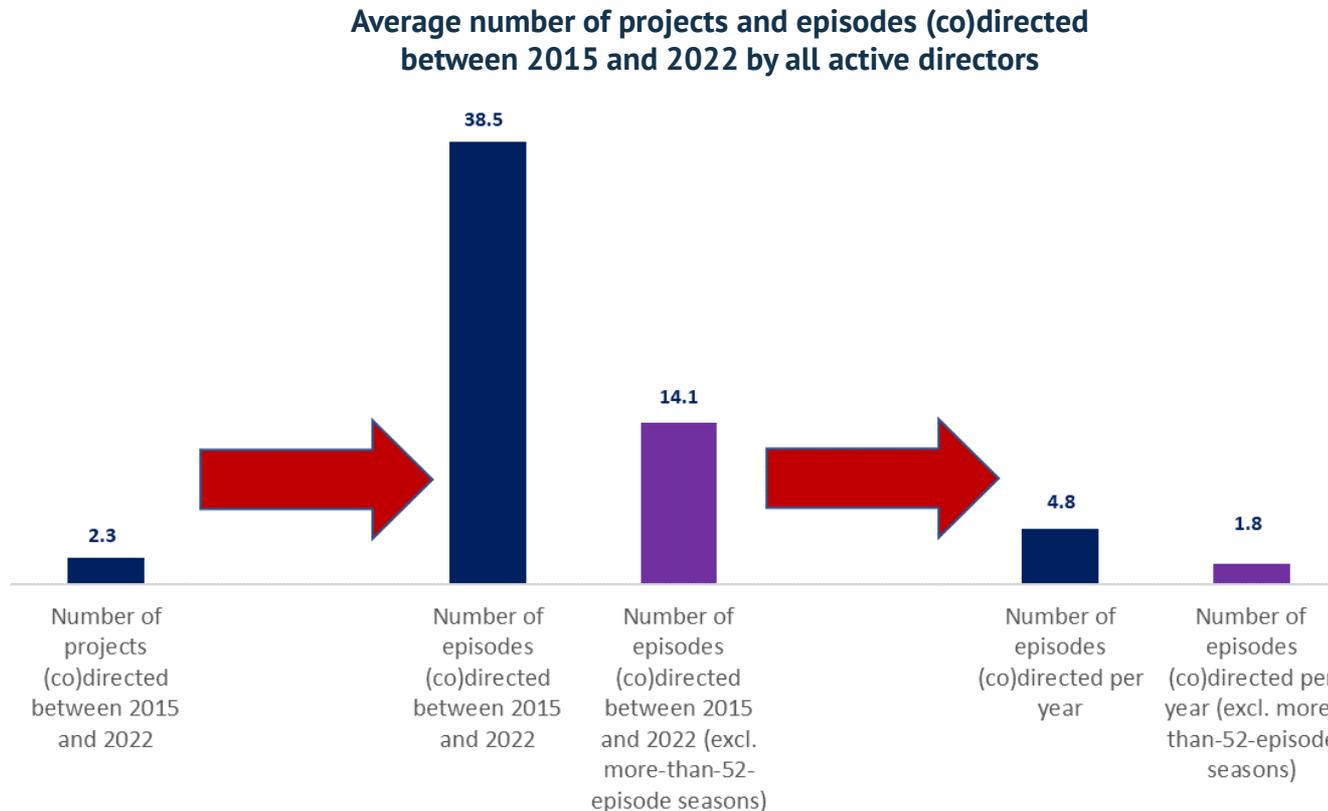


Source: European Audiovisual Observatory analysis of The European Metadata Group and IMDb data

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

On average, a director was involved in over two projects* between 2015 and 2022.

- These two projects translated into the writing of 14.1 episodes (excl. series with more-than-52-episodes-per-season), i.e. 1.8 episodes written per year.

