



The production and circulation of TV fiction in the EU28 Television and VOD

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The production and circulation of TV fiction in the EU28 - Television and VOD

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The production and circulation of TV fiction in the EU28

Television and VOD

Gilles Fontaine
Marta Jimenez Pumares



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KEY FINDINGS



PRODUCTION OF TV FICTION IN THE EUROPEAN UNION

Over 960 titles and 12 000 hours

Over 960 titles and 12 000 hours of TV fiction were produced in the European Union in 2017¹. TV series with more than 13 episodes represent the vast majority of the volume produced, due to the weight of daily soaps and telenovelas.

436 **3-13 episode** high-end TV series titles were produced, with 235 of them (54%) new projects and the remaining ones new seasons of returning titles.

Countries' preferences for formats impact level of production

The production of TV fiction is obviously driven by the demand of national broadcasters. Some countries focus mainly on long-running soaps or telenovelas. Others countries provide a significant platform to TV films. And some countries produce mainly high-end **3-13 episode** TV series.

All formats included, the main TV fiction-producing countries (Germany, Portugal, Poland, Spain and United Kingdom) are therefore not necessarily the largest television markets. However, when considering the 3-13 episode TV series, the United Kingdom, Germany, France, Italy and Spain are the largest producers in terms of hours². And Germany is by far the main producer of TV films.

Few international co-productions

There are almost no co-productions for the long-running daily soaps and telenovelas, which are tailored to one individual market. But the share of co-productions (9% in number of titles and hours) appears to be low also for 3-13 episode TV series, when compared with films³. The vast majority of high-end TV series are conceived to maximise the audience of one broadcaster in one country. Co-production is probably still seen as a risk to the domestic audience through dilution of the national characteristics of the programme⁴.

Co-productions in most cases unsurprisingly follow a 'language pattern': Germany and Austria; France and Belgium; the United Kingdom and the United States. However, Sweden appears to be the country most geared towards co-production, and with the largest diversity of partners.

¹ EU28 excluding Cyprus, Estonia, Latvia, Lithuania, Luxembourg and Malta.

² Of note is the fact that, in terms of number of titles, Sweden, Poland and the Netherlands produce more titles than Spain and Italy.

³ 22% for fiction feature films.

⁴ Recent moves show an increasing willingness of broadcasters to invest more in co-productions.



Public broadcasters play leading role for high-end TV series

Private broadcasters lead the production of TV fiction, all formats considered, as they tend, on average, to favour longer-running soaps and telenovelas⁵. Public broadcasters, in turn, originated more **3-13 episode** TV series.

Even if the production volume of original TV fiction by subscription video-on-demand (SVOD) services is expanding rapidly, it still only represented 4% of the titles and hours of high-end TV series in 2017.

Integration or independence of production

The top 20 producers of TV fiction comprise, on the one hand, broadcasters and their subsidiaries (e.g. ARD, RTL, ITV, BBC), and on the other, production groups with no direct activity in the broadcasting segment (e.g. EndemolShine, Mediawan, All3Media, Lagardère). These top 20 groups account for 58% of the total hours produced.

TV FICTION ON TELEVISION IN THE EUROPEAN UNION

58% of titles broadcast at least once are from EU28.

A total of 6 517 different TV series and TV films were broadcast by at least one television channel out of the sample during 2017. And 58% of these titles originated from the EU28. Among the EU28 titles, the runaway main country of production was Germany.

US and UK TV fiction travel best

TV fiction titles tend to be broadcast in the same year in a relatively low number of countries. On average, a given title was found in 1.5 countries⁶. The number of countries of presence is somewhat higher for US TV fiction titles: 15 out of 21 titles found in at least 10 different countries were of US origin.

Among EU28 titles, UK productions were available in the largest number of countries: 18 out of 21 TV fiction programmes present in at least seven countries were produced or co-produced by the United Kingdom. Of note is the relatively high level of circulation of TV fiction titles from Denmark and Sweden.

⁵ There are of course many exceptions: Private broadcasters RTL Group, Mediaset, RTL Group, ITV, Sky, and TF1, among others, are strongly active in the production of high-end TV series. And public broadcasters RTVE, ARD, TVP, BBC, RTP, among others, broadcast daily soaps or telenovelas.

⁶ Whatever the season broadcasted in the different countries.



Low number of co-productions

Only 5.6% of TV fiction broadcast at least once was co-produced. A total of 41% of these were intra-European co-productions. The US, Canada and Germany, were the countries most-involved in co-productions.

On average, TV fiction co-productions circulate, to a certain extent, more than 100% national productions. However, co-productions have less of an impact on circulation than, notably, the country of origin or the language of the TV fiction.

45% of TV fiction hours broadcast are of EU 28 origin

EU28 TV fiction programmes account for 50% (in number of titles), 44% (in number of episodes) and 45% (in hours) of the total TV fiction broadcasts. The share of European⁷ TV fiction varies in the sample from less than 25% to more than 90%.

Public broadcasters tend to broadcast more European TV fiction than private broadcasters. The difference is particularly significant in terms of number of titles.

Germany, the United Kingdom and France are main exporters of TV fiction

Germany appears to be the leading exporter in terms of titles, whereas TV fiction from the UK and France leads in terms of number of episodes and hours.

THE CIRCULATION OF TV FICTION ON VOD

25% of EU28 titles on SVOD, 40% on TVOD

In absolute terms, the United Kingdom is, by far, the country with the most EU28 available titles on **SVOD**. Its 2 841 titles are almost twice the volume of next-in-line Germany, with 1 605 titles. As for transactional video-on-demand (TVOD), France (2 254 titles), the United Kingdom (2 101 titles) and Germany (2 085 titles) have, by a significant margin, the the most sizable cumulated catalogues.

EU28 titles account for 25% of the cumulated number of TV fiction titles available on **SVOD** (varying between countries from 19% to 35%), but for 40% on **TVOD** (varying between countries from 7% to 55%).

A total of 76% of EU 28 titles available on **SVOD** and **TVOD** are 3-13 episode TV series.

⁷ EU28 + other European countries that are members of the European Audiovisual Observatory.



TVOD is more national, SVOD more European non-national

Among European works, the respective share of national and non-national titles strongly differs between **SVOD** and **TVOD**: European non-national titles account for 82% of all European titles on **SVOD**, but for only 38% on **TVOD**. The gap can be attributed to the strong weight of Netflix in the **SVOD** sample, and its policy of purchasing pan-European rights.

High-end TV series travel better

The large majority of European non-national titles are 3-13 episode TV series (77% for **SVOD**, 80% for **TVOD**) - confirmation that high-end drama is the format that travels best.

Netflix SVOD circulation

On average, a TV fiction programme is available on **TVOD** in two territories and in 6.2 territories on **SVOD**. The higher figure for SVOD directly results from the weight of Netflix in the sample.

Still, almost half of EU non-national titles are available in only one country.

UK by far the main exporter of TV fiction

The United Kingdom is the primary country of origin of non-national European fiction, both on **SVOD** and **TVOD**, and both in terms of unique (number of different TV fiction titles exported at least once) and cumulated (number of exports of TV fiction titles) titles.

France and Germany are the two other main exporters for **SVOD** and **TVOD**, however at a distance from the UK. Other significant exporters include Sweden, Italy, Denmark, Spain and Ireland.

Few co-productions available, but they travel slightly better

Co-productions account for only 11.6% and 13.9% of all titles available on **SVOD** and **TVOD**, respectively. The figures are slightly higher for EU28 titles (15.3% and 17.6%).

Co-productions circulate marginally better than 100% national titles, both on **SVOD** and **TVOD**. They also travel slightly better beyond the co-producing countries. Co-productions involving a non-EU28 country tend to circulate better than co-productions involving only EU28 countries.





THE PRODUCTION OF TV FICTION IN THE EUROPEAN UNION



1 Methodology

This section is the 2nd edition of the analysis of the production of TV fiction in Europe.

1.1 Source of the data

The underlying data used in this report has been provided by Plurimedia/The European Metadata Group.

1.2 Definitions

What is TV fiction?

TV fiction is any kind of scripted programme made for television, with the exception of animation programmes. Please note that TV films are included but not films, i.e. a programme that has been released in cinemas in at least one European country.

How are episodes of a TV series accounted for?

When the broadcast of a TV series season overlaps between two years, all episodes for the season are accounted for in the year in which the first episode was broadcast.

What is the country of origin of a programme?

The country of origin of a programme is the country from which the funding of a programme originates. When the programme has been funded by several countries, the country of origin is the country providing the highest share of the funding. Please note that the country of origin of a programme from a funding point of view differs from the nationality of the programme from a legal point of view. For example, a TV series co-produced by a majority country and a minority country in the framework of an official co-production agreement may be regarded as being national by both countries. In this report, however, it will only be attributed to the majority country.

What is a co-production?

A co-production is a programme financed by at least two different countries.

What is a format?

The format of a TV fiction programme relates to the number of episodes produced in a given season. The following classification of formats is used in this report:



- 1-2 episodes
- 3-13 episodes
- 14-26 episodes
- 27-52 episodes
- More than 52 episodes

Please note that TV films belonging to collections (same concept by the same broadcaster and same production company⁸) have been treated as TV series. The number of titles produced by a given broadcaster may therefore be lower than if each TV film is considered as a separate title.

What is an independent production?

An independent production is a TV fiction programme produced by a production company not under the control of the broadcaster contributing to the programme. An independent production does not imply that the producing company retains any rights. TV fiction can be commissioned to an independent production company by a broadcaster that retains all the 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).

The identification of the company controlling the production company is based on various sources: the AMADEUS database, websites of the production company, desk research.

1.3 Analysis for all TV fiction plus a focus on 3- 13 Episode TV series

Throughout the report, the main figures are given for:

- All TV fiction.
- TV fiction series with 3-13 episodes. This type of TV fiction can be seen as high-end TV series.

⁸ Examples include the collection « La loi de... » (France 3/FIT Productions) or the collection « Rosamunde Pilcher » (ZDF/ORF/ FFP New Media).



1.4 Sample

A total of 122 services were analysed, and original TV fiction was found on 99 of them. These 99 services include:

- 92 TV channels (50 private and 42 public) from 22 European Union countries⁹.

Table 1. Sample for the analysis of TV fiction production

Country	Private	Public	Total
AT		2	2
BE	3	4	7
BG	2		2
CZ	2	2	4
DE	5	2	7
DK	1	3	4
ES	4	2	6
FI	2	2	4
FR	4	3	7
FR/DE ¹⁰		1	1
GB	4	4	8
GR	3		3
HR		1	1
HU	1	1	2
IE		2	2
IT	2	3	5
NL	4	3	7
PL	3	2	5
PT	2	2	4
RO	3		3
SE	1	2	3
SI	2		2
SK	2	1	3
Total	50	42	92

- 7 Subscription Video-On-Demand services:
 - CanalPlay (FR)
 - Maxdome (DE)
 - Netflix (EUR)
 - Amazon (EUR)
 - ViaPlay (Scandinavia)
 - CMore (Scandinavia)
 - Vod.pl (PL)

⁹ Countries not included in the sample: Cyprus, Estonia, Latvia, Lithuania, Luxembourg, Malta.

¹⁰ ARTE.



1.5 Continuity with previous editions of the report

Figures in this report may not be directly comparable with previous editions due to:

- differences in the sample of channels
- differences in the grouping of TV films into collections

1.6 Limits

- The sample may not be representative of the television channels in Europe. In particular, thematic channels are underrepresented.
- The identification of the country(ies) of origin of a programme may be difficult in some cases. Therefore, identifying co-productions may be also be challenging.
- The number of individual titles from a given broadcaster or a given producer may be lower than the figure in their own records, as collections of TV films may have been considered as TV series.
- The methodology chosen to account for a TV series, i.e. attributing all TV series season episodes to the year the first episode was broadcast may create cut-off effects between two consecutive years.
- The identification of the controlling company of a production company may prove difficult in some cases.



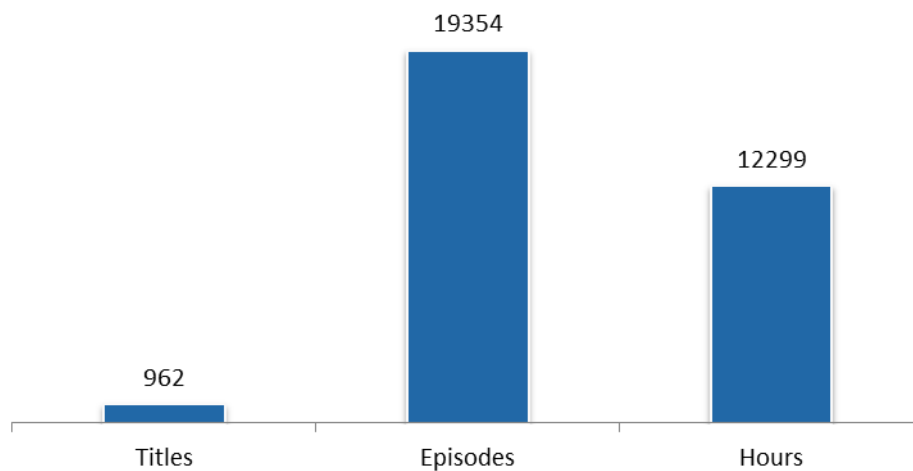


2 Volume and formats of TV fiction production

2.1 How much TV fiction is produced?

The production volume of TV fiction in the 22 European Union countries included in the sample can be estimated at 962 titles, over 19 000 episodes and 12 000 hours.

Figure 1. Volume of TV fiction production - 2017



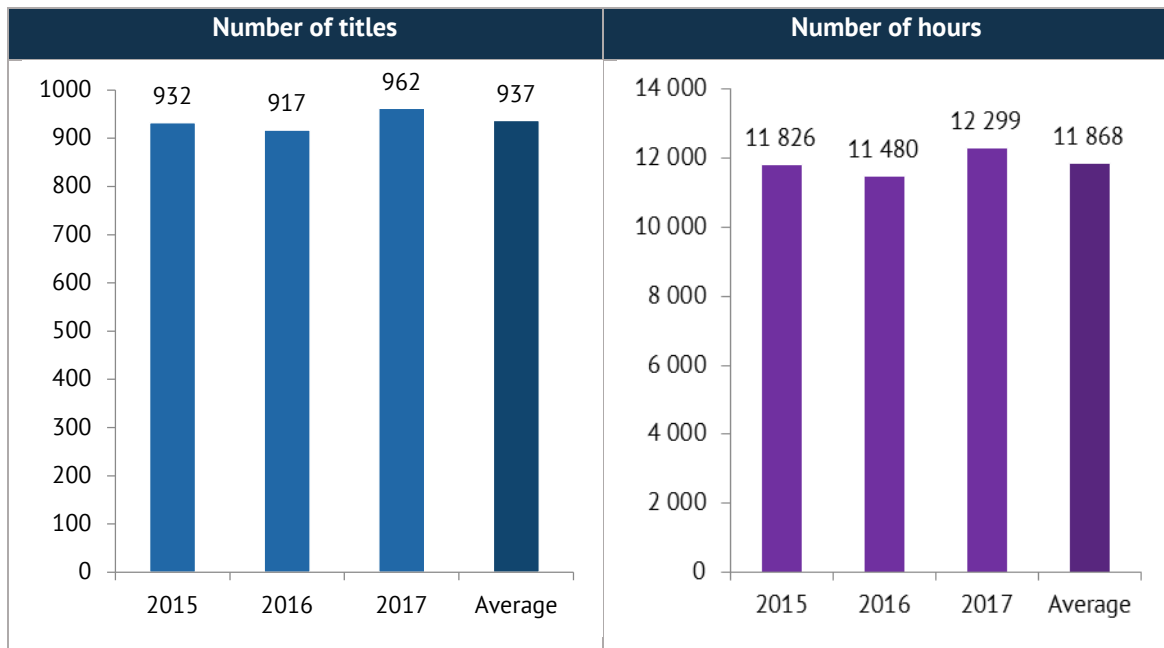
Source: European Audiovisual Observatory

The figures for 2017 are in line with the ones collected previously for the years 2016 and 2017. The 2016-2017 increase may likely be due to the cut-off effect linked to the methodology employed to account for TV series episodes¹¹.

¹¹ See section "Methodology".



Figure 2. Volume of TV production – Comparison 2015, 2016 and 2017¹²



Source: European Audiovisual Observatory

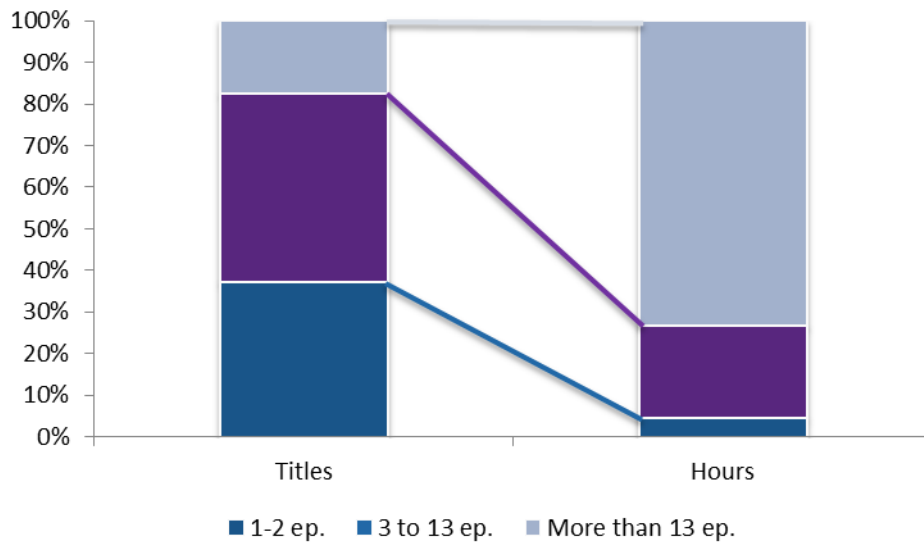
2.2 Which formats are produced?

TV films (1 or 2 episodes) and TV series with **3-13 episodes** account for 82% of all titles produced. But TV series with more than 13 episodes account for 73% of all hours produced.

¹² Figures for 2015 and 2016 have been restated to be comparable with 2017.



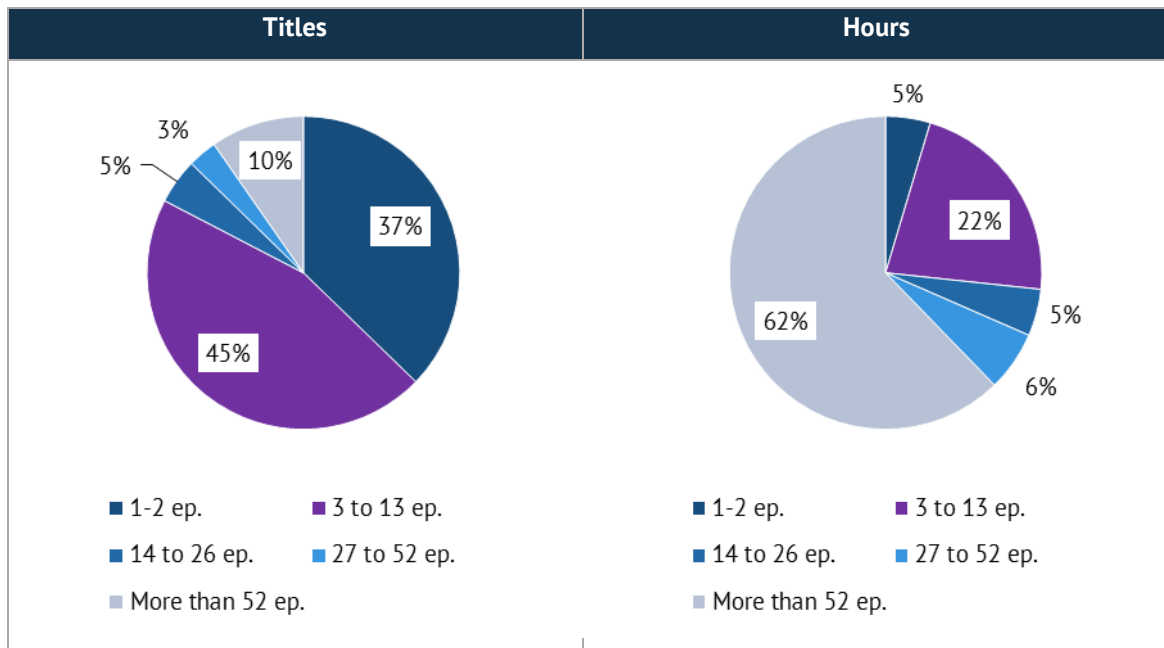
Figure 3. Comparison of formats by share of titles and share of hours produced - 2017



Source: European Audiovisual Observatory

TV series of **3-13 episodes**, which can be regarded as high-end TV series, account for 45% of all titles and 22% of all hours.

Figure 4. Breakdown of TV fiction production by format - 2017

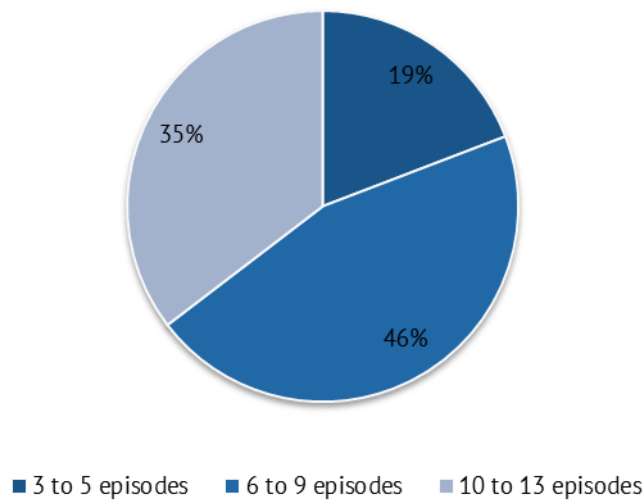


Source: European Audiovisual Observatory

Within the category of TV series of **3-13 episodes**, close to half of the projects have 6-9 episodes.



