



# UK TV Exports

A global view in 2016/17

# Foreword...





## Rona Fairhead

Minister of State at the Department  
for International Trade

**This year marks a new format of the UK TV Exports Report. This important report shows that the UK is still a leader in producing enjoyable, high-quality programmes that are popular with viewers around the world.**

From meticulously-created dramas such as *Victoria* and *The Crown* to the visually stunning documentaries of *Blue Planet II*, the UK has a talent for creating shows that both entertain and educate. These programmes tell us something about the world in which we live, about how we got here and how our world will be shaped in the future. That they do all this without losing commercial appeal only emphasises the distinctive skills of our programme makers across all genres.

In 2016-17 the UK performed strongly in sales of TV content. The USA and France are key markets, testimony to the common values that we in the UK share with each of these very different countries.

And while finished TV programming is the major source of revenue, the growth of streaming services such as Netflix and Amazon is driving digital revenues – accounting for £225 million of sales in 2016-17.

At the Department for International Trade, we are proud to work in partnership with this industry to ensure that independent British programme-makers are given the support they need to reach the widest possible international audience.

DIT's Tradeshow Access Programme has supported UK independent TV producers to meet international partners and distributors at shows such as Rio Content / MIPTV / Banff / Shanghai TV / MIPCom / MIPJnr / MIP Cancun / NATPE and Realscreen.

Earlier this year and working closely with Pact, the UK hosted major Chinese broadcasters and leading TV production companies, on an exchange programme providing good opportunities for TV and film companies from both countries to meet, to immerse themselves in each other's operations and discuss ideas for possible future collaborations. Signing of the UK-China TV Co-production treaty was ratified during the Prime Minister's visit to China early this year - making the UK only the second country to have both film and TV co-production treaties with China.

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. ●



**The UK TV 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 BIG PICTURE

- In 2016/17, estimated total revenues from the international sales of UK TV programming and associated activities topped £902m.
- With sales of £335m, the USA holds the position of the UK's largest export market.
- Australia and France were the second and third largest markets, with Australia accounting for £73m of sales and France £60m. France was the UK's biggest non-English speaking market.
- North America represented the largest share of total revenue, at 40%, with Europe at 33% and 27% contributed by the rest of the world.
- Pan-territory deals made up 3% of the total revenue, with Pan-territory worldwide deals bringing in most sales, at £14m.

## WHAT'S HOT?

- Finished TV Programming was the largest source of revenue at £404m, representing 45% of total revenue. Digital revenues accounted for a quarter of the total, with £225m worth of sales.
- Licensing and miscellaneous content brought in the smallest proportion of revenue – just 3%, at £23m.
- Sales of Finished TV Programming made up a smaller share of total revenue from North America, compared to both Europe and the Rest of the World; but North America contributes the majority

