



# TRACKING THE GIANTS

The Top 100 Travelling Unscripted Formats

2020-2021

April 2021

K7.Media

# Tracking the Giants:

## The Top 100 Travelling Unscripted TV Formats 2020-2021

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# Introduction

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Welcome to the 2020–2021 edition of **Tracking the Giants: The Top 100 Travelling TV Formats**

It would be fair to say that 2020 was a year unlike any other in living memory. With most of the world shut down by the COVID-19 pandemic, the TV industry was unable to gather for its traditional events but also benefited from audiences who were compelled to stay at home, hungry for distraction from the real world. This may explain why the format market has remained resilient in the face of extraordinary problems, with sales and production options remaining steady.

The disruption, however, has meant that some distributors have not been able to supply finalised sales for the year. Banijay's acquisition of Endemol Shine Group (ESG) and NENT Studios UK seeking a buyer have also meant that sales information from those companies has yet to be signed off and released. As such, we are attaching a caveat to this year's data, which is not as complete as previous years, and our insights and predictions take this into account. To compensate, we have explored the available data more deeply than ever before, separating confirmed broadcaster sales from production options, to offer a more nuanced view on what has been sold in the past and what producers are betting on for the years to come.

In addition, for the first time, we have introduced a special insight into Asia. Much of the most interesting activity in the unscripted format market right now is coming from this region. South Korea has established itself as a market heavyweight and Vietnam is emerging as one of the most prolific importers of formats, the most active buyer in the region for the third year running. See page 25 for this new analysis.

We also note that from our direct conversations with companies around the world, many have taken the last year of halted or delayed production to refocus on developing new formats. If our anecdotal data is true across the industry, it seems likely that the 2021 and 2022 markets will see an exciting number of fresh launches that could shake things up in ways we've not seen since the format boom of the early 2000s. If anything, the market may emerge from this difficult year stronger than ever and if that is true, even more interesting times lie ahead.

**Keri Lewis Brown**  
Founder and CEO, K7 Media

## Format Stars of 2020

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### TERRITORY OF THE YEAR - **South Korea**

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South Korea places fourth when sales and options are counted, and in terms of sales alone actually ranks in third spot, on a par with the US when looking at the 2020 data alone, which makes its promotion to a format sales heavyweight all but assured.

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### SPIN-OFF OF THE YEAR - ***Beat the Chasers***

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***Beat the Chasers***, from ITV Studios, is worthy of note where sales over the last year are concerned. It is outperforming its parent show with four new sales compared to none for ***The Chase*** in its original form.

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### DISTRIBUTOR OF THE YEAR - **Fremantle**

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If you want an illustration of how the format market has weathered this unusual year, look no further than Fremantle, which dominated our 2020 data no matter how it was arranged and so retains the Distributor of the Year title from 2019.

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### RISING MARKET OF THE YEAR - **Vietnam**

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For the third consecutive year, Vietnam is the Asian country that has bought the most formats. This consistency over time means we're now confident in saying that this is no mere blip in the data but a signal that Vietnam is positioned to become a major player in format sales for the territory. We strongly recommend anyone looking for a growth market, particularly for game shows, should be paying close attention to Vietnam from now on.

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## PUBLIC SERVICE FORMAT OF THE YEAR - *The Write-Offs* PAGE 17

Banjay's *The Write-Offs* tackles the subject of adult literacy and follows eight participants aged 22 to 65, as they learn to read and write for the first time. The show not only received strong ratings and critical acclaim, it is also proving to be a potential format winner too. The format has been picked up in Denmark and Australia, and we understand several more sales are confirmed but as yet unannounced.

An honourable mention is awarded to ABC Australia's Rose D'Or winning *You Can't Ask That*,

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## FORMAT TO WATCH - *Tough as Nails* PAGE 19

Although this new format from ViacomCBS Global Distribution has yet to make any sales, it has been optioned over 20 times making it one of the most popular new formats among production companies. A competitive reality show, it auditions manual and frontline workers from famously demanding jobs such as construction, fishing, agriculture and emergency services and pits them against each other in job-themed challenges to see which worker is truly "tough as nails".

