



## **Schedule Watch Content Opportunities Report 2019/20**

Based on C21Media's premium Schedule Watch strand, which analyses global schedules and programming trends worldwide and the annual Schedule Watch Content Opportunities Report, this data download session uncovers the programming requirements of the leading channels in leading markets worldwide.

What are the programming missions of the most active channels worldwide and how can you get a piece of the action?

This report is cross-genre and is designed to provide a road map to effective content development, coproduction and sales in the international market. It will be available online after the session.

**C21Media**

### **1 Top 10 trends**

An analysis of global schedules and programming trends worldwide, providing a road map to effective content development, coproduction and sales in the international market.

### **A selection of C21 Schedule Watch reports:**

#### **11 Atresmedia – Spain**

Atresmedia is consolidating its Turkish acquired content and preparing its own scripted formats.

#### **16 Mega – Chile**

Chile's Mega is expanding its scripted strategy and looking for more international partnerships.

#### **21 NRK – Norway**

NRK drama chief Ivar Køhn discusses the pubcaster's evolving drama strategy and current priorities.

#### **26 TF1 – France**

France's leading free-to-air broadcaster is pushing further into new territory on the drama and entertainment fronts.

#### **32 Wowow – Japan**

The Japanese premium pay broadcaster is broadening its range of acquired fare

# Top 10 trends

By Gün Akyuz, C21Media research editor

Based on C21's premium Schedule Watch strand, which analyses global schedules and programming trends worldwide, discovering the programming requirements of the leading channels in major markets and exploring the programming missions of the most active channels and how you can get a piece of the action.

This report is cross-genre and is designed to provide a road map to effective content development, coproduction and sales in the international market.

Following extensive interviews with buyers from channels and platforms worldwide, the Schedule Watch team at C21 has outlined 10 broad trends that are changing the way content is being developed, bought and sold around the world.

Identifying trends is one thing; the aim of this report, however, is to tease out the content opportunities that those trends offer producers and distributors in the business of developing, pitching and distributing the programming that the market needs. Some of these trends might already be on your radar, some might not. But either way they're impacting your business and should be reflected in your content strategy going forward.

## **1. Local and original content is combatting fragmentation and attracting viewers across demographics and platforms.**

No one would dispute that the biggest trend over the past 10 years has been the relentless rise in demand for original, local programming.

Content that broadcasters or platforms can control and leverage across windows and over time sits at the heart of the programming alliances and battles between free and pay linear broadcasters and, increasingly, OTT players.

Many broadcasters, channels and digital platforms profiled by Schedule Watch lead in their markets and/or are carving distinctive roles with the help of new original fare, and that imperative has never been greater in today's fragmented, multi-platform, multi-window landscape.

With linear television audiences falling, younger viewers all but abandoning linear and on-demand viewing becoming mainstream, local incumbents have been transforming their business models to make their channels and platforms relevant to viewers.

Demand for content has risen sharply with the proliferation of channels and platforms, with local relevance and content curation now key. National broadcasters would naturally claim this territory. But it's no coincidence, however, that streamers like Netflix are increasingly chasing local fare and claiming personalised curation too.

Distinctive local fare is where the majority of programming opportunities arise across scripted and unscripted for producers, format sellers and distributors alike.

Fabrice Bailly, head of programmes and acquisitions at France's TF1 Group, summed it up best. He described 2018 as a year of transformation for the group across linear and VoD catch-up service, topped by a new wave of original drama, plus local and international entertainment formats, but also acquired



The Good Doctor helped revive US series in primetime on TFI

US hit The Good Doctor. "On-demand use changes many things for us because of the way it can build audience loyalty," he said. "Catch-up is a loyalty marker."

**Opportunities:** Plenty, in terms of both original ideas for local programming and imported formats, allowing channels an alternative route into local programming. It's no coincidence that UK-based analyst Oliver & Ohlbaum (O&O) predicts global spending on drama to double from US\$18bn in 2016 to US\$36bn in 2025. O&O also says global spending on unscripted formats will rise from US\$20bn in 2016 to US\$32.5bn by the same year.

In addition, 2019 will be an interesting year of originated and licensed content opportunities with streamers operating in Europe as they look to local fare to meet 30% European Union local content quotas from fall 2020.

## 2. US programming is changing gear.

There's still a vibrant market for acquired programming, despite a marked shift in gear around US series, now largely elbowed out of primetime schedules in favour of more relatable local equivalents. They're more likely to be seen on smaller niche channels and OTT platforms.

Take Germany, where US series have come under increasing pressure in the free TV market. Commercial broadcaster RTL Group's main channels now prioritise in-house production, says the group's senior VP of international acquisitions, Silke Regier.

"US series have had increasing difficulty in recent years and only a few exceptions have actually had long-term success with viewers," she says. US content remains a "relevant programming component" for the group's niche free and pay TV channels and non-linear offerings, although less so for its bigger channels, she notes. One of them is Now US, a new niche online channel dedicated to US shows such as Modern Family, Suits, Breaking Bad and White Collar.

A few US series have made a comeback in primetime schedules as events. Nevertheless, it's a sign of the times that one of the most in-demand US

dramas internationally in 2018, from France to Japan, was Sony Picture Television's *The Good Doctor* for ABC, a US remake of a Korean drama. In France, it helped revive US series in primetime on TF1, reaching 7.9 million viewers and 30%-plus shares among all viewers.

Japan's pay market has become surprisingly fertile territory for foreign fare. For pay service Wowow, 70-80% of its schedules are acquired and a defining characteristic in a country historically indifferent towards imported content. Wowow Prime airs seven overseas TV dramas per week along with local original series, movies and documentaries, with *The Good Doctor* the standout import on Wowow Prime in 2018, said Kayo Washio, Wowow's head of US operations

**Opportunities:** There is still sizeable demand for US drama series on secondary channels and smaller, regional OTT services. Furthermore, audience demand in the US seems to be shifting in favour of more local narratives and stories reflecting the US experience. Whether that's driven by the rise of Middle America since Trump's election and the scramble by some networks to reach those rust-belt viewers who were overlooked for so long, or by the new diversity-driven focus on the experiences of other marginalised communities in the US, the result is the same: American programming is getting more American.

Mark Kaner, president of 20th Century Fox TV Distribution, recently complained that the trend was making it harder to sell US programming to the global market. "The US networks in the past five years or so have become more US-centric, and that's not a good thing," he told delegates at Natpe Miami.

As US programming becomes more expensive, ubiquitous on SVoD platforms, less exclusive and more inward-looking, this creates opportunities for programming from other territories to be acquired on preferred terms.

### **3. The shift to on-demand viewing habits has triggered a range of new, more complex windowing deals, which are set to change again as more vertically integrated global streamers, such as Disney, WarnerMedia and others, roll out over the course of 2019.**

Japanese acquisition-driven U-Next is the country's largest SVoD service and also one of the fastest growing OTT platforms in the country, thanks to younger Japanese viewers who increasingly watch content on their smartphones.

It has successfully secured TVoD and SVoD deals with every major studio, says Jeffrey Shimamoto, head of international business development. "We recently signed a deal with the 20th Century Fox SVoD team [including shows like *Prison Break* and *The Walking Dead*], that has helped us round out our major Hollywood studio offerings."

But multi-platform local broadcasters require more rights to both licensed and coproduced content to feed and market their linear and on-demand services.

This shift is neatly highlighted by Norwegian pubcaster NRK, which is prioritising its online player, a move underpinned by new rights-sharing



Jeffrey Shimamoto

and windowing arrangements for productions, ranging from in-house and external commissions and coproductions with Norway's independent sector to international copros.

The pubcaster's head of drama, Ivar Køhn, says short licence periods – typically covering a premiere, three weeks' catch-up and a couple of reruns over a period of two to four years – have been replaced by rights in perpetuity for NRK's own shows and between seven and 10 years of unlimited publishing rights across linear and VoD for drama coproduced with Norwegian companies.

"If we want to compete in the new reality of the TV industry, we have to have different kinds of rights," he says. "What's important for us is that we can show Norwegian drama on our player for a very long time, maybe forever. If it's not

possible to see the drama we produce on our player, it has no value for us."

When it comes to coproduction partners, streamers or not, NRK has taken a tough stance. Køhn says partnerships could be with anyone, "but they won't get any window in the Norwegian market."

However, fellow Nordic pubcaster SVT is partnering with local and global streamers like Viaplay and Netflix for hit scripted shows like *The Restaurant (Vår Tid är Nu)* and FLX's hit comedy *Bonus Family*, respectively, with SVT securing the premiere window.

**Opportunities:** Distributors offering more flexibility around rights are going to thrive in this new environment. And in the

vertically integrated future, as programming gets diverted away from third-party licensees to OTT platforms and linear services owned by the rights owners, this will create demand for quality independent content from non-aligned studios.

