

# The Rise of British TV Formats: An exploration of the British Predominance in Format Trade through the Positioning of British Non-fictional Entertainment Formats in the German Television Market

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Television in the United Kingdom (UK) is largely dominated by entertainment shows, the second most popular genre on British television after news/weather (TV Licensing 2012). Within this genre *The X Factor*, *Britain's Got Talent*, *Strictly Come Dancing* and *I'm a Celebrity...Get Me Out of Here!* are amongst the most prominent and successful programmes (TV Licensing 2012). All these popular entertainment shows have one commonality: they have all originated in the UK. However, they also exemplify a current development in national television environments, as well as on a global level, which is the continuously extending phenomenon of television format trade. All these shows are not only broadcast in their own country, but have been formatted, sold and adapted all over the world. This also includes countries with strong and financially stable television industries, such as Germany, which is dominated in the entertainment genre by format imports, particularly imports from the UK.

The practice of buying ideas for television shows, as well as a programme itself, has been around since the 1950s. However, it can be argued that it has not been until the late 1990s 'that the format business turned into a global industry', particularly through 'the emergence of four exceptional formats (*Who Wants to Be a Millionaire?*, *Survivor*, *Big Brother* and *Idol*)' (Chalaby 2011, p.294). *Who Wants to Be a Millionaire?*,

for instance, had already been exported to over eighty countries just four years after its first airing in the UK in 1998 (Bielby and Harrington 2008, p.112). It has now been broadcasted ‘in 118 countries around the world’, according to its current production company Victory Television (2012). Since its emergence in the 1990s, worldwide format trade has continued to increase by approximately 10% a year (Kretschmer et al. 2009), turning the TV format industry into a €3.1billion-a-year global trade (FRAPA 2009, pp.7-8). As Liddiment (2002), former Programme Director of ITV, states

formatting is the future of TV entertainment. To an extent never seen before, broadcasters around the world are sharing rating winning concepts and ideas via the programming ‘currency’ of formats (cited in Moran and Malbon 2006, p.9).

It is the UK that is at the forefront of this development with British formatted programming accounting ‘for roughly 40% of the total global flow’ and ‘annual revenues of more than €1billion’ (Torre 2012, p.182).

The popularity of British formats is further supported when looking at the total value that TV formats have generated across the European market, or in other words ‘the financial benefit [...] that broadcasters receive by screening these formats’. The British format *Come Dine with Me* was the most successful format in 2011 with a total revenue of \$217.4million (ETS et al. 2012), while coming second to *The Money Drop* in 2012, a format that also originated in the UK and generated a total value of \$213.4million (Clarke 2013). The dominance of British formats on the international television market becomes even more apparent when looking at the numbers of exported formats worldwide, as compiled by FRAPA (2009), the Format Recognition and Protection Association. The UK has by far the greatest number of exported formats with a total of 146, while the United States, the

dominant force in the export of ‘finished’ television programming, only exported 87 formats during the same period of 2006–8, coming second in the international format trade.

This paper will explore the predominance of the UK in the international TV format trade by examining the role of British formats in a single foreign television market, providing an in-depth analysis. Germany has been selected as the most appropriate foreign television market. It greatly resembles the British television market in its structure, as both television landscapes are based on a dual broadcasting system of public service broadcasters and commercial channels. Additionally, total television industry revenues are also similar, accounting each for around £11billion. However, when referring to the German television industry in relation to the global format market, it becomes apparent that Germany is significantly weaker in the export of television formats than the UK. Germany exported 22 formats compared to 146 British ones, while being one of the biggest importers worldwide, importing 73 compared to 37 formats in the UK (FRAPA 2009). This considerable distinction between import and export figures indicates that the German television market is particularly suitable for the analysis by providing a relevant counterpart to the British performance on the international TV format market.

The exploration of the positioning of British non-fictional entertainment formats in the German television market will highlight reasons for the predominance of Britain in the international format trade. This examination will first provide a brief outline of the popularity of British formats in relation to Germany, while then turning to audience perceptions of format origins, based on an online self-completion questionnaire. Predominantly, the focus of analysis will be revolving around the perceptions and attitudes of German television

industry professionals, obtained through a mixture of face-to-face, phone and email elite interviews.