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## 2020 GENRE TRENDS PAGE 21

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## 2021 GENRE TO WATCH: Games to TV PAGE 22



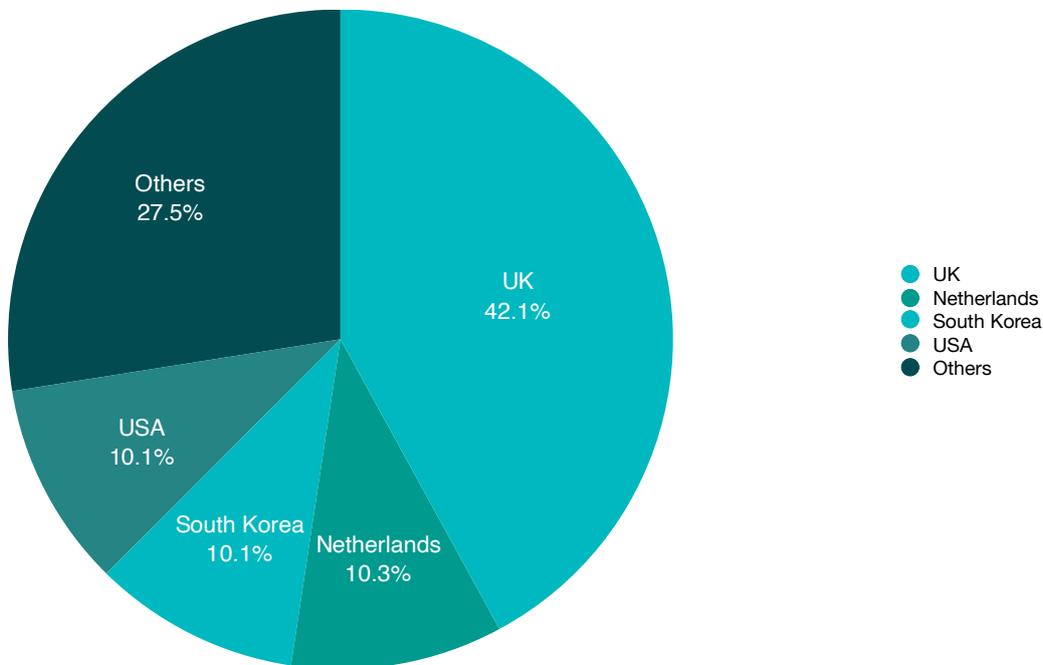
## Territory of the Year: **South Korea**

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This won't come as a surprise to anybody who has been paying attention to social media. ***The Masked Singer***, our Format of the Year from 2019, has gone from strength to strength and is now easily one of the top performing shows on the market, whether judged by ratings or sales. With its combination of high production value performance, strong visual identity and quirky guessing game, ***The Masked Singer*** is a perfect fit for today's audiences who want the sizzle of a well-produced music show and the opportunity to join in live debate during the broadcast, on the sofa or on social media. It is, as all the biggest hits often are, the right show in the right place at the right time.

South Korea is hardly a newcomer to the format market, of course. Shows like ***I Can See Your Voice*** and ***Grandpas Over Flowers*** have both been global success stories in the last few years, and have continued to sell well in this year's data. In terms of countries with the most format sales and options, the top three spots are still filled by the UK, the US and the Netherlands - a state of affairs that is unlikely to be challenged any time soon, thanks to the number of older but evergreen formats from those territories. South Korea places fourth when sales and options are counted, and in terms of sales alone Korea actually ranks in third spot, on a par with the US when looking at the 2020 data alone, which makes its promotion to a format sales heavyweight all but assured.

CHART: SALES VOLUME 2020 BY COUNTRY OF ORIGIN



The question, of course, is whether this will be a permanent place for South Korea in the Top 10 format producing countries, or a blip caused by a single breakout smash hit. The history of format sales is littered with countries that scored one surprise format hit but then struggled to capitalise on its success in subsequent years, and slipped back down the table. The success stories in 2020 feel more like the global market gradually warming to South Korea's uniquely fresh approach to entertainment shows, rather than simply one format catching on.

Several factors lead us to suspect that South Korea is better placed than most to hold its spot. One, as mentioned earlier, is that the country has produced popular formats before, just as quirky and memorable, even if they never hit as big as quickly as *The Masked Singer*. 2015 launch *I Can See Your Voice* is worth considering here. Another twist on what we'll call the "mystery talent" genre, a panel of celebrity judges must guess which contestants will be good or bad at singing without actually hearing them. The format has been steadily gaining sales, with seven major new adaptations airing in 2020 - including a US network debut in September with a UK version debuting to good ratings in the BBC's prime Saturday night slot on 10 April 2021. As with *The Masked Singer*, *I Can See Your Voice* takes an established formula and gives it a playful guessing game twist that demands engagement from viewers at home.

Also key here is that South Korea has been forging long-term links with western media giants, with format development partnerships with ITV Studios and Viacom International Studios two of the

most recent announcements. This is a country that has been building up to this success story for a long time, and pushing its best production companies to the front of global conversations. All of which would not be possible without another vital ingredient in South Korea's success: it has a cohesive and proactive industry body in Korea Creative Content Agency (KOCCA) which has painstakingly worked to get to this point. It is hard to understate how important KOCCA has been in this journey, building and strengthening global connections, supporting and promoting the domestic industry and putting all the foundations in place for a robust, sustainable Korean format export market. If you want the magic ingredient that turns a regional hit into an industry-wide global player, the role of bodies like KOCCA is it. For this, and the other reasons listed above, we see Korea remaining a key format producer for the long-term.



