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Welcome to our new colleagues, be ready for the MIP

[Exclusive]

What is driving the audience success?

[Meet the Eurodata TV Worldwide Team]

Find out where you can meet and greet the team over the coming months

[Interview]

Our clients and partners report on their successes, projects and relationship with Eurodata TV Worldwide.

Kantar Media Spain – Mariayun Martin de los Rios A. – Commercial Director media
– **Eduard Nafria** – Insights and Business Development Director – Spain

[What's new?]

What about the most successful fall season channels strategies?

The fall season is a usual period for broadcasters to test different scheduling strategies, especially in access and primetime. Some channels bet on an important number of new series, others reinforce the value of a genre.

What's new in kids' programming?

Over the past few months, children's channels have put game shows at the heart of their programming.

The notions of fun and challenge were brought to another level in brand new shows.

[New on the air]

AMAZONES

The documentary series is directed by Filip Lenaerts, who also directed "Tytgat Chocolat" and "De Herontdekking Van De Wereld". In the first episode, Phara de Aguirre explores Israel and Palestine, where a conflict has been raging since 1948. She talks with Palestinian resistance fighters and women of the Israeli army to listen to both sides of the story.

THE LOOMING TOWER

The series is toplined by American actors Jeff Daniels ("Godless", "The Martian") and Peter Sarsgaard ("Wormwood", "The Magnificent Seven") and French actor Tahar Rahim ("A Prophet", "Panthers"). Based on Lawrence Wright's Pulitzer Prize-winning non-fiction book, the series tells the back story of September 11.

DE WERELD VOLGENS 80-JARIGEN

"De Wereld Volgens 80-Jarigen" is produced by Talpa, the company that produced "The Voice" and "Dating in the Dark". It follows the success of the reality "Around the World With 80-Year Olds" where senior traveled the world to discover new countries and cultures.

Welcome to our new colleagues, be ready for the MIP

With new challenges for the TV industry and an increasing number of clients, EurodataTV team is pleased to welcome new expertises.

Let me first introduce you to Jennifer Aubine, who joined the sales team in March. Jennifer has been working during 7 years at TF1 channel, in the interactive marketing department and more recently in the Audience & Research Department. She now oversees customers from France, Belgium, the Netherlands and Luxembourg.

Alann Kervoelen will also be a new asset to our team as International TV Manager in charge of the Analytics team. Alann has worked for Nielsen for five years, first as a Data Analyst, then as a Marketing Consultant for four years.

In April, we will actively participate to **MIPFormats & MIPTV**, conferences focus on new trends and strategies about the worldwide TV market. On Saturday 7th April, I will act as part of panel **"The bigger role of data and audience measurement"**. Don't miss also **"The next viewing trends"** by Avril Blondelot, our Head of Content Insights, who will share the latest key facts about format's innovative trends and successes, the Sunday 8th April at 09:40am.

Eurodata Team and Paul Youngbluth from the company Tape Consultancy will be opening MIPTV for the third time. The Monday 9th morning at 9.30am, we will introduce you **"One TV year in the world: cracking audience trends"**. During this presentation, we will offer a strategic and in-depth analysis of TV & online video consumption as well as some insights and on the latest format's trends and contents locally broadcast or internationally exported, a must-see conference!

For more information on any of the MIPFormats or MIPTV conferences mentioned above just [click here](#).

As usual, we will be happy to welcome you at our stand (P-1 C.56).

We look forward to seeing you at MIPTV!

Best regards,

Frédéric Vaulpré,
Vice President of Eurodata TV Worldwide



Find out more about our insight reports:

- **NOTA International TV Trends:** The latest programming & audience ratings trends in leading TV markets
- **The Kids' TV Report:** International Kids' TV consumption & hits
- **The Scripted Series Report:** Trends & hits in Fiction over 13 leading TV markets
- **The Entertainment Report:** Entertainment programming strategies in leading TV markets
- **4Screen Report:** Comprehensive overview of multiscreen content and strategies
- **Yearly Sport Key Facts Report:** TV consumption on major sporting events
- **One TV Year in the World:** A worldwide overview of TV Landscapes, TV Viewing and favourites TV Programmes
- **The Young Adults Report:** A clear understanding of one of the most volatile target groups in television

What is driving the audience success?



