TV fiction production in the European Union

A publication of the European Audiovisual Observatory
TV fiction production in the European Union

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1. Main findings

The yearly production of TV fiction in the European Union (EU) amounts to about 920 different titles, representing over 16 400 episodes and more than 11 000 hours.

However, the term “TV fiction” represents very different categories of programmes: on the one hand, shorter formats, which can be considered to an extent as high-end TV fiction, with a certain potential for international co-productions and exports; on the other hand, long formats, typically soaps or telenovelas, with, generally speaking, lower production costs and a stronger national background and, probably, less potential for international exploitation. To differentiate the two categories of TV fiction, this report uses the number of episodes produced per year - 26 or fewer for “short formats”, “27 or more for long formats”. But these criteria do not imply that all TV fiction programmes of 26 episodes or fewer per year are high-end projects, nor that no long format programmes are bound to their country of origin.

The EU produces mostly short formats, including a significant number of TV films: A total of 44% of all fiction titles are TV films (1 or 2 episodes), and 90% of all fiction titles produced have 26 episodes or fewer produced per year, for about 3 700 hours produced. In turn, long format TV fiction programmes (i.e, titles with 26 or more episodes produced per year) represent only 10% of the number of titles produced but they account for 67% of all TV fiction hours produced, i.e. close to 7 500 hours.

Continuing TV series represent about half of the TV series produced each year¹, the other half being new projects. As TV fiction programmes with the higher number of hours produced per year tend to be more systematically renewed than shorter formats, new TV series only represent 33% of the total number of hours produced.

Germany is, by far, the leading country for production of TV fiction in the EU, in terms both of number of titles and number of hours. But, as regards the other major production countries, the size of the national market is not the only criterion. The Netherlands, for example, produces more titles than Italy or Spain.

Some countries do have a strong focus on the production of long formats. A Portuguese TV fiction programme represents on average 103 programme production hours per year. Conversely, the average number of hours produced per year and per title for a German TV fiction programme is six.

Countries focusing on long formats therefore account for a significant share of the total volume of TV fiction production. Spain and Portugal produce more hours than the United Kingdom or France; Greece, the Netherlands and Poland produce more hours than Italy thanks to their long formats with over 150 episodes produced per year. However, when

¹ Excluding TV films.
looking only at short formats (TV fiction with 26 episodes or fewer produced per year), the largest markets are the top fiction producers.

Public broadcasters are involved in the production of the vast majority (73%) of TV fiction titles. However, private audiovisual groups\(^2\), generally speaking, tend to focus their investments on a more limited number of long-running projects. An average TV fiction programme originated by a private broadcaster represents more than 25 hours produced each year vs. seven hours for a programme originated by a public broadcaster. Private broadcasters therefore account for 56% of the number of hours produced, vs. 44% for public broadcasters.

Depending on the countries, private and public broadcasters carry very different weight in the production of TV fiction. The role of private broadcasters is strong in Bulgaria, Greece, Romania, Slovenia, the Slovak Republic, Croatia, the Czech Republic, Poland, Portugal, the Netherlands and Belgium. Public broadcasters lead in Austria Denmark, Hungary, Germany, Ireland, Italy, France and the United Kingdom. The situation is relatively balanced in Sweden, Spain and Finland.

Subscription video on-demand services (SVOD) have a marginal role in TV fiction production. On average, SVOD accounts for 1.2% of the fiction titles and 0.4% of the fiction hours (i.e. 46 hours) produced in 2015 and 2016.

Germany public media broadcaster ARD\(^3\) is the leading media group in terms of number of titles and hours of TV fiction originated. ARD is followed by three private groups focusing on long format TV series: the RTL group (productions in Germany, the Netherlands, Croatia and Hungary), Central European Media Enterprises (productions in the Czech Republic, Croatia, Slovenia and the Slovak Republic) and Atresmedia (productions in Spain). The other main producers include public service broadcasters ZDF (Germany), RTVE (Spain), BBC (United Kingdom) and private groups ANT1 (Greece), TVI (Portugal) and SIC (Portugal).

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\(^2\) Including SVOD services.