## Spin-off of the Year: **Beat the Chasers**

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Spin-off formats continue to perform well, offering viewers a new take on familiar ideas, and offering producers and broadcasters the chance to develop new shows with the safety net of a proven brand.

***Beat the Chasers***, from ITV Studios, is particularly worthy of note where sales over the last year are concerned. It is outperforming its parent show with four new sales compared to none for ***The Chase*** in its original form. That much is to be expected where legacy brands are concerned, of course, and actually suggests a best case scenario. Given that ***Beat the Chasers*** makes no sense in territories that do not have a local version of ***The Chase*** to provide its cast, having the spin-off eventually overtake the original in format sales implies a robust chain of demand.

Attention should also be directed to the recent announcement that ITV has ordered a brand-funded version of ***The Chase***, supported by Gala Bingo, exclusively for its ITV Hub digital platform. As explained in K7 Media's recent **Brand Funded Programming** report, we expect to see this model being used more and more, and the fact that ***The Chase*** is an early offering for the UK, a territory that has been more resistant than most to overtly branded shows, is another sign that this format family will only grow and grow.

It should be noted that some distributors have not supplied sales data for the last year, which means that several key franchise series - including *Big Brother*, *MasterChef* and *First Dates* - are not available for comparison. Also absent from the figures is *The Masked Dancer*, the somewhat inevitable brand extension of *The Masked Singer*. We know this has sold well from trade announcements but it remains to be seen if the mania for “masked” talent shows is sustainable, or can support multiple variations on the theme.

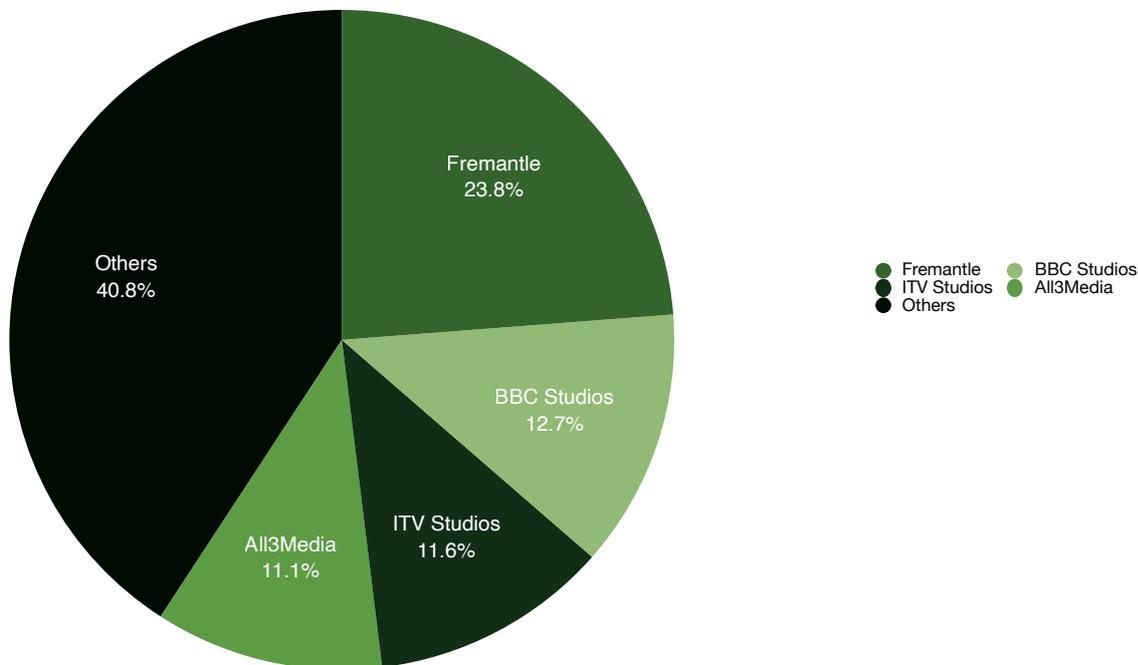
Therefore, we feel that on the available data *Beat the Chasers*' simple quiz format gives it more longevity than some of the other top performing spin-off formats and that while there is definitely a top level trend for glossy twist-driven performance shows such as *The Masked Singer*, we feel there is more long term stability and steady growth in such established, easily-staged formats.



## Distributor of the Year: Fremantle

If you want a convenient illustration of how the format market has weathered this unusual year, look no further than Fremantle, which dominated our 2020 data no matter how it was arranged.