#### **4. Coproductions have also evolved from ad hoc partnerships based on specific productions into strategic alliances allowing smaller national players to be more competitive in the global scripted and unscripted marketplace.**

The latest to emerge in the past year include long-term partnerships among Europe's public broadcasters, such as the Nordic N12 group and French-German-Italian pubcaster partnership *The Alliance*. Other interesting clubs include NENT-backed consortium *Atrium*, largely comprising telcos keen to enter the content sector, and the drama alliance between France's TF1, Germany's RTL and NBCUniversal to revive procedurals.

The latest to emerge are notably among Europe's public broadcasters, such as the Nordic N12 and *The Alliance* in the scripted world. They have arisen specifically to allow local networks and platforms to compete with the global players, and deliver the scale and quality of projects viewers have become accustomed to.

SVT partnered with Viaplay on *The Restaurant (Vår Tid är Nu)*



Last May's formation of co-financing and coproduction venture The Alliance, between France Télévisions and fellow pubcasters ZDF of German and Rai of Italy, is designed to build a European production pool to help finance innovative, high-end TV series able to match those of the global OTT players. It was inspired by N12, formed earlier that year by Scandinavia's pubcasters and which operates on a similar principle.

"The Alliance is a club where we very much share projects upfront," explains Nathalie Biancolli, exec VP of international scripted coproductions at France Télévisions. "We meet every two months, each country brings its own projects, pitching two or three, and it works along the lines of a first-look deal. We keep it very flexible, we can get involved through a variety of ways, from a basic pre-buy to a formal coproduction. We remain free to coproduce projects outside The Alliance and will do. It's really a club. We have the shows' financial set-ups in mind and volunteer to help them exist."

Three projects were originally greenlit as part of The Alliance. France Télévisions and ZDF came together on *Mirage* (6x52'), a Dubai-set thriller, from Lincoln TV, Cineflix and Wild Bunch Germany. The other two saw France Télévisions link up with Rai: Luxvide's *Leonardo* (8x52'), with Beta Film on board, and *Eternal City*, a thriller set in 1960s Rome from Banijay-owned Aurora TV and Fearless Mind.

This trend is not just happening in the scripted world. In Latin America, regional pay TV group Viacom is partnering with erstwhile rivals from the FTA space, Mega in Chile and TV Azteca in Mexico, on ambitious reality series *Resistiré*, marking a major change in strategy for the pay TV firm.



Fredrik Arefalk,

**Opportunities:** Pitching content with the content needs and rights requirements of these new partnerships in mind. If new alliances are happening on the buying side of the business, the production and distribution sides also need to adapt their approaches to the changing landscape.

### **5. Demand for family-friendly programming remains as strong as ever. As the argument goes, a family-friendly show will attract viewers from cradle to grave.**

Instead of chasing younger viewers at the risk of alienating other demographics, broad-appeal shows are in demand more than ever among generalist channels. Moreover, entertainment shows as well as drama and documentaries are increasingly making an impact in both linear and online. And online is where free-to-air broadcasters can connect with younger viewers.

Along with live TV, it's the area that probably distinguishes the FTA generalists the most from their pay TV counterparts and streaming rivals. It's also the central battleground for the next big thing in the unscripted world.

Growth at Sweden's TV4 has continued this year and the engine of TV4's growth is its local family-friendly Swedish content, and is key to competing with the big global SVoDs like Netflix, says Fredrik Arefalk, head of TV4's channels and SVoD service CMORE, covering films and series. "It is unique content you can't see anywhere else and works both linearly and digitally, and that's the main asset." Entertainment shows like *Idol* and the broadcaster's relaunched *Survivor* (*Expedition Robinson*) are achieving that.

Over in Chile, Turner Broadcasting System-owned FTA network Chilevisión has

become the second largest channel on the back of a strategic change of image and content to focus on a more family-oriented offer, says Javier Goldschmied, director of programming and production at Chilevisión. “We want content that gathers people together and sparks conversations.”

At the UK’s Channel 5, director of programmes Ben Frow has introduced a mantra calling for broad-appeal shows.



Fredrik Arefalk

“We’ve always gone really broad. If we go broad, it will deliver the audiences we need. We’re a commercial channel; everybody knows that 16-34s are worth more than ABC1s and mainstream C2DE audiences,” said C5’s factual commissioning editor, Emma Westcott. “But if you always have that big audience, the young will come. Like every channel, we are craving young people. But if you target them, they’ll sniff that a mile off.”

**Opportunities:** The wins are big for the right show, and there’s an ongoing need for broadcasters across scripted and unscripted for family-focused content. The headlines, critics and awards ceremonies might prefer edgy, ‘cabley’ dramas that encourage binge-viewing on SVoD among a certain demographic, but the Schedule Watch team is increasingly hearing about pent-up demand for broader fare.

### 6. Ageing populations in mature markets also offer opportunities in a landscape predominantly chasing younger demos.

Take Canadian speciality broadcaster ZoomerMedia, which targets the over-45s. For two of its channels, VisionTV and lifestyle-led OneTV: Get Fit, Beverley Shenken, VP of content and programming, says that as bigger network and SVoD buyers increasingly target generally younger demos, she and her team have been able to continue to acquire the older-skewing content that works well for their channels.



Beverley Shenken

“Having said that, though, there are fewer and fewer of those things. I’m finding, especially in the British scripted realm, that the UK is somewhat fascinated with true crime and true crime drama, and rather gory procedural stories that don’t work for my audience,” Shenken says, with some concern.

Another example is public commercial broadcaster TV2 in Denmark, whose older-skewing network TV2 Charlie has been something of an ongoing success story for the group for some time and remains unchallenged in the local market.

At its best it can attract main channel audience levels, making it the fourth most watched network in Denmark. It targets the over-50s with a mix of acquired and local fare offering “a heart-warming, entertaining and trouble-free zone. That’s what we’re going to build on because it’s proving extremely powerful, and no one is battling that niche with us,” says channel controller Lotte Lindegaard.

**Opportunities:** The wins are big for the right show. There’s an ongoing need among broadcasters for scripted and unscripted programming that targets older demos. And it’s not just public networks where this need is felt but increasingly commercial ones too, as an audience that previously did not register in the ratings grows in size and spending clout.



### 7. The changing telenovela and enduring demand for Turkish drama.

Despite regular predictions that the Turkish telenovela trend would finally end, it's still finding new markets as well as retaining its popularity in regions like Latin America, thanks to a number of factors, including a broadening range of themes and its family values.

Spain is the latest market to take the plunge, where commercial broadcaster Atresmedia scored a hit on its female-skewing channel Nova last year with Ay Yapim's Fatmagül and has secured several more, including signing a scripted format deal.

The Atresmedia group's head of content acquisitions and sales, Mercedes Gamero, calls it the most surprising trend for the company in 2018, a success that has led to its rival Mediaset España following suit.

Digital channel Nova has been the traditional rendez-vous for telenovelas since the channel's launch. But with Latin American telenovelas moving increasingly into more local themes and 'narconovelas,' Gamero says they are no longer relevant to Nova's audiences.

Gamero has also looked further afield, including at Korean series. "We're not brave enough yet and we don't know if the audience would be prepared for them," she says, adding that she would have liked to secure the US version of South Korean series *The Good Doctor*.

Atresmedia has now picked up format rights to a local version of *Fatmagül* along with rights to Argentinian drama *Amar Después de Amar* (Love After Love). The latter was previously adapted by Mexico's Televisa as *Caer en Tentación*.

For Chile's leading channel, Mega, also the country's largest local fiction producer, which first put Turkish

telenovelas on the map in Latin America four years ago, they remain a staple. They are a top draw in daytime alongside a volume deal for Globo's Brazilian fare, and also air later in the evenings.

Since debuting the hugely successful *1001 Nights (Binbir Gece)* in 2014, Mega has aired around 25 other Turkish telenovelas, including *Anne (Mother)*, based on the original Nippon TV scripted format, distributed by Global Agency; and *Kizim (My Daughter)* from prodco Medyapim, featuring *Anne* star Beren Gokyildiz.

Mega has already made its first attempt to cross-fertilise Chilean and Turkish telenovelas with *Perdonas Nuestros Pecados*, which featured music by Turkish composer Tolga Işıkli (Fatmagül). "Now we want to coproduce and we're talking with leading producers in Turkey about how to make this work," said Juan Vicente, director of content and international business.

**Opportunities:** As traditional suppliers of telenovelas move into edgy scripted coproductions with shorter runs in the hope of cracking the global SVoD market, a gap is being created in the market for old-school soapy serials. Witness how, even in Latin America, buyers are now picking up telenovelas from not just Turkey but much further afield, such as distributors GMA Worldwide and ABC-CBN in the Philippines.