Figure 5. Breakdown by number of episodes of 3-13 episode TV series - 2017



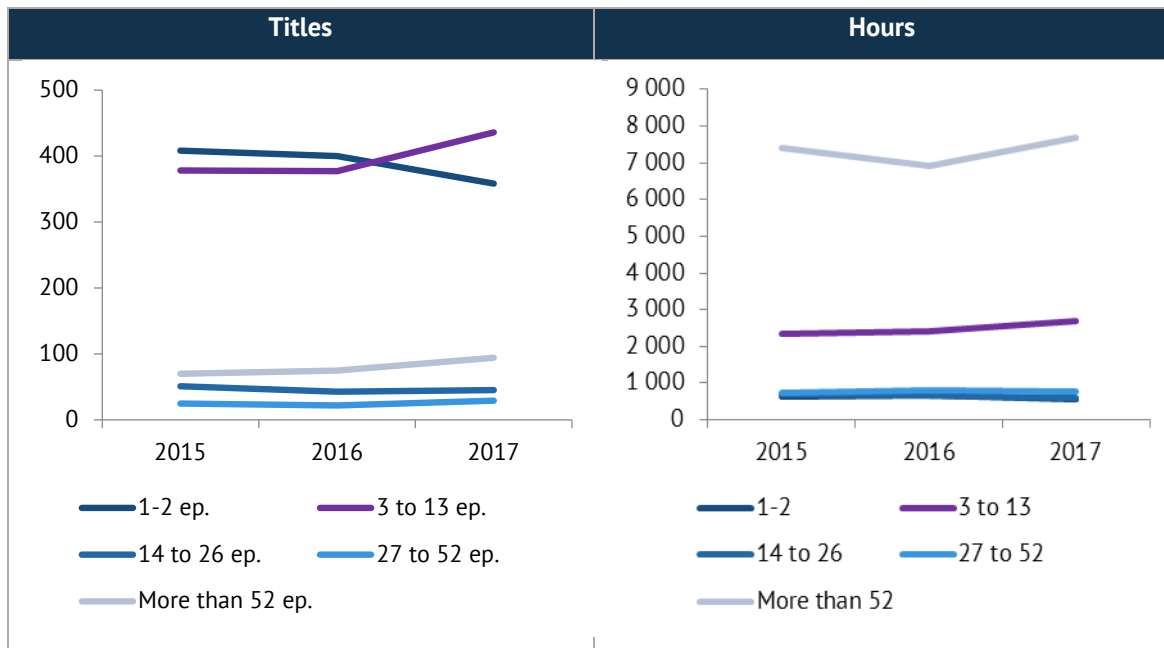
Source: European Audiovisual Observatory

Even if the variations between years can be distorted by cut-off effects¹³, figures suggest that a transfer of TV fiction projects from TV film to TV series may be taking place, probably to increase the international sales potential of the projects. The number of long-running soaps and telenovelas (more than 52 episodes per year) also appears to be increasing, while TV series with 14-52 episodes are decreasing. This could be due to the willingness of broadcasters to increase the number of daily (mostly daytime) shows, to better retain their audiences.

¹³ See section "Methodology".



Figure 6. Breakdown by format – Comparison 2015, 2016 and 2017¹⁴



Source: European Audiovisual Observatory

2.3 What is the share of new TV series?

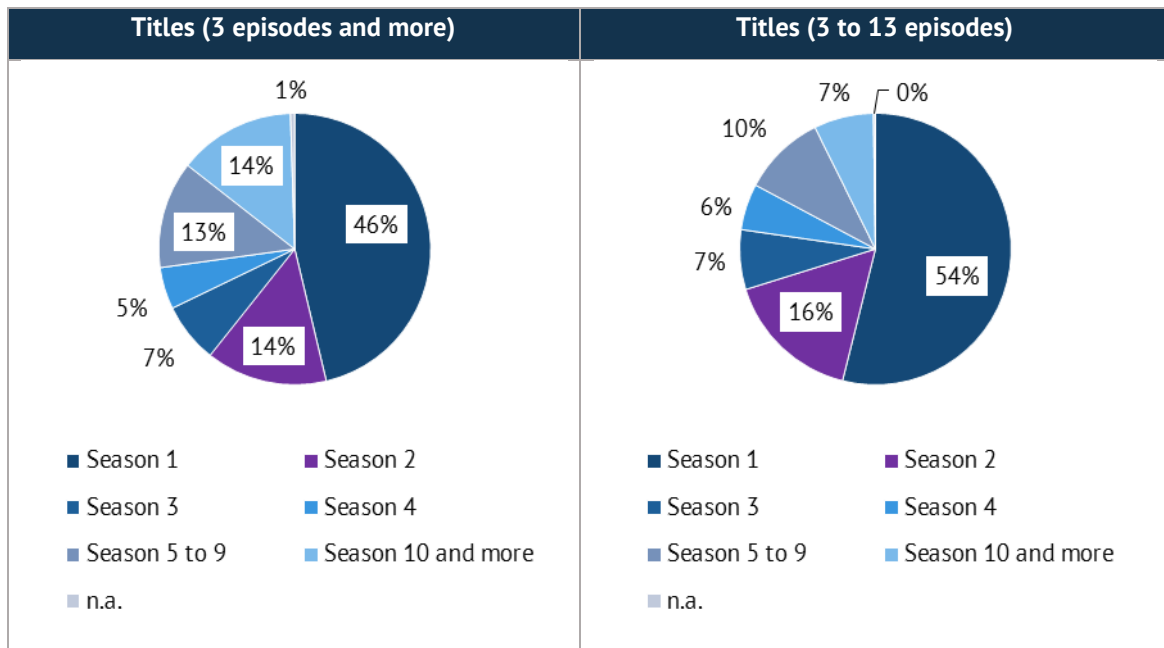
The majority of TV fiction programmes produced in 2017 was revolving projects¹⁵. For **3-13 episode** TV series, 235 out of 436 programmes were new projects, and the remaining ones were new seasons of existing titles.

¹⁴ Figures for 2015 and 2016 have been restated to be comparable with 2017.

¹⁵ Excluding TV films.



Figure 7. Breakdown of TV series by season - 2017



Source: European Audiovisual Observatory

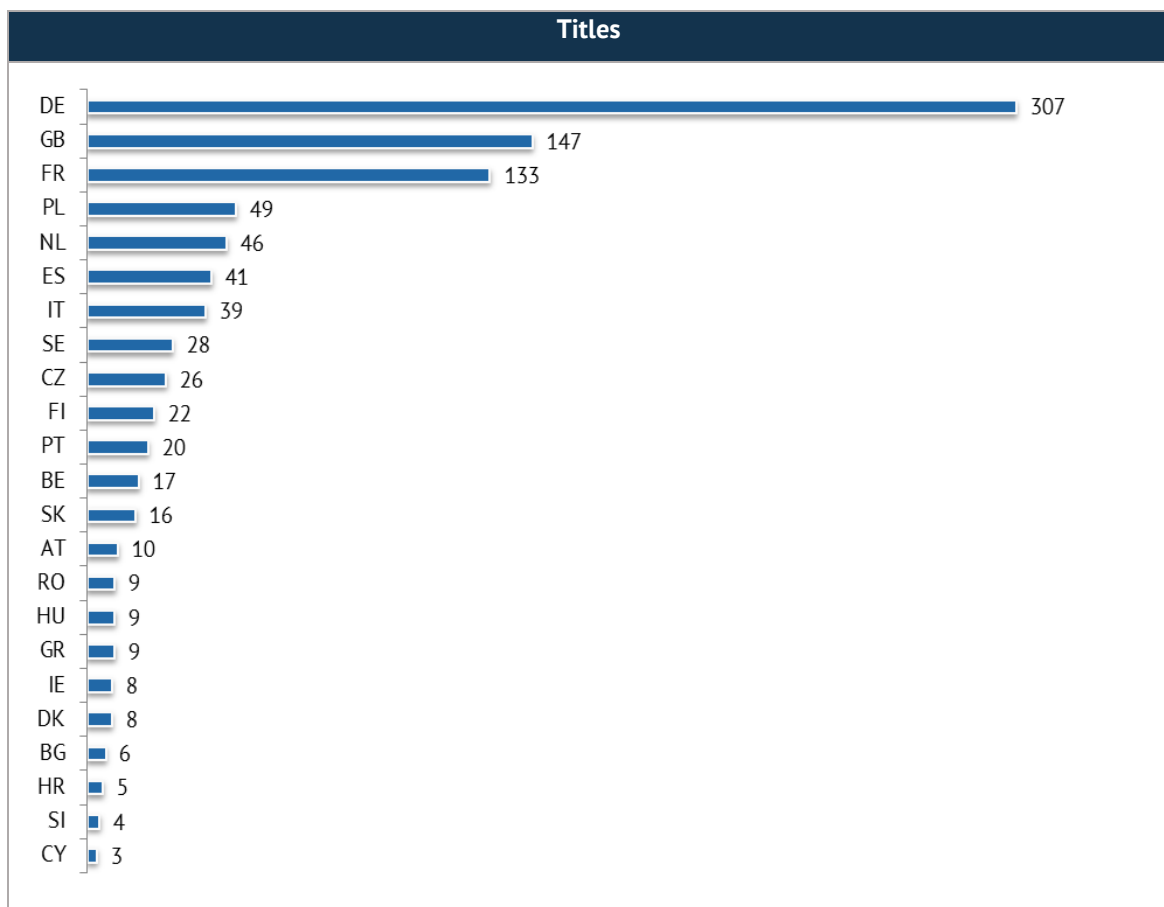


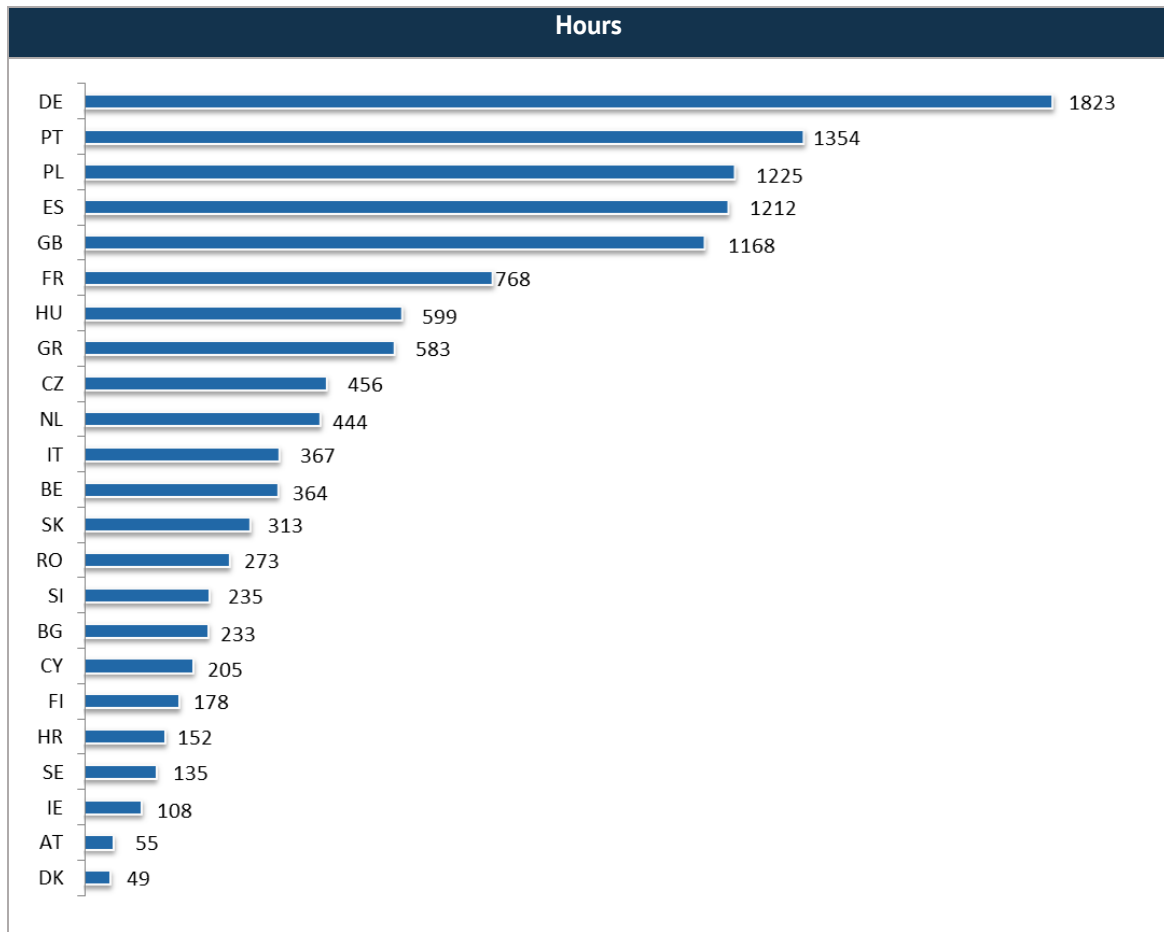
3 Origin of TV fiction

3.1 Which countries produce TV fiction?

All formats considered, Germany is the runaway lead TV-producing country, in terms of number of titles and number of hours. The largest countries are not necessarily among the top producing countries: the Netherlands, for instance, produced more original titles in 2017 than Spain or Italy. Portugal and Poland produced more original hours than Spain, the United Kingdom or France.

Figure 8. TV fiction titles by country of production (all formats) - 2017





Source: European Audiovisual Observatory

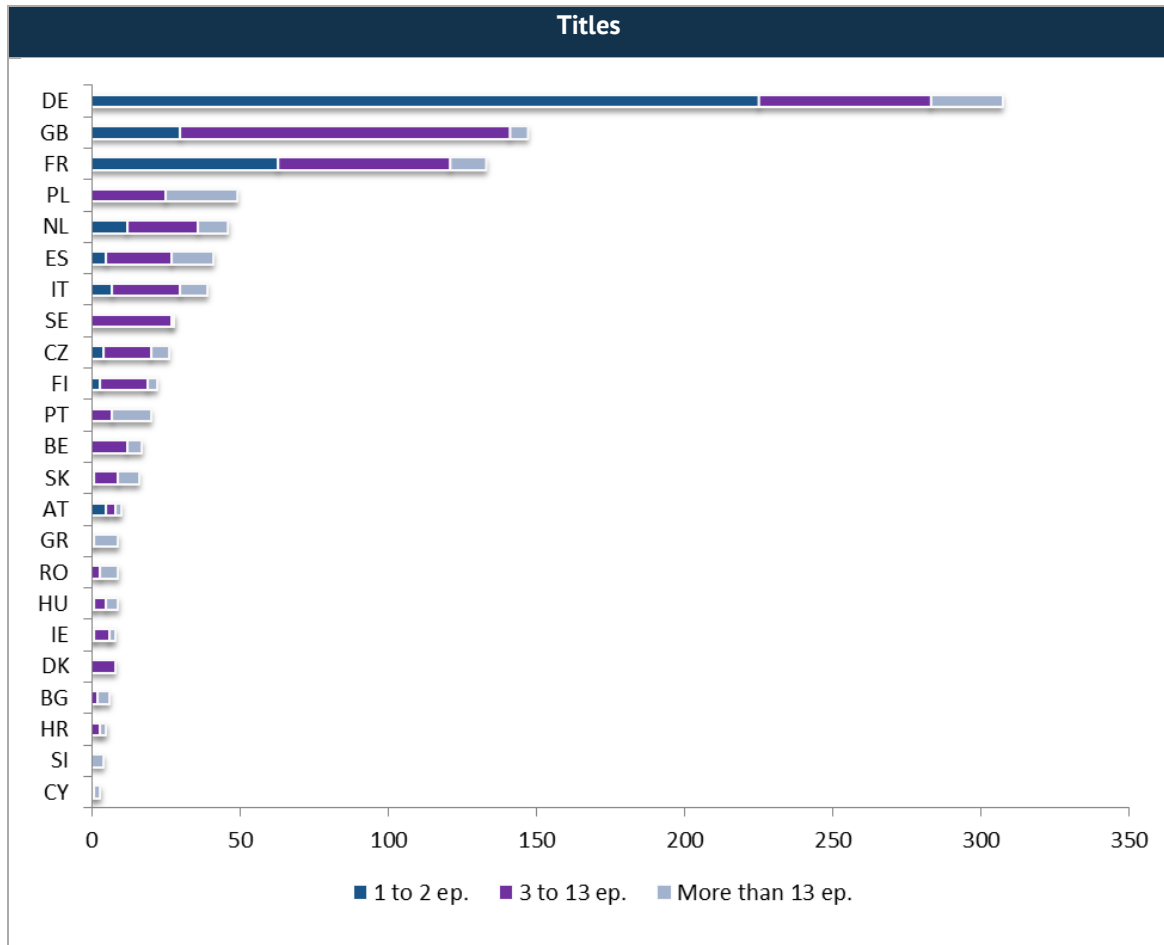
3.2 Do countries focus on the same formats?

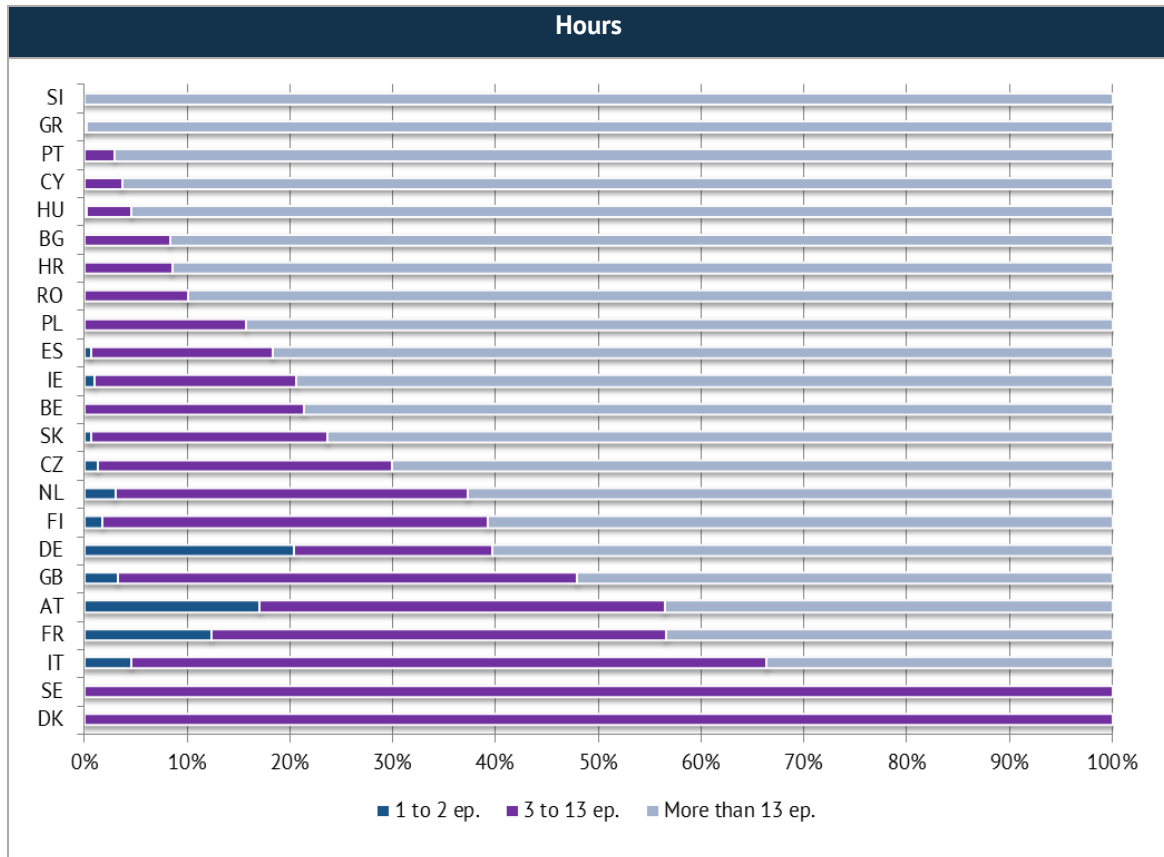
The volume of production of TV fiction is strongly determined by the formats the countries focus on. Some countries focus mainly on long-running soaps or telenovelas (Slovenia, Greece, Romania, Bulgaria, Cyprus and Portugal). Others offer a significant platform to TV films (Germany and, to a lesser extent, Austria and France). Finally, some countries produce mainly high-end **3-13 episode** TV series (Denmark, Sweden, the United Kingdom, Finland and Belgium).

In terms of volume of production, TV series with more than 13 episodes account for at least 50% of the total production volume in 18 of the 22 countries of the sample (the exceptions being Denmark, Sweden, Italy and France).



