The making of an entertainment revolution:
How the TV format trade became a global industry

Abstract

From its humble origins in the 1950s, the TV format industry has become a global trade worth billions of Euros per year. Few viewers are aware that their favourite shows may be local adaptations but formats represent a significant percentage of European broadcasting schedules in access prime time and prime time. Formatted brands exist in all TV genres and reach almost every country in the world. This article defends the thesis that the format business turned into a global industry in the late 1990s. Before this turning point, the few formatted programmes were most likely American game shows that travelled slowly and to a limited number of territories. Following an overview of this early period, this article examines the convergence of factors that created a world format market. These include the emergence of four exceptional formats (*Who Wants to Be a Millionaire?*, *Survivor*, *Big Brother* and *Idols*), the formation of a programming market, the rise of the independent production sector, and the globalization of information flows within the TV industry.

Key words

Media globalization; transnational television; TV formats; TV format industry; world format market

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TV formats: Inconspicuous globalisation

Whilst some aspects of media globalisation are clear for all to see, such as the Hollywood star system, others are more subtle. In the case of transnational TV formats, audiences are often blissfully unaware that some of their favourite shows are the local adaptations of programmes that originated elsewhere. British viewers have no inkling that *University Challenge* (ITV, 1962 - 1987; BBC 2, 1994 – to date) is the local version of an American show called *College Bowl*, or that both *Dragon's Den* and *Hole in the Wall* originated in Japan. Few in France suspect that the country's most popular quiz show, *Questions Pour un Champion*, which has aired on a public service channel since 1988, is an adaptation of *Going for Gold*, an old Australian TV show. And not many Dutch and German viewers would ever imagine that their favourite soap since the early 1990s, *Goede Tijden, Slechte Tijden* (the Netherlands) and *Gute Zeiten*, *Schlechte Zeiten* (Germany), began life as an adaptation of the Australian soap, *The Restless Years* (Moran, 1998: 56, 61).

From humble origins in the 1950s, the global TV format industry has become a €3.1 billion-a-year global trade (FRAPA, 2009: 7-8). Formats might travel unnoticed but today they represent a significant percentage of the European broadcasting schedule in access prime time and prime time. The hundreds of formats that are traded each year span all TV genres and reach almost every territory. This article defends the thesis that the format business turned into a

global industry in the late 1990s. Before this turning point occurred, the few programmes that were formatted were typically American game shows, which travelled slowly and to a limited number of territories. Following an overview of this early period, this paper briefly highlights the main features of the contemporary format industry before analyzing the factors behind the formation of a world format market. These include the emergence of four exceptional formats (*Who Wants to Be a Millionaire?*, *Survivor*, *Big Brother* and *Idols*), the formation of a programming market, the rise of the independent production sector, and the globalization of the information flow within the TV industry. First, however, this article defines the concept of format, emphasizing both its narrative and transnational dimensions.

The TV format: a transnational practice

Formats are notoriously difficult to fathom. Cynics say that a format is any show that anyone is willing to pay for, and some lawyers claim there is no such thing as a format since ideas cannot be copyrighted. The industry dissents with the latter point, pointing out that formats are not merely made of ideas but combine a great deal of expertise (Lyle, interview 2009).

Short of a consensus, two key aspects of formats can be emphasized. First, a format must have a *distinctive narrative dimension*. The Format Recognition and Protection Association (FRAPA), founded by David Lyle in 2000, defines a format as follows: 'In the making of a television programme, in the ordering of the television elements such that a distinctive narrative progression is created' (Gilbert, interview 2008).

In three key genres of the format trade - reality, factual entertainment and the talent competition - a good format creates and organizes a story in a fashion that is not dissimilar to scripted entertainment, with all the highs and lows, tensions and conflicts, twists and conventions, of drama. These formats are driven by an *engine* (essentially the rules) (Keane and Moran 2009), which is designed to create *dramatic arcs* and produce *story lines*. In factual entertainment and talent shows, the narrative arc is based on the *journey* that contestant makes and which, in the most dramatic cases, transforms their lives. This can include a process of self-discovery (e.g. *Wife Swap*, *Who do YouThink You Are?*), the opening up of a new career (e.g. *Masterchef*), better understanding of some global issues (*Blood, Sweat And…*) and of course the journey to global stardom (*Got Talent*, ***Idols*** and *The X Factor*).

Drama is also created with *trigger moments* (also known as 'jeopardy' moments). In reality TV, such moments are produced by unexpected twists or nomination nights. In quiz shows, jeopardy is generated with questions worth a large sum of money. In talent shows, such moments occur when the presenter announces the outcome of the public vote. The drama that is on display in these programmes is similar to scripted entertainment. The main difference lies in the way these stories are produced: it is the engine of the format that helps create the narrative as a programme progresses, whereas in fiction, the story is written first and then played out.