1001 Nights (Binbir Gece) was a hit for Mega in 2014

**8. Authentic unscripted is gaining in currency among broadcasters, notably among Europe's Nordic public broadcasters, but also others.**

A recent example is the decision by Channel 5 in the UK to axe Big Brother in favour of more authentic, life-affirming programming. The removal of the 20-year-old show has opened up a large range of opportunities at the channel in the unscripted space, a number of which have already been commissioned,



Channel 5's Michael Palin in North Korea

said C5 factual commissioning editor Emma Westcott.

Key priorities are the channel's factual slots at 20.00, 21.00 and 22.00. Inside the Tower of London, from Lion Television, and Warship: Life at Sea, from Artlab Films, are among a range of different types of programmes now getting big audiences. "It's our part of this whole creative renewal; it's a continuous process and we just have to keep commissioning and one idea will hit," she says.

A key shift at the channel has been the increase in heart-warming shows, with On Yorkshire Farm following other similar hits

such as The Yorkshire Vet. "It's a really good example of how Ben [Frow] has been changing the channel from lots of quite 'shouty' shows to ones with a bit more joy and celebration," said Westcott. "Sheep can still die and we can cry but, fundamentally, it's got heart and that's been a big move."

The channel is also gaining traction with a growing slate of shows fronted by famous faces. Westcott highlights the likes of Michael Palin in North Korea; Michael Portillo in Hidden History of Britain and Our Housing Crisis; Tony Robinson in Coast to Coast; and Michael Buerk and John Sergeant in Britain By Boat. He says: "They're all familiar, warm, good-hearted people. They're quite clever but you'd want to spend time with them in a pub, hang out with them, but they also tell you something. That familiarity for our audience is really important."

**Opportunities:** Steer your format development agenda away from fit, scantily-clad youngsters flirting on a beach towards more authentic people tackling life's challenges in uplifting ways. The audience for unscripted formats are now so used to the genre that the milieus, mechanisms and devices used in reality or gameshows are now so well-known and over-used that audiences find them predictable. Developers need to address real people in the real world and should changing their casting procedures accordingly.

**9. On-demand viewing habits have led to more flexible programming strategies, with a growing number of broadcasters not necessarily fighting for viewers slot-by-slot, in favour of multi-window opportunities.**

Jill Offman, Viacom's executive VP who heads Paramount Network and the Comedy Central brands outside of the US, points to the fact that scheduling has moved on from "fighting slot-by-slot" to a very different windowing

strategy looking at the overall return on investment for content and how its exposure will reach as many people as possible. “It’s what’s important for me as a creator but also for the business, to realise its investment, and this multi-window strategy is helpful,” she says.

“What we’ve seen in the Nordics is very interesting. The Nordics is one of the most advanced markets in terms of SVoD users and moving away from pay linear platforms, and the Nordics team was very much ahead of the curve, even within Viacom, in recognising this and adapting to that market reality. So this

gives us a terrific pilot, showing what the rest of the world may look like in future.”

A peek of that is the fact that NRK no longer commissions drama for linear slots. “For streaming, you need new content to attract people and get them to look at it, and NRK’s directors have prioritised drama as the most important genre on the player. It’s a lead-in to the player,” says NRK’s Ivar Køhn.

One of the consequences is that NRK no longer commissions drama for specific linear slots: “We publish as we think best for the project, not for a slot. We produce drama because of its quality and to reach a specific

target group, and that’s great because we’re no longer making drama to fill slots.”

**Opportunities:** Developers, producers and distributors need to be aware of the new requirements that channels now have. For them, it’s no longer about winning a slot but recouping outlay in what used to be referred to as “the long tail” as well. Some channels are now even looking to acquire shows that don’t go on their linear channels but just their sister OTT services, where they’ll stand a better chance of reaching the intended audience.

**10. Linear schedules are now part of a larger ecosystem, as broadcaster strategies evolve to accommodate the shift to on-demand viewing. But as the main shop window for content for a majority of viewers, linear opportunities remain.**

With broadcasters needing to innovate and refresh schedules to stay ahead, there are big rewards for the right weekend primetime entertainment format, factual entertainment and drama projects.

The key pillars are early evening slots for gameshows and soaps, weekend primetime entertainment slots and event drama slots, along with weekday documentaries and factual entertainment.

This year saw Spain’s Antena 3 embark on a new entertainment strategy spearheaded by La Voz (The Voice) in an attempt to offer more entertainment formats to attract audiences – and advertisers – to its linear schedule.



La Voz (The Voice) led Antena 3’s new entertainment strategy

In Sweden, TV4's Fredrik Arefalk says the broadcaster looks for the best ideas, "whether it's a format coming from outside or an original Swedish idea."

A major primetime entertainment launch this year for TF1 will be local version of Korean format *The Masked Singer* from MBC. Already adapted internationally by Endemol Shine for Fox, which premiered it this January and has ordered a second season, the French version is being made by independent prodco Hervé Hubert.

"It's an optimistic, feel-good show with a lot of humour and self-mockery as well as mystery, as it includes an investigation aspect, with clues provided in the shows. It's quite innovative," says Bailly.

The broadcaster has also been looking to innovate in its early access primetime zone, including holiday competition *Les Plus Belles Vacances*, which was renewed.



Amazon's upcoming James May – Our Man In Japan

Back in the on-demand world, with unscripted developing apace, execs like Amazon's Georgia Brown are keen to invite ideas for innovations in that space. She has just greenlit the streamer's first UK unscripted original travelogue, James May – *Our Man In Japan*, featuring one of the presenters of *The Grand Tour*.

**Opportunities:** Despite the ongoing drama boom, there is tremendous demand for unscripted programming at the moment. However, vendors need to bear in mind that the dynamics of the market are changing fast, as the

number of format sellers increase sharply and the pressure to snap up hot IP diminishes. Once upon a time, the format business was all about speed to market and rolling out your IP as fast as you could to avoid copycats and me-too shows reaching the screen before your original format.

Nowadays, things are happening a little slower. Data from research outfit The WIT reveals that the five most licensed formats from 2018 accrued 35 local adaptations between them in that year, whereas the five most licensed formats from 2013 had 64. Format roll-outs seem to be slowing down as buyers become more selective about their acquisitions.

---



Turkish novela *Fatmagül* from *Ay Yapım* was a surprise hit for Atresmedia

## Atresmedia – Spain

Atresmedia is consolidating its Turkish content and preparing to launch scripted formats. Gün Akyuz reports.

### Overview

The most surprising trend for Atresmedia in 2018 has been its gamble with acquired Turkish telenovelas, says head of content acquisitions and sales Mercedes Gamero.



Mercedes Gamero

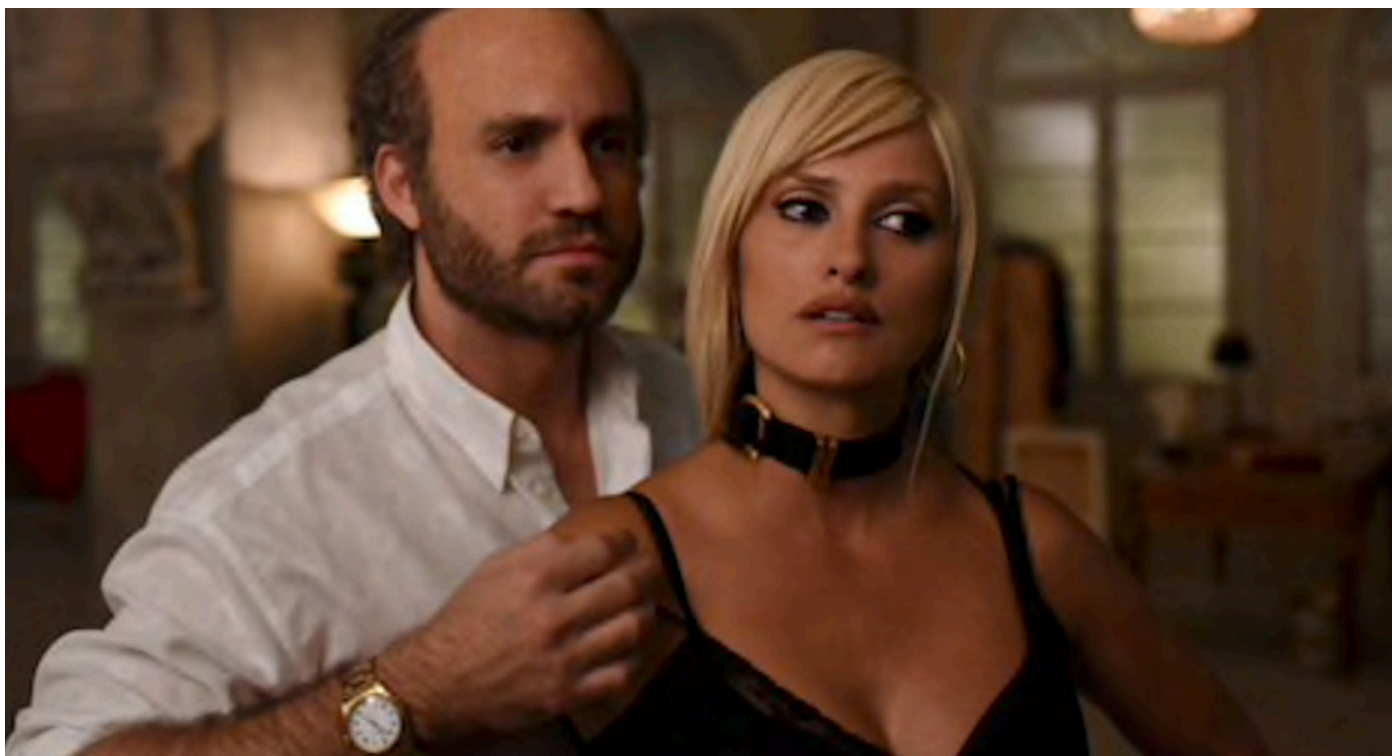
The deal, which was initiated at Natpe Miami, took two years to negotiate, she says. “When we put [Ay Yapım’s] *Fatmagül* on air it was such a breakout hit that right now, for example, Mediaset is also buying Turkish telenovelas.”