CHART: SALES VOLUME OF 2020 BY DISTRIBUTOR



First and foremost, four of the top 10 selling formats in 2020 come from Fremantle, including the two co-distributed formats *Masked Singer* and *I Can See Your Voice*, with 23 and 7 sales respectively. Fremantle also has *Game of Talents* (5 sales) in the top rankings of our data, as well as *My Mom Cook Better Than Yours* (4 sales). In percentage terms, Fremantle also comes out on top with 34% of the titles in the Top 15 formats of the year coming from its catalogue and with 92 completed format deals for the year, Fremantle also outperforms its peers in terms of sheer sales volume (see pie chart SALES VOLUME OF 2020 BY DISTRIBUTOR above).

## Rising Market of the Year: **Vietnam**

For the third consecutive year, Vietnam is the Asian country that has bought the most formats. This consistency over time means we're now confident in saying that this is no mere blip in the data but a signal that Vietnam is positioned to become a major player in format sales for the territory.



Vietnamese adaptation of CBS' **Hollywood Squares**, produced by Dong Tay Promotion

There are several reasons why Vietnam has become so prominent. Vietnam has been very open to great ideas from all parts of the world. Game shows and quiz formats are especially welcomed, as they are affordable to produce and easy to adapt to local tastes.

This is very much an emerging territory with an internal entertainment industry that is still evolving and growing. Vietnamese audiences have a strong appetite for light entertainment which applies across multiple genres. Game shows, dating, reality and talk shows are all in high demand from viewers who still tend to watch linear broadcasts in a communal setting. Vietnamese audiences are fickle, however, which has led to a surge in demand for more formats to draw eyeballs away from currently airing shows. These formats can be brand new or venerable legacy formats elsewhere in the world. To Vietnamese viewers, they are all fresh and exciting.

Another key factor to consider is that Vietnam is a territory where brand-funded programming is a key part of the production ecosystem. Available budgets from state-owned broadcast networks are not high, which means that international formats with proven success are an easier sell to the corporate partners who will provide funding.

It is also worth noting that the Vietnamese government leases some network channels to private companies, such as DatViet VAC which operates VieChannel. DatViet also runs Dong Tay Promotion, a prolific producer of game shows in particular, both for its own channels and other broadcasters. The rise of companies like Dong Tay, with a need for lots of material, has contributed considerably to Vietnam's appetite for global acquisitions.

This is hardly an overnight shift, but when we look at the historical data we can see that Vietnam's growth as a market is established and expanding. If we rank the top format purchasing countries based on available data, it places 20th worldwide. However, there are format acquisitions that are known but not available via distributor data and when these are included Vietnam can claim 25 format purchases in the last year, which would rank it alongside the likes of Belgium and Sweden in terms of sales. We strongly recommend anyone looking for a growth market, particularly for game shows, should be paying close attention to Vietnam from now on.



## Public Service Format of the Year: *The Write-Offs*

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The rise of SVOD and the trend away from linear broadcast schedules has meant that some predicted the gradual end of the public service broadcasters (PSBs) in the last few years. While it's true that PSBs are still in decline where traditional viewing is concerned, 2020 also saw a perfect illustration of why they are a useful and vital part of the TV landscape. The BBC's output of educational programming, for example, was a boon to UK children unable to attend school in person. Similarly, formats which tap into current concerns or offer intimate perspectives on social issues have out-performed expectations.

Standing out particularly in this field is Banijay's *The Write-Offs*, which debuted on Channel 4 in the UK in September 2020. Hosted by Sandi Toksvig, the limited series tackled the subject of adult literacy and followed eight participants aged from 22 to 65, as they learned to read and write for the first time.

The show not only received strong ratings and critical acclaim, it is also proving to be a potential format winner too. The format has been picked up in Denmark and Australia, and we understand several more sales are confirmed but as yet unannounced. More sales are expected to be closed during 2021. No doubt audiences were primed to feel more compassionate

towards their fellow humans because of world events, and the subject is socially important, often overlooked and - crucially - lacking in controversy. At a time of deepening political divides, there are few on either side who would criticise the need for adults to overcome stigma and gain these skills.

Some PSB formats have made a virtue out of controversy, however, and we want to give an honourable mention to the Rose D'Or winning *You Can't Ask That*, originating on ABC in Australia in 2016 and now prepping its sixth season for domestic viewers. The show's concept is to openly address social, political and cultural issues that are seen as problematic by posing uncomfortable questions to participants from specific social groups. Episodes have covered everything from transgender people to autism, priesthood and more.

It's a typically Australian response, to simply talk our differences through without embarrassment, but one that clearly resonates afresh as "culture wars" proliferate across the media around the world. With 11 new international options in 2020, 47 overall sales, and awards from the United Nations for its work on promoting visibility for the disabled, it seems this is a format that was made for these times.





