trends in Arabic drama series (Musalsalat) production paradigm shift

twofour54 Abu Dhabi

media & entertainment hub

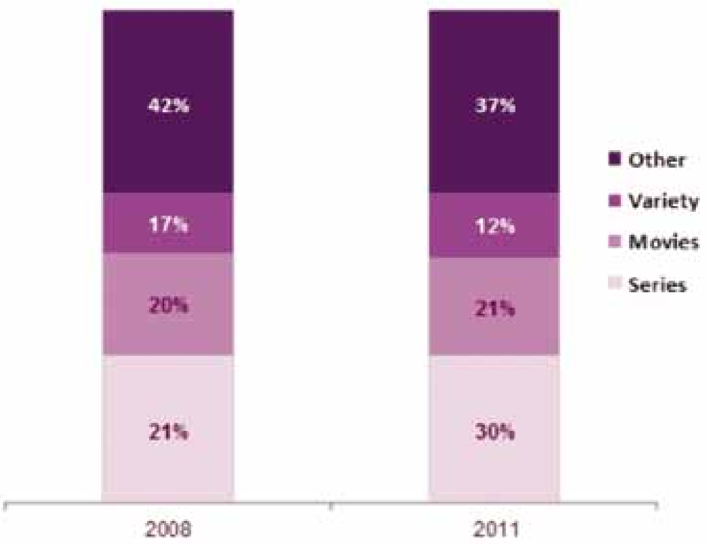
In an overwhelmingly import oriented content bazaar of Arabian TV industry, Musalsalat stand unique in their indigenousness and mass popularity, being rivalled only by movies and football. The Arabic term 'Musalsalat' stands for drama series with episodes of 30-45 minutes duration. The format is close to that of a Latin American Telenovela concept-clear cut stories with definitive endings that permit narrative closures.

Traditionally Musalsalat were either situational comedies or religiously inspired. Present-day productions have started to address historical, creative and socially progressive issues, targeting the young and well-travelled audiences.

Though these soaps get prime ratings throughout the year, it is during Ramadan, that they become a raving success in securing viewership. That Musalsalat have become paramount Ramadan programming is evident by their dominance on the grid and attracting heavy ad-spend. The number of Musalsalats produced specifically for Ramadan reached over 100 last year with Ramadan TV advertising amounting to USD1, 947bn constituting 21% of the total regional TV adspend of USD 9,189bn.

exhibit 1

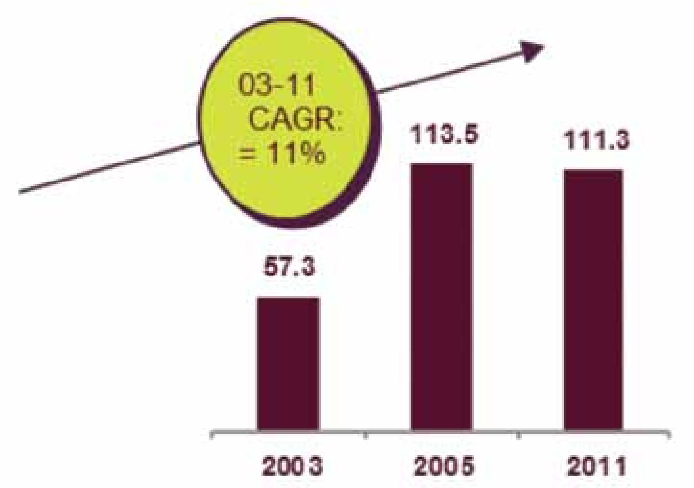
breakdown of 2008-11 Pan – Arab tv ad spend (% of total)



Sources: PARC; Ipsos

exhibit 2

total Arabic series broadcasted hours Pan Arab (In '000 hours) (2005-11)



Sources: PARC; Ipsos

Pan Arabian themes

Given the vast footprint reach of satellite television, broadcasters are keen to invest in Musalsalat themes that appeal to wider Pan Arabian audiences. This is all the more true given the tight timeframe of Ramadan's schedule (30 days) - producers cannot afford to accrue audiences overtime, so the chosen theme must invoke viewers' interest at the outset.