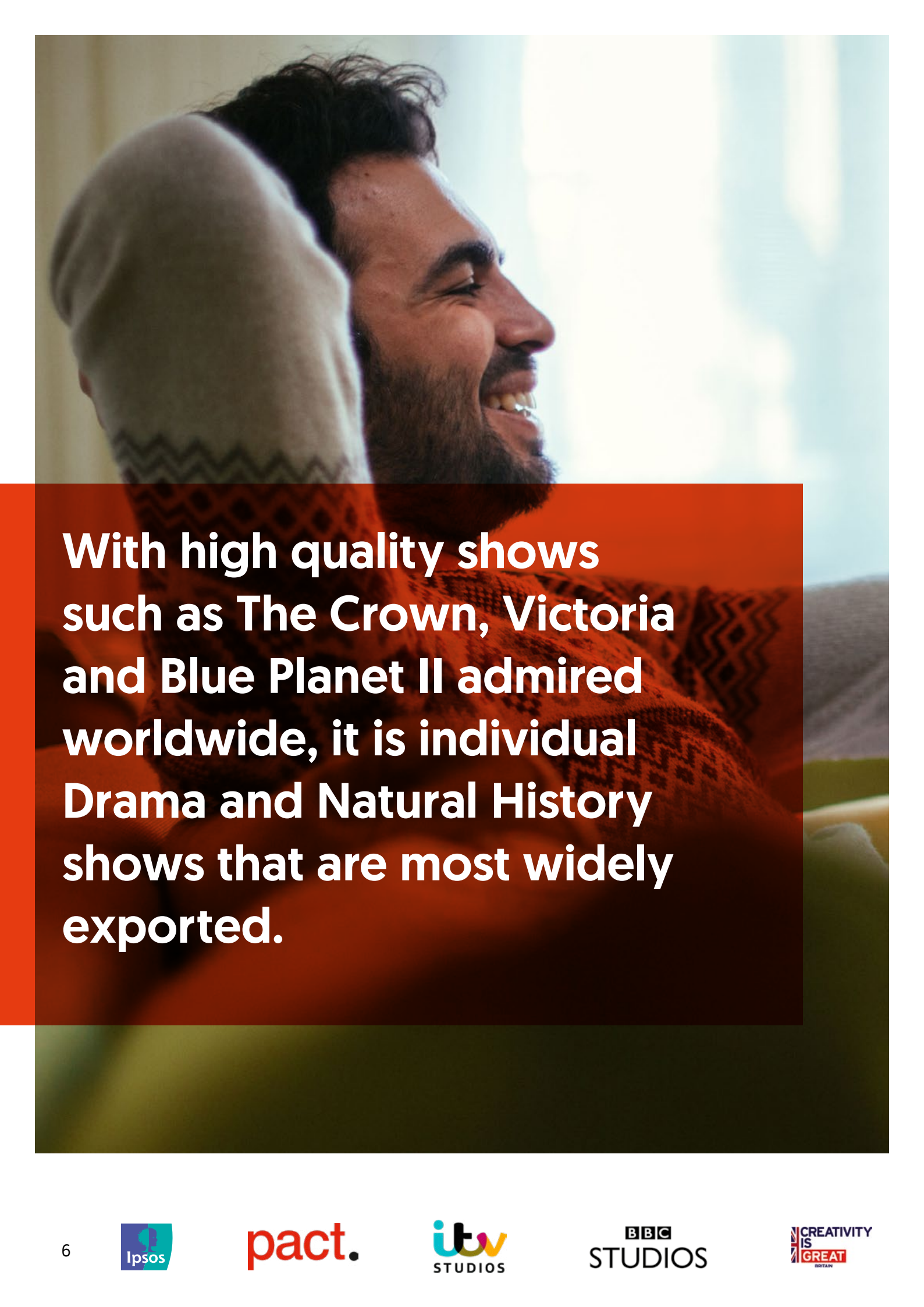
of revenue across DVD, Digital Rights, Co-production and Production. It is Europe, however, which is the biggest market for Formats.

## FUN, FACTS AND QUEENS

- Information on genre was included in the report to provide more insight into which genres were best at driving sales. Entertainment was the bestselling genre as a whole, followed by Factual content. In terms of territories, the Rest of the World contributed to most sales across these genres.
- Strong sales from the likes of The Crown and Victoria meant that the top exporting shows were Drama, followed by Documentaries and Natural History, the latter being boosted by the popularity of Planet Earth II.

