

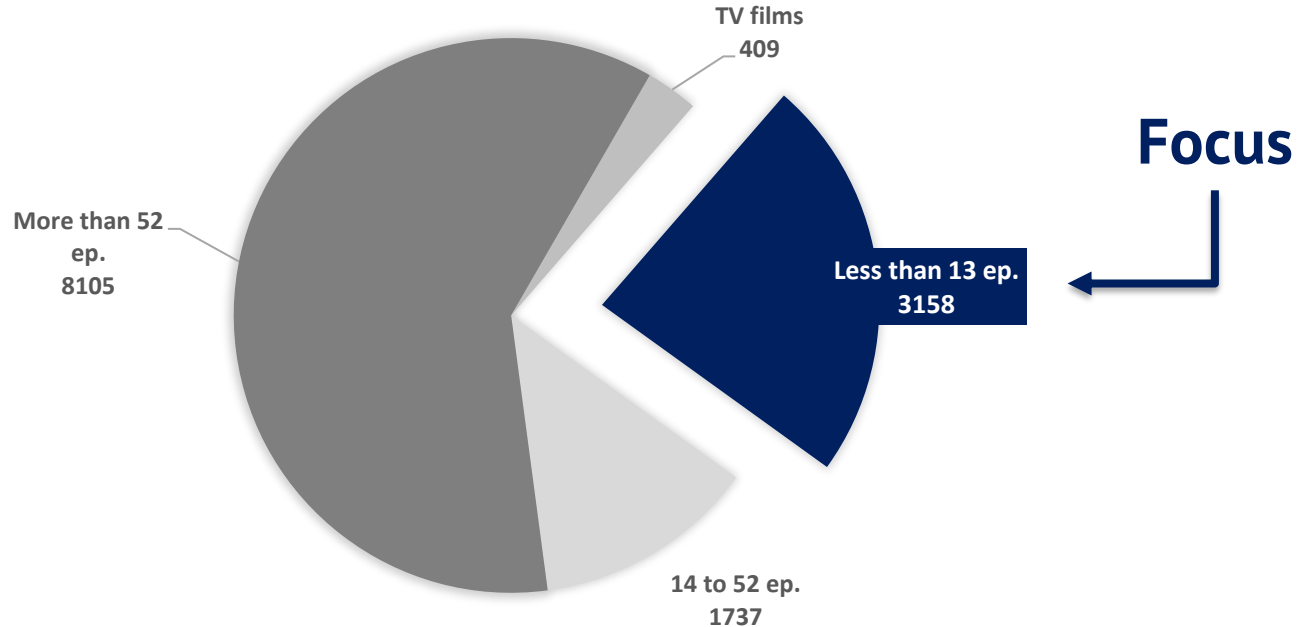
TV fiction production in Europe

Gilles Fontaine

Head of the Observatory's Department
for Market Information

Over 11 000 fiction hours per year

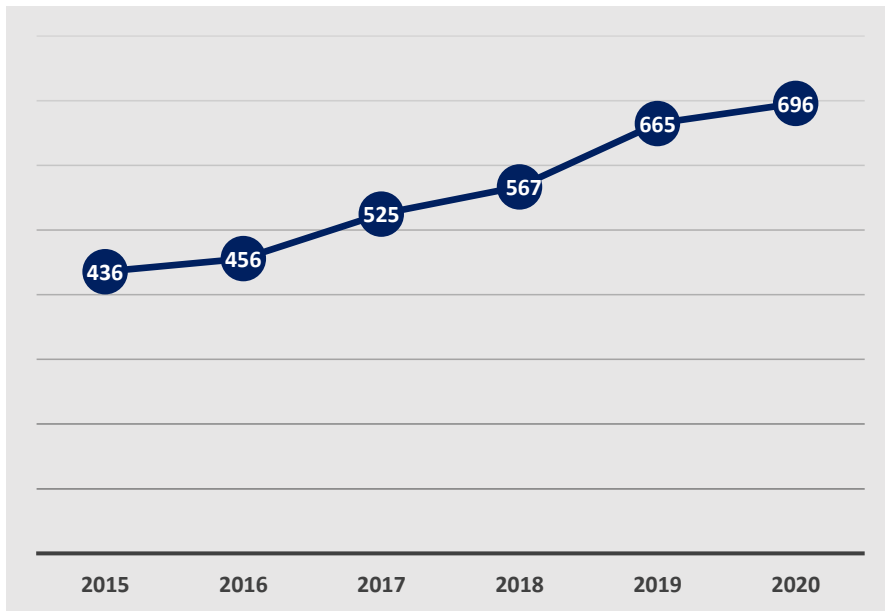
Soaps+Telenovelas= 60%



BREAKDOWN OF EUROPEAN TV FICTION HOURS BY FORMAT (AVERAGE 2015-2020)