Another dimension of formats is that they are *inherently* transnational. Indeed, since the license of a show cannot be bought twice in the same territory (for the same period of time), *a programme becomes a format only once it is*

adapted outside its country of origin. According to Michel Rodrigue, one of the industry's founding fathers:

> A format is not a product, it is a vehicle, and thus the only *raison d'être* of formats is the international market. […] the format is a vehicle which enables an idea to cross boundaries, cultures, and so on, and to be localized in every place where it stops (Rodrigue, interview 2008).[1]

When a show is adapted, its concept is not the only element that crosses borders: formats constitute a significant *transfer of expertise*. Format purchasers – the licensees – obtain a document that is known as the 'bible', which has several purposes. Bibles teach local teams everything they need to know in order to produce the show. They run to hundreds of pages and contain information about run-throughs, budgets, scripts, set designs, graphics, casting procedures, host profile, the selection of contestants, and every other possible aspect associated with the show's production (EBU 2005; Moran 2006).

Bibles lay out format rules. Local producers can be allowed to alter the 'flesh' of a format but can never touch the 'skeleton'. Not many shows are successful in their home market and even fewer have international potential, therefore those that acquire a track record do so because of the very precise way in which they have been designed. An international format is geared up to hit specific points throughout the narrative and constructed to take viewers through a succession of emotional states. In this respect a format can be compared to a bridge: its architecture is not a matter of mere aesthetics but of civil engineering and those

who tamper with it risk seeing it collapse! Thus a bible is intended to protect the show's mechanics and guard against ill-thought modifications.

However, bibles do contain a certain amount of local knowledge. These documents are constantly updated with information accumulated in the territories where the show is produced. If an idea that is tried in a market works, it is passed on; if it fails, licensees are warned against it. As Sue Green, an industry veteran, explains, a format is a show that has 'been debugged' to remove 'the mistakes that have been made that won't be made again' (Green, interview 2010). And therein lies one of the economic reasons for licensing a format. As production is being refined from one territory to another - and from one year to the next - costs are gradually driven down. The refinement of the model, which is consigned in the bible, constitutes one of the key economic benefits of format licensing.

Information is also passed on by consultant producers (sometimes known as 'flying' producers), whose role it is to help local teams set up the show. They will stay on site for up to two weeks, depending on the complexity of the production, spending time in pre-production, production and in the studio. If the show is still produced in its country of origin, local teams can be invited to visit the original set (Jarvis, interview 2008).

A successful transfer of expertise is in the interest of all. Formats are bought with the hope of a ratings success and licensees need to understand the show's principles as well as they can. But obtaining a local hit can be equally important for the vendor because a ratings failure in a major territory, even after a good launch, can damage a format's prospects. Indeed, the heads of acquisitions and programming that scan the world TV market quickly lose interest in a show if

they sense any sign of weakness (Clark, interview 2008).

Thus, formats operate in an international market of interdependent territories: they do not merely cross borders, their performance across borders determines their fate. Formats' transnationalism is further underlined by their hybrid nature, since they adapt as they travel. In many instances, the knowledge acquired in different territories helps to refine the rules that make a format a unique show.[2] In light of this discussion, I suggest the following definition: *a format is a show that can generate a distinctive narrative and is licensed outside its country of origin in order to be adapted to local audiences*.

TV formats before the global shift

Adaptations - legally licensed or not - have been around since the early days of broadcasting.

An early sound broadcast format was a comedy panel show called

The world's first international adaptation was a comedy panel show *It Pays To Be Ignorant*, which first aired on CBS radio in 1942. The BBC paid a music impresario named Maurice Winnick £50 per programme for the right to use the American scripts in a British adaptation re-titled *Ignorance Is Bliss*. It first aired on 22 July 1946 on the BBC's Light Programme and went through several series until 1953.[3]

The next show to cross the Atlantic was *Twenty Questions*, which was owned by WOR radio station on Broadway, New York. It aired on the BBC Light Programme for the first time on 26 February 1947.[4] *What's My Line?* was the world's first format to debut on television. It premiered on CBS in February 1950

(Schwartz et al., 1999: 246), and the British version debuted on the BBC's television service on 16 July 1951, with Maurice Winnick acting as agent again.[5]

These deals set the scene for the 1950s and 1960s, when the format trade essentially consisted of American shows travelling east to Europe, west to Australia and south to Latin America. Formats did not travel in the opposite direction until CBS adapted, with great success, a BBC sitcom called *Till Death Us Do Part*, which premiered on the American network in January 1971 as *All in the Family* (Rouse, 1999).

