3VISION

UK TV Exports Report

2024-25

November 2025

pact.
BBC STUDIOS
ITV STUDIOS
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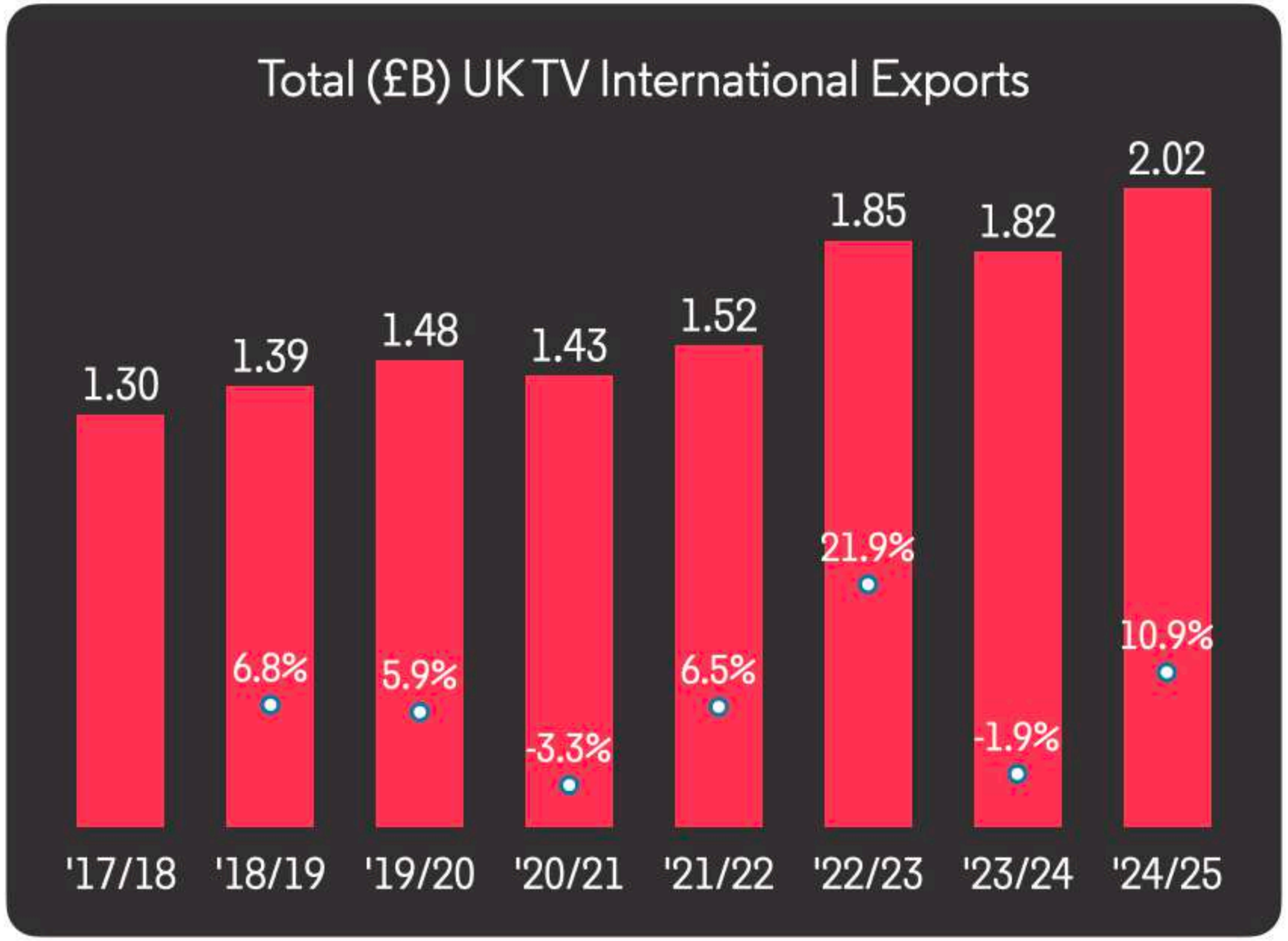
UK TV Exports Report
Key Findings



After some difficult years in global markets and some ongoing challenges to the TV business it is reassuring to see UK TV Exports return to growth. Exports have shown a confident return to growth, exceeding the previous high in 2022/23 and breaking the £2 billion barrier for the first time.

Conditions remain challenging for all and it is clear that businesses are having to work harder for revenues, perhaps illustrated by the increased proportion of TV Sales (44%) that are library, the general decline in deals with streamers and the shift in category shares.

In line with the total revenue numbers many markets have individually bounced back after falling in 2023/24, with only two global markets showing consecutive years of decline.

Categories of revenue are evolving and whilst TV Sales is growing it continues to lose share. With the exception of the smallest category - Digital Sales (TVOD & EST) - all lines of revenue have returned to growth.

UK TV Exports Report
Top Twenty Export Markets

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The behaviour of US media companies has created significant challenges over the last three years for UK companies but despite this the US remains the largest destination for UK TV Exports, accounting for 40% of the total, up 34% year-on-year.

Many of the countries that showed decline last year have returned to growth, most notably with Italy (64% up versus 23% decline in '23/24) and France (61% up versus 21% decline).

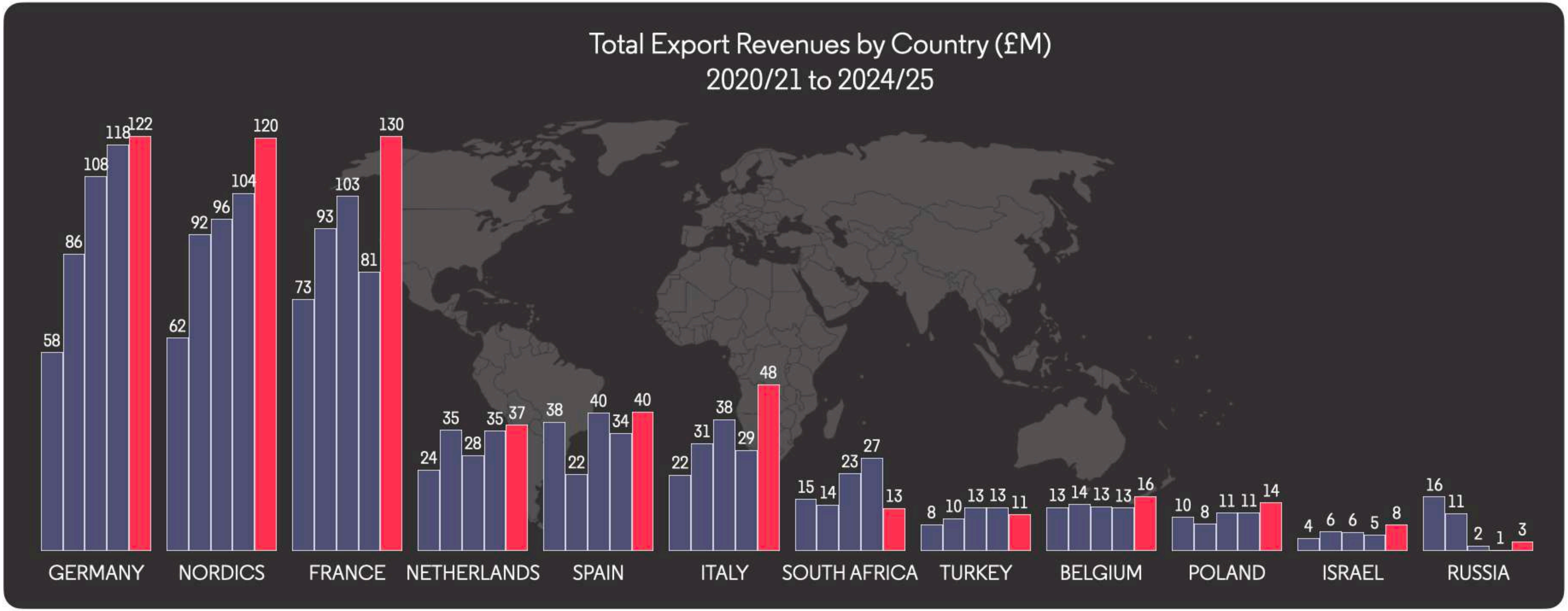
Elsewhere in Europe, Poland (26%), Belgium (27%), and Spain (18%) all achieved double-digit growth, with no European countries in the top 20 showing declines.

Outside Europe Mexico, South Africa, and China saw the steepest declines in exports, falling 56%, 53%, and 44% respectively. Only China (-25% in '23/24, -44% in '24/25) and Japan (-25% in '23/24, -3% in '24/25) have shown consecutive years of decline.