## COMING UP

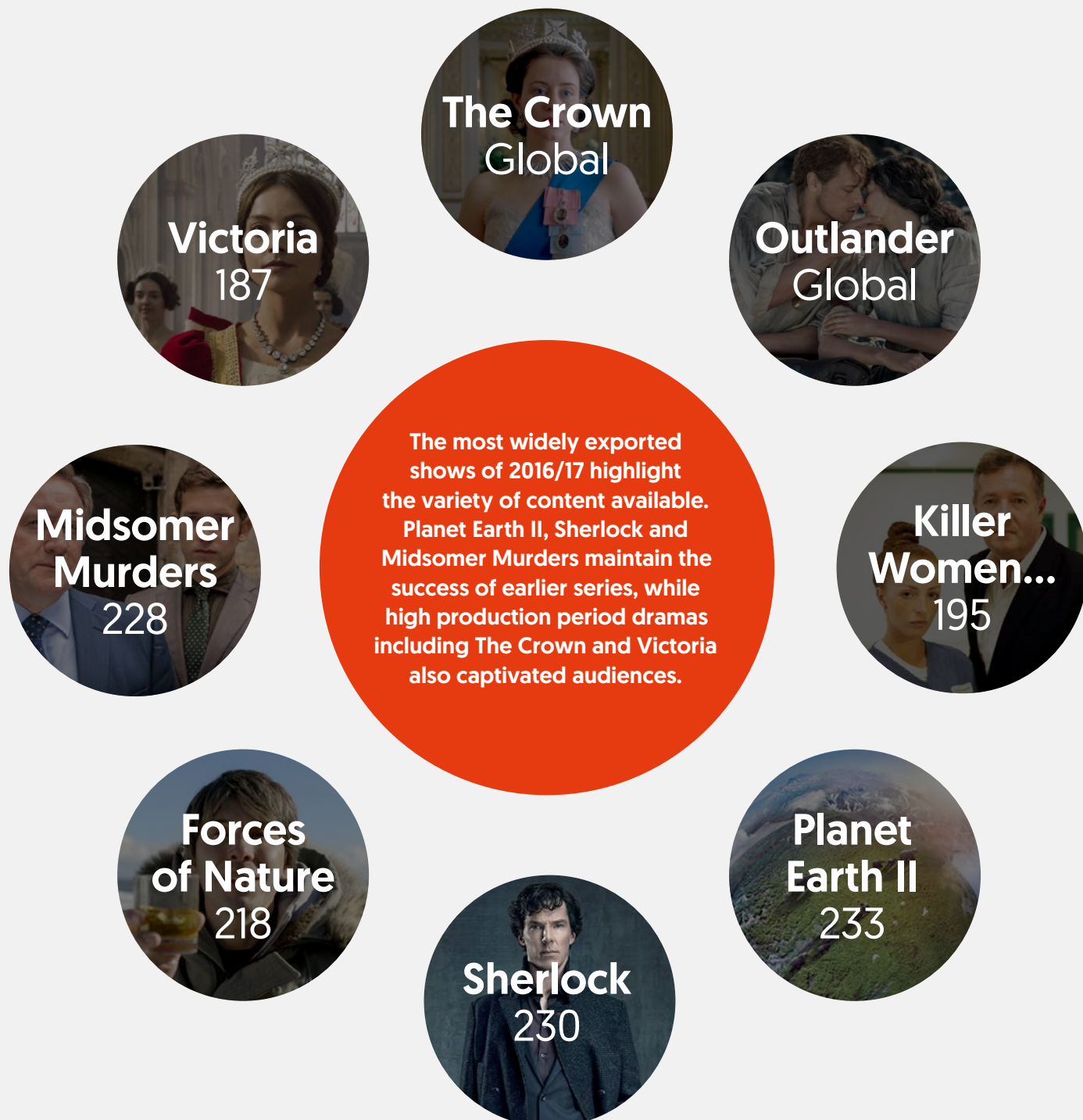
- Most respondents were confident that their revenue would grow in 2017/18. There was particular focus on increased sales to China, alongside more established territories such as the USA and Europe.
- Territories with the potential for more opportunities for the UK were China, along with the rest of South-East and East Asia and the USA. The UK-China TV Co-production treaty offers the opportunity for the UK and China to further build great content together. Both Factual content and Entertainment were the two genres in which the highest growth was expected.
- Uncertainty in the European market, driven by Brexit, as well as the growth and dominance of streaming players are the talking points of the industry. Finding ways to leverage these changes is considered key for growth in the coming year.
- The growth of SVoD, and the movement into commissioning and co-production by major players such as Netflix and Amazon, highlighted the need for companies to adapt to this ever-evolving market.



**With high quality shows such as The Crown, Victoria and Blue Planet II admired worldwide, it is individual Drama and Natural History shows that are most widely exported.**

# Highlights of the year

Widely exported shows of 2016/17



The number shown beneath the show title indicates the number of territories to which they are sold.



# Sales by territory

FY 2016/2017 (£million)