Over the next two decades, no more than a handful of companies were involved in the fledging international format trade. The first was Fremantle Corporation, an international TV distribution company established by Paul Talbot in 1952. Talbot began selling ready-made TV shows and his breakthrough with formats - also a giant leap for the trade itself - came in 1978 when he obtained the representation of the Goodson-Todman catalogue in Europe and the Middle East (Usdan, interview 2010). When Talbot added other US producers to his catalogue, the international merry-go-round of American game shows began in earnest. The first wave of formatted entertainment included shows that would become TV classics in many markets, such as *The Dating Game*, *Family Feud*, *The Newlywed Game*, *To Tell the Truth*, *Password* and *The Price is Right* (Guider, 2005). By the late 1980s, Fremantle had become 'Europe's largest supplier of game shows with 43 different series in production in nine countries'.[6]

Another format pioneer was Reg Grundy who began adapting US game shows for the fledgling Australian market in the late 1950s (Moran, 1998: 42). His company internationalized in the late 1970s notably when he acquired the

representation of the Goodson-Todman catalogue outside Europe and the Middle East (Moran, 1998: 45-6; Usdan, interview 2010). Grundy Worldwide - the first company to set up a global network of production companies - was particularly successful in Europe, selling game shows such as *Sale of the Century* and *Man O Man*, and adapting two Australian soaps *The Restless Years* and *Sons and Daughters* in various European markets (Moran, 1998).

Action Time was among the first European companies to get involved in the format trade. It was established in 1979 by Jeremy Fox who left Granada to set up as an independent game show producer. Whilst at ITV he had created *The Krypton Factor* and when the broadcaster went on strike he took the tape to America. The US version was picked by ABC and *The Krypton Factor* became one of the first foreign game shows to be purchased by an American network. Once in the USA, Fox was offered American shows, and he started importing formats in large numbers, including *Catchphrase* and *Truth or Consequences*, the latter being one of the key sources for *Game for a Laugh*, a popular 1980s light entertainment show (Schwartz et al., 1999: 121-2, 236-7; Fox, interview 2010). Fox only adapted US formats to the UK, but his successors Stephen Leahy and Trish Kinane (who took over in 1988) expanded sales to Europe and international hits included *The Alphabet Game* and *You've Been Framed*! (Fry, 1995; Kinane and Leahy, interview 2010).

Finally, two Dutch production companies, Joop van den Ende's JE Entertainment and John de Mol Productions became involved in the format business at an early stage. Van den Ende, a TV producer with roots in theatre, began selling home-grown and acquired formats in the Netherlands and Germany,

with a few deals in Southern Europe, in the early 1980s. JE Entertainment adapted several Dutch studio-based programmes (notably *The Honeymoon Quiz* and *The Soundmix Show*), and UK drama series (including Thames Television's *The Bill* and London Weekend Television's sitcom *The Two of Us*) in various markets (Fuller, 1993; Bell 1994; Moran 1998: 33-4). John de Mol Productions was a younger company but was equally active in the format market in the 1980s, selling shows like *Love Letters* and *All You Need Is Love* - two programmes that prefigured reality TV – in about five European markets (Bell, 1994; Moran 1998: 34-5). The two companies merged in January 1994, creating Endemol Entertainment, a company that was soon to play a key role in the globalisation of the format market (below) (Moran 2006: 91-4; Smith and Life, 1993).

By the 1990s, the format business was characterised by the following features: the backbone of the trade consisted of game shows, many of them American. The USA exported many of its shows, as seen above, and imported none (Table 1). The UK, the Netherlands, France and Japan were among format exporters, but not on the scale of the USA. Then, formats travelled slowly. *The Price is Right*, which premiered on 26 November 1956 (CBS), waited nearly three decades for its first overseas adaptation. *Jeopardy!*, another classic US game show, had travelled only to Australia, the UK, France and Italy by the late 1980s. *Family Feud*, which launched on ABC in 1976 and is today licensed in about 30 territories, was in only a handful of countries before 1990 (Gilbert, interview 2008; Jarvis, interview 2008; Usdan, interview 2010).

The *format flow* remained modest in size because few companies were

involved in the trade, relatively few shows were formatted for export, and those that were travelled to a limited number of territories. Formats essentially circulated between the USA, Western Europe and Australia. As Table 1 indicates, East European countries and the rest of the world imported relatively few formats. Thus, a show exported to more than 10 countries was considered a great success, and only a handful exceeded this number.

Table 1: number of home-grown v. imported game shows

	USA	UK	France	Italy	Spain	Germany	Holland	Eastern Europe	Africa	Australia	Asia (incl. China)	Japan	Latin America
Total number of game shows	34	24	11	10	7	16	9	9	15	7	30	30	14
Home grown	34	9	4	2	0	3	5	6	13	0	23	30	12
Imported format	0	15	7	8	7	13	4	3	2	7	7	0	2

Source: adapted from Copper-Chen, 1994: 270-289.

All this changed at the turn of the 21st century, when the format trade went global. Trade figures exploded: the number of formats in circulation, the number of territories they travelled to, the number of companies involved, and the volume and speed of business. This new era was heralded by four 'super-formats'.

