

# International TV Insight

Viewing trends, Audience boosters, Programming trends

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**International Sales Manager**

# Eurodata TV Worldwide

107 territories covered

**+3 billion**  
potential viewers

**5 500+**  
channels

**20 countries**  
Measuring  
audiences time  
shifted viewing

Europe  
664 M

Africa  
93 M

North America  
323 M

Latin America  
172 M

A “partner”  
panel of  
**138 000**  
households

Middle East  
64 M

Asia Pacific  
1 990 M

 Covered territories

01 Contextual **background**

02 Global vs. **Local**  
Rich **content** & dominant **brands**

03 European content  
What's **HOT**? what's **NEW**? what's **NEXT**?

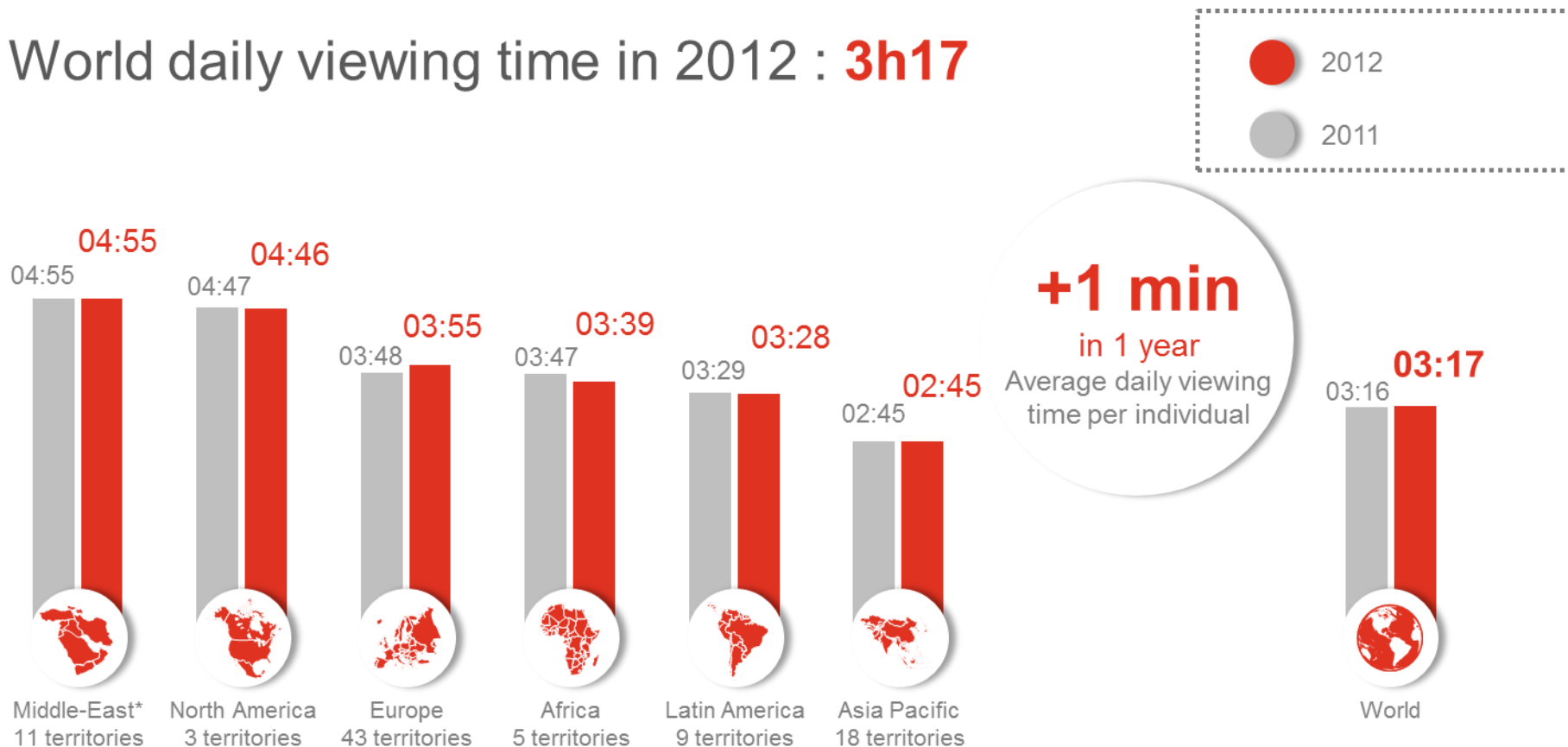
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# Contextual background

TV, still the world's favourite pastime in 2012

# Television is still growing

World daily viewing time in 2012 : **3h17**



\* In the Middle-East, only Lebanon, Israel and the United Arab Emirates have people meter systems.

