

Audiovisual fiction production in Europe - 2023 figures

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Introduction and methodology

This report provides an analysis of the production of audiovisual fiction in Europe in the period 2015-2023(*). Audiovisual fiction is defined here as live-action fiction TV films and series commissioned by television channels or on-demand services.

The data

- The underlying data used in this report were provided by Media-press.tv. Media-press.tv systematically reviewed the programming schedules of over 200 TV channels and on-demand services to identify original European fiction. The selected services are the respective TV and SVOD audience leaders in the tracked countries. Although some minor channels may also produce some original fiction, most of them are dedicated to reruns or imported programming.
- The data provided by Media-press.tv were complemented by the European Audiovisual Observatory.
- We would like to thank the team at Crew United for providing us with complementary data.

Definitions

- In this report, a “title” refers to either a TV film or a TV season. Each different TV season of a TV series is counted as one title.

(*) EU27, the United Kingdom, Norway and Switzerland

- Titles have been broken down by **format**: TV films/collections, series with 13-episodes-or-less-per-season, series with 14-to-52-episodes-per-season, and series with more-than-52-episodes-per-season. A limited number of TV films have two episodes; they are nevertheless considered as TV films. Some TV films belong to **collections** (e.g. Germany's "Tatort" or France's "Meurtres à...") with several episodes produced each year. They are either counted as TV films (if different production companies are involved) or TV series (if the same production company produces all episodes). Some data in the previous editions of this report have been restated, as we have converted TV series into collections.
- The **year of production** of a whole-series season is the year of release of the first episode of the season.
- The **country of origin** of an audiovisual fiction programme is the country of the main commissioner of the programme. In the case of programmes commissioned by a pan-European SVOD service, the country of origin is determined by the production company.
- **International co-productions** are analysed following a broad definition (any programme with at least two producing countries) or a stricter definition, excluding "linguistic co-productions" between neighbouring countries (DE - AT, DE-CH, FR - BE, FR - CH, GR - CY, BE - NL, DE - CH, CZ - SK, UK - IE).
- In this report, "**independent production**" is defined as an AV fiction programme produced by a production company that is not under the control of the broadcaster *commissioning the programme*. This definition does not imply that the producing company retains any rights. Please note that productions from a broadcaster production unit or subsidiary can therefore be either dependent (when produced for the broadcaster) or independent (when produced for a broadcaster from a different broadcasting group).
- In this report, "**Europe**" refers to the 27 member states of the European Union, the United Kingdom, Norway and Switzerland.

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Key findings

TV fiction production in Europe has reached a turning point – the number of titles fell across all formats.

- After a brief post-pandemic return to growth, the production and release of original TV fiction is declining. A 6% drop in the number of fiction titles produced in 2023 was mirrored by an equal reduction in the number of episodes (minus 6%) and a stagnation in the volume of hours (minus 3%) when compared to the previous year.
- The perpetual boom of high-end series has come to an end, as the number of titles for 2023 regressed (minus 2% compared to the previous year). Production hours of series with 13-episodes-or-less-per-season produced in 2023 stagnated, as seasons had fewer and shorter episodes (probably as a way to cope with production costs and inflation).

Despite the downturn, some of the fundamental characteristics of TV fiction production in Europe remained unchanged.

- Telenovelas/soaps accounted for the bulk (61%) of hours produced.
- More than half of all titles produced were series with 13-episodes-or-less-per-season.

The production mix varied considerably between countries.

- With large volumes of telenovelas/soaps produced each year, Germany, Poland and Greece were the leaders in volume of hours produced. Portugal and Spain are two other examples of countries driven by series with more-than-52-episodes-per-season.
- Germany produced the highest number of different titles, with a higher-than-average focus on TV films.
- When focusing on high-end series (13-episodes-or-less-per-season), the UK was eminently the main producer, ahead of Germany, France, Italy and Spain.
- In 2023, most fiction titles commissioned by global streamers were produced in Spain (38) and the United Kingdom (35). Other significant production hubs for streamers were France (27), Italy (21) and Germany (20).

More international non-linguistic co-productions.

- International co-productions accounted for 10% of all fiction titles produced in 2023 and were mostly limited to TV films and series with 13-episodes-or-less-per-season.
- The majority of international co-productions used to be between two neighboring countries sharing the same language (e.g. France and Belgium; Germany and Austria). But non-linguistic co-productions have gradually increased and represented over 50% of all co-productions in 2023.
- Non-linguistic co-productions were driven by the United Kingdom (mainly as a majority co-producer, often with the United States but also with France, Canada and Germany), Germany (often as a minority co-producer and mostly with France but in many instances also with Nordic Countries) and projects between two or more Nordic Countries.
- Spain, despite ranking among the top producers of titles, had relatively few co-productions, maybe because of the weight of global streamers in new fiction projects (Spain ranks first in 2023 – together with the United Kingdom – in number of fiction projects commissioned by global streamers).

Public broadcasters commissioned 55% of titles and 39% of hours.

- Well over half of fiction titles produced in Europe in 2023 were commissioned by public service broadcasters (55%), followed by private broadcasters (31%) and global streamers (14%). Due to their bigger share in daily soaps and telenovelas, private broadcasters produced a higher volume of hours (57%) than public service broadcasters (39%). Global streamers accounted for 5% of hours, as they do not invest in long-running TV series.
- BBC, Netflix, Amazon, ZDF and ARD were the five main commissioners of series with 13-episodes-or-less-per-season.

Production groups: Huge turnover, 3 groups lead.

- Over 2000 production companies/groups produced at least one fiction title between 2015 and 2023, but only 3% of them did so for each of the last nine years. This significant turnover can be attributed to the intense renewal of TV series: on average, between 2015 and 2023, first seasons accounted for more than half of all seasons produced each year.
- In 2023, independent productions accounted for 81% of all titles produced, including 9% from production groups affiliated with a broadcaster but working for a third-party broadcaster. The share of dependent productions was 19%.*
- The Banijay Group, the Mediawan - Leonine Alliance and the RTL Group were the three main producers of independent TV fiction.
- The top producers of TV fiction titles in 2023 were the ARD, Banijay Group, ZDF and the Mediawan-Leonine Alliance. The Banijay Group (11), the RTL Group (10) and ITV (8) had the most geographically diverse selection of production countries.

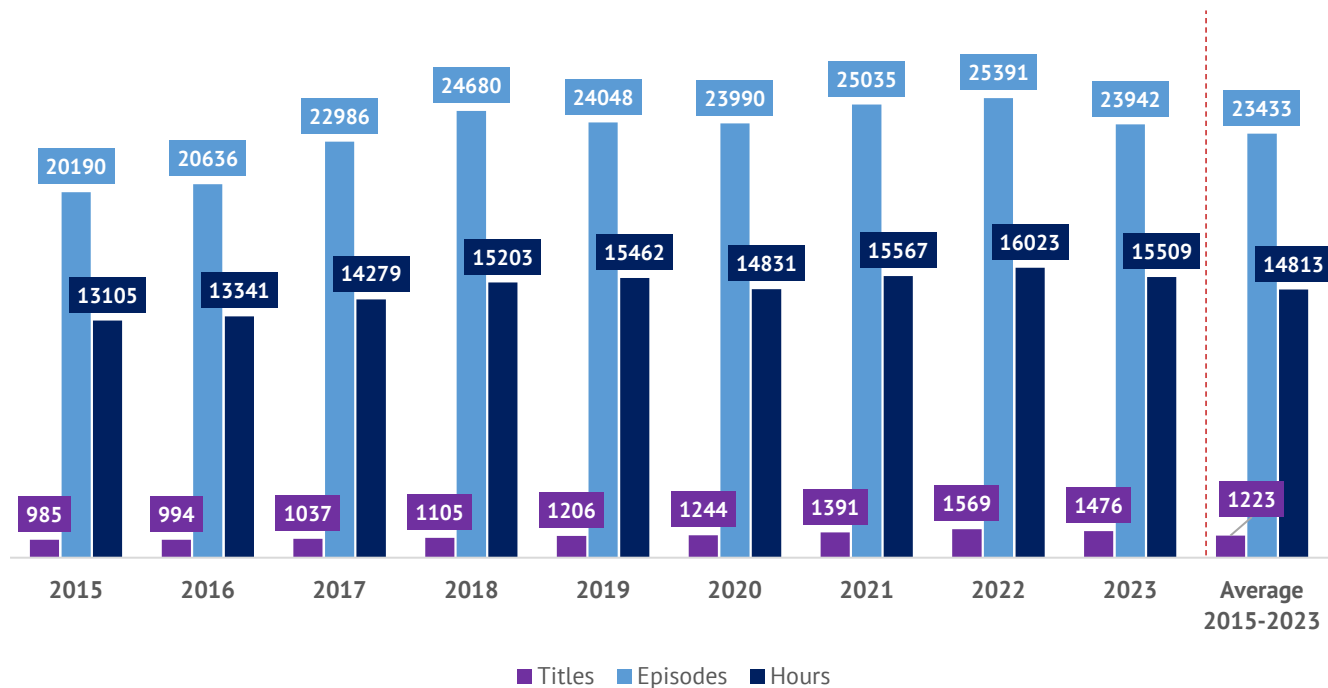
* Please see the definition of an 'independent production' in the [methodology section](#).