Gamero’s acquisitions brief covers Atresmedia’s two generalist channels, flagship A3 and laSexta, plus its secondary channels Nova, for female-skewing shows and telenovelas; Mega, for factual content; Neox, for US scripted and animation; and fiction channel Atreseries. She does not oversee entertainment formats, which are handled directly by the entertainment department.

### Current programming, drama, acquisitions, formats

Digital channel Nova has been the traditional rendezvous for telenovelas since the channel’s launch. But with Latin American telenovelas moving increasingly into more local themes, Gamero says they’re no longer relevant to Nova’s audiences.

“Traditional telenovelas from suppliers like Telemundo have been changing



**The Assassination of Gianni Versace: American Crime Story on Antena 3 as an event series**

from traditional plots and topics into ‘narconovelas,’ such as *Senor del los Cielos*. Those really don’t work for us; the narco theme is not our thing over here and is quite distant from our culture. That’s why we started looking elsewhere,” she explains.

Switching to Turkish telenovelas was originally a risk but has paid off handsomely. “At the end of the day, they talk about universal themes, which are very similar to the Latin telenovelas but have higher production values,” says Gamero, citing other features, such as fewer episodes, faster pacing, stories and plots that are not as stretched as in the Latin novela, and the fact that they’re a little different. “They’re not Latin so come across as a little bit exotic, but is appealing at the same time,” says Gamero.

Gamero firmly believes the trend will continue and has so far acquired eight Turkish telenovelas, most recently *Elif*, from Fatmagül producer Ay Yapim, in a deal with Echo Rights. “That’s a lot, but our competitor is now doing the same, so we had to strengthen our position in the market,” she says.

Nova airs two telenovelas at any given time, one in primetime and one in late afternoon or early evening. Now airing are Turkish telenovelas *Ezel*, *Sila* and *Amor de Contrabando* (Black Money Love), in a block from 19.00 to 23.30.

Nova continues to air Latin American telenovelas, largely sourced from its volume deal with Televisa, and it still acquires single titles from Telemundo. But Gamero says she also meets with suppliers such as RCN and Caracol at markets for opportunistic purchases. “Usually they don’t fit as well. For example, RCN usually has more musical and comedy telenovelas, which don’t travel that well.”

Gamero has also looked further afield, including at Korean series. “We’re not brave enough yet and we don’t know if the audience would be prepared for them,” she comments, but adds that she would have liked to secure the US version of Korean series *The Good Doctor*.



Emmy-winning crime drama *La Casa Del Papel* (Money Heist) debuted in 2017

Atresmedia is also eyeing scripted formats and has already picked up a couple. One of them is an as-yet undisclosed Turkish telenovela, with the deal still being finalised. The other is Argentinian drama *Amar Después de Amar* (Love After Love), which has already been adapted by Mexico's Televisa as *Caer en Tentación*, while a US version was put into development by NBC in 2017.

Additionally, Gamero regards Natpe Miami as an important meeting point to secure mid-season US dramas launches. In 2018, it landed *The Assassination of Gianni Versace: American Crime Story*, which aired on Antena 3 last spring as an event. The channel no longer offers regular slots for US series, instead cherry-picking the right foreign project to schedule as a primetime event. Penelope Cruz's role as Donatella Versace helped promote the series. "We just pick up US series we think we can promote as an event, like with Versace," says Gamero.

Another was season one of *The Handmaid's Tale*, which first-windowed on HBO España. "At the time we thought it was something brave. It's not an easy show for free TV," says Gamero. It premiered on free-to-air Antena 3 in the low summer season when local productions are off air, which proved successful. "Now the audience is more mature and getting used to watching more high-brow fiction," she observes.

Waiting in the wings is Warner Bros' supernatural drama *Manifest*, destined for a primetime slot on Antena 3 some time in the first quarter of 2019. "It has a high concept element you could also promote as something different," Gamero says.

The priority for Antena 3 is one-off events of between six and eight hours, says Gamero. "As the market is very cluttered right now, the audience is less willing to commit to ongoing seasons. People would rather discover something brand new and fresh than come back to subsequent seasons of something they've seen a year ago."

Fresh event content is delivering numbers for free TV. "Look at *Bodyguard*



**Bambú Productions'** upcoming *45 Revoluciones* is set in the 1960s

in the UK," says Gamero. "At the end of the day it's not very original but it's riveting and captivating, and really works. We would pick up something like that – a six-part one-off that's very bingeable."

Gamero says Atresmedia considered the BBC drama but passed on it. "The last three episodes were too centred on UK politics rather than the human side of the story," she says.

The flagship channel is also home to an established TV movie block at weekends, from 16.00 to 20.00. Gamero says she buys a lot of French and German TV movies for it.

Elsewhere on the acquired scripted front is Atresmedia's younger-skewing channel Neox, home to a large inventory of mainly US-driven sitcoms and animation, such as *The Simpsons*, *Modern Family*, *The Big Bang Theory*, *Two and a Half Men*, even *The Fresh Prince of Bel Air*.

"This kind of stuff works well," says Gamero, noting new shows are regularly acquired for the line-up, and the US remains a key source. "It's pretty difficult to find that kind of stuff in Europe," she says, commenting that Spanish audiences are more used to US than, say, German humour.

While Gamero says there's plenty of drama production for buyers, Atresmedia would be cautious about entering into pre-buys for well-known properties, given the deep pockets of OTT heavyweights like Netflix and Amazon.

"It's difficult to put in the table something that can compete with what OTT offers," she says. "It's very risky for a free channel that has to be very careful about what it's offering its audiences. Most of this stuff is more oriented towards pay TV. Right now, in terms of their storytelling, they're trying to be more complex and edgier. They ask for so much money, I would say only OTT platforms or pay TV platforms can afford to pay without screening them, just by reading a script."

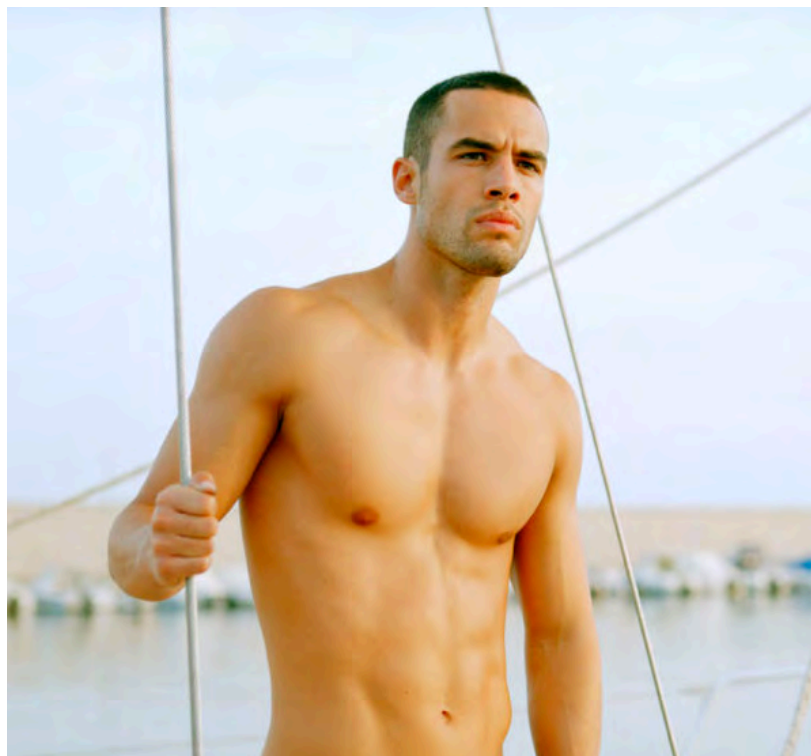
Atresmedia was an early buyer of *Game of Thrones*, before the drama even



launched on HBO, says Gamero. “But at the time, before OTTs existed, it was easier. Right now it’s very difficult, also because you buy on a single-territory basis against someone who buys the universe.”