**America first?**  
The USA is the UK's largest TV export market, contributing 37% of revenue.

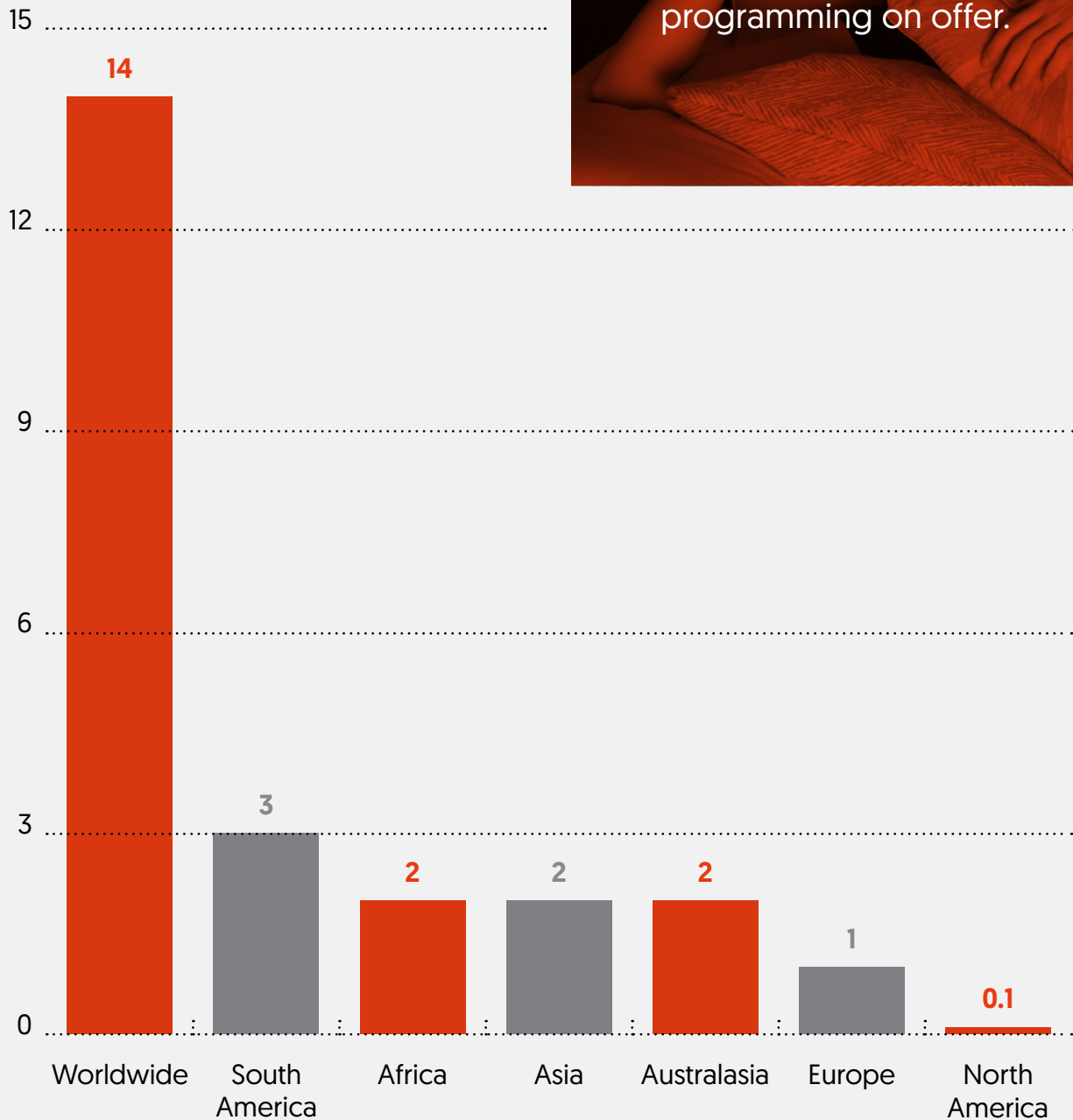
This is followed by Australia and France, highlighting these as critical territories to export revenue.

TERRITORY	FY 2016/2017
USA	335
AUSTRALIA	73
FRANCE	60
GERMANY	52
NORDICS	51
REST OF W. EUROPE	46
CANADA	30
CHINA	25
ITALY	24
REST OF C. EUROPE	19
NZ	14
REST OF LATIN AMERICA	14
SPAIN	14
JAPAN	13
POLAND	9
BELGIUM	9
SOUTH AFRICA	9
NETHERLANDS	9
SOUTH KOREA	7
REST OF ASIA	6
REST OF SOUTH EAST ASIA	6
REST OF MIDDLE EAST	4
RUSSIA	4
INDIA	4
TURKEY	3
REST OF SUB-SAHARAN AFRICA	3
BRAZIL	3
ISRAEL	3
UAE	1
MEXICO	1
SINGAPORE	1
NORTH AFRICA	1
INDONESIA	0.2
NIGERIA	0.1
REST OF AUSTRALASIA	0.01
REST OF THE WORLD	25
PAN TERRITORY DEAL: AFRICA	2
PAN TERRITORY DEAL: ASIA	2
PAN TERRITORY DEAL: AUSTRALASIA	2
PAN TERRITORY DEAL: EUROPE	1
PAN TERRITORY DEAL: NORTH AMERICA	0.1
PAN TERRITORY DEAL: SOUTH AMERICA	3
PAN TERRITORY DEAL: WORLDWIDE	14
<b>TOTAL</b>	<b>902</b>



# Pan-territory sales

FY 2016/17 (£million)



