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UK TV Exports Report

2021-22

November 2022

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Key Findings



£1,521 million

2021/22 UK TV international exports

41% exports

North America

64% exports

Finished programming

39% VOD

Finished programme sales

UK television exports in 2021/22 increased 7% year-on-year, a bounce-back from the COVID-19 pandemic influencing decline last year.

Despite an 11% year-on-year decrease the USA continues to be the most important market for exports, contributing £510m (34% of all exports), which followed a trend defying year of growth in 2020/21. A number of European markets grew >20% this year, with the Nordics, Germany, Netherlands and Italy all growing >40%.

Australia remains in second place (£118m) and France in third (£93m), with the top five positions all holding this year.

TV sales remain the largest source of income (64%), with 39% finished programme sales to VOD.

92% respondents highlighted concerns for the business coming from the increased costs of production.

UK TV Exports Report A Return to Growth

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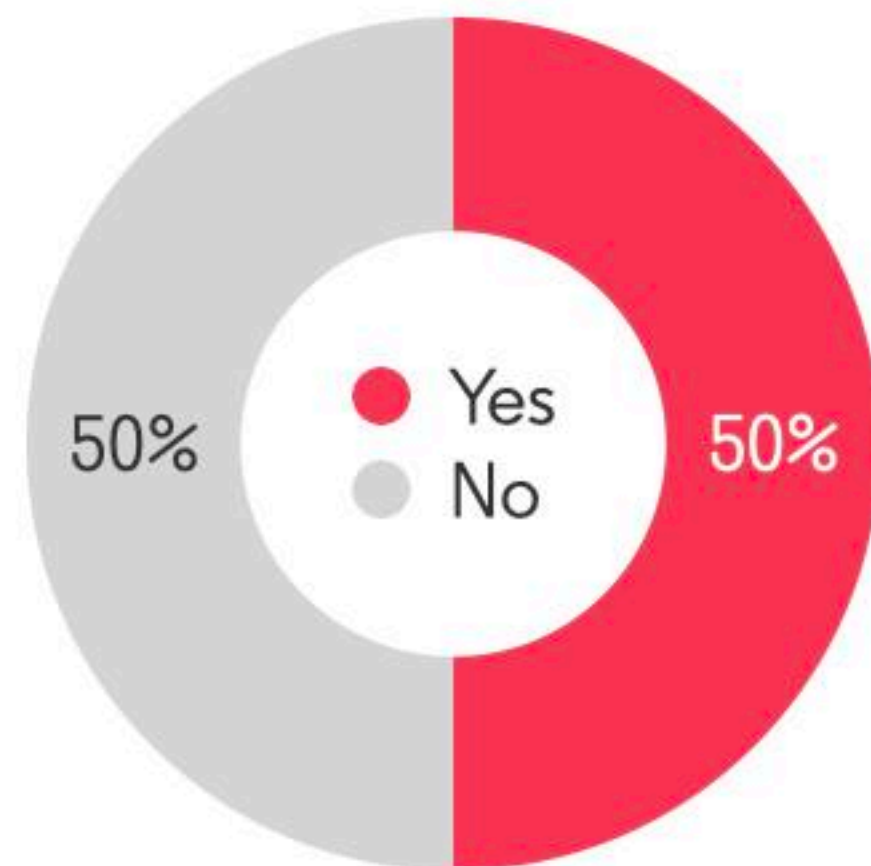
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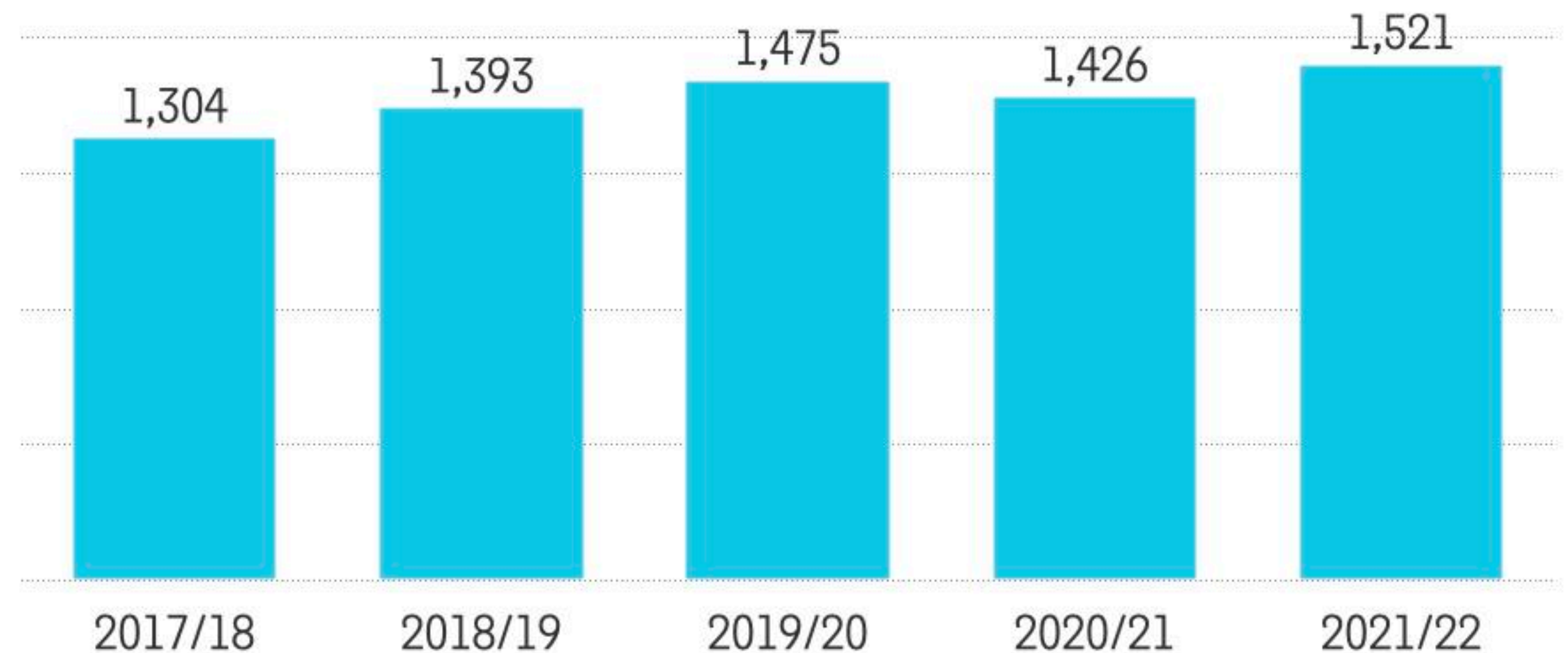
Total UK TV Exports returned to growth in 2021/22 after a COVID-19 pandemic induced contraction of 3% (£49M) in 2020/21, with exports now up £95M on 2019/20 levels

Distributors surveyed were split down the middle in terms of whether there had been any increase in demand for older library content. Library sales (content aged 4+ years) comprised 30% of revenues this year, marginally down from 33% in 2020/21 but still up on previous years (22% in 2019/20).

Has there been an increase in demand for library content?



Total (£M) UK TV international exports



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Top Twenty Export Markets

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The USA remains the key export destination for UK content (£510M) but following last years trend breaking growth posted a decline of 11% this year.

The top five markets remain unchanged with Australia, France, Canada and Germany showing strong growth.

The decline of the US market has been offset by very strong growth in a number of markets, most notably in Europe with Germany, the Nordics and the Netherlands all near 50% growth, with the Netherlands and Italy both rising up the rankings.