## Format to Watch: *Tough as Nails*

Although this new format from ViacomCBS Global Distribution has yet to make any sales, it has been optioned over 20 times making it one of the most popular new formats among production companies. A competitive reality show, it auditions manual and frontline workers from famously demanding jobs such as construction, fishing, agriculture and emergency services and pits them against each other in job-themed challenges to see which worker is truly “tough as nails”.

Although the casting on the show is purposefully diverse, this is clearly a format that was developed when the prospect of a second Trump term was a possibility. Our feeling is that the veneration of physical labour, and a residual interest in frontline emergency workers, will continue to be a cultural force for a while yet regardless of which political party holds the reins in Washington. Public appetite for shows about being active and productive will likely also still resonate with post-pandemic audiences yearning for anything that celebrates life beyond Zoom calls.

Taken along with the volume of options for *The Farm* from NENT Studios UK it definitely suggests producers are sensing an appetite for shows which offer a “back to basics” approach to life, with practical skills and old-fashioned toil looking attractive to viewers who have been locked down for over a year.

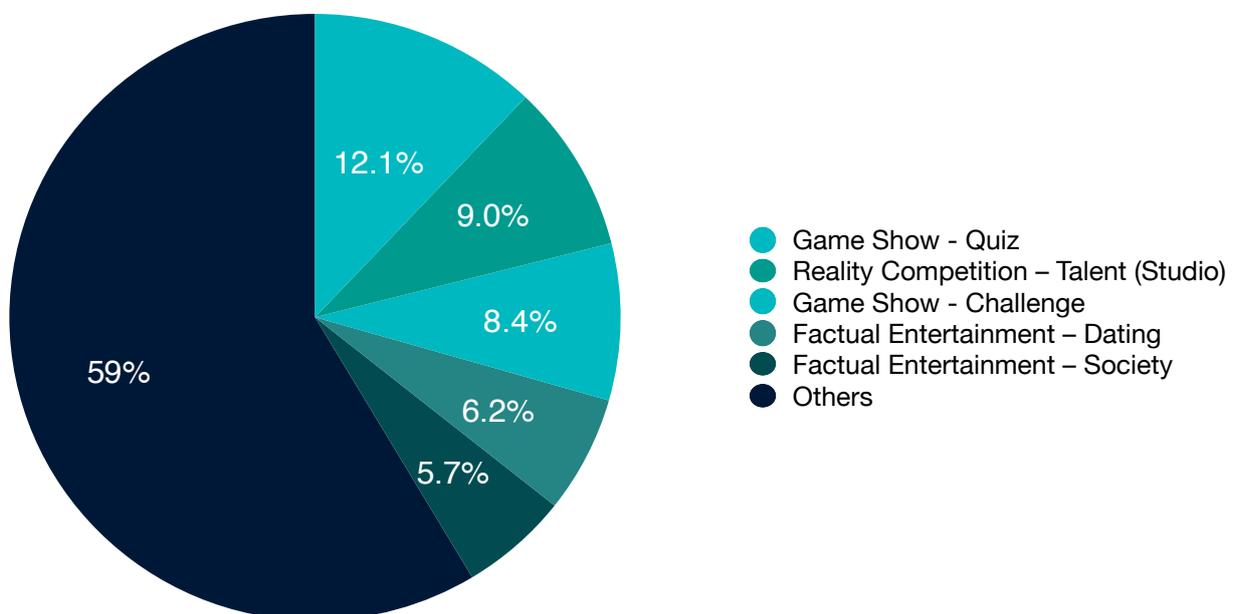
The key question is whether the USA's fixation on blue collar authenticity will travel, and if ***Tough as Nails*** will land commissions in territories with different social and cultural priorities. There is also the danger that audience tastes will return to "normal" sooner than expected, and lose interest in such rugged topics once this peculiar moment in history has passed.

***Tough as Nails*** is certainly a show very much in tune with a specific time and place, and we will be watching to see how many of those aspirational options turn into broadcaster sales over the next year.

## 2020 Genre Trends

The top performing genres of 2020 are not unexpected. Quiz shows dominate, with 97 sales and options across multiple titles, with talent shows (70 sales and options), challenge-based game shows (56 sales and options) and factual entertainment dating shows (49 sales and options) following close behind.

### CHART: TOP PERFORMING GENRES OF 2020



It's the fifth best performing genre that is worth exploring in more detail. Factual Entertainment Society ranks fifth for the year, a genre which feels very much in turn with the times. These are shows that are, as the category suggests, about communities, cooperation and shared nostalgia. They are almost always uplifting in tone, and foreground "feelgood" stories. Given the global situation in 2020, it's easy to see where this demand is coming from. Successful formats that lead with a tone of social connection and harmony include Fremantle's *The Great Give Back*, in which a well-off family works with a less fortunate family from their local area to improve their lives.

