

growth of reality tv genre in pan-arabian television

reality genre

'Reality TV' refers to unscripted talent and game shows, casting primarily amateurs with viewer participation by means of voting contestants. Reality TV has been described as infotainment genre about real people that cross the divide between documentary and drama. Globally two European companies, Endemol in Holland and Fremantle Media in Britain dominate the genre in selling production, creative, technical and dramatic components worldwide which are then culturally adapted for local viewership. Of the licensed shows currently being aired in the Pan-Arab region two third of the programming content is licensed by these two companies alone.

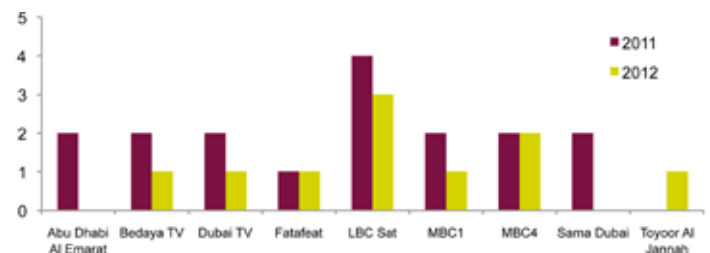
introduction in the Arab World

MBC pioneered in putting its faith in the economics of reality formats in 1998-99 by commissioning UK company Action Times to produce series of Arabic version of shows like Spellbound, Wipeout and Hilarious Hits in a bid to maximize their Ramadan ratings. Its subsequent success in securing exclusive Arabic rights to 'Who wants to be Millionaire' from the UK company Celador in 2000 is widely regarded as a turning point in popularizing the reality genre across the Arab satellite market.

Future TV followed the act by accessing rights to Fremantle Media's 'Pop idol' concept. Within the reality genre in Arabian broadcast industry 'Super Star' the regional adaptation of the show created a benchmark of commercial success targeting the most coveted youth segment by advertisers. The show attracted 4.8 million votes in its inception in 2003 by following year this figure more than doubled to around 10 million and by 2005 it reached to 15 million plus mark. MBC acquired the license to air the show in 2008 retitling it as 'Arab Idol' and going on air in December of 2011 on MBC 1.

So well received is the genre by regional broadcasters that some networks have dedicated entire channels to individual reality shows such as Nagham which broadcasts events taking place in LBC's 'Star Academy' show licensed by Endemol running in its ninth season this year.

exhibit 1: number of Arabic reality TV 2011-12



Note: Reality TV shows that started to air in late 2011 and continued airing in 2012 are calculated once as 2011 shows.

Sources-Arab Advisors Group 2012; Internal Analysis

business model

Because adapting a format is less risky than creating a brand new program, risk-averse Arab producers started relying heavily on them. "The reason why (reality) formats travel well around the world is because you already have a wealth of experience when you bring the format to a region" says Ziad Kebbi of Sony Pictures Arabia.

Besides reducing risk, reality TV formats offers opportunities of cost-cutting by substituting real people for expensive stars inasmuch revenue stream being not restricted to advertising alone. Audience engagement vital in proceeding the narratives of these shows is equally determinant in commercial success. Reality TV has allowed regional broadcasters to exploit the synergies of converging media & telecom industries as well as spin off from merchandising. Nominating or voting for contestants using text messaging, IVR, chatting on TV or calling a live music or game show are now established revenue streams for the local broadcasters.

Because most of these shows features singing competitions they operate as a pipeline of new talent for the Arab recording industries, spawning synergies that include CDs, music videos, ringtones and concert tours managed by conglomerates like Rotana. Star Academy spawned two sitcoms in 2007 and 2008 with amateur contestants recycled as professional actors capitalizing on their newly acquired fame.