Spain and Japan reported falls this year, but like the US they defied trends last year and 21/22 revenues remain above 19/20 levels. The remaining countries showing falls this year include China, Russia, Poland and South Africa.

Rank	Country	Total Revenues		2019	
		(£M)	YOY%	Rank	
1	USA	510	-11%	1	-
2	AUSTRALIA	118	25%	2	-
3	FRANCE	93	28%	3	-
4	CANADA	92	32%	4	-
5	NORDICS	92	48%	5	-
6	GERMANY	86	49%	6	-
7	NETHERLANDS	35	49%	9	▲
8	ITALY	31	41%	11	▲
9	NZ	25	6%	9	-
10	CHINA	22	-36%	8	▼
11	SPAIN	22	-40%	7	▼
12	INDIA	19	3%	12	-
13	BELGIUM	14	7%	15	▼
14	SOUTH AFRICA	14	-11%	14	-
15	RUSSIA	11	-30%	13	▼
16	TURKEY	10	23%	18	▲
17	JAPAN	9	-20%	16	▼
18	POLAND	8	-20%	17	▼
19	BRAZIL	8	27%	19	-
20	MEXICO	8	31%	20	-

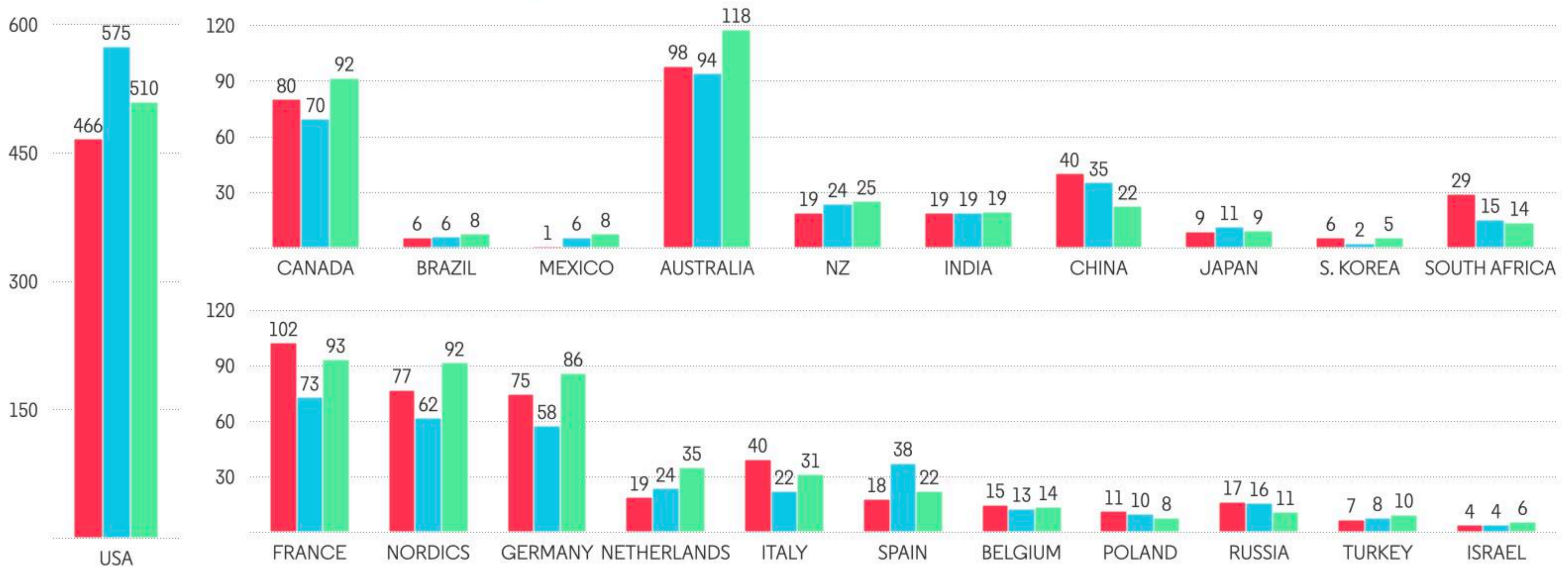
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Export Markets



A number of markets have not returned to pre-COVID levels (2019/20), notably China (-44%), Russia (-33%), South Africa (-53%) and Poland (-29%), with Italy (-20%) and France (-9%) up year-on-year but still not back to 2019/20 levels.

Total Exports Revenues (£M) 2019/20, 2020/21, 2021/22



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Exports by Territory: Macro Regions

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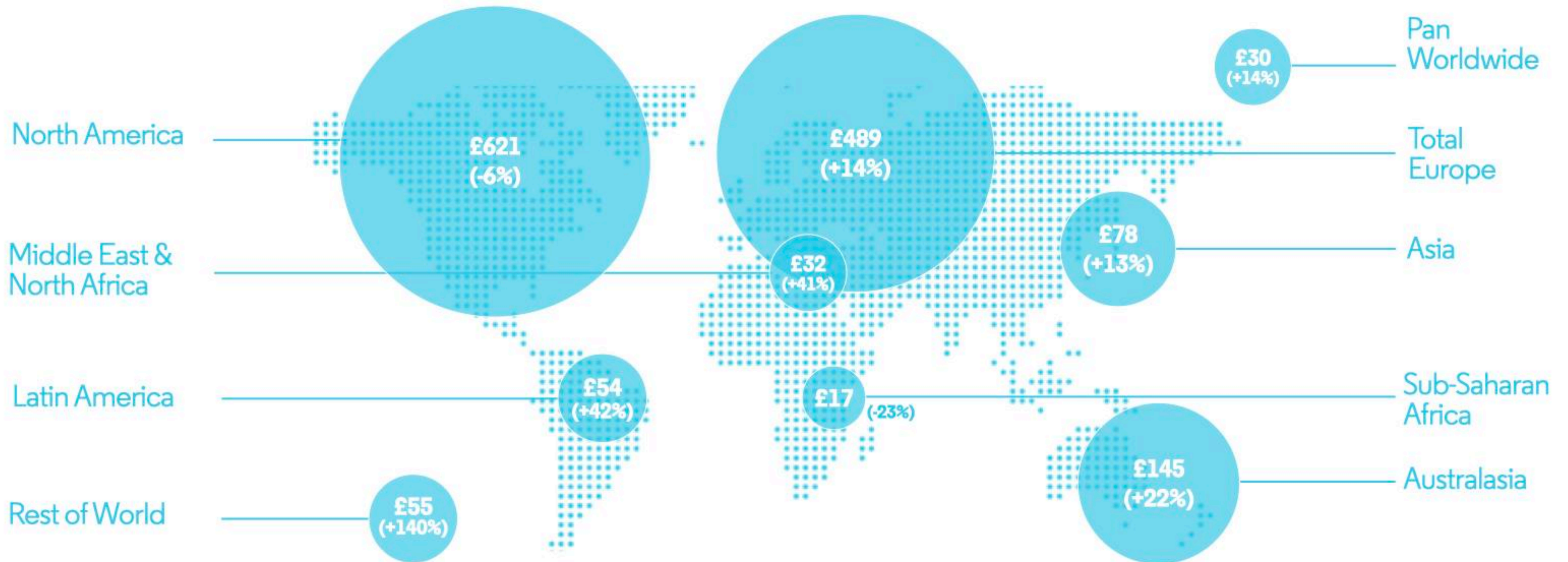
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MENA and Latin America both grew over 40%, whilst other regions saw double digit growth. Only Sub-Saharan Africa followed last years 31% decline with another fall, whilst North America showed a decline after growing 16% last year.