\(^3\) Including fictions originated by NDR, SWR and WDR.
2. Introduction

This report aims to measure the volume of TV production in the European Union. It builds on a specific methodology designed by the European Audiovisual Observatory, and data collected from several different sources.

Data collection

As no unique TV programme production registry is available (and in particular, as in most European countries national film agencies only marginally support TV production and therefore gather data on TV production), the approach was threefold:

- The direct collection of data from the public media broadcasters in Germany, France, the United Kingdom and Italy, thanks to a partnership with the Media Intelligence Service of the European Broadcasting Union.
- An analysis of the schedules of a sample of TV channels and of a limited number SVOD services catalogues (Netflix, Amazon, ViaPlay, CanalPlay, CMore Play) to identify the first runs of TV fiction programmes. This analysis was commissioned to the European Metadata group led by Plurimedia.
- Additionally, the European Audiovisual Observatory directly collected the data for Portugal.

Definition of TV fiction

“TV fiction” includes scripted TV movies and TV series. It does not include animation programmes.

Accounting of TV series

To simplify the matching between year of production and year of broadcasting, and to avoid cut-off effects between two years, for a given year the full season of TV series whose first episode was first aired during that year was accounted for (even if not all the episodes of the season were aired). Conversely, TV series whose first episode was aired before that year were not taken into account for that year (even if some remaining episodes of the season were aired).

Collections of TV movies were considered as a TV series.

Country of origin

The country of origin was attributed using the imdb database. In the event of co-production, the country of origin was attributed to the main producing country according to imdb, to avoid double counting. A first broadcast of a German production (as stated in imdb) in Austria or of a French production in Belgium was attributed, respectively, to Germany and France.

Sample of countries
The audiovisual services tracked belong to 23 EU countries. Five countries could not be analysed for lack of a national source for data: Cyprus, Estonia, Latvia, Lithuania and Luxembourg.

**Sample of Audiovisual services**

Starting from the assumption that smaller broadcasters mainly rerun existing shows, the sample comprises the main TV channels in each country as well as a limited number of SVOD services, i.e. a total of 102 services:

- 52 private channels
- 45 public channels
- 5 SVOD services

The complete list of audiovisual services included in the sample can be found in the annexes of this report.

**Time period**

The data was collected for 2015 and 2016. However, to limit the impact of variations between years due to the launch or cessation of new TV fiction series, all figures provided in this report are yearly averages for 2015 and 2016.
3. Volume of TV fiction production in the European Union

3.1. More than 11 000 hours of TV fiction produced each year

On average, 922 TV fiction titles were produced annually in the European Union between 2015 and 2016. These 922 titles represented over 16 400 episodes and over 11 000 hours.

Figure 1. Average number of titles, episodes and hours of TV fiction produced per year in the EU 2015-2016

3.2. TV series with 26 episodes or fewer produced per year account for 90% of titles produced.

EU TV fiction projects generally tend to be short. A total of 44% of all fiction titles are TV movies (one or two episodes). Of all fiction titles produced, 90% have 26 episodes or fewer produced per year.
Figure 2. Breakdown of titles produced by number of episodes produced each year

- 1-2: 7%
- 3 to 13: 5%
- 14 to 26: 41%
- 27 to 52: 44%
- More than 52: 3%

Shorter TV fiction projects of 26 episodes or fewer produced in the same year – some of which can be considered as high-end fiction and may have a potential for international distribution - account for 33% of the total number of hours produced.

Figure 3. Breakdown of hours produced by number of episodes produced per year

- 1-2: 6%
- 3 to 13: 7%
- 14 to 26: 21%
- 27 to 52: 60%
- More than 52: 6%
3.3. Long-running telenovelas and soaps account for the majority of hours produced

Only 10% of the titles produced, typically telenovelas or soaps with a strong national background, have more than 52 episodes produced each year. But they account for 65% of the total number of hours of TV fiction produced.