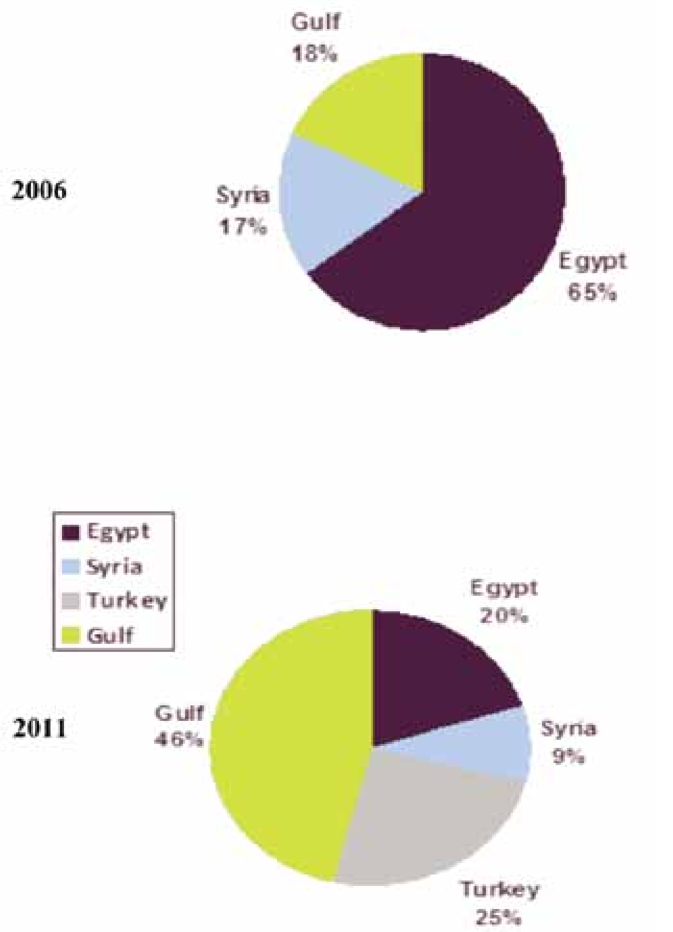
The above trend has given rise to big-budget production in recent years with mammoth investments in cinematography, set design, costumes and special effects with an average budget of US$2 million. These productions centre on epics set in bygone days of the Islamic empire and biographies exploring the lives of famous Arab singers and politicians. These have included the chronicles of famous singers like Andalib, dramatization of the life of Salah Eldine el Ayoub; 11th century Persian poet Omar Khayyam and subjects of broad pan Arab significance like the extremism in the al Tarek al Kabul (Road to Kabul) or Palestinian conflict in Al Taghriba Filistiniya (the Palestinian Estrangement).

regional competition

The Musalsalat genre, which was earlier the sole property of the Egyptian production industry, is today sharing the stage with Syrian and Gulf producers. Since the liberalization of the Syrian media production sector in the 1990s, a generation of Soviet trained film and theatre directors has reenergized Syrian Musalsalat with bold themes and innovative techniques particularly in the popular epic and historical serials.

exhibit 3

the supply of Arabic tv series in 2006-11 (% of total)



Sources: Booz Allen Hamilton; Ipsos

The viability of most Syrian productions relies to a large extent on both investments and audiences from the Gulf. The Syrian industry's rise was partly because was much cheaper to make TV in Syria - averaging one million dollars per series, a third of the price in Egypt. The Syrians were more commercially agile than their Egyptian counterparts, where much television output is still in the hands of lumbering state broadcasters.

Of late new entrant Turkey is fast-encroaching Egyptian and Syrian stronghold in the form of dubbed Turkish content. Here again the business reality of imported content being cost-effective than local produce along with audience appreciation has helped advance the Turkish influence. Fadi Ismail, the General Manager of O3 Productions, an MBC Group subsidiary says "Turkish series are not only less expensive but also more lucrative than Arab productions".

The Gulf has also seen a renaissance in local production with Kuwait and Saudi Arabia producing more drama and comedy in recent years.

Arab Spring's implications

Despite the violence and political uncertainty sweeping the two production magnates of Egypt and Syria, Musalsalat output for Ramadan 2011 remained mainly unaffected to a large extent. Given that most dramas take at least a year to make, the majority of Ramadan series were ready to be aired long before the popular uprisings started. Nonetheless there was a significant plunge – particularly in Egypt, where the numbers dropped from 50 series produced in 2010, to 32 in 2011. In Syria 28 new productions were ready, marginally down from the 32 produced in 2010. Productions pipelines for Ramadan 2012 are much thinner due to their interruption by the unrest during their production.

There were also reports of a depleted Musalsalat take-up by GCC broadcasters given their apprehension that most viewers would prefer current affair programming over drama in the prevailing unrest. Some producers groused that in the changed landscape satellite channels were tendering a meagre 10% price of their pre-Arab spring offering.

Gulf drama producers advantageously filled the supply gap created by the Egyptian and Syrian absence, producing a number of series that secured the coveted slots on the programme grid of Arab satellite channels, a scenario likely to re-emerge incoming Ramadan (See Exhibit 3).

Coupled with their economic prowess, Musalsalat also carry heavy socio-political weight evident during the Egyptian and Syrian unrest, where there were viral campaigns by both pro- and anti-regime activists to boycott certain soaps because of the political views of their cast and directors.

conclusion

The uncertainties engulfing the Pan Arab media today are quite an oddity with the past. The shifting political reigns in the traditional stronghold markets of Musalsalat production presents a myriad challenges and opportunities for both broadcasters and producers. While the political unpredictability makes forecasts difficult, some emerging trends for the near future are as follows:-

- One man's loss is another man's gain. Gulf drama producers are expected to make headway capitalising on the instability of the two most prominent markets; this was distinctive in 2011 and is expected to be even more prevalent in the current year.
- Turkish influence. Dubbed drama from Turkey has been very well received by Arab audience, with Noor being the case in point, consequentially broadcasters are closely following the Turkish market. The pie share of Turkish import is likely to swell in the coming years.