Exports by Territory (£M) - 2021/22



% figures shown are year on year change

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Sales by Type

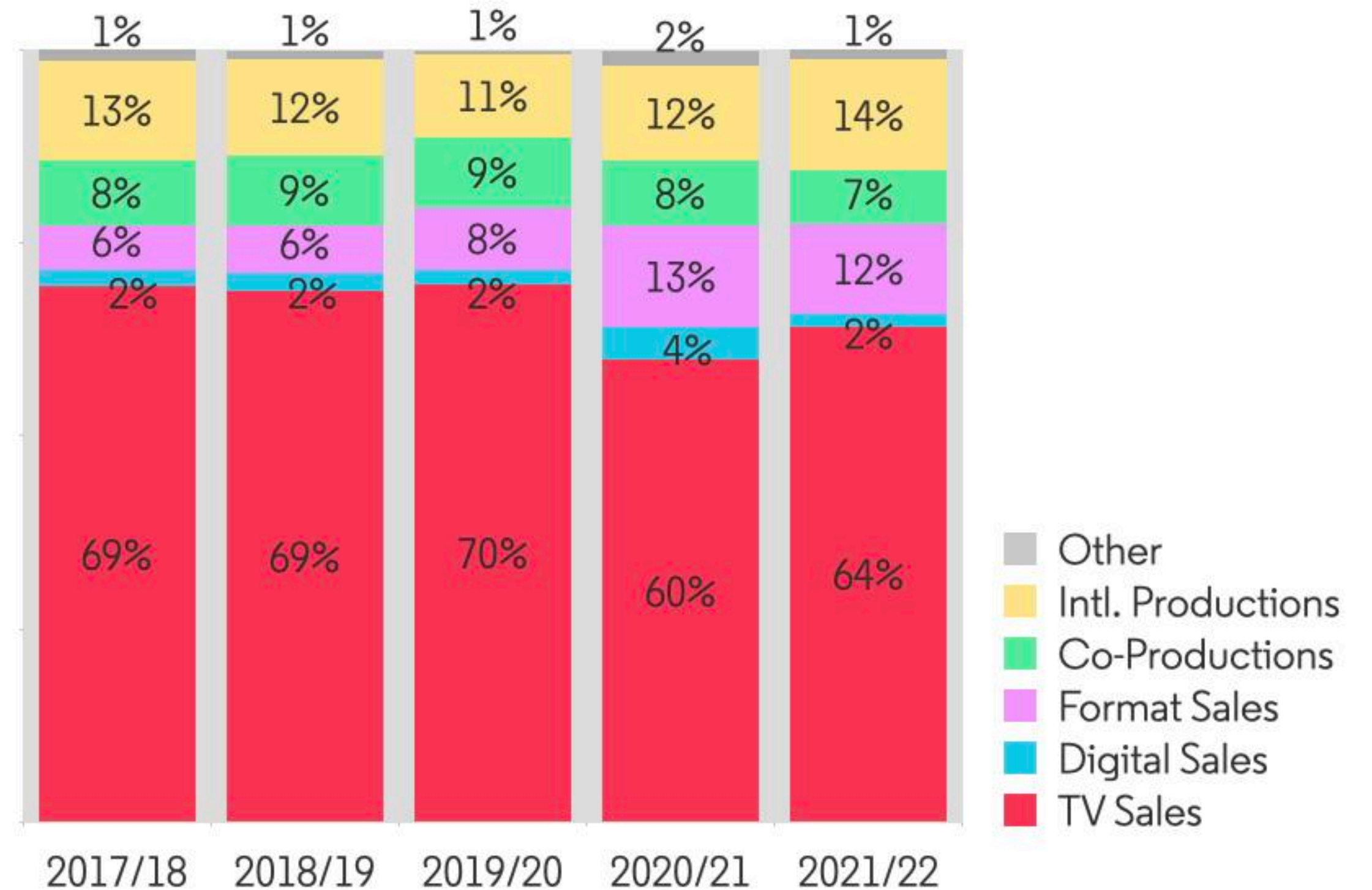


Finished programme sales (£996M) remains the largest contributor of all export revenue.

This year's results include a correction to last year's categorisation that highlight strong and consistent growth of Formats over the last few years, with Formats now representing 12% of export revenues. This follows an upbeat market for Formats (both scripted and unscripted) during 2020/21 as global broadcasters looked to recover production quickly following COVID-19 restrictions.

After growth in Digital Sales (TVOD & EST) during the pandemic year the category lost share and returned to 2019/20 levels.

UK Television Exports by Sales Type



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Sales by Type

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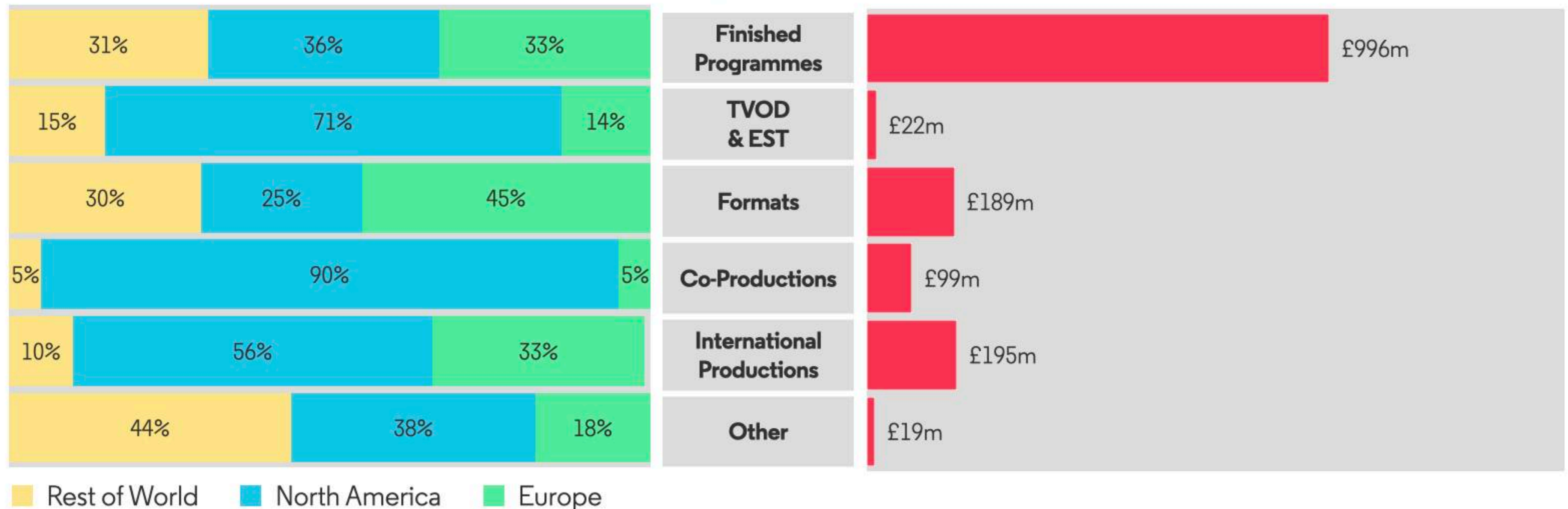
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A significant share of revenues through Co-Production and International Productions continues to come from North America, whilst Europe and the Rest of the World take a comparatively higher share of the Format market. Digital Sales through TVOD & EST as a category saw the highest fall, following last years 'stay-at-home consumption' growth.