Figure 4. Share of short and long TV series in number of titles and hours produced

![Graph showing share of short and long TV series in number of titles and hours produced.](image)

Figure 5. TV series top 20 by number of hours produced annually - 2015

<table>
<thead>
<tr>
<th>Country</th>
<th>Channel</th>
<th>Original title</th>
<th>Season</th>
<th>Episodes</th>
<th>Min per episode</th>
<th>Total duration (h)</th>
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<td>Min per episode</td>
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<td>43</td>
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European Audiovisual Observatory
3.4. New seasons of existing TV series represent about 70% of hours produced

Excluding TV films (of one or two episodes), about 520 TV fiction titles are produced each year. **About 50% of these titles are new**, whereas the other half constitute the continuation of an ongoing TV series.

**Figure 7.** Number of titles of new and continuing TV series (excluding TV films)

TV fiction productions, with the larger number of hours produced per year, tend to be more systematically renewed than shorter formats. Therefore, new TV series only represent 33% of the total number of hours produced (excluding TV movies).
Figure 8. Number of hours of new and continuing TV series (excluding TV films)

European Audiovisual Observatory
4. Countries of production

4.1. Germany produces by far, the highest number of titles followed by France and the United Kingdom

Germany stands out with production of 36% of all fiction titles in the EU. France (17%) and the United Kingdom (12%) follow at a distance. The Netherlands, despite its relatively smaller market size, produces a higher share of fiction titles (5%) than Italy (4%) or Spain (4%).

Figure 9. Breakdown of number of TV fiction titles produced in the EU by country of origin – average 2015-2016

4.2. In number of hours produced, leader Germany is followed by Spain and Portugal

The top 15 list of TV fiction production countries by number of hours does not quite match the top 15 list by number of titles. Germany is again the leader in terms of share of total
fiction hours produced (19%), but is followed by Spain (13%), Portugal (10%), the United Kingdom (10%), and France (6%). Greece, the Netherlands and Poland, meanwhile, produce more hours than Italy.

The ranking is influenced by the focus on long formats, such as soaps and telenovelas, in certain countries. Please refer to section 3.3 for examples of long format TV series.

**Figure 10. Breakdown of number of TV fiction hours produced in the EU by country of origin – average 2015-2016**

The picture is quite different when looking only at TV fiction programmes with 26 or fewer episodes produced per year. Here, the largest markets are the top fiction producers in number of hours.
Figure 11. Breakdown of number of hours of TV fiction produced in the EU by country of origin (26 episodes or fewer per year and per TV series)- average 2015-2016

4.3. Differences in fiction production patterns

The difference between the ranking in number of titles and ranking in number of hours is linked to the fact that some countries tend to favour a limited number of TV fiction series produced each year, but with a large number of episodes. In turn, other countries focus on shorter formats. Portugal, for example, produced only 11 TV series on average in 2015 and 2016. But each TV series produced represented an average of 103 hours of programmes. Similarly, the high ranking of Spain or Greece in terms of hours produced is linked to the duration of each of the TV series they produced: 39 and 58 hours, respectively. Conversely, Germany, the United Kingdom and France produced a relatively low number of hours of TV fiction each year: six, 10 and five hours, respectively.
This difference in the average number of episodes per year (which may be considered to an extent as a criterion for distinguishing between high-end TV series with a potential for export on the one hand, and long-running soaps or telenovelas with a strong national background on the other) translates into different structures of TV fiction production.
A classification of countries can be drawn up using on the one hand the volume of production in hours and on the other the share of the production volume dedicated to long formats (i.e. TV fiction programmes with more than 26 episodes per year). Four categories can be identified:

- Countries with a higher production volume, with a clear focus on longer formats, typically Spain, Portugal or Greece.
- Countries with a higher production volume, with a clear focus on shorter formats, typically Germany, the United Kingdom, France or Italy.
- Countries with a lower production volume, with a clear focus on longer formats, typically Slovenia or Croatia.
- Countries with a lower production volume, with a clear focus on shorter formats, typically Finland, Austria or Sweden.

Please note that the classification relies on medians and not on averages.
Figure 14. Mapping of countries by number of hours produced and share of long formats
5. Audiovisual groups involved in the production of TV fiction

5.1. Public broadcasters produce more titles; private broadcasters produce more hours

Public broadcasters account for 73% of TV fiction titles produced per year on average in 2015 and 2016, vs. 27% for private broadcasters and SVOD services.