# TV is the place to be for important moments

Top 2012 audiences by genre

- Entertainment
- Sport
- Fiction
- Factual

24 million viewers for both Olympic Games ceremonies in the UK on BBC1.

The Eurovision Song Contest leading the rankings of Cyprus, Estonia and Sweden.

Audience record year: 112 million American viewers watched the Superbowl.

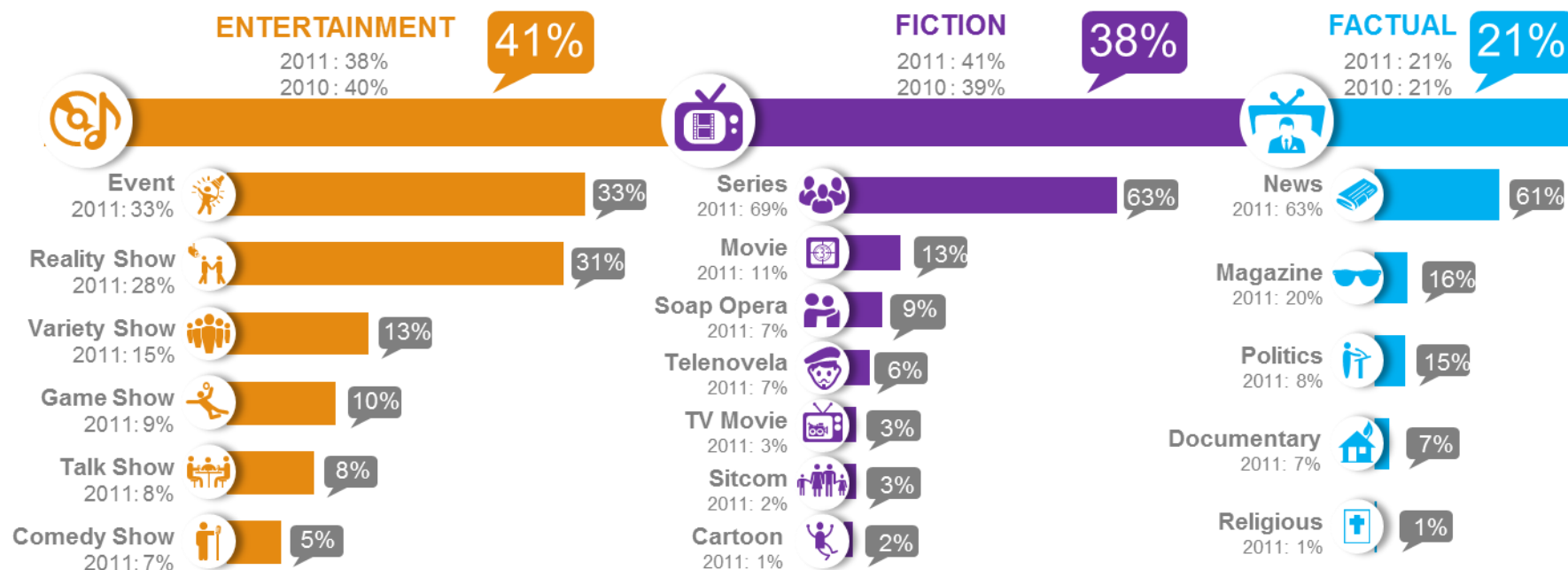
192 million Chinese viewers followed the Spring Festival on CCTV1.

Got Talent ranked as the top programme in New Zealand and Vietnam.

# Entertainment ahead again thanks to formats

## Top 10 programmes in 2012 by genre (excluding sports)

(based on the number of occurrences in %) – 71 territories included in the analysis.



