



Audiovisual fiction production in Europe 2021 figures

Gilles Fontaine
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Introduction and methodology

This report provides an analysis of the production of audiovisual fiction in Europe in the period 2015-2021(*). 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 the European Metadata Group. The European Metadata Group 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 the European Metadata Group were complemented by the European Audiovisual Observatory.
- Other sources used for this report include IMDb, to identify the screenwriters and directors of European fiction, and the Observatoty LUMIERE database, to identify the audiovisual fiction directors also active in theatrical films.

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 + Switzerland + Iceland

- Titles have been broken down by **format**: TV films/collections, 13-episode-or-fewer-per-season series, 14-to-52-episode-per-season series, and more-than-52-episode-per-season series. 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).
- 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 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, FR-BE, FR-CH, GR-CY, BE-NL, DE-CH, CZ-SK, GB-IE).
- In this report, "**independent production**" is defined as an AV fiction 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 + Switzerland + Iceland.

Please quote this report as: "Audiovisual fiction production in Europe – 2020 figures", European Audiovisual Observatory.

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Key findings

The 2020/2021 COVID-19 crisis halted the growth of the production and release of original TV fiction

- After years of growth, the volume of hours produced was still in 2021 slightly below its 2019 level.
- However, the number of 13-or-fewer-episode-per-season series kept on growing throughout the crisis, but the growth did not translate into volume of hours as seasons had less and shorter episodes (probably as a way to cope with the increase in budgets).
- The production of TV films rebounded in 2022 after several years of decline.

COVID-19 did not affect some of the fundamental characteristics of TV production in Europe

- Telenovelas/soaps account for the bulk (61%) of hours produced.
- More than half of all titles produced are 13-or-fewer-episodes-per-season series.

The production mix varies deeply between countries

- With large volumes of telenovelas/soaps produced each year, Germany, Poland and Greece are the leaders in volume of hours produced. Hungary and Portugal are two other examples of countries driven by more-than-52-episode-per-season series.
- Germany produces the highest number of different titles, in particular with more focus than the average country on TV films.
- When focusing on shorter seasons (13 episodes or less), the UK is by far the main producer, ahead of Germany, France, Spain and Sweden.

After a peak in 2018, fewer international co-productions

- International co-productions account for 8% of all fiction titles and are mostly limited to TV films and to 2-to-3-episode-season series.
- The majority of international co-productions used to be between two neighbouring countries sharing the same language (e.g. France and Belgium; Germany and Austria). But non-linguistic co-productions have gradually increased and represent close to 60% of all co-productions.
- Non-linguistic co-productions are driven by: the United Kingdom (mainly as a majority co-producer, often with the United States but also with Canada and France); Germany (often as a minority co-producer and often with Scandinavian countries); projects between two or more Scandinavian countries. Spain, despite the recent production boom, has relatively few co-productions, maybe because of the weight of the global streamers in new fiction projects (Spain ranks second – after the United Kingdom – in number of fiction projects commissioned by the global streamers).

Public broadcasters account for 55% of titles, private broadcasters for 59% of hours

- In a market constrained by COVID-19, global streamers released 115 original European series in 2021 (all formats), vs. 112 in 2020, with about 75% commissioned by Netflix.
- BBC, Netflix and Warner Bros. Discovery were the three main commissioners of 13-or-fewer-episode-per-season series.

Production groups: Huge turnover, leading groups

- Almost 1 400 production companies/groups produced at least one fiction title between 2015 and 2021, but only 6% of them produced at least one title in each of the last seven years. This significant turnover can be attributed to the intense renewal of TV series: on average, between 2015 and 2021, first seasons accounted for 51% of all seasons produced each year.
- In 2021, independent productions accounted for 78% of all titles produced, with 12% from production groups affiliated with a broadcaster but working for a third-party broadcaster and 66% from production groups independent from any major broadcaster.
- Banijay, the Mediawan – Leonine Alliance and the RTL group were the three main producers of independent TV fiction.

About 13 000 screenwriters involved in the production of TV fiction between 2015 and 2021

- 47%, though, were active in just one year between 2015 and 2021, and only 5% were credited for at least one episode during each of these six years.
- On average, excluding more-than-52-episode-season series, a screenwriter (co)wrote 1.9 episodes per year.
- 73% of all episodes released between 2015 and 2021 were cowritten by at least two screenwriters. More screenwriters were credited per episode for Spanish, Polish and Portuguese TV fictions.

About 7 000 directors involved in the production of TV fiction between 2015 and 2020

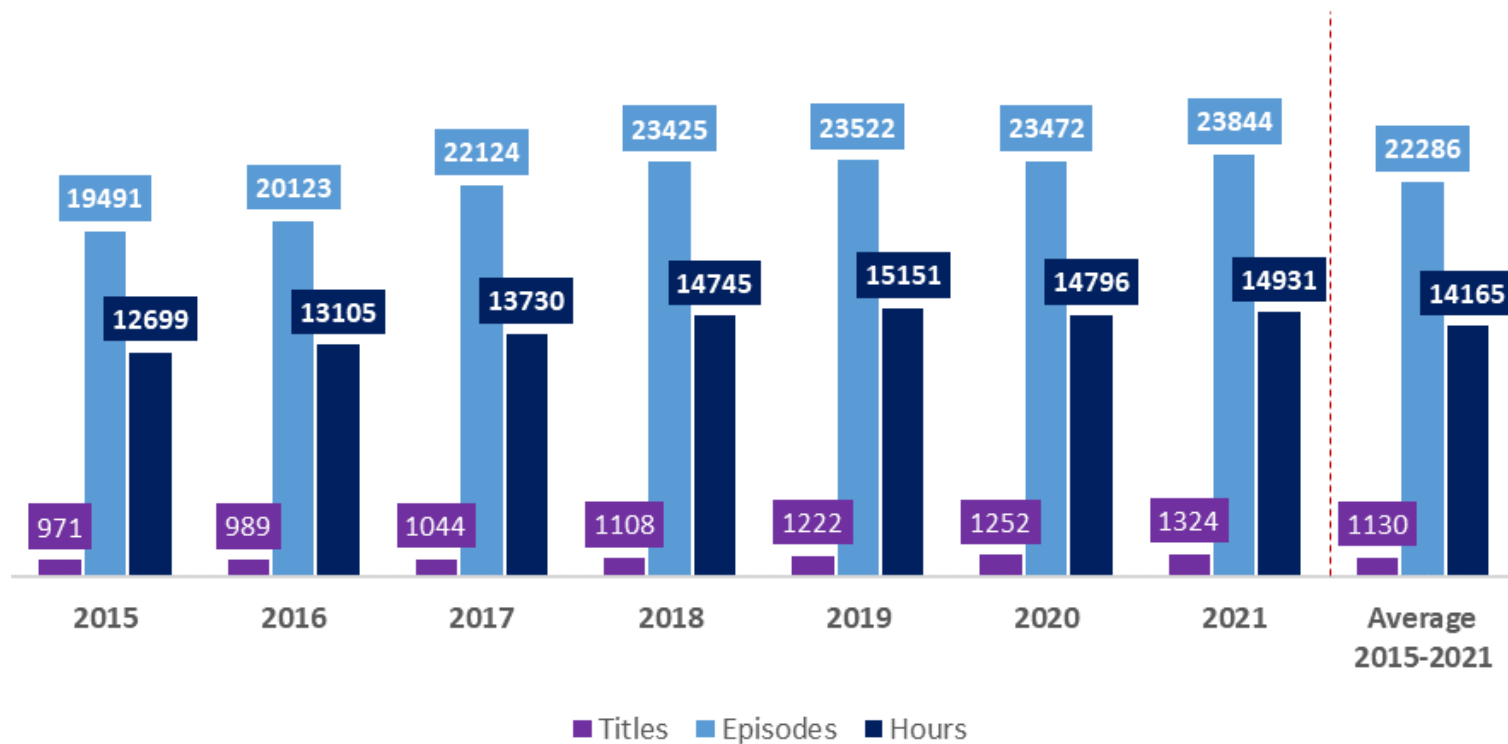
- 43%, though, were active in only one year between 2015 and 2021, and only 6% were credited for at least one episode during each of these seven years.
- Excluding more-than-52-episode-season series, a director (co)directed two episodes per year.
- 58% of TV films and fiction series directors have also directed a theatrical film at any given point in time.

Production volume and formats of European audiovisual fiction

Over 1 100 titles, 22 000 episodes and 14 000 hours produced each year in Europe

- The volume of TV fiction titles increased between 2015 and 2021.
- However, figures suggest that the production volume plateaued in 2020/2021, possibly due to the COVID-19 crisis and the delays in commissioning and production.

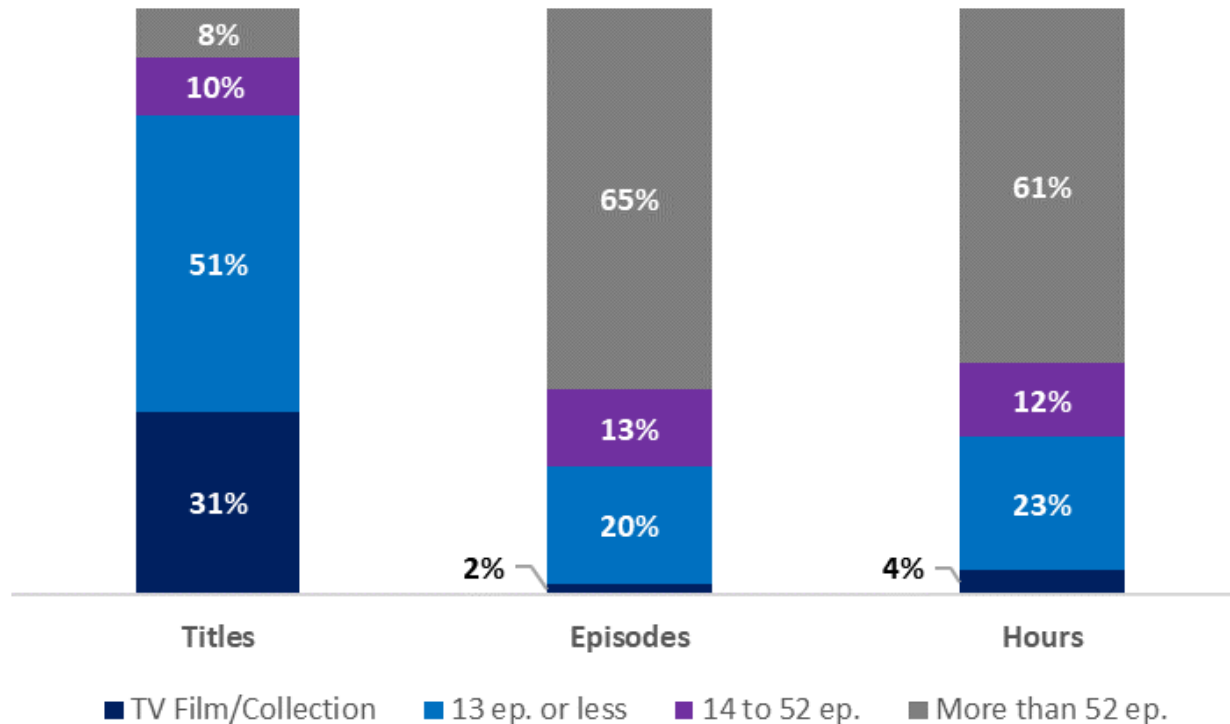
Volume of AV fiction produced in Europe (2015-2021)



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

- Conversely, TV films and collections represent 31% of titles but only 4% of hours.
- Less-than-13-episode-series seasons account for 51% of titles and 23% of hours.