The four 'super-formats'

The notion of a 'super-format' was developed by Peter Bazalgette (2005), and he defines it as formats that 'break new ground' in terms of originality, world domination, and cash generation (Bazalgette, interview 2009). The four super-formats described in this section certainly benefited from the new circumstances that began to shape the broadcasting industry in the late 1990s (below), but the

men behind them also helped to change this industry by translating these circumstances into creative projects, thereby highlighting the strategic importance of formats.

Millionaire: The game that re-wrote the rule book

Who Wants to Be a Millionaire? was developed by David Briggs, Steve Knight, Mike Whitehill and Paul Smith, all working for Smith's production company, Celador (Bazalgette 2005; Moran 2006: 51-5). When the show premiered on ITV (UK) on Friday 4 September 1998, it opened up a new era in the history of formats. By Monday morning, Smith learnt that the show had attracted a 44 per cent of audience share, and by the afternoon his PA was getting enquiries from all over the world. Within seven days they had collected 40 applications from interested buyers (Smith, interview 2009). The first deal was signed with Australia's Channel 9 because a contingent from the network had literally camped in Celador's reception and Smith felt that they 'had demonstrated their commitment to the show' (ibid.). Processing approximately one application a week, at least 35 deals were signed within a year and the format had reached 108 territories just before its tenth anniversary, breaking all previous records (Spencer, interview 2008; Smith, interview 2009).

Millionaire became a planetary success because Smith injected a large dose of drama into the game show genre. The first pilots of the show, which Smith had struggled to get commissioned, looked like a Bloomberg screen. Around the tiny video box showing the host and contestant, were the money tree, the lifelines, the question and the four possible answers. The show was ready to become a hit once

all these elements were stripped away to focus on the drama that was being played out on screen (Spencer, interview 2008). Contestants would have *two* cameras trained on them, filming close-ups of their agony as the stakes rose:

> the most dramatic thing is to look at a close up of that person when they're under pressure. And so there's two permanent close-up cameras, one with a close-up of the face, and the second one with a slightly looser shot with, down the right hand side, … the various information about where they are and the ladder as to how far they've climbed up, and also what lifelines they've used. And the director can choose either one at any time, either to provide the drama or to remind people at home exactly what part of the programme a person has managed to get to (Smith, interview 2009).

Millionaire was also the first *branded* international TV show. Only minute local variations are allowed on the show as most aspects are defined in the bible, including the music, opening titles, type of host and questions, studio set, lighting, even down to the camera movements. This policy was dictated by a necessity to protect the show's mechanics but also by the need to guard the coherence of the brand across markets. This mattered more than ever before because Smith had had the foresight to retain the show's ancillary rights (those connected to licensing and merchandising). Thus in any given territory, the TV broadcast and ancillary rights were sold separately, and the local producer would only be given about 10 per cent of the revenue derived from the ancillary rights (Smith, interview 2009). *Millionaire*'s merchandising was comprehensive and expanded to 140 product

lines – from board games to Christmas crackers - and at one stage represented 40 per cent of the format revenue. The television show was simply considered a shop window for all the merchandising behind it (Spencer, interview 2008). Both in terms of international reach and exploitation of intellectual property, *Millionaire* set new benchmarks in international television and was a true game changer for the industry.

Discovering a new planet: Reality TV

The (short) histories of reality-based programming and the format industry became entwined in the late 1990s, when *Survivor* became one of the world's most successful TV franchises. The show was developed by Charlie Parsons and his creative team at Planet 24, then a small British independent company he controlled alongside Waheed Alli and Bob Geldof.

Survivor's revolutionary idea was its eliminating procedure, whereby contestants voted each other out of the game week after week. Parsons later explained that they hit upon this mechanism of voting out – as opposed to a phone vote that can be unreliable and unfair - because 'it wasn't about people being eliminated, it was about who was the hero [and] who would win at the end' (Parsons, interview 2009a). The mechanism formed an essential part of the show's engine because it began to dictate contestants' behaviour as to who formed alliances and conspired against each other, delivering drama and tensions on a daily basis.

Gary Carter - at the time head of Planet 24's international sales team and who became a pivotal figure in the format industry - struggled to sell the show to

broadcasters who could not visualize the drama of a bunch of people on a beach. He managed to sell two multi-territory options to Endemol and Strix in 1994. Endemol did nothing with it but Anna Brakenhielm, at the time head of Stockholm-based Strix, eventually convinced the Swedish public broadcaster to commission the show. SVT called it *Expedition Robinson* and it became a great ratings success in Sweden. Brakhenhielm subsequently sold the show to Norway, Denmark and then Germany (Carter, interview 2008; Brakenhielm, interview 2009).

