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STUDIOS
GLOBAL ENTERTAINMENT

BBC
Worldwide



UK Television Exports

TRP
RESEARCH

2015/16

FOREWORD



Mark Garnier,
Parliamentary Under Secretary of State
Department for International Trade (DIT)

I am delighted to launch the latest edition of the UK TV Exports Report for 2015/16.

From *The Night Manager* to *Downton Abbey*, UK TV exports continue to go from strength to strength. The UK is a world leader in the sales of TV content globally and revenues continue to rise. Latest international revenue figures show current sales at more than £1.3 billion, a 10% increase from £1.2 billion in 2014/15.

UK programmes are some of the most recognisable and eagerly anticipated in the world. British innovation and creativity, allied with high production values and the ownership of Intellectual Property that can be exploited globally, are considered among the greatest assets of the UK television sector. The Department for International Trade works in partnership with industry to ensure that independent British programme-makers are given the support they need to reach the widest possible international audience.

Europe, USA, Canada and Australasia have long been important markets for UK content. However, the report shows that there is important future growth potential in markets such as China, India, Japan, and other parts of Asia supported, in part, by funding from the Department for International Trade.

From small creative digital and animation companies to major production houses, the UK leads the world in television production and I look forward to continuing to work with you to grow UK exports.

A handwritten signature in black ink that reads "Jack Lumsden".

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.

Key Findings

- The estimated total revenue from the international sale of UK TV programmes and associated activities was £1,326m, a +10% increase from £1,205m in 2014/15. In 2014/2015 UK television exports had declined -0.6%.
- In line with previous years the UK's largest export market was the USA: in 2015/16 sales increased +16% to £497m which also represented the greatest absolute increase (£69m).
- Revenue from Japan represented the greatest percentage increase from last year, rising +48% to £15m.
- India, China and South Korea, also registered sizeable percentage increases at +43%, +40% and +39% respectively.
- Sales to Australia stood at £106m making it the UK's second biggest export market. Exports to France grew +5% to £73m in 2015/16, making it Britain's biggest non-English speaking market and its third biggest overall.
- For the first year the survey collected data on pan-territory deals. Collectively these provided revenue of £26m equating to 2% of the total exports.
- Exports of finished television programming remained in line with 2015/14 at £668m and were the UK's largest source of TV revenue.
- Sales of Digital Rights increased +79% to £248m making it the second largest source of TV revenue. It represented almost a fifth (19%) of the total revenue.
- This year's survey highlighted the increasing importance of digital rights particularly on SVOD platforms such as Netflix and Amazon. Respondents believe that there is further opportunity for growth from this area.
- North America represented 41% of total export revenue in 2015/16, with Europe contributing 31% and Rest of World contributing 29%. As in previous years, sales of finished programming in North America made up a smaller proportion of total revenue than both Europe and Rest of World.
- Unchanged from last year, North America was the UK's strongest export market for co-productions, the production of new commissions, sales of digital rights, DVDs and licensing/miscellaneous. Europe is the biggest market for sales of formats.
- Both scripted and non-scripted programme sales were important with respondents reporting global sales for a number of titles. Investment in premium content for both genres was believed to be central to future export growth.
- Respondents remained confident that TV export revenues would increase next year from further sales in both established markets such as the USA and France and newer markets in territories such as Asia, Latin America and Russia.
- Economic and political uncertainty, particularly in Europe was seen as one of the obstacles to further growth next year.

Notes: 29 responses were received this year. In order for comparisons between years to be meaningful, the figures for 2014/15 have been revised to compare like for like company responses. There was some estimation for incomplete or late surveys. For the purposes of this survey Russia is considered part of Europe.