# Global vs. Local

Rich content & dominant brands



## 2012 international rankings: Large domination of talent formats



Talpa Distribution



FremantleMedia



FremantleMedia



FremantleMedia



BBC Worldwide



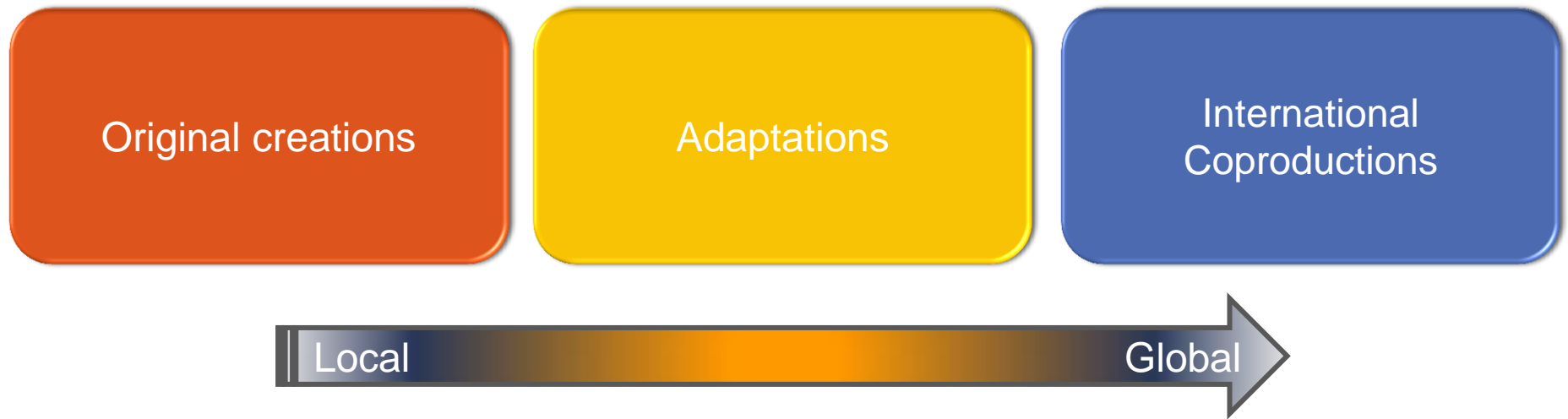
Shine International

What's next ?



Endemol Distribution

# The multiple faces of local production



## 2012 international rankings: European drama on the rise



Magnificent Century

Global Agency



Call The Midwife

BBC Worldwide



BBC Worldwide



Red Arrow International



The Box Distribution



NBCU International TV Distribution



The Bridge

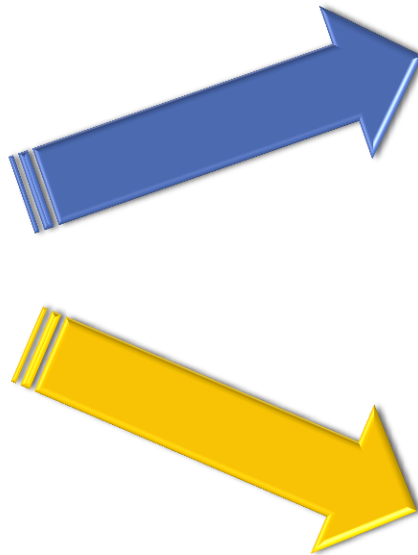
ZDF Enterprises

# The appeal of local adaptation of entertainment formats

Original creation



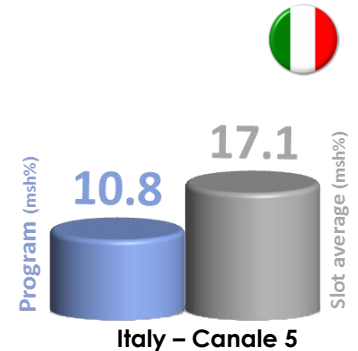
United States – ABC



Import



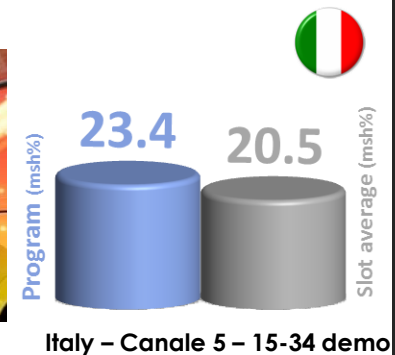
Premiere : July 2012



Adaptation



Premiere : January 2013



# Local fiction adaptations are also successful



Original creation



Roseanne (United States)



Import



SBS 6  
<4% market share

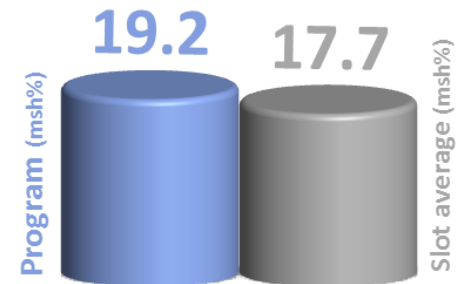
Adaptation



Netherlands



Premiere: March 2013



Netherlands – RTL4


European content  
What's **HOT**? what's **NEW**? what's **NEXT**?



