

PRESS RELEASE

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One TV Year 2020

Viewers appetite for TV contents boosted creativity

In this very particular year, the TV industry has managed to launch a host of new programmes, among which a significant part of imports. These have appealed to large audiences, as restrictions due to the pandemic have led to an increased TV viewing time in most areas of the world. SVOD has also surged. Glance spotted the best launches in 32 countries, highlighting consistent trends: games, political, crime, and human dramas thrive.

Popular launches in 2020

Some key learnings may be taken from the best launches in 32 countries round the world. They confirm a growing appetite for certain types of content. Large audience original creations with local twists and common grounds are likely to inspire buyers at MIPTV. 14 of the launches exceeded 2019 audience levels, the others doing less.

Avril Blondelot, Head of Content Insight at Glance, analyses: « *2020 didn't alter TV viewers inclinations. Family drama, crime series and period dramas still strongly appeal to the public. Various family games successfully shifted from real life to the TV set. Finally, TV plays with both linear and digital codes to create hits.* »

Foreign acquisitions have helped overtake some of the production constraints imposed by the pandemic. New imports have peaked higher than in 2019. 18 out of the 30 most popular import launches almost doubled their audience compared to 2019 levels.

Taking a closer look at specific hits, in terms of crime dramas, foreign shows have reached top ratings, especially British series: for example, *A confession* in Finland and Norway, and ***Van der Valk*** in Australia.

Again, this year, ***The Masked Singer*** remains a major hit in the countries where it launched. It achieved the best launch in 3 countries and appeared 12 times among the 5 strongest format launches. It was the number 1 format launch in the UK.

Lego Masters is another thriving format, ranking among the Top 5 format launches in 6 countries.

The South Korean ***I Can See Your Voice*** also stands in format hits. Originally launched on Mnet in South Korea in 2015, it made its way through Asia. It launched in the rest of the world in 2020 and will debut in new countries in 2021, often in competition with the Masked Singer. In this show, celebrities must assess the voice of the candidate, simply guessing from his appearance. In the end, they sing a duet with the remaining candidate.

Viewers still strongly adhere to local productions, with successful examples in Europe.

The major launch of the year in Sweden was the detective ***Bäckström***, a local celebrity in Northern Europe thanks to its literary success.

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Other local shows recently focused on the political drama genre. The UK excels at offering world-class political drama such as **The Salisbury Poisonings** on BBC One, the most successful launch of the year in the UK. Nevertheless, new countries explore the genre in a more indirect way. For example, the best launch in Russia features *The Tatar exiles in the 1930s*, in an emotional period drama based on a popular novel.

Family dramas also inspire local shows. In Italy, the highest rated launch was **Live and let live**, the story of a widow trying to cope with her family life and reinvent herself after the loss of her husband. Mysteries will surface in an apparently normal family.

Human drama also ranked first in Ukraine. In Asia, it focused on work life as illustrated in the top-rated launches in China, South Korea, and Japan.

Increased TV viewership

These performances were achieved in a context when global TV viewership increased across 2020.

TV viewers in 91 countries around the globe spent an average of 2 hours 54 minutes per day watching TV, which is up 6 minutes on 2019. Even young adults' viewing time increased by 2 minutes, with an average of 1 hour 49 minutes a day.

Daily viewing time is above the global average in most areas of the world: North and South America, Europe, Middle East, and Africa. Only Asia and Oceania have lower viewing time than the global average.

Daily Viewing time is growing in most areas except in North America (- 8 minutes) – where it stands at a high level - and Oceania (-8 min). Europe (+15 min) and Latin America (+10 min) now are the biggest TV markets. Daily viewing time increased by 4 minutes in Asia.

Frédéric Vaulpré, Glance Vice-President, said: « *Viewers have been keen to watch TV live in 2020, notably following news and country leaders addresses. In most countries, the levels of daily viewing time have remained high even after restrictions linked to the pandemic were eased, especially among young adults.* »

Non-linear viewing stayed stable: 17 minutes per day per person. Disparities exist between regions: 26 minutes in North America, 13 minutes in Europe and Asia, 12 minutes in Oceania. Non-linear viewing has nevertheless increased for certain shows, especially in the UK. For example, non-linear viewing accounted for 41% of the audience of *I am a celebrity – get me out of here* on ITV. 72% of the audience of *Life on BBC One* was non-linear (catch-up and pre-broadcast).