Figure 9. Breakdown of TV fiction titles by format and country of production - 2017





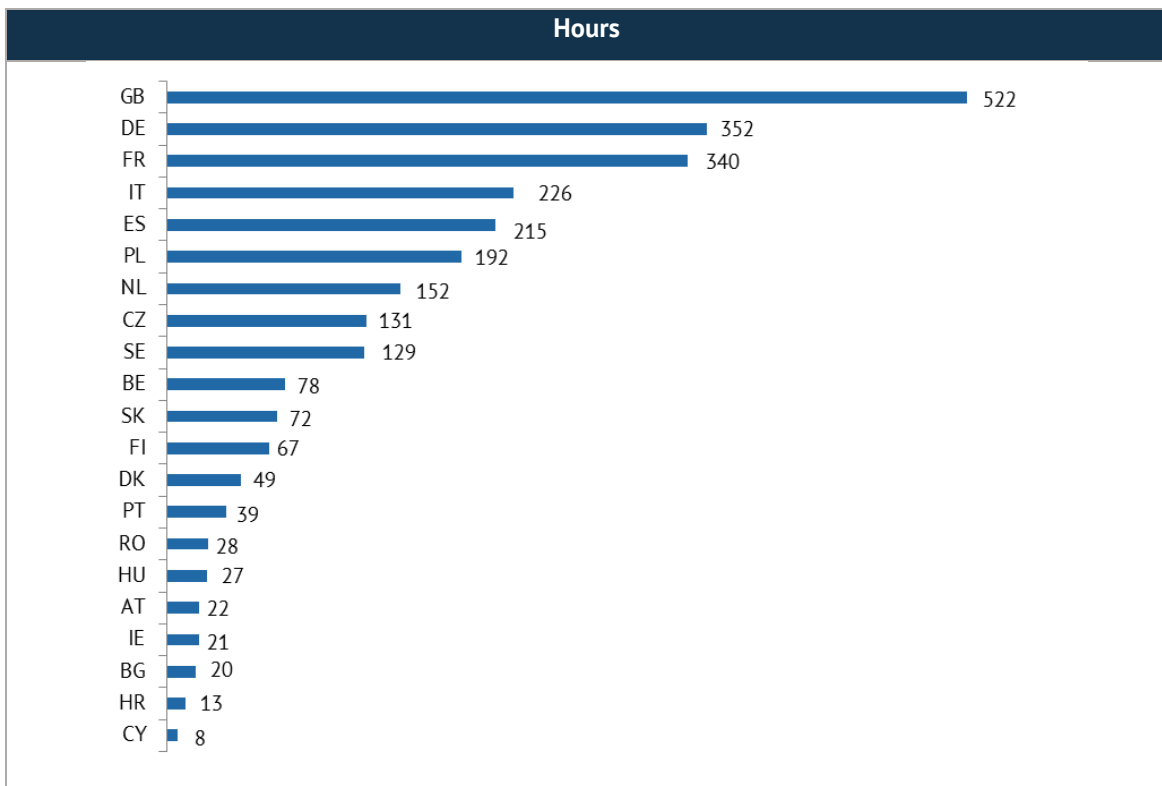
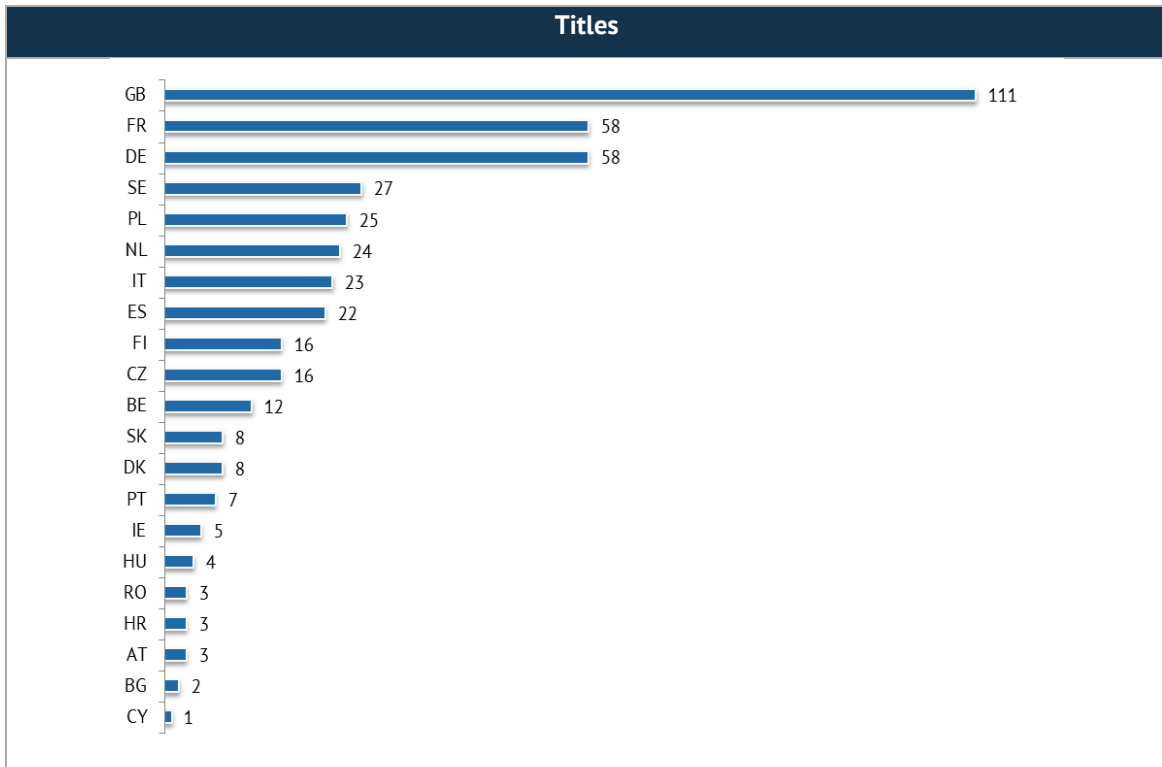
Source: European Audiovisual Observatory

3.3 Which countries produce most 3-13 episode TV series?

When considering only **3-13 episode** TV series, the United Kingdom leads both in terms of titles and hours. The other top producing countries are France, Germany, Sweden and Poland in terms of titles, and Germany, France, Italy and Spain in terms of hours.



Figure 10. TV fiction titles by country of production (3-13 episodes) - 2017



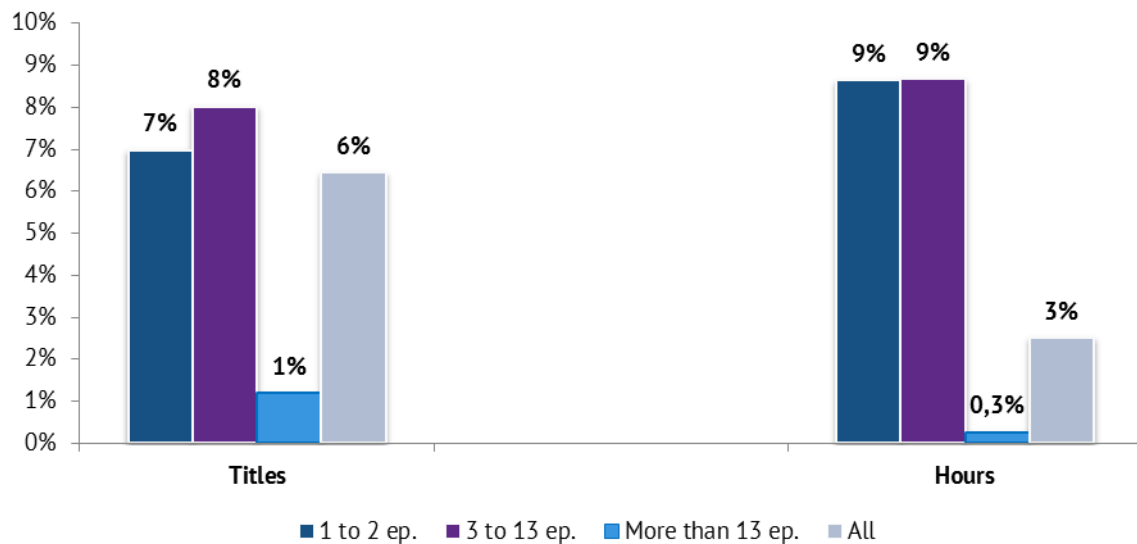
Source: European Audiovisual Observatory



3.4 How important are international co-productions?

The share of co-productions is much lower for TV fiction than for films. Only 9% of TV films and 9% of TV series with **3-13 episodes** are co-productions¹⁶.

Figure 11. Share of international co-productions by format - 2017



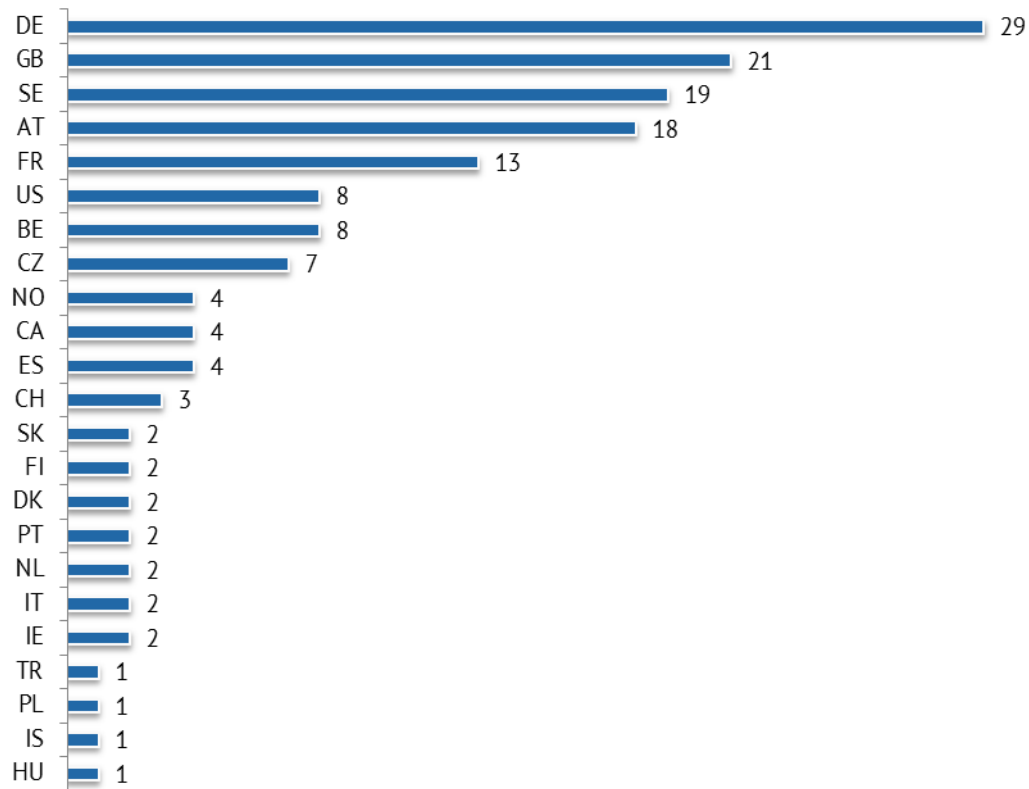
Source: European Audiovisual Observatory

Germany, the United Kingdom, Sweden, Austria and France are the most active countries in co-productions. However the diversity of co-producing partnerships varies: On the one hand, Germany is the main partner of Austria and Austria is the main partner of Germany, while France is the main partner of Belgium and Belgium is the main partner of France. But on the other, the partnerships are more diversified for the remaining principle co-producing countries. The United Kingdom significantly co-produces with the US, but also with Canada and Sweden. Sweden, taking into account its level of production, appears to be the country most geared towards co-production, in partnership with, among others, Germany, the United Kingdom and Norway.

¹⁶ To be compared with about 22% for fiction feature films.



Figure 12. Number of co-production interactions by country - 2017



Source: European Audiovisual Observatory

Table 2. Main co-production interactions - 2017

Country	Interactions	Number of countries with interaction	Main countries of interaction
DE	29	5	15 with AT, 5 with CZ, 4 with SE
GB	21	6	7 with US, 4 with SE, 3 with CA
SE	19	7	4 with DE, 4 with GB, 4 with NO
AT	18	4	15 with DE
FR	13	6	5 with BE, 3 with GB
BE	8	3	5 with FR
CZ	7	3	5 with DE
ES	4	3	2 with PT

Source: European Audiovisual Observatory

Exemplifying co-productions for TV series with **3-13 episodes**, the following table lists all co-productions for new projects (excluding returning TV series).

**Table 3. New international co-production TV series (3-13 episodes) launched in 2017**

Original title	Countries of origin	Production company
Like-Moi !	FR/BE/CH	Nexus Factory / RTS / RTBF / Umedia / Victoria Film Production
Taken	FR/US	FLW Films / Universal Television / Europacorp Television
Svet pod Hlavou	CZ/SK	Bionaut Films / Česká Televize / TV JOJ
The Worst Witch	GB/DE	CBBC In-House / ZDF
Das Verschwinden	DE/CZ	23/5 Filmproduktion GmbH / ARD Degeto Film / BR / Mia Film / NDR / SWR
Reinas	ES/GB	Indiana Pictures / Kulteperalia
Transferts	FR/BE	Panama Productions / Filmagine / BE-FILMS / ARTE
Electric Dreams	GB/US	Channel 4 Television Corporation / Sony Pictures Television
Riviera	GB/FR	Archery Pictures
Tin Star	GB/CA/US	Kudos Film and Television
Howards End	GB/US	Playground Entertainment / BBC/ Starz Originals / KippSter Entertainment / City Entertainment
Little Women	GB/US	British Broadcasting Corporation (BBC) / Masterpiece Theatre / Playground Entertainment
Kat and Alfie : Redwater	IE/GB	RTE / BBC / Element Pictures
La bouse	FR/BE	BE-FILMS / LOVEMYTV / MademoiselleFilms
The White Princess	GB/US	Company Pictures / Playground Entertainment / Starz!
Caminos de Irmadade	PT/ES	M International
Vidago Palace	PT/ES	HOP! / Portocabo
Hassel	SE/DE/BE	Nice Drama / Viaplay / Beta Film / Lunanime
Veni Vidi Vici	SE/DK/GB	HandsUp Sthlm Productions
Alex	SE/GB	SF Studios Production AB / Viaplay / Nevision / Film i Väst
Innan vi dör / Before we die	SE/DE/NO	B-Reel Films / SVT / ZDF / Filmregion Stockholm Mälardalen / Film Capital Stockholm / Motlys

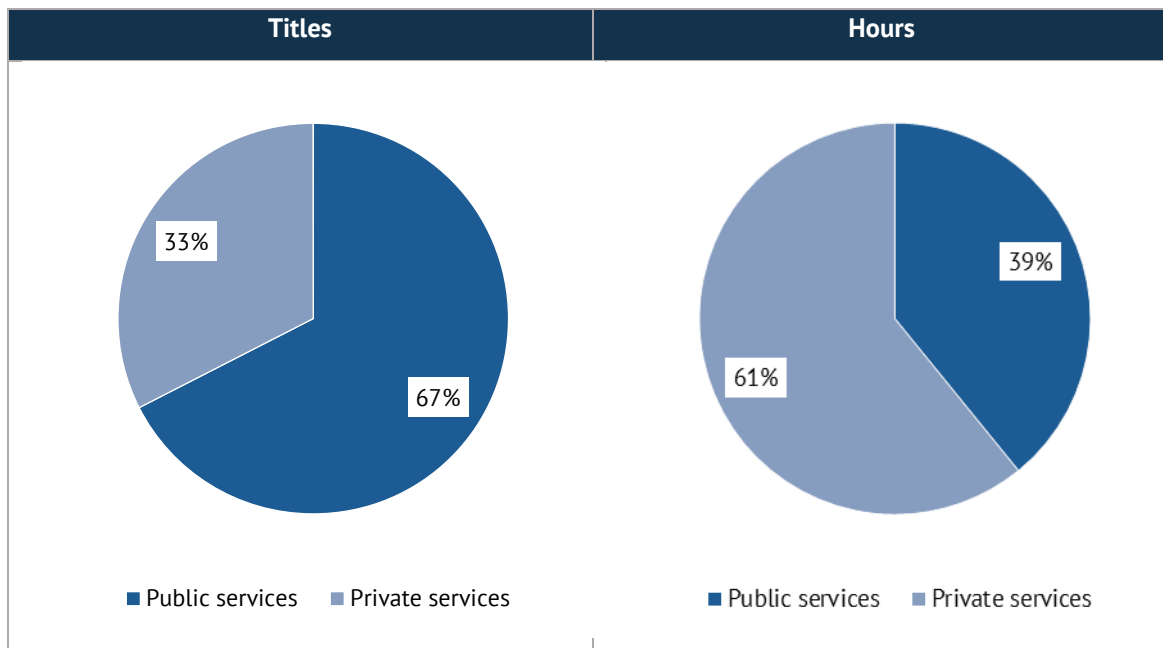
Source: European Audiovisual Observatory

4 Contribution of TV and SVOD services

4.1 How do public and private services contribute to the production of TV fiction?

Public service broadcasters originate about two-thirds of the TV fiction titles, but only two-fifths of the TV fiction hours. Private audiovisual services, statistically speaking, tend to favour longer-running soaps and telenovelas. Indeed, when considering only TV series with **3-13 episodes**, public broadcasters originate the majority of both titles and hours.

Figure 13. Breakdown of TV fiction production (all formats) between public and private services¹⁷

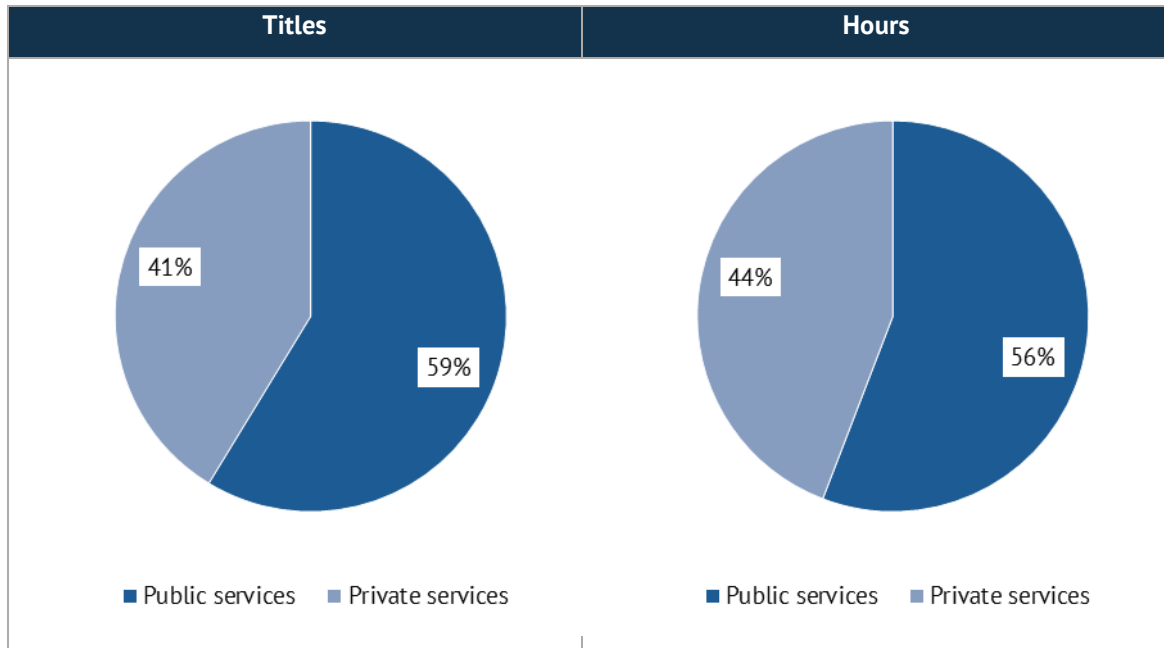


Source: European Audiovisual Observatory

¹⁷ Services include linear television and SVOD services.



Figure 14. Breakdown of TV fiction production (3-13 episodes) between public and private services¹⁸



Source: European Audiovisual Observatory

4.2 What is the share of SVOD in the production of TV fiction?

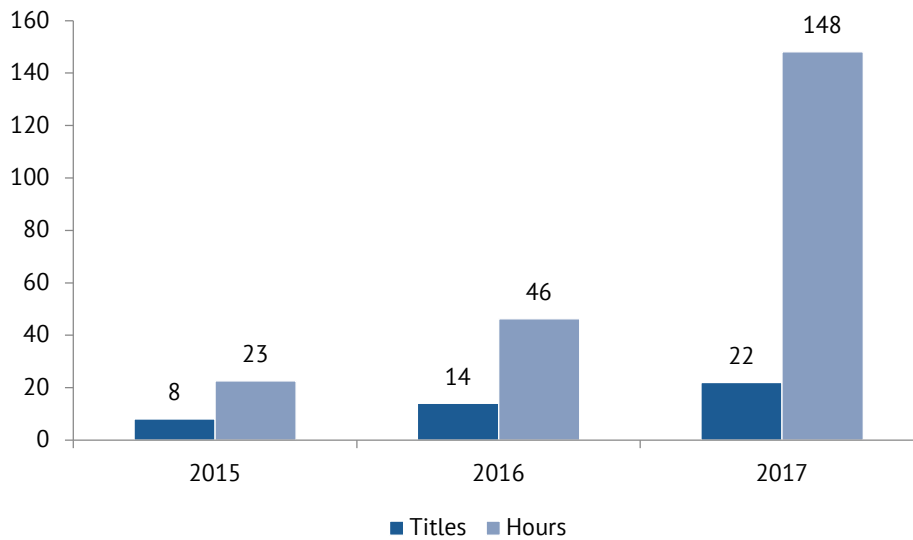
The volume of production of TV fiction by SVOD services has been constantly increasing in recent years. SVOD services mainly focus on TV series with **3-13 episodes**, accounting for about 4% of titles and hours in 2017¹⁹.

¹⁸ Services include linear television and SVOD services.

¹⁹ A TV series is considered as originated by an SVOD service when it has not been previously funded and broadcast by a broadcaster in at least one country. “La casa de papel”, for example, is, in the context of this report, attributed to the Spanish broadcaster Antena 3.



