
UK TV Exports Report

2019-20

November 2020

3VISION

pact.

**BBC
STUDIOS**

**itv
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UK TV Exports Report

Foreword

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The UK is a global cultural powerhouse, with the growing international appetite for our brilliant British TV exports bearing testament to a superb success story.

This year's Pact TV Exports Report shows it's been yet another record-breaking year for British TV in the international marketplace, with exports increasing 6% to £1.48b, despite the global economic downturn.

From Monty Python to Midsomer Murders, Masterchef to Mr Bean, audiences worldwide have long been hungry for British excellence, with the UK's world-class writers, makers and innovators pushing the creative boundaries of this dynamic and highly competitive industry.

In a year of unprecedented global challenges, TV has come into its own as a medium that offers comfort and escape for millions worldwide. The spectacular success of dramas such as Chernobyl and His Dark Materials have helped to cement the UK's reputation as world-class production line for the most exciting, creative and innovative screen storytelling.

Drama remains the driving force behind our growing international sales in this field - accounting for 48% of all export revenue. British factual programmes are also making waves on the global stage, with hits such as Bake Off helping the genre to account for over a quarter of all exports from the sector over the past 12 months.

The United States was once again our biggest TV export market by far last year, generating £466m in revenues – up by more than £20m. The free trade deal we are seeking to agree with the US would provide a fantastic boost for our vibrant and dynamic audio visual sector – opening the door to an even greater exchange of televisual excellence and expertise between our nations – and benefiting the industry and audiences alike on both sides of the Atlantic.

And the good news for the British TV industry doesn't stop there.

Our TV exports to Latin America and Asia – two key growth markets – were up 13% and 15% respectively last year, whilst revenue from Europe and Canada also remained buoyant. Meanwhile, the appetite for British TV in Australia and New Zealand demonstrates the enduring appeal of British-made productions in the English-speaking world - with these two countries of

particular importance for the newer, smaller British TV businesses that are starting out as global exporters.

With many global TV conferences and missions cancelled or moved online in the wake of COVID-19, the Department for International Trade has strived in partnership with Pact to provide key networking opportunities for British TV producers. A recent example of this work was the 'Content Without Borders: LatAm' conference which offered UK TV producers a fantastic opportunity to learn about the Latin American market and hear from key broadcasters and buyers from across the region.

Furthermore, the free trade agreement we recently signed with Japan – our first as a newly independent trading nation - goes further than the EU-Japan agreement on provisions that tackle online infringement of intellectual property, which is vital to our TV and film companies.

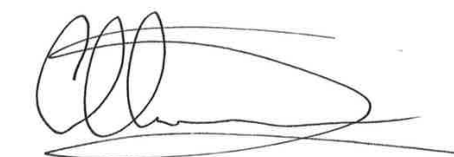
Throughout this global crisis the UK's incredible TV industry has demonstrated the creativity, innovation and resilience that sets it apart - adapting to the great challenges it has faced while continuing to provide the very highest quality television content for audiences across the planet to enjoy.

The enduring strength of UK TV exports is a credit to the excellence of this extraordinary industry and I am confident that the sector will continue to go from strength to strength in the years ahead as the world recovers, resets and returns to growth.

Graham Stuart MP

Minister for Exports

Department for International Trade



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Key Findings

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£1,475 million

2019/20 UK TV international exports

£1,027 million

Finished programme sales

32% exports

USA market

70% exports

Finished programming

22% Library

Finished programme sales

Another record-breaking year for UK television exports, increasing 6% year-on-year to a new high of **£1.48 billion**.

The **USA continues to be the most important market** for UK exports **contributing 32% (£466m) of all revenue** in the 2019/20 financial year. **France (£102m)** and **Australia (£98m)** complete the top 3 markets.

TV sales remain the largest source of income (70% of the total) and this year **surpassed £1 billion for the first time**.

Library sales (content aged 4+ years) comprised 22% of revenues this year. With production largely halted past March 2020 we may see an increased contribution from library sales in the next financial year, with feedback from UK distributors highlighting increased demand already.