At TAPE, our focus is on **understanding audience behaviour**, and **interpreting how the content of programmes satisfies viewer needs**, so to us, the extraordinary explosion of content choice now available in this digital, multi-platform world is both exciting and somewhat daunting.

Exciting, as not only is the choice much greater than ever before, but the quality of the programmes on offer is also incredibly high, and also truly international in origin, but daunting, in the sense that trying to predict audience behaviour is inevitably more challenging. Not only do we, as **viewers have more channels and platforms to choose from than ever before**, but we are also now no longer tied to linear schedules, and are able to watch what we want, whenever we want to.

While one obvious outcome of more choice is that **viewing becomes fragmented**, it doesn't mean that viewing levels for all shows necessarily suffer. In fact, we are actually seeing that some programmes are actively benefiting from this new-found freedom, and ability to time shift, while others are breaking through as a genuine appointment view, and attracting big live audiences. Furthermore, those programmes are delivering because they **satisfy viewer needs** that have remained essentially unchanged, but they are doing so in a way which feels fresh and contemporary.

To illustrate, I identified three shows at the conference (two dramas and one documentary) that all debuted in the last six months and had all broken through with extraordinary success: ***The Good Doctor*** on ABC in the US, following a young man with autism and savant syndrome, but also with a brilliant medical mind, and exploring the issues and challenges he faces as he starts work as a surgeon in a major hospital; ***Liar***, the ITV UK drama exploring the fallout from a date between two single people which ends with the accusation of rape, and denial, but who is telling the truth?; and the BBC high profile natural history series ***Blue Planet II***, with its extraordinary visual appeal. All three delivered large viewing levels – in fact *Blue Planet II* was actually the highest rated programme in the UK in 2017 – and each, on the face of it, is very different.

But from our perspective, each succeeded because it is delivering on core appeal drivers that determine viewer choice, and which I summarised as Relevancy, Accessibility and Emotionality.

The Good Doctor appeals because it benefits from a lead who is vulnerable, yet skilful, innocent and socially inept, yet able to cut through and say things that others wouldn't dare to, while at the same time **solving medical mysteries**, and ultimately the lives of patients. It **delivers an emotional journey each week**. ***Liar*** is a very simple narrative, in that it follows the fallout and aftermath of a date which goes badly wrong, but as a result it is **readily identifiable**, and also **highly topical**. Moreover, it tells the story from the very different individual points of view of the two leads, keeping the viewer guessing as to who is telling the truth, and drawing them into the narrative as it shifts direction, until the guilty part becomes clear.

Finally, **Blue Planet II** delivers on a number of levels, but has particularly benefited from something that is becoming rarer in this world of individual viewer choice and “binge viewing”, a **shared viewing experience which is suitable for all ages**, and brings viewers – and especially families – together for an appointment view, which they can enjoy and interact with, while ultimately also delivering an important environmental message.

These audience drivers, and many others, are contained in TAPE’s *App.Dex* evaluation tool, launching later this year, with which we can provide informed and objective audience appeal insights on projects at any stage of the development process.



The Eurodata TV Worldwide team is constantly travelling around the world to meet our clients/partners and bring an unique insight through conferences, seminars and festivals around five continents. In the coming months you can meet and hear us at:



FILMART

Hong Kong, China
19-22nd March 2018

Bo Zhang - bzhang@eurodatatv.com



MIPFormats

Cannes, France
07th April 2018

"The bigger role of data and audience measurement" by Frédéric Vaulpré, 11:00-11:30am

Frédéric Vaulpré - fvaulpre@eurodatatv.com



MIPFormats

Cannes, France
08th April 2018

"The next viewing trends" by Avril Blondelot, 9:40 - 10:10am

Avril Blondelot - ablondelot@eurodatatv.com



MIPDrama

Cannes, France
08th April 2018

"Fast forward: Drama, the viewer's story" by Avril Blondelot and John Peek, 15:45 – 16:15pm