Figure 15. Volume of TV fiction production initiated by SVOD services (2015-2017)



Source: European Audiovisual Observatory

Table 4. SVOD services original TV fiction - 2017

Original title	Service	Country of origin	Production companies
Der Lack ist ab	Amazon	DE	Phantomfilm / 7NXT GmbH
You Are Wanted	Amazon	DE	Amazon Studios / Pantaleon Films / Warner Bros. International Television Production / Warner Bros.
Oasis	Amazon	GB	Reign Of Blood / Evolution Pictures / Reign of Blood
Gåsmannen	C More Play	SE	Amazon Studios / Left Bank Pictures
Torpederna	C More Play	SE	FLX
Modus	C More Play	SE	TV4 Sweden / Miso Film Sweden / Nadcon Film / Zweites Deutsches Fernsehen (ZDF) / TV2 Norge / TV2 Danmark / RUV / Lumière / Fremantle Media International
Aallonmuurtaja	C More Play	FI	Warner Bros International Television Production Finland
Farang	C More Play	SE	Dansu Productions / Eyeworks Sweden
Saknad	C More Play	SE	Sweetwater / BOB Film Sweden AB / C More / TV4 Sweden / Film i Väst
Eat Locals	CanalPlay	GB	Reign Of Blood / Evolution Pictures / Reign of Blood
Jerks	Maxdome	DE	Talpa Germany TV
Black Mirror	Netflix	GB	Zeppotron / Channel 4 Television Corporation / Gran Babieka
The Crown	Netflix	GB	Left Bank Pictures / Sony Pictures Television Production UK



Original title	Service	Country of origin	Production companies
Las chicas del cable	Netflix	ES	Bambú Producciones
Dark	Netflix	DE	Netflix / Wiedemann & Berg Television
Suburra : La serie	Netflix	IT	Cattleya
Black Widows	ViaPlay	DK	MTG / TV3 / Viaplay
Swedish Dicks	ViaPlay	SE	Brain Academy / Viking Brothers Entertainment
Hassel	ViaPlay	SE	Nice Drama / Viaplay / Beta Film / Lunanime
Veni Vidi Vici	ViaPlay	SE	HandsUp Sthlm Productions
Alex	ViaPlay	SE	SF Studios Production AB / Viaplay / Nevision / Film i Väst
Korona królów	VOD.pl	PL	Telewizja Polska

Source: European Audiovisual Observatory



5 The producers of TV fiction

5.1 Who are the main producers of TV fiction?

A total of 399 different production companies were identified as the main production company of a TV fiction project in 2017.

The top 20 producers of TV fiction combine broadcasters and their subsidiaries on the one hand, and production groups with no activity in the broadcasting segment on the other. These top 20 groups account for 58% of total hours produced.

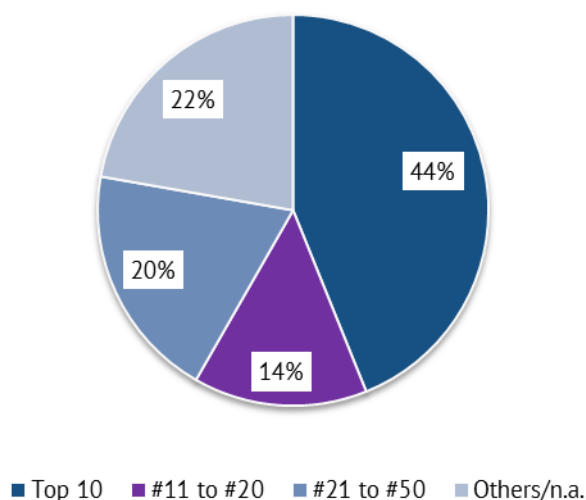
Table 5. Top 20 TV fiction producers - 2017 (all formats)

Titles			Hours		
1	ARD	78	1	RTL	1045
2	EndemolShine	37	2	ARD	843
3	RTL	34	3	Prisa	707
4	ITV	30	4	SP Televisão	584
5	BBC	25	5	EndemolShine	538
6	ZDF	24	6	ITV	456
7	Mediawan	14	7	CEME	401
8	All3Media (Discovery)	13	8	BBC	310
9	Lagardère	12	9	LAGARDERE	246
10	Ceská Televize	10	10	TVN	241
10	Sony	10	11	TF1	231
10	Tele Muenchen	10	12	J.K. Productions	210
10	TF1	10	13	Make It Productions	191
14	Banijay	9	14	Telewizja Polska	182
14	Beta Films	9	15	All3Media (Discovery)	177
14	Bonnier	9	16	Plano a Plano Producciones	176
14	CEME	9	17	Constantin Entertainment	161
14	JLA	9	18	Ceska Produkčni 2000 A.S.	150
19	YLE	8	19	ATM Grupa S.A.	143
20	Time Warner	7	20	Giorgos Karagiannis & Co.	140
20	Vivendi	7			

Source: European Audiovisual Observatory



Figure 16. Share of the top 10, top 20 and top 50 producers of hours (all formats) - 2017



Source: European Audiovisual Observatory

Regarding TV series with **3-13 episodes**, the top 20 players are less concentrated, accounting for 40% of hours produced. Proportionally more new 3-13 episode TV series are launched, with a need for the broadcasters to select projects from a variety of producers.

Table 6. Top 20 TV fiction producers - 2017 (3-13 episode TV series)

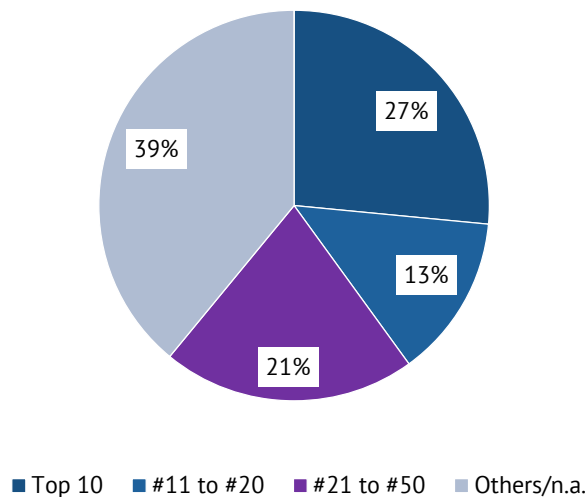
Titles			Hours		
1	ITV	22	1	ITV	136
2	EndemolShine	22	2	EndemolShine	135
3	RTL	15	3	RTL	97
3	BBC	15	4	BBC	69
5	Bonnier	9	5	ARD	55
6	ARD	8	6	Ceská Televize	46
7	Sony	7	6	Sony	46
8	Mediawan	6	8	Akson Studio	45
8	JLA	6	8	Mediaset	45
8	Ceská Televize	6	10	Mediawan	43
11	All3Media (Discovery)	6	11	Atresmedia Televisión	42
11	Vivendi	6	12	Bonnier	40
13	Banijay	5	13	ATM Grupa S.A.	38
13	ATM Grupa S.A.	5	13	Vivendi	38
13	Akson Studio	5	15	ZDF	36
13	TF1	5	15	TF1	36
13	Beta Films	5	17	JLA	35
13	ZDF	5	17	All3Media (Discovery)	35
19	Elephant	4	19	Neue Deutsche Filmgesellschaft	34
19	Mediaset	4	20	Banijay	31



Titles		Hours	
19	Time Warner	4	
19	LAGARDERE	4	
19	Neue Deutsche Filmgesellschaft	4	

Source: European Audiovisual Observatory

Figure 17. Share of the top 10, top 20 and top 50 producers of hours (3-13 episodes) - 2017



Source: European Audiovisual Observatory

5.2 Who are the main producers of ‘independent’ TV fiction?²⁰

In this section, we define “independent production” as TV fiction produced by a production company not under the control of the broadcaster contributing to the programme. An independent production does not imply that the producing company retains any rights. A TV fiction programme can be commissioned to an independent production company by a broadcaster that retains all the 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).

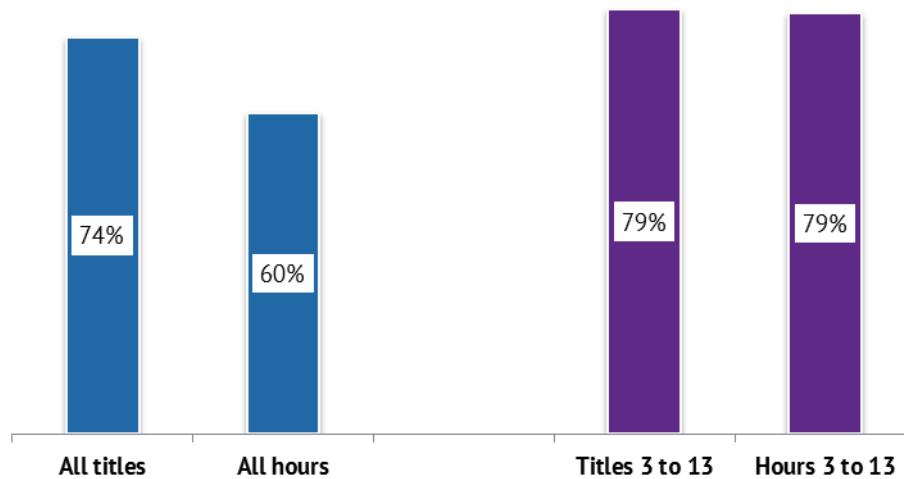
The vast majority of TV fiction titles (74%) and hours (60%) can be attributed to independent productions. The share of independent production is higher for **3-13 episode**

²⁰ See the definition of “independence” in the Methodology section.



TV series (79% for both titles and hours), since a portion of the long-running soaps or telenovelas are produced by the broadcasters.

Figure 18. Share of independent TV fiction production by format



Source: European Audiovisual Observatory

The production of independent TV fiction is relatively concentrated, with the top 20 players accounting for 31% of titles and 55% of hours.

Table 7. Top 20 independent TV fiction producers - 2017 (all formats)

Titles			Hours		
1	EndemolShine	37	1	SP Televisão	584
2	RTL	25	2	EndemolShine	538
3	ITV	19	3	ITV	272
4	Mediawan	14	4	Lagardère	246
5	All3Media (Discovery)	13	5	RTL	244
6	Lagardère	12	6	J.K. Productions	210
7	Sony	10	7	Make It Productions	191
7	Tele Muenchen	10	8	All3Media (Discovery)	177
9	Beta Films	9	9	Plano a Plano Producciones	176
9	Banijay	9	10	Constantin Entertainment	161
9	JLA	9	11	Ceska Produkčni 2000 A.S.	150
12	Vivendi	7	12	TF1	148
12	TF1	7	13	ATM Grupa S.A.	143
12	Time Warner	7	14	Giorgos Karagiannis & Co.	140
15	Lux Vide	6	15	Perfo Production	131
15	Bonnier	6	16	Tako Media	117
15	ATM Grupa S.A.	6	17	Dream Team Films	110
15	Spiegel	6	18	Artrama	106



Titles			Hours		
15	Ziegler Film	6	19	Mangart	104
20	Roughcut TV	5	20	JLA	100
20	Neue Deutsche Filmgesellschaft	5			
20	Elephant	5			
20	Ariane Krampe Filmproduktion	5			
20	Real Film Berlin	5			
20	Cinétévé	5			
20	Akson Studio	5			
20	Constantin Entertainment	5			
20	Kabo	5			

Source: European Audiovisual Observatory

The top 20 producers of independent-production, **3-13 episode** TV series accounted for 38% and 41% of all titles and hours, respectively.

Table 8. Top 20 independent TV fiction producers - 2017 (3-13 episodes)

Titles			Hours		
1	EndemolShine	22	1	EndemolShine	135
2	ITV	13	2	ITV	91
3	RTL	12	3	RTL	80
4	Sony	7	4	Sony	46
5	JLA	6	5	Akson Studio	45
5	Mediawan	6	6	Mediawan	43
5	Bonnier	6	7	ATM Grupa S.A.	38
5	All3Media (Discovery)	6	8	Vivendi	38
5	Vivendi	6	9	JLA	35
10	Banijay	5	9	All3Media (Discovery)	35
10	Akson Studio	5	11	Neue Deutsche Filmgesellschaft	34
10	Beta Films	5	12	Banijay	31
10	ATM Grupa S.A.	5	13	TF1	30
14	TF1	4	13	Atresmedia Televisión	30
14	Time Warner	4	15	Beta Films	28
14	Neue Deutsche Filmgesellschaft	4	16	Bonnier	27
14	Elephant	4	16	Time Warner	27
14	Lagardère	4	18	Lagardère	25
19	NBCUniversal	3	19	NBCUniversal	24
19	BOB Film Sweden AB	3	20	Elephant	23
19	Roughcut TV	3			
19	Tele Muenchen	3			
19	Cinétévé	3			
19	Avalon Television	3			

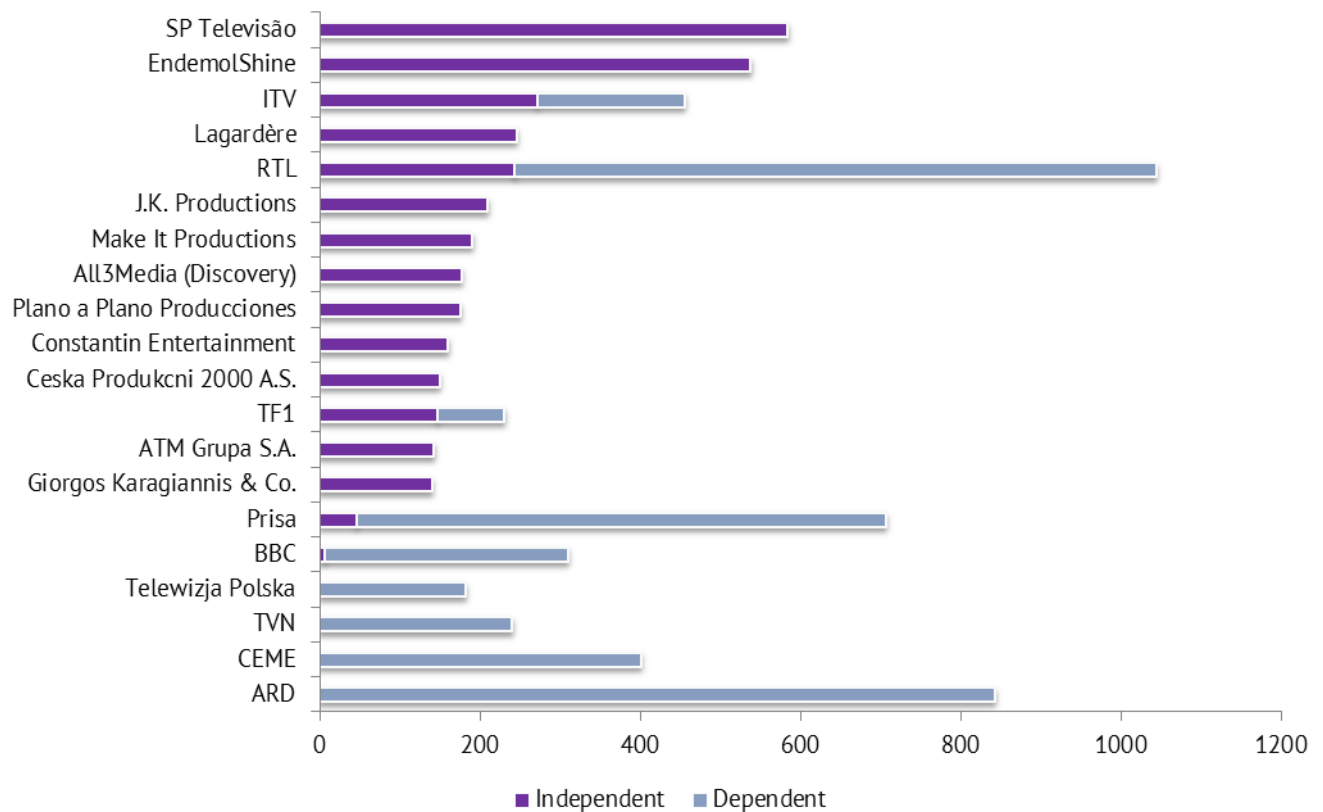
Source: European Audiovisual Observatory



The structure of the top 20 production groups can be loosely broken down into two forms:

- production companies with no involvement in broadcasting (e.g. SP Televisao, EndemolShine, Lagardère)
- broadcasters or broadcaster subsidiaries that may either work exclusively for their parent companies (e.g. BBC, Telewizja Polska, TVN), or produce, to a significant extent, for non-affiliated broadcasters (e.g. ITV, RTL, TF1).

Figure 19. Share of independent production attributable to the main TV fiction production groups - 2017 (hours)

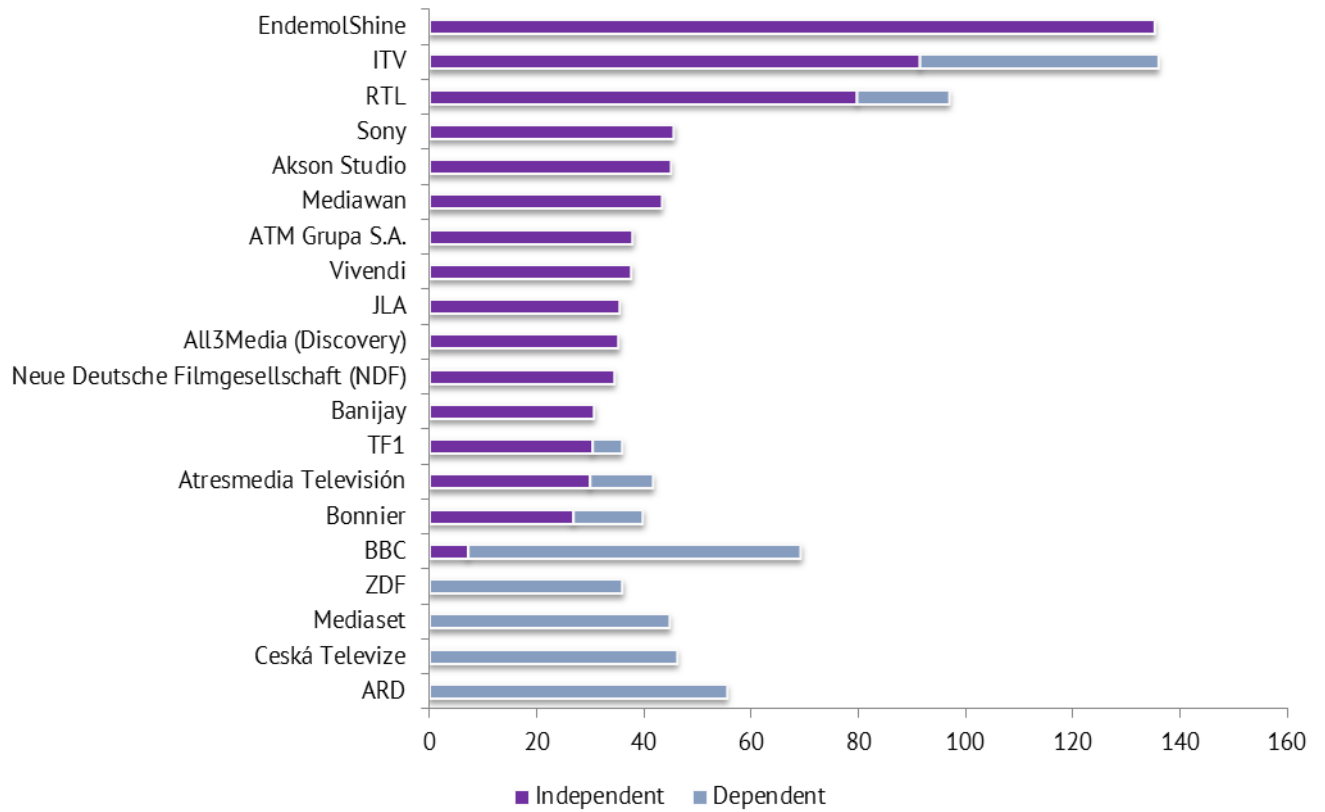


Source: European Audiovisual Observatory

Similarly, with regard to **3-13 episode TV series**, ITV, RTL, TF1 and Bonnier have managed to sell production projects to non-affiliated broadcasters.



Figure 20. Share of independent production attributable to the main 3-13 episode TV fiction production groups – 2017 (hours)



Source: European Audiovisual Observatory





TV FICTION ON TELEVISION IN THE EUROPEAN UNION



1 Methodology

This section is a first-time analysis of the origin of TV fiction broadcast by television channels in the European Union.

1.1 Source of the data

The underlying data used in this report was provided by Plurimedia/The European Metadata Group

1.2 Definitions

What is TV fiction?

TV fiction is any kind of scripted programme made for television, with the exception of animation programmes. Please note that TV films are included but not films, i.e. a programme which has been released in cinemas in at least one European country.

What is the country of origin of a programme?

The country of origin of a programme is the country from which the funding of a programme originates. When the programme has been funded by several countries, the country of origin is the country providing the highest share of the funding. Please note that the country of origin of a programme from a funding point of view differs from the nationality of the programme from a legal point of view. For example, a TV series co-produced by a majority country and a minority country in the framework of an official co-production agreement may be regarded as being national by both countries. In this report, however, it will only be attributed to the majority country.

What is a co-production?

A co-production is a programme financed by at least two different countries.

Geographical zones used for the analysis

The following zones are used in this report:

- “EU28”: European Union.
- “Other Europe”: countries that are members of the European Audiovisual Observatory but not members of the European Union: Albania, Armenia, Bosnia-Herzegovina, the “Former Yugoslav Republic of Macedonia”, Georgia, Iceland,



Liechtenstein, Montenegro, Norway, the Russian Federation, Switzerland and Turkey.

- “US”: United States of America.
- “Others”: all other countries.

1.3 Sample

The data provided by Plurimedia/The European Metadata Group:

- includes 124 TV channels from 22 European Union Countries - 68 private broadcasters and 46 broadcasters. The channels were selected on the basis of the following criteria:
 - leading private and public broadcasters in each country;
 - leading pay-TV channel in each country.
- comprises all broadcasts of TV series, including night-time and repeats of the same programme.
- includes all TV fiction broadcast in 2017.

Table 9. Sample for the analysis of TV fiction broadcast

Country	Number of channels	Country	Number of channels
AT	2	GR	5
BE ²¹	13	HR	5
BG	3	HU	4
CZ	4	IE	2
DE	8	IT	6
DK	3	NL	9
ES	9	PL	5
FI	4	RO	6
FR	9	SE	3
FR/DE ²²	1	SI	4
GB	6	SK	3

²¹ The high number of channels considered is linked to the two main linguistic communities.

²² Arte.



1.4 Limits

- The sample may not be representative of the television channels in Europe. In particular, thematic channels are underrepresented.
- The identification of the country(ies) of origin of a programme may prove difficult in some cases. Therefore, identifying co-productions may also be challenging.
- The number of repeats by programme may strongly differ between television channels. Repeats may include both a rerun of the same programme after several weeks or months, and the rerun during night-time of the programmes broadcast during the day. The results in this report may therefore have been substantially different if night-time reruns²³ had been excluded.