Table 1: Sales by territory, FY 2014/2015 and FY 2015/2016 (£million)

TERRITORY	FY2014/2015	FY 2015/2016	+ / -
Usa	428	497	+16%
Canada	65	47	-29%
France	70	73	+5%
Germany	45	51	+11%
Spain	16	21	+33%
Italy	36	46	+28%
Nordics	68	70	+3%
Netherlands	13	11	-19%
Belgium	11	11	+2%
Rest of Western Europe	61	62	+2%
Poland	10	11	+12%
Rest of Central & E. Europe	32	36	+11%
Russia	6	4.7	-15%
Japan	10	15	+48%
Indonesia	1.4	0.8	-43%
South Korea	5.8	8.1	+39%
Singapore	17.3	1.2	-39%
Rest of South-East & East Asia		9.4	
India	10	15	+43%
China	16	23	+40%
Rest of Asia	29	37	+28%
Australia	141	106	-7%
New Zealand		24	
Rest of Australasia/Oceania		1.6	
Brazil	3.6	3.4	-5%
Mexico	1.4	1.3	-7%
Rest of Latin America	29	34	+14%
Turkey	5.1	5.7	+10%
Israel	4.2	4.4	+5%
Rest of Middle East	15	18	+18%
South Africa	11.2	13	+18%
Rest of Sub-Saharan Africa	3.8	1.0	-74%
North Africa	39.3	1.2	+1%
Rest of World		39	
Pan Territory Deal: North America	-	0.01	-
Pan Territory Deal: Europe	-	9.0	-
Pan Territory Deal: Asia	-	3.0	-
Pan Territory Deal: Australasia	-	3.1	-
Pan Territory Deal: South America	-	2.6	-
Pan Territory Deal: Africa	-	0.6	-
Pan Territory Deal: Worldwide	-	7.3	-
Total	1,205	1,326	+10%



Table 2: Sales by type FY 2014/2015 and FY 2015/2016 (£million)

TYPE	FY2014/2015	FY 2015/2016	+ / -
Television	668	668	+0.1%
DVD	79	69	-13%
Digital Rights	139	248	+79%
Co-Production	39	39	-1%
Format	56	46	-17%
Licensing / Miscellaneous	59	56	-5%
Production (New Commissions)	165	198	+20%
Total	1,205	1,326	+10%

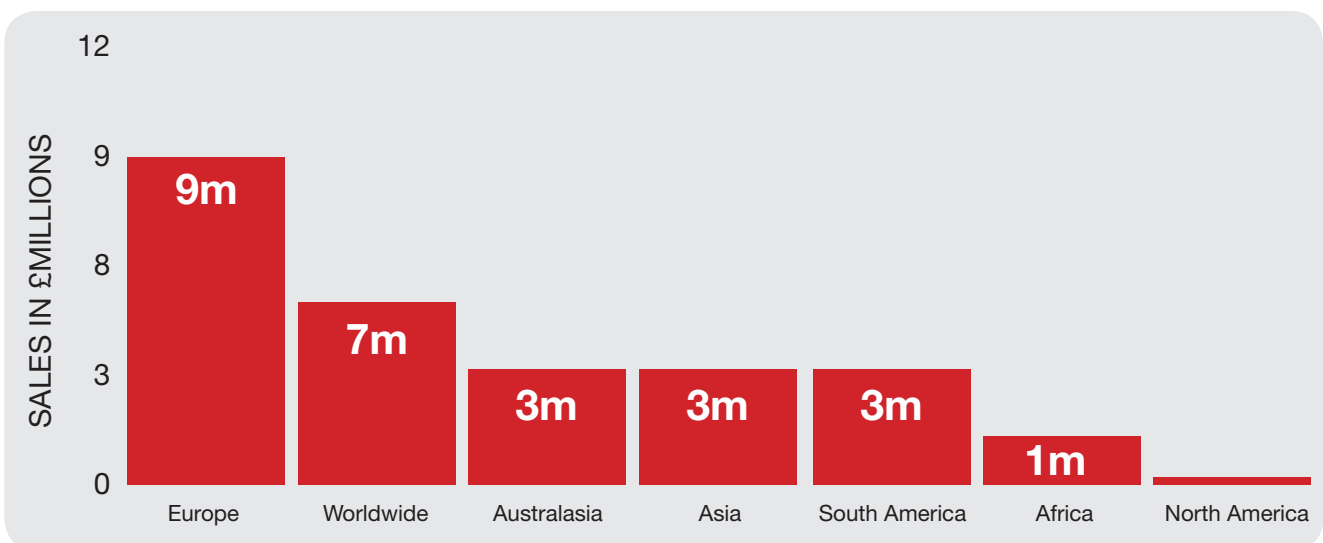
Table 3: Sales by type and territory FY 2015/2016 (£million)