Production volume and formats of European audiovisual fiction

After a brief post-pandemic return to growth, the production and release of original TV fiction is declining.

- TV fiction titles and episodes decreased more (minus six percent) than volumes in hours (minus three percent).
- Over 1 200 titles, 23 000 episodes and 14 000 hours are produced each year in Europe.

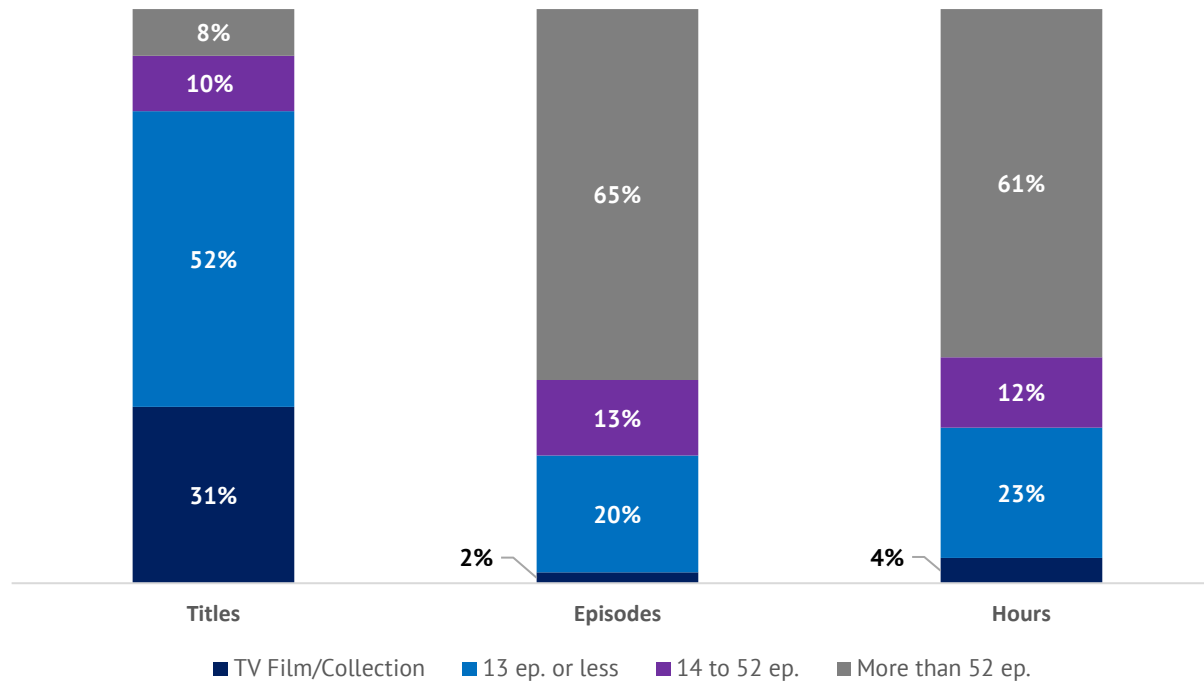
Volume of AV fiction produced in Europe (2015-2023)



Daily soaps account for only 8% of titles, but 61% of hours produced.

- Conversely, TV films and collections represent 31% of titles but only 4% of hours.
- Series with 13-episodes-or-less-per-season account for 52% of titles and 23% of hours.

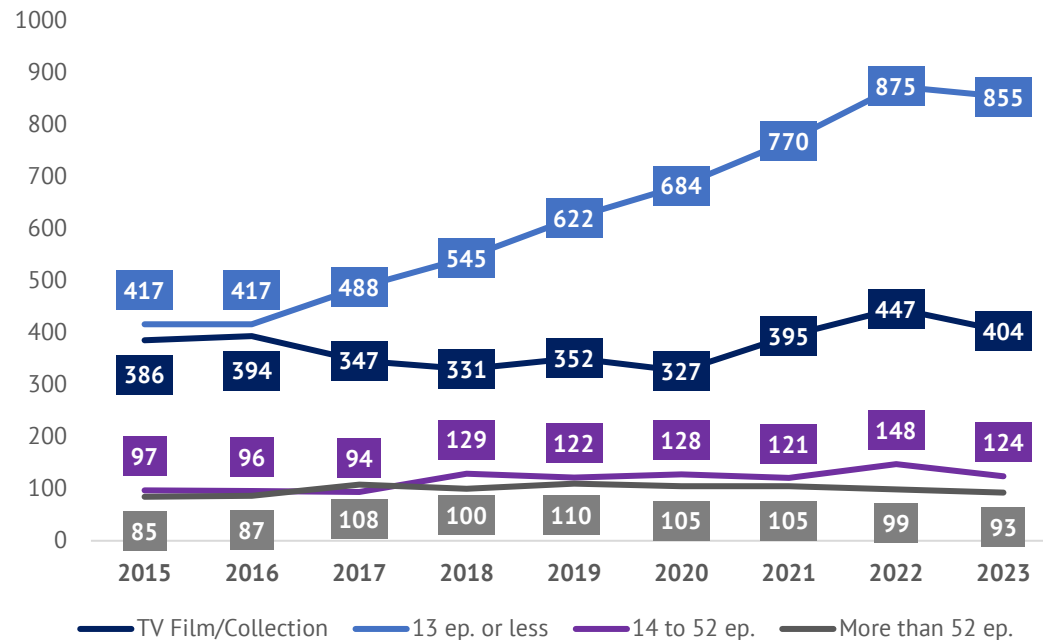
Breakdown of fiction titles, episodes and hours produced (average 2015-2023)



TV fiction production in Europe has reached a turning point – the number of titles fell across all formats.

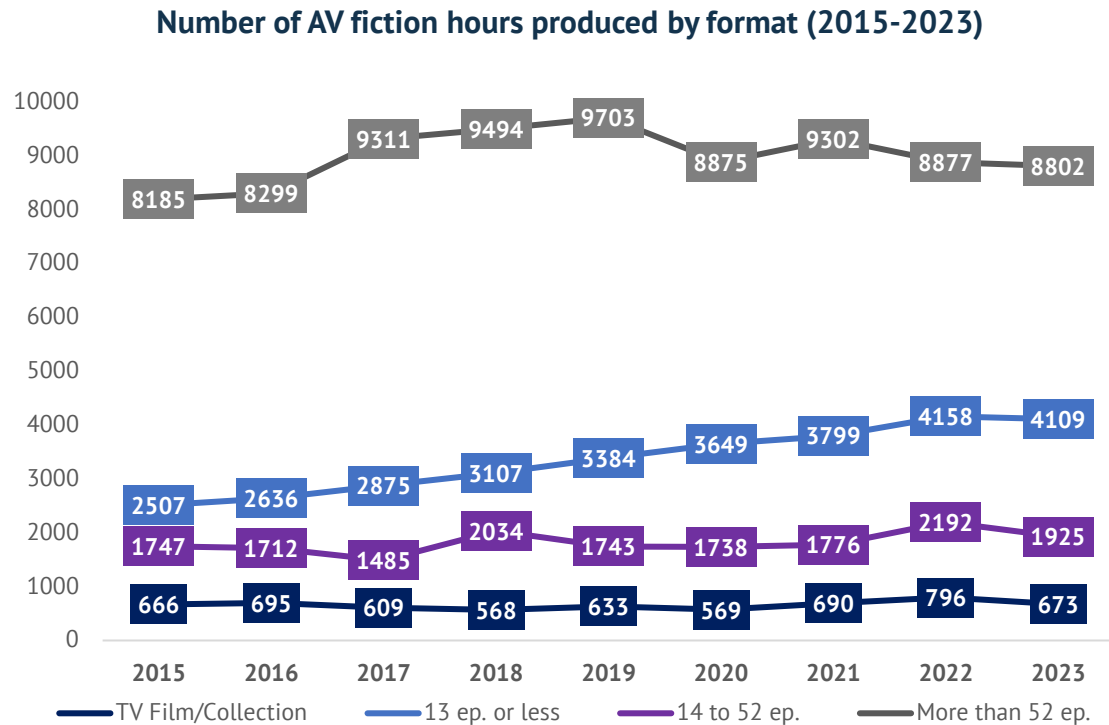
- The boom of series with 13-episodes-or-less-per-season has come to an end.
- The post-pandemic recovery did not continue to stabilise the TV fiction market.
- The downturn was the strongest among series with 14-to-52-episodes-per-season (minus sixteen percent).