This section builds on the analysis of the 2017 programming of a sample of **124 TV channels** from **22 European Union countries**.

TV fiction is defined in this section as any category of scripted television programme, excluding animation TV programmes.

The data was provided to the Observatory by The European Metadata Group. The data includes all TV fiction broadcasts by the broadcasters of the sample. It is important to note that:

- a. the TV broadcasters' full schedule has been covered, including night-time;
- b. all categories of repeats of the same TV fiction programmes are included.

The figures provided in this report do not necessarily reflect the way quotas of European works are actually measured in the different countries.

²³ The split between day-time and prime-time is not available. Moreover, seeking to define night-time would run up against the challenge of diversenational situations.



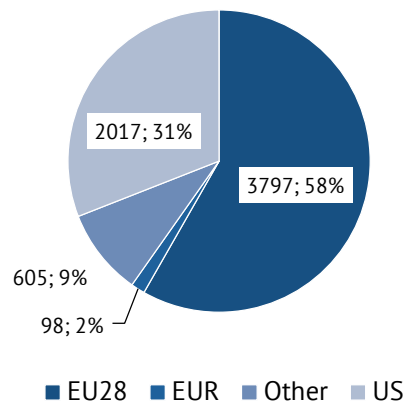
2 Unique TV fiction titles broadcast on TV

This section deals with **unique titles**, i.e. different titles broadcast by at least one television channel. The figures do not take into account the broadcast of the same title by different television channels.

2.1 What is the origin of TV fiction broadcast on TV?

A total of **6 517** different TV series and TV films were broadcast by at least one television channel of the sample during 2017²⁴. A total of **58%** of these titles originated from the EU28²⁵.

Figure 21. Number and share of unique TV fiction titles broadcast - 2017



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

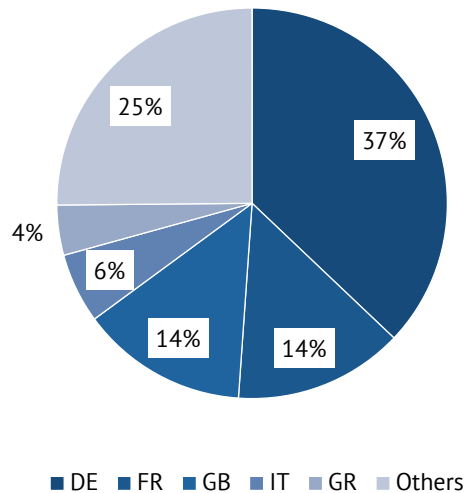
²⁴ The 6 517 TV series and TV films titles represent 10 352 titles when taking into account the different seasons of the TV series.

²⁵ This share of EU28 titles does not take into account the number of episodes broadcast nor the number of channels where the episodes were broadcast. The actual proportion of EU28 titles among the channels' broadcasts is addressed in the next section.



Among the EU28 titles, the main country of production was by far Germany. Of note is the no. 5 spot for Greece; this does not imply a higher level of production, but that a large number of Greek titles, whatever their production year, are still being broadcast.

Figure 22. Share of EU 28 unique TV fiction titles broadcast by country of origin - 2017



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

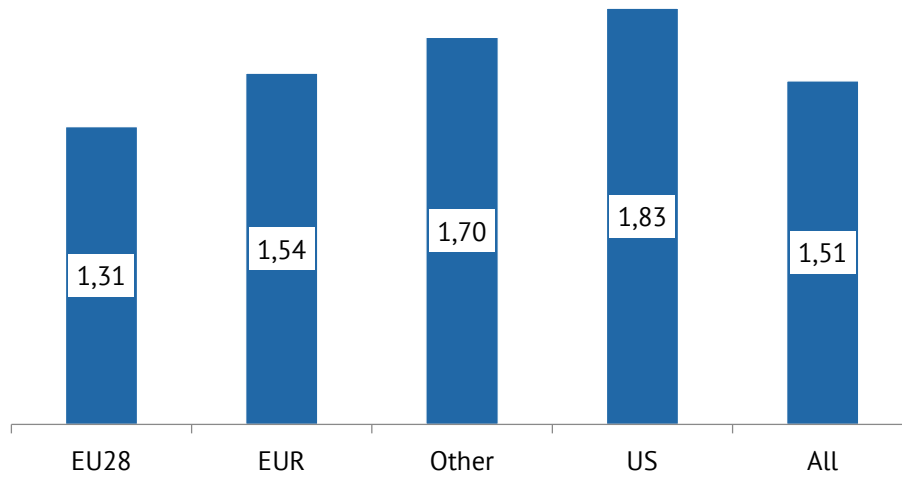
2.2 In how many countries is a TV fiction programme available?

TV fiction titles tend to be broadcast in the same year in a relatively low number of countries. On average, a given title was found in 1.5 countries²⁶. The number of countries of presence is somewhat higher for US TV fiction titles.

²⁶ Whatever the season broadcast in the different countries.



Figure 23. Number of country of presence of unique titles by origin - 2017



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

A total of 15 out of 21 titles found in at least **10 different countries** were of US origin.

Table 10. Unique titles present in at least 10 countries - 2017

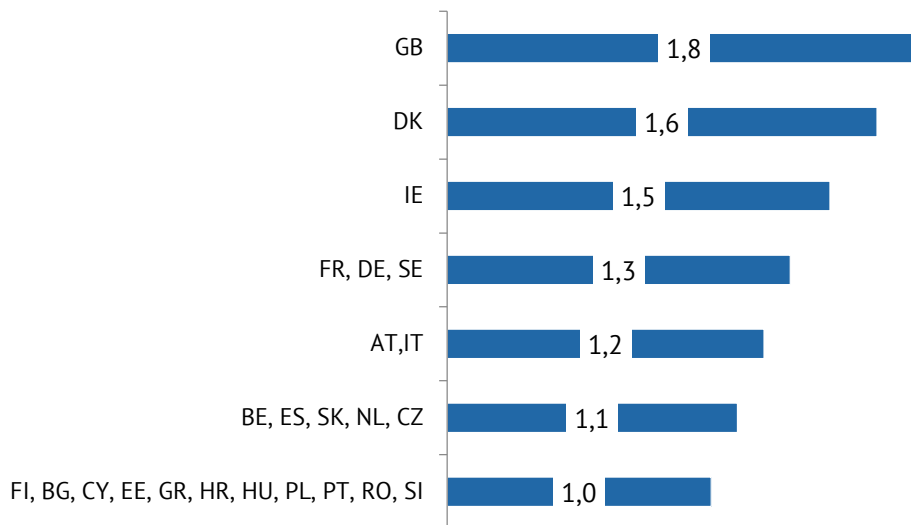
Title	Origin	Countries of presence
Hawaii Five-0	US	14
Homeland	US	13
Castle	US	12
Law & Order : Special Victims Unit	US	12
Sherlock	GB	12
Blue Bloods	US	11
Bones	US	11
Lethal Weapon	US	11
The Big Bang Theory	US	11
The Mentalist	US	11
The Night Manager	GB-US	11
Victoria	GB	11
CSI : Crime Scene Investigation	CA-US	10
Elementary	US	10
Father Brown	GB	10
Midsomer Murders	GB	10
Mom	US	10
NCIS : New Orleans	US	10
The Blacklist	US	10
The Mysteries of Laura	US	10
Two and a Half Men	US	10

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

Among EU28 titles, UK productions were available in the **largest number of countries**. Of note is the relatively high level of circulation of TV fiction titles from Denmark and Sweden.



Figure 24. Number of countries of presence of EU 28 unique titles by origin - 2017



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

Among EU28 titles, 18 out of 21 TV fiction programmes present in at least seven countries were produced or co-produced by the **United Kingdom**.

Table 11. Unique EU28 titles present in at least 7 countries - 2017

Title	Origin	Countries of presence
Sherlock	GB	12
The Night Manager	GB-US	11
Victoria	GB	11
Father Brown	GB	10
Midsomer Murders	GB	10
DCI Banks	GB	9
Poirot	GB	9
Vera	GB	9
Wallander	GB	9
The Missing	GB	8
Death in Paradise	FR-GB	7
Der Bergdoktor	DE-AT	7
Downton Abbey	GB	7
Endeavour	GB	7
Happy Valley	GB	7
Kommissar Rex	DE	7
Line of Duty	GB	7
Mr. Bean	GB	7
Poldark	GB	7
Unforgotten	GB	7
Vikings	IE-CA	7

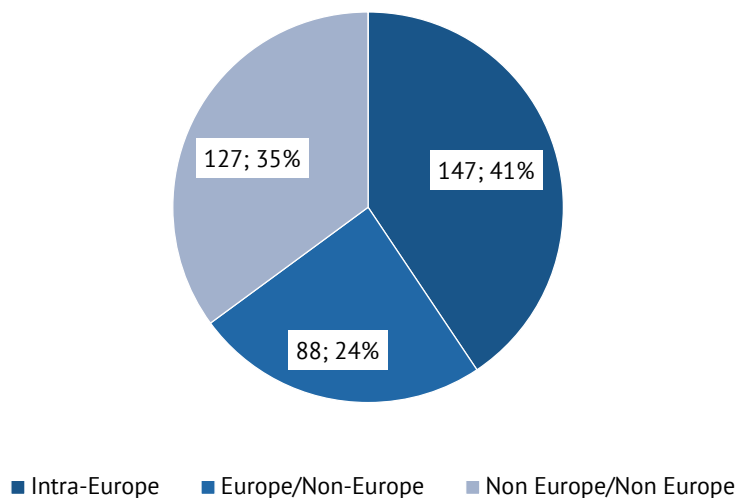
Source: European Audiovisual Observatory analysis of The European Metadata Group data



2.3 What is the share of co-productions out of TV fiction broadcast?

Among the 6 517 different TV fiction titles identified, only **362 were co-productions, i.e. 5.6%**. A total of 41% of these were intra-European co-productions.

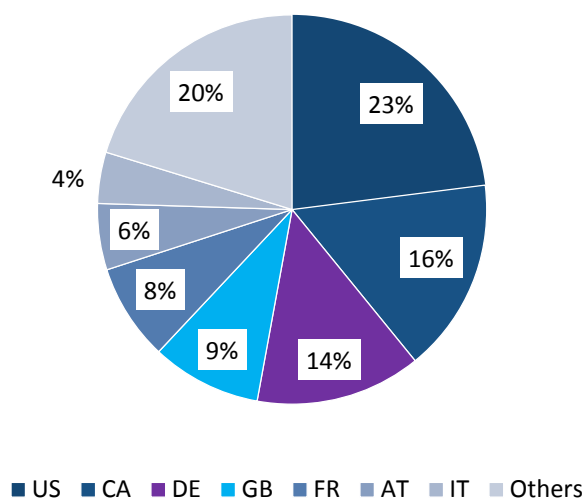
Figure 25. Breakdown of TV fiction co-productions - 2017



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

Cumulatively, the 362 co-productions involved 800 countries, i.e. an average of 2.2 countries per co-production. **The US, Canada and Germany** were the countries most involved in co-productions. Whatever the origin of TV fiction, the most frequent co-productions associated the US and Canada, Germany and Austria, and the US and the United Kingdom.

Figure 26. Countries involved in co-productions - 2017



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

The analysis of the number of countries of presence shows that, on average, TV fiction co-productions circulate, to a certain extent, more than 100% national ones. However, co-productions impact the circulation less than, notably, the country of origin or the language of a TV fiction.

Table 12. Circulation of co-productions - 2017

	Countries of presence
All titles	1,51
All co-productions	1,64
All European TV fiction	1,31
All European co-productions	1,57

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



3 Broadcasts of TV fiction on television

This section deals with the **cumulated broadcasting of TV fiction**. All broadcasts of a given title by the same television channel or by different TV channels are taken into account.

3.1 What is the volume of TV fiction broadcast on TV?

A total of **10 230 TV fiction titles** were broadcast in 2017, representing close to 270 000 episodes and nearly 195 000 hours. When compared to TV series, TV films obviously represent a large share of titles (56%) but a minor share of hours (8%).

Table 13. Volume of TV fiction broadcasts on TV - 2017

	Titles	Episodes	Hours
TV film	5 733	10 335	15 956
TV series	4 497	183 844	126 687
n.a. ²⁷	1 373	75 658	52 000
Total	10 230	269 837	194 642

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

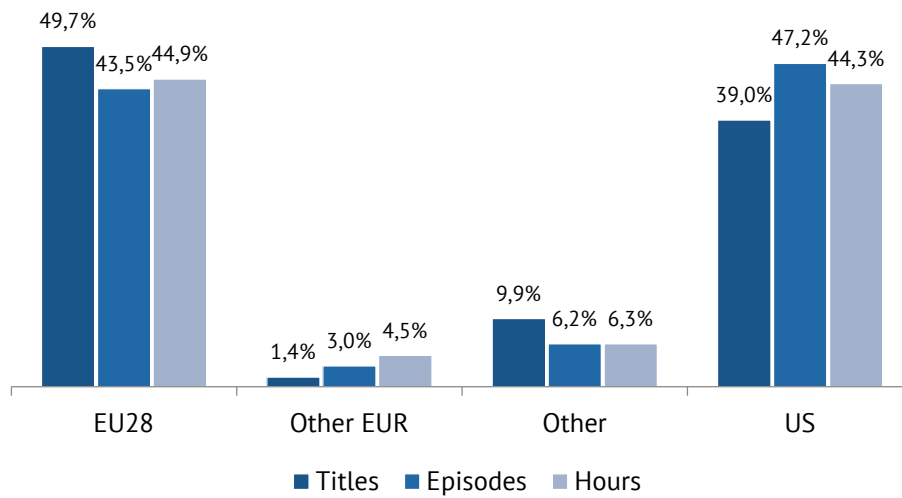
3.2 What is the share of EU28 TV fiction?

EU28 TV fiction programmes account for 50% (in number of titles), 44% (in number of episodes) and 45% (in hours) of the total volume of TV fiction broadcasts.

²⁷ Corresponds to titles where it was not possible to identify whether the title was part of a TV series.



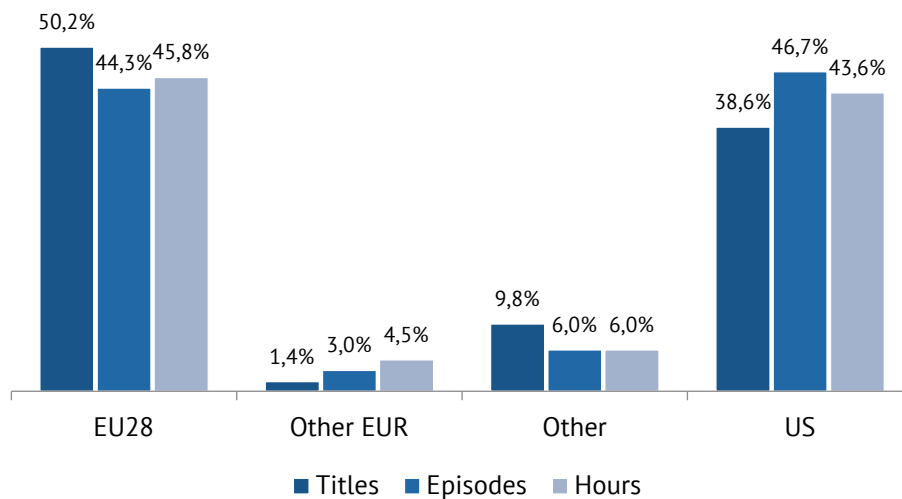
Figure 27. Origin of TV fiction broadcasts in EU28 (EU28 = main country of production) - 2017



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

The previous graph allocates the country of origin of TV fiction based on the main co-producer. The figures are remarkably similar when considering as EU28 fiction any fiction with a EU28 co-producer, due to the very limited number of co-productions.

Figure 28. Origin of TV fiction broadcasts EU28 (EU28 = any country of production) - 2017



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



The share of European²⁸ TV fiction varies in the sample **from less than 25% to more than 90%**.

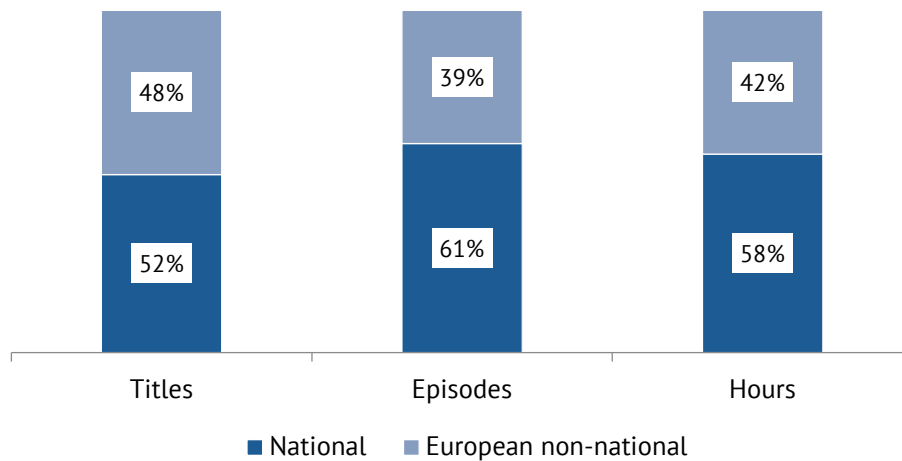
Table 14. Number of TV channels by cluster of share of European TV fiction - 2017

Share of European TV fiction	Number of channels
>90%	22
75%-90%	13
50%-75%	29
25%-50%	24
0-25%	26

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

National TV fiction represents between 52% (in titles) and 61% (in number of episodes) of the total volume of European²⁹ TV fiction broadcasts.

Figure 29. Breakdown of European TV fiction between national and European non-national - 2017



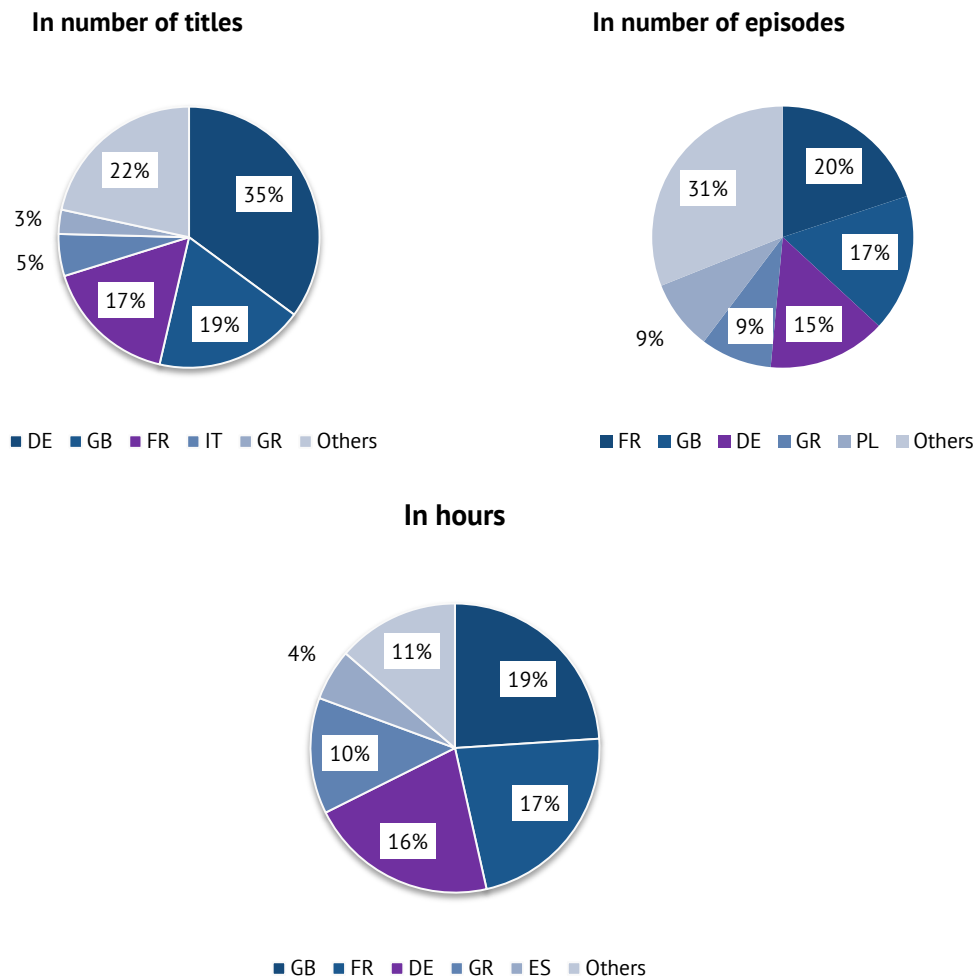
Among EU28 TV fiction broadcasts, **TV fiction originating from Germany** leads in terms of number of **titles** (due to the high number of TV films produced in the country), whereas **UK and French** TV fiction leads in terms of number of **episodes** and **hours**.

²⁸ EU28 + other European countries that are members of the European Audiovisual Observatory.

²⁹ EU28 + other European countries that are members of the European Audiovisual Observatory.