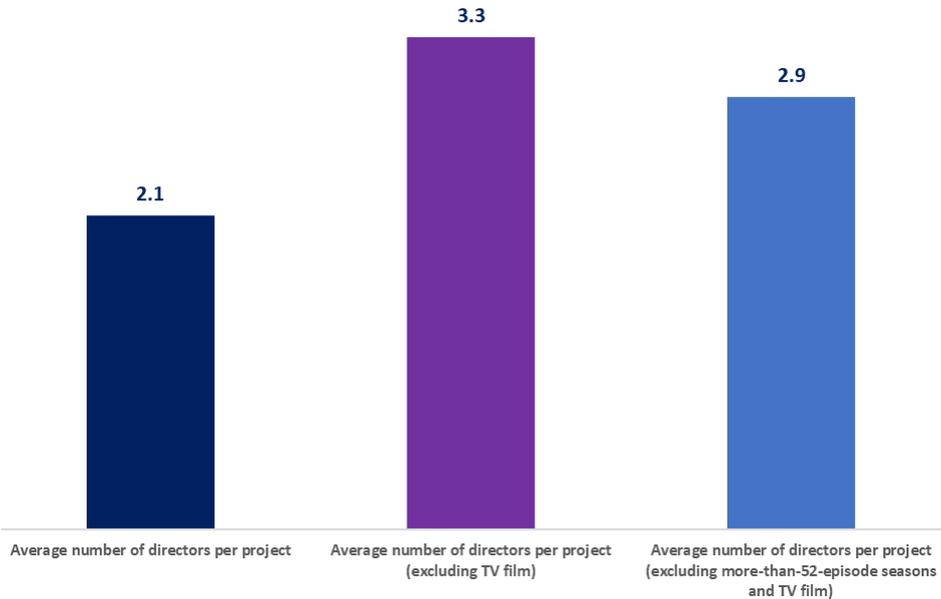


Source: European Audiovisual Observatory analysis of The European Metadata Group and IMDb data

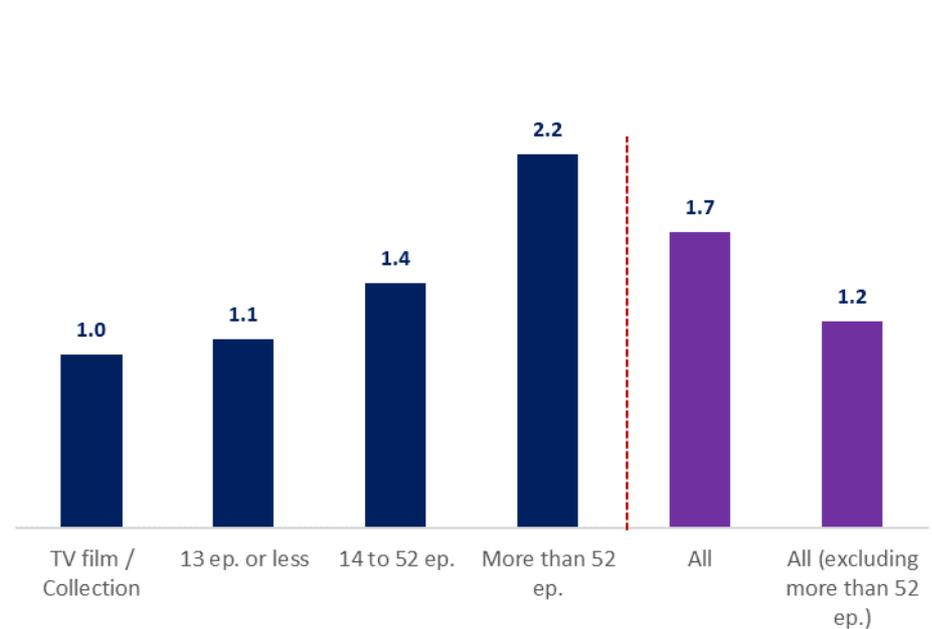
32% of all episodes released between 2015 and 2022 were co-directed.

- The average number of directors per episode was 1.7, but 1.2 when excluding series with more-than-52-episodes-per-season.*
- Directors were also credited as screenwriters (or as one of the screenwriters) for 25% of TV films and 21% of episodes of series with 13-episodes-or-less-per-season.