TYPE	NORTH AMERICA	EUROPE	REST OF WORLD	TOTAL
Television	136	271	261	668
DVD	41	13	15	69
Digital Rights	133	61	55	248
Co-Production	38	0.7	0	39
Format	8.5	23	15	46
Licensing / Miscellaneous	27	7	22	56
Production (New Commissions)	160	29	9.2	198
Total	543	405	378	1,326

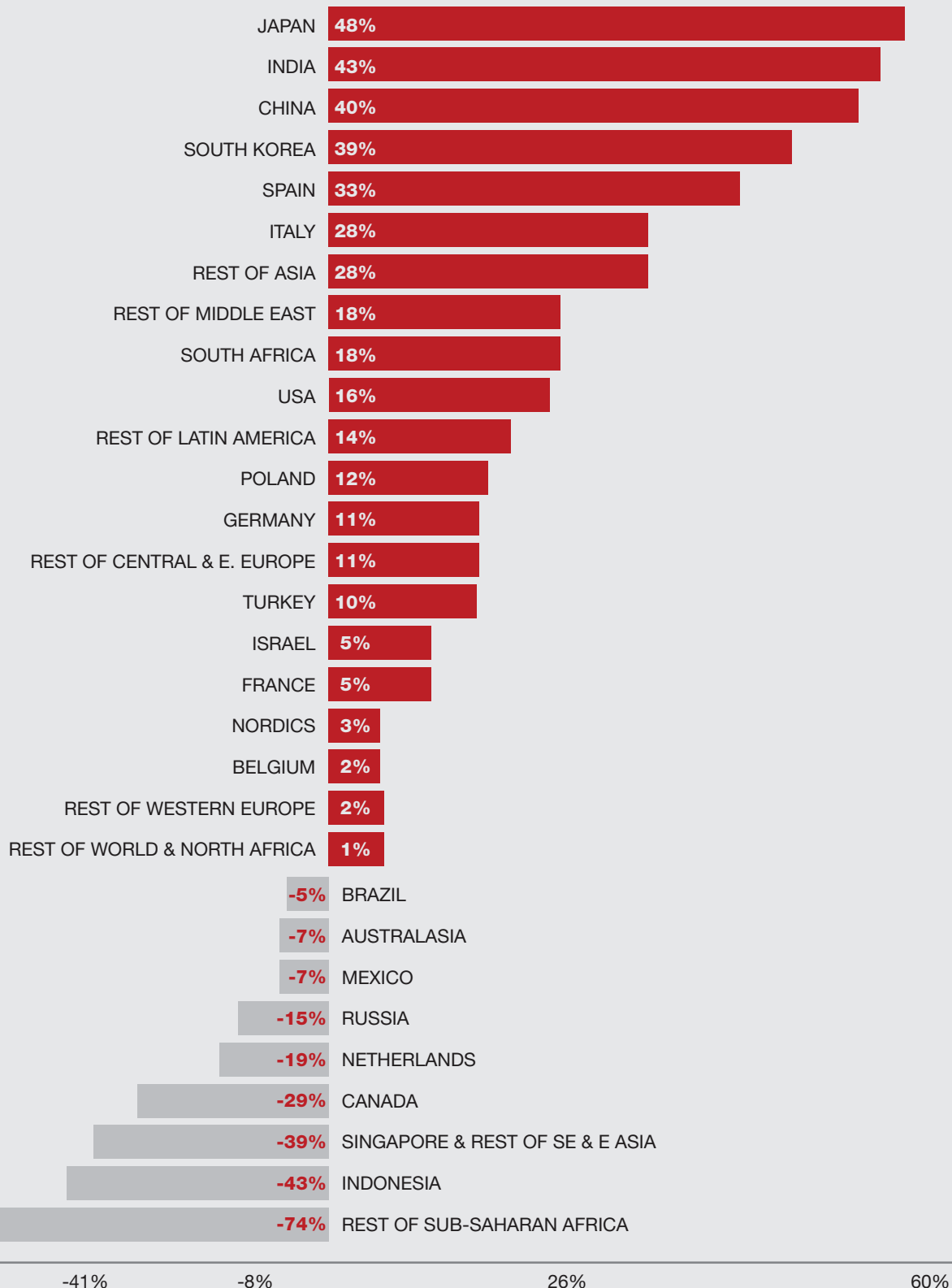
PAN TERRITORY DEALS