It would take another three years for the show to air in America, where the rights were picked by Mark Burnett, the creator of *Eco-Challenge*. He began production in March 2000 in Borneo and the show premiered on CBS two months later. The many millions of dollars spent on production and the 400-strong crew involved in the making of each episode helped the show to become a ratings sensation, where the second series beat *Friends* on a Thursday night (Burnett, 2005: 119). The glossy US version prompted broadcasters worldwide to get hold of the show's local rights, and the format eventually acquired a geographical footprint of about 40 territories in the first half of the 2000s. By 2009, there were 43 local versions of *Survivor*, which covered 73 territories because of two pan-regional versions in Africa and the Middle East (Parsons, 2009b). But unlike *Millionaire*, it took the best part of the 1990s before the show turned into an international success.

Big Brother

Whilst *Survivor* is a hybrid between game show and reality TV, *Big Brother* - at

least in its original conception - is more firmly rooted in the observational genre of reality television. It became a global ratings hit and a cultural phenomenon because it was an original idea that pushed the boundaries of acceptability. *Big Brother*, which was devised by John de Mol and his creative team at Endemol, launched on 17 September 1999 on Veronica, a Dutch free-to-air channel. In the Netherlands - as in all the territories it travelled to - the show faced a barrage of criticism and moral outrage (Bazalgette, 2005). De Mol, however, expressed different views when he addressed his team on launch day:

> Guys - *Big Brother* will be for Endemol what Mickey Mouse is for Disney. We are working on something that is going to be huge: twenty years from now, talking about television, they will talk about TV before *Big Brother* and TV after *Big Brother* (in Bazalgette, 2005: 143).

The pep-talk was hyperbole but it is undeniable that ten years on *Big Brother* has had a significant impact on world television. About 30 licenses were sold by the mid-2000s, including two pan-regional versions in Africa and the Middle East (where the show was taken off air after a few days) (ibid: 287-90). Since then, the show has reached its 10th season in many important TV markets including Brazil, Germany, Italy, Spain, UK and USA.

Big Brother was also the first format to be a multimedia brand that can be declined on numerous platforms: terrestrial television, cable channels (24-hour coverage and complementary shows), online and via hand-held devices. And since the show contains many interactive features, each platform was successfully

turned into an income stream (Bazalgette, 2005, 2009).

Pop Idol: Opportunity Knocks again, again, and again!

The last super-format that helped turn the fortunes of the trade was *Pop Idol*, as the original version was named in the UK. *Opportunity Knocks* - a programme first aired on the BBC Light Programme in February 1949 that went on to become a TV success - is often referred to as the first talent show, but the genre is older. The first such show was, quite likely, *Major Bowes and His Original Amateur Hour*, which began on WHN New York in 1934 and moved to the major radio networks (NBC, CBS and ABC) in subsequent years (Buxton and Owen, 1972: 192-3). Interestingly, the host struck a gong 'to indicate that the contestant had met defeat' (ibid.). In Britain, *The Carroll Levis Show*, that aired 1942 to 1954 and 1956 to 1960 on the BBC Light Programme, also put amateurs before a panel of judges.[7]

Today's talent shows are reality-skewed in the sense that they include behind-the-stage scenes and place more emphasis on emotions and the contestants' journey, occasionally prompting the tabloid press to delve into their private lives. The first such show was *Popstars*, a programme conceived by Jonathan Dowling that debuted in New Zealand in 1999. The show had no studio element and followed a nationwide search to form a band (TrueBliss), from the first audition to the recording of their first single. The concept was acquired by Screentime, an Australian production company, that produced the show at home and then sold the rights overseas. In Europe, it debuted on ITV in January 2001 and by summer 2002 it was already in 40 territories (George, 2000; Timms, 2001; Beale,

interview 2008; Jackson, interview 2008).

However, *Popstars* was not re-commissioned in many countries and was soon eclipsed by a show in search of a solo artist: *Pop Idol*. The show was devised by two music industry executives, Simon Fuller and Simon Cowell, and developed by Alan Boyd and his team at Thames Television (Boyd, interview 2009). *Pop Idol* premiered on ITV in the UK in October 2001 and, once it was picked by Fox in the USA, it travelled around the world in an instant. By autumn 2008, 41 licenses had been sold, two of them, the Middle East and Latin America, covering 50 territories between them. The US version, *American Idol*, has sold in over 180 countries to date (Clark, interview 2008).

Influence and legacy

All four super-formats have had an extraordinary impact on international television. Until their emergence, the format as a mechanism for international distribution was relatively unknown in the TV industry. It was associated with game shows, a genre stuck at the bottom of the hierarchy of TV genres which many in the industry would rather not get involved with. When these formats swept the world, it shifted attitudes and many TV executives drew plans to get a piece of the action.

Each format also delivered a message. *Millionaire* established two key principles of a successful global TV franchise: internationally consistent branding and the ability to exploit the intellectual property attached to the brand for revenue generation. *Big Brother* was a master-class in multi-media story-telling and multi-platform revenue generation, and *Idols* showed how a format's local version could

perform well on the international market as a ready-made TV show.