2020 saw a steep progression of SVOD. Well settled in the US, it catches up in France with almost twice as much time spent every day in 2020 vs 2019. In Norway, there has been a 49% growth of the daily time dedicated to SVoD. Most watched shows on Netflix in the 4th quarter of 2020 are: **The Crown** in France and **The Queens' Gambit** in the UK, Spain, Germany, Italy. **Emily in Paris** has been an international hit, although noticeably not in France.

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2021 prospects

The first quarter of the year hints at shows that are going to be the year's hits. Figures speak for themselves: 40% of the best-rating shows in 32 countries were launched during the first term of 2020.

In January and February 2021, 8 of them have particularly stood out, be it for their creativity, nostalgia, or relevance.

The German ground-breaking and thought-provoking mini-series **Ferdinand von Schirach: feinde** offers two versions of the same story, the kidnapping of a 12-year-old girl. The first one from the investigating police officer; the second from the defence lawyer. Both versions were broadcast simultaneously on two different channels and worked well in Germany and Austria.

In France, **La Promesse** on TF1 has been the best launch so far, another crime series involving kids. Twenty years after the unsolved disappearance of an 11-year-old girl, the initial investigator's daughter tries to unravel the case.

In the UK, the ITV true-crime series **The Pembrokeshire Murders** gripped the British audience, confirming the European viewers appetite for cold cases.

In Israel now, **Line in the Sand** is Keshet 12's new crime drama and has recorded highest ratings in 2021 so far. It relies on the classic trope of the police detective returning to his hometown to discover that the local police have been crippled by a local criminal gang.

In Finland, the best launch is **SISÄILMAA**, a particularly relevant black comedy in the current context. It portrays a middle-aged woman striving to be a good leader in a job centre. She has peculiar ways to try and meet impossible requests. The office is haunted, and each of her missteps leads to the worst.

In Norway, environment is the focus of the magazine **SLØSESJOKKET**, best launch in the country. It calls on celebrities to raise awareness about social and environmental responsibility. The host and his guest look for solutions to fix objects and reduce waste.

Surfing on the audience appetite for game shows, the Dutch SBS6 channel has successfully launched **Marble Mania**. Playing with nostalgia, it stages celebrities competing on elaborate marble tracks.

In China, the reality competition **HOT SONGS VS NEW SONGS** addresses the Tik Tok community in a meeting between the digital world and TV. Emotional, entertaining, and spectacular, the show stands as the best 2021 launch on young adults.

Avril Blondelot said: *"After such a year, there is a desire for lighter subjects, which is currently finding an interesting outlet in family versions of children's games on prime-time television. It is uncommon to find comedies among the strongest launches, however we observe growing demand for comedy drama."*

Frédéric Vaulpré concludes: *"After an extraordinary 2020 year in terms of TV consumption, 2021 will confirm if the changes occurred were mainly the results of exceptional circumstances or have created new ways to watch and interact with specific TV & video content. In this perspective, the audience ratings of entertainment shows, with strong joint viewing habits in 2020 or good performances on young adults, will be scrutinised. Additionally, the return of live popular sports events like the Euro 2021 in June will surely reach new audience records as the appetite for great sports competitions has not declined in the last months."*

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About Glance

Part of Médiamétrie, Glance is the specialist of international TV markets and leading provider of official TV ratings for over 7000 channels in more than 120 territories and insight analyses based on a global expertise. Glance tracks the latest TV and online contents and trends in nearly 50 territories. With more than 230 flagship clients, Glance is market leader in TV and video market intelligence.

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About Médiamétrie

The French industry leader in media research, Médiamétrie monitors, measures and analyses audience behaviour and market trends, and fosters the emergence of a benchmark for media data in France. Created in 1985, Médiamétrie is expanding its activities in Television, Radio, the Internet (computer, smartphone and tablet), Cinema and the Cross-media sector in France and abroad.

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