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Top Twenty Export Markets



The USA (£466m) continues to be the biggest export market with an increase in revenues of £22m year-on-year. Revenue from France has decreased by £13m but remains the second biggest market for UK content. Australia (+£2m) and Canada (+£18m) have both increased on the previous financial year.

A number of European countries feature in the top ten and are joined by China, South Africa and New Zealand. China was identified last year as a market with growth potential and revenues there have increased by 25% to £40m.

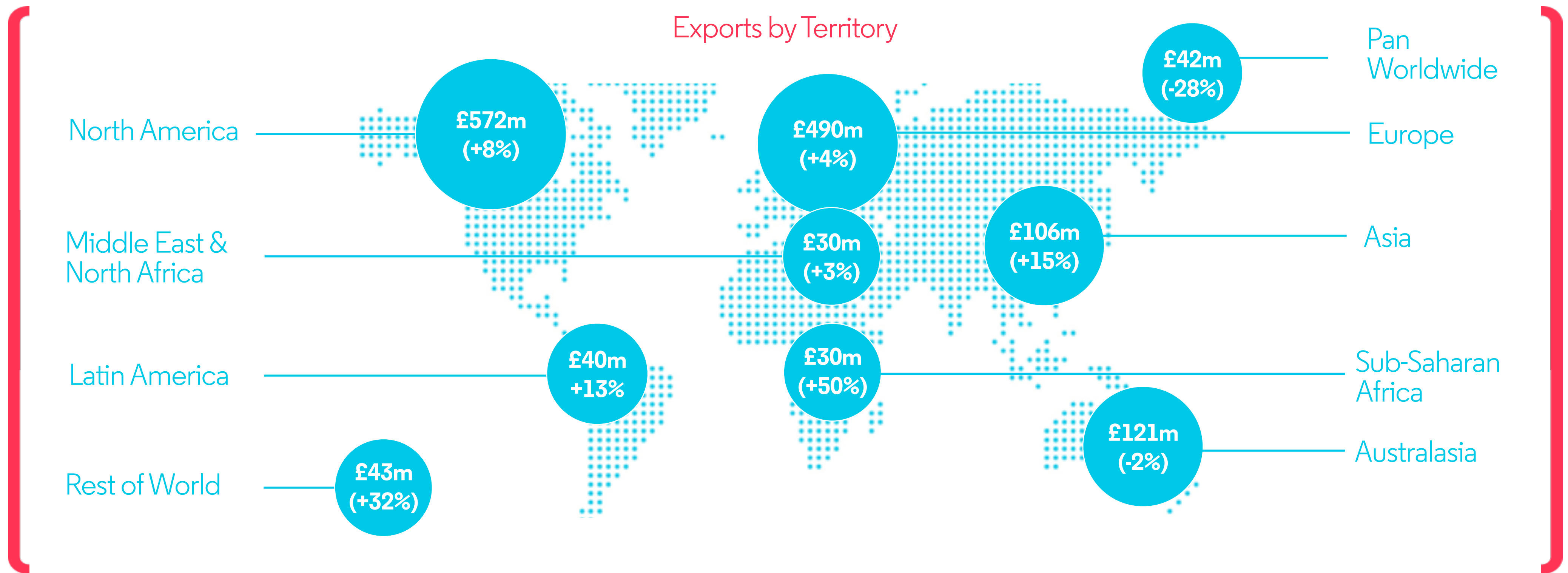
Looking ahead to 2020/21, China and Latin America are again predicted to offer opportunities as well as expected continued growth in the USA.