Sales by Type - FY 2020/21



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Markets with Growth Potential

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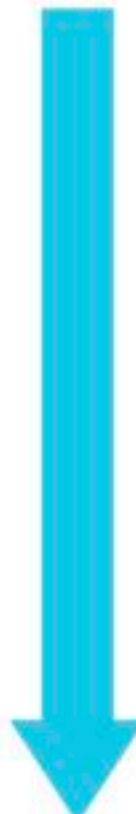
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This year there were over twenty different markets or regions identified by respondents as being key areas for growth, with most areas of the globe identified by at least one respondent.

Regional Mentions (weighted)	
TOP	Asia
	Latin America
	North America
	Western Europe
	MENA
	Australia
	Eastern Europe

Territorial Mentions (weighted)	
TOP	USA
	China
	India
	Germany
	Canada
	France
	Mexico

No. 01 Ranked by Respondents	
TOP	USA
	China
	India
	Canada
	Mexico
	France
	India

Other mentions included Benelux, Brazil, Middle East, Poland, South Korea and Turkey, in addition to identifying South East Asia and Central Europe.

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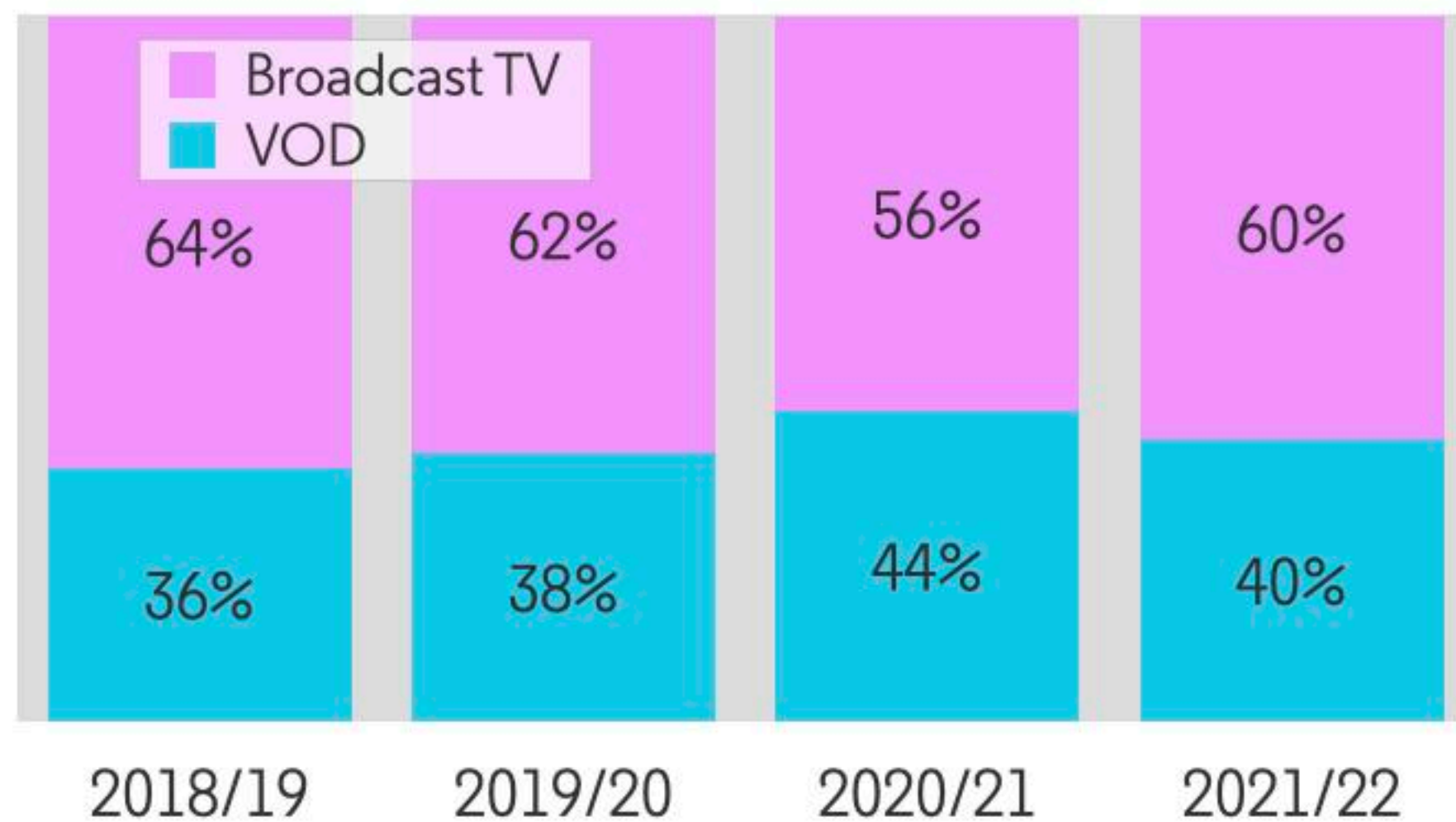
TV Sales by Service Type



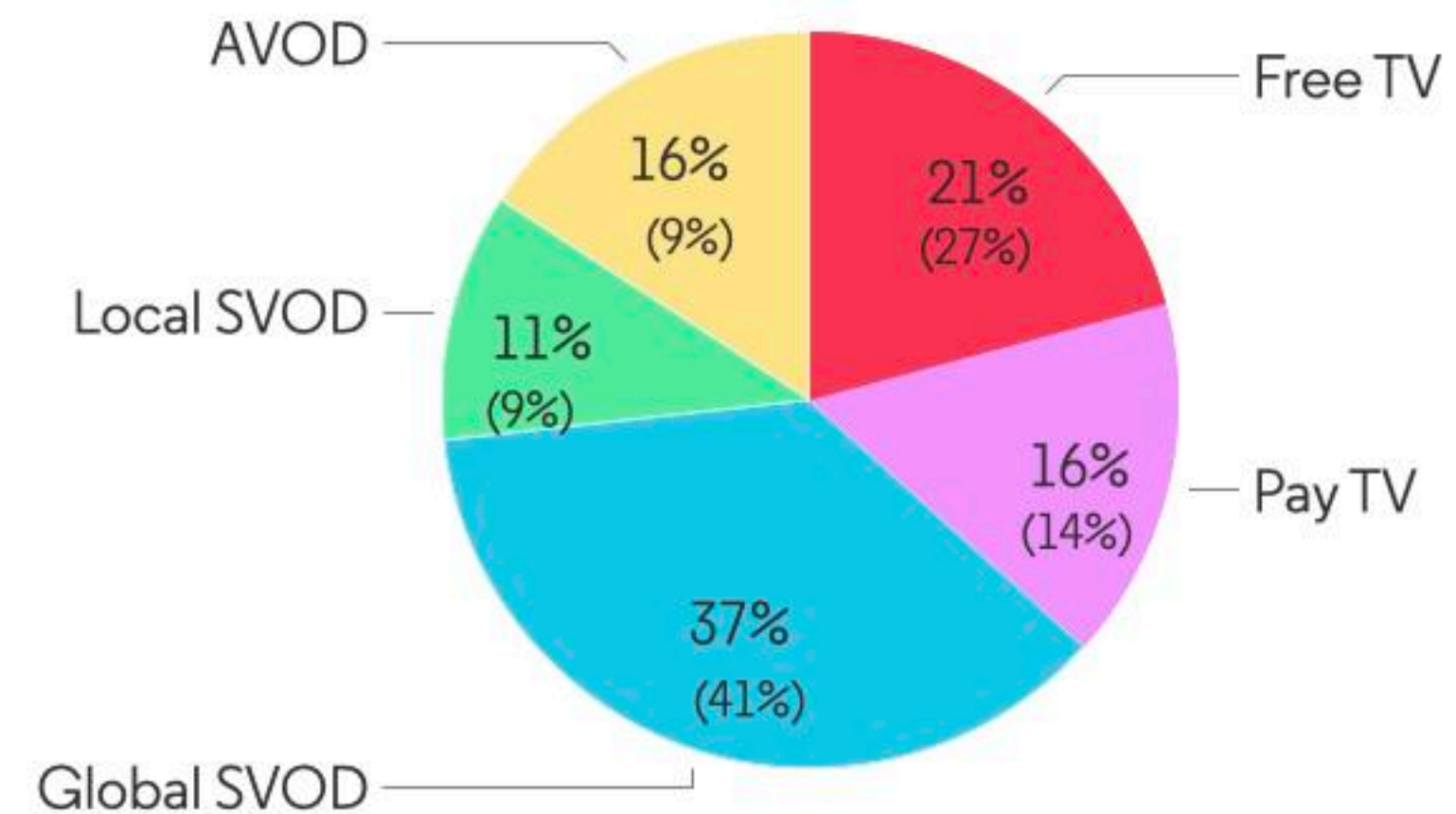
Defying recent trends sales to VOD services actually showed a fall in their share of total TV sales, perhaps illustrating the resilience of some global broadcasters who now represent 60% of total TV finished programming sales. The changing face of the media and entertainment industry is reflected in the service targets for future sales activity.