### **The Context of TV Formats**

The study of TV formats is relatively new and ‘research on the acquisition and production of TV entertainment is still in its developing stage’ (Moran 2011, p.81), despite its growing market volume. While research is limited, some of the key texts from various aspects of television formats, including definitions and descriptions of the term ‘format’, format history, trade and adaptation, can be identified and discussed, giving a first indication on the British dominance in format development and export. There are four main texts relating to the field of television formats and this research in particular. First, *Copycat TV: Globalisation, Program Formats and Cultural Identity* (Moran 1998) is one of the first extensive academic writings focusing on the topic. *Understanding the Global TV Format* (Moran and Malbon 2006) can be considered as a guide to the rapidly growing field of TV formats and adaptations, ‘giving a systematic overview of this relatively new face of international television’ (2006, p.14). *TV Formats Worldwide: Localizing Global Programmes* (Moran 2011) comprises a collection of research relating to this field, particularly concerning aspects of trade and adaptation. Finally, *Global Television Formats: Understanding Televisions Across Borders* (Oren & Shahaf 2012) encompasses current academic essays on TV formats as a global phenomenon.

Although the origin of the term ‘format’ can be traced back to the printing industry, ‘where it is a particular page size in a book’ (Moran 1998, p.1), when relating the term to the field of television, it is not as clearly defined, as there is not one commonly accepted definition of TV format (Moran 2011). First of all, the term can refer to

the principle of serial programme productions. As Moran and Malbon (2006, p.20) state, a format:

can be used as a basis of a new programme, the programme showing itself a series of episodes, the episodes being sufficiently similar to seem like instalments of the same programme and sufficiently distinct to appear like different episodes.

This description is also frequently adapted by television professionals, explaining the term TV format through a food metaphor: ‘the crust is the same from week to week but the filling changes’ (Moran 1998, p.13). However, these descriptions don’t take into account one of the most prevalent features of TV formats, which is that to be classified as such it has to be packaged and sold to another country. As opposed ‘to the transnational model of program import/export trade’ of ‘finished television programmes’, it has to be locally adapted (Oren and Shahaf 2012, p.2). Combining these two characteristics leads to the most conclusive definition of the term being:

a program or program concept, with distinct elements that can be exported and licensed to production companies or broadcasters outside its country of origin for local adaptation (Moran 2011, p.80).

This indicates that trade in television formats is closely related to trade in experiences already made by the programme and its producers, compiled in the so-called format bible. This is further supported by Steemers (2004, p.175), who argues that ‘the production expertise has become more important than the idea in its own right’. Therefore, the positioning of British formats in Germany has to be considered in relation to the experiences that are purchased along with the licences to produce formats.

When looking back at the emergence of TV formats in the 1990s, it becomes apparent that the rise of formats is closely related to

the increasingly global nature of the television market. Moran (1998, pp.18-19) suggests that:

deregulation, privatisation and the advent of new distribution technologies has led to a multiplication of television channels available within national boundaries. The increase in channel choice, in turn, has potential to fragment audiences and as a consequence, the ever present industry imperative to try to ensure audience popularity for new programs is exacerbated.

In this new television environment, the import of low-cost foreign programmes is an efficient way to fill the expanded number of time slots (Moran 1998, p.19), due to the ‘integrations of global markets and decreasing transport and communication costs’ (Christopherson 2009, p.77). The focus on cost-efficiency is further supported by Steemers (2004), who argues that the use of entertainment formats is based on commercial considerations, especially in the fragmented broadcasting environment in Europe. As this environment is ‘faced with an expansion of transmission time and loss to pay television of key sporting events, entertainment formats provide a more cost-effective way of filling schedules with local production than locally originated drama’ (Steemers 2004, pp.173-174).