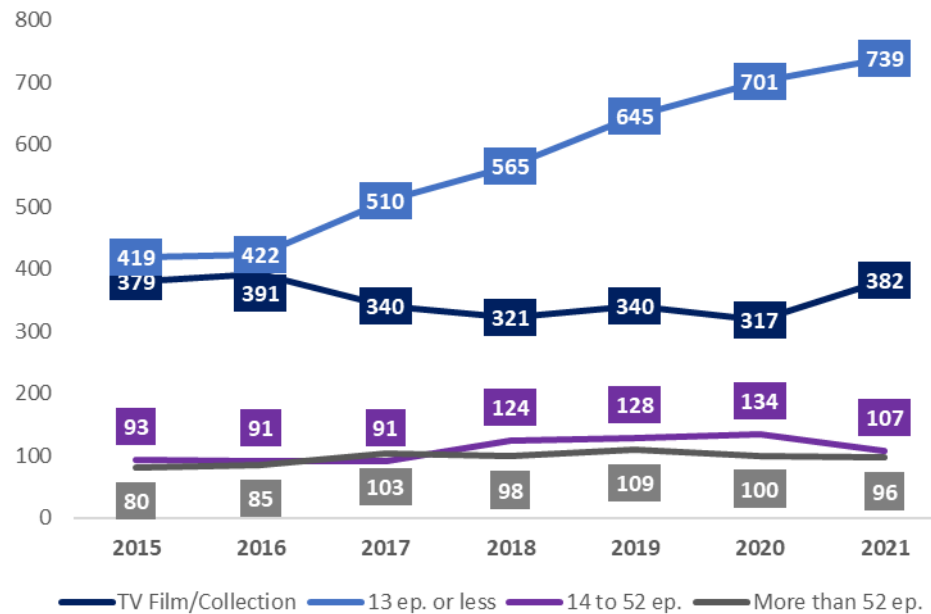
Breakdown of fiction titles, episodes and hours produced (average 2015-2021)



The number of less-than-13-episode-per-season series has grown by 76% since 2015

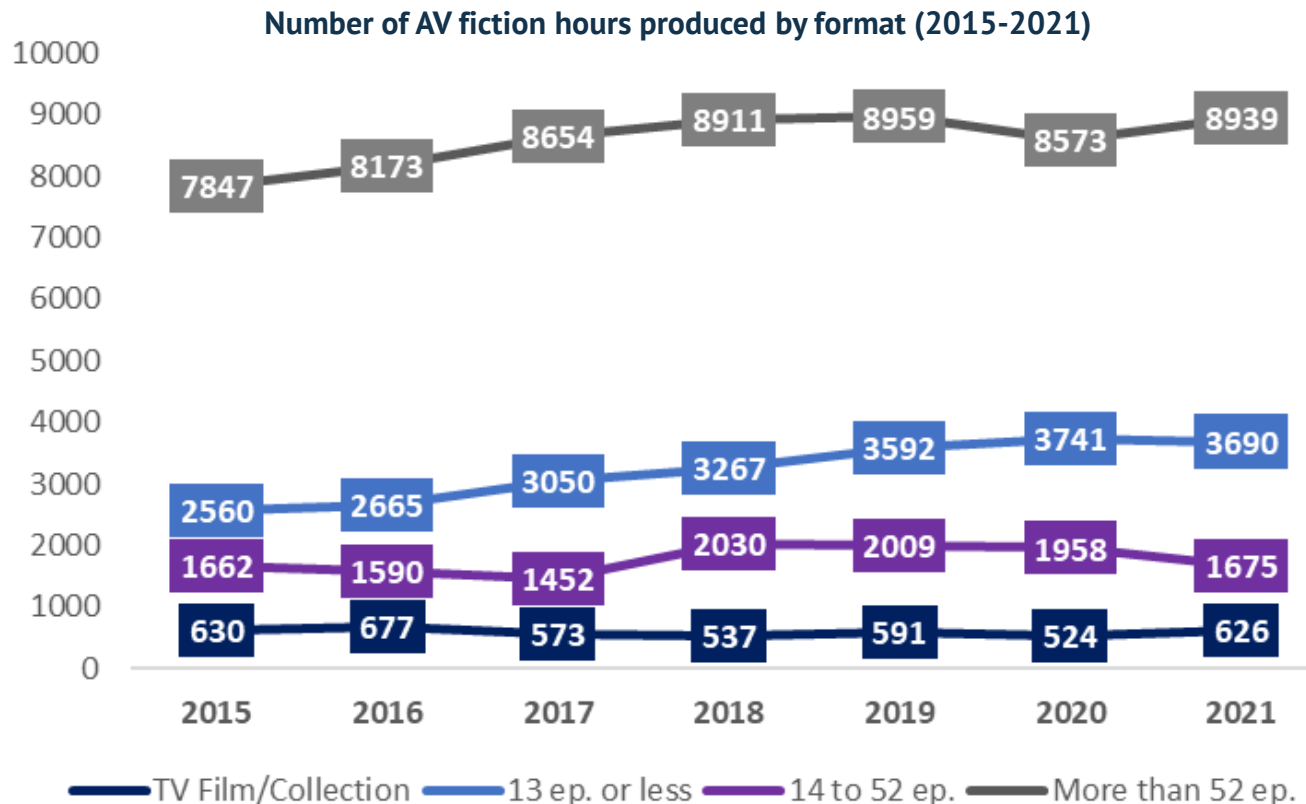
- Over 50% of titles produced in 2020 were 2-to-13-episode-per-season series.
- Despite the COVID-19 crisis, growth continued in 2020 and in 2021.
- The number of TV films produced rebounded in 2021 after years of decline.

Number of AV fiction titles produced by format (2015-2021)



The picture is quite different when looking at the volume of hours produced

- Whereas the number of hours of 2-to-13-episode-per-season series increased in 2020/2021, the volume of hours produced plateaued.
- Conversely, daily soaps/TV novelas saw in 2021 a sharp increase in volume of hours whereas the number of titles was quite stable. This was probably the result of fewer episodes being shot for a given title in 2020 due to the pandemic.

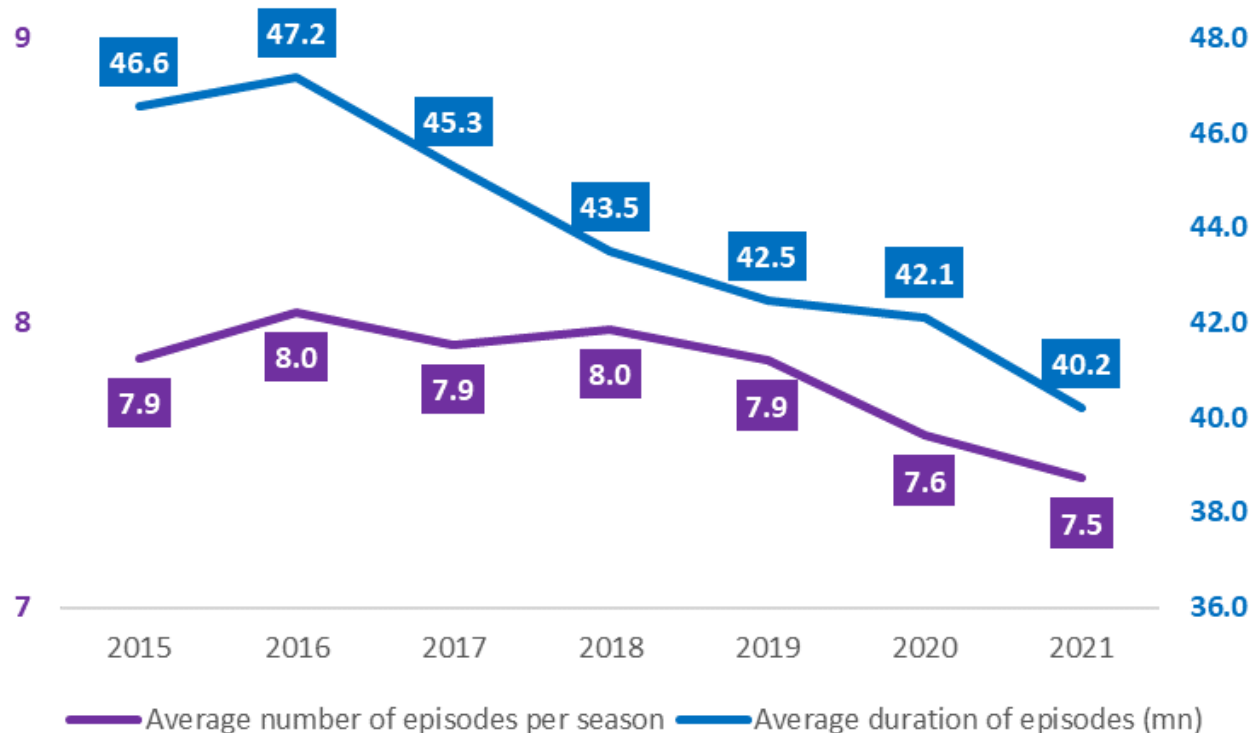


Source: European Audiovisual Observatory analysis of The European Metadata Group data

Less-than-13-episode-per-season series: Fewer and shorter episodes

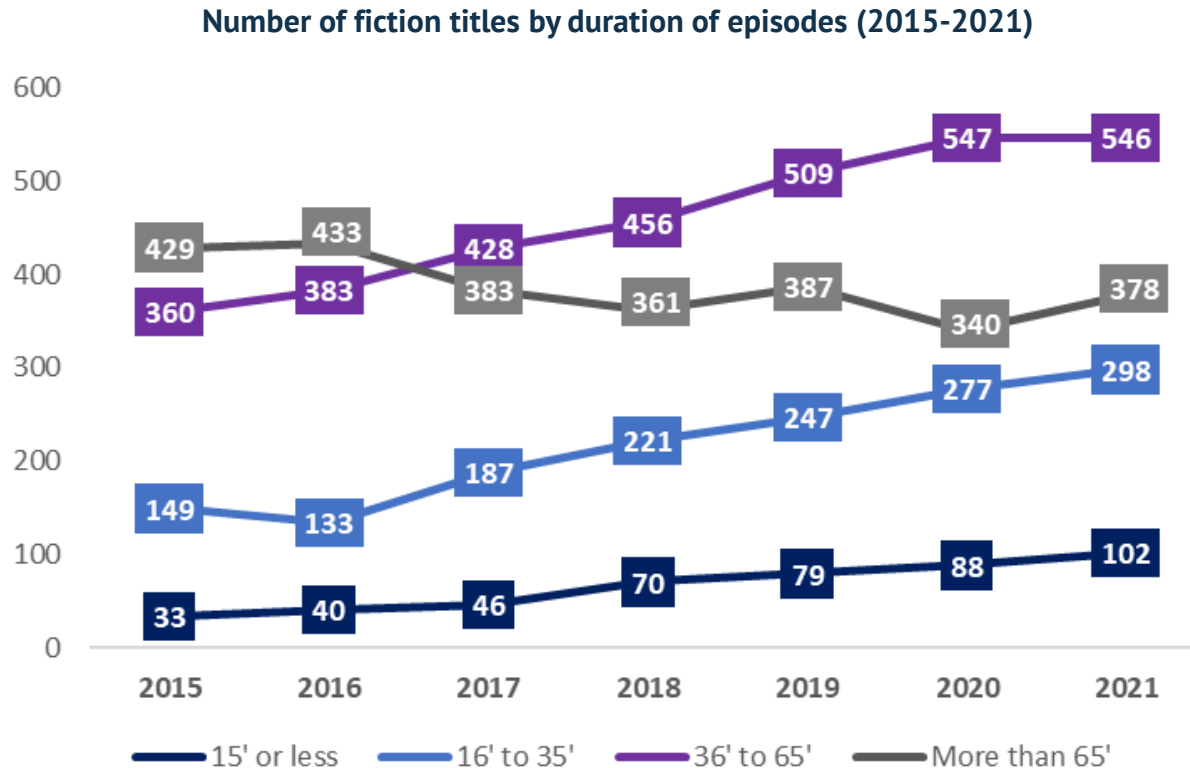
- The contrast between the increasing number of seasons and stagnating hours results from a decreasing average number of episodes per season.
- Episodes are also shorter and shorter.