37% (down from 41%) of distributors named Global SVOD as their priority, ahead of Free TV (21%) and Pay TV (16%). AVOD is now viewed as the priority for 16% distributors, showing noticeable growth from 9% last year.

TV Sales by Service Type



% Distributors Ranking the Service Type as Most Important



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Sales to SVOD

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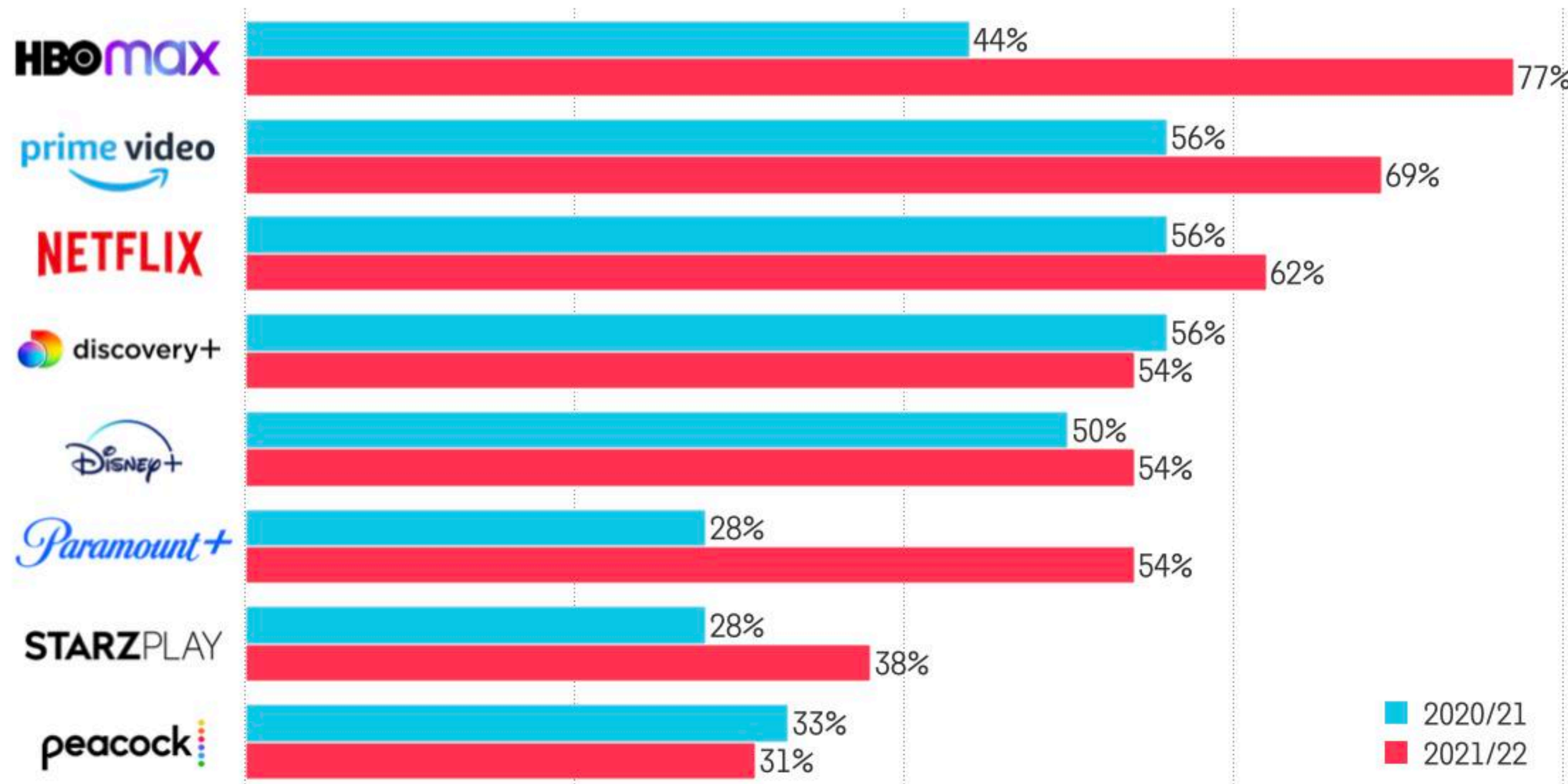
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% Distributors with Finished Programme Sales to SVOD



HBO Max, Amazon and Netflix have acquired at least one programme from over 60% respondents - up significantly from last year.

Nearly all services showed an increase in the number of distributors doing business with the, with only Peacock and Discovery+ showing a marginal fall.