Another benefit related to the rise in format trade is the possibility for ‘local broadcasters [to] fill them with local talent’, as ‘much research has suggested that audiences frequently prefer local programming if given the choice’ (Waisborg 2004, p.369). The rise in the popularity of TV formatting is summarised by Gray (2008, p.99), who states that ‘formats save a broadcaster costly production costs while offering them the prospect of a *bona fide* “local” hit’.

This emphasis on local programming relates to the aspect of adaptation. Although national television industries have been increasingly integrated into a global television system, ‘television viewers seek to watch programs that look and sound familiar and speak

to them about the world they know. They insist on the continued relevance of the national' (Moran, 2011 p.965). Therefore, the success of a format is closely related to its adaptation, as it addresses the need for localised programming. Steemers (2004, p.175) supports this further, arguing that 'the ability to translate a format in different territories is reflected in the mixed success of shows', while 'the recent success of entertainment formats in prime-time underlines the growing importance of tailoring programming to fit local situations'. Localisation can result in format adaptations sometimes being 'invariably classed as a domestic production rather than an import' (Moran 1998, pp.22-23). This aspect will be further examined, establishing if German audiences are able to determine the origin of formats shown on their domestic TV screen.

### **British TV Formats in Germany**

British TV formats are the most successful when looking at the television industry globally, but where do British formats fall into the German television market space? *Ich bin ein Star — holt mich hier raus!*, the German version of the British format *I'm a Celebrity...*, has been the most successful TV format on the German market for season 2011/2012, the second season in a row, with an average audience of 3.96million viewers in the advertising-relevant target group of 14–49-year-olds. This is followed by *Das Supertalent*, the German adaptation of [Britain's] *Got Talent*, with an average viewing figure of 3.63million in the advertising-relevant target group (Kress 2012).

British formats are successfully exported to the German market, gaining great popularity amongst the audience and frequently topping the list of the most successful formats on German television. This is further supported when looking more closely at the television season 2010/11 with regards to overall viewing figures, not just the

advertising-relevant target group (MEEDIA 2011). Although the German entertainment format *Wetten, dass...?* is the most successful television programming with an average viewing figure of 8.89million, out of the six entertainment shows represented in the top ten, five are based on a format of British origin, which is half of all top-ten programme entries. The most successful British format on German television, when referring to the total audience, is *Farmer Wants a Wife* [3], with an average viewing figure of 8.01million. Further British formats dominating the top ten include the German version of the talent show formats *Got Talent* [4] and *Idol* [8], as well as the German adaptations of reality TV show *I'm a Celebrity...* [5] and game show *Who Wants to Be a Millionaire* [7].

When only considering the advertising relevant target group of 14–49-year-olds during that season, it is also British formats that are the most successful. While the German format *Wetten, dass...?* was previously identified as the leading programme in terms of total viewing figures, it only achieves the fifth place in the entertainment genre, being surpassed by the British formats *I'm a Celebrity...*, *Idol* and *Got Talent*, as well as the Dutch format *The Voice* in fourth place (DWDL 2011). British formats also dominate the genre of reality TV with the German adaptations of *Farmer Wants a Wife* and *Undercover Boss*. On the other hand, comedy, a genre overall less popular than the entertainment and talent show category, is dominated solely by shows that have originated in Germany. This suggests that the UK is superior in the development of formats associated with talent and reality TV genres. In comedy, the German audience prefers domestically developed shows, possibly due to different humour or other national tastes, indicating that the comedy genre is more difficult to adapt locally. Nevertheless, British formats have a dominant position in the German television market.

To look more closely at the adaptation of British TV formats on German television, an online self-completion questionnaire with 88 German respondents was conducted. The participants were obtained through snowball sampling in which an initial set of respondents, acquired through social media, were asked to further refer the questionnaire to other possible respondents. The 88 respondents were asked to determine the country of origin for 16 different TV formats by stating if they thought these were German, British or neither of these two. This relates to the localisation argument of Moran (1988), discussed above. The argument is further supported by Chalaby (2011, p.293), who states that ‘audiences are often [...] unaware that some of their favourite shows are the local adaptations of programmes that have originated elsewhere’.