TOP 20 COUNTRIES	£M
USA	466
FRANCE	102
AUSTRALIA	98
CANADA	80
NORDICS	77
GERMANY	75
CHINA	40
ITALY	40
SOUTH AFRICA	29
NEW ZEALAND	20
NETHERLANDS	19
INDIA	19
SPAIN	18
RUSSIA	17
BELGIUM	15
POLAND	11
JAPAN	9
TURKEY	7
BRAZIL	6
SOUTH KOREA	6

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Exports by Territory: Macro Regions

North America continues to be the most profitable market for UK exports with an 8% (+£41m) year-on-year increase in revenue. Europe remains the second largest export market (£490m) with France, Germany and the Nordics key territories.



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TV Sales by Service Type

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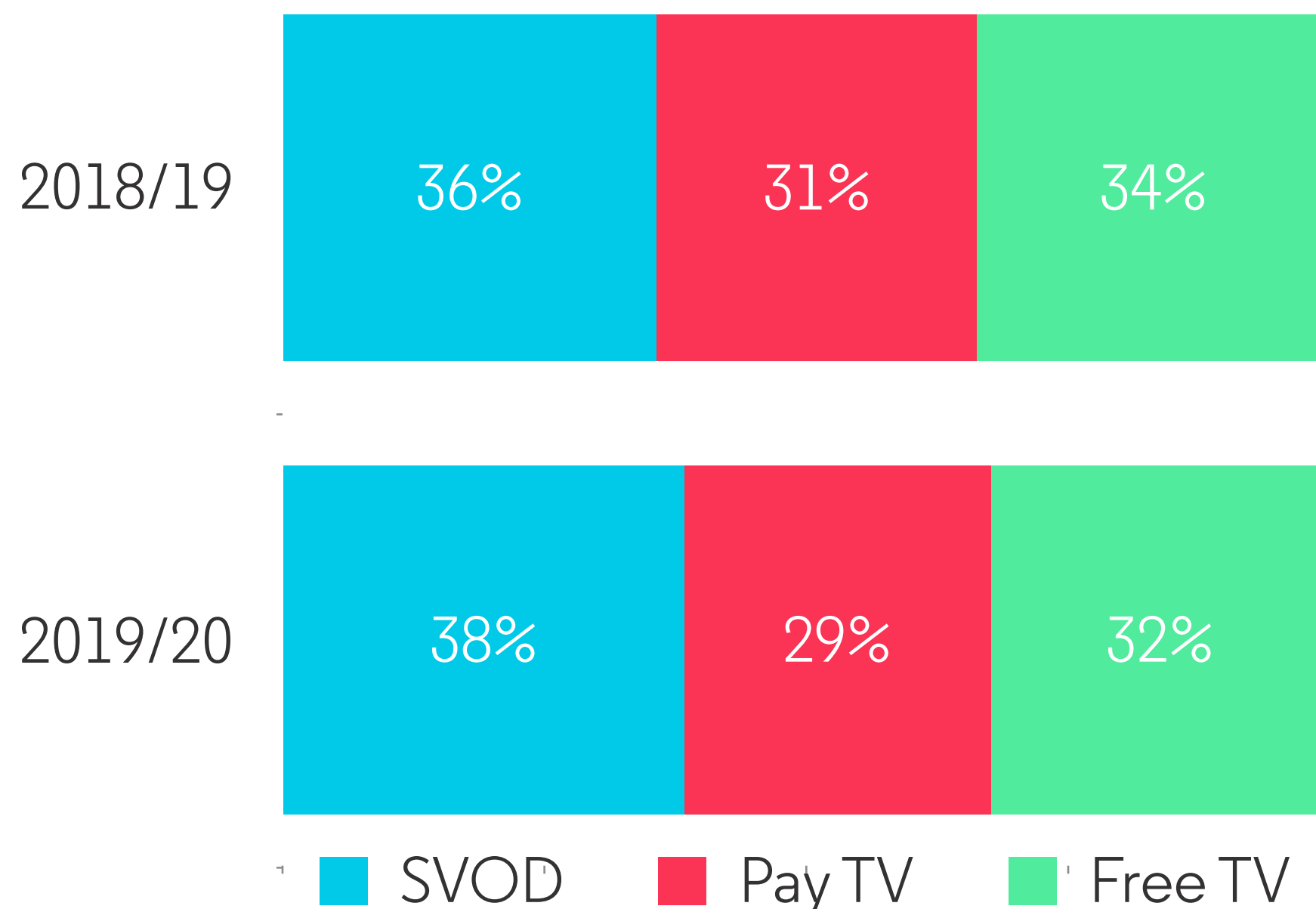
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Sales of finished programming to SVOD services has increased year-on-year. D2C services continue to launch and expand into new territories, fighting for market position. The capture of UK programming is an important part in establishing a strong content proposition for consumers.

