



Scripted Series Worldwide: Trends and Hits in Fiction

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US fiction, still on top

The competition is heating up

The rise of adaptations worldwide

Pushing back the boundaries

A few years ago, while audiences of reality TV programmes significantly dropped, fiction struck back and US scripted formats such as *Lost* and *Desperate Housewives* took Europe by storm, becoming international hits within a few months. Today, local fiction strikes back, and co-productions increasingly appear to be the best way to offer high-quality series destined to be broadcast in as many countries as possible.

If original creations are still critically acclaimed, local adaptations seem to be the new key to secure high ratings. But success isn't always up to expectations.

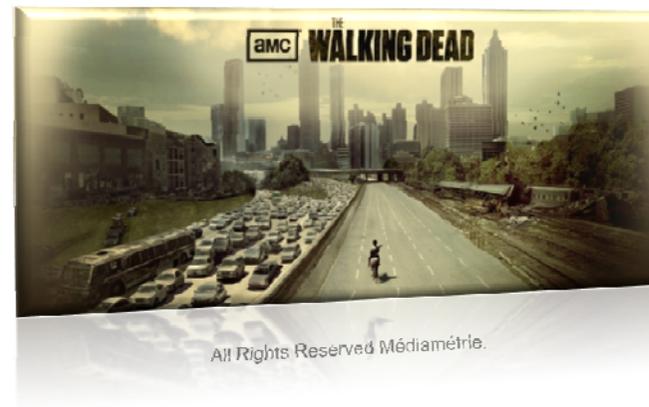
Overall, tough competition worldwide is pushing the producers and broadcasters towards imagining new tactics and strategies to retain audience, especially the young adult demographic, through the wide range of available media.

US fiction, still on top

A wide range of local fiction

Local productions account for about 99% of the total of series broadcast in the USA. In contrast to most of the other countries where some foreign series appear relatively frequently in the programming grids, US channels only rely on local fiction. This still seems to be a successful strategy when looking at the good audiences and the excellent feedback some of them receive worldwide.

With huge production budgets, amazing casts and well researched marketing plans, US series stand as a reference in several countries and the novelties are highly awaited. If the networks are still on top in terms of ratings with some long-running series such as **CSI**, **NCIS**, **House**, **Two and a Half Men**, cable channels get more and more market share locally and internationally with series dealing with quite different subjects to cops, doctors and laughter tracks. Some of them deal with zombies (**The Walking Dead**, AMC), drugs (**Weeds**, Showtime), cancer (**The Big C**, Showtime), drugs and cancer (**Breaking Bad**, AMC), medieval fantasy (**Game of Thrones**, HBO), gladiators (**Spartacus**, Starz), cow-boys (**Hell on Wheels**, AMC), and so on...



The first season of **The Walking Dead** multiplied by about five the channel average among all individuals, and by about seven among the commercial target 18-49.

In Spain, the series ranked as the 6th most watched series over the 2010-2011 season among young adults 25-44, and as the top US series.

A thirst for the US

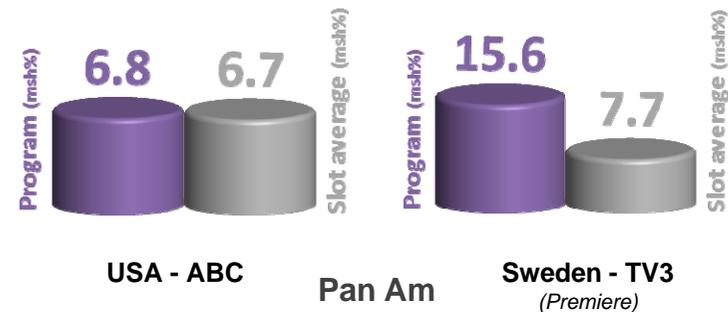
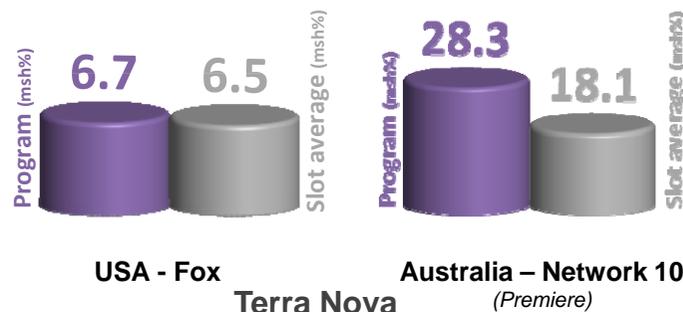
US series not only totally control their local market, their are also performing very well worldwide. Indeed, the worldwide average audience gathered by **CSI: Las Vegas** in 2010, ten years after its first broadcast in the United States, was 65.3 million viewers*. It's the most watched series over the past year.