Less-than-13-episode-per-season series: average number of episodes per season and duration of episodes (2015-2021)



Source: European Audiovisual Observatory analysis of The European Metadata Group data

Excepting TV films, the duration of an episode of the vast majority of TV series produced is higher than 36'

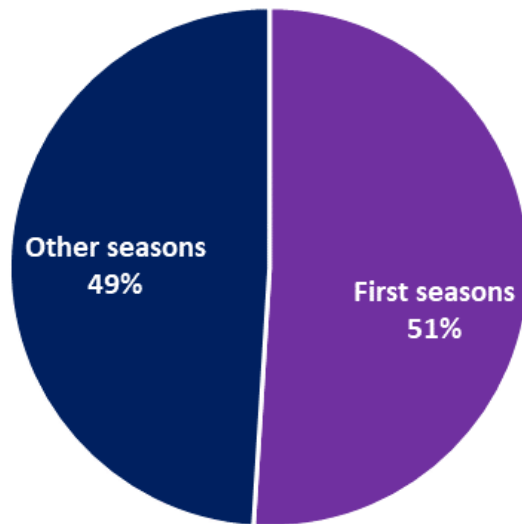


Source: European Audiovisual Observatory analysis of The European Metadata Group data

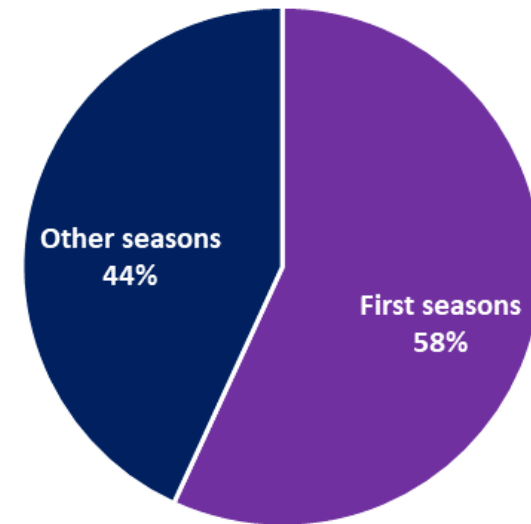
About half of series seasons are returning series (i.e. new seasons of existing programmes)

- The proportion of first seasons is higher (58%) for less-than-13-episode-per-season series.
- However, the figures include “mini-series” meant from the start to last one season.

Share of first seasons among all series
(average 2015-2021)



Share of first seasons among less-than-13-episode-per-season series (average 2015-2021)

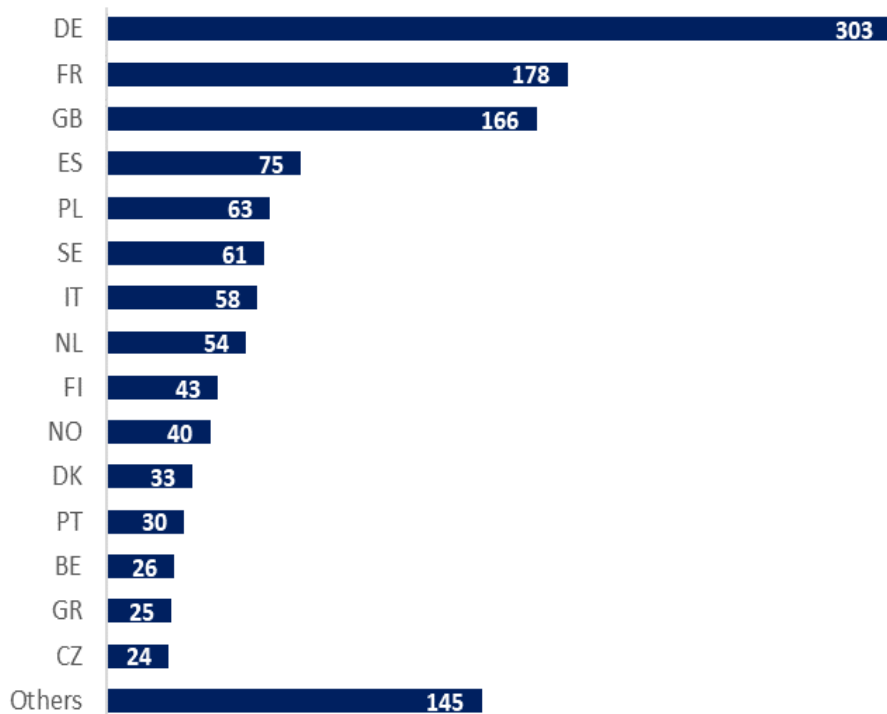


Origin of European audiovisual fiction

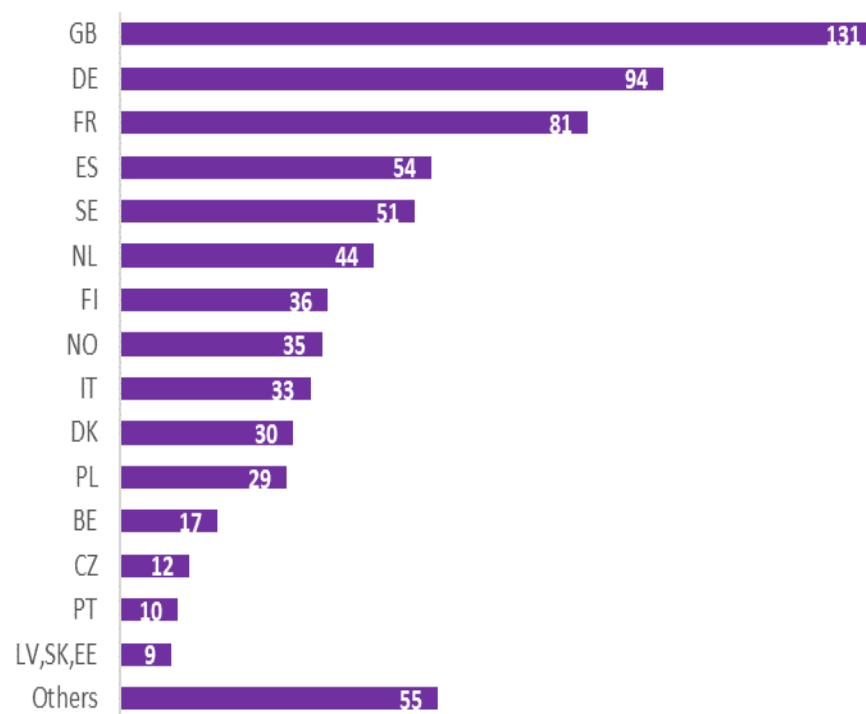
Germany is the leading fiction production country in Europe in number of TV seasons and TV films produced

- The United Kingdom is the leading producer of less-than-13-episode-per-season series.
- All three Scandinavian countries are in the top 10 for less-than-13-episode-per-season series.

**Top fiction-producing countries
in number of TV films/seasons (2021)**



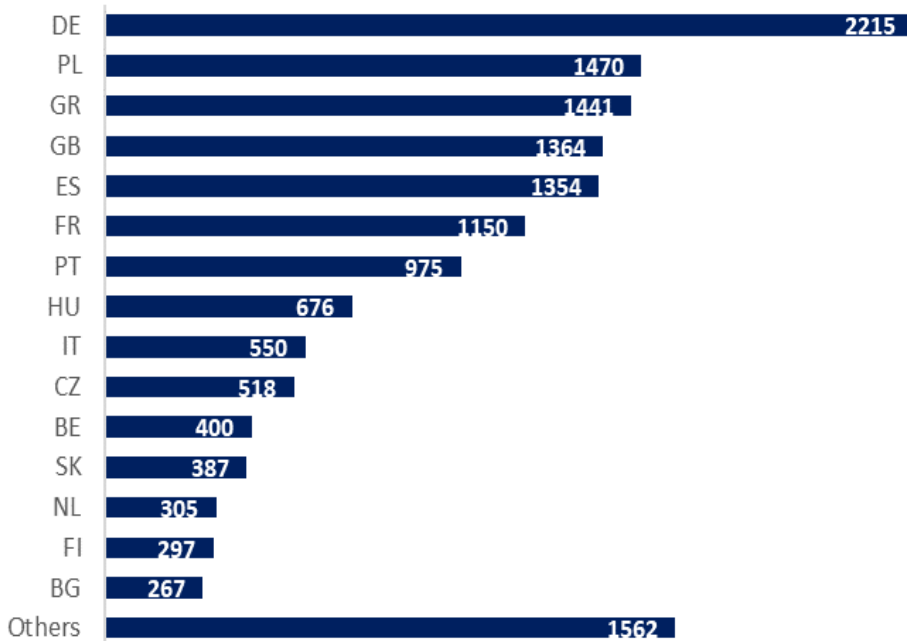
**Top less-than-13-episode-per-season series-producing
countries in number of TV films/seasons (2021)**



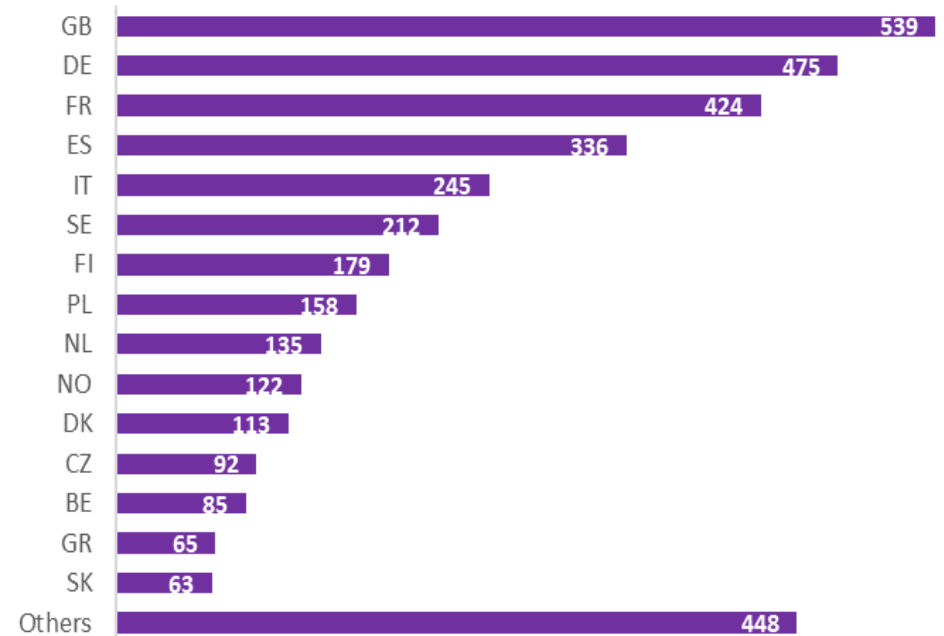
In terms of hours, Germany, Poland and Greece lead thanks to strong production of daily telenovelas/soaps

- Portugal, Hungary and the Czech Republic are also major producers of telenovelas and soaps.
- The five biggest markets lead the production of less-than-13-episode-per-season series.