Avril Blondelot - ablondelot@eurodatatv.com

John Peek - JohnP@tape-services.com



MIPTV

Cannes, France
09th April 2018

"One TV year in the world: cracking audience trends" by Avril Blondelot, Frédéric Vaulpré, Paul Youngbuth, 09:30 – 10:15am

Avril Blondelot - ablondelot@eurodatatv.com

Frédéric Vaulpré - fvaulpre@eurodatatv.com

Paul Youngbuth - paul@tape-services.com



EUROCLUB

Berlin, Germany
19-20th April 2018

"One TV year in the world: cracking audience trends" by Avril Blondelot, Frédéric Vaulpré, Paul Youngbuth, 09:30 – 10:15am

Frédéric Vaulpré - fvaulpre@eurodatatv.com

Laurent Battais - lbattais@mediametrie.fr

Wherever you are in the world, we look forward to seeing you soon!

INTERVIEW

Our clients and partners report on their successes, projects and relationship with Eurodata TV Worldwide.

Kantar Media Spain – Mariayun Martin de los Rios A. – Commercial Director media – Eduard Nafria – Insights and Business Development Director – Spain



Mariayun Martin de los Rios

KANTAR MEDIA



Eduard Nafria

With regard to traditional Television, what is currently measured by Kantar Media in Spain?

Kantar Media Spain currently runs a panel of 4,755 households equipped with People Meters to measure live, time shift (VOSDAL + 7 days) and guest viewing. We also monitor programs and adverts of more than 110 TV channels.

We are also developing RPD measurement projects with the two biggest pay TV operators in Spain, Movistar and Vodafone. In total, we process data of nearly 5 million decoders on a daily basis.

Since February 2015, we measure Vodafone users' consumption on Vodafone's audiovisual services platform: linear, time shift viewing, Video on Demand and the use of interactive applications through all digital devices. **Since October 2016, we measure in a similar way the consumption of almost 4 million Movistar+ subscribers,** but also assign an individual audience to each content thanks to the Piving probability algorithm (owned by Kantar media). With more than 15 ongoing operations around the world, **Kantar Media consolidates its position as market leader in RPD measurement.**

Both RPD services complement the existing audience measurement provided in Spain. It's a great opportunity for the industry to have access to census data of millions of households in a context characterized by a growing audience fragmentation and an increasing TV offer, it allows operators to better adapt their content offer with more agility.

Besides traditional Television, how does Kantar Media measure the online viewing on PCs and mobile devices and what is the current scope of this measurement?

In April 2015, we announced a strategic partnership between comScore and Kantar Media with the aim to set up a global cross-media measurement. This project involving a great technical complexity is the first project of its kind in Spain. Its flagship product is the Cross Media Audience Measurement (CMAM).

In Spain, we have been working on this project for two years with the main TV operators (RTVE, Atresmedia, Mediaset, CCMA, Disney...) and **now we are close to a measurement that integrates both television and digital media.**

Kantar Media has progressively deployed the Virtual Meter in the TV panel to currently reach more than 5,000 devices. This digital Meter allow us to know about the digital consumption of our panelists. It therefore provides us the necessary information to calibrate it with the census data provided by comScore.

In this regard, all TV operators involved in this project have tagged their content with Streaming Tag, a comScore tag, in which a series of attributes called CMAM are defined, with all the necessary information for Kantar Media to associate this digitally consumed video content discriminated by devices with the TV broadcast related to a specific day and time on a channel.

Instar Analytics Web (IAW) is the tool developed by Kantar Media to work with side-by-side data. Currently, these data are private, meaning that each TV operator can access and consult its own consumption data, but don't share it with other operators.

The second phase of the project, called Extended TV Programs Audience, is scheduled for the second half of 2018. This solution will provide coverage data to the Spanish market, based on the calibration method mentioned above, allowing analysis of incremental coverage between both media.



WHAT'S NEW?

What about the most successful fall season channels strategies?

The fall season is a usual period for broadcasters to test different scheduling strategies, especially in access and primetime. Some channels bet on an important number of new series, others reinforce the value of a genre.