Reliance on interactive practices gives media entities a wealth of demographic information about their audiences in a market where there is a lot of agony about unattainability of credible TV ratings. Voting figures for shows like Super Star and Star Academy offered advertisers tangible proof that the millions of people watching have enough disposable income to spend on calls and messages at premium rates. For these reasons Arab channels were ready to engage in competitive bidding for formats which had effect of pushing license fee up to the point where they ranged from \$5,000 to \$70,000 per episode.

criticism and censorship

Given the format selection is based on experimentation in non-Arab markets, some culturally discounted imports have met with critical failure on grounds of non-adherence to the regional cultural and morality codes. Though close gender interaction on stage and in shared living quarters attracted record desired youth audiences, it also triggered the ire of clerical and social leaders over gender roles and creative decadence on screen. MBC's investment in 'Big Brother' format owned by Dutch company Endemol was a total loss and PR disaster for the network to this effect. Aired on MBC2 from 20 February to 2nd March 2004 the Arabic version Al-Rais (The President) was brought to a close abruptly in a firestorm of controversy.

In a similar vein a religious body in KSA issued a Fatwa i.e. religious ruling, prohibiting watching or participating in LBC's Star Academy program albeit the assurance of broadcasters on program's conformity to local customs. This resulted in local telecom providers blocking SMS to the show in order to protect their brand hence closure of a major revenue stream of MVAS for the channel. The particular show was also pulled out from Algerian TV screens by the public broadcaster following complaints that the show was inappropriate and un-Islamic.

customization and adaptation

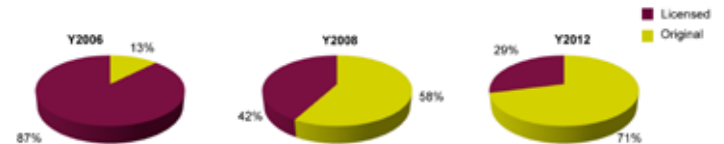
MBC's experience with Al Rais led the channel to search for socially acceptable reality TV formats. Regional broadcasters quickly realized that compliance to local sensibilities was critical to the success of the genre. Formats premised on outward combative and selfish behavior such as 'Survivor Arabia' enjoyed very modest ratings as opposed to programs that focused on individual ambition and social norm. Hence MBC's version of the Biggest Looser dubbed as 'Rabeh al Akbar' (The Biggest Winner) in its Arabisation avoided humiliating rituals of the cast familiar to western audiences.

The early success of foreign licensed formats and resultant beeline by regional broadcasters for their acquisition evoked strong apprehensions in local production houses complaining that local networks were willing to pay 'millions' to overseas offerings but 'peanuts' to local creativity preferring content acquisition over content creation. These initial fears

soon proved unfounded as the market swayed towards the preference for local produce in light of their phenomenal success with the masses.

Where in 2004 most Arabic reality shows were licensed formats by US or European companies by 2012 a majority (13 out of 17) are original home productions. With just over a quarter of windowed content in on-air reality genre currently broadcasters have realized that local production are not only cost savvy but also preferred by regional audience.

exhibit 2: licensed formats versus original Arabic reality shows



Note: The projections are based on sample of reality TV shows on selected channels examined in Arab Advisors Group reports.

Sources-Arab Advisors Group 2006-12; Internal Analysis

promoting local culture

Reality genre is also proving as a platform to promote local and cultural themes on TV screens inundated with foreign ideas. Abu Dhabi TV has successfully used the format to explore aspects of the local culture that are not part of day to day television such as local Najdi poetry. Abu Dhabi's 'Shae'r Almayoun' similar in format to American Idol sees thousands of eager entrants competing for the title with a winning prize of AED 5,000,000. The program has been so successful since its inception in 2006 that it has not only been accompanied by a magazine and a specialized website in its name but also a dedicated TV channel which airs re-runs of old episodes. The pan-Arab reality show Nujum Al Ulum' (Stars of Science) produced by Qatar Foundation and billed in local press as Star Academy of scientists is another example of uncontroversial appropriation of the reality genre in local markets. Under patronage of Qatari royal family the concept aims to promote education and interest in science and technology in the Arab region with a winning prize of USD 300,000 attracting millions of viewers and has been a subject of Google doodle.