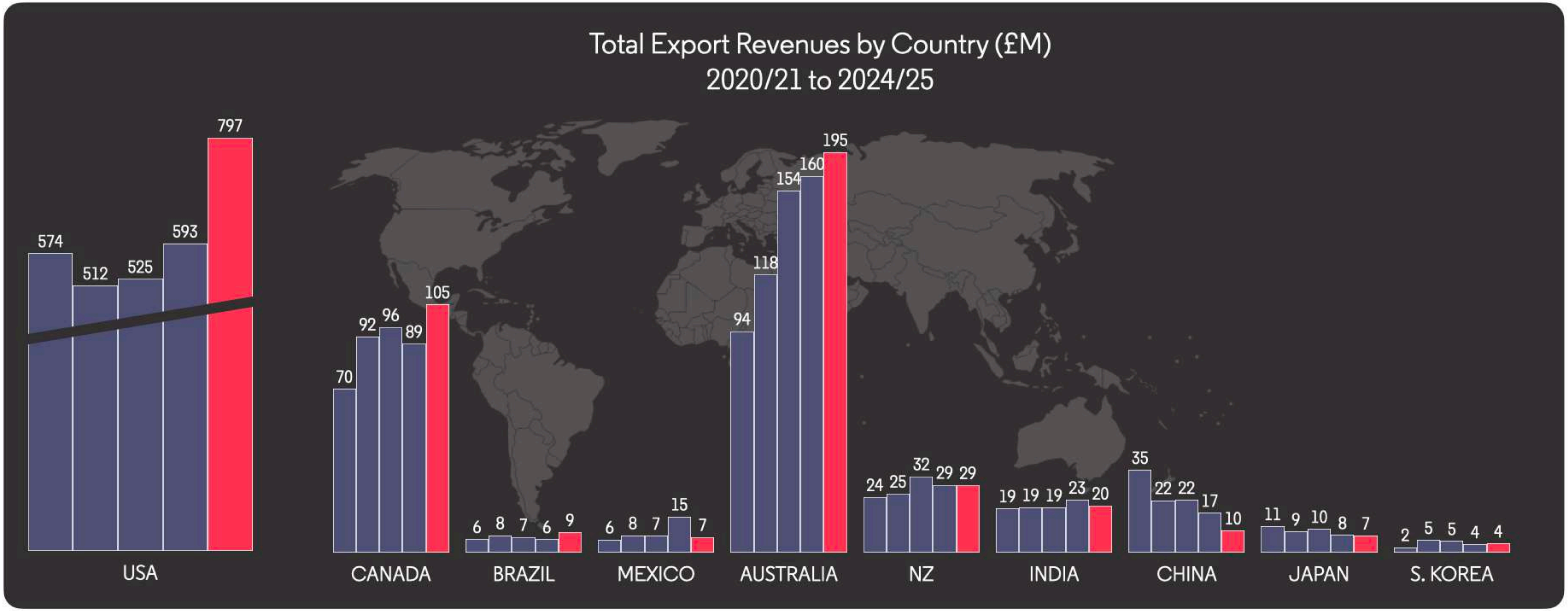
Top Twenty Export Markets

Rank		Country	'24/25 Revenues (£M)	YOY%	'23/24 YOY%	Rank
1	-	USA	797	34%	13%	1
2	-	AUSTRALIA	195	22%	4%	2
3	▲	FRANCE	130	61%	-21%	6
4	▼	GERMANY	122	4%	8%	3
5	▼	NORDICS	120	15%	8%	4
6	▼	CANADA	105	19%	-7%	5
7	▲	ITALY	48	64%	-23%	9
8	-	SPAIN	40	18%	-15%	8
9	▼	NETHERLANDS	37	5%	25%	7
10	-	NEW ZEALAND	29	0%	-11%	10
11	▲	INDIA	20	-11%	17%	12
12	▲	BELGIUM	16	27%	-3%	16
13	▲	POLAND	14	26%	0%	17
14	▼	SOUTH AFRICA	13	-53%	20%	11
15	-	TURKEY	11	-16%	1%	15
16	▼	CHINA	10	-44%	-25%	13
17	▲	BRAZIL	9	49%	-13%	19
18	▲	ISRAEL	8	58%	-15%	20
19	▼	JAPAN	7	-3%	-25%	18
20	▲	MEXICO	7	-56%	113%	14

UK TV Exports Report
Export Markets - EMEA



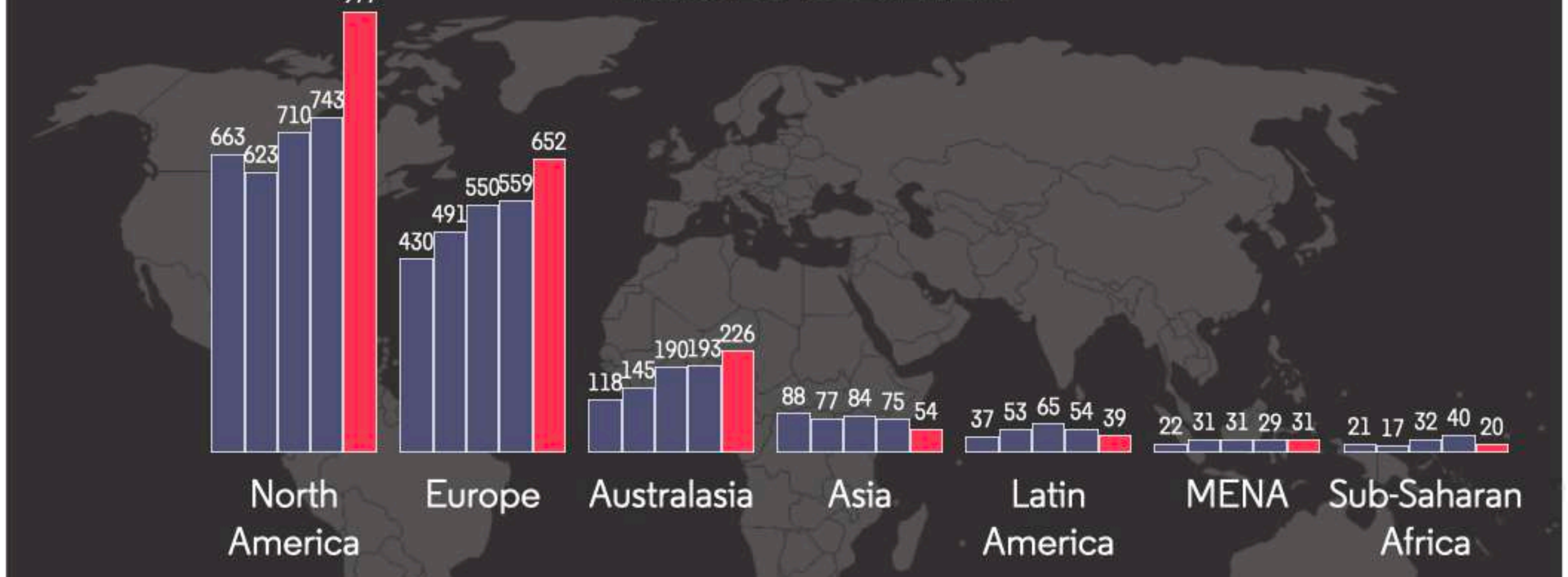
UK TV Exports Report
Export Markets - Rest of the World



Note different scale for US Market.

UK TV Exports Report
Exports by Territory: Macro Regions

Total Export Revenues by Region (£M)
2020/21 to 2024/25



	North America	Europe	Australasia	Asia	Latin America	MENA	Sub-Saharan Africa
Revenue Growth (YOY)	31.5%	16.7%	16.8%	-28.5%	-27.9%	7.8%	-49.7%
Respondents Ranking #01	58% (80%)	42% (11%)	n/a		n/a	n/a	n/a
Weighted Ranking	1.64 (1.70)	1.73 (2.60)	3.64 (2.90)		4.09 (3.40)	4.55 (4.00)	5.91 (4.90)
Ranking Position	#01 (#01)	#02 (#02)	#03 (#03)		#04 (#04)	#05 (#05)	#06 (#06)

North America recorded the highest year-on-year growth of 32%, reaching an all-time high of £977 million.