TV Sales by Service Type



STARZPLAY

Aggressive international expansion of the Lionsgate owned service, acquiring shows such as 'Baptiste', 'Les Miserables' and 'The Dublin Murders' for multiple markets

FILMIN

Local Spanish SVOD service acquiring a number of UK titles including 'Brassic', 'Back to Life' and 'Summer of Rockets'

globoplay

Significant buyer in Brazil, acquiring UK premium drama such as 'Cheat', 'MotherFatherSon' and 'Dark MonEy'

Note: First window SVOD acquisition analysis, 3Vision Show Tracker

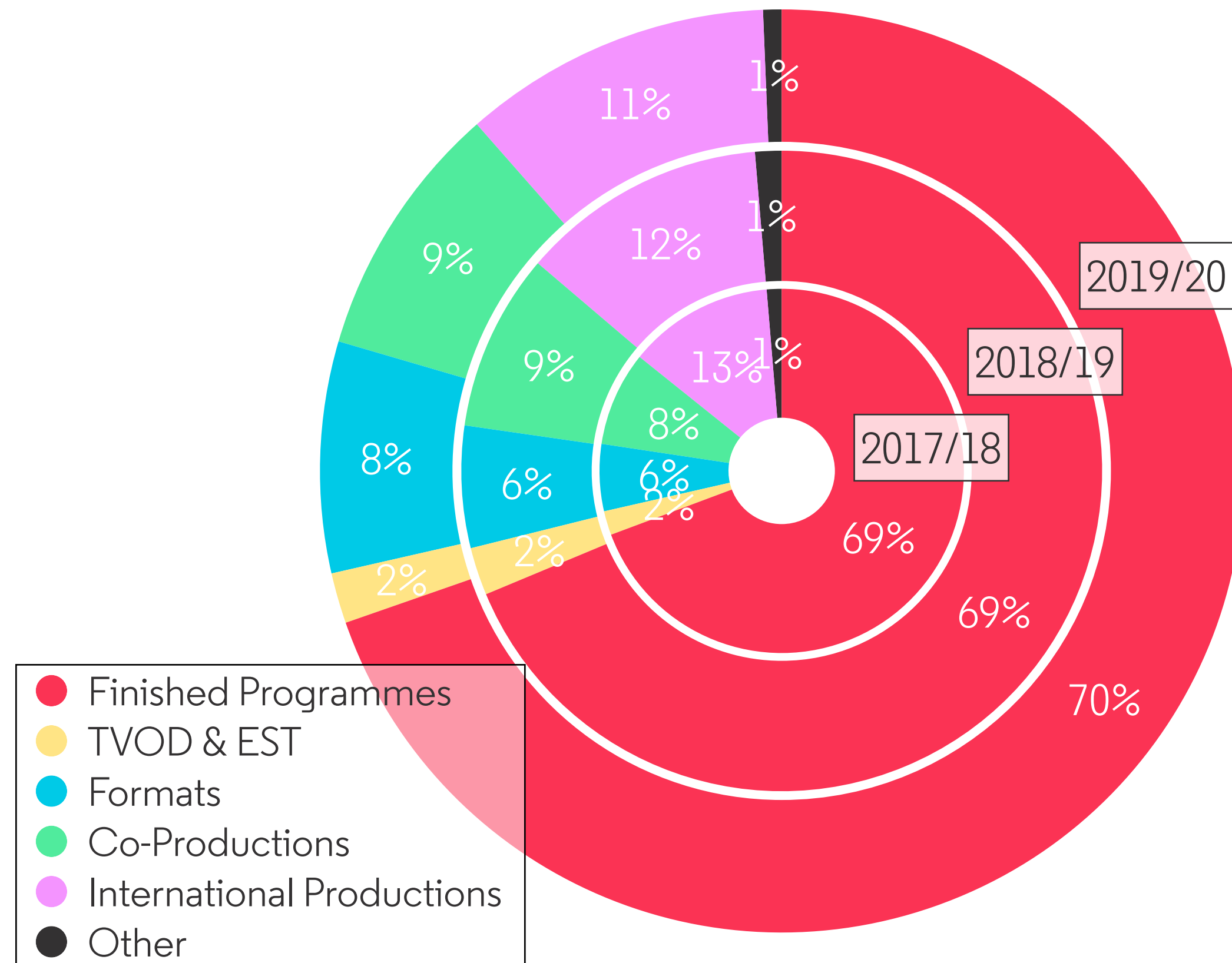
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Sales by Type