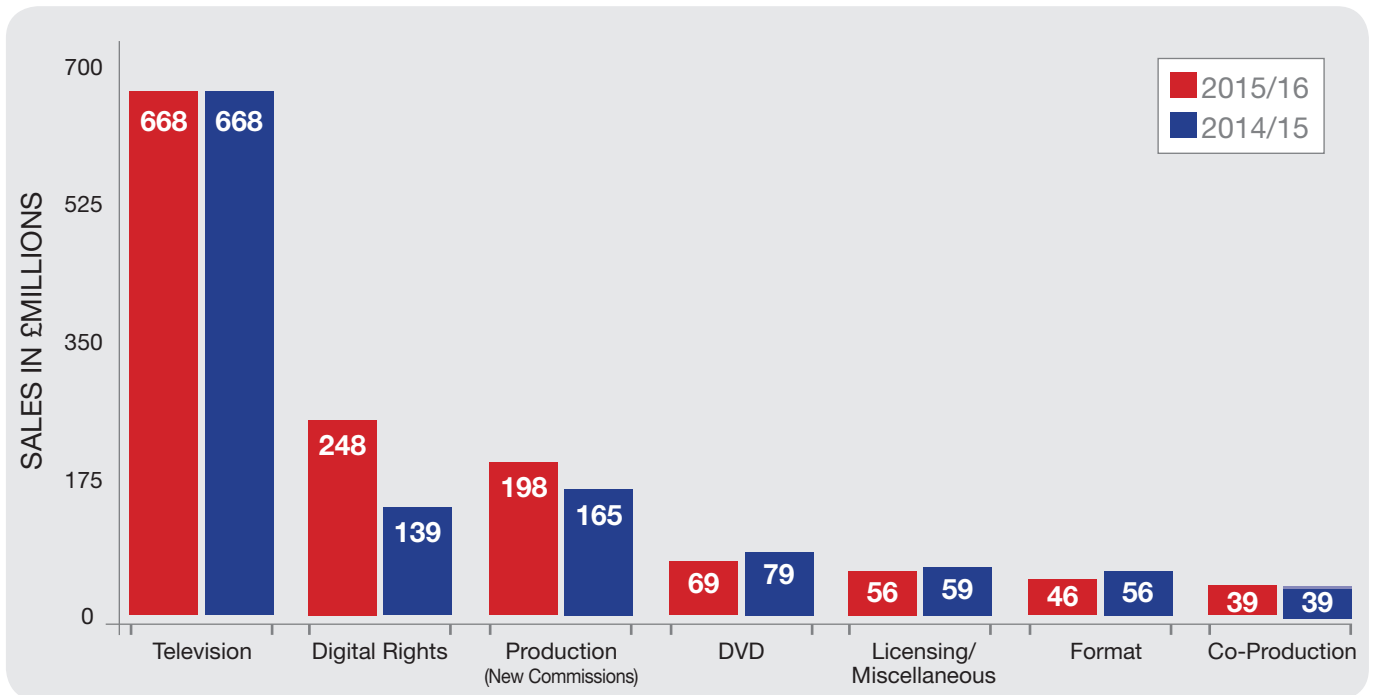
**SALES BY
TERRITORY £
15/16**



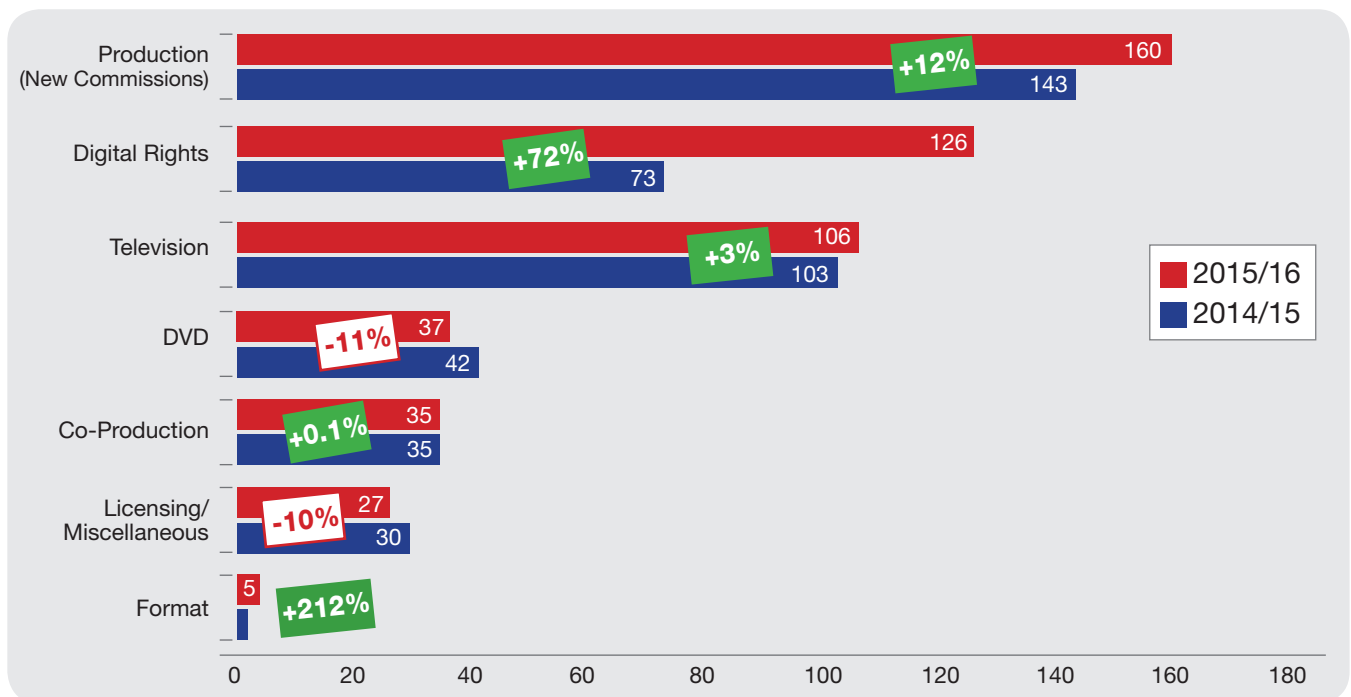
Asian territories were the top 4 largest % increase