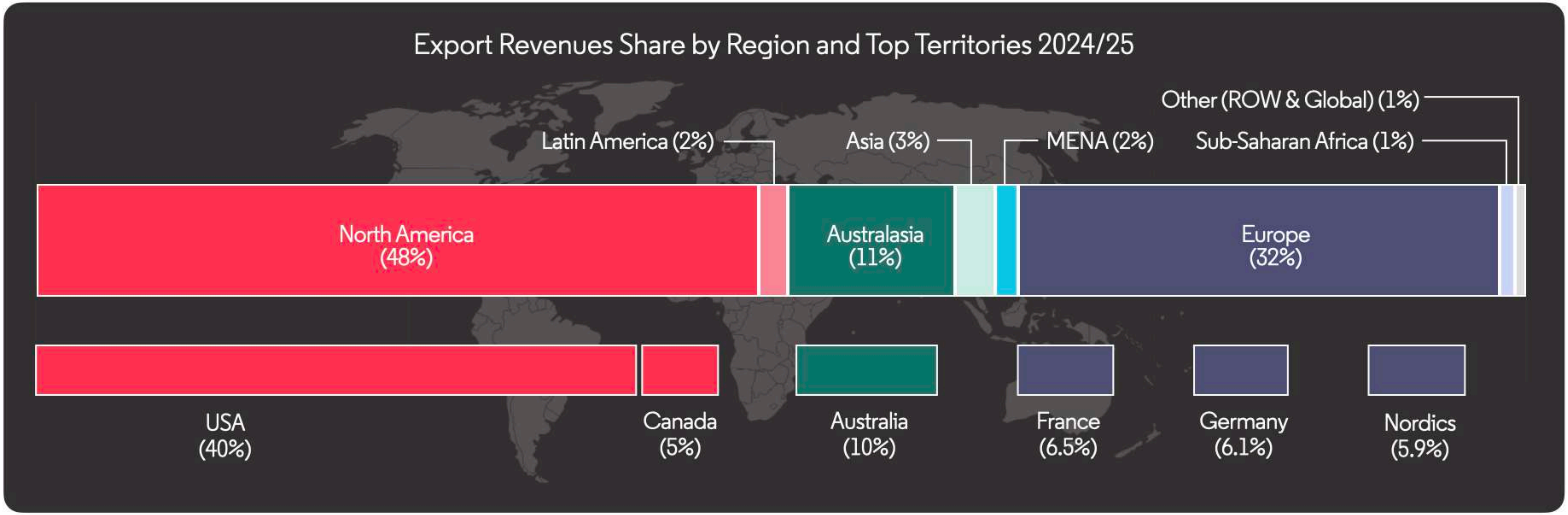
Europe (18%) and Australia (17%) both showed strong growth whilst Latin America and Asia continued their downward trend, falling 28% and 29% respectively. Sub-Saharan Africa showed a significant fall this year, with revenues down 50%.

Looking at the responses to our question on where people felt the best prospects were in the coming year we had no change to the overall basic ranking.

The strength of feeling towards North America and Europe has grown year-on-year with both weighted rankings and the number of respondents who selected them as their number one region and priorities remaining the same.

Note: Value in brackets represents last year's figure. Respondents were asked Q.In the coming financial year (2025/26) where is the focus of your growth? Please rank 1-7 (1 being the highest)

UK TV Exports Report
Exports by Territory: Macro Regions



The top six markets (counting Nordics collectively) represents 74% of all revenues.

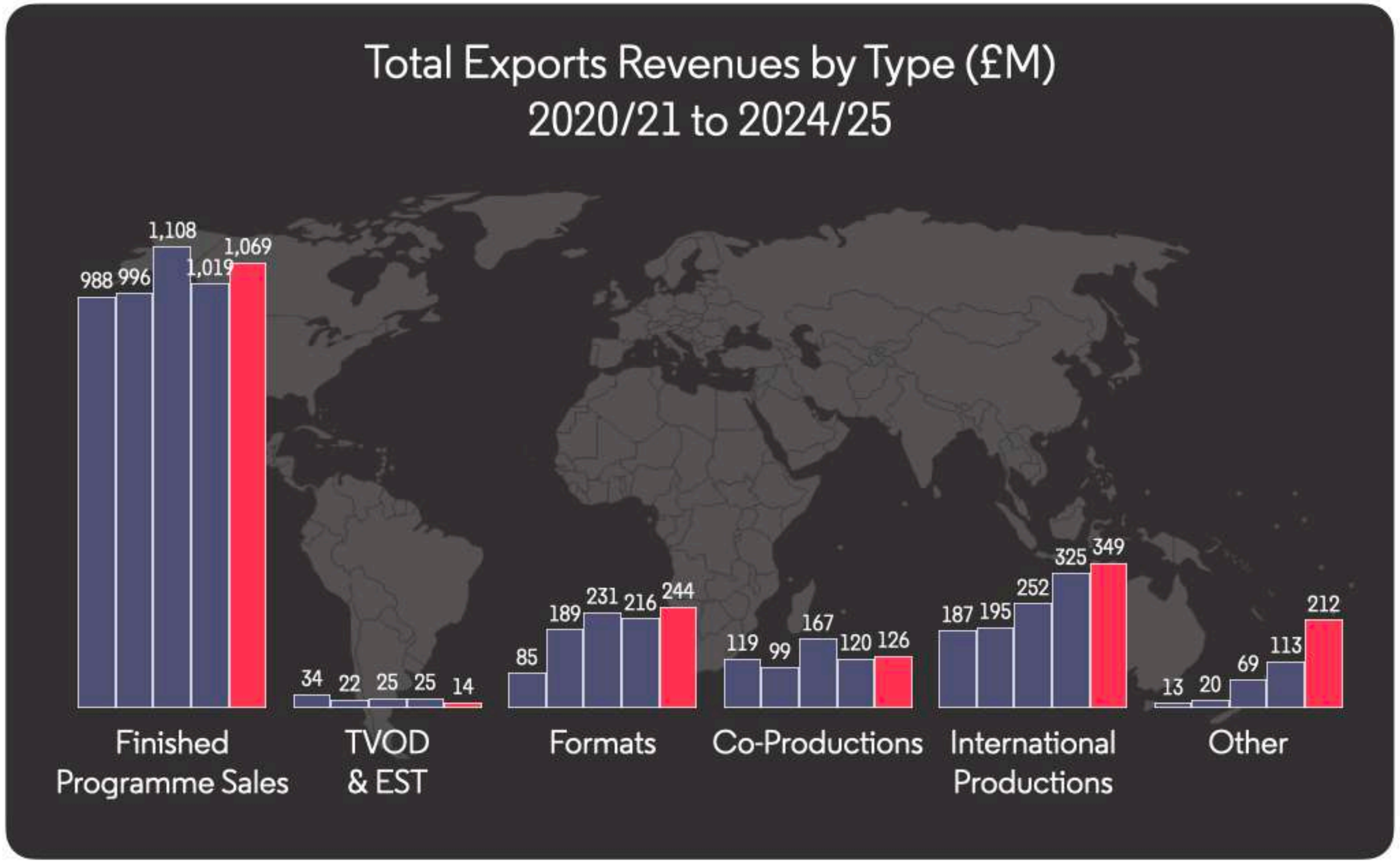
UK TV Exports Report
Exports by Type

Only the smallest category of sales showed decline, with Digital Sales (TVOD & EST) falling 43% to a low of £14 million.

Finished programme sales remains the largest contributor to overall exports (53%), with sales rebounding 5% to £1,069 million after last year's decline, although this figure us still below 2022/23 levels.

International Production continued its upward trend, rising 8% to £349 million whilst Formats and Co-Productions grew 13% and 5% year-on-year, reaching £244 million and £126 million respectively.

There was also another significant increase in the 'Other' category of revenue (revenues from licensing ancillary, non-programme rights e.g. consumer products), increasing to £212 million.