What is most interesting about the strong placement of this nascent genre is that whereas quiz shows, talent shows, challenges and fact-ent dating are all fairly evenly split between sales and options, Factual Entertainment Society places in the Top 5 on the strength of options alone - with three direct sales but 43 options taken out. Time will tell how many of those options reach production and broadcast, but the swell of interest in this sort of material from production companies and distributors is definitely worth watching in the short term.

## 2021 Genre to Watch: **Games to TV**

One recurring trend we have seen across all genres is an appetite for the familiar, the reassuring, the nostalgic. This was something that was already bubbling under in previous years, but became far more prevalent in 2020 as the need for “comfort food” became more pressing. It’s surely no coincidence that we’re seeing a raft of formats which take traditional childhood toys and games and turn them into marketable TV.



Marble Mania

John De Mol’s **Marble Mania**, sold by Talpa, launched earlier this year and sees the iconic format creator returning to territory previously mined in 1998 show **Domino Day**. De Mol has admitted that **Marble Mania** came about because he saw that marble maze videos, in which people roll the glass balls down complex pathways and rigging, shot up in popularity on YouTube during lockdown. Similarly, Netflix show **Floor is Lava** tapped into a childhood pastime that is universal in its appeal.

This is not a trend limited to English-speaking territories. Mexico has **Game of the Goose** (El Juego de la Oca) based on a popular local board game, while TV Asahi’s **Red Light, Green Light** is based on a globally recognised children’s party game variously known as

Grandmother's Footsteps or What Time Is It, Mr Wolf?. Banijay has **Catch!**, based on perhaps the simplest and most primal schoolyard game of all.

This is also a genre ripe for branding and brand-supported funding. Banijay's **Lego Masters** applies the **Bake Off** competitive formula to the legendary plastic building bricks and has won over even cynical commentators with its inclusive and upbeat approach. Distributor eOne was purchased by toy company Hasbro, with a prestige TV drama based on strategy board game Risk among its new projects.



Lego Masters

Toy giant Mattel is making the biggest moves in the entertainment field, expanding its dedicated television division from producing IP-based shows such as Barbie and He-Man to also develop primetime game shows and even scripted dramas and movies based on its top brands. With ruthless family card game Uno celebrating its 50th anniversary in 2021, a TV game show version is in active development, while penny arcade classic Whac-A-Mole is also on the way. Propagate Content is partnering with Mattel on some of these formats, having paved the way with **Ultimate Tag** which debuted on Fox in the US last year.

Some of these shows will no doubt be successful and others will fall by the wayside. Such is the dice roll when launching any major new game show format. The overall trend, however, is clearly defined and has heavyweight interest. For the next few years at least, programming that takes us back to childhood seems like a solid bet.

## Appendix Table: Top 100 Travelling TV Formats 2020

#	Programme Title	Year of Origin	Country of Origin	Distribution Company	Total Sales
1	<i>Who Wants to be A Millionaire?</i>	1998	UK	Sony Pictures Television	102
2	<i>Deal Or No Deal</i>	2000	Netherlands	Banjay Rights	85
3	<i>Got Talent</i>	2006	UK	Fremantle	78
4	<i>The Voice</i>	2011	Netherlands	ITV Studios	70
5	<i>Family Feud</i>	1976	USA	Fremantle	68
6	<i>MasterChef</i>	2010	USA	Banjay Rights	65
7	<i>Dancing with the Stars</i>	2004	UK	BBC Studios	63
8	<i>Minute To Win It</i>	2010	USA	Banjay Rights	62
9	<i>Survivor</i>	1997	UK	Banjay Rights	58
10	<i>Are You Smarter Than.....?</i>	2007	USA	MGM	57
11	<i>The X Factor</i>	2004	UK	Fremantle	56
=	<i>Idols</i>	2001	UK	Fremantle	56
13	<i>The Money Drop</i>	2010	UK	Banjay Rights	55
14	<i>Cash Cab</i>	2005	USA	All3Media	52
15	<i>Wheel of Fortune</i>	1975	USA	CBS	49
=	<i>Weakest Link</i>	2000	UK	BBC Studios	49
17	<i>Next Top Model</i>	2003	USA	CBS	48
=	<i>Big Brother</i>	1999	Netherlands	Banjay Rights	48
19	<i>You Can't Ask That</i>	2016	Australia	ABC Commercial	47
20	<i>Come Dine With Me</i>	2005	UK	ITV Studios	46
21	<i>Hole in the Wall</i>	2006	Japan	Fremantle	45
22	<i>Dragons' Den</i>	2001	Japan	Sony Pictures Television	43
23	<i>The Voice Kids</i>	2012	Netherlands	ITV Studios	42
=	<i>The Masked Singer</i>	2015	South Korea	MBC/Fremantle	42