Number of AV fiction titles produced by format (2015-2023)



The volume of hours of TV films produced in 2023 decreased the strongest.

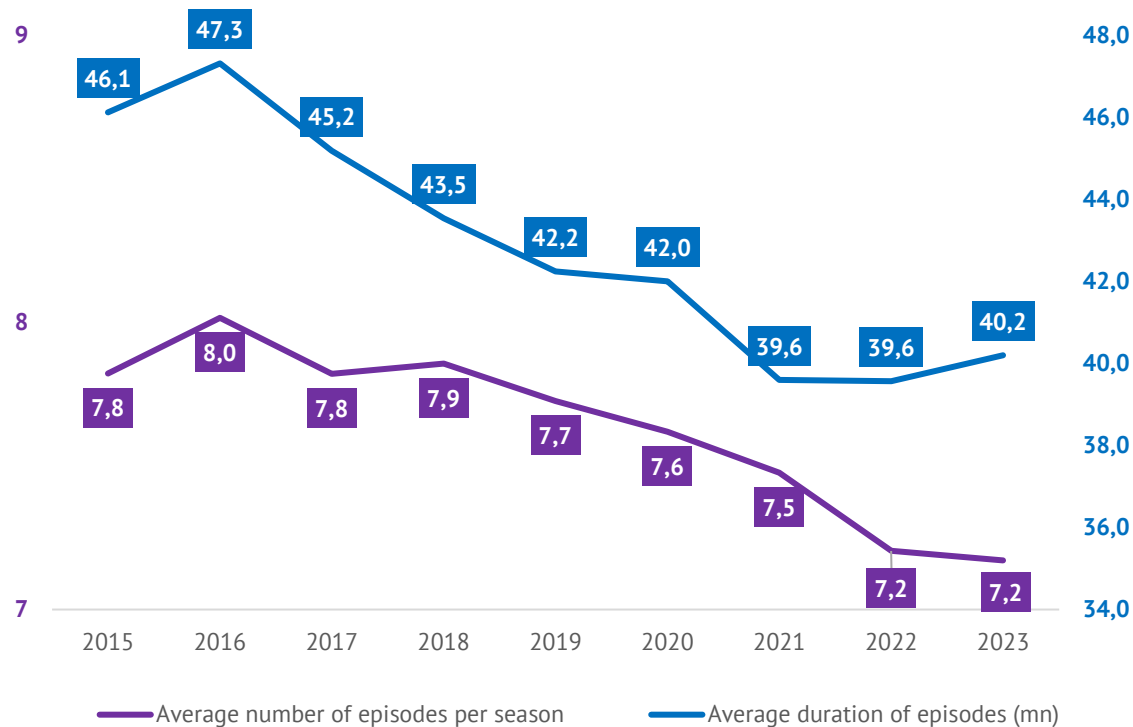
- Production hours of daily soaps/TV novellas and high-end series (13 ep. or less) produced in 2023 stagnated.
- The volume of hours of TV films and series with 14-to-52-episodes-per-season contracted by more than minus ten percent compared to the year before.



Series with 13-episodes-or-less-per-season have fewer and shorter episodes.

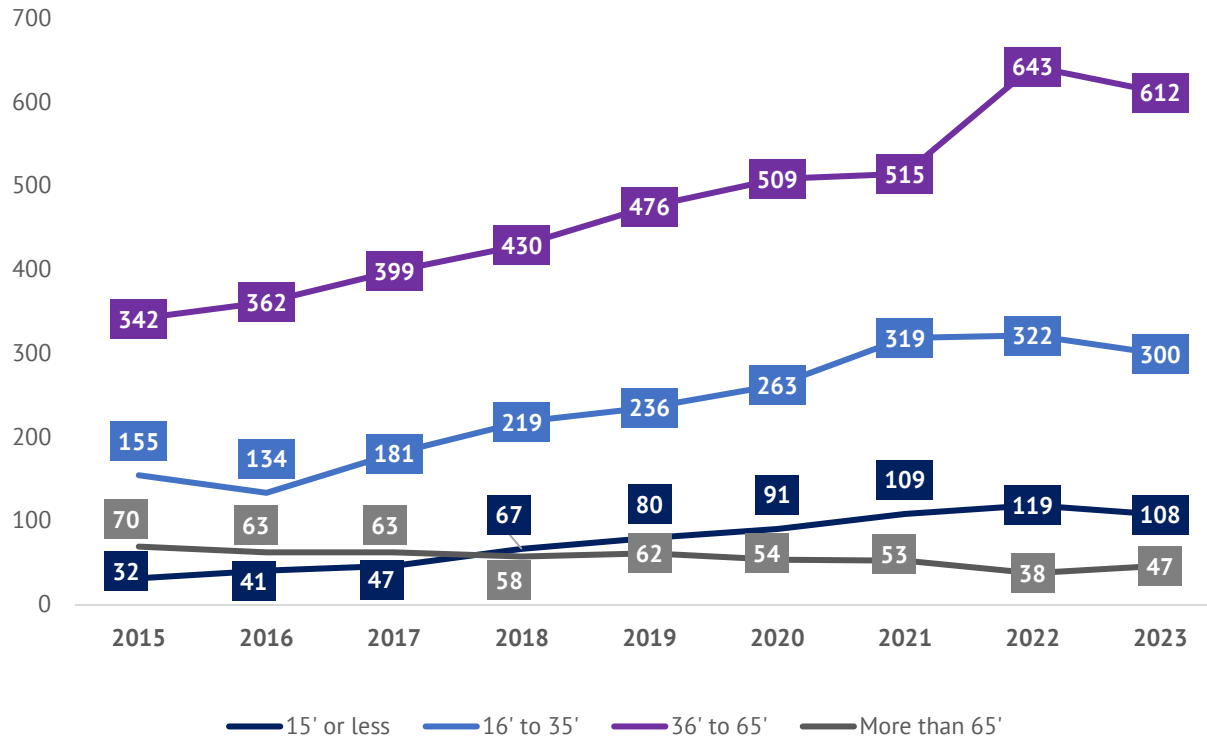
- The contrast between the number of seasons and slow growth in hours results from a decreasing average number of episodes per season.
- The duration of episodes has also decreased over the past years.

Series with 13-episodes-or-less-per-season: average number of episodes per season and duration of episodes (2015-2023)



The episode duration of most TV series produced is longer than 16 minutes, typically 36 to 65 minutes.

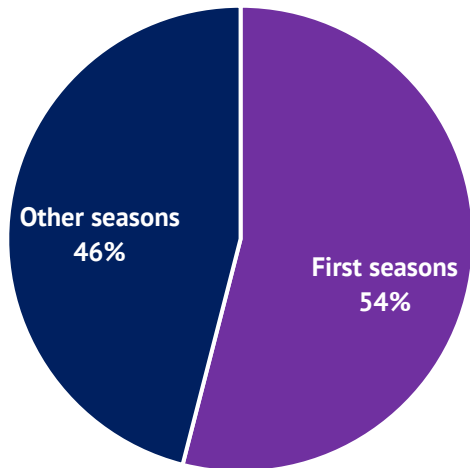
Number of fiction titles by duration of episodes (excl. TV films and collections), 2015-2023



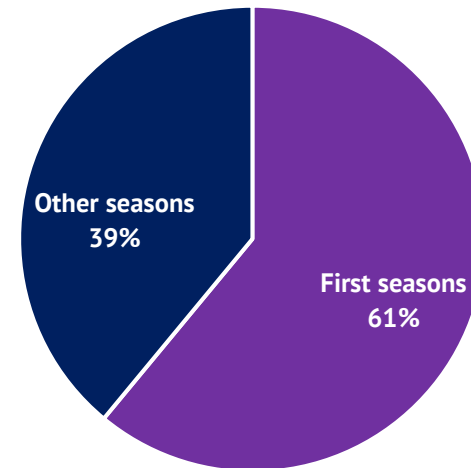
Less than half of series seasons are returning series (i.e., new seasons of existing programmes).

- The proportion of first seasons is higher (61%) for series with 13-episodes-or-less-per-season.
- However, the figures include ‘mini-series’ designed, from the outset, to last one season only.