The German respondents can be described as largely unaware of the origin of the TV formats broadcasted on their television screens, as the respondents only identified the origin for four out of the 16 formats correctly, when referring to the majority of respondents for each format, i.e. above 50% of the participants. These four formats were the British *Strictly Come Dancing* (57.3%), *X Factor* (61.3%) and *Got Talent* (69.7%), as well as the only German format on the list *Beat the Host*, which received 97.3%. This is also the highest number of participant responses, suggesting that the German audience feels strongly about nationally developed programming. Nevertheless, for the rest of the formats, German participants were unaware of the formats’ origins, as answers were largely inconclusive or not indicating a general direction in perception. This is exemplified by the *Idol* format, which was perceived as German by 25.33%, British by 41.33% and neither of these by 33.33% of German participants. Therefore, formats can be described as being multi-national. Through local adaptations, a format’s country of origin frequently becomes invisible to the audience, resulting in

shows being perceived as home-grown. Another example of this is the British format *Come Dine with Me*, which was perceived as a national format by the majority of German respondents (53.3%), while a staggering 81.06% of the respondents classified the British reality TV format *Farmer Wants a Wife* as a home-grown show.

The German audience is mostly unaware of the country from which formats have been imported and also, in some cases, that these have been imported at all. This suggests that British formats are popular on the German market, because the German audience is not actually aware that they are watching foreign programming.

### **British TV formats in Germany: TV Industry Professionals' and Experts' Perspective**

British television producers are often described by other industry professionals as the most successful in the European television landscape, especially in terms of international distribution. This general success is one of the overarching reasons why British television programmes are more likely to be shown on Germany television than programming originating elsewhere (Eickmeyer, personal communication, 27 March 2013). The focus will now be placed on determining factors that have an influence on the prominence of British formats on German television screens, which were identified through conducting elite interviews with the following industry professionals: Dave Donald (2013), Anke Eickmeyer (2013), Günther Jauch (2012), Simone Lenzen (2013), Lothar Mikos (2012), Participant A (2013) and Sahba Wahbe (2013).

The aspect that was mentioned most by the German interviewees, when asked about the reasons behind importing formats into the national market, is that Germany is averse to risk, especially due to the often unknown economic implications. As Mikos

(interview, 13 December 2012) states ‘Germany is this [...] country of anxiety and they always fear that they’ll fail with what they do’. This anxiety is especially apparent at German television channels, which were described by German producers as particularly unwilling to take risks. Instead, the channels rely on the import and promised success of formats, because these have already found an audience once, in another country. ‘If a format works somewhere else, it then presumably works in Germany too’ (Lenzen, interview, 31 January 2013). Overall, the networks place trust in the internationally successful formats, as, through the experiences that come with the licence for a format, it is easier to calculate risks. Unwillingness to take risks becomes further apparent when looking at channels’ commissioning practices. Sabah Wahbe (personal communication, 21 March 2013) describes her experience of bringing *Come Dine with Me* to the German channel VOX in 2005 by saying that while VOX was able to trial the format for longer, giving it a chance to develop itself in terms of viewing figures, today such a practice would be unimaginable. Where, in the past, channels directly commissioned 40, 80 or 120 episodes, this number has now been decreased to around 5. Additionally this often includes an opt-out clause in the commissioning contracts, ‘to cover their back’ (Wahbe, personal communication, 21 March 2013).

A recent example of this is the German adaptation of the British format *The Audience*, called *Die Zuschauer*, which premiered on RTL on the 27 March 2013. The programme was cancelled only two days after its initial airing, due to low viewing figures of 770,000 in the advertising-relevant target group of 14–49-year-olds, a market share of only 7% and ranking at number 24 in the daily-viewing-figure charts (Schroeder 2013). This shows that German television channels do not give programmes the chance to progress and expand anymore: they have to be instantly grabbing an audience. Therefore TV channels are

obstructing German production companies in developing domestic programming, as well as innovation in general. The import of already ‘tried and tested’ formats from abroad minimises the risk of financial losses and failure.