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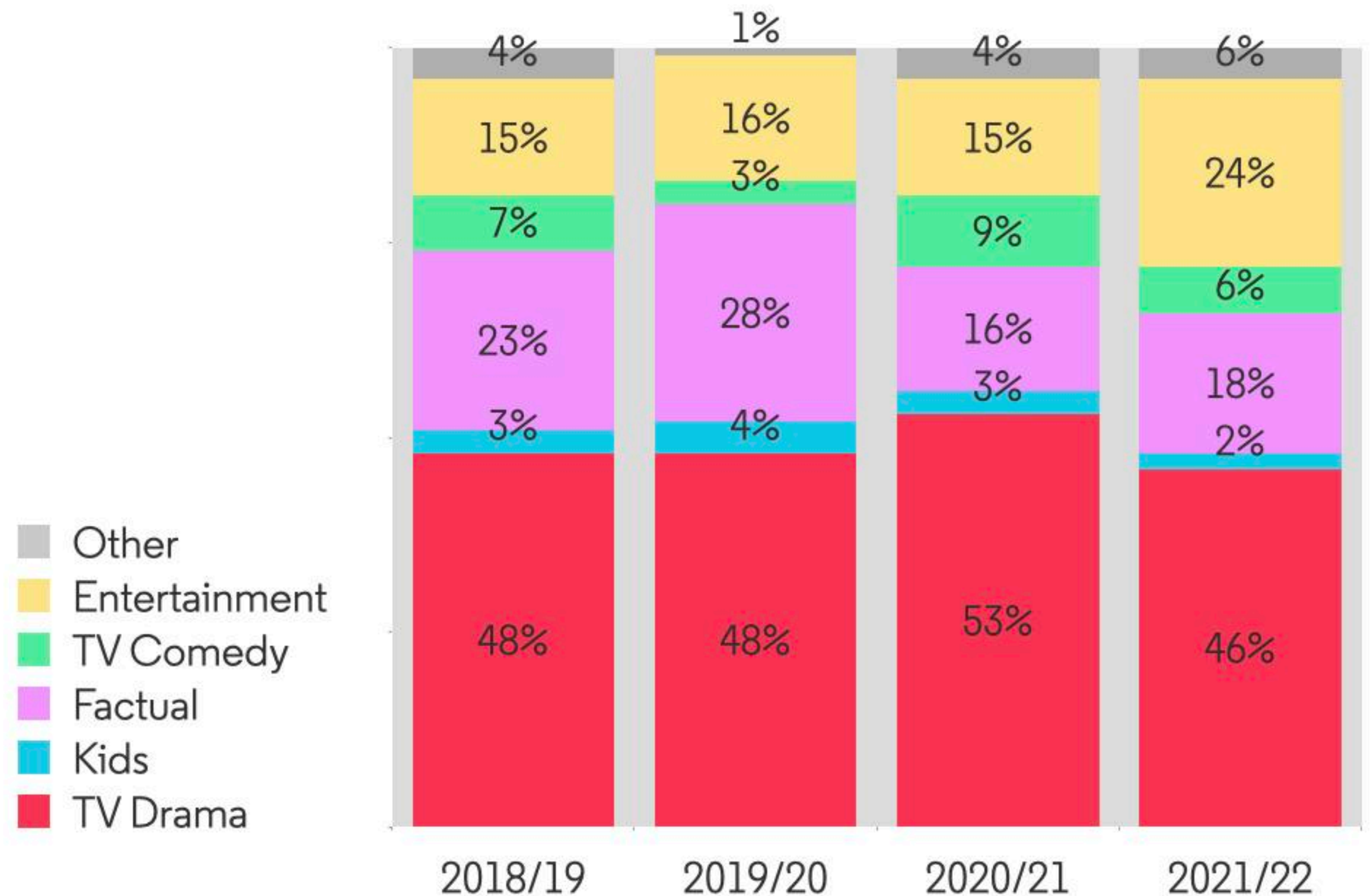
Sales by Genre



Scripted drama remains the key driver of international exports for UK companies, and is the source of 46% of all revenue.

This year the Entertainment category saw a significant growth in share to 24% Content Sales.