Figure 15. Breakdown of number of titles produced by statute of service

Private broadcasters and SVOD services, in turn, account for 56% of the number of hours produced, vs. 44% for public broadcasters.
5.2. Public broadcasters focus more on shorter formats, private broadcasters less on long-running TV series

When looking specifically at TV fiction with 26 or fewer episodes produced per year, public broadcasters have a clear edge over private broadcasters. They account not only for 77% of titles produced, but also for 66% of hours produced.
The focus of private broadcasters on longer formats is confirmed by the analysis of the average number of hours produced each year per title. **An average TV fiction programme originated by a private broadcaster represents more than 25 hours produced each year vs. seven hours for a programme originated by a public broadcaster.**
European Audiovisual Observatory
5.3. **Contrasting situations with regard to respective weight of private and public broadcasters**

Depending on the countries, private and public broadcasters carry very different weight in the originating of TV fiction. The role of private broadcasters is especially high in Bulgaria, Greece, Romania, Slovenia, the Slovak Republic, Croatia, the Czech Republic, Poland, Portugal, the Netherlands and Belgium. Public broadcasters have the lead in Austria, Denmark, Hungary, Germany, Ireland, Italy, France and the United Kingdom. The situation is relatively balanced in Sweden, Spain and Finland.

**Figure 18. Share of public and private audiovisual services in the production of TV fiction (in %)**

A classification of countries can be created using on the one hand the volume of production in hours and on the other the share of public service broadcasters in the origination of TV fiction. Four categories can be identified:

- Countries with a higher production volume, led by public service broadcasters, typically Germany, France or Italy.
- Countries with a higher production volume, led by private media groups, typically Portugal, the Netherlands or Poland.
- Countries with a lower production volume, led by public service broadcasters, typically Austria or Denmark.

---

5 Please note that the classification relies on medians and not on averages.
- Countries with a lower production volume, led by private media groups, typically Croatia or Slovenia.

Figure 19. Mapping of countries by number of hours produced and share of PSBs in production
5.4. SVOD role in TV fiction production remains marginal

This section builds on the analysis of the main SVOD services which, in 2015 and 2016, were likely to have invested in the production of original content: Netflix, Amazon, ViaPlay, CanalPlay and CMore Play. On average, these SVOD services account for 1.2% of the fiction titles and 0.4% of the fiction hours (i.e. 46 hours) produced in 2015 and 2016. Even though SVOD services are growing fast, the figures for 2016 were, respectively, only 1.5% and 0.6%.

Figure 20. Titles and hours of TV fiction produced by SVOD services (in units and hours)

All 5 services in the sample invested in original content. It should be noted that:

- Services such as CMore Play and ViaPlay premiered TV series that were also to be broadcast on the groups’ TV channels.
- Netflix and Amazon coproduced TV series with broadcasters:
  - As regards Amazon, the two TV series which were identified (“The Collection” and “Fleebag”) were coproductions (with BBC and France Télévisions and with BBC respectively).
  - As regards Netflix, 2 of the 7 TV series identified were coproductions (“Crazy Heads” and "Dirk Gently's Holistic Detective Agency", coproduced respectively with Channel 4 and BBC), the other being 100% funded (“The Crown”, “Black Mirror”, “Marseille”, “Lovesick” and “Residue”).
Figure 21. Breakdown of fiction produced by SVOD service
5.5. ARD originates the highest number of TV fiction titles and TV fiction hours

Since public broadcasters lead in terms of number of fiction titles produced, they naturally also figure strongly in the ranking of the main groups in terms of number of fiction titles produced: 12 of the top 20 groups are public.

Table 1. Top 20 TV groups by number of TV fiction titles originated – average 2015-2016

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<th>Group</th>
<th>Number of titles</th>
</tr>
</thead>
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<td>ARD</td>
<td>171</td>
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<tr>
<td>ZDF</td>
<td>144</td>
</tr>
<tr>
<td>France Télévisions</td>
<td>83</td>
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The results are different when considering the number of hours produced. ARD still leads the ranking, but is followed by three private groups focusing on long-running TV series with a large number of episodes produced each year.
Table 2.  Top 20 TV groups by number of TV fiction hours originated – average 2015-2016

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European Audiovisual Observatory
6. Annexes

6.1. Detailed figures
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