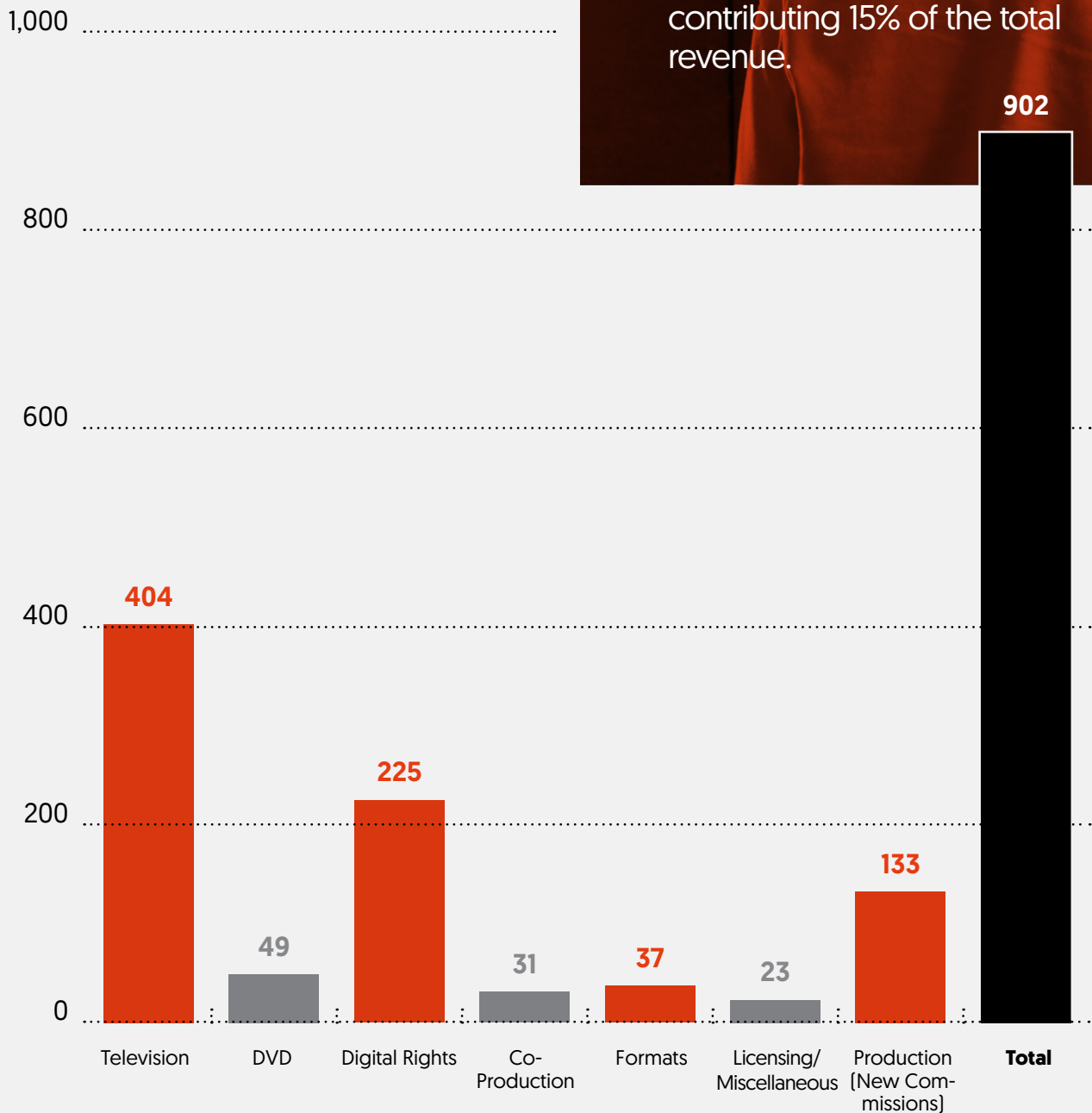
**Around the world in 14m deals: Worldwide pan-territory deals are much larger than other pan-territory agreements.**

UK TV content appeals to worldwide markets, highlighting the quality and range of programming on offer.



# Sales by type

FY 2016/2017 (£million)