Content Sales Split by Genre

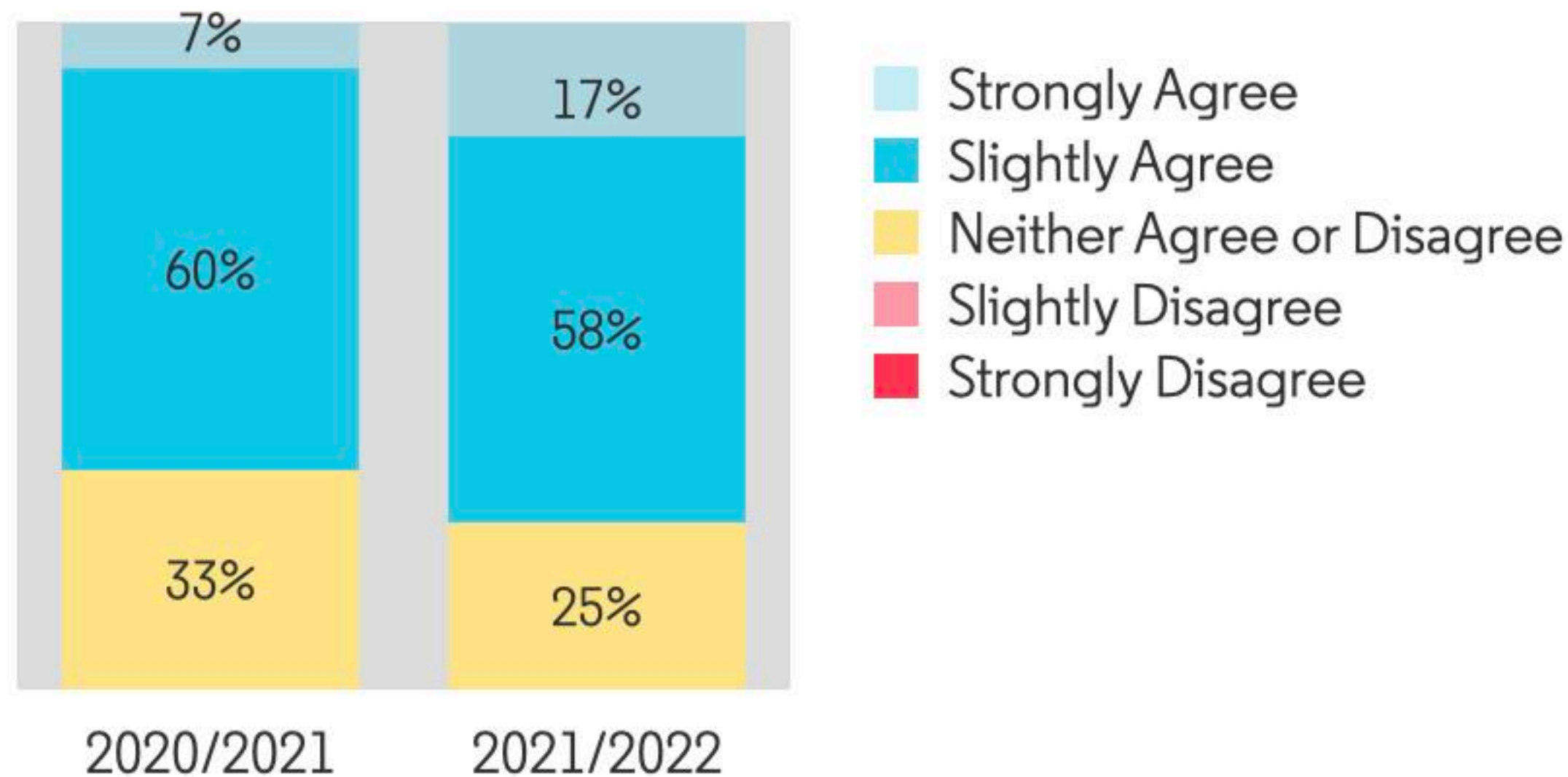


UK TV Exports Report Streamer Co-Productions

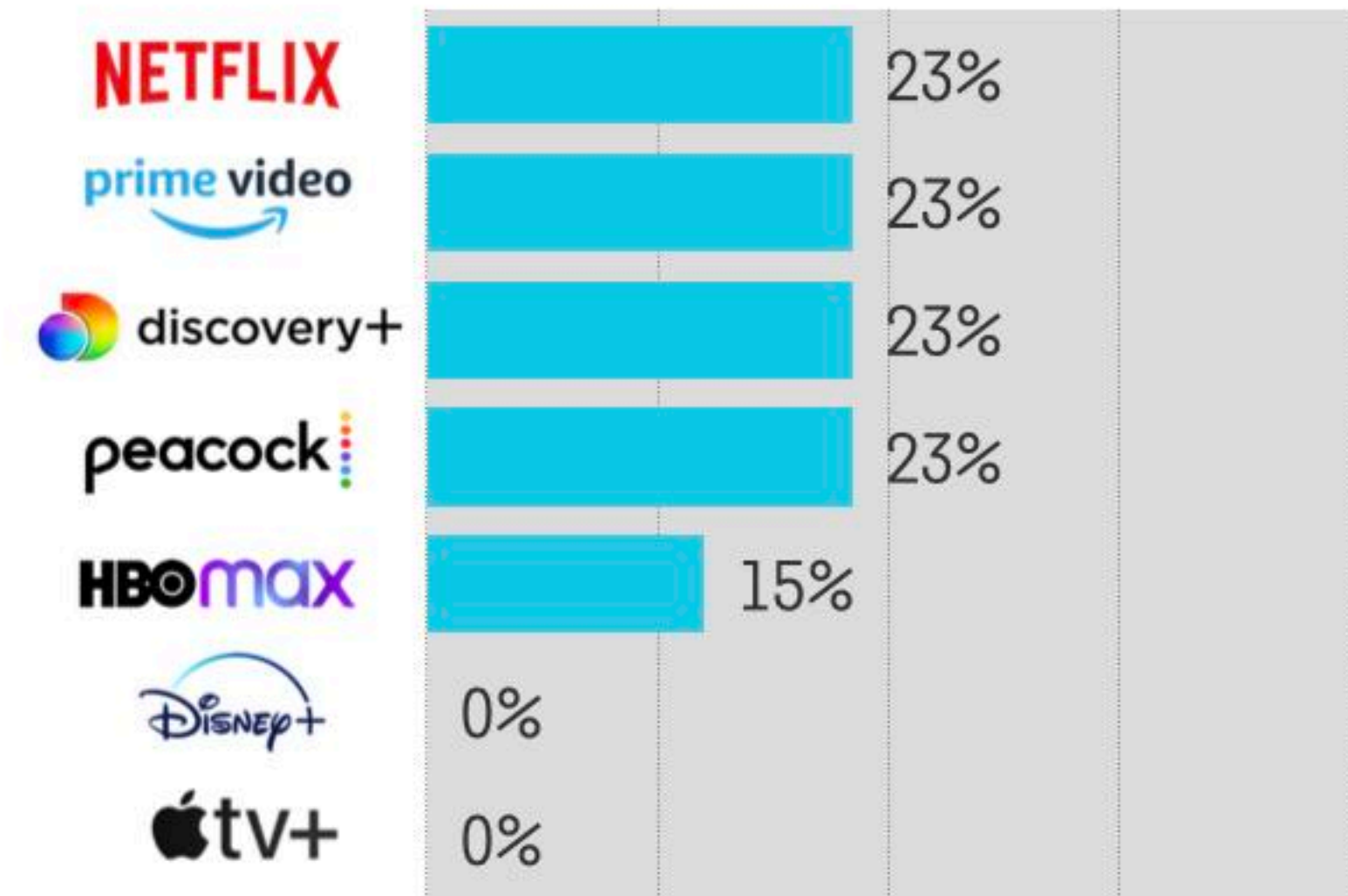


Global Streaming services are increasingly seen as an attractive opportunity as Co-Production partners on new content. This year 23% of respondents reported partnerships with Netflix, Amazon, Discovery+ and Peacock, with HBO Max close behind and no other co-productions reported during the period.

“Global D2C services are becoming an increasingly attractive co-production partner”



Co-Production Partner
% of Distributors



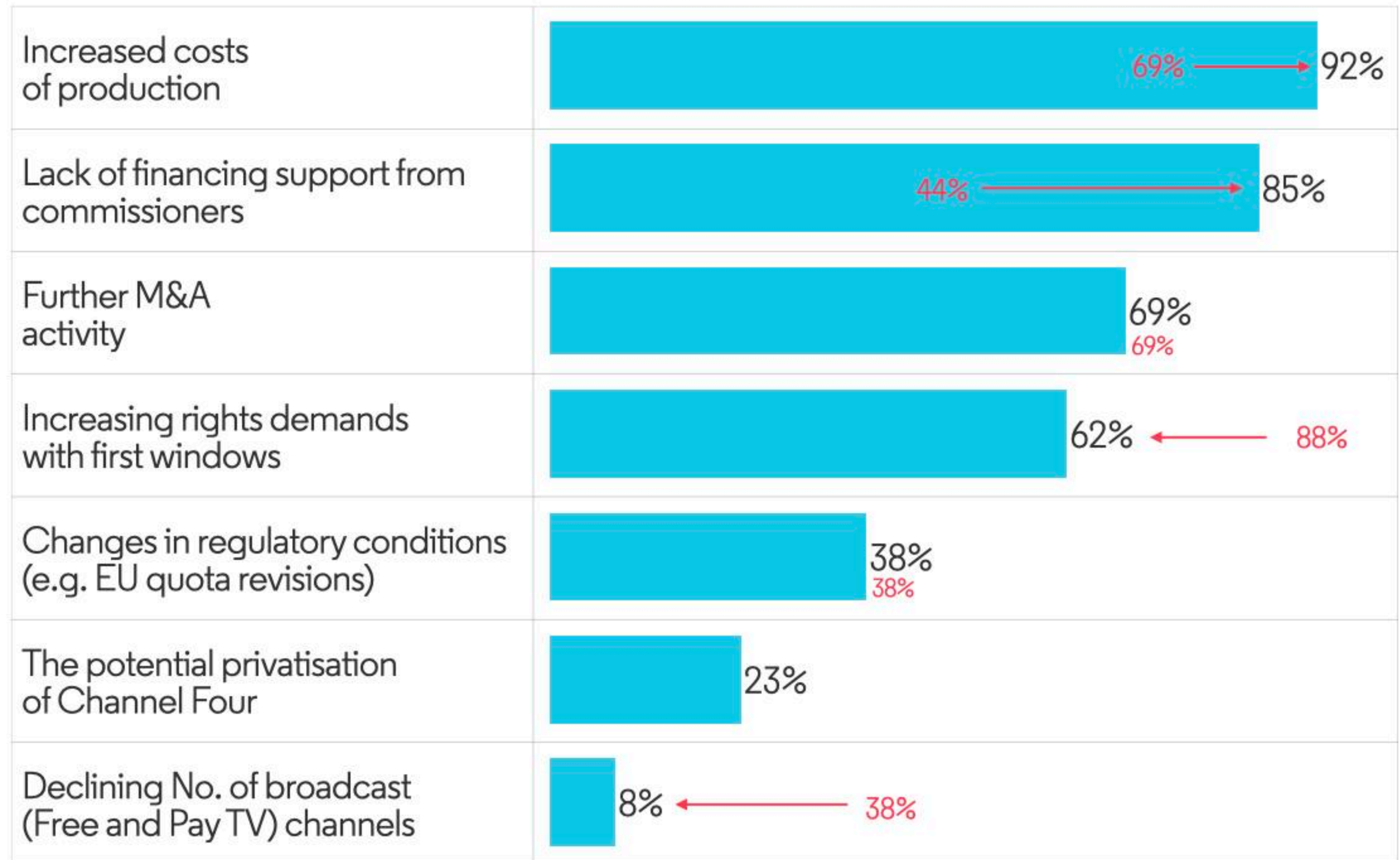
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Future Impact on Distribution



Q. “Which of the following do you think will have an impact on the distribution of UK content internationally in the next 12 months?”

This year more respondents are highlighting the challenges that come from the increased cost of production and the lack of financing support from commissioners.



UK TV Exports Report Top Exporting Titles

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Bob McCourt, Chief
Operating Office,
International,
Fremantle

“Our production expertise and vast catalogue of shows across entertainment, drama and documentaries have once again proven popular with global buyers. Providing irresistible entertainment to the world is at the core of everything we do at Fremantle. Moreover, it is great to see overall growth across the industry, after what has been a difficult few years for production.”