### Original production

Gamero played a role in Netflix picking up Atresmedia’s Emmy-winning crime drama *La Casa Del Papel* (Money Heist). The series first ran on Antena 3 in 2017, before Netflix acquired it for global release. The streamer is also set to release a third season. “I pitched the drama to Netflix for the first time at Natpe two years ago,” says Gamero, who highlights the first-look volume deal that now exists between Netflix and Atresmedia for its drama slate.



Thriller *Toy Boy* is produced by Atresmedia Televisión with prodco Plano a Plano

Atresmedia develops around 15 series for the main channel annually, with around six making it to air. In January, the fifth season of sitcom *Allí Abajo* (Down Below) will launch in Antena 3. A new thriller series, *Toy Boy*, produced by Atresmedia Televisión in collaboration with prodco Plano a Plano, will follow. Also in the pipeline is period drama *45 Revoluciones*, set in the 1960s and made by prodco Bambú Productions (*Love in Times of War*, *Grand Hotel*, *Velvet*).

### Factual, acquisitions

On the factual front, key sources of programming for male-skewing channel Mega are Atresmedia’s deals with A+E

Networks and National Geographic. The channel relies mainly on acquisitions, with local production largely confined to its sports magazine output. Gamero says opportunities also exist for the occasional single deals with smaller suppliers.

Trends in the factual space haven’t changed much, observes Gamero. “It’s been more conservative, in a way. We get a lot of stuff from A+E, like *American Pickers*, which really works well for us on Mega,” she comments. Shows like *Pawn Stars*, *Mountain Men* and *Swamp* still work well, with *Pawn Stars* and other franchises around pawn top drivers for the channel. “A+E’s factual storytelling is very easy watching. The shows repeat very well and people don’t seem to get bored of watching them again,” she says.

Ultimately, Gamero believes viewers will be increasingly looking for comfort TV and feel-good escapism over the next year, as an antidote to the prevailing climate of divisive politics and extremism. “More and more they want to see a ‘human factor’ in storytelling across factual or fiction. That element is important right now so that people can really relate to characters and storylines, and share that human factor with the characters on screen,” she says.



Perdonas Nuestros Pecados (Forgive Us Our Sins) has travelled well in Latin America

## Mega – Chile

Chile's Mega is expanding its scripted strategy and looking for more international partnerships. Gün Akyuz reports.

### Overview

Mega's leading position in the Chilean landscape over the past four-and-a-half years is largely down to its fiction strategy, says Juan Vicente, director of content and international business.

The commercial channel's 38% all-day average viewing share climbs to 42% in primetime and can hit 50% in its afternoon telenovela slot at 15.00. "That's a lot in a very competitive market of four TV stations, all producing local content, and we're winning in every timeslot," says Vicente, who oversees the broadcaster's programming and acquisitions.

A welcome development for Chilean players like Mega as well as firms across Latin America is that viewers in the region are now more open to stories from different countries and cultures, according to Vicente. "Borders and frontiers are falling, and this is happening globally. It's been building over the past few years but it's getting stronger," he says, pointing to the increasing number of platforms on which viewers can watch content thanks to the growing presence of digital and OTT operators like Netflix.

"We have to be on that stage, in terms of producing quality, but it's mainly about content engagement with the audience," Vicente adds, highlighting Mega's evolving content strategy.

"We're a telenovela-producing TV broadcaster and, with three telenovelas a day, we're also by far the largest content producer in the country."

It was also Mega and Vicente who first put Turkish telenovelas on the map in Latin America four years ago. Mega has already taken its content activities beyond Chile and is keen to expand its presence through more partnerships.



Juan Vicente



**Globo's Querer Sin Límites (Love Without Boundaries) was a hit for Mega**

The broadcaster fields a large in-house production division with about 600 staff, many of them working in fiction. "We have a fantastic department with lots of talent," says Vicente, highlighting the country's decades-long history of fiction production, plus its rich storytelling heritage and skilled writers.

### **Current schedule, original production, drama, formats**

Alongside four hours of daily newscasts and popular longform morning magazine *Mucho Gusto*, Mega's slate of in-house telenovelas is a key programming pillar. Three are stripped across the week in different timeslots: afternoons at 15.00, access primetime at 20.00 and primetime from 22.00.

Vicente says that while telenovela love stories still work best on Mega, the shows' background plots vary depending on their timeslot.

The classic telenovelas air in Mega's female-oriented afternoon slot at 15.00. The access primetime slot changes gear to focus on more family-oriented fare with romantic comedy drama. Currently on air is *Isla Paraíso*, which launched in October. The story centres on a town whose women have all departed, leaving the men to cope on their own – with disastrous results. "We're also trying to appeal to teenagers, so there are a lot of teenage characters in the story, as well as senior citizen characters to appeal to that audience," explains Vicente.

In the primetime slot, telenovelas target co-viewing adult couples, once kids have gone to bed. "We're Latin Americans so there's always a love story in there, but it's more action- and thriller-oriented," the exec notes.

According to Vicente, thriller stories with a love interest have been the growing trend across Latin America over the past year. "That's the start as the narco stories are not doing as well as they were a couple of years ago," he says of the formerly popular drug dramas. But shows like *Perdonas Nuestros Pecados* (*Forgive Us Our Sins*) are also doing well. "Those are the kinds of stories that are really able to travel fast and cross borders in Latin America."

Mega has also begun to adapt telenovelas sourced from elsewhere in Latin America to help broaden its storytelling. A year ago, it localised Telefe's *Sres.*



**Anne (Mother) is based on a Nippon TV format**

Papis (Mr Daddies), and Vicente says it has since acquired a further two shows from Argentina and Colombia. “We’re always looking into the market for good stories we can bring to our culture and adapt as a telenovela.” Mega is also eyeing Turkish telenovela formats, “something we really want to do,” he adds.

### **Acquisitions**

Turkish telenovelas are already a staple in Mega’s afternoon grid alongside its volume content deal with Brazil’s Globo, which meets around two-thirds of its acquisition needs.

“We have an excellent relationship with Globo and its content is very successful for us,” says Vicente, citing recent examples like *Querer Sin Límites* (Love Without Boundaries). Re-runs of *Avenida Brazil* also perform well, he says.

Mega’s acquired fiction mainly airs in a four-hour afternoon block from 16.00 to 20.00, leading out from the local telenovela slot at 15.00. Another slot, at 23.30, usually features a Turkish title.

Demand for Turkish telenovelas remains as buoyant as ever. Since debuting the hugely successful *1001 Nights* (Binbir Gece) back in 2014, Mega has aired almost 25 other Turkish telenovelas, all of them performing well, says Vicente.

The broadcaster recently finished airing *Anne* (Mother), based on the original Nippon TV scripted format, which is distributed by Global Agency. It ended nudging a 39% audience share in the late-night slot, with Vicente putting its success down to the central theme – homeless children and foster parents – connecting with Chilean viewers. “There’s a huge national conversation about this kind of situation across the country that helped us with the telenovela,” the exec notes.

Mega’s latest Turkish drama acquisition is *Kizim* (My Daughter) from prodco Medyapim, featuring Anne star Beren Gokyildiz.

Vicente points to three key factors keeping Turkish telenovelas on Mega’s



Mega's latest Turkish drama acquisition is Medyapim's *Kizim (My Daughter)*

schedule. First, many of their shows focus less on social class ('rich man meets poor woman' stories, for example) than their Lat Am counterparts. "With the Turkish telenovelas, the conflict and the love story is an ethical one. That's the main reason behind their success," says Vicente.

The second, he says, is that Turkish people "look like us. You could imagine them in Mexico, Chile or Argentina and we can fall in love with them."

Third, while most Latin Americans are Catholic and Turks Muslim, both groups' views on family and relationships are very similar.

There's also plenty of choice. "Turkey has a very competitive market. There are eight main TV stations all producing local fiction, with high production values and great acting, so there are a lot of stories coming out of there," says Vicente. "We're not serving the same plate of food with every Turkish telenovela – it could be a love story, a more thriller-oriented one, or a more relationship-based one like *Mother*. We're always trying to change the focus."

Mega has already made its first attempt to cross-fertilise Chilean and Turkish telenovelas in the shape of recent 22.00 title *Perdonas Nuestros Pecados*. The show featured music by Turkish composer Tolga Işıklı, who wrote the soundtrack for Turkish programmes such as *Fatmagül*. Season two of the telenovela ran from April to August 2018, pulling in a 42% audience share and successfully bringing "the emotion from Turkish stories into Mega's productions," says Vicente.