Exports by Type

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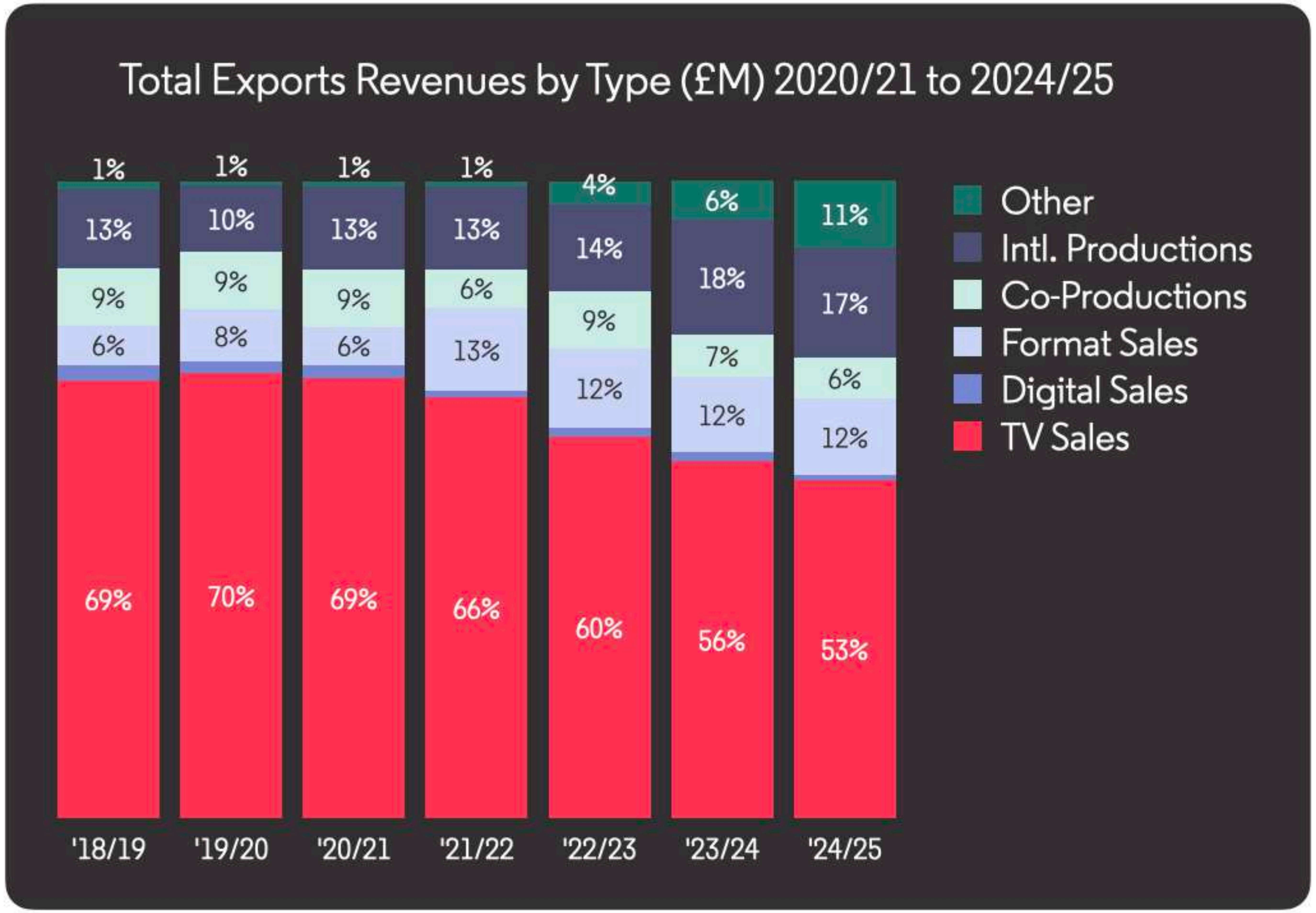
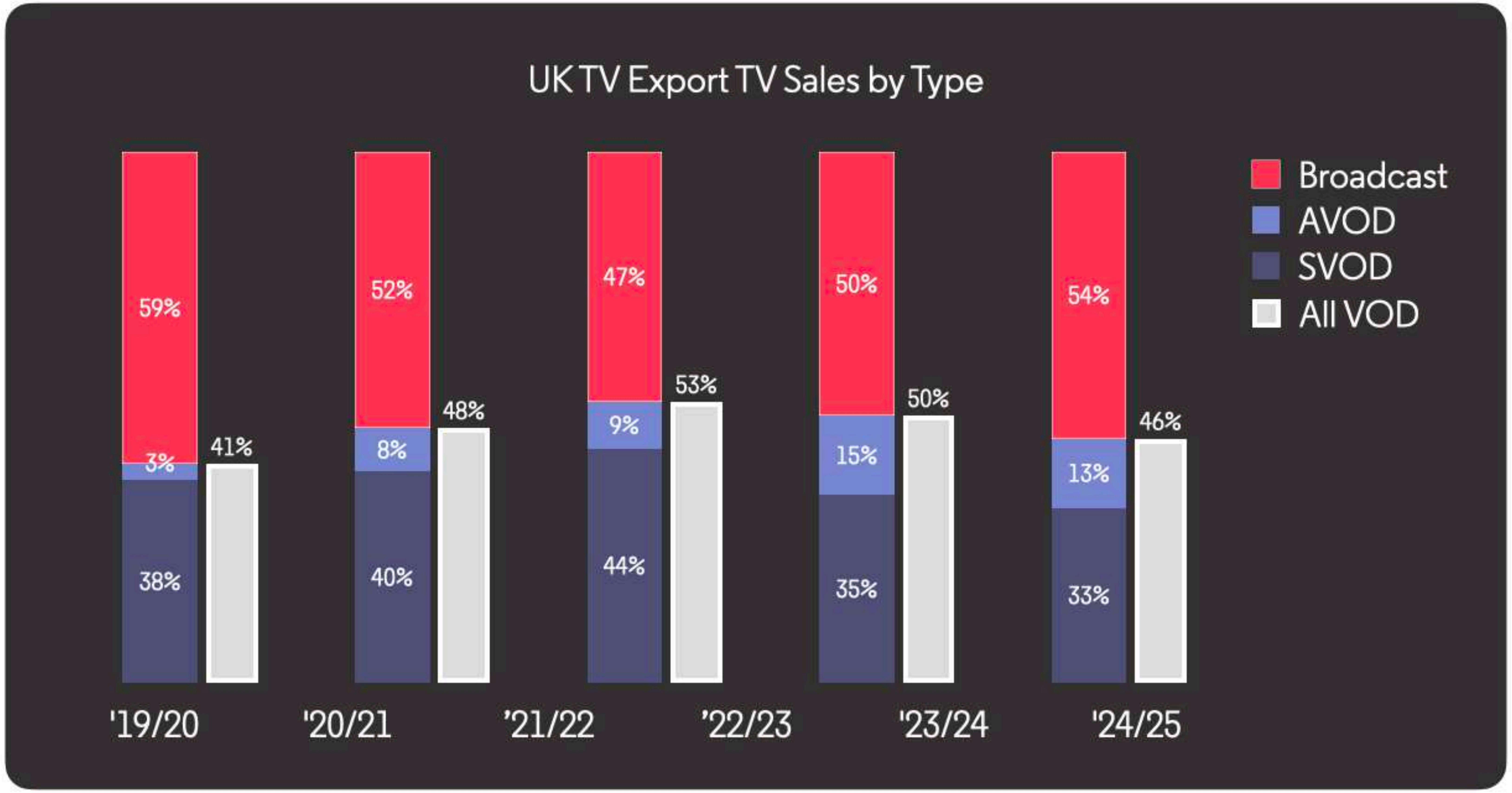


The international distribution market has seen significant changes over the years and more recently external challenges have contributed to the need for players to evolve and adapt as conditions have become tougher.

The source of Export revenues has been changing over the lifetime of the Pact Export Report, most notably with the steady decline in share of revenues for TV sales from 70% in 2019/20 to 53% in the current reporting year.

Formats, Co-Productions and International Productions have grown to consistently represent around 36% of revenues. There has also been a significant increase in 'Other' revenues, now representing 11% of total exports, with this including income derived from licensing a UK TV property overseas for ancillary, non-programme use, for example merchandise and books.