**Top fiction-producing countries
in number of hours (2021)**



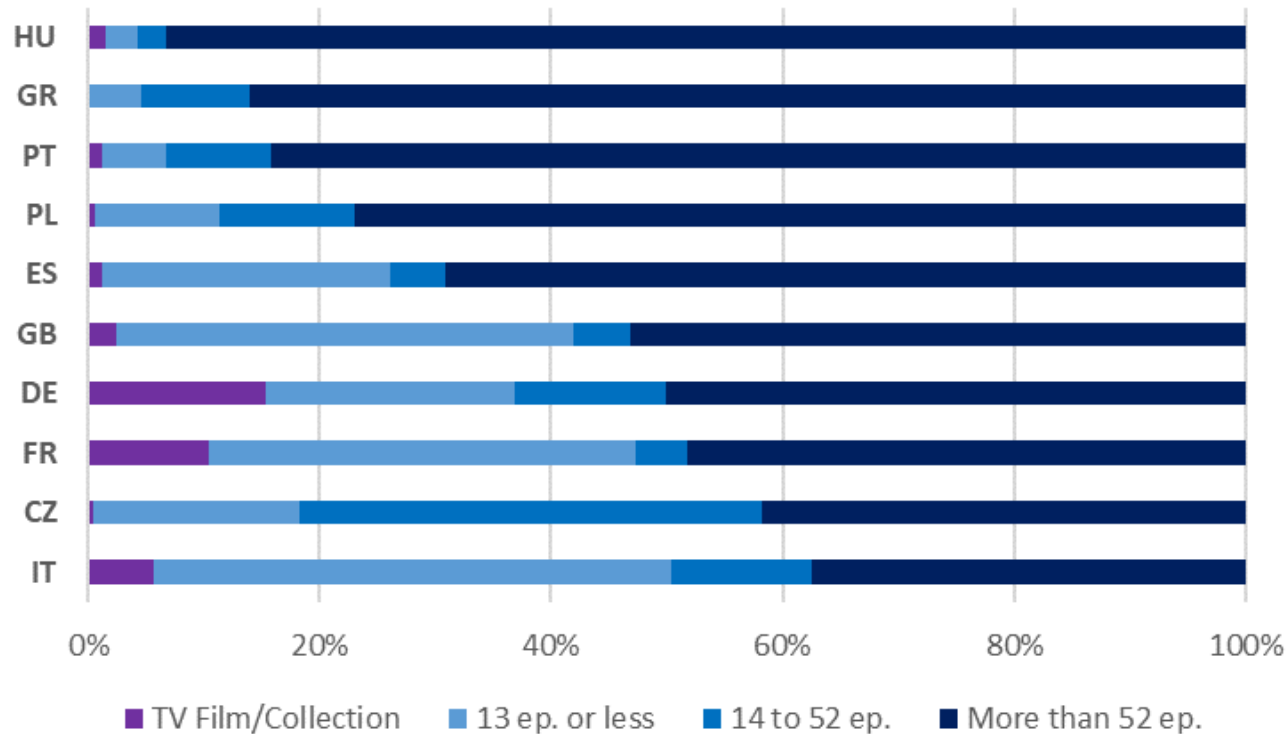
**Top less-than-13-episode-per-season series producing countries
in number of hours (2021)**



The structure of fiction production varies between the leading countries

- Long-running soaps are dominant in Hungary, Greece, Portugal and Poland.
- Germany, France and Italy put a higher-than-average emphasis on TV films.
- Italy, France and the United Kingdom have a specific interest in less-than-13-episode-per-season series.

Hours of fiction produced by country and format (top 10 producing countries)
in % (2021)



International co-productions

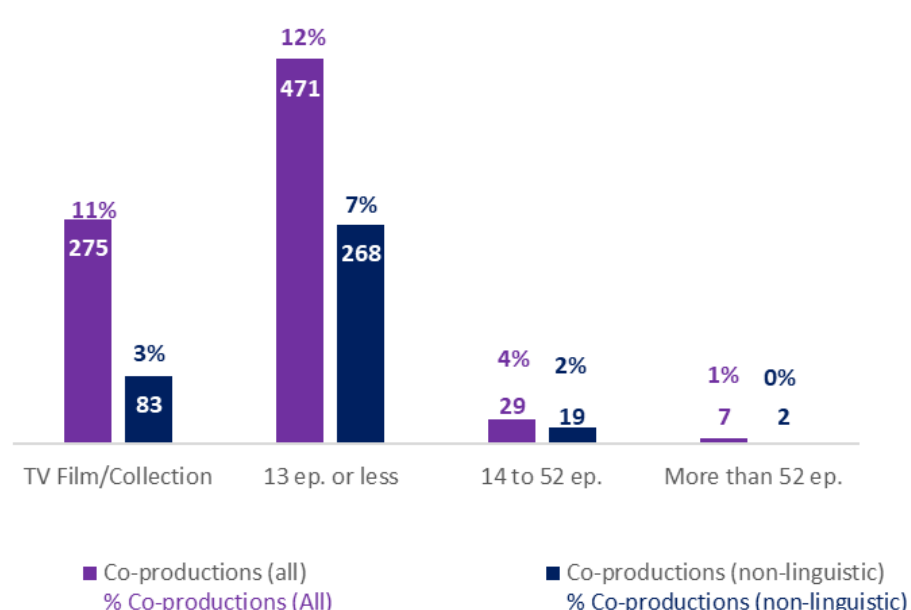
Over 100 co-productions per year, almost exclusively for TV films and less-than-13-episode-per-season series

- Co-productions accounted for 12% of less-than-13-episode-per-season series between 2015 and 2021, and 7% when excluding co-productions between neighbouring countries sharing the same language.

Number of co-productions (2015-2021)



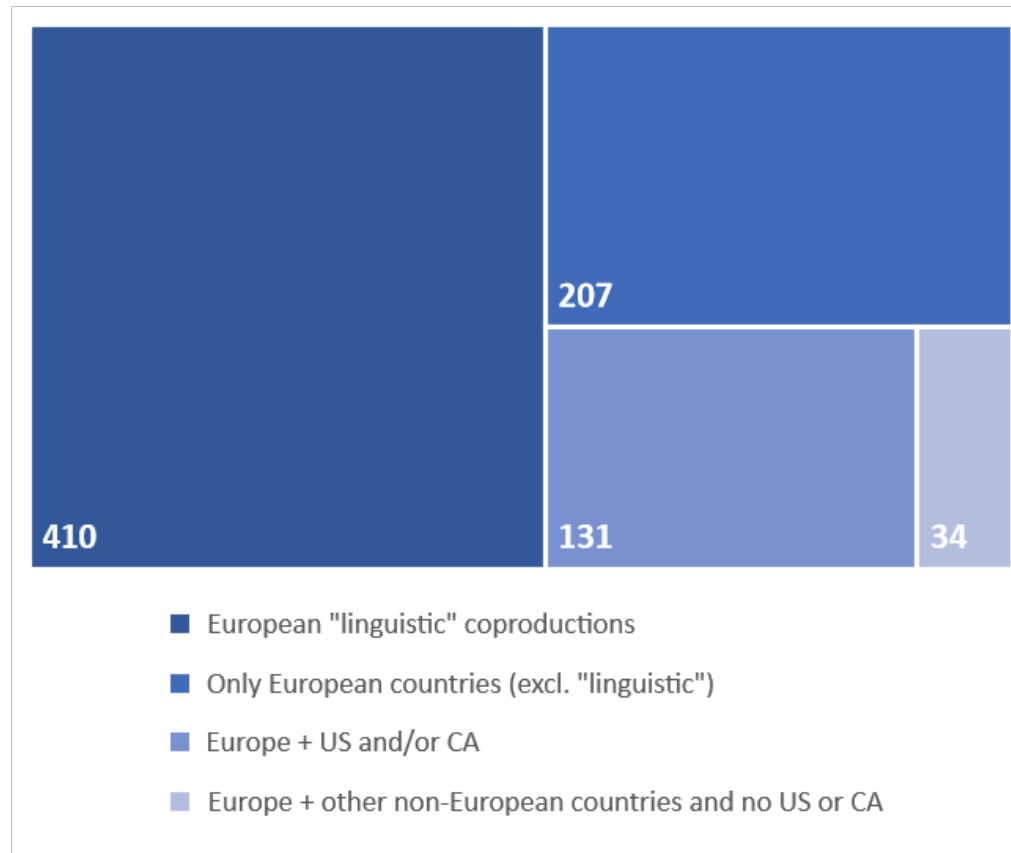
Number and share of co-productions by format (total 2015-2021)



Most non-linguistic co-productions include only European countries

- However, about one quarter 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 2015-2021)

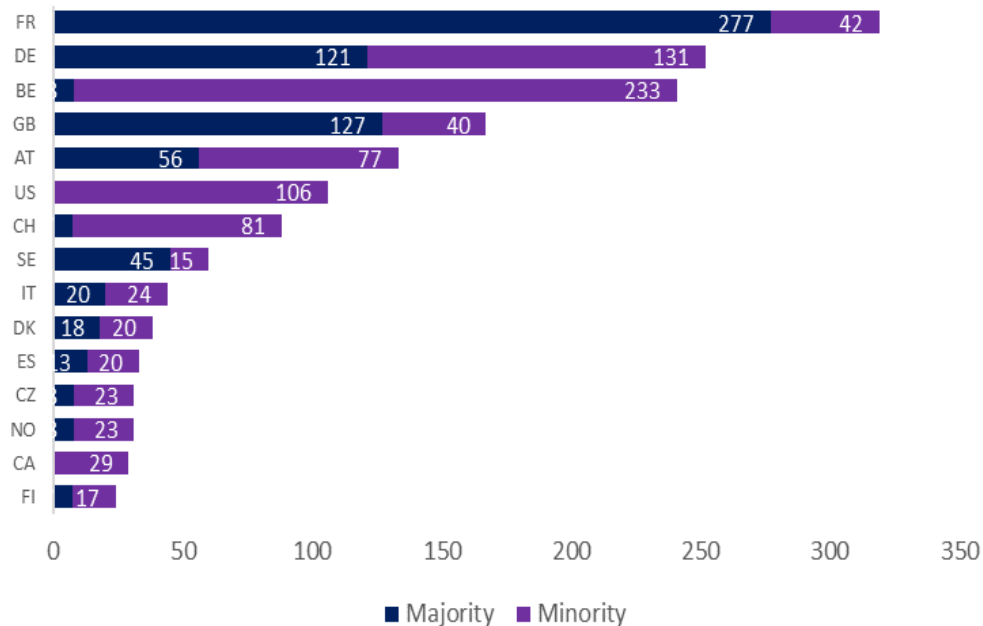


Source: European Audiovisual Observatory analysis of The European Metadata Group data

