European broadcasters are filling their prime-time grids with a mix of local dramas and adaptations of unscripted formats. By Steve Clarke

Much of Europe remains economically challenged with advertising revenues in decline in many markets. The southern part of the continent—Greece, Italy and Spain, for example—is still gripped by the impact of the 2008 crash.

"Southern Europe is still challenged," says Cathy Payne, CEO of Endemol Worldwide Distribution. "Spain has bottomed out and the situation is starting to improve a little. Countries like Spain and Greece are using up their inventory because they can’t afford to buy that many new shows."

But elsewhere in Europe, broadcasters are prepared to splash cash on shows they believe are capable of cutting through the digital clutter. Overall, there are few signs of big, free-to-air broadcasters turning to acquired material for peak time, be it TV series or feature films. But there are exceptions—in Germany, ProSieben’s top two broadcasts in 2013 were The Hunger Games (6.5 million viewers) and Pirates of the Caribbean: On Stranger Tides (4.4 million).

Across much of the continent and beyond into the U.K., the mantra at the major networks is "think local," even if this involves significant, up-front investment in license fees for formats and production costs.

"Drama is doing well, especially series," points out Payne. "Overall, TV movies and miniseries are less popular."

This view is echoed by Maria Kyriacou, the managing director of ITV Studios Global Entertainment (ITVS GE). "There is more demand for high-end drama and more of a willingness..."
Long-running soaps like ITV’s Coronation Street continue to generate high ratings while returning series, most famously the period piece Downton Abbey, are schedule staples.

“Drama is one of the core genres of ITV,” explains Peter Fincham, ITV’s director of television, channels and online. “There is no question of our commitment to drama. We are at a very exciting time in drama when audiences are more or less saying to us, ‘Challenge us. Take us to places we didn’t expect to be taken. Give us something radical. Give us something unexpected.’ The result of that is that there is a lot of good television drama around.”

Fincham is bound to say that. But critics agree that expensive home-grown drama helps invigorate tired schedules.

Last year, ITV’s most talked about new drama series was Broadchurch, an eight-part thriller dedicated to one crime solved in the final episode. The influence of Scandinavian crime drama was evident in the leisurely way the narrative unfolded.

What did Broadchurch teach ITV about audiences’ appetites for drama and how it is made and scheduled? “I think what it showed, and it’s not unique in this, is slightly contrary to what people normally thought,” explains Fincham. “People thought the audience’s attention span is getting smaller and we are living in an age of 30-second video clips. I don’t think that was ever right. People’s atten-

STRETCHING THE BUDGET

Ireland is one of Europe’s smallest TV markets. The local economy is at last showing signs of growth following a prolonged dip. Even so, the purse strings remain tight at TV networks.

“Money is definitely tighter and commissioners are looking for guaranteed successes,” says Dermot Horan, the director of production and acquisitions at Irish state broadcaster RTÉ. “This is difficult in a creative world.” He adds: “As a rule, shorter-running series are working better on free-to-air channels. They can be scheduled as events, appointments to view that should be watched live.”

In Ireland, as is the case with many European markets, Horan identifies original drama as “the most potent ratings gatherer. Event shorter-run series of four to eight episodes are the current favorites of viewers, such as Amber (about a missing teenager) and Love/Hate (a Dublin gangland saga),” he elaborates.

It is a similar story across the Irish Sea in the U.K., widely regarded as the most dynamic TV market in Europe. The two main terrestrial channels, BBC One and ITV, depend heavily on drama to attract prime-time audiences.
The Musketeers, a period action drama, aired earlier this year in a prime-time slot on BBC One.

Dramas like Broadchurch and reality behemoths such as I’m a Celebrity... Get Me Out of Here! ensured that against overall viewing patterns, ITV experienced an exceptional year in 2013. The 13th season of I’m a Celebrity... Get Me Out of Here! achieved its second highest ratings ever. The German version of the show also scored for commercial broadcaster RTL last year.

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Crime series, notably police procedurals, still resonate with ZDF’s audience. British imports, including Midsummer Murders, DCI Banks, Lewis and Luther, are regulars in the 10 p.m. weekday slots on ZDF and ZDFneo.

The Sunday night slot on ZDF is a showcase for Scandinavian dramas like Forbrydelsen and Bron/Broen, distributed and co-produced by ZDF Enterprises.

Acquired shows such as Mad Men and House of Lies are part of the prime-time mix on ZDF’s digital channels. These series are given a secondary window in a late-night Friday slot on the main network, but ratings are not high.

David Weiland, BBC Worldwide’s executive VP for Western Europe, confirms that crime certainly does pay in Europe’s biggest TV market. “With Germany we’ve seen an upsurge in drama sales, especially crime drama, and it’s great to see shows like Sherlock being given a prime-time slot on ARD. Of course, this country has always been a big buyer of factual programming with many broadcasters partnering with us as co-producers—
for example, RTL on Hidden Kingdoms.”

Weiland continues, “Buyers cottoned on to the fact that British drama can provide an alternative to U.S. fare. We saw a turning point thanks to three definitive shows that made this shift happen: Luther, Sherlock and Misfits. As a result we’ve seen a substantial increase in drama sales across the region. Interestingly, in Iberia and Italy there has all of a sudden been a big demand for cookery and travel, where before there was very little. This is of course related to the DTT fragmentation in Italy and Spain.”