Overall, well-known US programmes such as **House**, **Desperate Housewives** and **Grey's Anatomy** are still reaching top scores in international markets, especially among young adults, and some countries such as France and Germany rely heavily on US fiction to gather the audience.

Different markets also mean different viewers, representing a chance for some averaged-rated series to become hits outside the USA.

For example **Terra Nova**, the big budget sci-fi series created by Steven Spielberg enjoyed a successful international roll-out. The 2-hour premiere in Australia clocked up a performance which was more than 40% up on the slot average.

Another example would be **Pan Am**, a period drama set in the 1960s that focuses on the world-famous airline Pan American World Airways. Recently launched in Sweden, **Pan Am** registered the highest-rated foreign series premiere ever on TV3.



*Source: International TV Audience Awards 2011.

The competition is heating up

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The growth of non-US productions worldwide

A few years ago, while audiences of reality TV programmes significantly dropped, fiction struck back and US scripted formats took Europe by storm, with *Lost* or *Desperate Housewives* which became international hits within a few months. This resounding success worried but also challenged local producers and broadcasters from outside the States.

Now, after several years of supremacy of US series over the western world, local shows are now taking back the power in several countries. Indeed, the last scripted series season showed a slowing down in the expansion of US programs, to the benefit of local and foreign productions which are grabbing more and more viewers each year. Compared with the 2009-2010 season 19% of the top 15 best performing series were from the USA*, while in 2010-2011 the number dropped to 13%. This drop is mostly benefiting other producing countries such as the United Kingdom and the Nordic countries, as well as local productions. Foreign productions represent 13% of the hit series among all individuals (vs 4% in 2009-2010), and 4% for the young adults demo when only local and US series were included in the top 15 during the season 2009-2010.

UK productions in particular are performing well worldwide. The period drama *Downton Abbey*, for example, ranked third among all individuals in its home country, and also reached very good scores in Australia, Sweden and Spain. The investigation series *Midsomer Murders* also attracted viewers in Australia, as well as in Sweden where it ranked in first place among all viewers with a 50.6% market share, and second among young adults 15-34.

Downton Abbey



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*Source: **Scripted Series Report**. Countries studied: Australia, Canada, France, Germany, Italy, Quebec, Spain, Sweden, Turkey, United Kingdom, USA

The boom of co-productions

Facing this thirst for local content, international co-productions are an important means of financing, but also represent an opportunity to produce world-class projects, on air in multiple territories, resonating with local audiences.

Los Sonicos: Una Historia de Rock



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Co-productions are booming, sometimes borrowing talents from the other countries, such as **Borgia** (France, Germany, Czech Republic), one of the most anticipated series of September in Europe, written by Tom Fontana (the man behind the US series *Oz*). Nordic countries are also prolific, with for example the latest Swedish/Danish investigation series **The Bridge**. Some new partnerships are created, such as the United Kingdom and Argentina, whose productions company teamed up to release a series focusing on a famous '60s rock band and called **Los Sonicos: Una Historia de Rock**.

In terms of co-productions, their strength (and difficulty) lies in uniting different people around a unique subject, in order to allow their broadcast in several countries. That's why most of the latest hits were based on bestsellers, such as the adaptation of the hit novels **Millennium**, **Wallander** and **The Pillars of the Earth**, which met with huge international success. Quicker to put on screen than original drama, as the story is already written, these series target a large population as they wish to gather the people who have already read the book, as well as conquering the people who haven't. Historical fictions are also highly appreciated by the audience, as shown with the success of **Rome** or **The Tudors**, as their advantage is to be less influenced by the contemporary culture of each country than the local series set in a more modern period.

The rise of adaptations worldwide

Need some inspiration?

Although the USA still doesn't broadcast foreign series, it seems that they get more and more inspiration worldwide. This year several adaptations have been put to the test on the screens of US viewers, with most of them coming from the United Kingdom. Following the success of the US versions of *The Office* and *Little Britain*, cable channels MTV, Showtime and Syfy have found inspiration in the UK's scripted series catalogue. MTV picked *Skins* while Showtime chose *Shameless*, both of these series coming from Channel 4, and Syfy picked out *Being Human* from the BBC catalogue, that perfectly fits its supernatural line-up in revolving around three roommates who appear to be in their twenties, who try to live normal lives despite being a ghost, a vampire, and a werewolf. Further countries also provide some inspiration, like Denmark which sold *Forbrydelsen* (*The Killing*) to AMC, or Israel, with *Ramzor* (*Traffic Light*, Fox), and *Hatufim* (*Homeland*, Showtime).