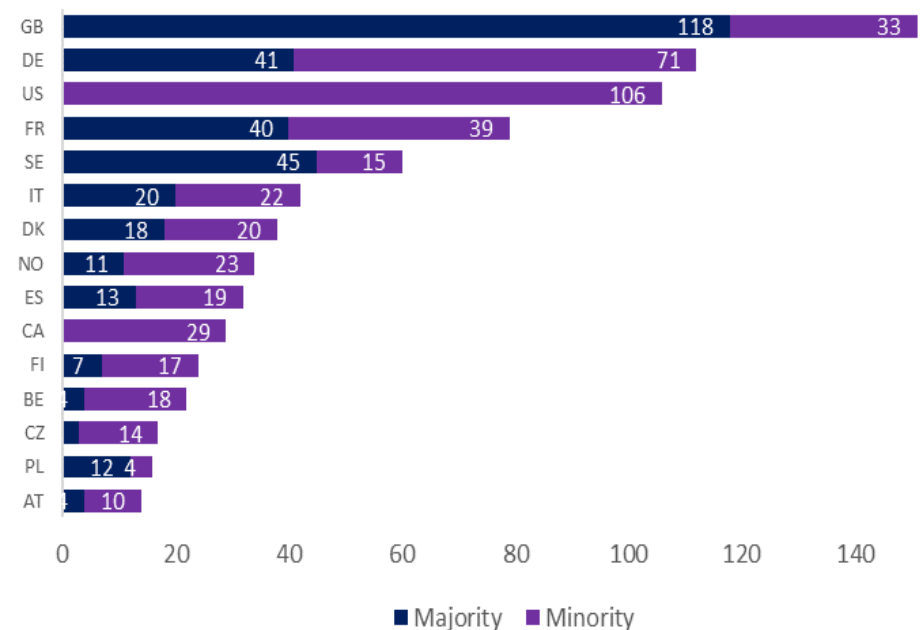
France, Germany and Belgium are involved in the highest number of co-productions

- 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 2015-2021)



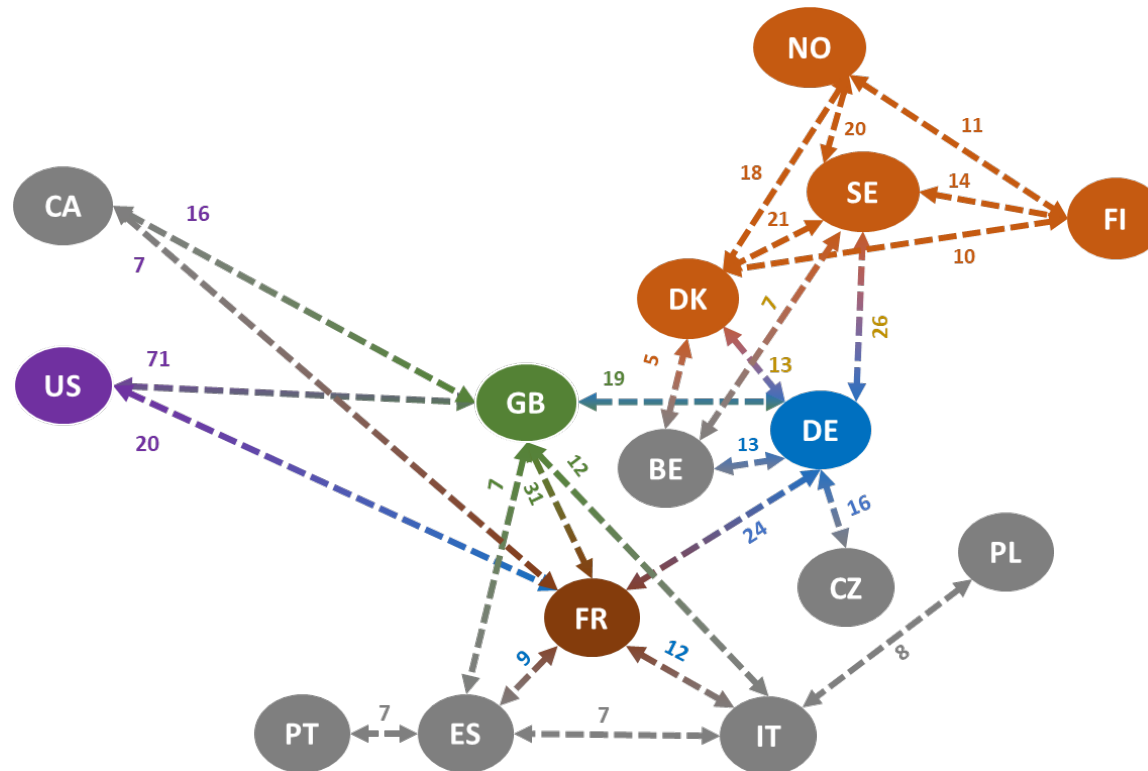
Number of participations in co-productions (excl. linguistic coprod., total 2015-2021)



Scandinavia, 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 three Scandinavian countries often co-produce with each other, but also significantly with Germany.

Number of partnerships in non-linguistic co-productions in selected countries (2021)



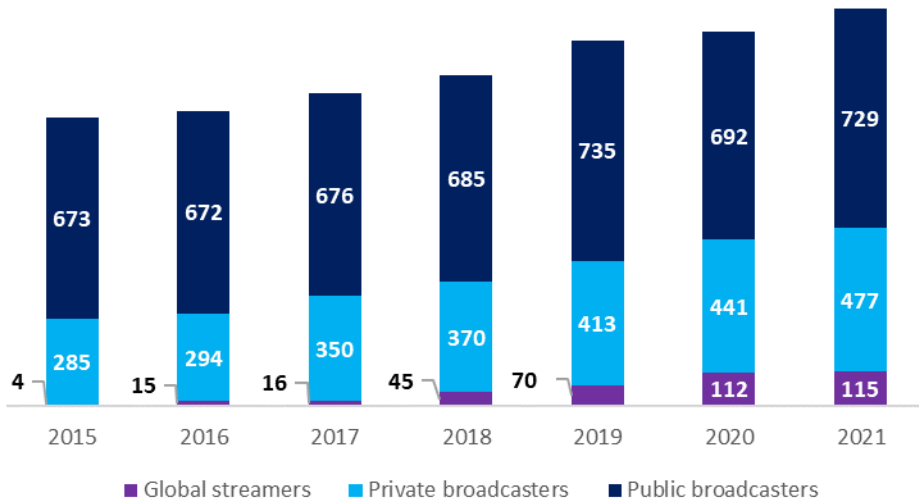
Important note: the number of partnerships differs from the number of projects. Denmark may have participated with Sweden and with Norway in the same projects.

Commissioners of European audiovisual fiction

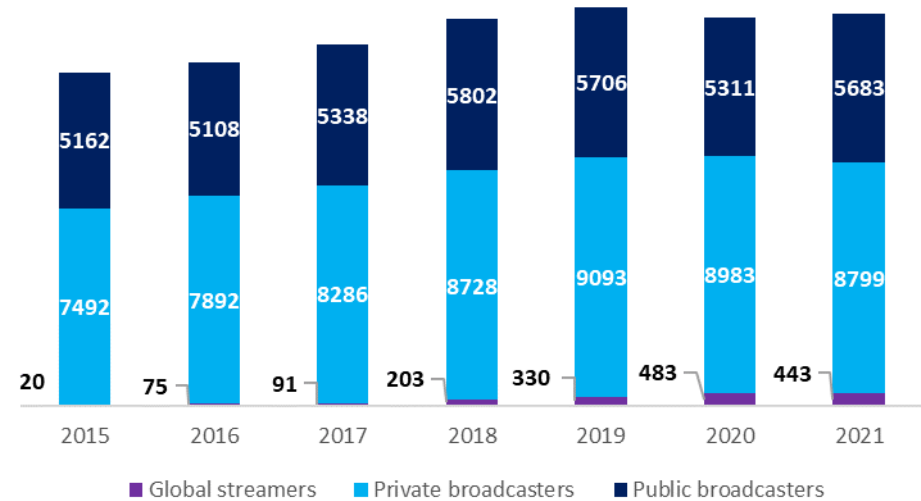
Public service broadcasters commission 55% of titles and 38% of hours

- Conversely, private broadcasters commission 36% of titles and 59% of hours. Indeed, private broadcasters tend to dedicate a higher share of their commissioning to daily soaps/telenovelas.
- Global streamers account for 9% of titles but 3% of hours as they do not invest in soaps/telenovelas.

Fiction titles commissioned by category of players (2015-2021)



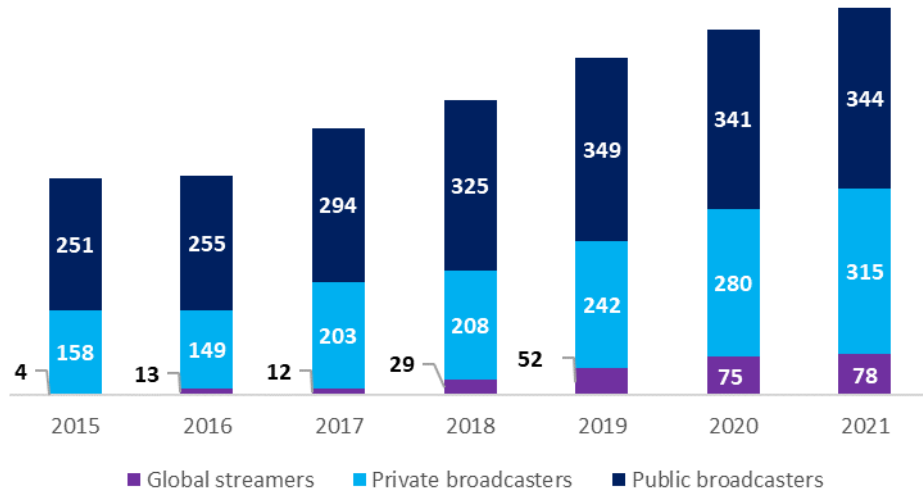
Fiction hours commissioned by category of players (2015-2021)



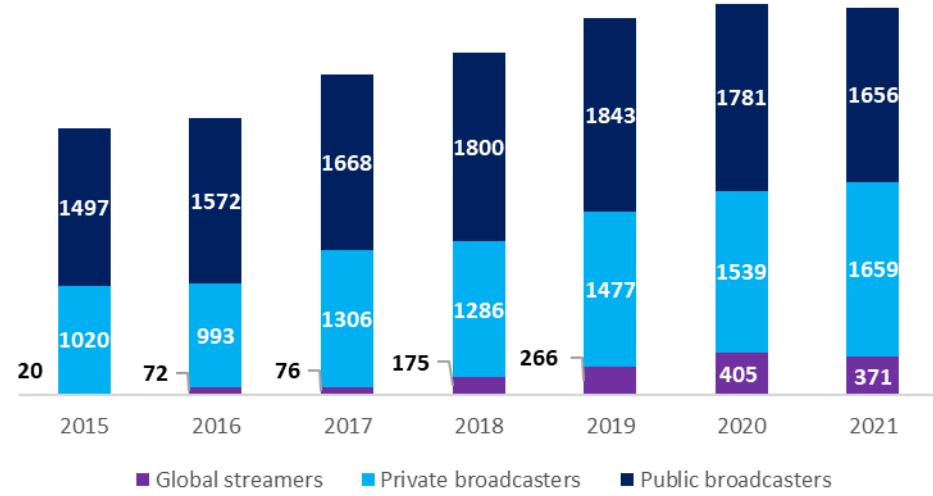
The picture is quite different when looking at less-than-13-episode-per-season series

- The share of private broadcasters in the commissioning of less-than-13-episode-per-season series has increased since 2015.
- The global streamers' share was at 11% in 2021, up from 1% in 2015, but stable when compared with 2020.

