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UK Television Exports

FY 2013/2014



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 Television Research Partnership to conduct the FY 2013/2014 survey.

Key Findings

- The estimated total revenue from the international sale of UK TV programmes and associated activities was £1,284m, a 5% increase from £1,223m in 2012.
- For a second year, revenue from China represented the greatest percentage increase from last year, rising +40% to £17m.
- In line with previous years, the USA remained the UK's largest export market with sales up +10% to £523m. Exports to the USA contributed the greatest actual increase.
- Despite a fall in revenue (-10%), Australasia remained the UK's second biggest export market with sales totalling £95m in 2013/14.
- Exports of finished television programming increased slightly (+4%) and remained the UK's largest source of TV revenue (£644m).
- Digital Rights showed the greatest percentage increase; up +72% from last year whilst sales of formats rose +17%.
- North America represented 47% of total export revenue in 2013/14, with Europe contributing 27% and Rest of World contributing 26%. 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, sales of digital rights, DVDs, licensing/miscellaneous and the production of new commissions, whilst Europe is the biggest market for sales of formats.
- British creativity was widely believed to be central to the success of UK television exports. British production values and owning IP that could be globally exploited were also important factors.
- The production of content in English was also considered by survey respondents to be a significant advantage.
- Over half of survey respondents said short running series were the biggest barrier to the growth of international exports. Overly domestic content was also cited as an obstacle to programme sales.
- This year's survey revealed factual programming, entertainment and drama to be key drivers of UK television exports. There was also an increased interest in deals with digital media platforms such as Netflix and Amazon.
- Survey respondents believe Asia and in particular China, which grew +40% this year represent the greatest opportunity for growth. However more established markets in Europe, such as Netherlands (+28%), France (+21%), and Poland (+21%) have provided major sources of revenue.
- The proliferation of new digital platforms in the US and elsewhere has provided an important new outlet for British content.

Notes: 31 responses were received this year. In a change from previous years, this year's survey covers the FY (13/14). In order for comparisons between years to be meaningful, the figures for 2012 have been revised to compare like for like company responses. There was some estimation for incomplete or late surveys.

Table 1: Sales by territory, 2012 and FY 2013/2014 (£million)

TERRITORY	2012	FY 2013/2014	+ / -
USA	475	523	+10%
CANADA	79	75	-5%
FRANCE	31	37	+21%
GERMANY	29	31	+7%
SPAIN	19	16	-17%
ITALY	31	35	+13%
SCANDINAVIA	63	68	+8%
NETHERLANDS	13	16	+28%
BELGIUM	10	10	-3%
REST OF WESTERN EUROPE	84	81	-4%
POLAND	8.7	11	+21%
REST OF CENTRAL & E. EUROPE	34	35	+4%
RUSSIA	10	11	+5%
JAPAN	11	9.5	-10%
INDONESIA	1.2	1.4	+15%
SOUTH KOREA	7.3	7.1	-3%
REST OF SOUTH EAST ASIA	22	18	-16%
INDIA	6.1	5.6	-8%
CHINA	12	17	+40%
REST OF ASIA	52	57	+8%
AUSTRALASIA	105	95	-10%
BRAZIL	2.6	2.3	-11%
MEXICO	0.7	0.9	+23%
REST OF LATIN AMERICA	32	30	-7%
TURKEY	5.0	5.7	+14%
ISRAEL	4.4	3.7	-15%
REST OF MIDDLE EAST	18	20	+11%
SOUTH AFRICA	10	9.5	-5%
REST OF SUB-SAHARAN AFRICA	46	3.4	+10%
REST OF WORLD		48	
TOTAL	1,223	1,284	+5%

Table 2: Sales by type 2012 and FY 2013/2014 (£million)

TYPE	2012	FY 2013/2014	+ / -
TELEVISION	619	644	+4%
DVD	153	143	-7%
DIGITAL RIGHTS	29	49	+72%
CO-PRODUCTION	35	37	+7%
FORMAT	41	48	+17%
LICENSING/ MISCELLANEOUS	196	190	-3%
PRODUCTION (NEW COMMISSIONS)	151	173	+15%
TOTAL	1,223	1,284	+5%

Table 3: Sales by type and territory FY 2013/2014 (£million)

TYPE	North America	Europe	Rest of World	Total
TELEVISION	156	260	228	644
DVD	98	20	24	143
DIGITAL RIGHTS	24	16	10	49
CO-PRODUCTION	34	2.3	0.7	37
FORMAT	6.4	26	15	48
LICENSING/ MISCELLANEOUS	107	27	56	190
PRODUCTION (NEW COMMISSIONS)	173	-	-	173
TOTAL	598	351	334	1,284

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