Figure 30. Origin of EU28 TV fiction by main country of production - 2017

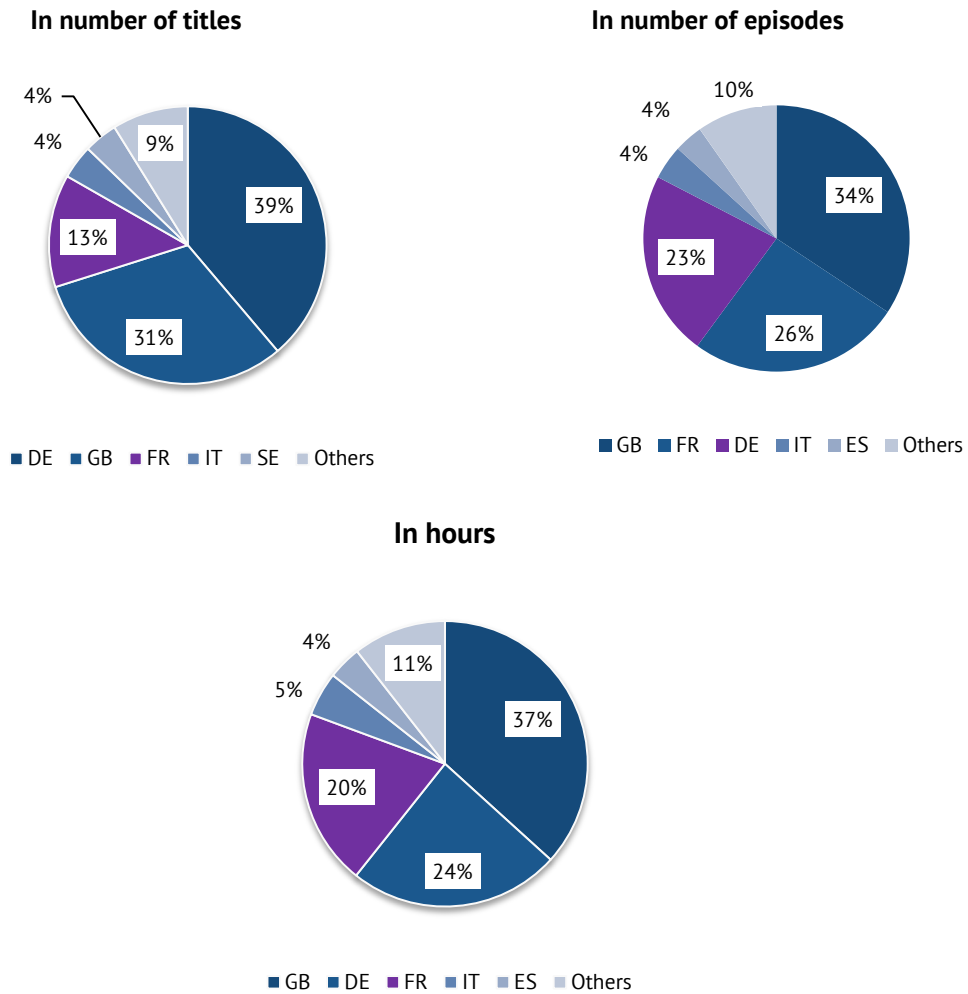


3.3 Who are the main exporters of TV fiction on TV?

Focusing on European non-national fiction, i.e. neutralising the effect of the broadcasting of TV fiction from a given country in the same country, allows analysis of the **main exporters** of TV fiction. Here again, Germany appears to be the leading exporter in terms of titles, whereas **UK and French** TV fiction leads in terms of number of **episodes** and **hours**.



Figure 31. Origin of EU28 non-national TV fiction by main country of production - 2017



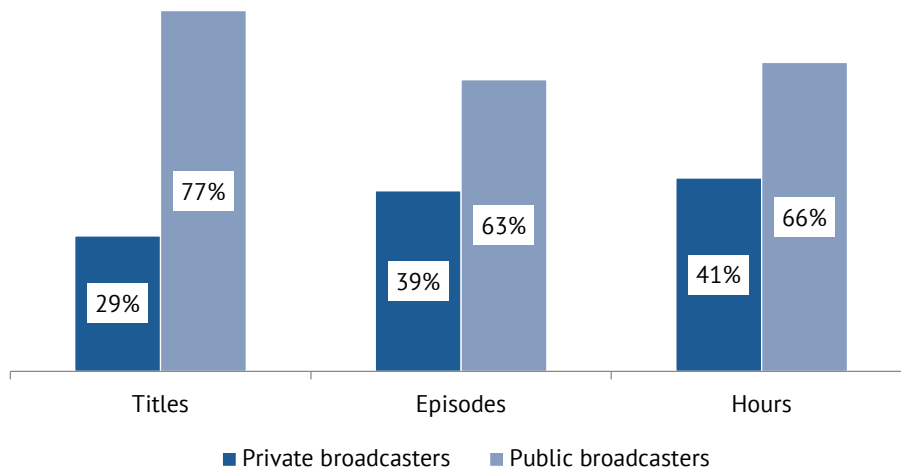
3.4 Do public and private broadcasters broadcast the same share of European TV fiction?

Public broadcasters tend to broadcast more European³⁰ TV fiction than private broadcasters. The difference is particularly significant in terms of number of titles.

³⁰ EU28 + other European countries that are members of the European Audiovisual Observatory.



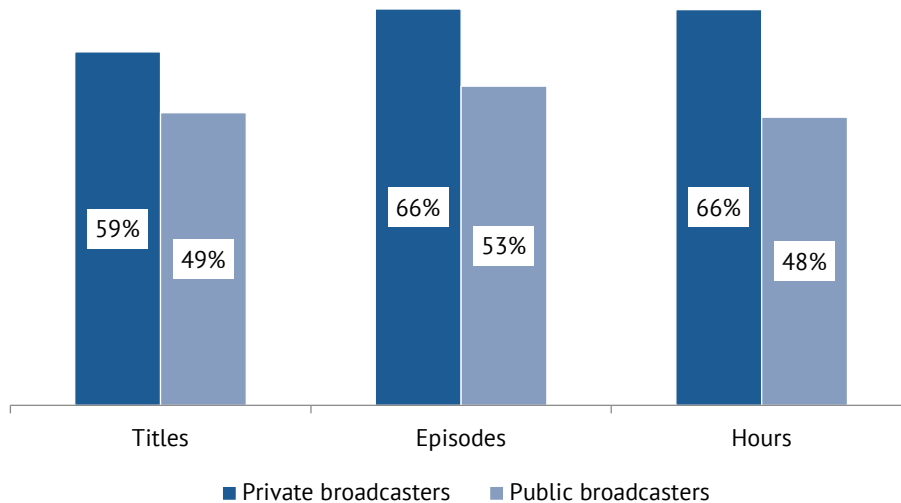
Figure 32. Share of European TV fiction broadcast, by statute of broadcaster - 2017



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

Out of EU28 TV fiction, private broadcasters tend to rely more than public broadcasters on national fiction rather than on European non-national fiction.

Figure 33. Share of national TV fiction out of EU28 TV fiction, by statute of broadcasters - 2017



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



THE CIRCULATION OF TV FICTION ON VOD



1 Methodology

This section is the first edition of the analysis of the circulation of TV fiction on VOD in Europe.

1.1 Source of the data

The underlying data used in this section was extracted by the Observatory from a selection of video-on-demand (VOD) services in December 2017.

1.2 Definitions

What is TV fiction?

TV fiction is any kind of scripted programme made for television. Please note that TV films are included but not films, i.e. a programme released in cinemas in at least one European country.

What are TVOD and SVOD?

SVOD services offer access to a catalogue of programmes for a flat fee. TVOD allows the purchase or renting of a programme - on a programme per programme basis.

Service vs. catalogue

A service can be active in several countries. The national version is hereafter called a catalogue.

What are 'national', 'multi-country' and pan-European VOD services?

National services are mainly active in one country. Multi-country services are services with the data of several catalogues available in the sample. Pan-European VOD services are services with the catalogue data of almost all European Union countries available in the sample.

What is the country of origin of a programme?

The country of origin of a programme is the country from which the funding of a programme originates.

What is the country of origin of a co-production?

A co-production is a programme financed by at least two different countries.



In case of co-production, the country of origin is the country providing the highest share of the funding. Please note that the country of origin of a programme from a funding point of view differs from the nationality of the programme from a legal point of view. For example, a TV series co-produced by a majority country and a minority country in the framework of an official co-production agreement may be regarded as being national by both countries. In this report, however, it will only be attributed to the majority country.

In some cases, a broader, explicitly mentioned definition is used: the work is attributed to all co-producing countries.

What is the format of a TV fiction programme?

The format of a TV fiction programme relates to the number of episodes produced in a given season.

1.3 Main indicators

Unique titles and cumulated presence

Throughout the report, the main figures are provided for:

- Unique titles: each title is counted once even if available in several services/countries
- Cumulated presence: each occurrence in a catalogue is accounted for.

Circulation

Circulation refers to the number of countries in which a given TV fiction programme is present.

Export ratio

The export ratio refers to the number of countries in which a TV fiction programme is present, excluding the main production country

The “extended” export ratio refers to the number of countries in which a TV fiction programme is present, excluding all the production countries.

1.4 Sample

The sample includes:

- 47 SVOD catalogue services from 27 European Union countries³¹.
- 45 TVOD catalogue services from 13 European Union countries³².

³¹ No SVOD service from Luxembourg.



Table 15. Sample for the analysis of TV fiction circulation on VOD

	SVOD			TVOD		
	National	Multi-country/ Pan-European	Total	National	Multi-country/ Pan-European	Total
AT		1	1	1	2	3
BE	1	1	2			0
BG		1	1			0
CY		1	1			0
CZ		3	3			0
DE		3	3	3	4	7
DK		2	2	1	2	3
EE		1	1			0
ES	1	1	2		2	2
FI		2	2		2	2
FR	3	1	4	3	5	8
GB	1	2	3	2	4	6
GR		1	1			0
HR		1	1			0
HU		1	1			0
IE	1	1	2		1	1
IT	2	1	3		3	3
LT		1	1			0
LV		1	1	1		1
MT		1	1			0
NL		1	1	1	1	2
PL	1	2	3		1	1
PT		1	1			0
RO		1	1			0
SE		2	2	2	2	4
SI		2	2			0
SK		1	1			0
Total	10	37	47	14	29	43

A total of 4 140 and 3 136 different TV fiction titles were found on SVOD and TVOD services, respectively.

1.5 Limits

- The sample may not be representative of the VOD services in Europe. In particular, independent VOD services are underrepresented.

³² Austria, Germany, Denmark, Spain, Finland, France, United Kingdom, Ireland, Italy, Latvia, Netherlands, Poland, Sweden.



- The identification of the country(ies) of origin of a programme may be difficult in some cases. Therefore, identifying co-productions may also prove challenging.





2 Availability of European TV fiction on VOD

2.1 What is the volume of TV fiction available on VOD?

A total of 4 140 and 3 136 unique TV fiction titles were found in the **SVOD** and **TVOD** samples, respectively.

On a cumulative basis, these different titles represented **25 565** occurrences on SVOD and **8 045** occurrences on TVOD. The much higher ratio between occurrences and unique titles for SVOD is mainly due to the weight of Netflix in the SVOD sample and its acquisitions of TV works for several countries.

2.2 What is the volume and share of European fiction on VOD?

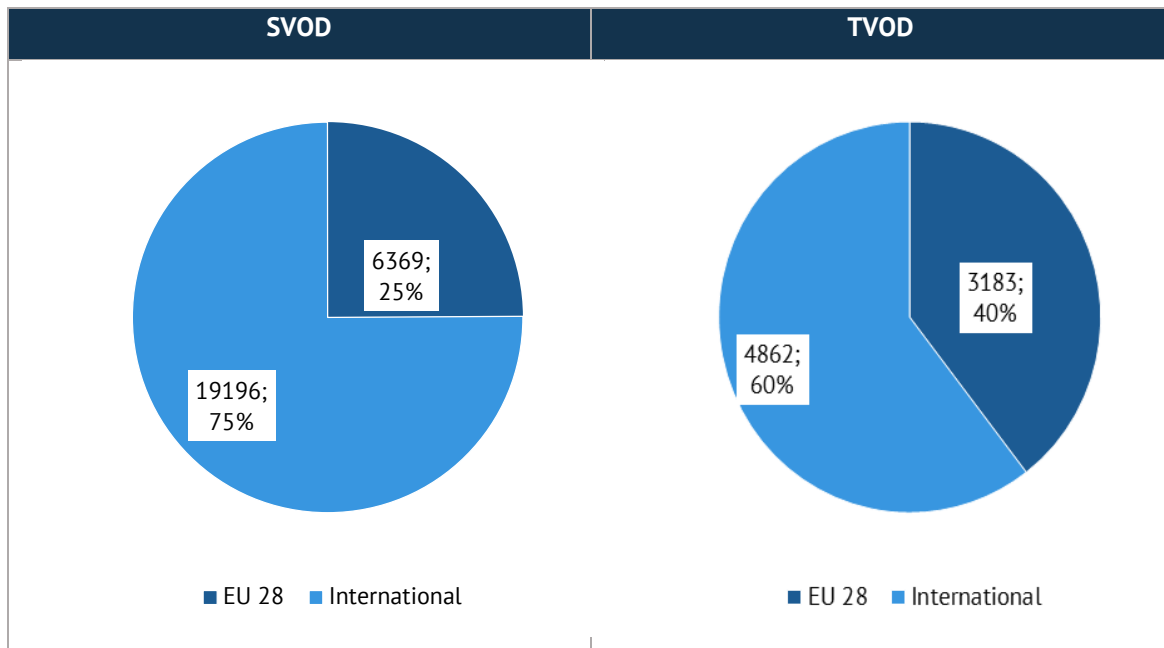
In **absolute terms**, the United Kingdom, with 2 841 titles, is, by far, the country with the most EU28 available titles on **SVOD**, almost twice the volume of no. 2 Germany, with 1 605 titles.

France (2 254 titles), the United Kingdom (2 101 titles) and Germany (2 085 titles) have, by a wide margin, the biggest cumulated catalogues on **TVOD**.

In proportion, EU28 titles account for 25% of the cumulated number of TV fiction titles available on **SVOD**, but for 40% in **TVOD**.



Figure 34. Share of EU28 cumulated titles on SVOD and TVOD

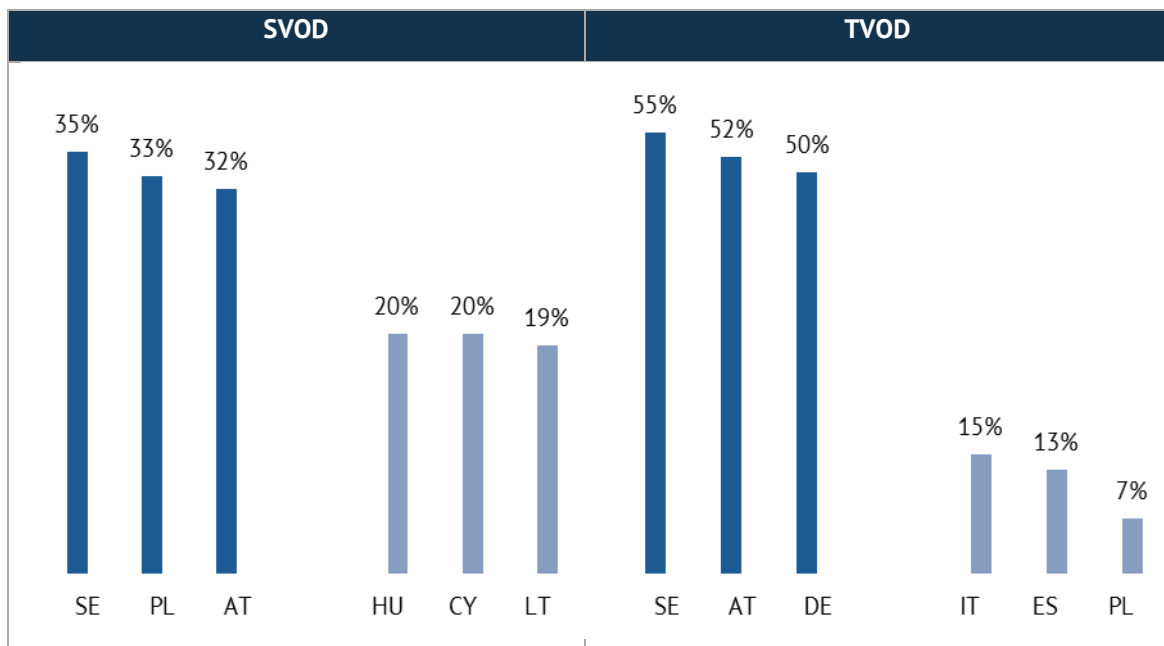


Source: European Audiovisual Observatory

On **SVOD**, the share of EU titles varies between 20% or less (HU, CY, LT) and 30% or more (FI, FR, AT, PL, SE).

On **TVOD**, the share varies between 15% or less (IT, ES, PL) and 50% or more (SE, AT, DE).

Figure 35. Share of EU titles on SVOD and TVOD: Top 3 and bottom 3 countries



Source: European Audiovisual Observatory

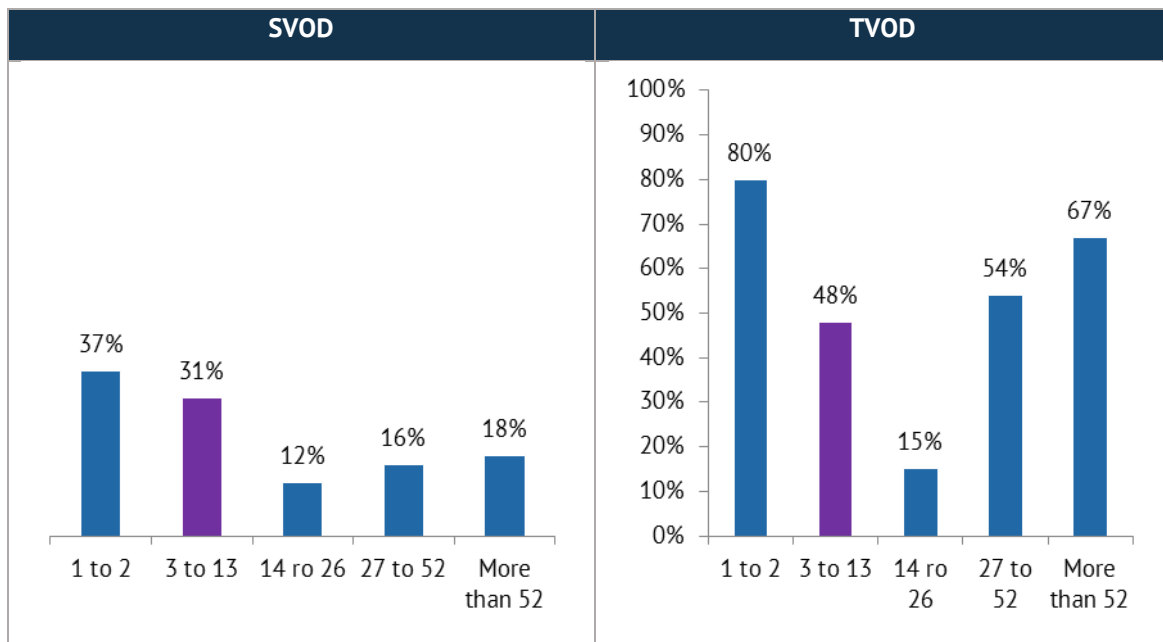


2.3 Which are the most available formats?

On **SVOD**, the share of EU28 works is higher for high-end drama, i.e. TV films (1 or 2 episodes) and 3-13 episode TV series.

On **TVOD**, the share of EU28 TV fiction titles is the highest for TV films (1 to 2 episodes).

Figure 36. Share of EU28 vs. international cumulated titles on SVOD and TVOD by episode format

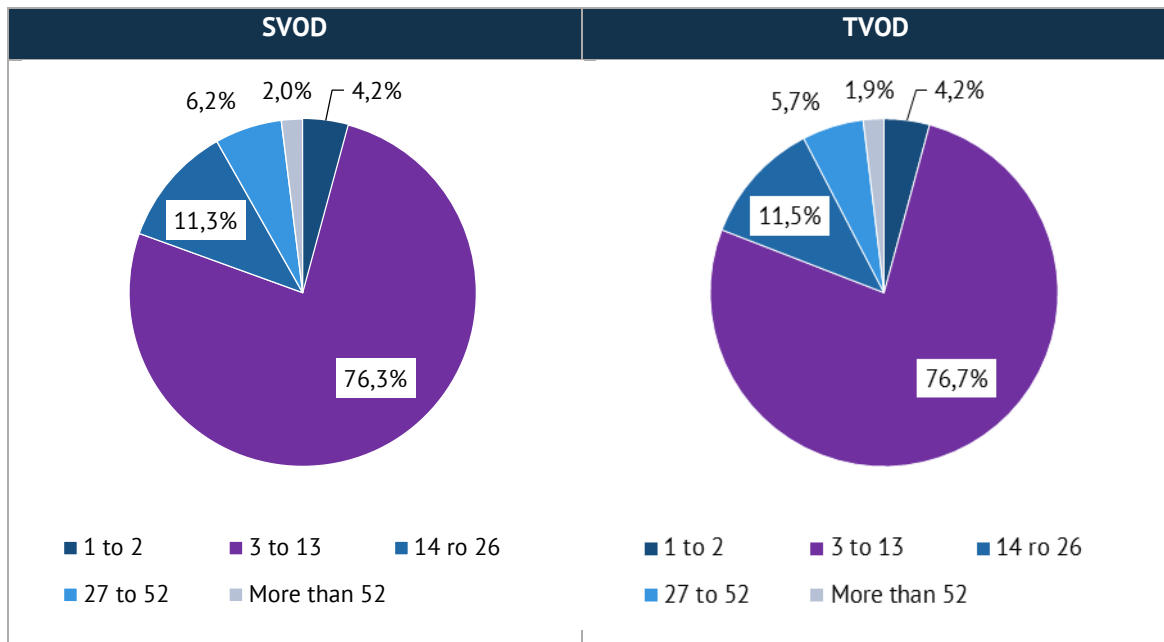


Source: European Audiovisual Observatory

The distribution of European TV fiction by format is remarkably similar for **SVOD** and **TVOD**. A total of 77% of European titles on both SVOD and TVOD are 3-13 episode TV series.