Top Three Exporting Titles

America's Got Talent

My Brilliant Friend

We Children From Bahnhof Zoo



UK TV Exports Report Top Exporting Titles

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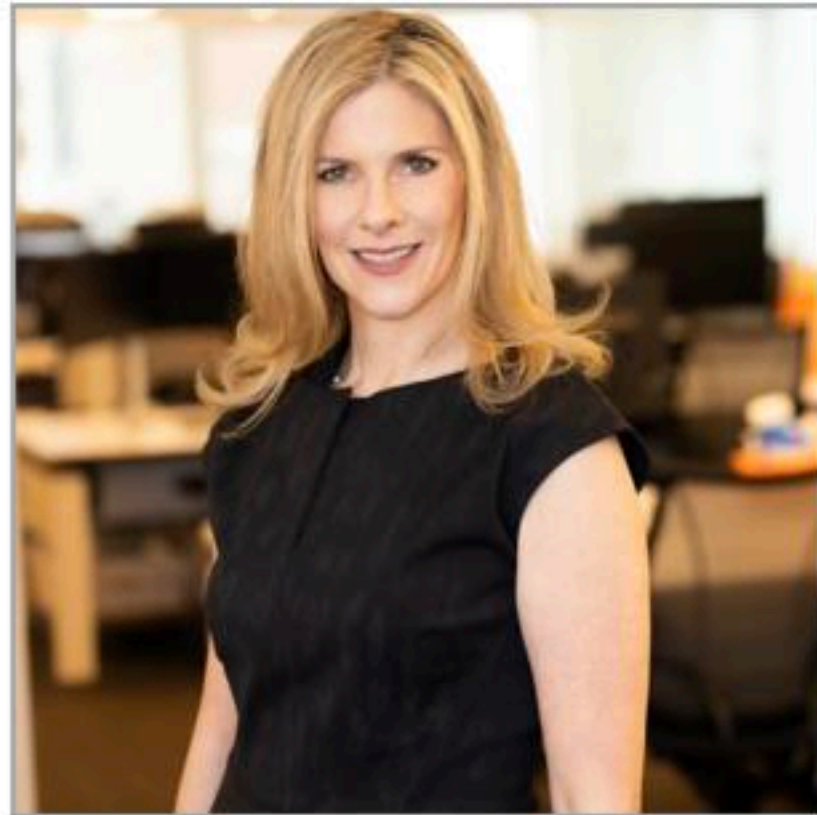
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“These figures show just how much British television is loved by audiences around the world and we are proud to work with our partners to bring them shows from Gentleman Jack to This Is Going to Hurt; Universe to Bluey.”

Rebecca Glashow,
CEO, Global
Distribution, BBC
Studios

Top Three Exporting Titles

The Mating Game

Serengeti (S2)

The Outlaws (S1)



UK TV Exports Report Top Exporting Titles

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Louise Pedersen,
CEO, All3Media
International

“These strong figures confirm the resilience and dynamism of the UK TV Exports sector. It’s encouraging to see growth in various markets and the increasing importance of AVOD and FAST revenues which we expect to continue into next year. There are challenges around increasing production costs and some restructuring at US studios and we will be watching how these changes impact the sector over the coming months.”

Top Three Exporting Titles

The Tourist

Angela Black

Trigger Point



UK TV Exports Report Top Exporting Titles

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Ruth Berry,
Managing Director,
Global Distribution,
ITV Studios

"It's brilliant to see how the UK television industry has survived one of the most challenging times in our history. It has been a spectacular bounce back, proving just how popular UK content is across the world. As this demand continues to grow, our pipeline of amazing content means we can provide our global buyers with a vast range of exciting shows, from gripping dramas such as the Emmy award-winning Vigil to global hit formats such as Love Island and factual programmes including the awe-inspiring A Year on Planet Earth."



Top Three Exporting Titles

Vigil

Love Island

The Ipcress File



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Top Exporting Titles

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Selected other Distributors

Banijay	Cake Entertainment	Cineflix
Masterchef	Mush Mush & The Mushables	Coroner
Grantchester	Total DramaRama	Mayday
Survivor	Tish Tash	Homicide: Hours to Kill

DLT	Hat Trick	HoHo
My Family	Bloodlands	Cloudbabies
As Time Goes By	Dinner Date	Shane the Chef
Go 8-Bit	George Clarke's Amazing Spaces	Chickpea

Jetpack Distribution	Passion	Sony Pictures Television
Talking Tom and Friends	Ru Pauls Drag Race	Who Wants to be a Millionaire
The Sisters	Ru Pauls Drag Race All Stars	Dragon's Den
Moley	Paradise Hotel	You Are What You Eat

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BBC Studios, a global content company with bold British creativity at its heart, is a commercial subsidiary of the BBC Group, supporting the licence fee and enhancing programmes for UK audiences. Able to take an idea seamlessly from thought to screen and beyond, its activities span content financing, development, production, sales, branded services, and ancillaries across both its own productions, and programmes and formats made by high-quality UK independents. Award-winning British programmes made by the business are internationally recognised across a broad range of genres and specialisms, with brands like Strictly Come Dancing/Dancing with the Stars, Top Gear and Doctor Who. BBC Studios has offices in over 20 markets globally, including 10 production bases in the UK and production bases or partnerships in a further 7 countries around the world. The company, which ordinarily makes around 2000 hours of content a year for both the BBC and third parties including Apple, Netflix and Migu, is a champion for British creativity around the world. It is also a committed partner for the UK's independent sector through a mix of equity partnerships, content investment and international distribution for programme titles.

Fremantle is one of the world's largest and most successful creators, producers and distributors of entertainment, drama & film and documentaries. Operating in 27 territories, Fremantle is a proudly independent group of content creators. Fremantle produces and delivers high-quality multi-genre IP, including some of the biggest entertainment formats, most watched international dramas, award-winning films and hard-hitting documentaries, amplifying local stories on a global scale. From Too Hot To Handle to The Mosquito Coast, Game of Talents to The Hand of God, Farmer Wants A Wife to Got Talent, Family Feud to My Brilliant Friend and The Investigation to Arctic Drift, Fremantle's focus is simple – to create and deliver irresistible entertainment. Fremantle is also a world leader in digital and branded entertainment, with more than 480 million fans across 1,600 social channels and over 40 billion views per year across all platforms. Fremantle is part of RTL Group, a global leader across broadcast, content and digital, itself a division of the international media giant Bertelsmann. For more information, please visit www.fremantle.com, follow us on Twitter @FremantleHQ and Instagram @fremantle or visit our LinkedIn page.

ITV Studios is home to some of the best creative minds, crafting over 7,000 hours of original programming across 60 production labels. Our global footprint spans 13 countries including the UK, US, Australia, France, Germany, Spain, The Nordics, Italy and the Netherlands and our global distribution business sells our catalogue of 90,000+ hours to broadcasters and platforms around the world.

All3 Media companies have an unrivalled track record of producing popular and critically acclaimed IP, ranging from contemporary thrillers, detective series, soap operas, comedy, costume drama, true crime, through documentary, natural history, formatted entertainment, factual entertainment, features, children's and reality programming. The production companies are based in the UK, US, Germany, the Netherlands and New Zealand and produce 3,500 hours annually for linear broadcasters, VOD, social media and other digital platforms. All3Media's distribution business, All3Media International exploits programme rights around the world from its offices in London, New York and Singapore.

Pact is the trading name for the Producers Alliance for Cinema and Television. It is the largest trade association covering the UK film, television, digital and interactive media sectors. Pact works to ensure British independent producers have opportunities for domestic and global business success. Pact offers a range of business services to its members and it actively lobbies government at local, regional, national and European levels.

3Vision is a global content and TV consultancy specialising in content acquisition, strategy, research and business development in the television industry.

With decades of TV industry experience and real-world success, we know the ins and outs of the market like nobody else. 3Vision combines intelligent trend analysis and industry partnerships to give your business expert insights, accelerate your growth and plot crystal clear routes to future success.

For further information please contact:

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