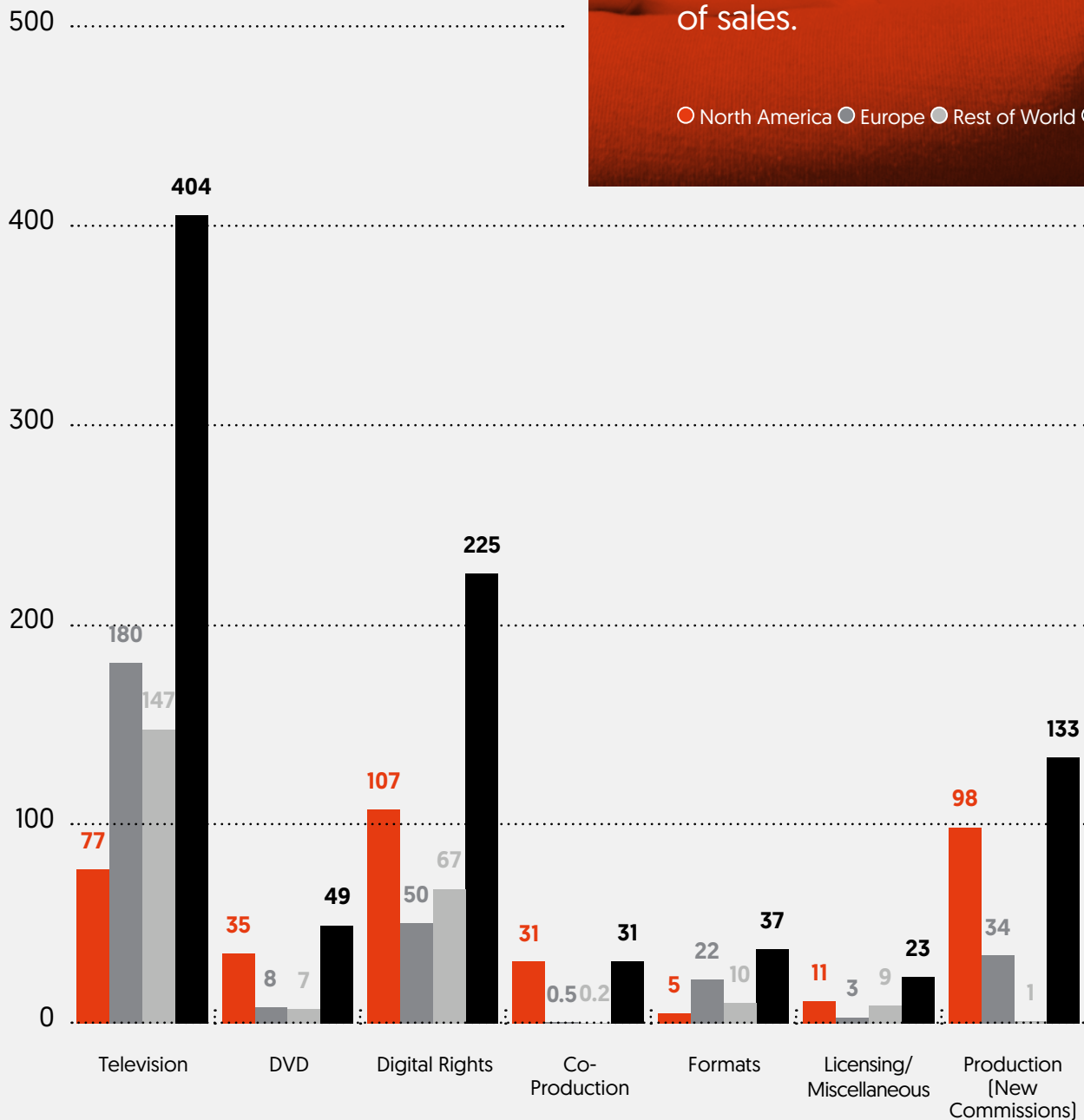
Streaming fever: Digital rights performed strongly, driven by the big streaming platforms. But Finished TV Programming drew in the biggest chunk of revenue.

Further to this, New Commissions demonstrate their value by contributing 15% of the total revenue.



# Sales by type

FY 2016/2017 (£million)