Figure 37. Share of EU28 cumulated titles on SVOD by episode format



Source: European Audiovisual Observatory

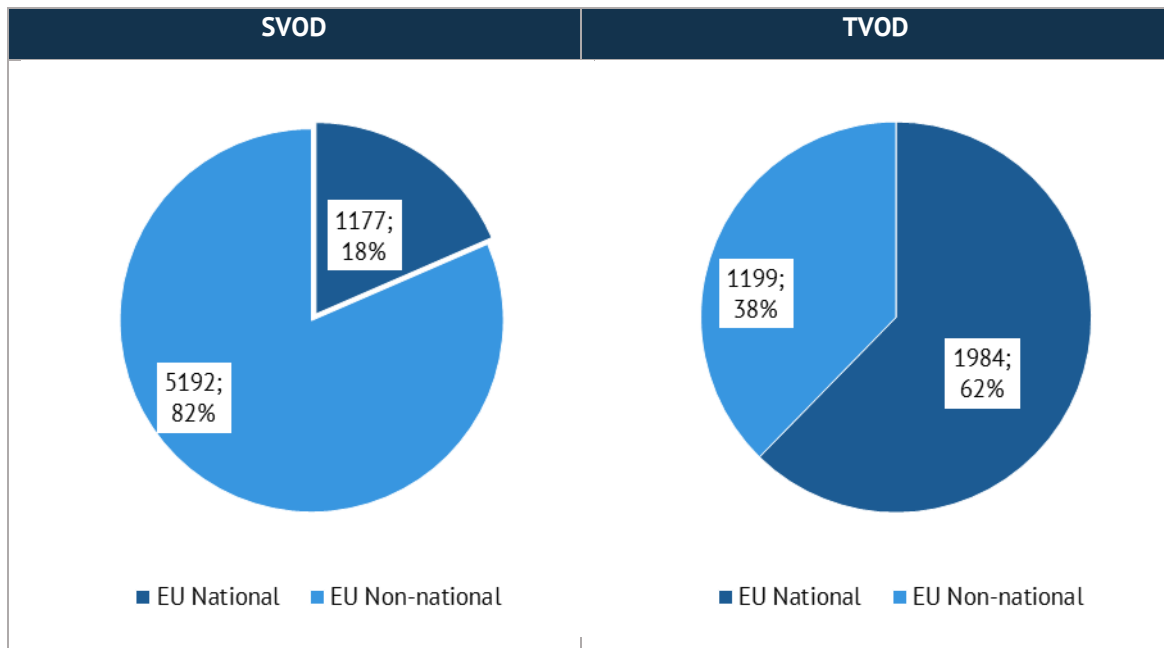
2.4 What is the weight of European non-national TV fiction?

Among European works, the respective share of national and non-national titles strongly differs between **SVOD** and **TVOD**: European non-national titles account for 82% of all European titles on **SVOD**, but for only 38% on **TVOD**. The gap can be attributed to the strong weight of Netflix in the **SVOD** sample, and its policy of purchasing pan-European rights.

The high-producing countries (e.g. United Kingdom, Germany and France) obviously have, on average, a higher share of national titles, especially the UK (76% on **SVOD**, 88% on **TVOD**). But other countries such as Sweden (**SVOD** and **TVOD**), Poland, Austria and Denmark (**TVOD**) also have a higher-than-average share of national titles.



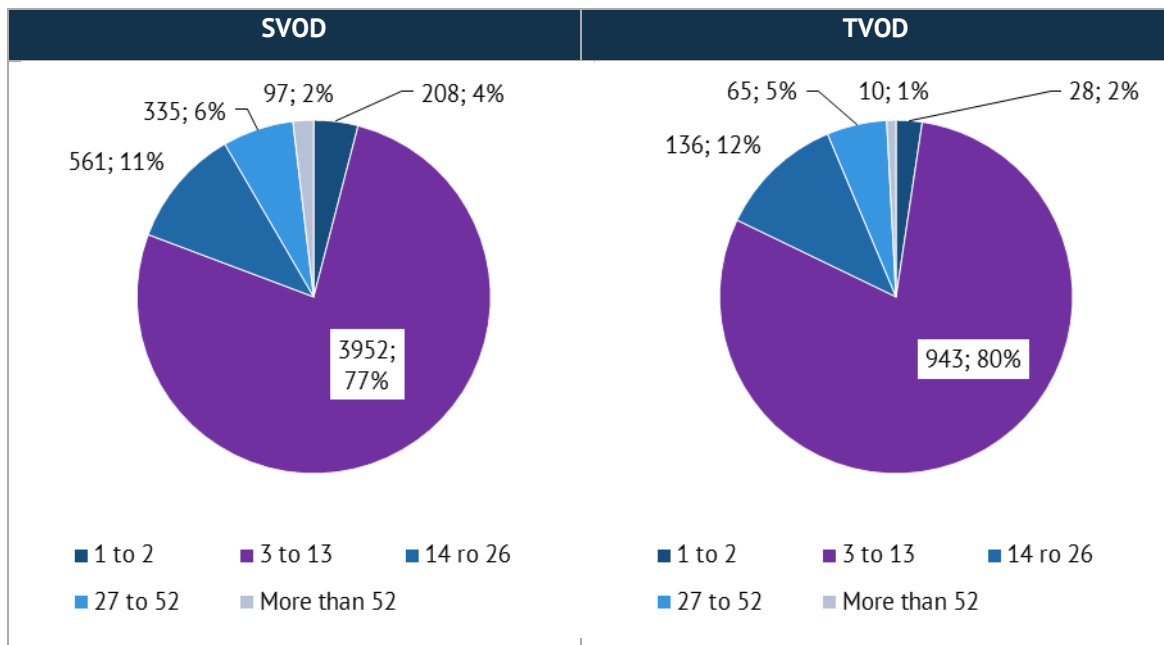
Figure 38. Share of EU28 non-national and national cumulated titles on SVOD and TVOD



Source: European Audiovisual Observatory

The large majority of European non-national titles are 3-13 episode TV series (77% for **SVOD**, 80% for **TVOD**) - confirmation that high-end drama is the format that travels best.

Figure 39. Breakdown of European non-national titles by format on VOD



Source: European Audiovisual Observatory





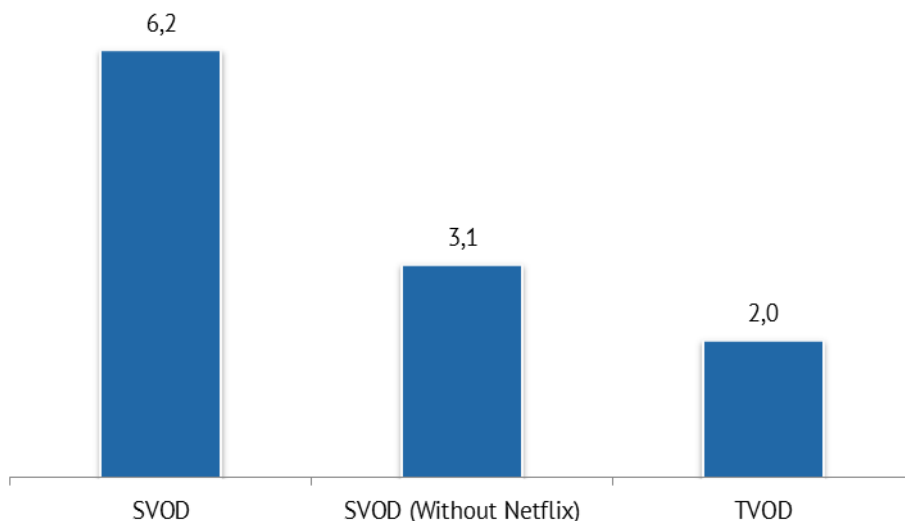
3 The circulation of European TV fiction on VOD

3.1 In how many countries is a TV fiction programme available?

On average, a TV fiction programme is available on **TVOD** in two territories and in 6.2 territories on **SVOD**. However, these figures are not directly comparable:

- The sample for **SVOD** services includes a much higher number of countries (27) than the **TVOD** sample (13).
- The weight of Netflix in the SVOD sample distorts the results (31 titles are available in 27 countries through Netflix. Ten more titles are available in 26 countries and another 10 titles are available in 25 territories). Without Netflix, the average number of countries of availability is only 3.1.

Figure 40. Average number of countries of availability on SVOD and TVOD³³



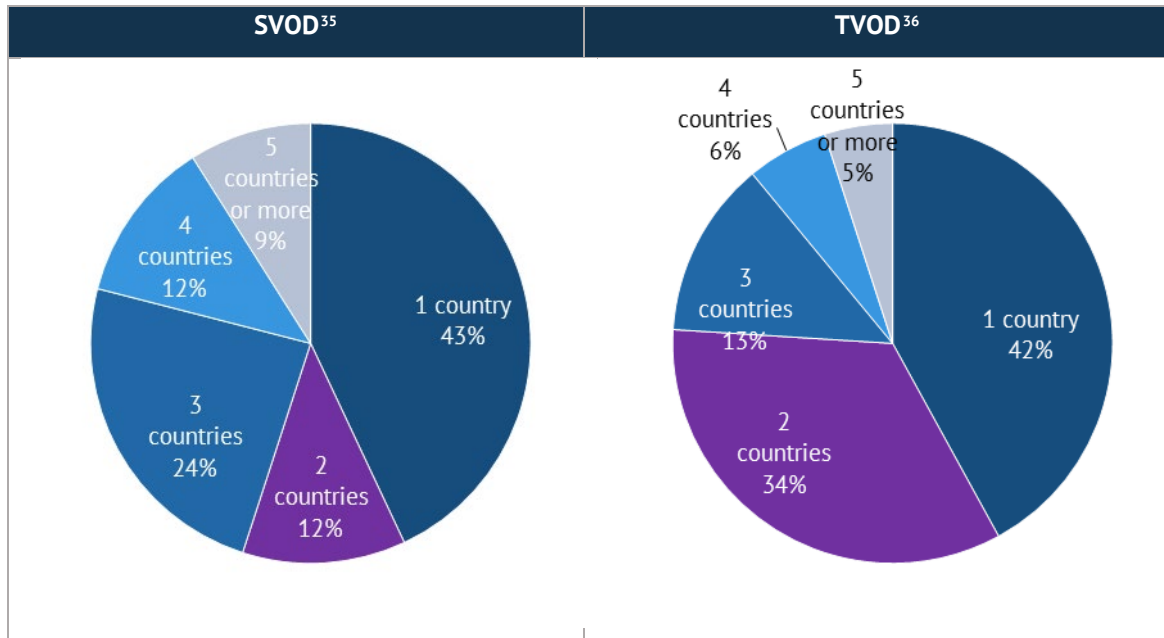
Source: European Audiovisual Observatory

³³ Excluding the country of origin of the work.



Almost half of EU non-national titles are available in only one country.

Figure 41. EU 28 non-national titles by number of countries of availability³⁴



Source: European Audiovisual Observatory

On SVOD, excluding Netflix, 10 EU28 non-national unique titles are available in six, five or four distribution countries beyond their national markets. A total of 40% of top 10 titles are co-productions. A full 60% have the United Kingdom as producer or main co-producer, while 80% have participation from the UK.

³⁴ Excluding the country of origin of the work.

³⁵ The sample includes 27 countries.

³⁶ The sample includes 13 countries.

**Table 16. Top 10 EU28 non-national titles on SVOD by number of countries of availability (without Netflix)**

Title	Year	Production countries	Number of countries ³⁷	Distribution countries	Format
Vikings	2013	IE,CA	6	DK,ES,FI,GB,IT,SE	14-26 ³⁸
Peaky Blinders	2013	GB	5	DK,FI,FR,PL,SE	3-13
Riviera	2017	GB	5	DK,ES,FI,FR,SE	3-13
Tin Star	2017	GB	5	DK,ES,FI,PL,SE	3-13
Deutschland 83	2015	DE	4	ES,FI,FR,SE	3-13
Downton Abbey	2010	GB	4	CZ,DE,ES,FR	3-13
Safe House	2015	GB	4	DK,FI,PL,SE	3-13
The White Queen	2013	GB,FR	4	FI,FR,PL,SE	3-13
The Young Pope	2016	IT,FR,ES,GB,US	4	FI,FR,GB,SE	3-13
Versailles	2015	FR,CA,GB	4	ES,FI,GB,SE	3-13

Source: European Audiovisual Observatory

On **TVOD**, 75% of top 12 EU28 non-national titles are co-productions. Half (50%) of the titles are of UK origin (i.e. have the United Kingdom as producer or main co-producer) and two-thirds (67%) have the UK as producer or co-producer.

Table 17. Top 12 EU28 non-national titles on TVOD by number of countries of availability

Title	Year	Production countries	Number of countries ³⁹	Availability countries	Format
The Young Pope	2016	IT,FR,ES,GB,US	8	DE,NL,FI,SE,FR,DK,LV,GB	3-13
Prison Break	2005	GB,US	7	IT,DE,FI,SE,AT,FR,DK	14-26
Vikings	2013	IE,CA	7	DE,FI,SE,FR,DK,LV,GB	14-26
Heidi	2014	FR,AU	6	IT,DE,NL,AT,LV,GB	27-52
The Fall	2013	GB	6	NL,FI,SE,FR,DK,LV	3-13
The Tudors	2007	IE,CA,US,GB	6	DE,ES,NL,FR,DK,GB	3-13
Broadchurch	2013	GB	5	DE,FI,SE,FR,DK	3-13
Bron/Broen	2013	SE,DK,DE	5	NL,IE,FR,DK,GB	3-13
Crossing Lines	2013	FR,DE,US,BE	5	DE,FI,SE,LV,GB	3-13
Luther	2010	GB	5	IT,DE,AT,FR,LV	3-13

³⁷ Excluding the country of origin of the work.

³⁸ Vikings seasons 1-3 count 9 or 10 episodes, while seasons 4-6 count 20 episodes each.

³⁹ Excluding the country of origin of the work.



Title	Year	Production countries	Number of countries ³⁹	Availability countries	Format
Rome	2005	GB,US	5	IT,DE,FI,AT,FR	3-13
The Promise	2011	GB,US	5	IT,DE,SE,AT,FR	3-13

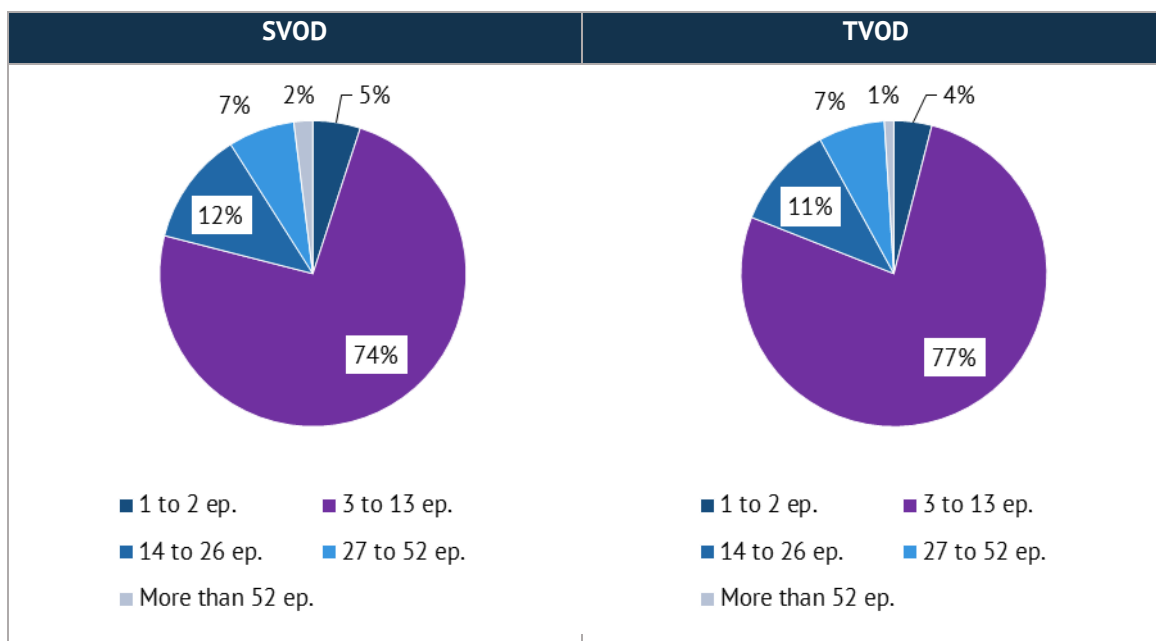
Source: European Audiovisual Observatory

3.2 Which formats are the most exported?

TV series with 3-13 episodes are by far the most exported format:

- On the one hand, 3-13 episode TV series represent the bulk (74% on **SVOD**, 77% on **TVOD**) of unique non-national titles, i.e. titles that have been exported at least once.
- On the other hand, on SVOD, 3-13 episode TV series are available in the highest number of territories due, in particular, to the weight of Netflix in the SVOD sample. They circulate much less on **TVOD, however**.

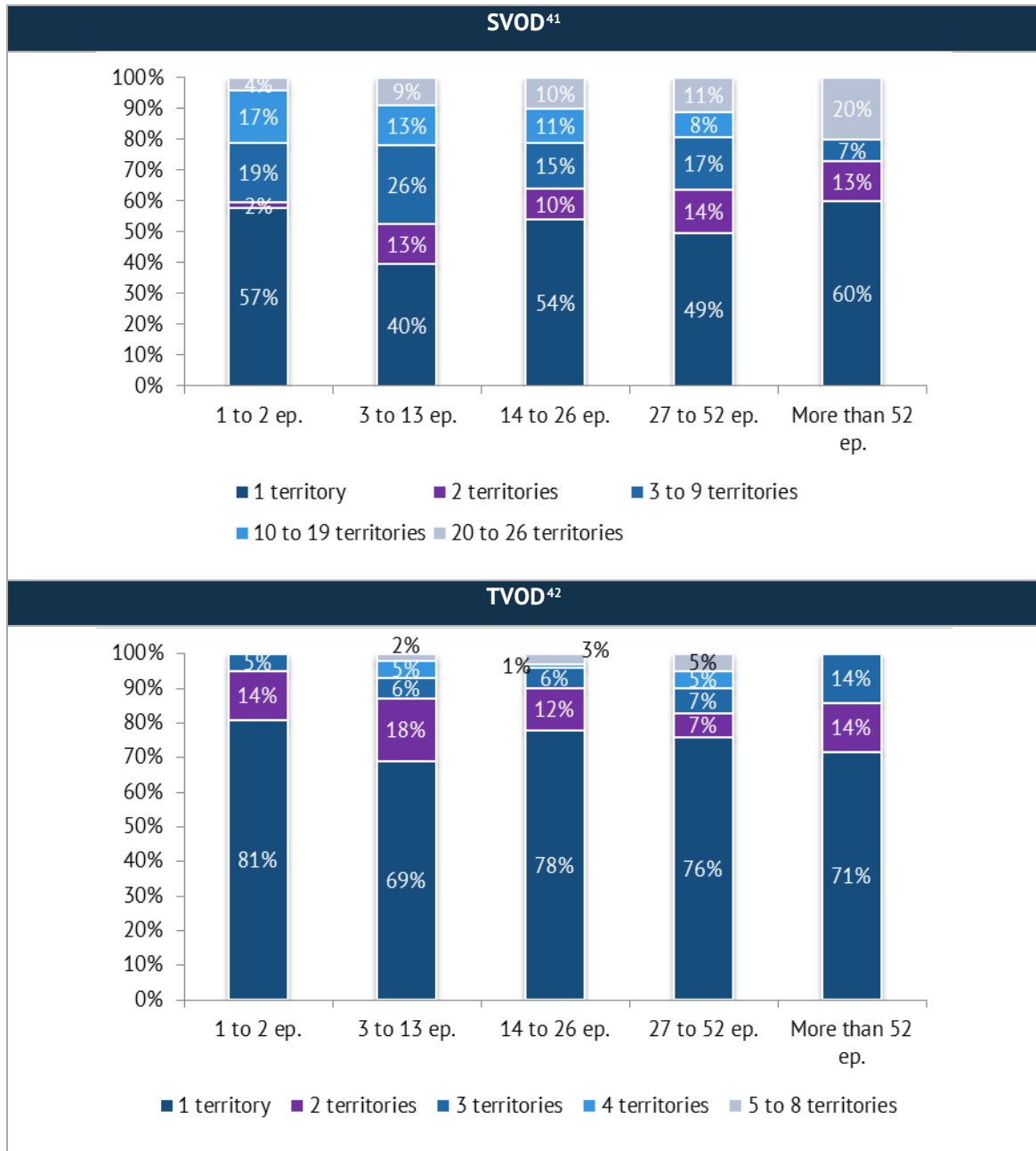
Figure 42. Share of EU28 non-national unique titles on SVOD and TVOD by format



Source: European Audiovisual Observatory



Figure 43. Number of territories of availability by format⁴⁰



Source: European Audiovisual Observatory

⁴⁰ Excluding the country of origin of the work.

⁴¹ The sample includes 27 countries.

⁴² The sample includes 13 countries.