UK TV Exports Report
TV Sales by Service Type

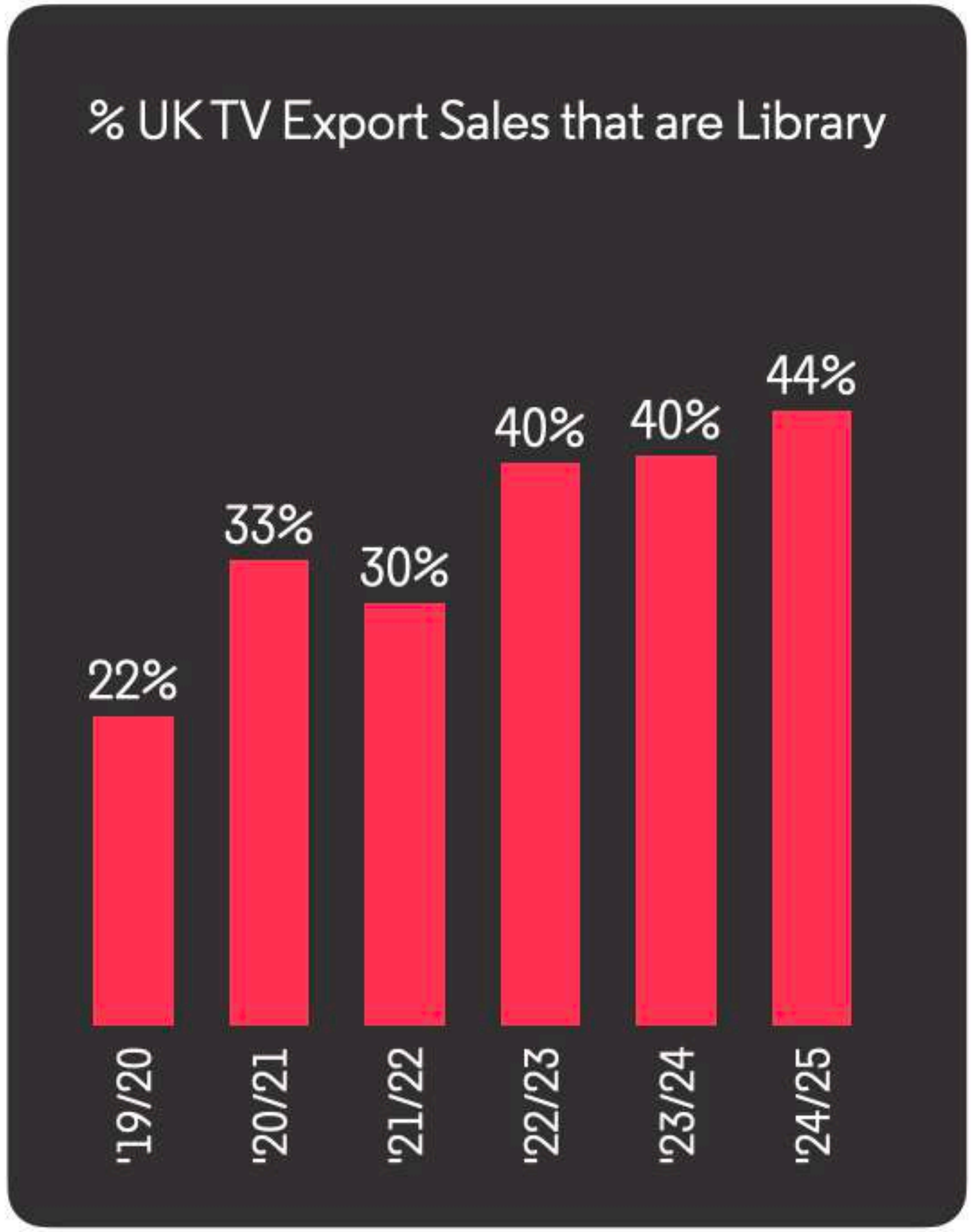


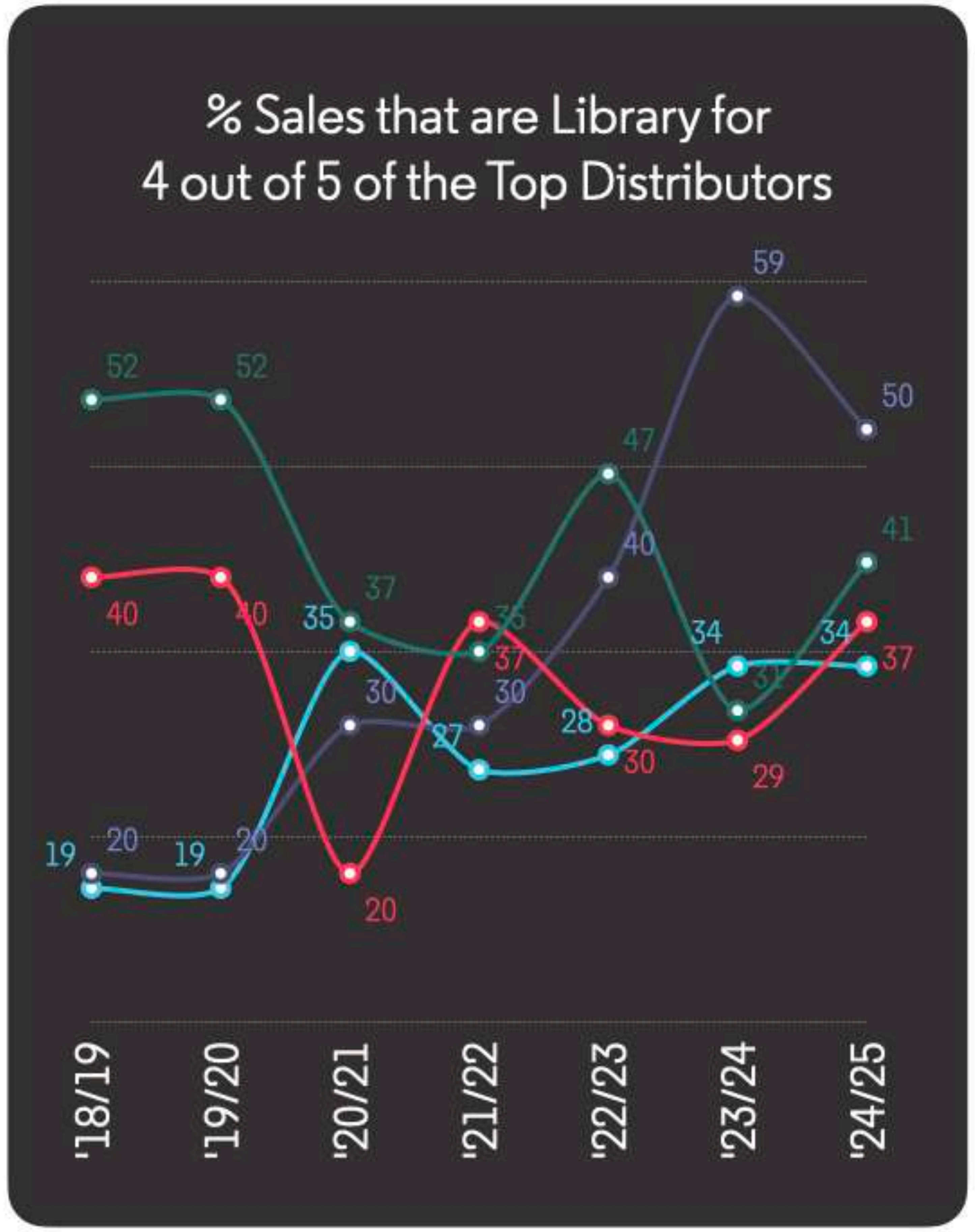
This year, TV Sales continued its somewhat contradictory shift back to the Broadcast category, with 54% of sales now to broadcaster clients, up from 50% last period.

SVOD sales declined to 33% of total sales, while AVOD's share within the VOD category fell from 15% to 13%, bringing the overall VOD category's share of export revenue down to 46%.

The increase in broadcast share may be indicative of the increased BVOD and adjacent linear licensing activity that has been growing in global markets.