# A selection of local audience boosters



Banijay International

 France  
**Touche pas à mon poste**  
(It's only TV!)

**x 3** with people 15-34  
**9,7%** vs **3,2%** for D8



Newen Distribution

 France – **Angels of reality**

**x7,5** with people 15-34

Season 5 :

**25%** vs **3,3%** for NRJ12's



Red Arrow  
International

 Belgium, with all individuals

**16,2%** vs **6,4%** on 2BE

 Quebec, with people 18-34

**+10pts** vs V's share



Filmpool

 Germany

**84%** up RTL2's share

# Mental & physical challenges bring big cash prizes & ratings



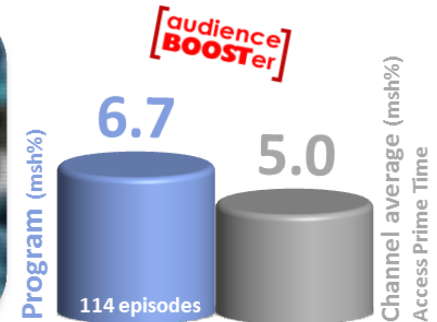
**Absolute Majority**

Banijay International

**75% up** Pro7 share with all ind.  
for the premiere



Dori Media Group



Shine International



Endemol Distribution



# Global nostalgia



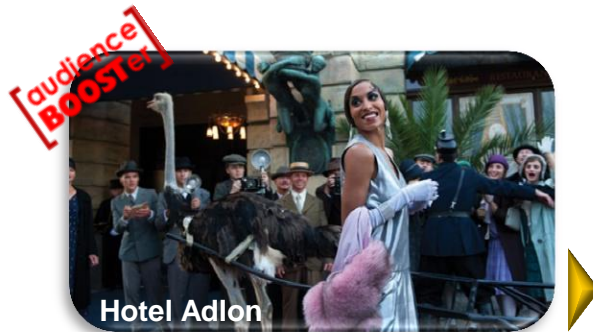
ITV Studios Global Entertainment



BBC Worldwide



Red Arrow International



Beta Film



Rise films

# Increasingly bold, dark and high-end drama



Shine International



Shine International



ZDF Enterprises



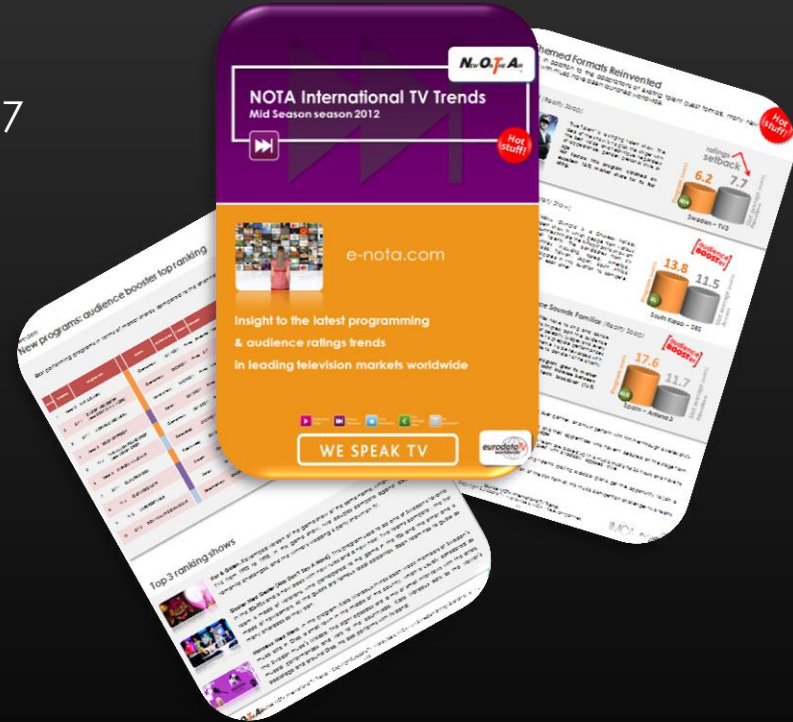
Zodiak Rights



Tandem Communication

# In a nutshell

- A world record of the daily viewing time with 3h17 (+1 min)
- Formats: bet on the power of global & local brands !
- Global positive feel run entertainment while drama allows itself to become increasingly dark.
- Game shows are under the spotlight, allowing candidates to earn a chance to win big.
- Epic stories feed viewers' nostalgia for the past.
- Drama: taking editorial risks & being bolder generally pays off.



# Thank you !

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