"Now we want to coproduce and we're talking with leading producers in Turkey about how to make this work," he adds. With talks in the very early stages, no details were available at time of writing.

Such plans are unlikely to affect Mega's current acquisitions strategy, Vicente says. "We're not only trying to focus on our local screens, we also want to take stories to other countries that we can produce and help develop. Hopefully those stories can travel around the world like the Turkish drama. We'll be going step-by-step, as it's a big investment and we're testing new waters."



Isla Paraiso centres on a town whose women have all left

Vicente says Mega is always open to new ideas and stories. In particular, it wants stories that connect with viewers on an emotional level. “The truth is, you never know where that story is,” comments Vicente. “No one has the golden ticket to what will or won’t work. It doesn’t work like that with content. We’re open to hearing about stories that can connect to the audience, to seeing what’s around and to seeing if we can bring it to our audience.”

Mega always considers acquisitions from other countries beyond its deals within Latin America and Turkey. It has picked up several titles in the past from Spain, such as El Internado and El Barco. However, Vicente says it hasn’t found anything suitable in the past couple of years. “We have found great stories, but they only have eight, 10 or 12 episodes, and we can’t air them because we’re telenovela guys,” he explains. “We need at least 60 episodes, and it’s difficult to find a place that has good production values, great connecting love stories and with more than 20 episodes. It’s a combination that’s not easy to find.”

Mega is already exporting its fiction titles as finished tape and formats through its recently launched distribution joint venture Mega Global Entertainment. Most sales are within Latin America but last November Greek channel ANT1 picked up format rights to romantic comedy Pituca Sin Lucas, with plans to adapt Telemundo’s version of the Mega original.

“We want that to happen more,” says Vicente. “We believe we have great stories with the power to travel. Some of our main assets are scriptwriters and the stories that come out of Chile.”

Mega already has a couple of Latin American copros in the works: a fictionalised biographical series about celebrated Chilean writer Isabel Allende (The House of the Spirits, The Stories of Eva Luna), together with Sony; and thriller 12 Seconds, with Argentina’s Telefe and Peru’s América TV.

---



A second season of family drama *Lykkeland* is in the works

## NRK – Norway

NRK drama chief Ivar Køhn discusses the pubcaster's evolving drama strategy and current priorities. Gün Akyuz reports.

### Overview

Norwegian pubcaster NRK has put itself on the global map several times thanks to an ever-evolving drama strategy.

The pubcaster produces and commissions around 18 series a year, including shows for child and youth audiences, and partners on a similar number of coproductions, all to feed its growing online player. The result is a significant crop of between 35 and 40 new scripted titles a year, according to NRK drama chief Ivar Køhn.

That's no mean feat for a pubcaster in one of Europe's smallest countries. NRK's current drama strategy and output are the products of a prescient decision made a few years ago to direct investments online and beef up its digital platform, led by original drama, which has seen a virtual doubling in its budget over the past two years.

"It was a strategic decision to move more into VoD and the streaming platform," says Køhn. "For streaming, you need new content to attract people and get them to look at it, and NRK's directors have prioritised drama as the most important genre on the player. It's a lead-in to the player."

This doesn't mean linear won't still be there for many more years, he adds, but the competition and audiences are fast moving towards a streaming world in Norway and the Nordics in general.

NRK's most recent crop includes *Magnus* (6x30'), which launched in early January. The sci-fi/crime comedy-drama, made by prodco Viafilm, was shot in both Norwegian and English. It comes from the creatives behind *Lilyhammer*,

Anders Tangen and Geir Henning Hopland, and features a storytelling style similar to the NRK and Netflix series. Last autumn's big show was state-of-the-nation family drama *Lykkeland* (State of Happiness). Written by Mette Bølstad, a second season is now in the pipeline.

This February, meanwhile, saw season two of football drama *Heimebane* (Homeground, 8x50'), produced by Motlys. Season one was NRK's most streamed series last year.

Køhn says linear audiences for NRK's big dramas have fallen to 40% of what they attracted four or five years ago, and gathering the same numbers on the streaming platform takes longer. "I would have expected a big show like Homeground to attract 1.2 million viewers. When we screened the first episode of the first season, we attracted 450,000," he says. A year later, the show has surpassed one million viewers in total. "It's harder to see what success is. It takes time and it's a different way of measuring success," Køhn adds.

Crucially, NRK's online focus has been accompanied by new rights-sharing and windowing arrangements for its productions, which range from in-house and external commissions and coproductions with Norway's independent sector to international copros.

Køhn says short licence periods – typically covering a premiere, three weeks' catch-up and a couple of reruns over a period of two to four years – have been replaced by rights in perpetuity for NRK's own shows and between seven and 10 years of unlimited publishing rights across linear and VoD for drama coproduced with Norwegian companies.

"If we want to compete in the new reality of the TV industry, we have to have different kinds of rights," the exec says. "What's important for us is that we can show Norwegian drama on our player for a very long time, maybe forever. If it's not possible to see the drama we produce on our player, it has no value for us."

Extended rights and a long-tail drama catalogue have changed the game for NRK, says Køhn. It currently spends just over €30m (US\$34m) across in-house and coproduced drama and some acquisitions, which Køhn says is probably the biggest drama budget

among Nordic pubcasters at present.

Now the largest streaming platform in the Nordics, Netflix is present in around 80% of Norwegian homes, says Køhn. NRK may have given Netflix an early entry into the local market with *Lilyhammer*, but the battle lines are drawn somewhat differently today. NRK requires exclusivity for its own player and further coproduction alliances with the US giant now seem unlikely.

"We will coproduce with anyone, but they won't get any window in the Norwegian market," says Køhn. "If we coproduce with an international streaming platform, they will get Nordic rights excluding Norway."

"If we put most of the money into the productions, it's important for us to retain exclusivity. These days, the competition is to be one of the two or three platforms people access, and for a public broadcaster on a public streaming platform to survive in the future, it's really important to protect the platform and make it one of the go-to destinations."

The choice now available to viewers in the region has raised the stakes for local broadcasters like NRK. "People are choosing between HBO, Netflix,



Ivar Køhn



NRK and Viaplay. They choose the drama they want to see and if they're not satisfied, they don't stay for the second episode," says Køhn. "So the challenge is to keep the quality from episode to episode and make people pick it every time."

While Køhn says NRK won't be able to compete with bigger international streamers in terms of sheer numbers of new shows, he notes: "As a public broadcaster, we can try to compete in terms of quality and local relevance. As a national pubcaster, you want drama to be the glue in society. It's the thing that connects people, that they talk about and that creates common experiences, and that's the advantage of local pubcasters over streaming companies."

### **Current programming, original production, drama**

Hand-in-hand with the pubcaster's online push, Køhn says NRK no longer commissions drama for specific linear slots: "We publish as we think best for the project, not for a slot. We produce drama because of its quality and to reach a specific target group, and that's great because we're no longer making drama to fill slots."

NRK's 35 to 40 new titles a year range from two or three high-budget (€12-15m) mainstream dramas to more cost-effective titles aimed at specific demos. This includes mainstream comedy-driven projects such as *Magnus and Norsemen*, plus a few in-house sitcoms. It also includes shows coming out of NRK's membership of N12, the coproduction initiative from Nordic pubcasters' group Norvision. The group has committed to creating 12 Nordic dramas together every year, with NRK selecting and leading on three projects and securing rights to the other nine selected by the region's other pubcasters.

Køhn says NRK's drama output will be maintained at its current level, which is fed by a development slate of up to 80 projects across all departments.

Rising budgets pose a perennial challenge to small broadcasters like NRK,

**Financial drama *Exit* comes from Fremantle Norway**





**Football drama**  
**Heimebane entered its**  
**second run in February**

with Køhn revealing that budgets have increased by 100% over the last 10 years in Norway. “A few years ago, €5m was a very high budget; now, it’s not unusual for producers to approach us with budgets of between €12m and €15m,” he says.

While rising budgets have increased the quality of dramas, they have also made coproduction a growing necessity. “To continue to maintain this number of productions, we need to find ways to keep the quality and make it as effective as possible as a production,” Køhn says.

Cue *Skam*, NRK’s biggest success of the past few years, and also its cheapest drama ever. “We also know perfectly well – irritatingly so – that there was no connection between the budget and the quality of the project,” comments Køhn. “We’re looking for several solutions: very smart new ways to produce big drama and new ways to fund productions through international financing.”

This has led NRK further into new international financial coproduction models. “It’s a new situation for us, but at least for our big productions we should try to get international financing,” says the exec. Among these big shows is eight-part Second World War drama *Atlantic Crossing*. Starring Sofia Helin (*The Bridge*), the series is produced by Norwegian prodco Cinenord, with Beta Film handling global sales.