The UK, on the other hand, has been portrayed throughout the interviews as a country of innovation and as a ‘creative hub’, originating ‘many trends, from fashion and music to television’ (Participant A, personal communication, 10 January 2013). Television professionals perceive the UK as a ‘trendsetter’ and the German television industry often looks at the British market for guidance, for example in terms of imports. According to Simone Lenzen (interview, 31 January 2013) the decision to produce *Take Me Out* in Germany, which started airing in January 2013, was largely influenced by the success the programme was having in the UK, even though the format concept is originally a collaboration between Australia and France.

Furthermore, many of the interviewees also related the British success in formatting back to their long tradition in the export of television content. The revenue derived from exports can be put back into the British television industry and used for the development of new TV shows, similar to a portfolio approach (Doyle 2013). This is reinforced by Dave Donald (personal communication, 29 March 2013), who states that ‘international formats [...] generate extra revenue for the company who made it. This gives them extra money to invest in new programme ideas’. The UK has the opportunity to be innovative and takes advantage of this in their format development. The British industry has also adapted differently to the changes in the European television market, including deregulation, digitalisation and globalisation. While this leads to German networks preferring ‘tried and tested’ international formats, in the UK:

it is still a broadcaster's first instinct to commission from a UK supplier first before seeking out international formats. For the BBC there is also a worry that to be seen buying in programmes from elsewhere when they have their own internal programme making teams could be seen as a waste of licence-fee payers' money (Donald, personal communication, 29 March 2013).

This shows the influential role that television channels have in the international format trade. According to RTL's Eickmeyer (personal communication, 27 March 2013) the success of any television channel is determined by 'a healthy mix of two elements: consistency and innovation'. However, in Germany it is often the marketing and financial department that have the most authority within the TV network environment (Wahbe, personal communication, 21 March 2013). This leads to a preference for purchasing formats, as these reduce financial risk, as well as offering insight into how to market the show to the most relevant audience, relating back to the cost-effective aspect of TV format trade (Steemer 2004 and Gray 2008). British networks, on the other hand, place considerable emphasis on funding the development of new programming. There is a priority in 'finding the next channel-defining programme', as 'new ideas are the lifeblood of the industry'. Every station is working in an extremely competitive market and is constantly on the lookout for something that gives them the edge' (Donald, personal communication, 29 March 2013). TV channels in the UK are not as afraid to take risks, because they want to be different from other channels in their programming and channel image.

Furthermore, the relationship between the television channels and the production companies has a great impact on the development of domestic or in-house formats and the attitudes towards format imports. The popularity of British formats in Germany, as well as the corresponding apprehension towards innovation, is related to the

television industry's hire-and-fire system, in which the production team is entirely responsible for a programme and therefore the only bearer of risk. If German networks would take on more responsibility for new programmes, then innovation and the development of new ideas would be encouraged and nationally developed shows would find their way onto German television screens (Wahbe, personal communication, 21 March 2013). In the UK, on the other hand, the development of new programming is supported by TV channels, as 'often they will pay companies to further develop shows that they think may work, even if in the end it does not pay off' (Donald, personal communication, 29 March 2013). The general responsiveness to piloting shows on air has a substantial benefit for the British format trade, because as soon as a programme has been broadcast, it can be sold and distributed as 'tried and tested' worldwide. This is the case even if it flopped, because a display copy is produced — in other words, a visual aid to sell the format to foreign markets (Wahbe, personal communication, 21 March 2013).

### **Adaptation of British TV Formats for the German Market**

The import of formats into the German television market is based on German production companies examining a format's cultural suitability, whether there are already similar ideas available on the market and whether the production is feasible, especially in respect to the German budgets. The British format *Red or Black*, for example, which has a budget of £1.4million in the UK, could never acquire the same budget in the German television landscape (Wahbe, personal communication, 21 March 2013). Therefore the British shows have to be adapted to fit the German market's needs and prospects, without losing their USP (unique selling point).