LONDON CALLING

ITVS GE5’s Kyriacou agrees that British drama is having a moment across the continent. “We are well known for our drama and have a lot of returning series that are tried and tested. U.K. drama is highly respected across all the European markets and can bring a halo effect to broadcasters’ schedules.”

Further north in Norway, John Ranelagh, the director of acquisitions at commercial station TV 2, confirms that American shows are catching a cold on mainstream networks.

“Acquired drama and films are slipping on TV, and have been for some years,” he says. “The content is being viewed—and viewed more than ever before—but not on screens controlled by broadcasters. This is especially the case with U.S. fare, where a U.S. transmission effectively makes the content immediately available globally through OTT services, not necessarily through piracy. We need to control our shows to the greatest extent possible so that they do not appear on screens that compete with ours.”

He adds: “Broadcasters recognize that they need to be event-driven and local in order to compete for viewing time. The trend today is that there is no real trend. Broadcasters everywhere are experiencing falling shares and are searching for popular programming—principally formats—that they can control. A major problem is that the expense of most prime-time production naturally generates risk-averseness.”

From Ranelagh’s perspective, the upshot is that the vague for local production for prime-time slots is leading to an increase in low-budget shows in daytime and late-night segments.

There is one vital caveat, according to the TV 2 executive: “If a show is identified as having strong potential, money will still be spent. In our business, you don’t make money unless you are willing to spend it”.

Local versions of FremantleMedia classics including Farmer Wants a Wife and the king of shiny-floor shows, Idol, rate well in Norway. Crime drama inevitably packs a big punch in Scandinavia. “In the Nordics, it’s no surprise that crime drama drives the big package deals,” says BBC Worldwide’s Weiland. “Series such as Sherlock, DCI Banks, Silent Witness and Death in Paradise are welcomed by audiences. They are all scheduled in prime time on the major channels.”

ITALIAN SEASONING

In Italy, locally made drama remains popular on the channels run by the big broadcasters. The shows that rate the highest tend to be traditional crime stories. These include the long running Il commissario Montalbano and Don Matteo, both shown by national broadcaster RAI.

Alberto Rossiini, the VP of entertainment and factual at FOX International Channels Italy, thinks the conservative nature of the mainstream Italian free-to-air channels provides him with an opportunity, in spite of the weak economy. “I can’t deny that the Italian economy is in bad shape, but there are not many of the world’s best TV shows that aren’t available somewhere on Italian TV,” he says.

“When the crisis hit, FOX and Sky did not stop investing in local production. The levels of investment might not be as high as they were before 2008, but it has continued. On FOX Life we have local versions of international factual-entertainment formats like Four Weddings, Kitchen Nightmares and Project Runway. They perform well for us,” adds Rossiini.

“Relatively, Grey’s Anatomy does better on FOX than on free-to-air in Italy, which has the second window.”

He concludes: “Compared with five years ago, on free to air the biggest change has been the decline in the
year on year, or might have flattened or grown a little. They always want to take that curve and then follow it to some logical conclusion. But I would caution anyone against doing that.”

Endemol’s Payne observes that “shiny-floor talent shows are very expensive for broadcasters. But when they’re good like The Voice or Rising Star, they pay dividends. Rising Star has been acquired by many networks for huge prices, including ITV in the U.K. and M6 in France.”

**FINDING THE MONEY**

Endemol’s The Money Drop (known as The Million Pound Drop in the U.K.) overtook Come Dine with Me as Europe’s most valuable format in 2012, according to analysts Essential Television Statistics, Madigan Cluff and Digital TV Research. The format has sold to more than 35 territories, including France’s TF1 and numerous Central European countries such as Lithuania, Slovenia and Serbia. Nowadays, France is fertile ground for glitzy entertainment shows.

“The biggest change we noticed is their appetite for entertainment shows,” says BBC Worldwide’s Weiland. “Our production base in Paris has had terrific success with Danse avec les Stars on TF1, which is one of their biggest Saturday night prime-time shows.”

But Dancing with the Stars is hardly a new format, and there are signs that even some of the longest-running formats are nearing the end of the road. In a bellwether market like the U.K., it is perhaps significant that the veteran quiz show Who Wants to Be a Millionaire? ended its 15-year run on ITV in February.

“People the world over are looking for the next big thing in entertainment,” emphasizes ITV’s Fincham. “I think they are and always will be, and this is certainly not something peculiar to ITV or the U.K. You’ll find it in America, you’ll find it in Germany and France and any big territory where television audiences like entertainment. We are all, always, looking for the next big thing.”

That is one constant across all networks, regardless of changing audience tastes or technological innovation.

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**STAND-OUT HITS**

“It is really hard to find stand-out hits, so for the right program, most broadcasters want to invest—within reason of course,” notes the BBC’s Cohen. “At the same time, we all have to balance our books, so programs that can be made in longer, formatted runs are also very important.”

This can be good news for distributors, but it is local versions of entertainment formats that are helping to attract European audiences.

Talpa’s reality talent show The Voice is a hit across Europe. “Live entertainment retains a very important place in people’s hearts,” suggests Cohen, who commissioned the show for BBC One.

ITV’s Fincham agrees: “We have The X Factor, we have Britain’s Got Talent. I think people watch the entertainment space and they see that one particular series might be down a little bit number of movies broadcast while on pay it’s been a huge increase in quality.”

Given fragmenting audiences, heightened by digital distractions provided by Netflix and others, identifying standout shows is more important to broadcasters than ever.