Køhn is keen for NRK’s drama slate to offer more than just the crime, noir and suspense stories that play well internationally. Its major forthcoming projects, which were presented at *Séries Mania*, include financial drama *Exit* (8x30’), from Fremantle Norway, which is due to launch in late August; and comedic crime drama *Twin*, (8x45’) a Nordisk Film Production launching in September. Further down the road is the pubcaster’s in-house-produced *22 July*, a drama focusing on the terrorist attack carried out by white supremacist Anders Behring Breivik in 2011. The 6x60’ series, which launches in 2020, has already been picked up by DRG for global distribution.

“No one else is making some of our projects for our audiences,” says

Køhn. “They’re Norwegian stories based on Norwegian history or [works by Norwegian] authors or the like, but they also need a high budget to work in Norway. So it’s a balance. We look for financing but still try to make high-budget projects within the system we have in the Nordic countries.”

NRK’s online push also dovetails neatly with the N12 alliance, as Køhn explains: “We don’t have to think about how to fill slots, and the streaming platform is more open to a range of different projects, so N12 makes it easier to coproduce and also get relevant financing for the bigger projects.”



Nordisk Film Production’s comedy crime drama *Twin*

The year-old initiative has proven “very interesting, very challenging and very demanding and a great new way to coproduce,” comments Køhn. He believes N12 will lead to more good series being financed than before its launch, when the region’s pubcasters opted into projects, with choices constrained by what suited their linear slots. But it also requires a new level of trust, he adds. “I have more trust when I talk to, say, Christian Rank [head of drama at Danish pubcaster DR], who has worked on a project for a year and says it’s a very good project. It’s better for me to trust his judgement rather than mine after a five-minute pitch.”

In addition, the initiative benefits production companies, which no longer have to go to partners in several countries for coproduction financing. “All it takes is for one of them to have a bad day and you lose everything,” observes Køhn. “This is also a way to attract the best producers to a project. They know that if they go to one of the N12 broadcasters, there’s the possibility of Nordic-wide financing.

“We can’t have shows where the producers have to ask 30 different parties to join their project if they can go to Netflix and get a single backer.”

The N12 broadcasters are now discussing how to open up the initiative to other broadcasters in Europe, adds Køhn, noting that with global streamers having to meet a 30% local content quota in the European Union, competition for local projects will intensify.

Another forthcoming NRK project is *The Hero of the Seas* (*En Sjøens Helt*, 8x45’), based on Norwegian author Jon Michelet’s quintet of books. A first season of the drama was greenlit this January. Like *Atlantic Crossing*, it is also a WWII drama, but this time the focus is on the people who transported oil and petrol between the US and England as part of the war effort. “Most Norwegians who died during the war were seamen,” notes Køhn.

It’s also NRK’s most expensive drama project yet, costing NOK180m (US\$21.1m), a third of which has been contributed by the pubcaster. Produced by John M Jacobsen and his prodco *Filmkameratene*, the drama is due in 2021 or 2022. The N12 project is looking for additional partners, says Køhn.

---



Daily drama *Demain Nous Appartient* is rerun late at night

## TF1 – France

France's leading free-to-air broadcaster TF1 is pushing further into new territory on the drama and entertainment fronts. Marie-Agnès Bruneau reports.

### Overview

Despite increased competition, France's free-to-air (FTA) market leader TF1 held its place, growing 0.2 share points to 20.2% of all viewers (four-plus) in 2018, driven by the huge success of the Fifa World Cup, which pulled in over 19 million viewers and an 82% share for the final, which the French side won.

A tougher advertising climate has seen TF1 Group introduce a new strategy, reworking its channels offerings to create more efficiencies and better advertising targets while maintaining its leadership.

The group's combined share of all viewers fell marginally to 27.6% (down 0.1 points) over the year, with DTT nets TMC, TFX and TF1 Séries Films' shares down to 3%, 1.9% and 1.8% respectively. However, the group significantly improved its share in all advertising targets, including younger demos, and news channel LCI's share rose to 0.7%.

"2018 was a year of transformation," says Fabrice Bailly, head of programmes and acquisitions at TF1 Group. "Last year, we rebranded our younger-skewing channel TFX and [scripted net] TF1 Séries Films channels and managed to strengthen TMC thanks to shows such as *Burger Quiz*. The channel now also welcomes sports.

"Our multi-channel strategy has paid off – 2018 was the third consecutive year we improved our market share in advertising targets, reaching a 32.6% share in the key demo of main household shoppers women under 50, where we managed to strengthen our leadership and widen the gap with our nearest competitor by 17%."

Last year, TF1 scored with its original dramas, as well as with hit acquired



Fabrice Bailly

US series *The Good Doctor*, two areas that are also proving very popular in the on-demand world. The channel took a gamble with the launch of daily drama *Demain Nous Appartient* at 19.20, which has now paid off. Elsewhere, the group generated an entertainment hit with French comedy gameshow *Burger Quiz* on TMC, attracting between one million and 1.5 million live viewers in primetime, peaking at 2.3 million including catch-up – a record figure for a DTT channel.

The French TV market is now a more challenging landscape for traditional broadcasters, which face both linear audience fragmentation and a rapidly growing on-demand viewing that dents primetime audience figures in particular, while streaming platforms such as Netflix are increasingly attractive to French audiences, especially younger ones.

“Our online catch-up service recorded 1.4 billion views last year. That’s a 10% increase on the previous year,” says Bailly. “On-demand use changes many things for us, not so much for one-offs but for series, because of the way they can build audience loyalty.

“Catch-up is a loyalty marker. For instance, our daily series *Demain Nous Appartient* did not perform well on Christmas Eve, but picked up one million viewers in catch-up, or 35% of the episode’s audience.”

### **Current schedule**

TF1 makes a point of maintaining a diversified slate in primetime, including two French drama strands, two for US series, two entertainment slots and one for Sunday movies, making the schedule easily identifiable to viewers.

“We’re strong in all genres, including US series, which now all get over five million viewers,” says Bailly. “The landscape is extremely competitive and is getting more so, but no other channel can afford the sports events we have, or our levels of drama, entertainment and the like, and that distinguishes us from the competition a big way.”

**Les Bracelet Rouges is  
TF1’s adaptation of  
The Red Band Society**





### Local comedy gameshow Burger Quiz airs on TMC

As the landscape becomes increasingly complex, he says the broadcaster tries to “make sure we keep our audience in mind, and think how we can offer the most flexibility and comfort with our MyTF1 service. Demain Nous Appartient is also rerun late at night and in the morning.”

TF1’s multi-channel strategy also includes repeat scheduling to maximise its content exploitation. For instance, French blockbuster comedy movie *Qu’est-ce Qu’on a Fait au Bon Dieu?* attracted a massive 8.5 million viewers (33% share) live in its first FTA run on TF1 last December. It was re-run two months later on smaller sibling TMC, attracting a further 2.9 millions (14% share), giving the channel another audience record and helping it to rank second in the ratings that evening.

“An important continuing focus this year is to not cut ourselves off from young audiences,” says Bailly. “Demain Nous Appartient and primetime series *Les Bracelet Rouges* – the French adaptation of *The Red Band Society* – are two very strong shows among the 15-24 and 15-34 demos. Through shows such as talkshow *Quotidien*, *Burger Quiz* and *Palmashow*, TMC is developing as a channel that attracts new talents.”

### Original production, entertainment, factual, formats

The channel’s top-rated brands, *The Voice* and *Koh Lanta*, have dipped, although they remained very popular last year. The channel revamped *Danse Avec Les Stars*, including the arrival of a new host, renewed *Ninja Warrior* again and this year tried *Big Bounce Battle*, which won’t be renewed.

Bailly signposts a major entertainment launch this year on TF1, after it picked up the format to *The Masked Singer*, for which it has high expectations. The format was originally launched by Korean broadcaster MBC and adapted internationally by Endemol Shine for Fox, which premiered it this January and



Last year's hit drama *Jacqueline Sauvage* pulled in 8.8 million viewers

has already ordered a second season. The French version is being made by independent prodco Hervé Hubert.

"It's an optimistic, feel-good show with a lot of humour and self-mockery as well as mystery, as it includes an investigation aspect, with clues provided in the shows. It's quite innovative," says Bailly.

Alongside international formats, TF1 has also been more active in launching new French shows, such as ALP's 'celebrities in the wild' primetime special *L'Aventure Robinson*. The channel also tried several factual entertainment shows in its early access primetime zone, including holiday competition *Les Plus Belles Vacances*, which was renewed, and an attempt at an original Christmas gameshow special.

The group was also active in launching new shows on its DTT channels, with the successful reboot of shiny-floor comedy gameshow *Burger Quiz*, which originally launched on Canal+ 15 years ago and was modernised and adapted for primetime.