Share of first seasons among all series
(average 2015-2023)



Share of first seasons among series with 13-episodes-or-less-
per-season (average 2015-2023)

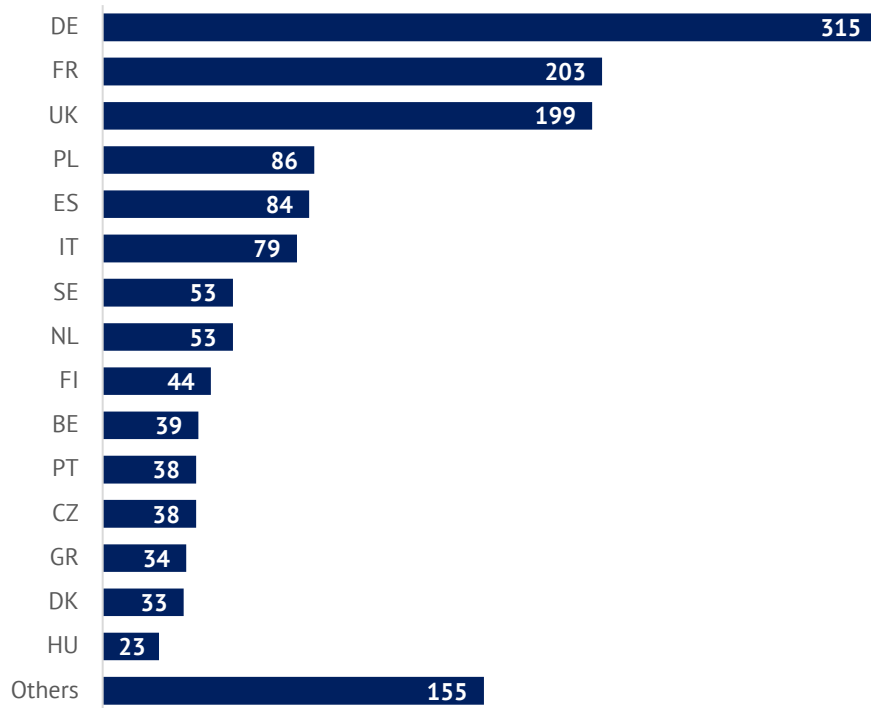


Origin of European audiovisual fiction

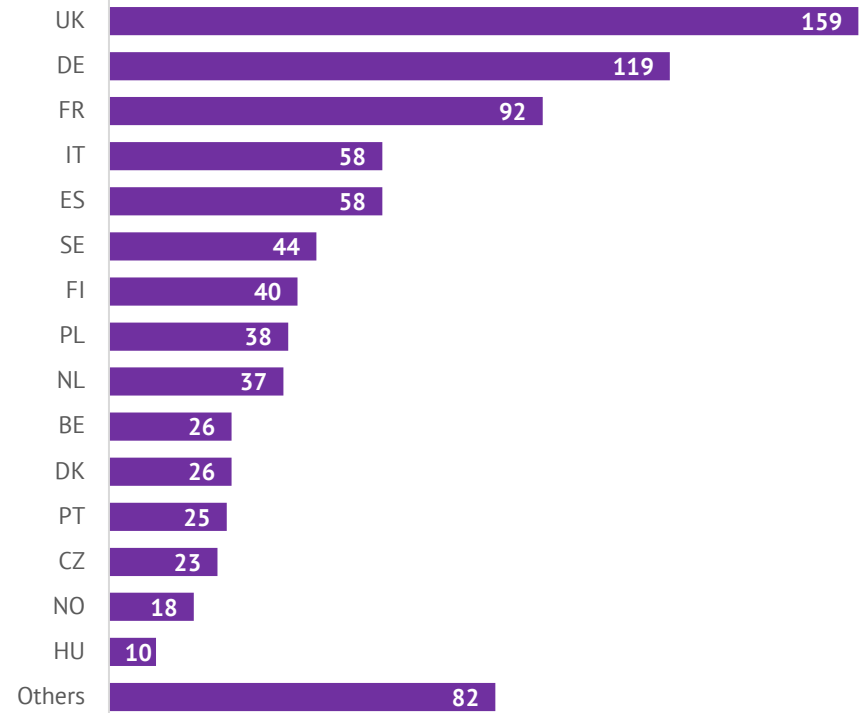
Germany is the leading fiction production country in Europe in number of TV seasons and TV films produced.

- The United Kingdom is the leading producer of series with 13-episodes-or-less-per-season.
- Four Nordic countries are in the top 15 for series with 13-episodes-or-less-per-season.

**Top fiction-production countries
in number of TV films/seasons (2023)**



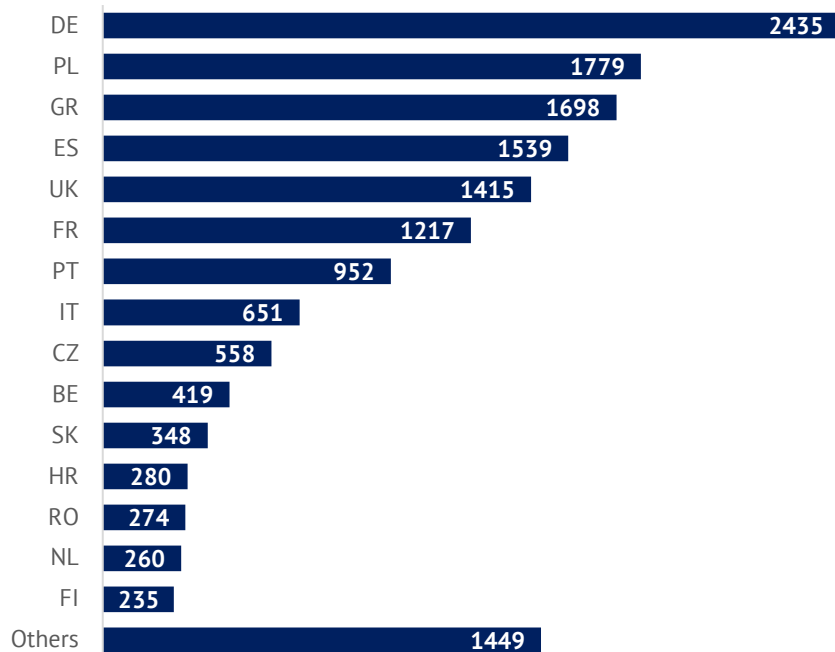
**Top series with 13-episodes-or-less-per-season-producing
countries in number of TV films/seasons (2023)**



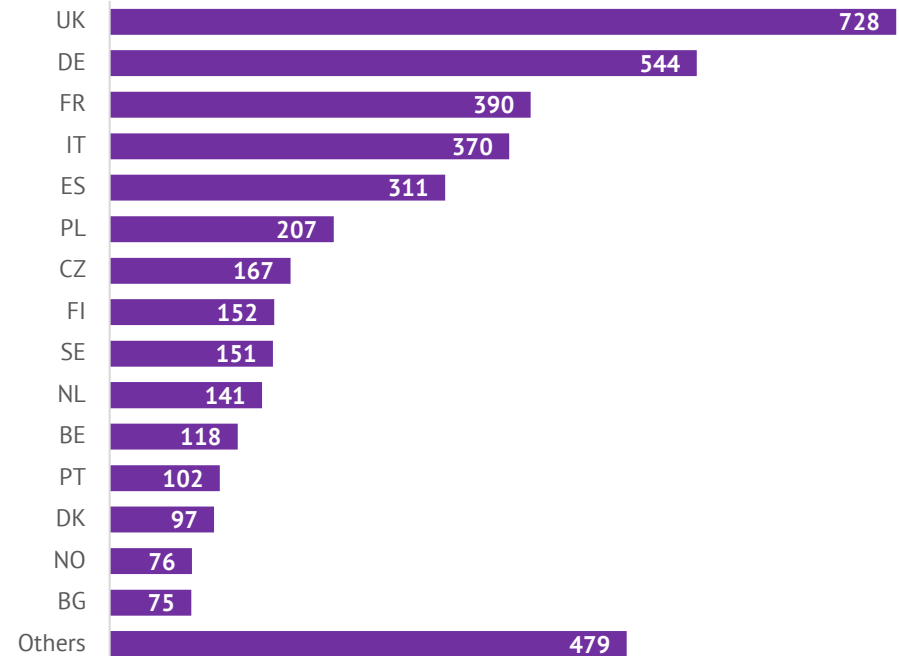
In terms of hours, Germany, Poland and Greece lead thanks to a strong production of daily telenovelas/soaps.

- Spain, the United Kingdom and France are also major producers of telenovelas and soaps.
- The five biggest markets lead the production of series with 13-episodes-or-less-per-season.