Adaptation is also concerned with the audiences' demand for localised programming. For example, it may rely on the candidates, audience and show host to localise a format, suggesting that the success of the format is often related to them. In the case of *Wer wird Millionär?*, a show that still enjoys great popularity in Germany after 13 years of airing, a majority of respondents to the above questionnaire stated Günther Jauch as the reason for watching and favouring the programme. It is only the general framework of the *Who Wants to Be a Millionaire?* format and set design, which is tightly regulated by the production bible. As discussed in an interview with me, Jauch himself is not restricted in any way in his hosting and can decide how the show is being run. He suggests that the structure of the programme is primarily dependent on his presenting and interaction with the candidates, for which he does not need to seek any approval (Jauch, personal communication, 12 December 2012). This is closely related to the popularity of the programme, as Jauch (personal communication, 12 December 2012) states himself 'I am convinced that this freedom has played a major role in the success of the programme in Germany'.

Therefore, the way in which a format is adapted can largely determine its success. This is further supported by Eickmeyer (personal communication, 27 March 2013), who argues that the popularity of *Ich bin ein Star — holt mich hier raus!* is, on the one hand, related to the right mix of famous locally known candidates, 'on the other hand, it is the fantastic team', including the production company and channel, that has a large impact on the success of the show.

Overall, it is important to note that not every single British format that has been imported into the German market was discussed during the research and that included formats have been chosen due to their relevance to the subject of study. Furthermore, it has to be considered that the analysis of the audience perception towards TV

formats in the domestic German market was based on 88 respondents. This is only a small fraction of the total 37,412,000 German TV households. Therefore, only a selection of the audiences' tastes and preferences are displayed in this research. Also the choice of elite interviews was selective and limited. For example, production company professionals were all employed by large multi-national production firms, who will have a different opinion and perspective on format trade than smaller, independent production firms or firms only based in one country, which could form the basis for further research in the success of British formats. Furthermore, only one TV channel's view was represented and other channels might differ in their perception of format trade, suggesting that further research should focus on format trade from various other channel perspectives.

## **Conclusion**

The success of British formats on the German market is related to a variety of factors. First of all the German television industry has a tendency to be afraid to take risks, which results in difficulties of getting domestic developments on air and in the preference of 'tried and tested' internationally successful formats. From a British angle, a long tradition in the export of television programming benefits the development of new shows, which can then be sold worldwide. Furthermore, the British television landscape and channels support the development of new programmes and offer a nurturing environment in which developers and producers are encouraged to take risks and innovate. However, the success of the British formats in Germany also depends on the adaptation of the formats for the German market and therefore on the German production companies. Additionally, the audience research indicates that the popularity of British show formats on the German market could relate to the German audiences' unawareness of

the origin of the programmes and formats broadcast in the domestic market, classifying some of the British formats, such as *Farmer Wants a Wife* and *Come Dine with Me*, as having originated in their home country.

Nevertheless, the TV format industry, just like the global television industry, is an ever-changing business. Britain's current position in dominating the export of TV show formats worldwide could be surpassed by the development of a new, internationally successful format. Therefore, as Dave Donald (personal communication, 29 March 2013) suggests, the UK 'needs to continually innovate and invest in [its] creative industry to ensure we stay in the lead'.

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### ***German TV Formats and Shows***

- Beat The Host*. 2006–present. Created by RaabTV/Brainpool. [Format].

*Das Supertalent*. 2007–present. Prod. by Grundy Light Entertainment.

[TV] RTL.

*Die Zuschauer*. 2013 (27 March) Season 1, Episode 1. [TV] RTL.

*Ich bin ein Star — holt mich hier raus!*. 2004–present. Prod. by Sabah

Wahbe. [TV] RTL.

*Wer wird Millionär?*. 1999–present. Prod. by Endemol. [TV] RTL.

*Wetten, dass...?*. 1981–present. Created by ZDF Productions. [Format].

### **Other TV Formats**

*Big Brother*. 1999–present. Created by John de Mol. [Format] Endemol.

Netherlands.

*The Voice*. 2010–present. Created by Endemol. [Format] Netherlands.