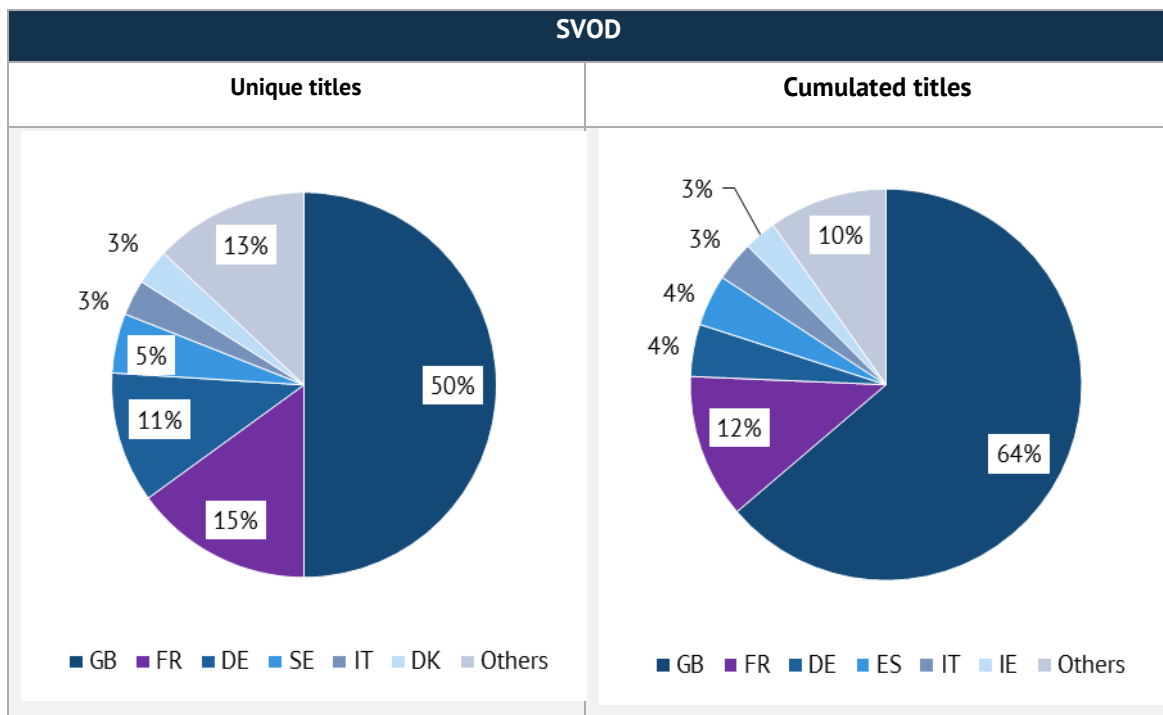
3.3 Which countries export most on VOD?

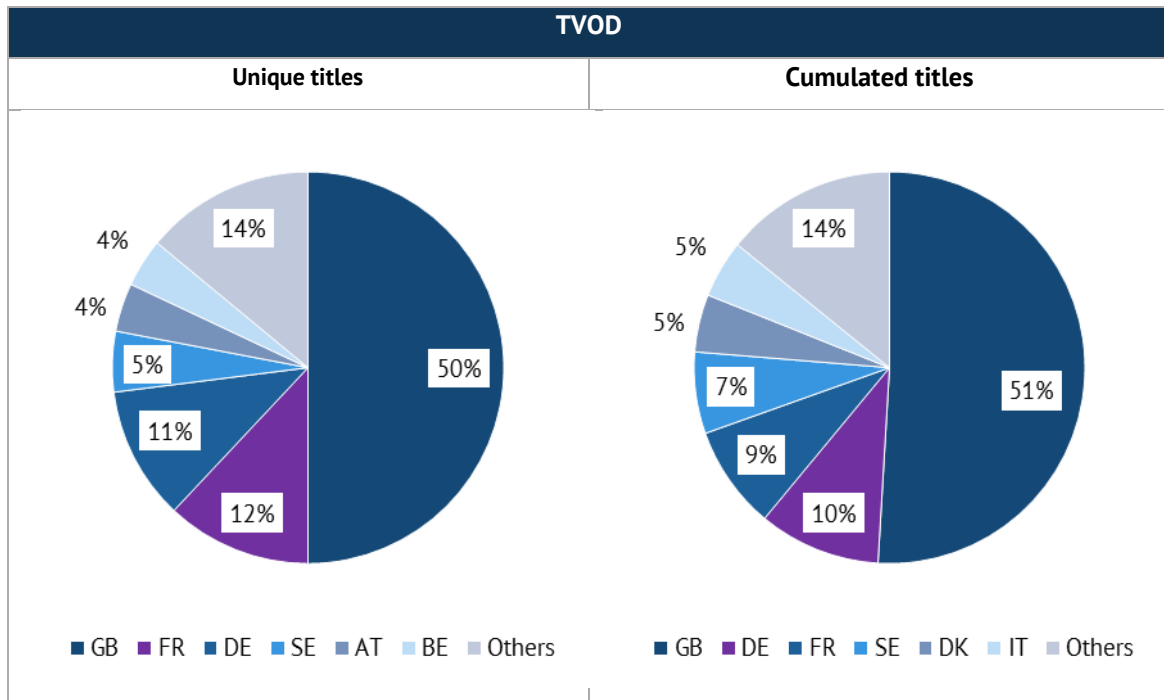
The United Kingdom in the first country of origin of non-national European fiction:

- both on **SVOD** and on **TVOD**.
- both in terms of unique (number of different TV fiction titles exported at least once) and cumulated (number of exports of TV fiction titles) titles.

The market share of UK TV fiction is higher when measured cumulatively than on a unique titles basis: not only are UK titles the most exported, but they are also exported to more countries than, on average, programmes from other European countries. France and Germany are the other two main exporters for **SVOD** and **TVOD**, but well behind the UK. Other countries appearing in the top 6 by cumulated titles include Sweden and Italy (**SVOD** and **TVOD**), Spain (**SVOD**) and Ireland and Denmark (**TVOD**).

Figure 44. Non-national European TV fiction by country of origin





Source: European Audiovisual Observatory



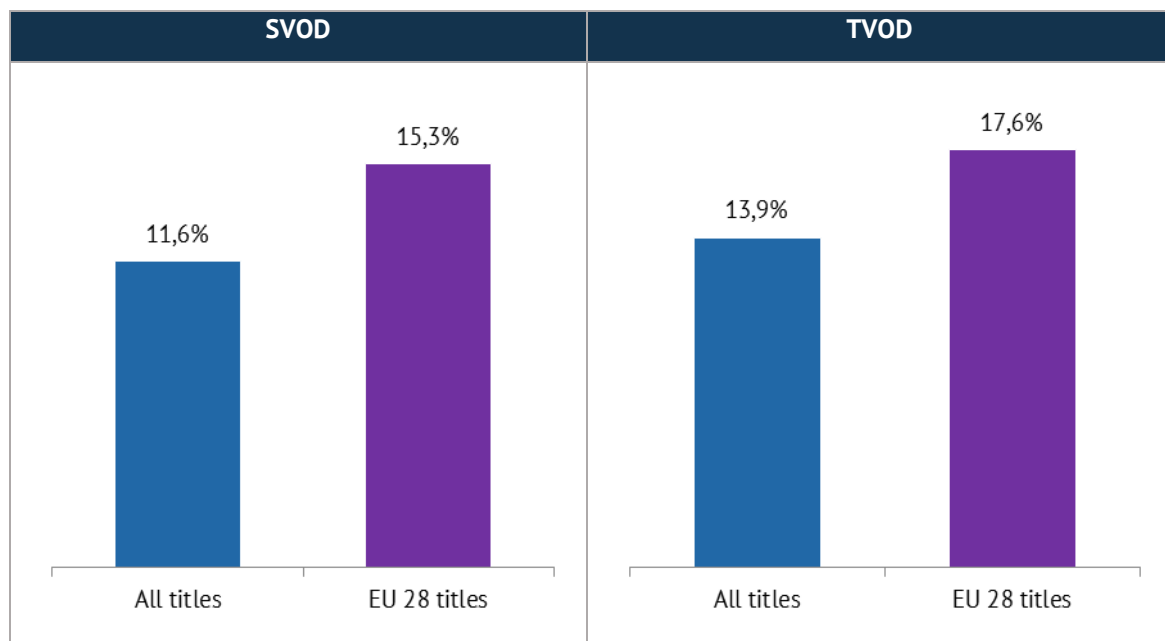


4 The circulation of co-productions

4.1 What is the share of co-productions out of available TV fiction?

Co-productions account for 11.6% and 13.9% of all titles available on **SVOD** and **TVOD**, respectively. The figures are slightly higher for EU 28 titles (15.3% and 17.6%).

Figure 45. Share of co-productions out of all cumulated available titles



Source: European Audiovisual Observatory

4.2 Do co-productions circulate better?

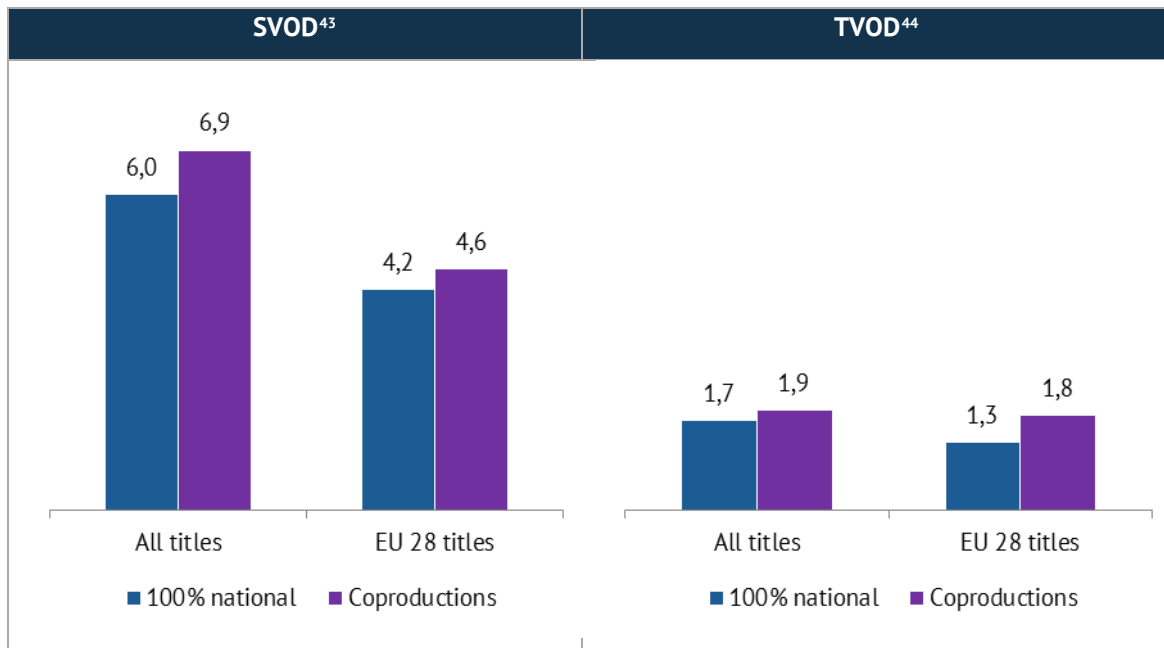
Co-productions circulate marginally better than 100% national titles, both on **SVOD** and **TVOD**.



The improved circulation can obviously be explained by easier access to the co-producing countries' VOD services. The marginality of the recorded increase is due, however, to the fact that:

- In most cases, there are only two co-producing countries.
- Certain titles were not available in all co-producing countries at the time of the research.

Figure 46. Circulation of co-productions vs. 100% national titles on SVOD and TVOD, for all titles and EU 28 titles



Source: European Audiovisual Observatory

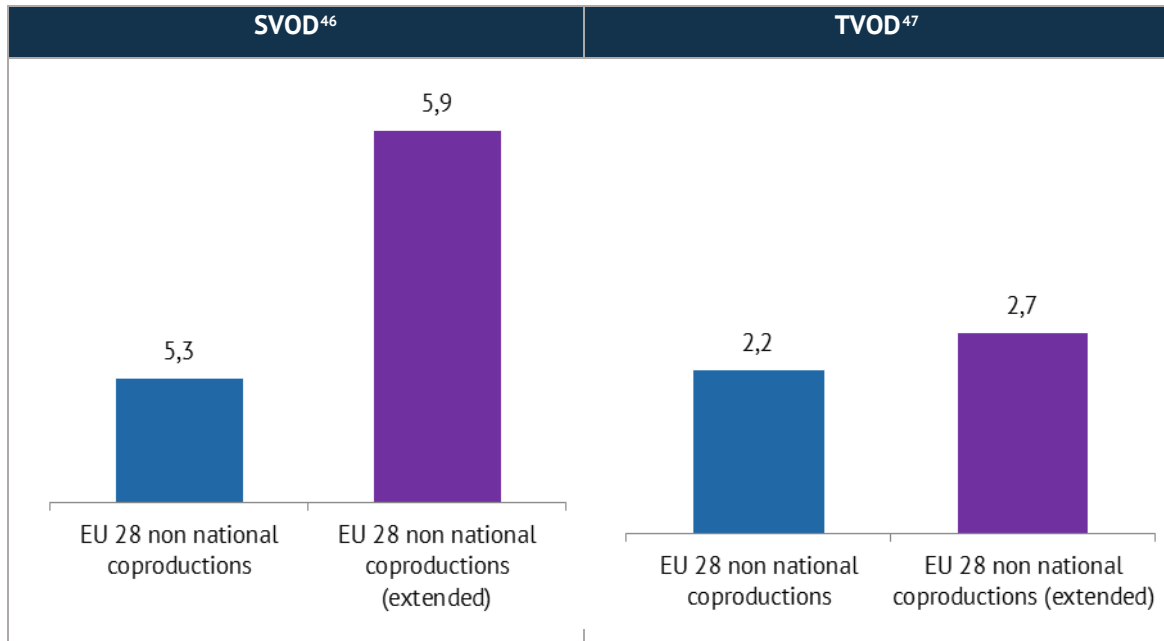
Co-productions also travel slightly better beyond the co-producing countries. The following Figure (47.) considers all co-producing countries as 'national' countries. Co-productions are still available in more territories.

⁴³ The sample includes 27 countries.

⁴⁴ The sample includes 13 countries.



Figure 47. Export of co-production unique titles on VOD in EU28 non-national and in EU28 non-national 'extended' unique titles⁴⁵



Source: European Audiovisual Observatory

4.3 Which co-productions circulate better?

On average, co-productions led by Germany (**SVOD**) Ireland, Italy and the United Kingdom (**SVOD** and **TVOD**), Denmark and Finland (**TVOD**) are see higher exports than the average EU28 co-production.

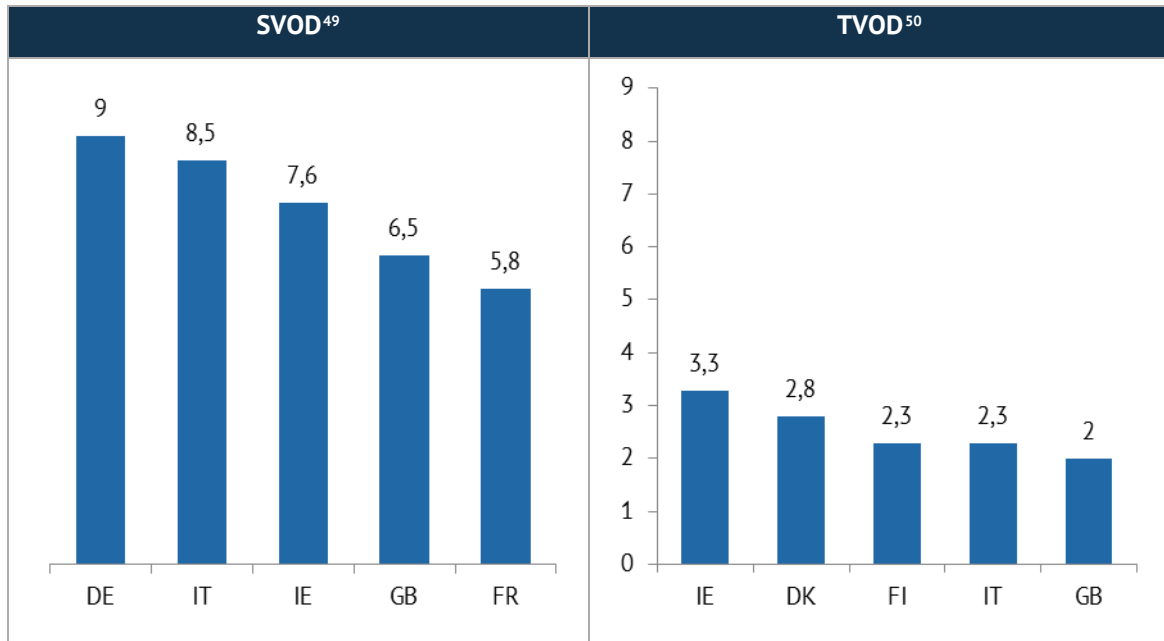
⁴⁵ Excluding all countries of origin of the work. Figure based only on European non-national titles. Therefore not directly comparable with the previous figure.

⁴⁶ The sample includes 27 countries.

⁴⁷ The sample includes 13 countries.



Figure 48. Top 5 countries by number of countries of presence beyond the country of origin of originated co-productions⁴⁸



Source: European Audiovisual Observatory

Co-productions involving a non-EU28 country tend to see higher exports than co-productions involving only EU28 countries.

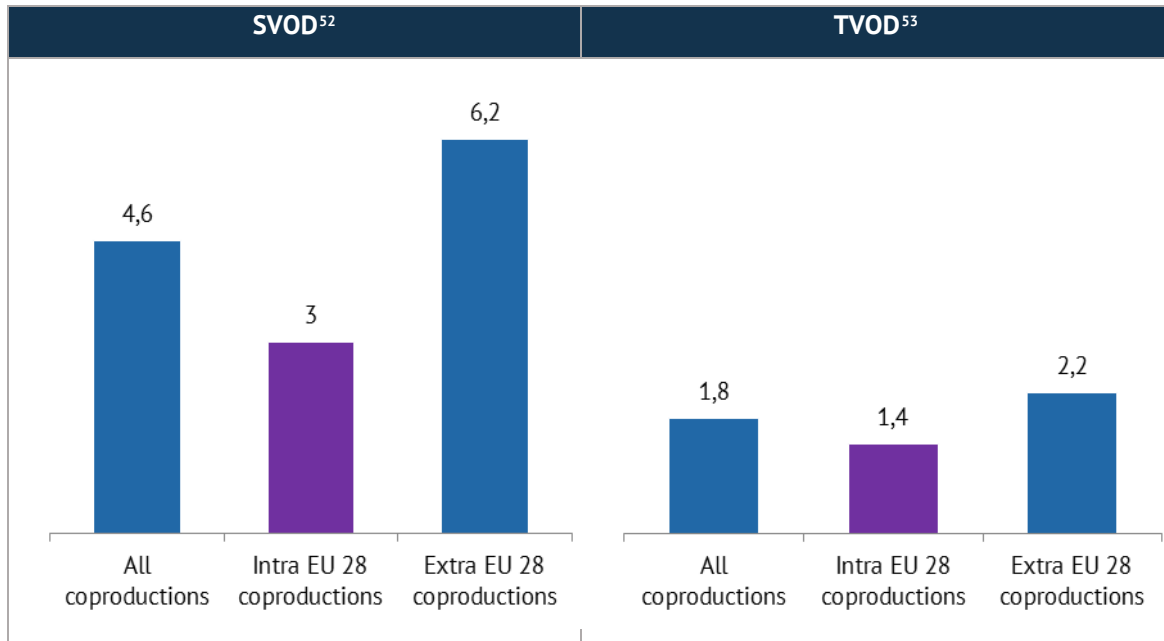
⁴⁸ Excluding the country of origin of the work.

⁴⁹ The sample includes 27 countries.

⁵⁰ The sample includes 13 countries.



Figure 49. Number of countries of availability beyond the country of origin by type of co-production⁵¹



Source: European Audiovisual Observatory

The number of co-producers, for co-productions with five or more co-producers, appears to impact only **SVOD**. As a result, this effect is apparent in only a limited number of cases in the sample.

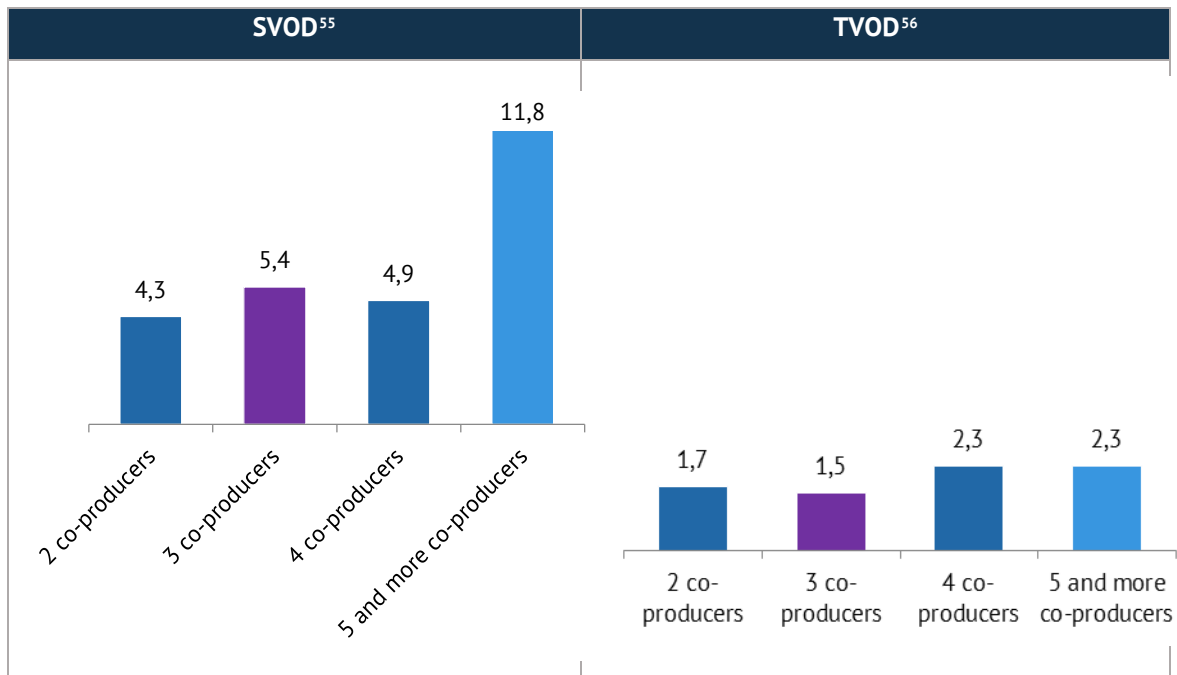
⁵¹ Excluding the country of origin of the work.

⁵² The sample includes 27 countries.

⁵³ The sample includes 13 countries.



Figure 50. Number of countries of availability by type of co-production⁵⁴



Source: European Audiovisual Observatory

⁵⁴ Excluding the country of origin of the work.

⁵⁵ The sample includes 27 countries.

⁵⁶ The sample includes 13 countries.

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