**Top fiction-producing countries
in number of hours (2023)**



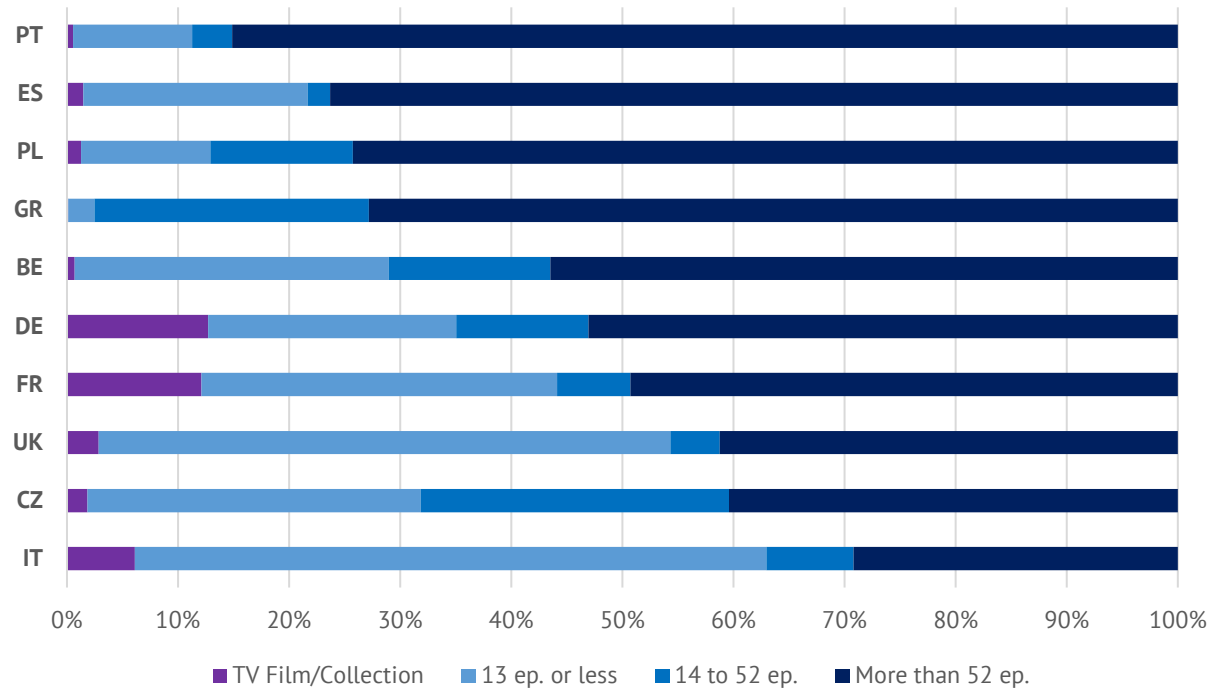
Top countries producing series with 13-episodes-or-less-per-season - in number of hours (2023)



The structure of fiction production varies between the leading countries.

- Long-running soaps are dominant in Portugal, Spain, Poland and Greece.
- Germany, France and Italy put a higher-than-average emphasis on TV films.
- Series with 13-episodes-or-less-per-season have significant weight in Italy, the United Kingdom and France.

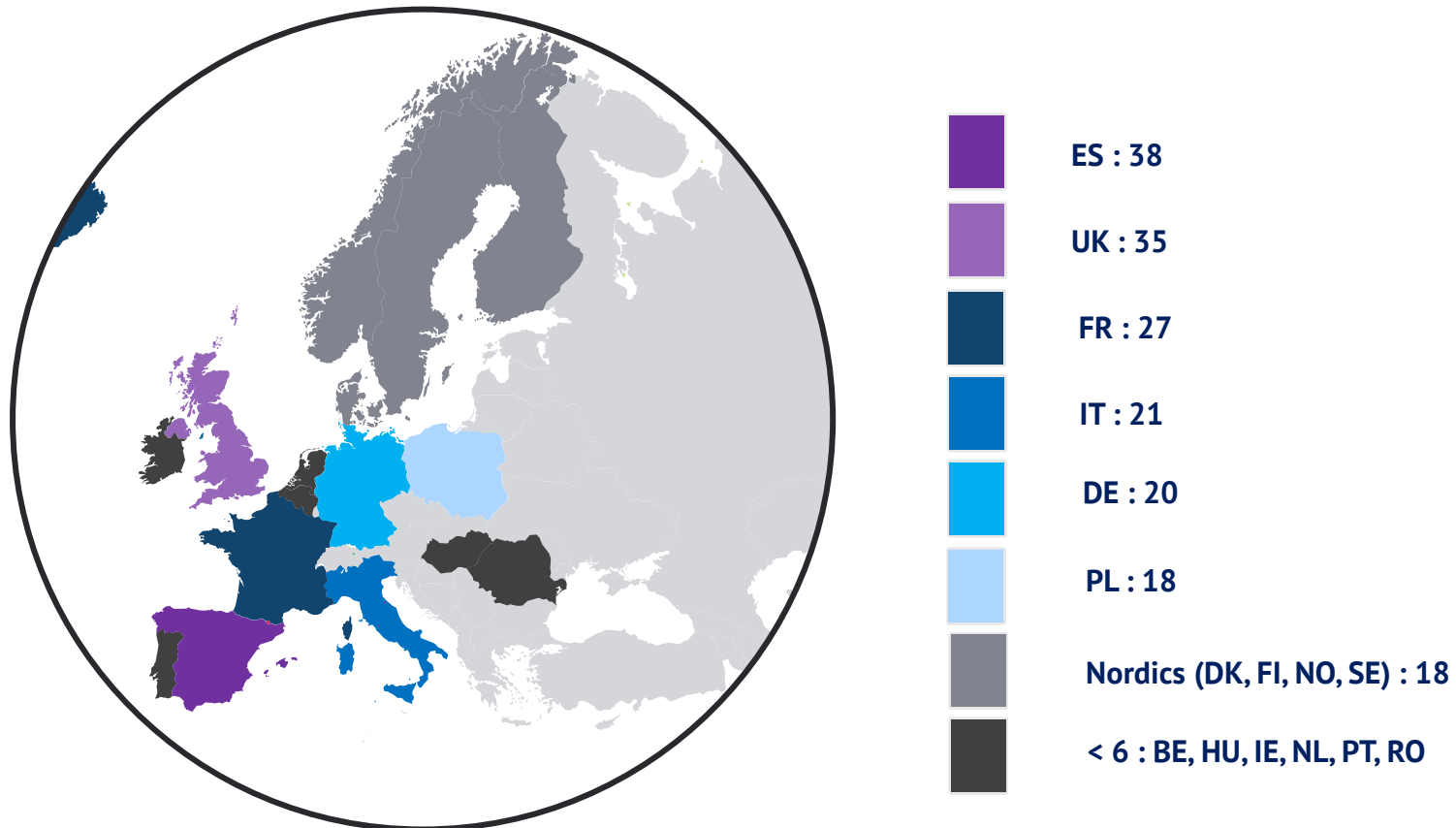
Hours of fiction produced by country and format (top 10 producing countries) in % (2023)



Global streamers have geographic preferences for production countries.

- In 2023, over one third (38%) of TV fiction commissioned by global streamers was produced in Spain and the UK. Other significant production hubs for streamers were France, Italy and Germany.

Map of production countries of fiction titles commissioned by global streamers (2023)