Furthermore, these formats' key points and mechanisms have been borrowed so many times and are the source of so many other shows that they have helped to re-define several TV genres. Most contemporary game shows display *Millionaire*'s 0151multi-choice answers and sense of drama and, as rightly observed by Peter Bazalgette, *Survivor*'s elimination procedure 'was to dominate most successful reality shows for the next decade' (2005: 83). *Idols* is, of course, the model and inspiration behind most contemporary amateur talent shows.

The format flow in the global age

These super-formats opened up a new period for the format trade. Within a few years, a business that had been confined to a few territories became global and a trade that was confined to the margins of the TV industry acquired a strategic priority for many companies. The shift was profound and radically altered the structure, scope and pace of the international format flow.

Whilst in the past only a handful of formats sold in more than ten countries, today any moderately successful format is expected to sell in the USA, Australia, the 'Big Five' European markets (Italy, Spain, France, Germany and the UK), Benelux and across Scandinavia. The best performers sell over 30 licenses and cover all world regions.

Secondly, the number of companies involved in the production and distribution has gone up from a handful to a few hundred. An event focusing on formats organised in Cannes the day before MipTV in April 2010 – the world's largest international TV programming market – was attended by more than 300

companies from 54 countries.[8]

Thirdly, an ever increasing number of shows are formatted for the international market. FRAPA's last three-year survey (2006 to 2008) tracked 445 formats that led to 1262 adaptations in 57 territories (FRAPA, 2009: 11). In sales terms, the format business was estimated to be worth about €2.1 billion per year in the three-year period between 2002 and 2004, climbing to approximately €3.1 billion per annum in the last survey (ibid: 17).

Fourthly, as seen above, formats used to travel slowly. Today, there is no set standard for international roll-outs and some formats still go round territories at a moderate pace. For instance, it took a decade for *A Farmer Wants a Wife* – shown on ITV in the late 1990s – to reach 15 countries, because TV executives took a while to realize that this show is popular with the young urban audience that they all want to reach (Clark, interview 2008). However, formats can also travel at lightning speed. *Dancing With the Stars* (BBC Worldwide) was in more than 30 territories a few years after it was put on the market in the early 2000s, even though it is a show that is expensive to set up. *The Weakest Link* was in nearly 70 territories less than 18 months after its launch in August 2000 (Jarvis, interview 2008). Endemol's *Deal or No Deal* was in nearly 50 territories within a few years of its launch (Endemol, 2007: 18). Distraction's dating show *Love, Bugs* rapidly reached almost 40 countries and was produced in territories as diverse as Finland, Ukraine, Hungary, Lebanon, Israel, Indonesia and Mexico (Rodrigue, interview 2008). One of the fastest selling formats today is *Hole in the Wall*, which FremantleMedia had sold to 31 territories in less than 18 months by the end of 2008 (Clark, interview 2008).

Finally, whilst the first era of the format trade revolved around game shows contemporary formats embrace all genres, including scripted programmes, factual entertainment, magazines, talent contests, comedy and panel shows. In the early 2000s, game shows still constituted nearly half the total hours of format programming, and reality TV (including factual entertainment) less than a third (see Table 2).

Table 2: Total hours of format programming by genre

	2002	**2003**	**2004**	**Total**
Game shows	6,754	7,138	7,655	21,546
Reality TV	2,958	3,848	3,608	10,414
Scripted entertainment	625	731	928	2,285

Source: Rodrigue, 2007: 24.

In the second half of the 2000s, formats' predominant genre turned out to be factual entertainment, just ahead of game shows (Table 3). 'Factual' – to follow FRAPA's categorisation - is a very broad church that includes the life swap genre (*Faking It*, *Trading Places*, *Wife Swap*, etc.), makeover/coaching (*How to Look Good Naked*, *Supernanny*, etc.) and observational reality programming (e.g. *Come Dine With Me*, *Who Do You Think You Are?*). 'Reality' essentially consists of game shows shot on location such as *Survivor*, *The Apprentice* and *The Bachelor*. Scripted entertainment includes drama, soaps, telenovelas, sitcom, and scripted reality (e.g. court reconstructions with actors) (FRAPA, 2009: 19).

Table 3: total number of exported episodes, by genres, 2006-08

	2006	**2007**	**2008**	**Total**
Reality	1,185	1,335	1,265	3,785
Factual	7,452	7,988	8,322	23,762
Talent	1,222	1,330	1,170	3,722

Gameshows	5,486	6,846	7,302	19,634
Scripted	2,781	2,972	3,188	8,941
Other	662	677	671	2,010
Total	18,788	21,148	21,918	61,854

Source: Adapted from FRAPA 2009: 20.