25	<i>Your Face Sounds Familiar</i>	2011	Spain	Banijay Rights	40
26	<i>1 Vs 100</i>	2000	Netherlands	Banijay Rights	39
=	<i>The Price is Right</i>	1950	USA	Fremantle	39
=	<i>Gogglebox</i>	2013	UK	All3Media	39
=	<i>My Mom Cooks Better than Yours</i>	2014	Spain	Fremantle	39
=	<i>Fort Boyard</i>	1990	France	Banijay Rights	39
=	<i>The Farm</i>	2001	Sweden	NENT Studios UK	38
32	<i>I Love My Country</i>	2008	Netherlands	ITV Studios	36
=	<i>Take Me Out</i>	2008	Australia	Fremantle	36
34	<i>Singing Bee</i>	2007	USA	Magnify Media	35
35	<i>The Moment of Truth</i>	2007	Colombia	Electus	34
=	<i>The Dating Game</i>	1965	USA	Sony Pictures Television	34
=	<i>The Great British Bake Off</i>	2010	UK	BBC Studios	34
38	<i>Farmer Wants a Wife</i>	2001	UK	Fremantle	33
39	<i>The Biggest Loser</i>	2004	USA	Banijay Rights	32
=	<i>The Bachelor</i>	2002	USA	WBTVD	32
=	<i>Wipeout</i>	2008	USA	Banijay Rights	32
=	<i>Undercover Boss</i>	2009	UK	All3Media	32
43	<i>Fear Factor</i>	1999	Netherlands	Banijay Rights	31
=	<i>Killer Karaoke</i>	2009	Lebanon	Banijay Rights	31
=	<i>MasterChef Junior</i>	2010	UK	Banijay Rights	31
=	<i>Wife Swap</i>	2003	UK	Banijay Rights	31
=	<i>Married at First Sight</i>	2013	Denmark	Red Arrow Studios International	31
=	<i>Big Brother Vips</i>	2000	Netherlands	Banijay Rights	31
=	<i>Project Runway</i>	2004	USA	Fremantle	31
50	<i>Kitchen Nightmares</i>	2007	USA	All3Media	29
=	<i>The Wall</i>	2017	USA	Banijay Rights	29
=	<i>Greats</i>	2002	UK	BBC Studios	29
53	<i>Test the Nation</i>	2001	Netherlands	WBTVD	27

=	<b><i>So You Think You Can Dance</i></b>	2005	USA	Banijay Rights	<b>27</b>
=	<b><i>Top Chef</i></b>	2006	USA	NBC Universal	<b>27</b>
=	<b><i>Anything Goes</i></b>	2013	France	Banijay Rights	<b>27</b>
=	<b><i>My Man Can</i></b>	2012	Germany	Red Arrow Studios International	<b>27</b>
58	<b><i>First Dates</i></b>	2013	UK	WBTVD	<b>26</b>
=	<b><i>Power of 10</i></b>	2007	USA	Sony Pictures Television	<b>26</b>
=	<b><i>Thank God You're Here</i></b>	2006	Australia	Fremantle	<b>26</b>
61	<b><i>Operation Triumph</i></b>	2001	Spain	Banijay Rights	<b>25</b>
=	<b><i>The Apprentice</i></b>	2004	USA	Fremantle	<b>25</b>
=	<b><i>Hollywood Game Night</i></b>	2013	USA	NBC Universal	<b>25</b>
=	<b><i>Child's Play</i></b>	1982	USA	Fremantle	<b>25</b>
=	<b><i>Ninja Warrior</i></b>	1997	Japan	TBS/Storylab	<b>25</b>
=	<b><i>Popstars</i></b>	1999	New Zealand	Banijay Rights	<b>25</b>
=	<b><i>Deal With It</i></b>	2010	Israel	Keshet International	<b>25</b>
=	<b><i>Dating in the Dark</i></b>	2009	Netherlands	ITV Studios	<b>25</b>
71	<b><i>Celebrity MasterChef</i></b>	2006	UK	Banijay Rights	<b>24</b>
=	<b><i>The Bar</i></b>	2000	Sweden	NENT Studios UK	<b>24</b>
=	<b><i>Four Weddings</i></b>	2009	UK	ITV Studios	<b>24</b>
=	<b><i>Divided</i></b>	2012	Netherlands	ITV Studios	<b>24</b>
74	<b><i>All You Need Is Love</i></b>	1992	Netherlands	Banijay Rights	<b>23</b>
=	<b><i>Brainiest</i></b>	2001	UK	Sony Pictures Television	<b>23</b>
=	<b><i>Celebrity Splash</i></b>	2012	Netherlands	WBTVD	<b>23</b>
=	<b><i>Lip Sync Battle</i></b>	2015	USA	VIS	<b>23</b>
=	<b><i>Hell's Kitchen</i></b>	2004	UK	ITV Studios	<b>23</b>
=	<b><i>Hollywood Squares</i></b>	1965	USA	CBS	<b>23</b>
80	<b><i>Guess My Age</i></b>	2016	France	Vivendi Entertainment	<b>22</b>
=	<b><i>Little Big Shots</i></b>	2016	USA	WBTVD	<b>22</b>
=	<b><i>Pyramid</i></b>	1973	USA	Sony Pictures Television	<b>22</b>
=	<b><i>Ready Steady Cook</i></b>	1994	UK	Banijay Rights	<b>22</b>
=	<b><i>Worst Driver</i></b>	2002	UK	Passion	<b>22</b>
=	<b><i>Power Couple</i></b>	2014	Israel	Dori Media	<b>22</b>