Like for cinema, the American TV industry is always happy to reinvent its glorious hits from the past, giving it a fresh makeover at the same time. Before *Dallas* and after *Hawaii 5-0*, US TV tried to pull it off again by remaking the 1976' series *Charlie's Angels* but without success.

Among the new and original series, some are clearly inspired by other recent successes. For instance, *Mad Men*'s triumph paved the way for two new series, *The Playboy Club* and *Pan Am*, which adopted the same historical background and nostalgic approach, but got much mixed results.

Skins UK



Skins USA



The Playboy Club



Pan Am



Mad Men



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US fictions in a different format

Taking inspiration from abroad seems fair enough, however, as other countries have often been inspired by the US productions, whether in the content or in the style of directing. This trend is increasing, with the rise of adaptations of US formats.

This provides the opportunity for the producers to be closer to the culture of the country of broadcast, in order to seduce more viewers. If American series were adapted for international markets for a while, with the franchise **Law & Order** for example, or with local versions of **The Nanny**, **My Wife and Kids**, **According to Jim**, the past season saw this trend growing: **Everybody Loves Raymond** for example has been adapted in Poland, Lebanon, Netherlands and Egypt to name only those, while a local **Prison Break** was broadcast in Russia and **Desperate Housewives** is being adapted in Turkey after being developed for several Latin America countries, in the same way as **Grey's Anatomy** in Colombia. Recent series are not the only ones to seduce viewers: Israel recently launched a local adaptation of **The Golden Girls**, just as Spain did last year. In the latter, the series from the 80's managed to rank in the 10 best performing series over the 2010-2011 season among all individuals.

Poland



Everybody Loves Raymond



Egypt



Liban

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Pushing back the boundaries

Mixing style and genres

More and more scripted series involve a lot of well-known professionals from the film industry. Willing to offer the best quality drama to the viewers, the broadcasters allow a lot of freedom to actors and directors coming from the cinema world. If this involves rather more expensive productions than usual, it also ensures good ratings, at least for the premiere episode, as it gives the series a kind of seal of quality.



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In the USA in September 2010, **Boardwalk Empire** was highly anticipated for numerous reasons, the first of which was its being produced by Martin Scorsese, who has also directed the first episode, incidentally the most expensive pilot episode produced in television history. Still on HBO, the upcoming series **Luck**, which focuses on the intersecting worlds of horseracing and gambling, will star Dustin Hoffman. Launched in October 2011, the first episode of the police series **Boss** has been directed by Gus Van Sant, while Steven Spielberg also turned towards television, with TNT's **Falling Skies** and Fox's **Terra Nova**, among other projects.

Overall, scripted series are becoming more and more difficult to characterize, mixing up literature, cinema, but also breaking down the barriers between genres. While reality TV is taking up the codes of fiction, leading to a dramatization of the entertainment programs and to a new genre called "constructed reality", fiction keeps on feeding itself from entertainment, giving birth to hybrid programs, mixing documentaries, entertainment and fiction. For example, the comedy **Angry Boys** in Australia was described by its producers as a "mockumentary series", mixing fake documentary with scripted sketch shows. In Sweden as well **Grotesco** is confusing the viewer who doesn't know for sure whether he's watching a comedy show or a scripted series.

Angry Boys



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Playing with different media

In addition to these moves in the scripted series format comes the increasing power of new media. Producers and broadcasters must deal with the development of new modes of consumption, and set up transmedia strategies to create higher engagement from the viewer. From the intensive use of social networks such as for *Haven* (Syfy) which created a storyline that flows between the show itself and Twitter through characters' accounts, to the development of social games as for *Homeland* (Showtime - <http://watchcareful.ly>) that gave users the opportunity to unlock unseen episodes, scripted series use every media available to engage the viewers in every possible way.

American Horror Story, directed by the famous director Ryan Murphy (Nip/Tuck, Glee...) and broadcast on FX, tells the story of the Harmon Family who move from Boston to Los Angeles to reconcile their past. The troubled family moves into an equally troubled house and crazy things start to happen. Each member of the family is experiencing the house differently.

This series is accompanied by a huge transmedia plan, brought together under the name *Social Horror Story* allowing to tweet, check-in, post, share, like and more from a unique place (in November 2011, one month after its launch, the series already gathered 460 000 fans). Unseen footage is also available, as well as a game, pleasantly named [You're Going to Die in There](#), allowing the viewers to discover the secret history of the house.

Undoubtly, social games are an effective extension to maintain and draw attention to TV shows. They provide viewers with the opportunity to interact, to create and to be part of the content.



About the author



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