Close to 700 seasons per year

Strong upward trend, slowed down by COVID



NUMBER OF LESS-THAN-13-EPIISODES TV FICTION SEASONS

Large turnover

54%

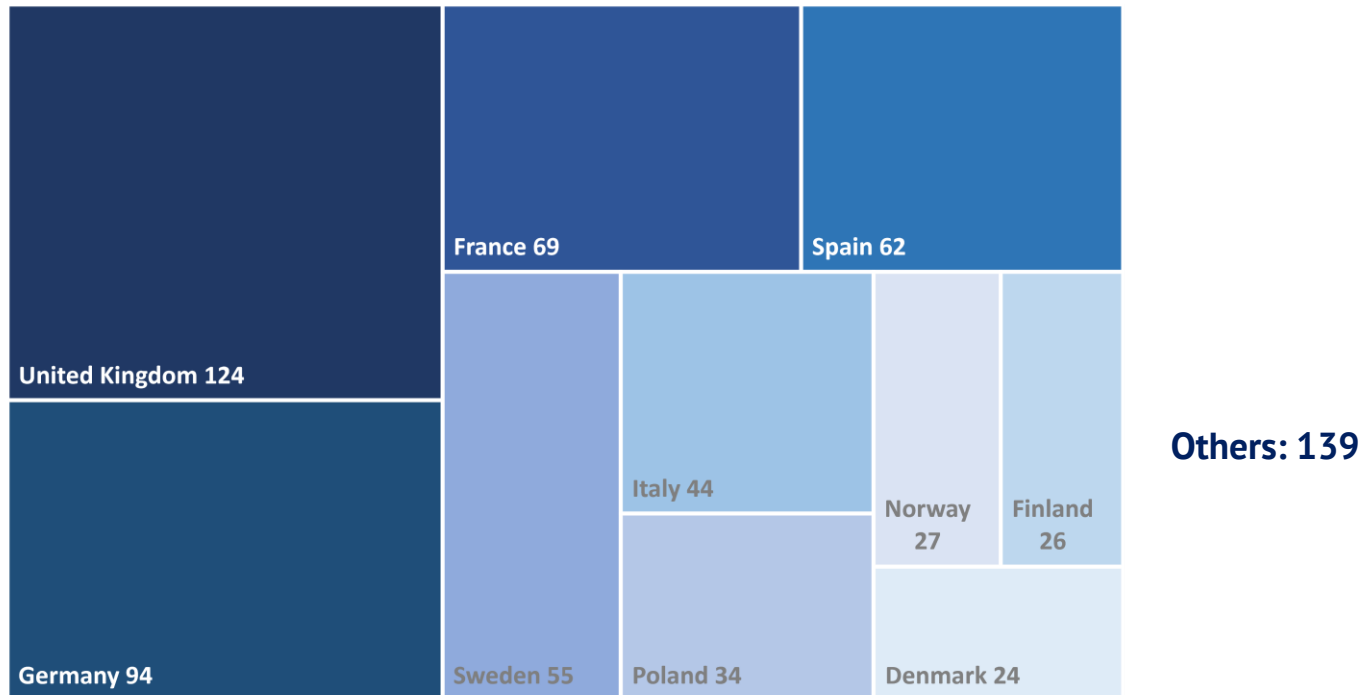
first seasons

SHARE OF FIRST SEASONS - AVERAGE 2015-2020

Trend

Origin

UK and Germany lead Strong presence of Scandinavia in the top 10

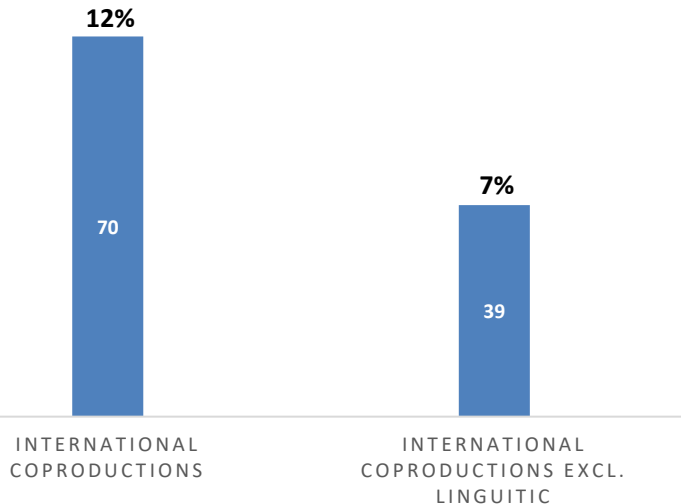


TOP 10 LESS-THAN-13-EPIISODES SEASONS PRODUCTION COUNTRIES (2020)

FEW COPRODUCTIONS BUT PROBABLY OTHER PATTERNS

About 70 international coproductions a year

Majority linguistic



NUMBER AND % OF LESS-THAN-13-EPIISODES TV SEASONS INTERNATIONAL COPRODUCTIONS (AVERAGE 2015-2020)

Intra-groups “partnerships”



International

PSBs account for 50% of seasons commissioned

Global streamers for 10%

Commissioners



BREAKDOWN OF LESS-THAN-13-EPISODES TV SEASONS BY CATEGORY OF MAIN COMMISSIONER (IN TITLES, 2020)

A rush to critical size

Producers

Group	Dependent productions	Independent productions	Total
BANIJAY GROUP		37	37
ITV	6	25	31
MEDIAWAN/LEONINE		26	26
RTL GROUP	2	22	24
ARD	20	2	22
BBC	12	1	13
DISCOVERY INC / MALONE		11	11
WARNER MEDIA	1	10	11
VIVENDI	2	7	9
ZDF	8		8

TOP 10 LESS-THAN-13-EPIISODES TV SEASONS PRODUCERS (TITLES, 2020)

INDEPENDENT PRODUCTION GROUP (WITH NO MAJOR INTEREST IN BROADCASTING)

BROADCASTERS SUBSIDIARY WORKING FOR 3rd PARTY BROADCASTERS AND VOD SERVICES

INTEGRATED PUBLIC SERVICE BROADCASTER'S PRODUCTION GROUP

300 active
companies/groups in
2020

Top 10:
29% of TV seasons