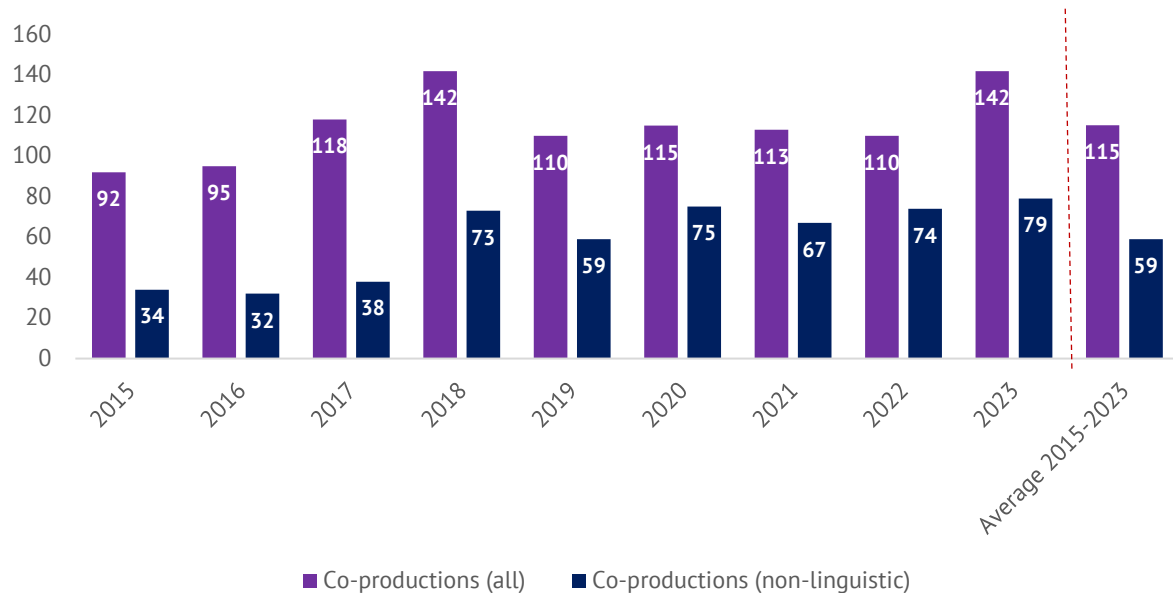


International co-productions

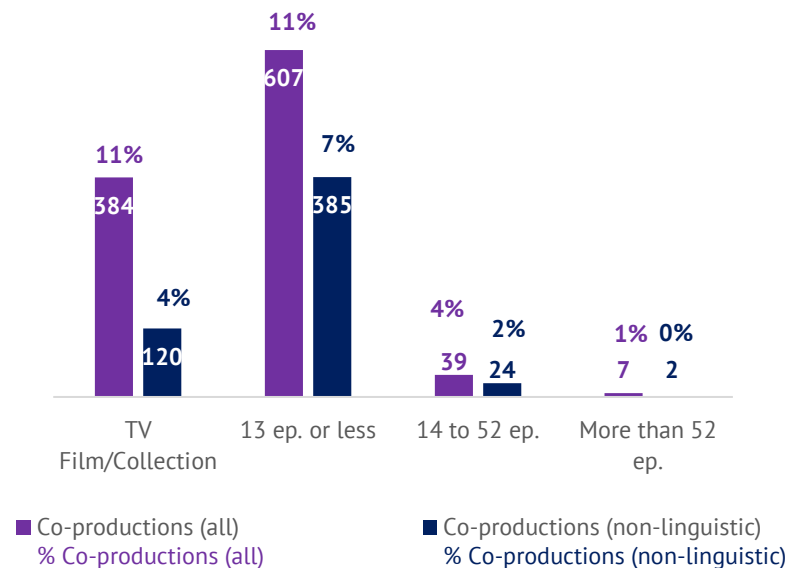
Over 100 co-productions per year, almost exclusively of series with 13-episodes-or-less-per-season and TV films.

- Co-productions made up 10% of all TV fiction titles produced in Europe in 2023.
- Co-productions accounted for 11% of series with 13-episodes-or-less-per-season between 2015 and 2023, and 7% when excluding ‘linguistic coproductions’ (co-productions between neighbouring countries sharing the same language).

Number of co-productions (2015-2023)



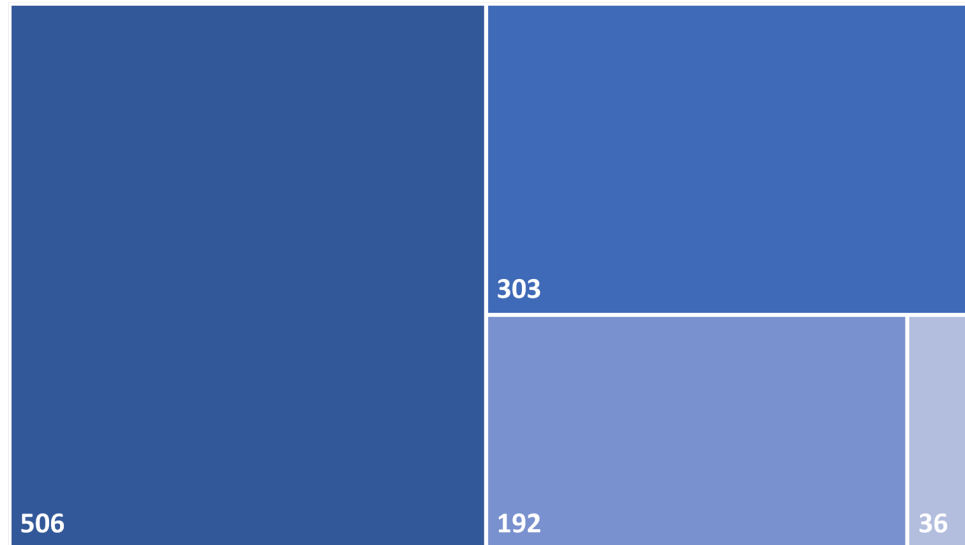
Number and share of co-productions by format (total 2015-2023)



Most non-linguistic co-productions include only European countries.

- However, around one in five link at least one European country with the United States and/or Canada.
- Excluding the United States and Canada, there are few co-productions with non-European countries.

**Breakdown of co-productions by participating regions
(total 2015-2023)**

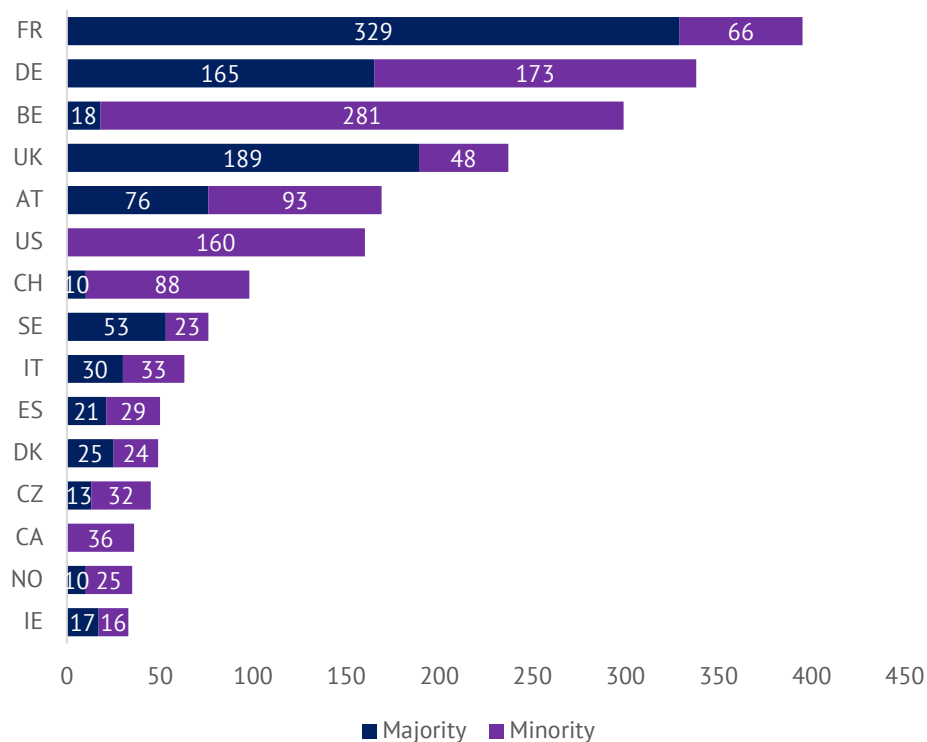


- European "linguistic" co-productions
- Only European countries (excl. "linguistic")
- Europe + USA and/or Canada
- Europe + other non-European countries and not USA or Canada

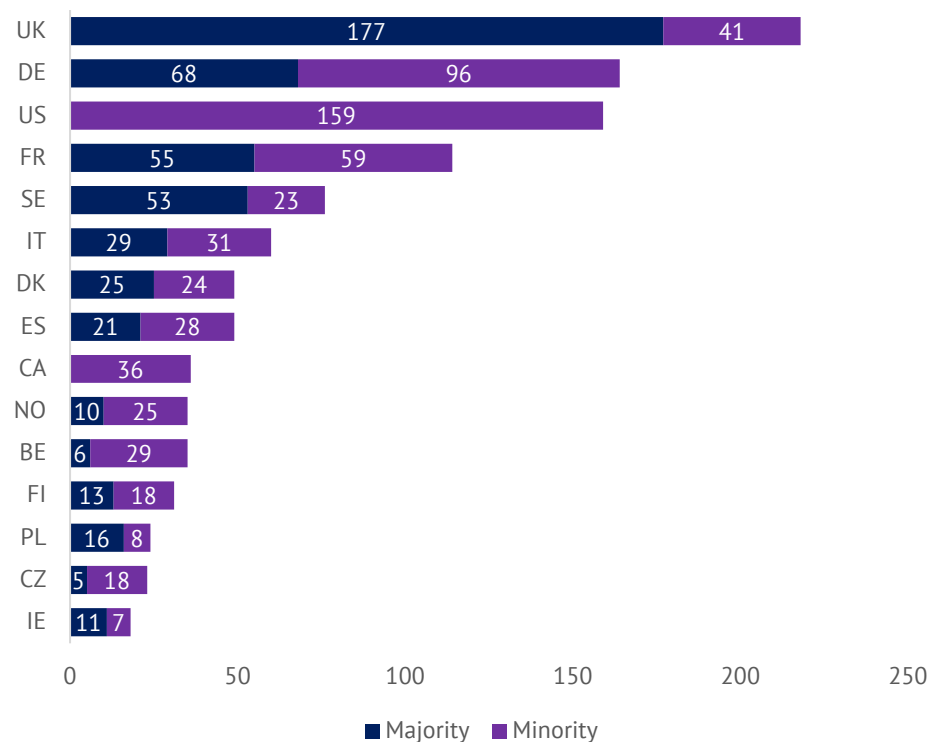
France, Germany and Belgium are involved in the highest number of co-productions.