UK TV Exports Report
TV Sales by Service Type



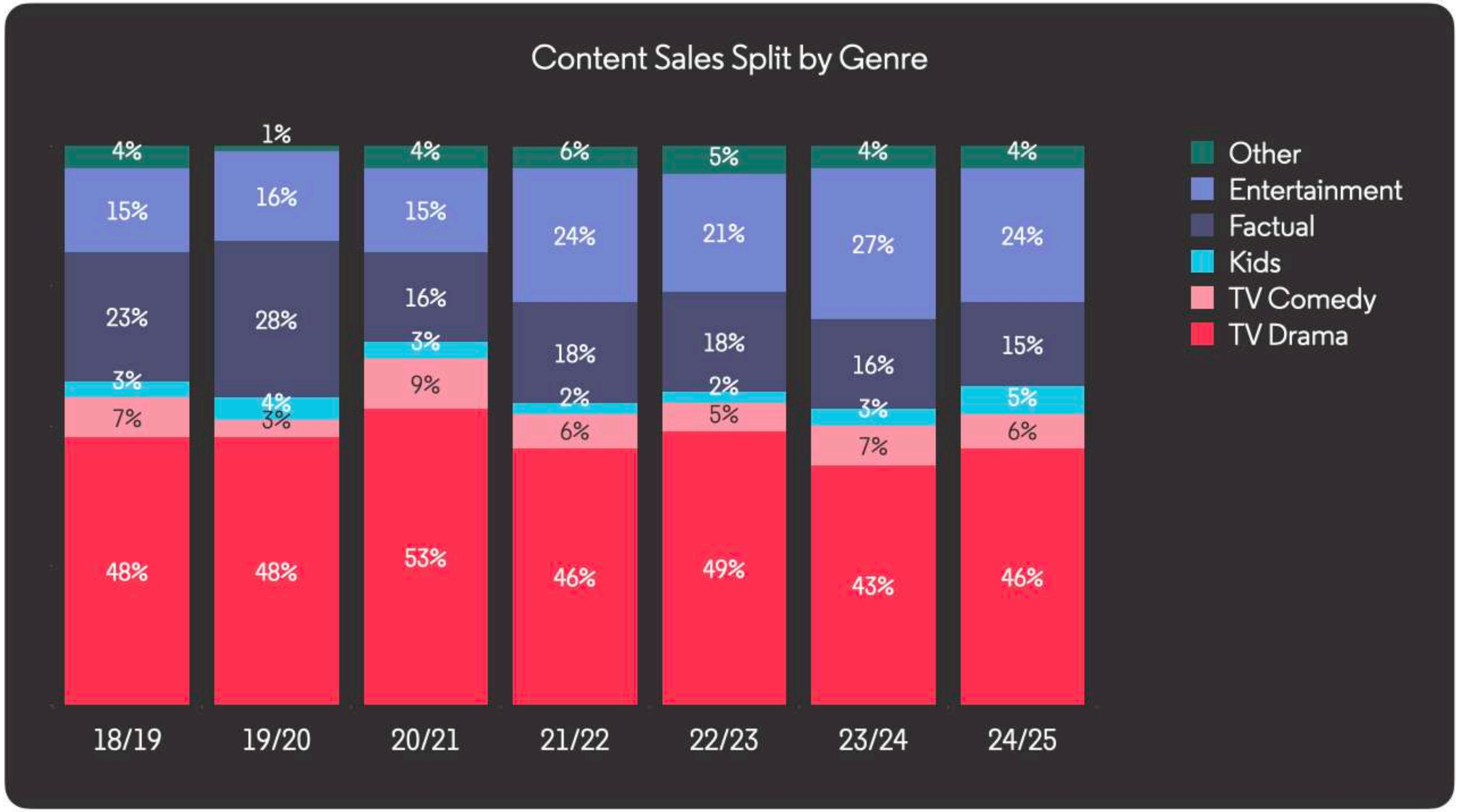


Library revenue as a % of TV Sales reached a high of 44%, perhaps highlighting the strength and depth of the UK's library of content.

With different catalogue sizes the proportion of sales as library varies by distributor but in most cases a rise in the share of sales to library was reported. However, as can be seen from the % value for four of the top five UK distributors there were some exceptions.

It is clear though that distributors are working harder and finding more innovative ways to window and sell content and library sales may be providing a budget-starved market with an economic solution to finding great content.

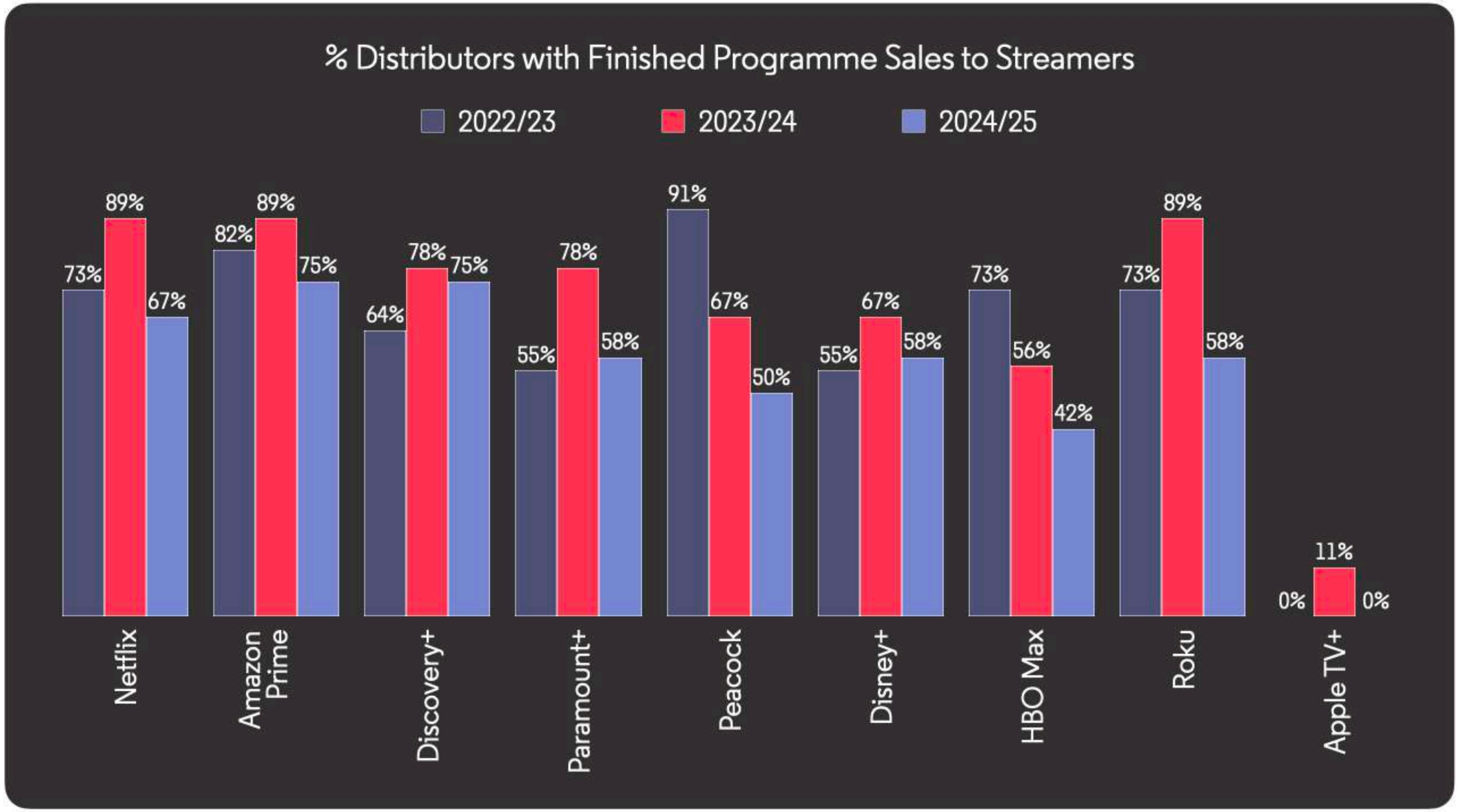
UK TV Exports Report
Exports Sales by Genre



Scripted drama continues to dominate, accounting for 46% of revenue, with its share of total exports up 3% year-on-year.

Entertainment's share fell by 3% after a 6% gain last year, now representing 24% of total exports.

Meanwhile, Comedy and Factual saw declines in their export shares, whilst Kids experienced growth.



UK-based distributors continued to place their programming with streamers in 2024/25 but there was a decline across all services.

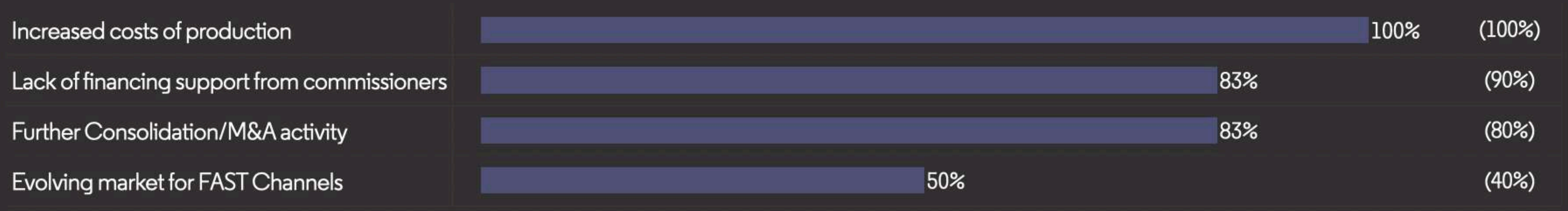
In last year's report only NBCU's Peacock and Warner Bros. Discovery showed a decline in activity with UK distributors, whereas this year all services showed a drop, with HBO Max and Peacock falling further.

In 2024/25 Have you secured revenue from deals with the following global streaming services?

UK TV Exports Report
Future Impact on Distribution

This year, all respondents highlighted the challenges posed by rising production costs, with 83% also citing a lack of financial support from commissioners. Consolidation and M&A activity ranks highly as does the potential of FAST. Half of respondents believe that the FAST market will impact demand for UK programming next year, reflecting an increase in interest compared to last year - which followed a fall from 73% in 2022/23. The issue of lower budgets among buyers was also selected by half of the recipients as a key ongoing issue in the market.

