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UK Television Exports

FY 2014/2015



The annual UK Television Exports Survey highlights the popularity of UK programming abroad by collecting revenue figures relating to the international activity of UK television companies. Pact commissioned TRP Research to conduct the FY 2014/2015 survey.

Key Findings

- The estimated total revenue from the international sale of UK TV programmes and associated activities was £1,207m, a -1% decrease from £1,214m in 2013/14.
- Revenue from Mexico represented the greatest percentage increase from last year, rising +46% to £1.6m; a change from China in the prior two years.
- Exports to South Africa and Rest of Sub Saharan Africa also registered sizeable percentage increases at +37% and +31% respectively. Sales to Brazil rose +30%.
- In line with previous years, the USA remained the UK's largest export market despite sales dropping -5% to £407m.
- Sales to Rest of Western Europe represented the greatest actual increase at 11m.
- With sales of £145m, Australasia was the UK's second biggest export market showing a +7% increase year-on-year.
- Exports of finished television programming remained the UK's largest source of TV revenue (£689m) despite decreasing slightly (-4%)
- Digital Rights showed the greatest percentage increase; up +47% from last year whilst sales of formats rose +5%.
- North America represented 39% of total export revenue in 2014/15, with Europe contributing 31% and Rest of World contributing 30%. In line with previous years,

sales of finished programming in North America made up a smaller proportion of total revenue than both Europe and Rest of World.

- North America is the UK's strongest export market for co-productions, the production of new commissions, sales of digital rights, DVDs and licensing/miscellaneous whilst Rest of World is the biggest market for sales of formats.
- Drama was a key driver of British export success with respondents reporting that this genre, although relatively small in size, sold to the greatest number of territories.
- Factual and Factual Entertainment were an important and sizeable genre with content reaching niche audiences across multiple territories.
- This year's survey highlighted the importance of digital rights; respondents indicated that well over half of this revenue came from SVOD services on platforms such as Amazon, Netflix and Hulu.
- Survey respondents were confident that export opportunities would increase next year citing territorial opportunities in the USA and Asia and drama and formats as key genres. Sales to digital platforms were also considered of key importance.
- Alongside established markets in the USA and Europe, survey respondents believe that Asia, Pacific Rim territories, Latin America and China, represent the greatest opportunity for growth with exports to Indonesia rising +19% this year and to Rest of South East Asia up +21%.

Notes: 24 responses were received this year. In order for comparisons between years to be meaningful, the figures for 2013/14 have been revised to compare like for like company responses. There was some estimation for incomplete or late surveys.

Table 1: Sales by territory, FY 2013/2014 and FY 2014/2015 (£million)

TERRITORY	FY 2013/2014	FY 2014/2015	+ / -
USA	429	407	-5%
CANADA	75	64	-15%
FRANCE	60	69	+15%
GERMANY	50	46	-7%
SPAIN	16	16	-1%
ITALY	35	37	+3%
SCANDINAVIA	74	69	-7%
NETHERLANDS	17	14	-18%
BELGIUM	10	12	+20%
REST OF WESTERN EUROPE	52	63	+22%
POLAND	11	10	-8%
REST OF CENTRAL & E. EUROPE	35	35	-1%
RUSSIA	11	5.6	-49%
JAPAN	10	11	+11%
INDONESIA	1.3	1.6	+19%
SOUTH KOREA	5.6	5.9	+6%
REST OF SOUTH EAST ASIA	14	17	+21%
INDIA	12	11	-11%
CHINA	16	16	+1%
REST OF ASIA	30	30	+1%
AUSTRALASIA	135	145	+7%
BRAZIL	3.0	3.9	+30%
MEXICO	1.1	1.6	+46%
REST OF LATIN AMERICA	29	30	+5%
TURKEY	5.3	5.2	-2%
ISRAEL	3.5	4.3	+24%
REST OF MIDDLE EAST	19	16	-20%
SOUTH AFRICA	8.1	11	+37%
REST OF SUB-SAHARAN AFRICA	3.4	4.5	+31%
REST OF WORLD	40	45	+11%
TOTAL	1,214	1,207	-1%

Table 2: Sales by type FY 2013/2014 and FY 2014/2015 (£million)

TYPE	FY 2013/2014	FY 2014/2015	+ / -
TELEVISION	722	689	-4%
DVD	84	81	-4%
DIGITAL RIGHTS	95	140	+47%
CO-PRODUCTION	36	37	+3%
FORMAT	54	57	+5%
LICENSING/ MISCELLANEOUS	73	61	-16%
PRODUCTION (NEW COMMISSIONS)	150	142	-6%
TOTAL	1,214	1,207	-1%

Table 3: Sales by type and territory FY 2014/2015 (£million)

TYPE	North America	Europe	Rest of World	Total
TELEVISION	148	272	270	689
DVD	48	15	18	81
DIGITAL RIGHTS	81	32	26	140
CO-PRODUCTION	35	1.6	0.0	37
FORMAT	8.3	23	25	57
LICENSING/ MISCELLANEOUS	30	11	20	61
PRODUCTION (NEW COMMISSIONS)	121	19.8	1.1	142
TOTAL	471	376	360	1,207

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