The sale of finished programmes remains the largest contributor to UK export revenue and has increased its overall contribution slightly to 70%.

Total revenue from the sale of Formats (£119m) and Co-Productions (133m) continue to rise each year.

UK Television Exports by Sales Type



UK TV Exports Report Premium Drama



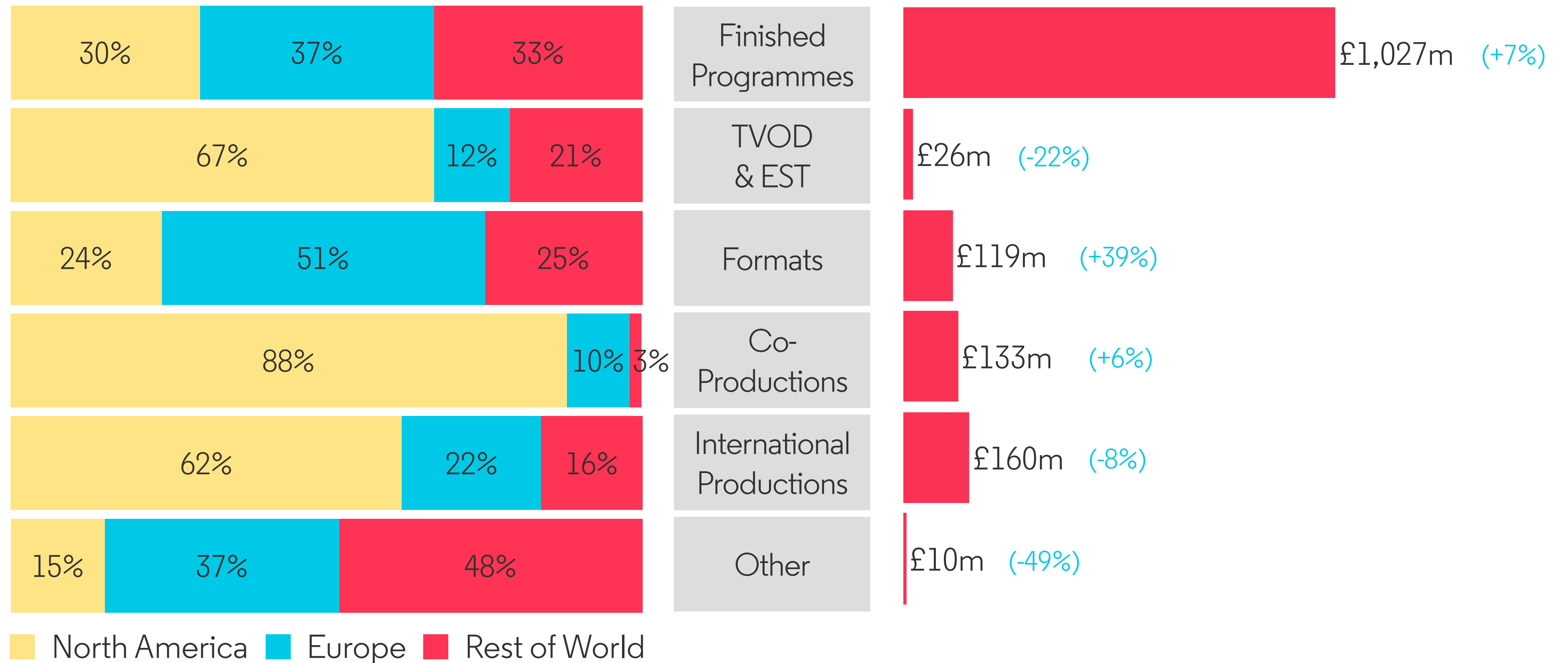
Premium drama distributed by or co-produced in the UK entertains audiences in all corners of the world and is acquired by a diverse mix of Free, Pay TV and SVOD services. UK and HBO co-productions such as ‘Chernobyl’ and ‘His Dark Materials’ have premiered on HBO’s branded services and third party services in markets where they have no presence.