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



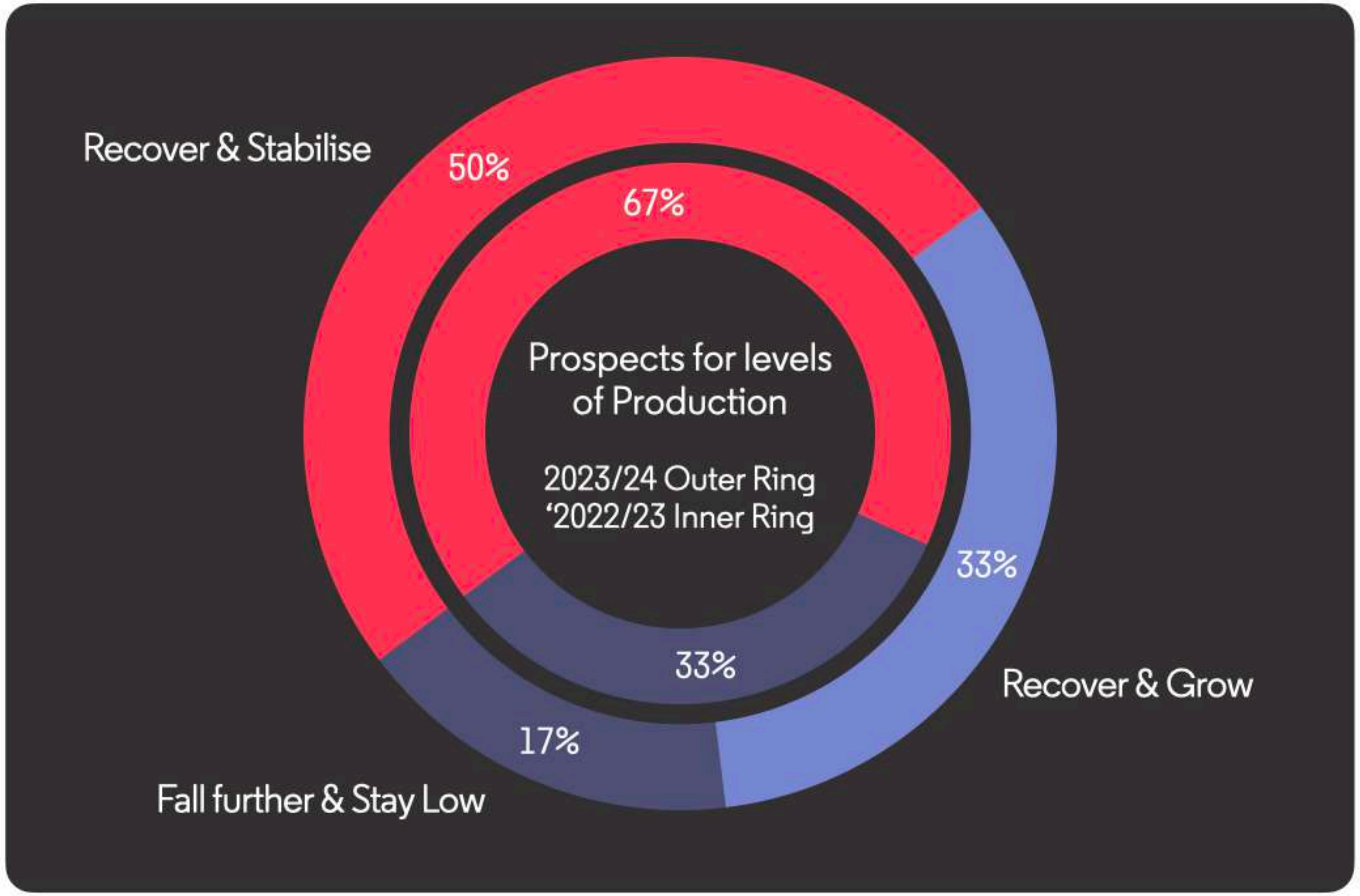
Note: Value in brackets represents last year's figure

In the context of a challenging global market for TV we asked respondents for their views on the prospects for levels of production in the industry.

Half of the respondents believe the current challenges are temporary, expecting the market to recover and then remain steady.

17% feel the sector has yet to fully absorb the current impacts, anticipating further declines before stabilising at lower levels - compared to 33% last year.

33% expressed outright optimism about production growth, a positive shift compared to last year, when no distributors expected production levels to recover.



Q. Which of the following statements do you agree with?

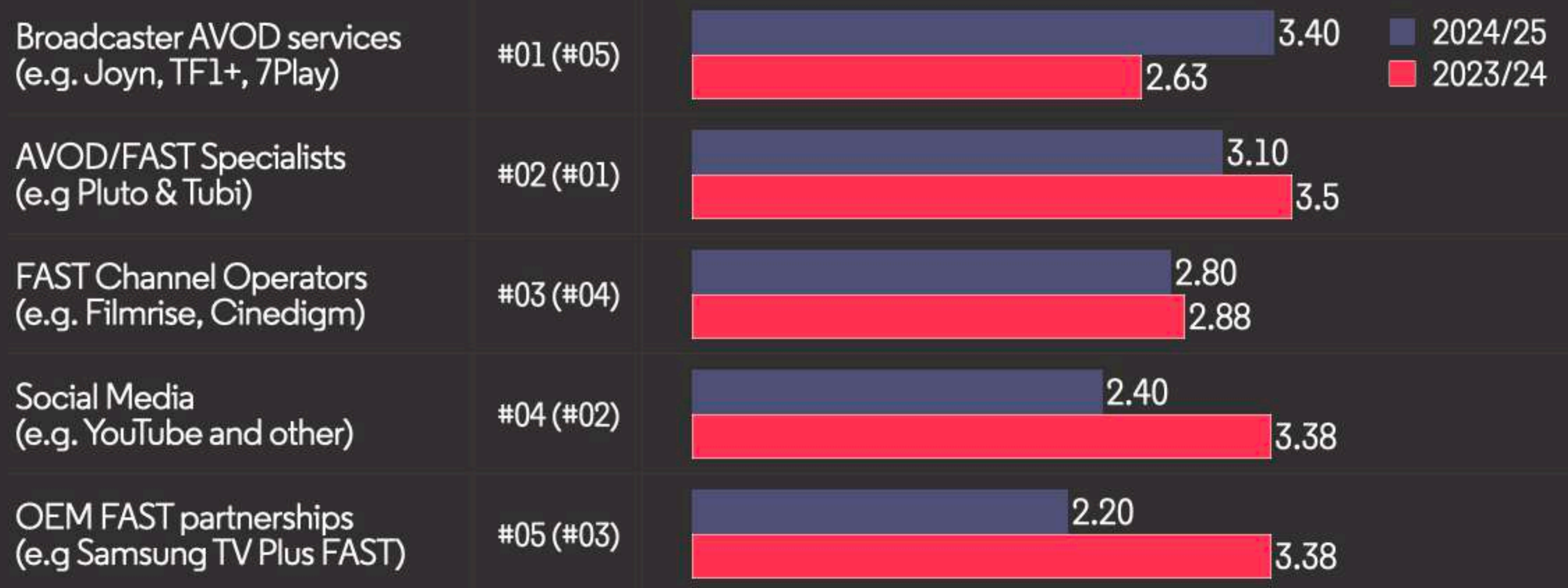
UK TV Exports Report
AVOD Focus

Advertiser-funded models saw a resurgence in 2023, with SVOD players placing greater emphasis on ad-supported tiers, AVOD services launching and intensifying efforts, and FAST continuing to expand into global markets.

Given this growing focus on ad-supported streaming, we explored AVOD further with respondents, asking them to rank their revenue priorities across five different categories of service providers.

This year Broadcaster AVOD service specialists came out on top, growing from 5th placed to 1st, reflecting the growing activity in global markets with broadcasters and their adjacent digital services.

Q. Ad funded models saw a resurgence in 2023, with SVOD players focused more on Ad-Tiers, AVOD services launching and intensifying efforts and FAST continuing its drive to expand into global markets. Score 1-5 (5 strongest) the following in terms of your revenue priorities for the coming year.



Note: Value in brackets represents last year's ranking

90% of respondents stated that licensing content directly to FAST channels operated by service providers is a key focus, and nearly all also see launching their own channels as an important area. As with last year, licensing content to independent FAST channels remains the lowest priority, but notably, distributors are exploring multiple avenues, maintaining a broad perspective on a business that still needs to optimise its approaches. At least 50% of distributors view all five monetisation models for FAST as viable opportunities to license their content.

Q. The market for FAST channels continues to generate huge interest with options to monetise through licensing content to channel providers and operating your own channels - where is the focus of your business?

