

The Global TV Format Trading System: Trends and Developments since the Format Revolution

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The history of TV formats is now relatively well established, not least thanks to Albert Moran and other people around this table, but it seems to me that the period we know least is the last 10 years. We sometimes act as if time had stopped since four super-formats *Who wants to be a millionaire?*, *Survivor*, *Big Brother* and *Idols*, swept the world. But it sometimes feel that time has stopped indeed, as they formats, and their newish successors, are still winning rating wars in many countries.

However, scratching beneath the surface, the past decade has probably been one of the most eventful for the format trade. In this short presentation I am highlighting three key points in the recent history of the TV trade.

1. The format trade has truly become global, penetrating further into established markets and reaching territories it has never visited before. It only since the late 1990s, and precisely since *Who wants to be a millionaire?*, that broadcasters in the world's premier media market, the USA, have been buying formats in great numbers. New markets include territories in the Middle East and Africa, but it is in Asia that the growth has been most noticed, and rightly so. Format buying and adapting has become an established practice in Asia over the past 10 years. In China, the format market was heating up so much that the authorities decided to restrict new formats to one per broadcaster earlier in the year. But formats have also reached lesser Asian markets, including Mongolia, Cambodia, where a broadcaster will adapt *Got Talent* next year, and Burma, where a local version of *Family Feud* will be produced next year. The key aspect of Asian format trading is the recent understanding from local parties that all benefit when intellectual property rights are respected.

2. Secondly, the 2000s witnessed the completion of the format revolution in terms of genre. Scripts were adapted in the sound broadcasting era the 1920s and 1930s. However, the first half-century of TV formats was mostly about game show, despite the prowess of Beryl Vertue and Greg Grundy, *Verbotene Liebe* and all that. The format introduced new genres to the trade business, most notably reality and factual entertainment. However, the recent years have been marked by a sharp growth in scripted formats. The first signs of this growth are visible in the 2009 FRAPA data set, and anecdotal evidence points to continued growth in this genre. Today, adaptations of virtually all British dramas are tested out on the US market every year. It is also a genre where Germany performs very strongly thanks to constructed reality shows. For instance, 2,600 episodes of Filmpool's constructed reality shows such as *Two with Kallwass*, *Cases of Doubt* and *Families at the Crossroads* have been produced in Europe so far.

Adapting scripted formats is a more complex operation than for other genres: the knowledge transfer is less mechanistic and the risk remains substantial. Nonetheless, stars came together for scripted formats when the demand for scripted shows and the number of drama buyers increased, when Hollywood studios began to mine their catalogues for formatable scripts, when new format exporters emerged, and when knowledge transfer techniques improved.

The late surge in scripted formats is significant for two reasons. First, it completes the TV format revolution and the trade today spans all genres. The TV industry has learnt to adapt any programme, from the most mundane and formulaic game show to award-winning prime time scripted entertainment. Second, scripted entertainment shows formats are their best: great platforms for local story telling,

3. Finally, and most importantly, the format business became a *transnational trading system* in the 2000s. A trading system can be defined as *a singular transnational space that brings together interdependent economic agents, institutions, places, networks and commodities*.

I took the concept of trade as a system from scholars such as Pieter Emmer and Horst Pietschmann who study the history of the Atlantic as a singular

maritime space. The 'Atlantic system' designates the networks of trade and culture which have developed across the Atlantic throughout the centuries. In its last phase, it was marked by the 'Atlantic triangle', which saw manufactured goods leaving Europe for Africa to be exchanged for slaves, who in turn were shipped to work on plantations in the West Indies and the Americas, from where plantation products (coffee, sugar, cocoa, dyes, etc.) were exported to Europe.

There are many aspects that make the format trade a system, including an international network of companies that are accustomed to do business together, trust each other, and share a common set of values. It also entails an increasingly efficient international legal support system. Indeed and despite these pending issues, the legal recognition and protection has progressed by leaps and bounds in the 2000s and rights owners' legal position is stronger than ever. All successful copyright cases, bar two, and most successful unfair competition cases, occurred since 2002. The TV format transnational trading system also includes marketplaces such as NATPE and MIPCom where agents can do business and maintain relationships, the emergence of trade associations, and a trade press that improve and accelerate information flows within the industry. This system also entails specific *trade routes*. One key aspect of all trading systems throughout history is that commodities, whether spices, coffee or slaves, have always travelled along specific routes. Trading systems depend on tightly structured commodity flows, and in turn the stability of these routes is feeding into the systemic nature of these trading systems (Bernstein 2008). When one reads cultural theorists like Ulrich Beck, one feels that all boundaries have vanished into thin air and formats flow from all directions. But it is no different in TV format trade, as the most basic examination of the known data reveals tightly structured trade flows. On the basis of the FRAPA data set, three tiers of TV format exporters can be distinguished. Britain and the USA precede a group of seven mid-sized exporters (Australia, Argentina, France, Germany, Japan, the Netherlands and Sweden), themselves followed by a third tier of smaller exporters (Denmark, Canada, Italy, Norway and Spain). Between 2006 and 2008,

Britain and USA exported more formats (431) than all the other exporters put together (386).

Would the 2013 data being vastly different? No doubt that an intellectual property-based trade is more flexible than the food supply chain. Although the number of format exporters is slowly expanding, the overwhelming majority of formats still originate from a small number of territories.

These are the three reasons why last decade was very significant in the format business, which is now placed at the heart of the world TV industry.