	Aus	Bra	Can	Chi	Fra	Ger	Ind	Ita	Mex	Pol	Spa	Swe	US
Chernobyl (Sky Studios co-production)	foxtel NOW	HBO	crave		OCS City	sky atlantic	Disney+ hotstar	sky atlantic	HBO	HBO	HBO	HBO	HBO
The Feed (All3Media distribution)	SBS ON DEMAND	prime video	prime video	bilibili	STARZ PLAY	STARZ PLAY		STARZ PLAY	prime video		STARZ PLAY		prime video
His Dark Materials (BBC Studios co-production)	FOX SHOW CASE	HBO	HBO		OCS City	sky atlantic	Disney+ hotstar	sky atlantic	HBO	HBO	HBO	HBO	HBO
Dracula (BBC Studios co-production)	NETFLIX	NETFLIX	NETFLIX		NETFLIX	NETFLIX	NETFLIX	NETFLIX	NETFLIX	NETFLIX	NETFLIX	NETFLIX	NETFLIX
War of the Worlds (ITV Studios distribution)	FOX ONE	film&arts	T+E		TF1		SONY LIV	la	EUROPA europa	EPIC DRAMA	#0		amc PREMIERE

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Sales by Type

Sales by Type - FY 2019/20



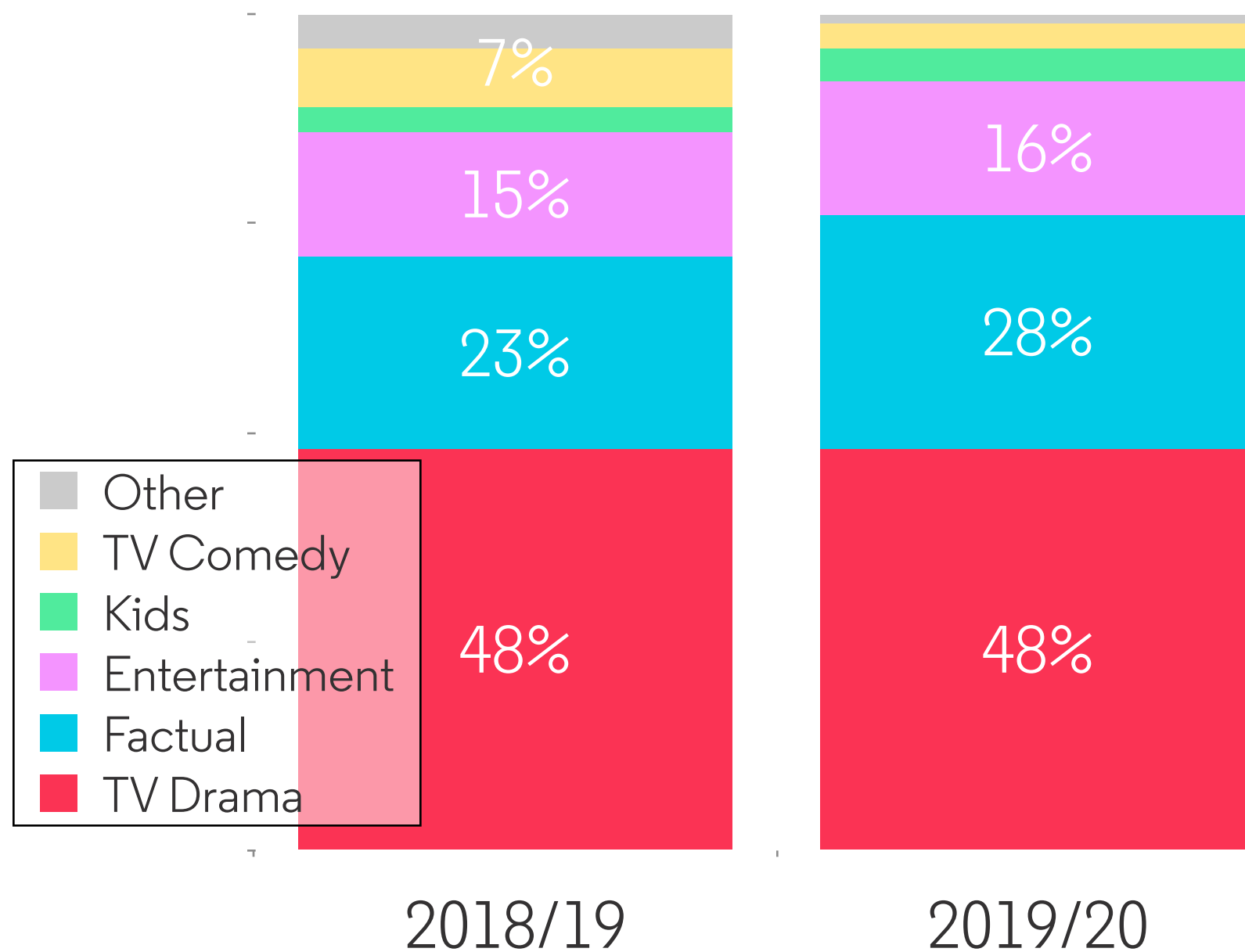
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Sales by Genre



Scripted drama remains the key driver of international exports for UK companies, and is the source of 48% of all revenue. Library content (aged 4+ years) accounts for a smaller share of revenue this year (22%) than last (38%). As production has stalled throughout much of 2020 due to the global pandemic, feedback from the industry suggests an increase in demand for library content emerging and new market opportunities with it.

Sales by Genre





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