Licensing content directly to FAST channels operated by Service Providers (e.g. Samsung, Pluto, Freevee)	90%	(100%)
Launching owned FAST channels and securing distribution with plaftorms	70%	(89%)
Launching channels in partnership with Service Providers	60%	(33%)
Licensing content to content aggregators who operate multiple FAST channels	50%	(56%)
Licensing content directly to independent FAST channels with no Service Provider ownership	50%	(22%)

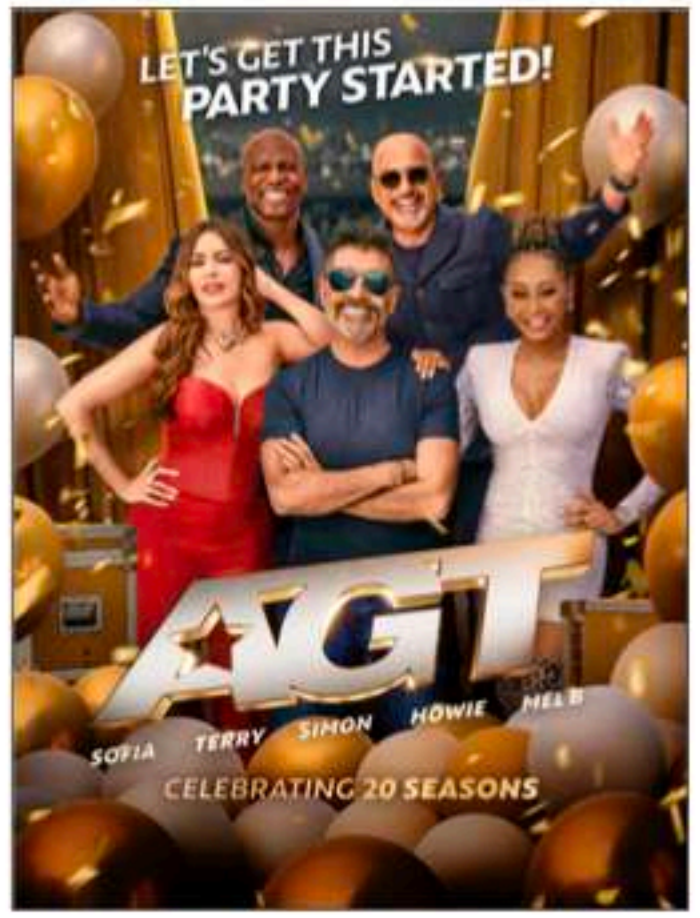
Note: Value in brackets represents last year's figure

Fremantle

Bob McCourt,
Chief Operating Officer,
Commercial and
International, Fremantle

"Despite a challenging year for the market, it's been a strong year for Fremantle and UK content globally. With UK TV exports including The Responder Season 2, Big Mood, and Nightsleeper reaching record highs across the market, we're seeing renewed confidence and increased demand for British creativity across all 28 territories we operate in. Growth in key territories such as the US, France, Italy, Spain and Australia underlines the strength and versatility of our slate – from entertainment and drama to film and documentaries.

Library content remains an important and dependable part of our business, with catalogue sales playing an increasingly central role in global distribution, which highlights the enduring appeal and value of our storytelling. As we move through 2025, we remain focused on delivering powerful, world-class programming and strengthening partnerships that bring irresistible entertainment to audiences everywhere." "



Top 3 Exporting Titles
America's Got Talent
Sullivan's Crossing
My Brilliant Friend

"Overall the report indicates some encouraging signs, specifically in the US where we are hoping to see further recovery in the pre-sale and acquisition territory . The UK has produced some very strong long-running library titles with proven global appeal - iconic detective series such as Midsomer Murders and warmer family dramas such as All Creatures Great and Small from our catalogue - and these series reliably deliver audiences for our terrestrial buyers and platforms over repeated licence cycles. Additionally, our A-list led scripted titles such as Joan performed well and another staple of the UK production sector, the high-end thriller, saw The Tourist attract buyers' attention across international markets."

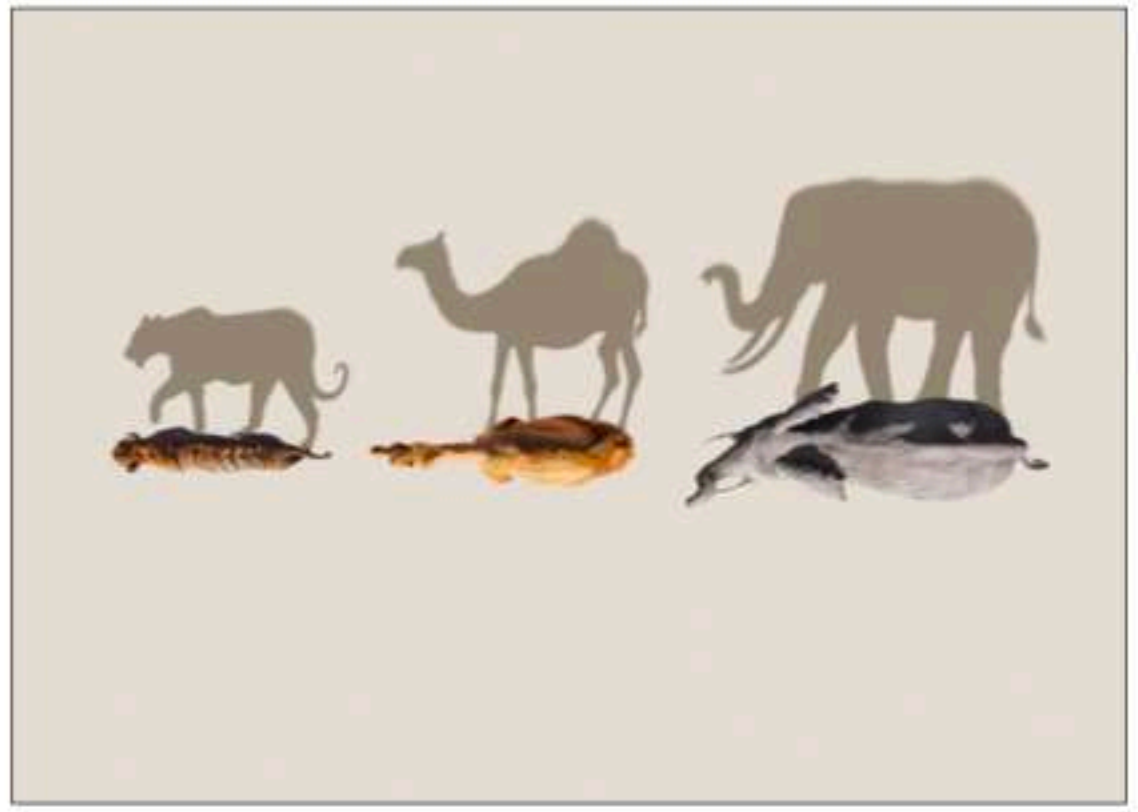
Louise Pedersen, CEO, All3Media International

Top 3 Exporting Titles
The Tourist (S2)
Joan
All Creatures Great and Small

BBC STUDIOS

Janet Brown,
President,
Global Content Sales,
BBC Studios

"In today's dynamic and unpredictable market landscape, BBC Studios is fortunate to work with exceptional creatives across our units, labels, and partners. British storytelling remains a powerful force internationally and together we continue to deliver outstanding British IP to audiences worldwide. We are proud to steward one of the most broad and sought-after content portfolios with globally celebrated titles like Doctor Who, Mammals, and Asia."



Top 3 Exporting Titles
Doctor Who
Mammals
Asia

"Some really encouraging results to this important annual barometer of the UK export market, that I'm pleased to say we're seeing reflected in our day to day business. While buyers are definitely being selective, there has been an increasingly healthy appetite for exciting titles like After The Flood, Ludwig and Love Island All Stars, that fit platform and broadcaster creative and scheduling needs. The US was our largest export market last year and is expanding day by day, along with Canada and Australia and the Nordics. In addition to strong catalogue sales, with the launch of Zoo 55 we are further maximising the value of our 95,000 hours of content and moving it to audiences, wherever they want to watch it."

Ruth Berry, President, Global Partnerships & Zoo 55, ITV Studios

Top 3 Exporting Titles
After the Flood
Ludwig
Love Island All Stars

Selected other Distributors

Banijay	Masterchef
	Grantchester
	Survivor
Bossanova	Borderforce USA
	Caught on Dashcam
	…By Train (franchise)
DLT	My Family
	The King, The Prince and Their Secret Millions
	As Time Goes By (Reunion Specials)
Hat Trick	Di Ray
	George Clarke's Amazing Spaces
	Whose Line Is It Anyway USA

Rawcut	Police Interceptors
	Terror at 30,000 Feet
	Pursuit and Capture
Sony Pictures Television	Who Wants To Be A Millionaire
	Dragon's Den
	Raid the Cage
SphereAbacus	Witches: Truth Behind the Trials
	The Boy That Never Was
	Scrublands: Silver
Woodcut	Titanic In Colour
	WW2: Women On The Frontline
	The Suitcase Murders

UK TV Exports Report Sponsors

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 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. ITV Studios is home to some of the best creative minds, crafting around 7,500 hours of original programming across 60 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 95,000+ hours to broadcasters and platforms around the world.

Zoo 55 has 170+ owned and operated channels in the social space delivering over 25bn views in 2024, as well as 27 FAST channels on 200+ channel feeds globally. It launched a new label, Zoo 55 dedicated to expanding its digital and gaming activity, in January 2025.

ITV Studios is part of ITV PLC, which includes the UK's largest commercial broadcaster ITV and the ad-funded, free streaming home for ITV, ITVX.

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. tl 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.

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