- Belgium’s involvement is mainly as minority co-producer, in most cases with France.
- But, when excluding co-productions between neighbouring countries sharing the same language, the leaders are the United Kingdom, Germany, the United States (as minority co-producer), France and Sweden.

Number of participations in co-productions (total 2015-2023)



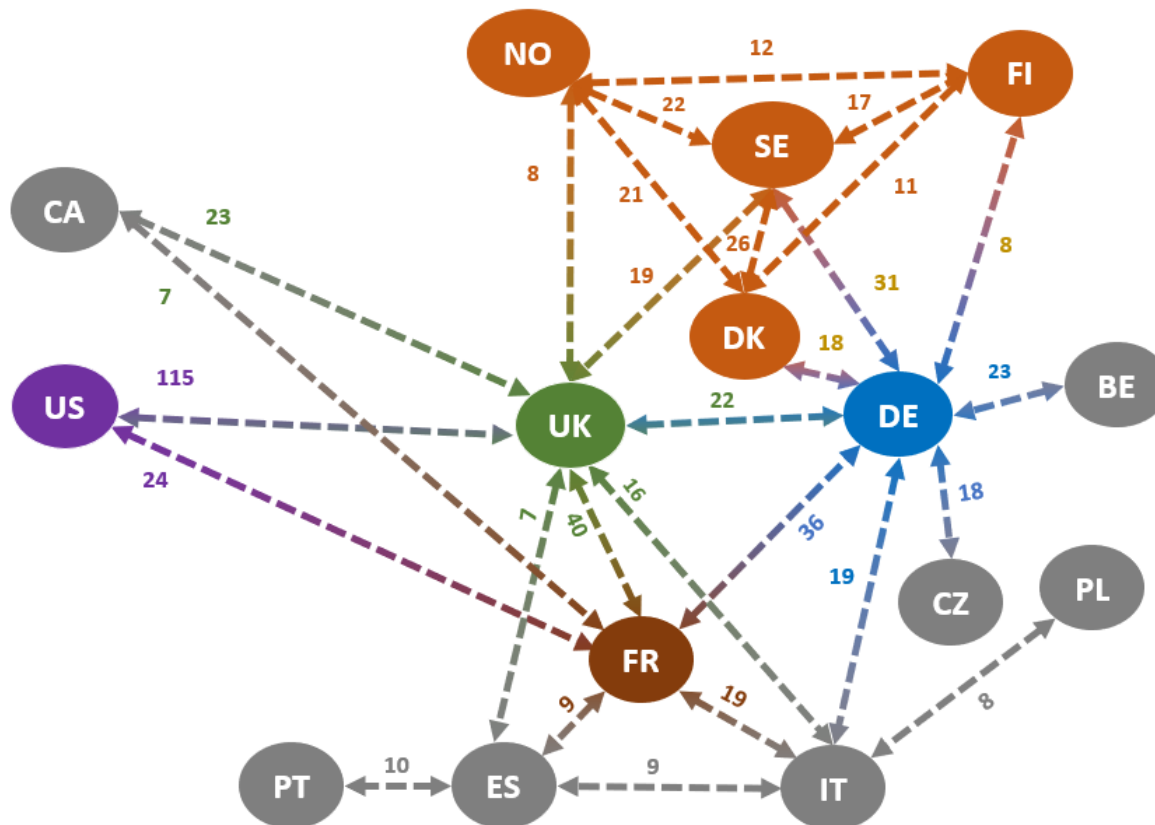
Number of participations in co-productions (excl. linguistic coprod., total 2015-2023)



The Nordic countries, the United Kingdom, France and Germany are the main co-production hubs.

- The UK primarily co-produces with the US, but also significantly co-produces with other European countries.
- The Nordic countries often co-produce with each other, but also considerably with Germany and the United Kingdom.

Number of partnerships in non-linguistic co-productions in selected countries (2015-2023)



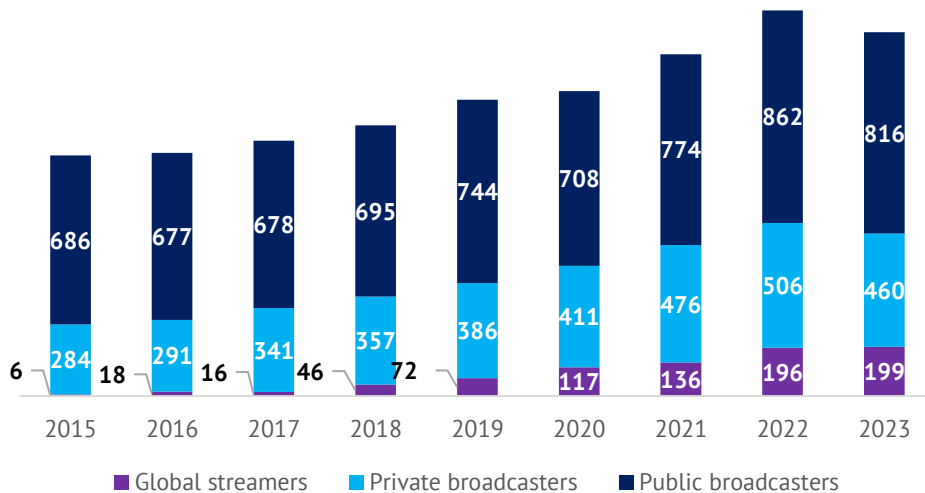
Important note: the number of partnerships differs from the number of projects. Denmark may have participated with Sweden and with Norway in the same projects.

Commissioners of European audiovisual fiction

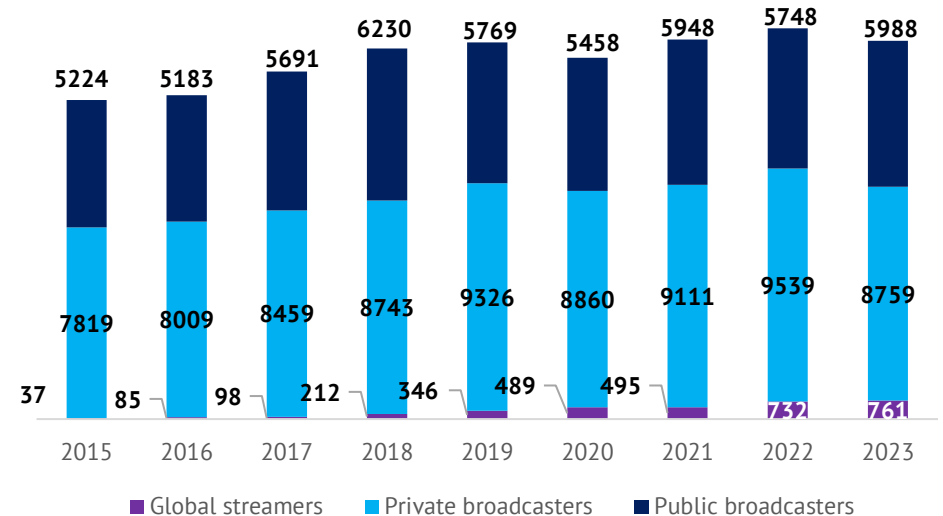
Public service broadcasters commission 55% of titles and 39% of hours.

- Conversely, private broadcasters commission 31% of titles and 57% of hours. Indeed, private broadcasters tend to dedicate a higher share of their commissioning to daily soaps/telenovelas.
- Global streamers account for 14% of titles but 5% of hours, as they do not invest in soaps/telenovelas.