Less-than-13-episode-per-season series commissioned by category of players (2015-2021)



Less-than-13-episode-per-season series hours commissioned by category of players (2015-2021)



Source: European Audiovisual Observatory analysis of The European Metadata Group data

The BBC, Netflix and Warner Bros. Discovery led the commissioning of less-than-13-episode-per-season series

Top 20 commissioners of less-than-13-episode-per-season series titles (2021)

Rank	Group	Titles
1	BBC	60
2	Netflix	52
3	Warner Bros. Discovery	31
4	NPO	31
5	ZDF	30
6	France Télévisions	30
7	ARD	27
8	Telia Company	27
9	RTL Group	26
10	Sky (Comcast)	23
11	ITV	21
12	Sveriges Television (SVT)	20
13	TF1 (Bouygues)	20
14	Groupe Canal+ (Vivendi)	18
15	Bite Lietuva	16
16	Amazon	16
17	RAI	16
18	Yleisradio	15
19	Viaplay Group	15
20	Channel Four Television Corporation	14

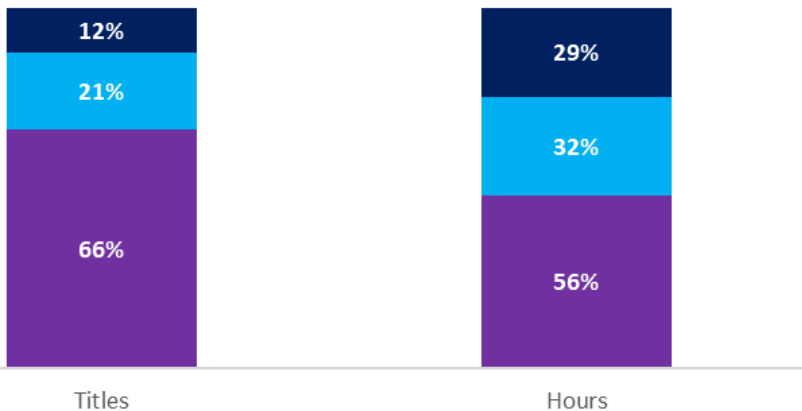
Important note: these figures are indicative as each title is attributed to only one broadcaster, even in the case of co-productions involving several broadcasters

Producers of European audiovisual fiction

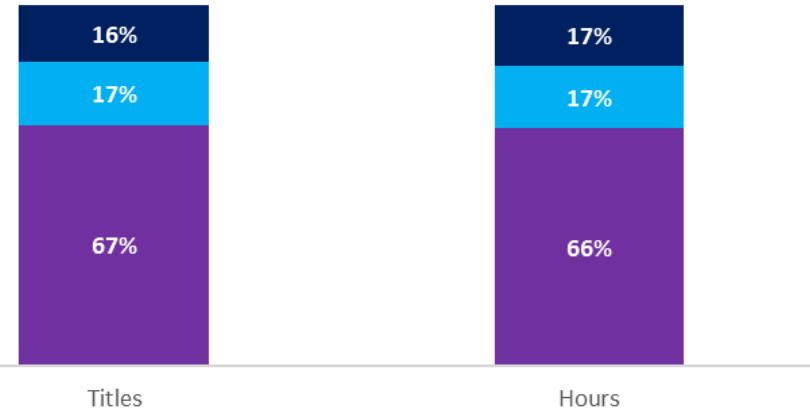
Independent production includes production from production groups non-affiliated with a major broadcaster, and production affiliated with a major broadcaster – but producing for another broadcaster

- Production by independent producers accounted for two thirds of titles (both for all formats and for less-than-13-episode-per-season series) and broadcasters working for third-party broadcasters for 12% and 16% of titles for all formats and for less-than-13-episode-per-season series, respectively.
- Please note that the actual control of IP rights is not taken into account.

**Breakdown of production by category of producer
(all fiction - 2021)**



**Breakdown of production by category of producer
(less-than-13-episode-per-season series, 2021)**



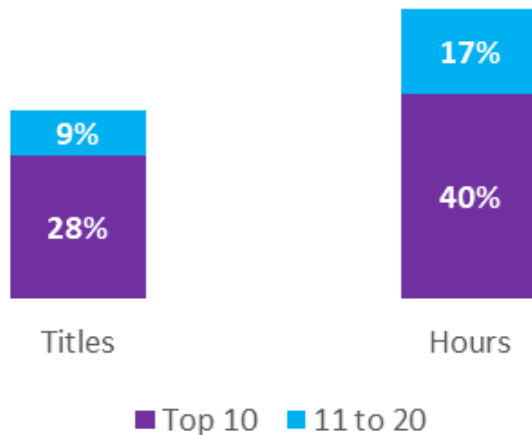
■ Affiliated production group for non-affiliated broadcaster
■ Affiliated production group for affiliated broadcaster
■ Non-affiliated production group

■ Affiliated production group for non-affiliated broadcaster
■ Affiliated production group for affiliated broadcaster
■ Non-affiliated production group

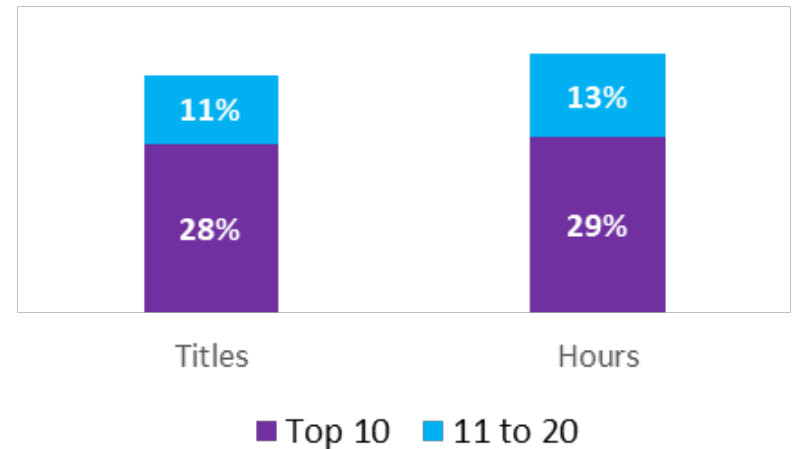
Top 20 producers account for 37% of titles and 57% of hours

- 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 less-than-13-episode-per-season series (39%), but lower in hours (42%).

Share of the top 20 producers out of total production
(all fiction, 2021)



Share of the top 20 producers out of total production
(less-than-13-episode-per-season series, 2021)



Top 20 producers account for 37% of titles and 57% 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 less-than-13-episode-per-season series (39%), but lower in hours (42%).

Top 10 producers (2021) by...

Number of titles produced

Number of independent titles produced

Number of different countries of production

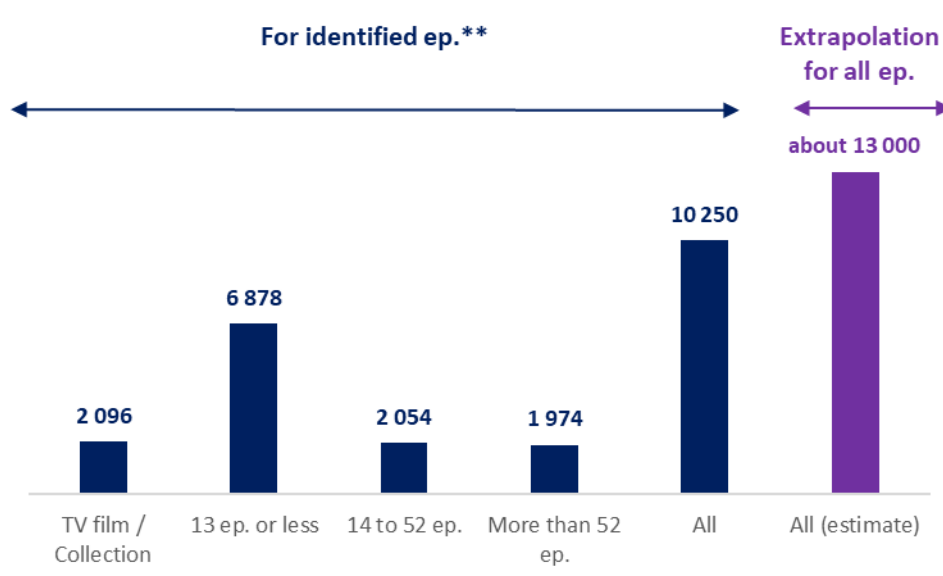
Rank	Group	Titles	Rank	Group	Titles	Rank	Group	Countries
1	Banijay Group	60	1	Banijay Group	60	1	Banijay Group	13
2	ARD	56	2	Mediawan + Leonine	40	2	RTL Group	9
3	RTL Group	44	3	RTL Group	31	3	Warner Bros. Discovery	9
4	Mediawan+Leonine	40	4	Warner Bros. Discovery	34	4	Mediawan + Leonine	6
5	Warner Bros. Discovery	39	5	ITV	20	5	ITV	6
6	ZDF	38	6	Newen (TF1)	19	6	Newen (TF1)	6
7	BBC	29	7	Beta Film	19	7	Vivendi	6
8	ITV	27	8	Highlight Communications	16	8	Viaplay Group	5
9	Newen (TF1)	23	9	Bonnier (Telia Company)	9	9	Beta Film	4
10	Beta Film	19	10	Marginales films	9	10	Highlight Communications	3

Screenwriters and directors of European audiovisual fiction

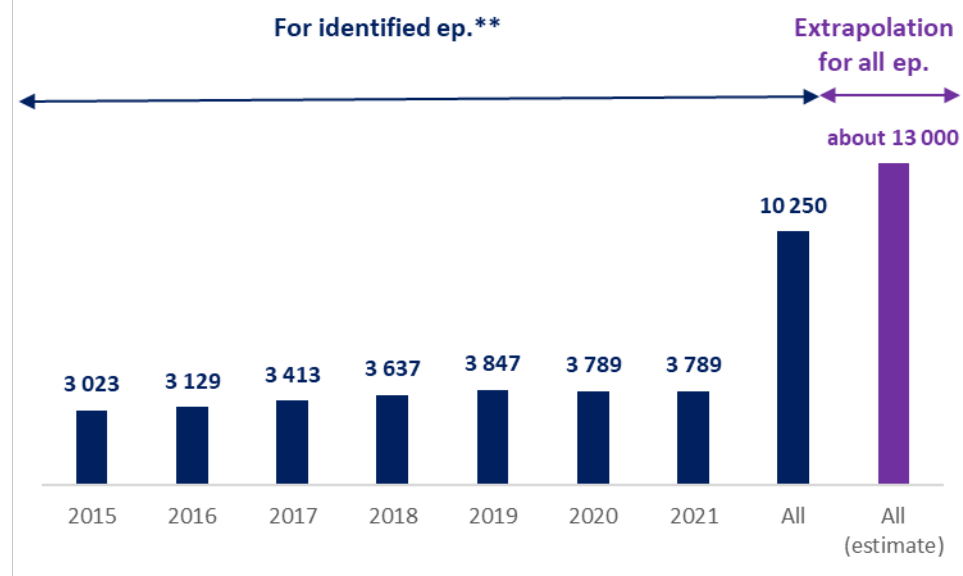
About 13 000 different writers involved in the production of fiction between 2015 and 2021

- For identified** episodes, over 10 000 different screenwriters wrote or co-wrote at least one fiction episode between 2015 and 2021.
- Extrapolating from the sample of identified episodes, the total number of screenwriters active in audiovisual fiction between 2015 and 2021 can be estimated at around 13 000.