"We have introduced a new dynamic with a mix of format relaunches and new ones," explains Bailly. In January the channel relaunched *Qui veut gagner des millions?* (Who Wants to be a Millionaire?) as a primetime special, for instance, and following good audience figures, is now considering commissioning it for early access primetime as the lead-in to *Demain Nous Appartient*. "We are currently rethinking our early access zone and don't exclude bringing back this gameshow as part of it."

A major format reboot this year will be *Je suis une Célébrité, Sortez moi de là!* (I'm a Celebrity... Get Me Out of Here!). "It's an upgraded version of the one we ran years ago and it does very well in the UK, Germany and Australia," Bailly comments. "This format fits what we are looking for, as it's a mix of comedy, adventure and game. Overall, we're looking for shows that promote kindness, pleasure, togetherness and sharing, with a good deal of humour."



**TF1 sought to move back into crime drama with Balthazar**

### **Drama**

TF1 was largely successful with its new French drama launches last season. The channel returned to high audience numbers with its cast-driven event TV movies and two-part miniseries inspired from true stories. Jacqueline Sauvage, about an abused woman who kills her husband, pulled in 8.8 million viewers, while school harassment story *Le Jour où J'ai Brulé Mon Coeur* picked up 7.2 million (a 27% share).

TF1 also succeeded in launching a new returning hero, in the form of forensic cop Balthazar, who drew in 7.3 million viewers (28.3%). "We have sought to renew our crime series genre," Bailly comments.

Miniseries *Les Innocents*, a remake of Nordic drama *Eyewitness* also did well, with up to 7.1 million viewers, as did *Les Bracelets Rouges* (The Red Band Society), which reached 6.5 million and has been renewed. TF1 also adapted Canadian drama *Pour Sarah*, about the fate of two teenagers following a car crash.

Over recent years TF1 has been looking to modernise its drama slate and venture into new territories. "We went bolder with shows such as [female psycho-killer] thriller *La Mante* and it paid off, so we don't intend to stop there. A major project is *La Bazar de La Charité*, a passion and history miniseries, which will be our first costume drama," he says. "We also intend to venture into sci-fi."

Another important marker last year was the success of its daily access primetime series *Demain Nous Appartient*, which launched in July 2017, replacing a former gameshow strand. After an initial dip in audiences, it gradually gained viewers over the course of last year and now attracts a minimum of 3.5 million daily live viewers, reaching four million including catch-up.

"We were very conscious of losing gameshow audiences but were willing to introduce drama because it's differentiating, builds audience loyalty and the



storytelling renews perpetually. The more episodes, the more you become familiar with the characters, the more they grow, and a virtuous circle develops. It also enables us to discover new actors. In addition, it is produced by our subsidiary Newen, so we are building an asset," says Bailly.

### **Acquisitions**

At one stage US series like *The Mentalist* or *House* were top-rated fare on TF1 but in fell in popularity in recent years. Last year saw the recovery of US series thanks to the success of *The Good Doctor*, which reached up to 7.9 million viewers and shares of well over 30% among all viewers, four-plus.

The channel also scored a hit with international miniseries *The Truth About The Harry Quebert Affair*, adapted from the Joël Dicker book and starring Patrick Dempsey (*Grey's Anatomy*). TF1 invested upfront in the miniseries, which is directed by French filmmaker Jean-Jacques Annaud. The best-rated episode reached 6.7 million viewers and 23.7% overall. "Furthermore, the series was a major hit in our advertising targets," notes Bailly.

This year the channel launched US series *S.W.A.T.* to fair figures. "We also acquired the *Magnum* reboot along with NBC's *Manifest* and medical drama *New Amsterdam*, a genre in which we made our mark," Bailly continues. "We've maintained an aggressive strategy around series acquisition, buying from the LA Screenings and also getting more involved upfront, as we did with *The Harry Quebert Affair*."

### **TF1's top five shows of 2018**

*(Rank, title, type, date, slot, viewer millions, share % of all viewers four-plus – highest rated episode)*

1. Football Fifa World Cup\*, France v Croatia final, Jul 15, 17.00, 19.4, 81.9
2. Enfoirés 2018, variety charity event, Mar 9, 21.08, 10.2, 44.5
3. Jacqueline Sauvage, French drama, Oct 1, 21.13, 8.8, 33.5%
4. Qu'est ce Qu'on A Fait Au Bon Dieu?, French movie, Dec 9, 21.11, 8.5, 34.6
5. The Good Doctor (pilot ep), US series, Aug 28, 21.09, 7.9, 33.2

*Source: Mediamat Médiametrie*

*Note: \*10 matches took the top 10 places*



Cold Case: Shinjitsu no Tobira is set for a second season

## Wowow – Japan

Japanese premium pay broadcaster Wowow is broadening its range of acquired fare and partnerships. Nico Franks reports.

Japan's broadcasters and platforms have been looking for further growth through a range of international content partnerships for some time now, with premium pay broadcaster Wowow leading the pack.

By October, company had over 2.9 million subscribers, up from 2.6 million in 2013. An unexpected boost came from the nation's top tennis player, Naomi Osaka, and her heroic victory over Serena Williams at the US Open in September, making her the first Japanese player to win a Grand Slam.

According to Kayo Washio, Wowow's head of US operations, even those with only a passing interest in the sport decided to take out subscriptions to watch coverage of the tournament, which was carried on Wowow Live.

The channel, which had also recently reclaimed rights to broadcast Ultimate Fighting Championship highlights in Japan, airs alongside networks such as Wowow Cinema and Wowow Prime, and its SVoD service Wowow Members on Demand.

Around 70-80% of Wowow's schedule is made up of overseas content, a defining characteristic for a company operating in a country notoriously indifferent towards imported content.

For Washio, who moved to LA seven-and-a-half years ago to run Wowow's US operation, that has led to the acquisition of programming such as the reboot of *Twin Peaks*, *Blindspot* and *The Good Doctor* for Wowow Prime.

*The Good Doctor*, from Sony Pictures Television, has been the standout import on Wowow Prime over the past 12 months, Washio says. The medical drama, which currently airs on ABC in the US and is based on the South Korean series of the same name, stars Freddie Highmore as a young autistic surgeon who has savant syndrome and relocates from a quiet country life to join the surgical unit at a prestigious hospital.

Wowow Prime airs seven overseas TV dramas per week along with the firm's own original series, movies and documentaries. Among its local dramas is *Hokuto: The Conversion of a Killer*, which took the award for best non-English drama series at the 2018 Rockie Awards Program Competition during the Banff World Media Festival this year.

Meanwhile, as the country gears up for the summer Olympics and Paralympics in Tokyo in 2020, Wowow has also produced sports documentary series *Who I Am* in collaboration with the International Paralympic Committee.

The series, which follows the lives of top para-athletes from around the globe, is being made over five seasons up to 2020. Its second eight-part season, made by Wowow, Acrobat Film, Wood's Office, Pao Network and Kyodo Television, was nominated in the documentary category of the 2018 International Emmy Awards held last November.

International partnerships are on the rise at Wowow, which has already chalked up several coproductions with partners in Europe and the US, including Arte, BBC, HBO and WNET. Among them is 3D documentary series *Cathedrals of Culture*. The collection

of films, which includes one by director Wim Wenders, was produced by Germany's Neue Road Movies. Coproduction partners included Denmark's Final Cut For Real, Austria's Lotus Film, Mer Film from Norway, France's Les Films d'Ici, Sundance Productions/RadicalMedia from the US and Rundfunk Berlin-Brandenburg in collaboration with Arte for France and Germany.

Other Wowow partnerships include Martin Scorsese's feature-length literary doc *The 50 Year Argument*, an HBO, BBC and Sikelia production, and WNET's crowd-sourced faith documentary *Sacred*.

On the scripted front, collaborations include a link-up with Warner Bros International TV Production for a Japanese adaptation of Jerry Bruckheimer-produced CBS series *Cold Case*. A second season of the Japanese version *Cold Case: Shinjitsu no Tobira*, is currently underway.

More coproductions with international partners are on the slate, which is set to cover animated content as well as drama, but Washio is keeping details under wraps. She is open to the possibility of coproducing with the US arms of Netflix and Amazon Prime Video – both of which rolled out in Japan in 2015 – but exclusivity in Japan would be a must.

Elsewhere, other potentially pioneering genre developments are being lined up for the pay TV service. Comedy imports have always been low on the list of priorities for Washio, due to the low likelihood they would raise a smile, but the



Kayo Washio



Wowow sports documentary series *Who I Am*

exec is aiming to test the water with shows featuring diverse casts that haven't been embraced in Japan before.

"US companies really care about diversity but in Japan we are very behind, it's sad to say," she explains. "We need to open up mentally and culturally. And entertainment is a very good way of opening up people's minds."

The exec adds that such a "pioneering" move on pay TV in Japan is increasingly necessary in order to make the country's ageing population less closed off from the world. "TV series have the power to get into your heart," says Washio.

---