Fiction titles commissioned by category of players (2015-2023)



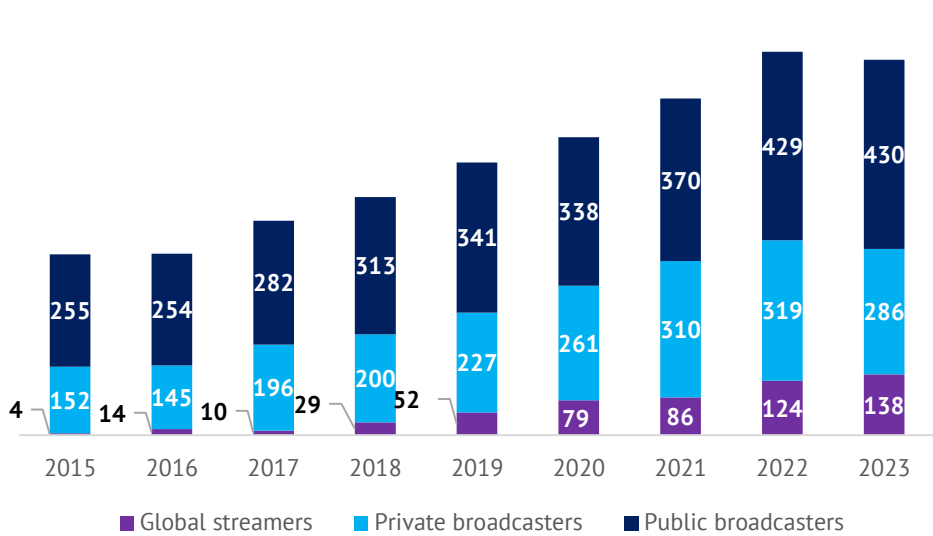
Fiction hours commissioned by category of players (2015-2023)



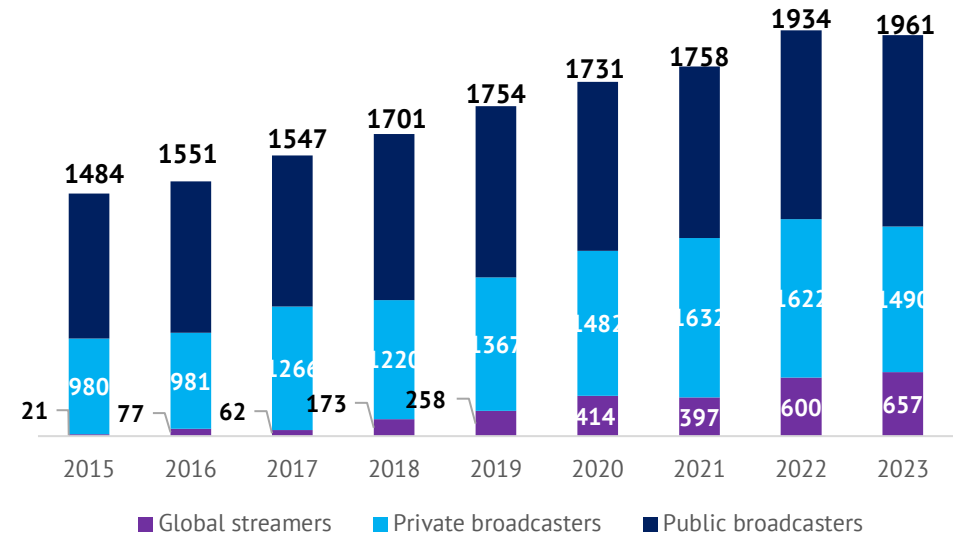
The picture is quite different when looking at series with 13-episodes-or-less-per-season.

- The share of public broadcasters in the commissioning of series with 13-episodes-or-less-per-season has decreased since 2015.
- The global streamers' share was at 16% in 2023, slightly up from 14% the year before.

Series with 13-episodes-or-less-per-season commissioned by category of players (2015-2023)



Series with 13-episodes-or-less-per-season hours commissioned by category of players (2015-2023)



Source: European Audiovisual Observatory analysis of media-press.tv data

The BBC, Netflix and Amazon led the commissioning of series with 13-episodes-or-less-per-season in 2023.

Top 20 commissioners of series with 13-episodes-or-less-per-season titles (2023)

Rank	Group (country of origin)	#Titles
1	BBC (UK)	60
1	Netflix (US)	60
2	Amazon (US)	37
3	ZDF (DE)	36
4	ARD (DE)	33
5	NPO (NL)	30
6	Comcast (US)	25
7	RTBF (BE)	24
8	Sveriges Television (SVT) Group (SE)	24
9	RTL Group (LU) / Bertelsmann (DE)	23
10	RAI (IT)	23
11	ITV (UK)	22
12	Paramount (US)	19
13	YLE (FI)	18
14	SRG-SSR (CH)	18
15	France Télévisions (FR)	17
16	PPF Group (CZ)	17
17	Telia Company (SE)	16
18	Warner Bros. Discovery (US)	16
19	ORF (AT)	15

Important note: these figures are indicative as each title is attributed to only one broadcaster, even in the case of co-productions involving several broadcasters.

Producers of European audiovisual fiction

In this section, independent productions include a) those from production groups non-affiliated with a major broadcaster, and b) those affiliated with a major broadcaster – but produced for another broadcaster.

- Production by independent producers accounted for over 70% of titles (both for all formats and for series with 13-episodes-or-less-per-season). Other independent productions by broadcasters working for third-party broadcasters accounted for 9% and 11% of titles for all formats and for series with 13-episodes-or-less-per-season, respectively.
- Please note that the actual control of IP rights is not taken into account.

**Breakdown of production by category of producer
(all fiction - 2023)**



**Breakdown of production by category of producer
(series with 13-episodes-or-less-per-season - 2023)**



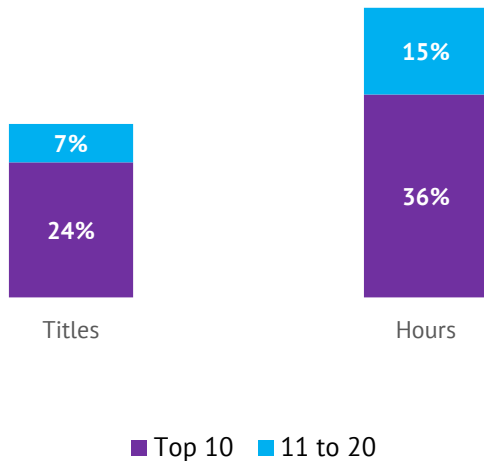
- Affiliated production group for affiliated broadcaster (dependent)
- Affiliated production group for non-affiliated broadcaster (independent)
- Non-affiliated production group (independent)

- Affiliated production group for affiliated broadcaster (dependent)
- Affiliated production group for non-affiliated broadcaster (independent)
- Non-affiliated production group (independent)

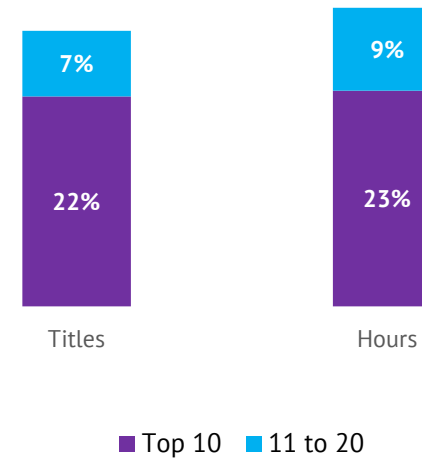
The top 20 producers account for 31% of titles and 52% of hours.

- The concentration in hours is strongly influenced by the production of telenovelas/soaps (comparatively few titles, each comprising many hours).
- The concentration is similar in terms of titles for series with 13-episodes-or-less-per-season (29%), but lower in terms of hours (32%).

Share of the top 20 producers out of total production
(all fiction, 2023)



Share of the top 20 producers out of total production
(series with 13-episodes-or-less-per-season, 2023)



The top producers of TV fiction titles in 2023 were the ARD, Banijay Group, ZDF and the Mediawan-Leonine Alliance.

- The Banijay Group, the Mediawan-Leonine Alliance and the RTL Group were the three main producers of independent TV fiction.
- The Banijay Group, the RTL Group and ITV had the most geographically diverse selection of production countries.

Top 10 producers (2023) by...

Number of titles produced

Rank	Group	#Titles
1	ARD (DE)	59
2	Banijay Group (FR)	52
3	ZDF (DE)	41
4	Mediawan+Leonine / Mediawan/KKR (FR)	41
5	RTL Group (LU) / Bertelsmann (DE)	38
6	Warner Bros. Discovery (US)	33
7	ITV (UK)	31
8	TF1 / Bouygues (FR)	25
9	BBC (UK)	22
10	UMEDIA Production / UFUND (BE)	13

Number of independent titles produced

Rank	Group	#Titles
1	Banijay Group (FR)	52
2	Mediawan+Leonine / Mediawan/KKR (FR)	41
3	RTL Group (LU) / Bertelsmann (DE)	28
4	Warner Bros. Discovery (US)	26
5	TF1 / Bouygues (FR)	23
6	ITV (UK)	21
7	UMEDIA Production / UFUND Highlight Communications	13
8	(CH)	11
9	Gaumont (FR)	11
10	Asacha Media Group (FR) / Oaktree Capital (KY)	10

Number of different countries of production

Rank	Group	#Countries
1	Banijay Group (FR)	11
2	RTL Group (LU) / Bertelsmann (DE)	10
3	ITV (UK)	8
4	TF1 / Bouygues (FR)	6
5	Viaplay Group (CZ)	6
6	Warner Bros. Discovery (US)	6
7	Beta Film (DE)	5
8	Groupe Canal Plus / Vivendi (FR)	5
9	Mediawan+Leonine / Mediawan/KKR (FR)	4
10	PPF Group (CZ)	4

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Origin of European audiovisual fiction

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