Number of screenwriters per project** (2015-2022)



Number of directors per episode and by format (2015-2022)



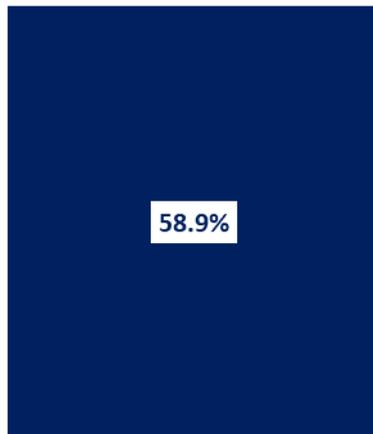
* For telenovelas or soaps the writers and directors are often credited for all episodes, whatever the number they actually write or direct.

** Project: a TV film or a TV series.

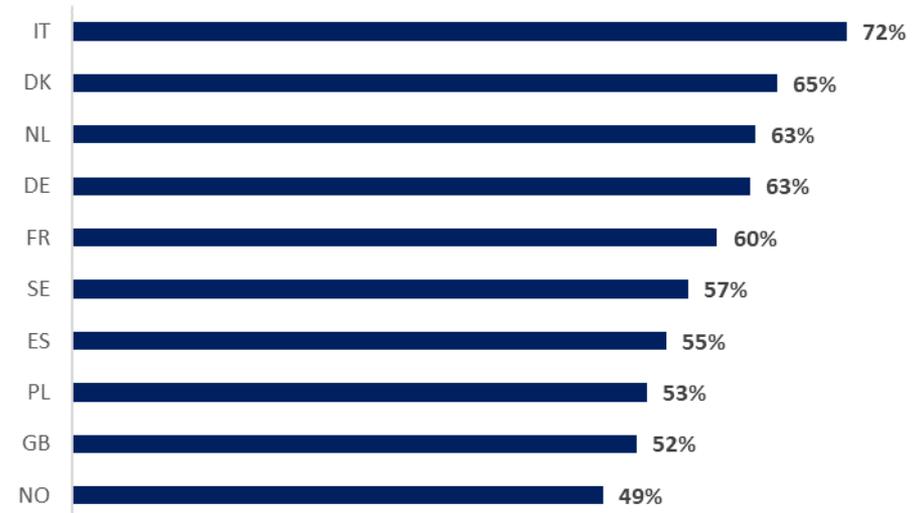
59% of TV films and fiction series directors have also directed a theatrical film.

- The share significantly varies between countries of production: from 49% in Norway to 72% in Italy.

Share of 2015-2022 directors of AV fiction present in the LUMIERE database

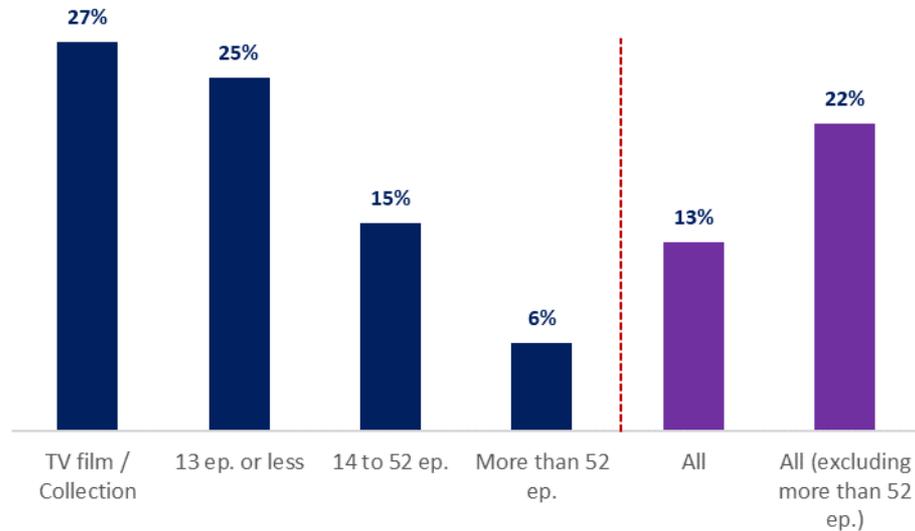


Share of 2015-2022 directors of AV fiction present in the LUMIERE database in selected countries



Directors were also credited as screenwriters (or as one of the screenwriters) for 27% of TV films and 25% of episodes of series with 13-episodes-or-less-per-season.

Share of episodes with at least one director also credited as screenwriter, by format (2015-2022)



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