Active screenwriters of AV fiction by format* (2015-2021)



Active screenwriters of AV fiction by year* (2015-2021)



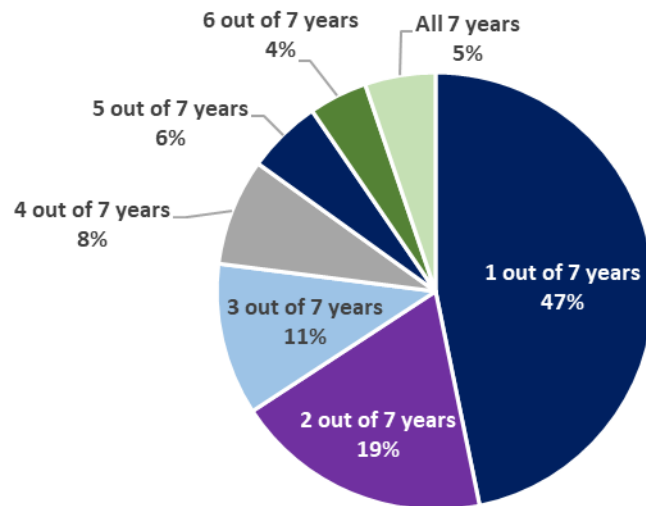
* All: the figure is lower than the sum of each year as there are double-counts between years.

** Identified episode: an episode for which at least one screenwriter or at least one director has been identified.

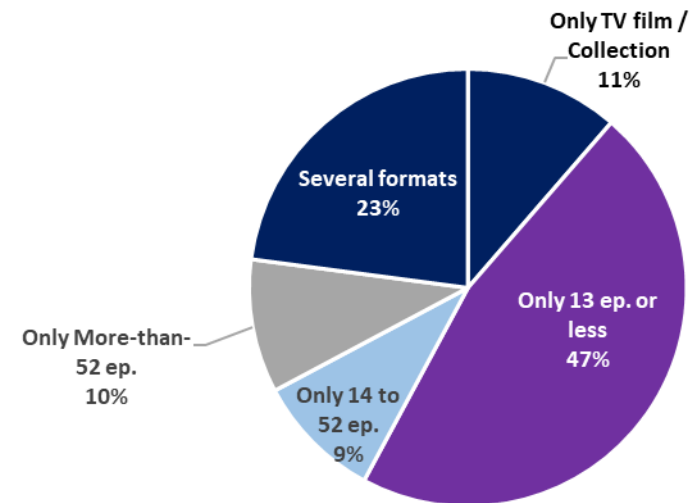
47% of identified screenwriters were active* in only one year between 2015 and 2021

- Only 5% of screenwriters were credited for at least one episode during each of the seven years.
- Screenwriters tend to be specialised by format: only 23% of them were credited for at least one episode of two or more different-format projects.

Screenwriters of AV fiction by number of years of activity between 2015 and 2021



Screenwriters of AV fiction active by formats (2015-2021)



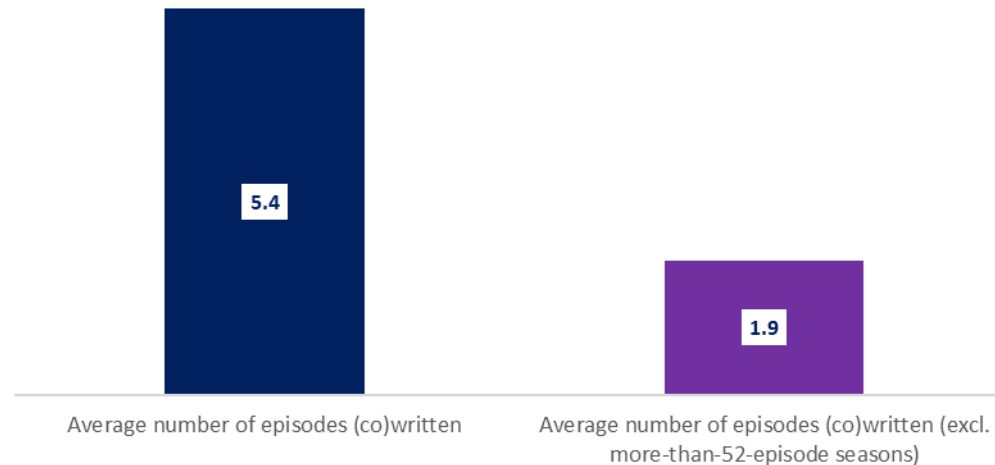
Source: European Audiovisual Observatory analysis of The European Metadata Group and IMDB data

* Active: credited for at least one episode released during the considered year.

On average, a writer (co)wrote 5.4 TV episodes or TV films per year between 2015 and 2021

- But, excluding series with more than 52 episodes, the figure is only 1.9 episode (co)directed per year, as few writers write a significant share of long-running soaps.

**Average number of episodes (co)written per year
between 2015 and 2021 by all active screenwriters**

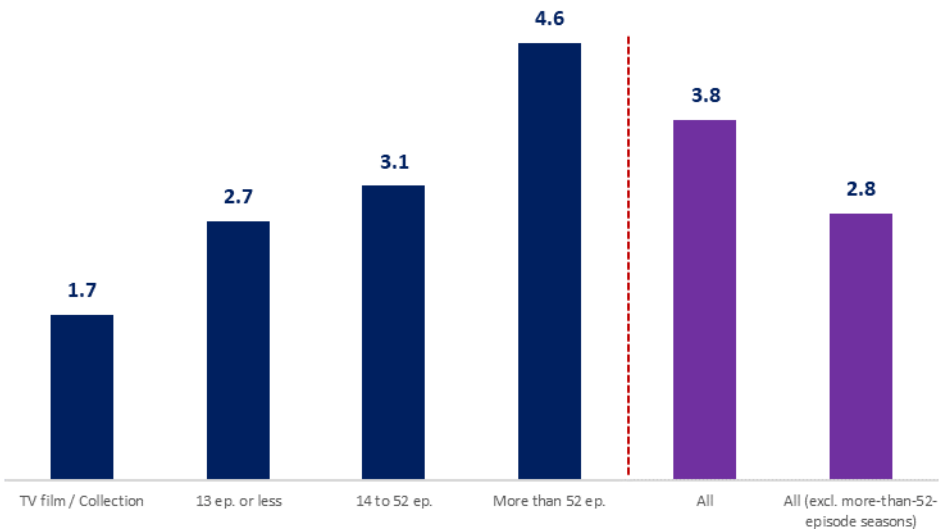


Source: European Audiovisual Observatory analysis of The European Metadata Group and IMDB data

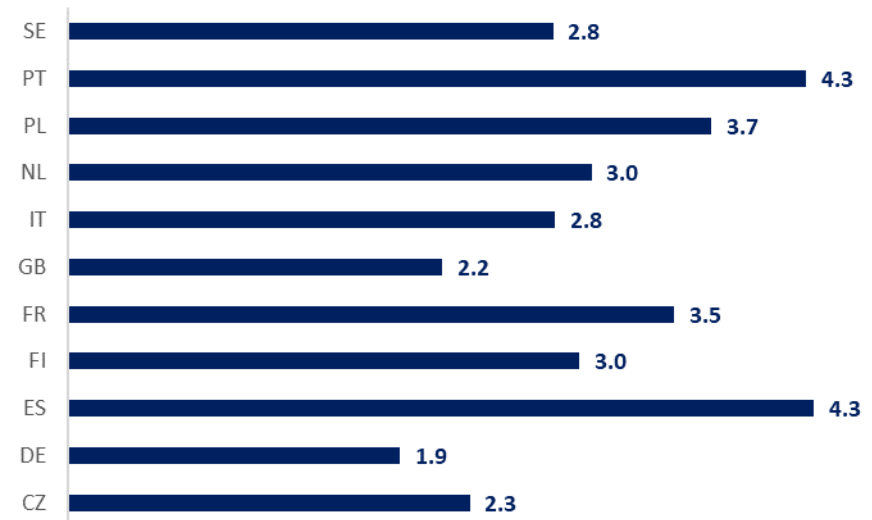
73% of all episodes released between 2015 and 2021 were co-written

- The average number of screenwriters per episode is 3.8 but 2.8 when excluding more-than-52-episode seasons.*
- More screenwriters are credited per episodes for Polish, Spanish and Portuguese TV fictions.

Number of screenwriters per episode and by format (2015-2021)



Number of writers per episode in selected countries of production (excl. more-than-52-episode series, 2015-2021)

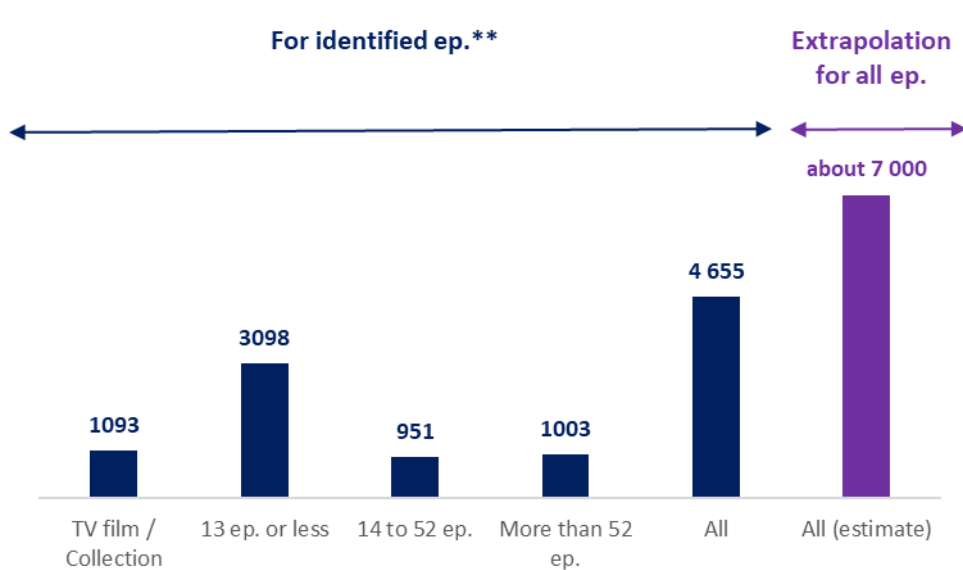


* For telenovelas or soaps the writers and directors are often credited for all episodes, whatever the number they actually write or direct.

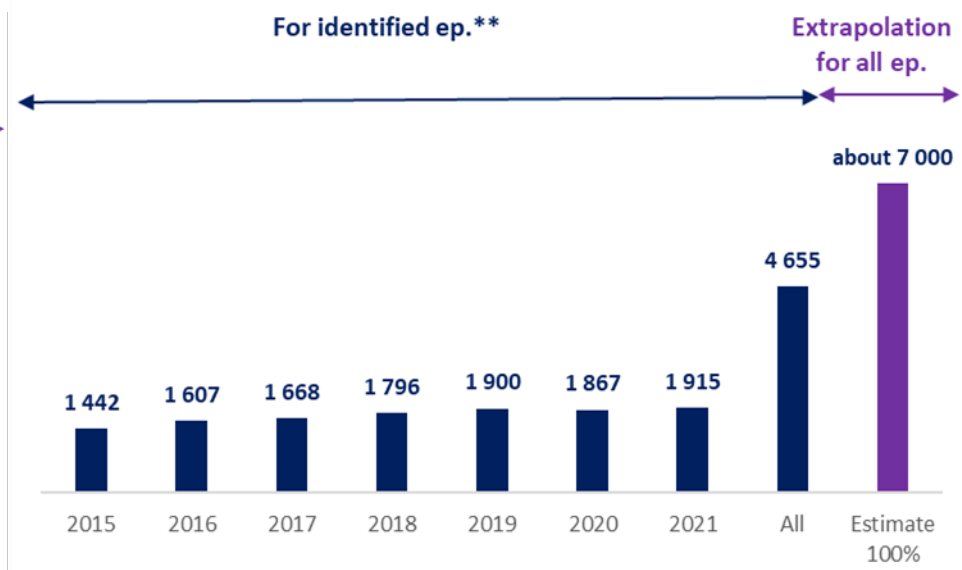
About 7 000 different directors involved in the production of fiction between 2015 and 2021

- For episodes identified,** over 4 500 different directors directed or co-directed at least one fiction episode between 2015 and 2021.
- Extrapolating from the sample of identified episodes, the total number of directors active in audiovisual fiction between 2015 and 2021 can be estimated at around 7 000.