The world's leading exporter of formats by a comfortable margin is the UK, followed by the USA and the Netherlands (table 4). The UK also leads in terms of exported hours (4,929 hours of exported formats in 2008, against 4,638 hours for the USA and 2,464 for Argentina), and in the number of exported episodes (5,977 episodes exported in 2008 against 5,538 for the USA and 2,387 for Argentina (FRAPA, 2009: 13-14).

Table 4: number of imported and exported formats by territory (2006-08)

	2006	**2007**	**2008**	**Total**		**2006**	**2007**	**2008**	**Total**
Argentina					*Japan*				
Imported formats	4	4	4	12	Exported formats	1	0	0	1
Exported formats	16	19	20	55	Imported formats	6	11	12	29
Australia					*Netherlands*				
Imported formats	20	23	22	65	Imported formats	35	36	32	103
Exported formats	10	11	12	33	Exported formats	20	20	23	63
Canada					*Norway*				
Imported formats	10	20	17	47	Imported formats	19	20	30	69
Exported formats	7	4	4	15	Exported formats	4	2	3	9
Denmark					*Spain*				
Imported formats	22	9	24	55	Imported formats	42	47	48	137
Exported formats	7	7	6	20	Exported formats	7	10	12	29
France					*Sweden*				
Imported formats	46	32	44	122	Imported formats	15	20	22	57
Exported formats	12	12	12	36	Exported formats	10	15	16	41
Germany					*UK*				
Imported formats	39	40	42	121	Imported formats	21	25	20	66
Exported formats	14	11	12	37	Exported formats	84	93	98	275
Italy					*USA*				
Imported formats	35	42	39	116	Imported formats	36	39	41	116
Exported formats	7	3	9	19	Exported formats	47	56	56	159

Source: FRAPA analysis of The Wit data, FRAPA 2009: 11.

Understanding the new era

The question remains: why did the super-formats sweep the world in the late

1990s and why did this shift in international TV production occur so rapidly? What transformed a fifty-year old trade into such a fashionable and global phenomenon? As always, profound change was triggered by a powerful congruence of factors.

Formation of a programming market and rise of the production sector

In Europe, the number of TV channels grew exponentially in the closing decades of the last century. Until the early 1980s, most territories were served only by a handful of stations - usually those of the sole authorised public service broadcaster. The liberalisation of policy regimes expanded the pool of players, and digitisation brought cable and satellite platforms able to carry channels by the hundreds (Collins, 1998; Chalaby, 2009). The fledgling broadcasters had a pressing need for images and often filled the void with cheap imports from Hollywood's back catalogue, complemented by Australian soaps and telenovelas. As competition grew, these broadcasters realized that imports would not carry them very far in terms of ratings. And as they discovered that a higher audience share demanded local content they had no choice but turn to local programming. By the second half of the 1990s, domestic production was rising and the proportion of imported programming was falling in all of Europe's key markets, including Spain, Italy, Germany and the UK (Rouse, 2001: 38).

Local programming, however, is not bulletproof: it requires both capital and expertise and there is no guarantee of success. The local adaptation of foreign shows helped broadcasters to bridge the gap between demand for local programming and resources (Rodrigue, interview 2008). In addition, formats

come with a track record, sometimes highlighted in a ratings bible that summarizes the show's performance in various territories and time slots. Thus a successful format offers a *proof of concept* that guarantees – to a certain extent – a level of performance.

The thousands of channels that air in Europe have created a *programming market* that is worth £3.3 billion - the sum spent by European broadcasters on acquiring formats and ready-made shows in 2009.[9] An industry has developed to serve this market: *the independent TV production sector*. In the last decade, many of the world's greatest formats – including all four super-formats – have been devised by independent production companies. These businesses are especially creative because, unlike broadcasters that serve the advertising market, they are specialist suppliers to the programming market. Their survival depends on their creativity, a fact that tends to focus the minds of their executives.

Europe's three leading production companies are FremantleMedia, Endemol and Zodiak Entertainment, with annual turnovers ranging from £0.5 to and 1 billion (*Broadcast* 2010; Chalaby 2010; Potter 2008). The independent production sector is particularly vibrant in the UK, where the policy regime has been adapted to suit the legitimate demands of TV producers. The Code of Practice that came into effect in 2003 enabled producers to keep all the content rights that are not explicitly purchased by broadcasters. Under this new intellectual property (IP) regime, production companies retain the IP attached to their programmes, and it is thus in their own interest to wring their assets to the last drop (Ofcom, 2006; McVay, interview 2009). One such strategy consists in exploiting a show on the international market, and the most efficient way of doing so is to turn it into an

adaptable and repeatable format.