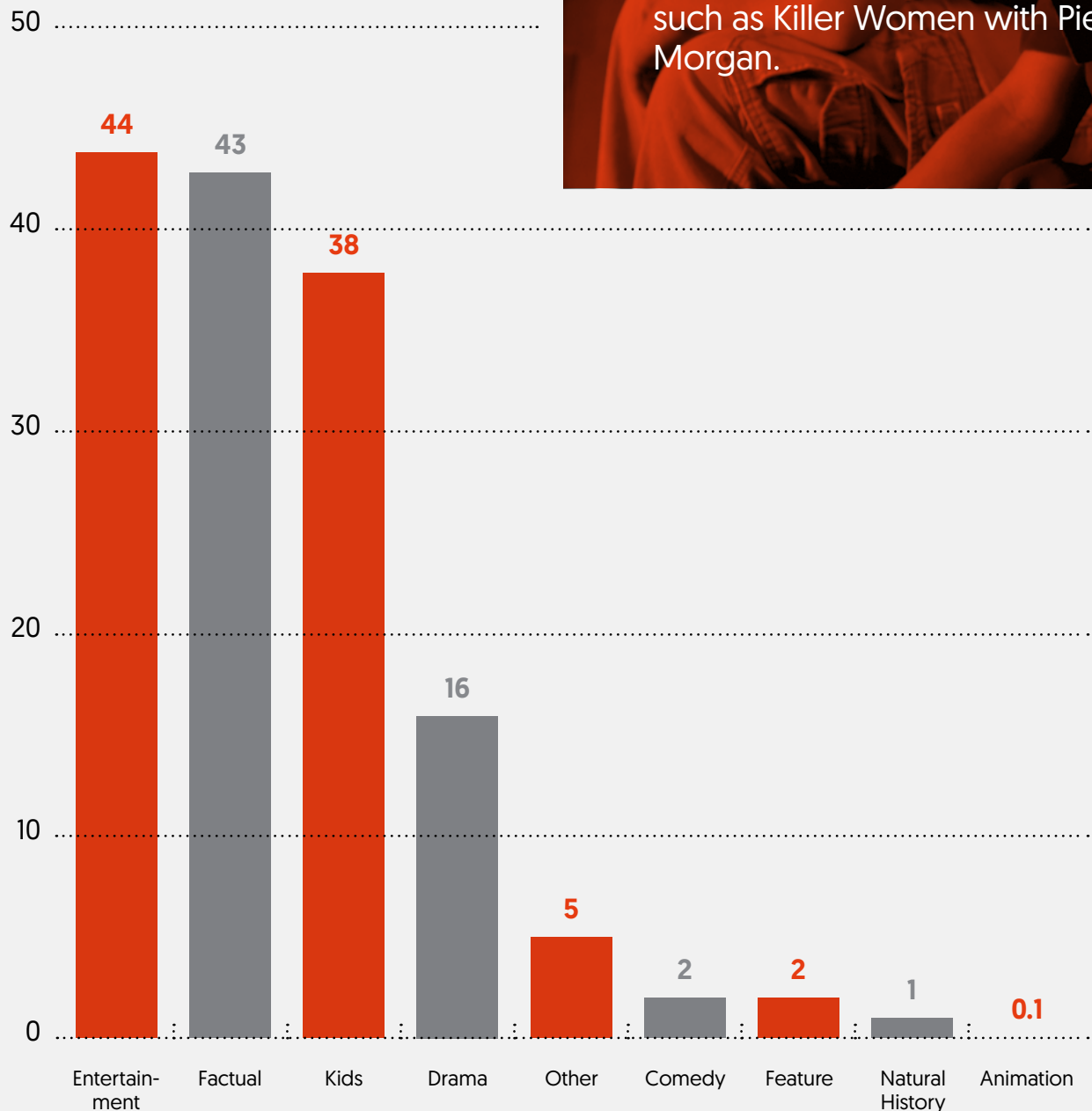
**Digital USA: The USA contributes the least to Finished TV Programming, with stronger sales in Digital and Production.**

The strength of homegrown content in the USA opens up more opportunity for these type of sales.

○ North America ● Europe ● Rest of World ○ Total

# Sales by genre

FY 2016/17 (£million)



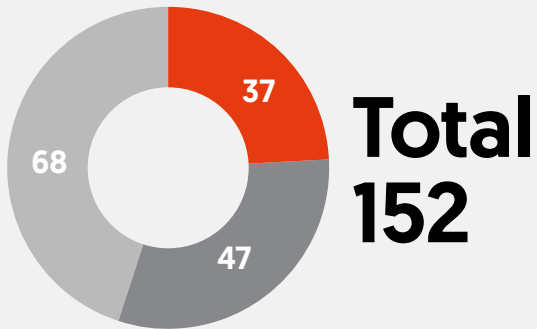
Here we are now, entertain us: Entertainment and Factual content accounted for the majority of sales, followed by Kids.

The strength of these genres is reflected in the success of shows such as Killer Women with Piers Morgan.