Fall season: TV channels renew their grid

TV3 in Spain as well as **Rossiya 1** in Russia were among the channels which **renewed the most their series programming**. Among the whole entertainment, factual and fiction series, 66% and 50% were new programmes on TV3 and Rossiya 1 respectively. Also, on both channels the **new launches were mainly successful**.

On TV3 in Spain, factual lead the access and primetime

The Spanish channel renewed a lot its serial scheduling, especially the first part of its access primetime. In this slot, the new daily magazine "Esta Passant", mixing information with a dose of humour, boosted the channel's average share by 46% among all individuals and 70% on the young adults over 43 episodes. Overall, **factual was the main genre broadcast on the channel**. It accounts for 86% of the series among the 3 genres, entertainment, fiction and factual. **This dominance is even more perceptible among the new fall serial launches where factual represented almost the total**. A few entertainment shows were also broadcast. They were all performing well such as the game show "My Restaurant Rocks" and the long-running comedy show "Polonia" launched in 2006 on the channel



Meantime in Russia: fiction still appeals viewers on Rossiya 1

On Rossiya 1, fiction was the main genre this fall season and represented more than 50% of the series scheduled (291 hours) in access and primetime. It even goes up to reach almost three-quarters of the scheduling in terms of new programming hours. On the channel, **scripted series are mainly mini-series broadcast daily from Monday to Thursday with 4 to 8 episodes or aired on Saturday nights**, all episode in a row. On these two slots, all series were newly launched programmes. The drama mini-series "Kacheli" was among the best launches in all individuals and young adults. It **increased the channel slot's average by 28% and 47% respectively**. Factual-wise, the genre represented one-third of the channel's grid. The only new factual series was the talk show "Andrei Malakhov Live", Rossiya 1 brought an old programme up to date, notably with a new host and a new time slot. It was a **successful strategy** as the show **increased the slot's average by 31%**.



In United States the last week of September flourish in new programmes

On the other side of the Atlantic, **American channels also renewed their programming especially during the last week of September**. CBS was one of the American network which renewed the most its grid. The two new military series "Seal Team" and "S.W.A.T." were successfully launched on CBS this fall season. Tuesday nights with investigation series "NCIS", "Bull" and "NCIS: New Orleans" were also among the best audience booster for the channels.

Several channels bet on a specific genre to renew their schedule, TV3 bet on factual in access, while scripted mini-series were still successful on the public channel Rossiya 1. **On the US networks, scripted series are still predominant, but new kind of fiction are launched**. Indeed, on CBS police-related series leave a bit rooms to military fiction

Source: Eurodata TV Worldwide - Relevant Partners / NOTA International TV Trends

All the facts and figures of these channels grids (and much more!) can be found in the Channel Strategies Analysis NoTa Report. The report was released on February 2018.

For further information on NOTA, please contact us!

Candice Alessandra - Media Consultant - calessandra@eurodatatv.com



What's new in kids' programming?

In 2017, fun and adventures were highlighted in kids' programmes with new animation and game shows, all detected on our new service, NoTa kids.

Animation at the service of humour and satire

Over the last months, **new kids' series renewed the comedy genre and offered stories based on non-verbal humour or derision**, like Superprod's *Pat the Dog*, extremely successful on the preschool target on the American and Spanish Disney Channels, as well as on Boomerang in the United Kingdom. Bingo and Rolly, the puppies from *Puppy Dog Pals*, also made their way to young children's heart on the Disney channels in the US, Russia, Italy and the United Kingdom.



The Heroic Quest of the Valiant Prince Ivandoe - Cartoon Network/Boing

In January, **Turner launched its first series produced by a Danish studio: *The Heroic Quest of the Valiant Prince Ivandoe***, a mock-epic series in 10x3' combining animation and live action backgrounds, in a style comparable to *The Amazing World of Gumball*. The series stars Prince Ivandoe, a silly young knight sent on an epic quest.

These recent successes follow the tracks of Millimage's *Molang* and Studio Hari's *Grizzly and the Lemmings*, both **non-dialogue comedies now airing in free to air in Europe**.