BBC Studios, a global content company with bold British creativity at its heart, is a commercial subsidiary of the BBC Group. 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, Doctor Who and Bluey. BBC Studios has offices in 22 markets globally, including ten production bases in the UK and production bases or partnerships in a further nine countries around the world. The company, which ordinarily makes around 2500 hours of content a year for both the BBC and third parties including Apple, Amazon and China Mobile, 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. To the BBC, BBC Studios contributes both cash dividends and funds for programme-making, supporting the licence fee and enhancing programmes for UK audiences.



ITV Studios is a creator, producer and distributor of world-leading programmes that people can't get enough of. We connect millions of people every day and shape and reflect the world they live in, we are More Than TV.

ITV Studios is home to some of the best creative minds, crafting over 8,400 hours of original programming across 55 production labels. Our global footprint spans 13 countries including the UK, US, Australia, France, Germany, The Nordics, Italy and the Netherlands and our global distribution business sells our catalogue of 46,000+ hours to broadcasters and platforms around the world.

ITV Studios is part of ITV PLC, which includes the UK's largest commercial broadcaster.



3Vision help clients build highly successful content businesses through a range of expert consultancy services. We combine intelligent trend analysis and deep industry experience to give your business expert insight. Our strategic advice is drawn from first-hand experience and real world success.

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