# Sales by genre

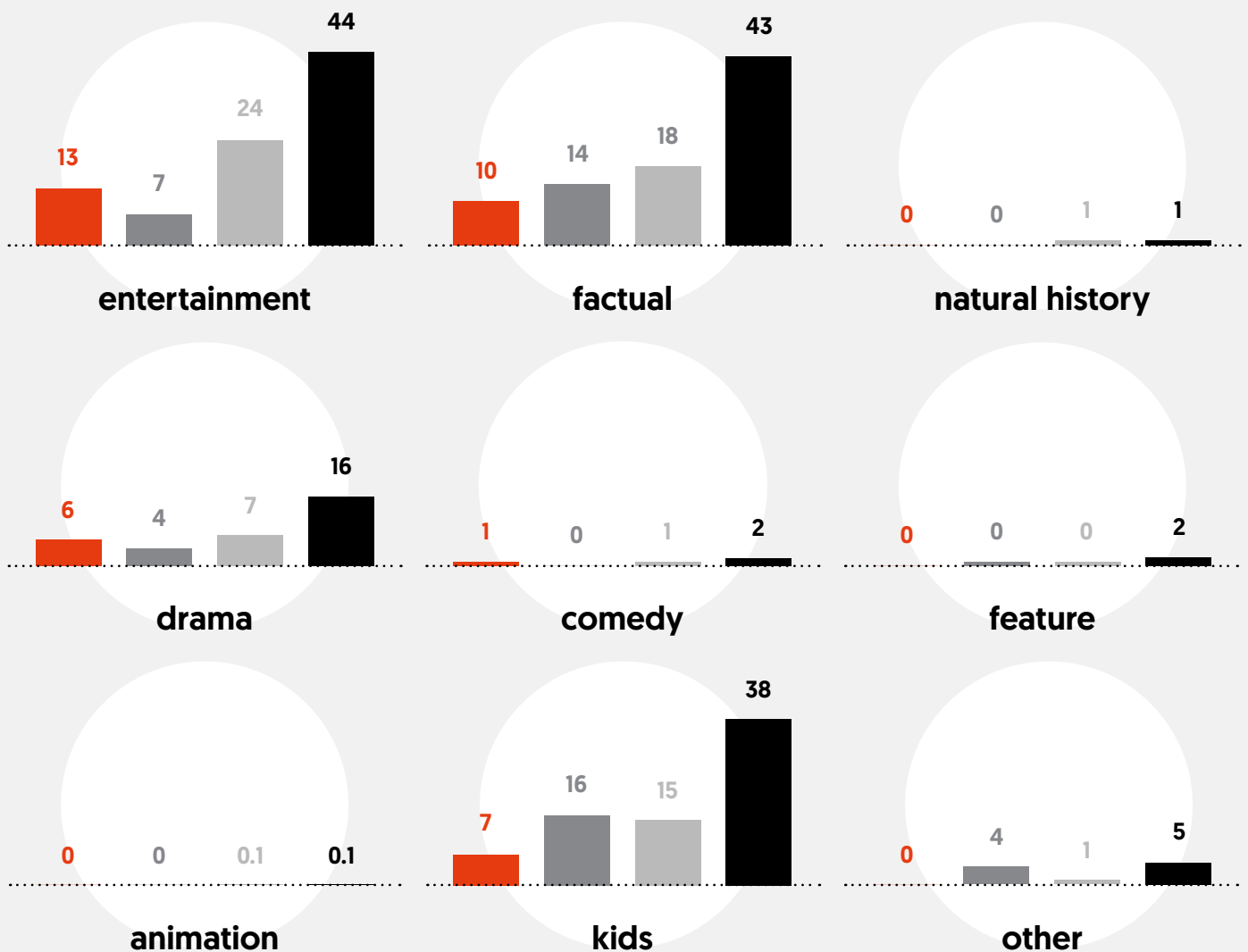
FY 2016/17 (£million)



**Facts still matter: Factual content is still popular around the world. It accounted for most sales, after Entertainment, and was the second strongest seller in the USA.**

Factual content continues to perform strongly given its ability to transcend cultural and language barriers.

● North America ● Europe ● Rest of World ○ Total



**Notes** | Genre data is based on 14 responses due to part-complete survey data received.

## **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 STUDIOS**

BBC Studios, trading as BBC Worldwide in the period this report covers, a global content company with British creativity at its heart, is a commercial subsidiary of the BBC Group. Formed in April 2018 by the merger of BBC Worldwide and BBC Studios, it spans content financing, development, production, sales, branded services and ancillaries. BBC Studios' award-winning British programmes are internationally recognised across a broad range of genres and specialisms. It has offices in 22 markets globally, including six production bases in the UK and production bases and partnerships in a further nine countries around the world. The company, which makes 2500 hours of content a year, is a champion for British creativity around the world and a committed partner for the UK's independent sector. BBC Studios has revenue of £1.4bn, and returns around £200m to the BBC Group annually, complementing the BBC's licence fee and enhancing programmes for UK audiences.

## **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 is the trade association  
representing the commercial  
interests of UK independent  
television, film, digital, children's  
and animation media companies.**

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