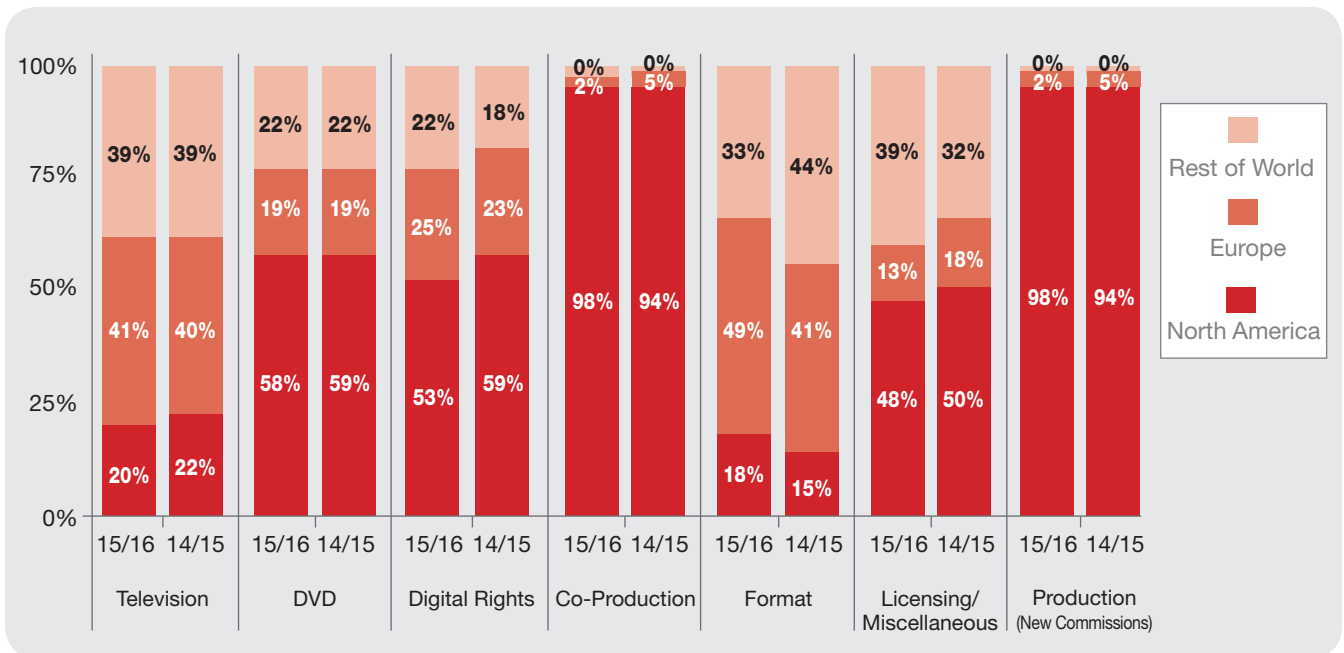
Sales of Digital Rights increased +79%



Sales of Digital Rights in the USA increased +72%



Sales of Digital Rights to N. America made up a smaller proportion y-o-y



Top Exporting Shows - Scripted



Number territories sold to



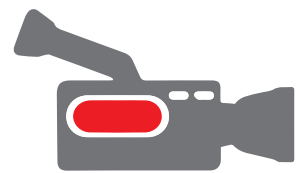
Top Exporting Shows - Scripted



Number territories sold to



Top Exporting Shows - Non-Scripted



Number territories sold to





PACT

- Pact is the trading name for the Producers Alliance for Cinema and Television.
- Pact is 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.

BBC WORLDWIDE

- BBC Worldwide is the main commercial arm and a wholly owned subsidiary of the British Broadcasting Corporation (BBC). Its vision is to build the BBC's brands, audiences, commercial returns and reputation across the world. This is achieved through investing in, commercialising and showcasing content from the BBC around the world, in a way that is consistent with BBC standards and values. The business also champions British creativity globally.

ITV STUDIOS GLOBAL ENTERTAINMENT

- ITV Studios Global Entertainment (ITVS GE) is one of the world's leading international TV distribution, home entertainment, publishing, merchandising and licensing businesses. ITVS GE distributes celebrated content across all genres from both its in-house production business, ITV Studios, and in collaboration with leading producers from around the world. Part of ITV PLC, which includes the UK's largest commercial broadcaster, ITV Studios Global Entertainment has offices in London, Hong Kong, Los Angeles and Sydney.



Pact represents the commercial interests of the UK's independent television, film, animation and digital producers.

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