Game shows flourish across all territories

Over the past few months, **children's channels have put game shows at the heart of their programming**.

The **notions of fun and challenge** were brought to another level in brand new shows.

On TV Tokyo in Japan, *Yan Challenge* features children trying to beat new records from the famous Guinness World Records.



The Noise - Universal Kids (USA)

Children are expected to do their best in **The Noise** (Universal Kids – USA). Adapted from the Japanese format, **children must complete various tasks**, such as opening a bag of chips or sitting on a fart cushion – silently.

Among the new launches were several game shows directly inspired by pre-existing brands.

Produced by Turner Broadcasting System, **Ben 10 Challenge is a game show** from the Ben 10 franchise, which is already composed of 5 popular animated series. **2 teams** (made of two children and one adult like the heroic trio from the original series) **compete in mental and physical challenges** and **are tested on their knowledge** of Ben 10.

The game show was adapted in the United Kingdom, Spain, Italy and Germany and is broadcast on Boing and Cartoon Network.



Ben 10 Challenge - Boing (Italy)

In the United Kingdom, children were immersed in a Middle-Age inspired decorum in *Raven Returns* (CBBC). In this renewed version of the 2010 game show, the contestants go through physical games, such as archery and obstacle races, and rounds of elimination. Once crowned Ultimate Warrior, the winners help Raven, an immortal warrior played by actress Aisha Toussaint, and fight the evil wizard Nevar.

On Super RTL (Germany), the reboot of *Super Toy Club* brought back the race for toys: each team compete in games of skill, such as Jenga or Twister inspired games, to win toys. The best team gets to enter the last challenge, which takes in a giant toy store.

Other well-known shows have also been adapted to feature kids. In the United States, Universal Kids (previously known as Sprout) broadcasts ***Bear Grylls' Survival School***, in which a group of children are taught survival tips by **Bear Grylls' himself**, from *Man Vs. Wild* and *The Island*. In the end, the children are dropped on a mountain and must navigate their way back to graduate.



Bear Gryll's Survival School - Universal Kids (USA)

In October, the channel also premiered *Top Chef Junior*, in which 12 young chefs compete to become the best cook.

Source: Médiamétrie / Eurodata TV Worldwide / Relevant partners

For further information on the “Kids TV Report 2017” and NoTa kids, please contact us!

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AMAZONES

The **documentary series** is directed by Filip Lenaerts, who also directed "Tytgat Chocolat" and "De Herontdekking Van De Wereld". In the first episode, **Phara de Aguirre explores Israel and Palestine**, where a conflict has been raging since 1948. She talks with Palestinian resistance fighters and women of the Israeli army to listen to both sides of the story.

Belgium North – Canvas – Documentary In this three-part documentary series, Phara de Aguirre investigates women who have turned to guns. It follows her journey to Israel, Palestine, Columbia and Iraqi Kurdistan.



THE LOOMING TOWER

The series is toplined by American actors Jeff Daniels ("Godless", "The Martian") and Peter Sarsgaard ("Wormwood", "The Magnificent Seven") and French actor Tahar Rahim ("A Prophet", "Panthers"). **Based on Lawrence Wright's Pulitzer Prize-winning non-fiction book, the series tells the back story of September 11.**

International Platform – Hulu – Series- "The Looming Tower" traces the rising threat of Osama Bin Laden and Al-Qaeda in the late 1990s and how the rivalry between the FBI and CIA during that time may have inadvertently set the path for the tragedy of 9/11.



DE WERELD VOLGENS 80-JARIGEN

De Wereld Volgens 80-Jarigen" is produced by Talpa, the company that produced "The Voice" and "Dating in the Dark". It follows the success of the reality "Around the World With 80-Year Olds" **where senior traveled the world to discover new countries and cultures.**

Netherlands – SBS6 – Reality - This reality follows eight seniors, who start living in a modern house full of modern products for a while, with four hipsters. The senior participants explain what they think of the modern world compared to the past.

Source: Eurodata TV Worldwide / NOTA / Relevants partners



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