Active directors of AV fiction by format* (2015-2021)



Active directors of AV fiction by year* (Total 2015-2021)



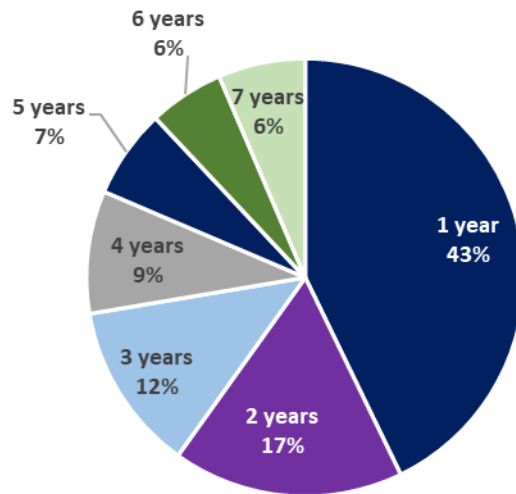
* All: the figure is lower than the sum of each year as there are double-counts between years.

** Identified episode: an episode for which at least one screenwriter or at least one director has been identified.

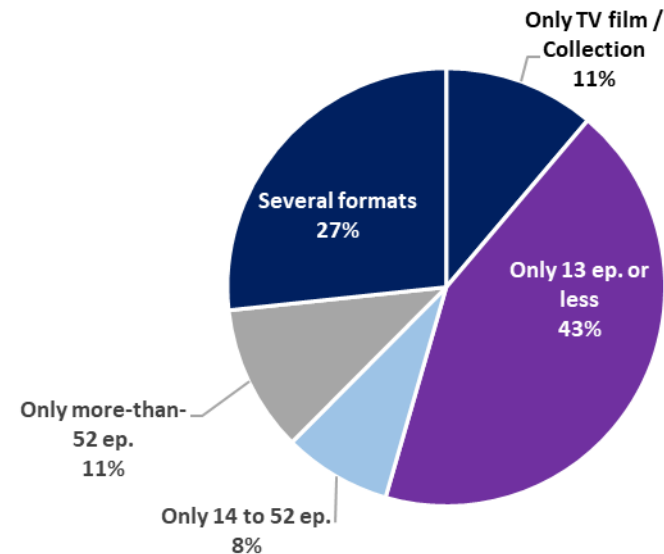
43% of identified directors were active* in only one year between 2015 and 2021

- Only 6% of directors were credited for at least one episode during each of the seven years.
- Like screenwriters, directors tend to be specialised by format: only 27% of them were credited for at least one episode of two or more different-format projects.

Directors of AV fiction by number of years of activity between 2015 and 2021



Directors of AV fiction active by formats (2015-2021)



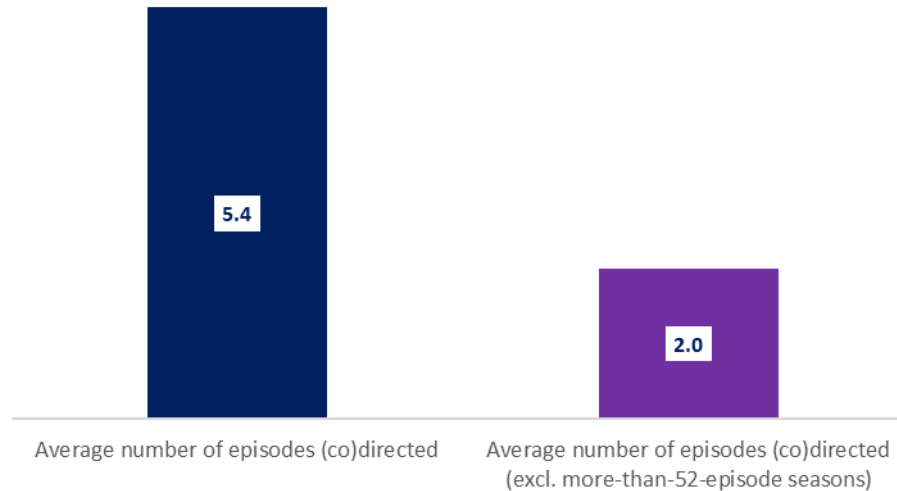
Source: European Audiovisual Observatory analysis of The European Metadata Group and IMDB data

* Active: credited for at least one episode released during the considered year.

On average, a director (co)directed 5.4 TV films or episodes per year between 2015 and 2021

- But, excluding series with more than 52 episodes, the figure is only 2.0 episodes (co)directed per year, as few directors direct a significant share of long-running soaps.

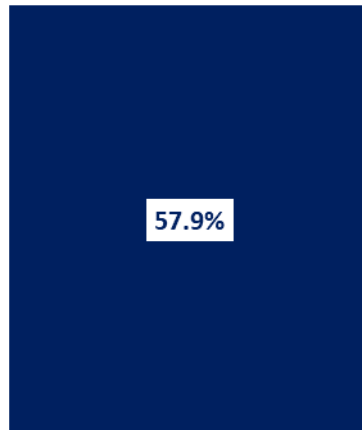
**Average number of episodes (co)directed per year
between 2015 and 2021 by all active directors**



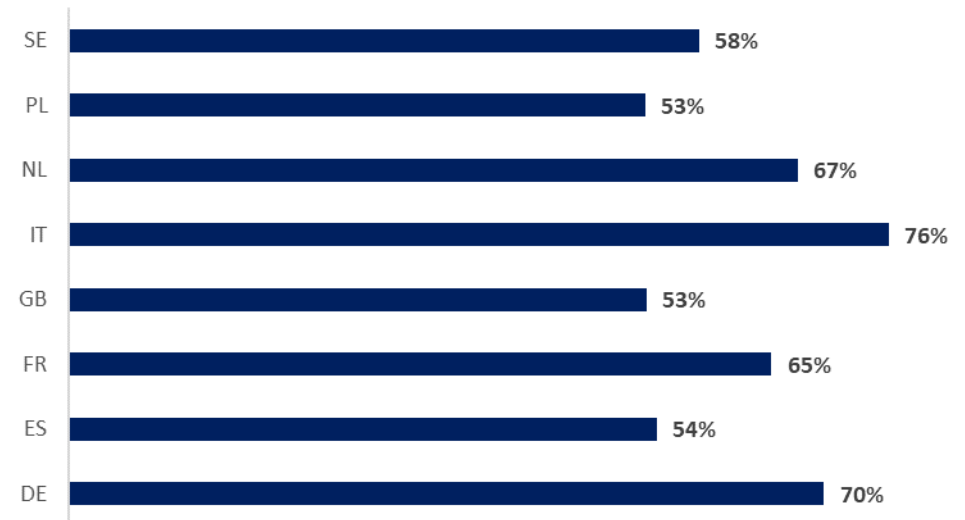
58% of TV films and fiction series directors have also directed a theatrical film

- The share significantly varies between countries of production: from 53% in the UK and Poland to 76% in Italy.

Share of 2015-2021 directors of AV fiction present in the LUMIERE database



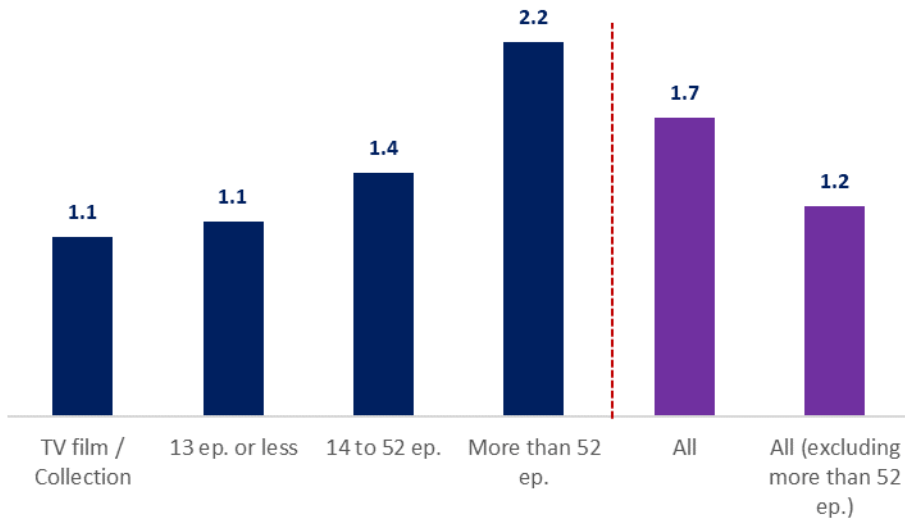
Share of 2015-2021 directors of AV fiction present in the LUMIERE database in selected countries



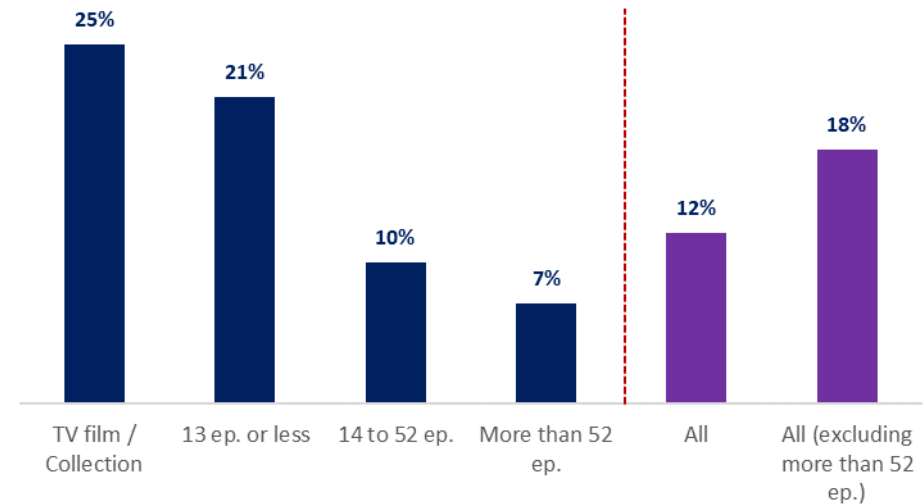
32% of all episodes released between 2015 and 2021 were co-directed

- The average number of directors per episode is 1.7, but 1.2 when excluding more-than-52-episode seasons.*
- Directors are also credited as screenwriters (or as one of the screenwriters) for 25% of TV films and 21% of episodes of 2-to-13-episode series.

Number of directors per episode and by format (2015-2021)



Share of episodes with at least one director also credited as screenwriter, by format (2015-2021)



* For telenovelas or soaps the writers and directors are often credited for all episodes, whatever the number they actually write or direct.

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More information:
www.obs.coe.int
gilles.fontaine@coe.int