Most UK-based production companies have developed an international footprint and are behind some of the most memorable formats of recent years, including *Who Do You Think You Are?* and *Supernanny* (Shed Media), *Faking it*, *Wife Swap,* and *Secret Millionaire* (RDF Media Group, now part of Zodiak Entertainment), and *The X Factor* and *Got Talent* (Syco TV). But the European production sector includes hundreds of fast-growing companies that are increasingly active on the international market (*Broadcast*, 2010).

The format industry would not be truly global, *Millionaire* would not have reached more than 100 territories, had the TV industry not developed in leaps and bounds in most other world regions. Since the 1990s, technology (particularly communications satellite) and the process of democratization have spurred the growth of broadcasting in regions as diverse as Eastern Europe, Africa, Middle East, South East Asia, and China (Sinclair, 1999; Page and Crawley, 2001; Sakr, 2007). Indeed, the BRIC countries for example (Brazil, Russia, India and China) have turned out to be avid format consumers and have begun to offer their own ideas to the world TV market (FRAPA, 2009).

Global information flow

Correspondence in the BBC Written Archives between BBC executives and the agents selling US formats is a reminder of just how cumbersome transatlantic communication was in early days of the trade. In some of the letters and cables these men exchanged they were chasing the one and only recording of a show. It could take weeks for these 'kinescopes' to change hands, crossing the Atlantic on

board ocean liners.[10]

The pace of the trade quickened as developing communications technologies facilitated the exchange of information worldwide. When Endemol expanded internationally they set up a stringers network that observed key markets and reported back to the company's top executives on a monthly basis. In the early 2000s, they installed an intranet and so managers at the Hilversum headquarters near Amsterdam could watch programmes that had been broadcast the night before in Brazil or Japan (anonymous source, 2010). Today, all global TV production companies possess digital file-sharing systems that feed the internal flow of information, complemented by email newsletters and online services from information suppliers to the industry. YouTube is another information source and a few formats, such as the popular *Hole in the Wall*, were discovered on Google's video sharing website (Clark, interview 2008).

In July 1953, the BBC received a letter from an advertising agency based in Buenos Aires enquiring after *Twenty Questions* - more than six years after the programme had first aired on BBC radio (above). Today, the same process could take less than a week, and the advertising agency would have contacted the programme's rights holders directly.[11]

Conclusion: Entertaining the world

Cultural artefacts have always attracted interest across frontiers. Paintings, novels, symphonies, films and TV series have had an international audience for a long time. Formats democratize and expand this principle to embrace popular TV culture, serving TV entertainment to a global audience.

It is tempting to think that formats have contributed to homogenize world television (Waisbord, 2004). However, whilst a few formats go round the world pretty much unchanged, many more sell between five and ten licences each. Competition among originators and distributors is intense and broadcasters have hundreds of formats to choose from. National audiences differ and make their own distinctive viewing choices, resulting in an assortment of programmes that always differ from one territory to another. In addition, formats travel precisely because they adapt to local tastes, bringing together elements and languages from different cultures. Above all, the format industry enables relatively small countries with a thriving TV culture to make their voices heard beyond the confines of their borders. It has given the opportunity to territories such as Quebec, the Netherlands, Sweden and Japan to communicate their ideas to a worldwide audience. Formats are like bridges, not merely because they are precisely engineered, but they help cultures reach out to one another.

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(Company names and job titles at time of interview)

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[1] Translated from French by author.

[2] Even for game shows, a genre where licensees are usually allowed little variation, local knowledge can enrich a format. Several recent challenges on *The Wheel of Fortune* have originated outside the USA, and *Survivor*'s licensees's frequently exchange new challenges (Gilbert, 2008; Parsons, 2009b).

[3] File R19/526, Entertainment, *Ignorance is Bliss*, 1945-1953, BBC Written Archives.

[4] File R12/230/1, Copyright *Twenty Questions* 1947 – Feb 1948, File 1A; R12/230/2, Copyright *Twenty Questions*, March 1948 – 1950, File 1B.

[5] Contract between Maurice Winnick and Miss M.T. Candler, Head of Copyright, BBC, 29 June 1951, in R12/239/1, Copyright *What's My Line?,* 1951-Oct. 1952, BBC Written Archives.

[6] PR Newswire, 'Interpublic to buy substantial minority interest in Fremantle', 21 April 1989.

[7] R19/639, Entertainment, Levis, Carroll Programmes, 1942-1954; Carroll Levis (II) (1947-62), BBC Written

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[8] *The C21 Formats Lab Weekly*, 26 March 2010.

[9] The European Audiovisual Observatory's MAVISE database counted 7,630 TV channels in September 2010. See http://mavise.obs.coe.int/.

[10] E.g. cable from N.G. Luker, at BBC's NY office, to A.H. Cop, at the BBC in London, 27 February 1951, R12/239/1 Copyright *What's My Line?*, 1951-Oct. 1952, BBC Written Archives.

[11] In R12/230/2, Copyright, *Twenty Questions*, March 1948-1950, File 1B, BBC Written Archives.