86	<b>Boom!</b>	2015	Israel	Keshet International	21
=	<b>Supernanny</b>	2004	UK	WBTVD	21
88	<b>Brainteaser</b>	2001	UK	Banijay Rights	20
=	<b>Don't Tell The Bride</b>	2007	UK	NENT Studios UK	20
=	<b>Jeopardy</b>	1964	USA	CBS	20
=	<b>Let's Make a Deal / The Big Deal</b>	1963	USA	Fremantle	20
=	<b>Love Island</b>	2015	UK	ITV Studios	20
92	<b>The Newlywed Game</b>	1966	US	Sony Pictures Television	19
=	<b>Greed</b>	1999	USA	Fremantle	19
=	<b>The Mole</b>	1998	Belgium	Primitives	19
=	<b>Who Wants To Marry My Son?</b>	2006	Netherlands	WBTVD	19
=	<b>Identity</b>	2006	USA	Banijay Rights	19
=	<b>Temptation Island</b>	2001	USA	Banijay Rights	19
=	<b>Star Academy</b>	2001	Netherlands	Banijay Rights	19
99	<b>Lingo</b>	1987	UK	All3Media	18
=	<b>Performing As</b>	1990	USA	Banijay Rights	18
=	<b>Dancing on Ice</b>	2006	UK	ITV Studios	18
=	<b>Star Academy</b>	2001	Netherlands	Banijay Rights	18
=	<b>The Vault</b>	2000	Israel	Keshet International	18
=	<b>Who Do You Think You Are?</b>	2004	UK	WBTVD	18
=	<b>10 Years Younger</b>	2004	UK	All3Media	18
=	<b>Clash Of The Choirs</b>	2007	USA	Banijay Rights	18
=	<b>The Chair</b>	2002	New Zealand	WBTVD	18
=	<b>All Together Now</b>	2018	UK	Banijay Rights	18

Note: Sales number for Banijay Rights', WBTVD's, and NENT Studio UK's titles in this table is our estimation.

# Special Focus: Tracking the Asian Giants (2020–2021)

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## INTRODUCTION

As you will see from the data in our main report, much of the most interesting activity in the unscripted format market right now is coming from Asia. South Korea has established itself as a market heavyweight, alongside perennial leading export territories such as the US, UK and Netherlands. At the same time, Vietnam is emerging as one of the most prolific importers of formats, the most active buyer in the region for the third year running.

Taken together this data suggested a deeper dive into what is selling – and what is being sold – in Asia would be a fruitful exercise. Here, then, is some additional insight into this high-performing region.

*Note: This report sources sales data from dominant distributors in Asia and around the world. For specific figures please contact distributors for further information.*

## Format Stars in Asia in 2020

### BEST-SELLING ASIAN UNSCRIPTED FORMAT 2020:

#### *The Masked Singer*

PAGE 27

When we look at the best-selling Asian formats over the years, some expected titles top the list, such as *Hole in the Wall* and *Dragon's Den*. Both have been on the market for 15 and 20 years respectively. That makes it all the more impressive that newcomer format *The Masked Singer* is already getting close to their success with 42 lifetime sales, 23 of which came in the last year.

### FORMAT TO WATCH: *The Wall Duet*

PAGE 28

One of the rising formats of 2020 is Thailand's *The Wall Duet*, distributed by Workpoint. This format made one sale in 2020 to Vietnam, but caught our eye by adding another six options to that total in the first few months of 2021.

### TOP EXPORTER OF ASIAN UNSCRIPTED FORMATS: CJ ENM

PAGE 29

Given the enormous success of *I Can See Your Voice* and others it is no surprise to see that CJ ENM tops the list with 11 sales and 17 options last year.

### TOP TERRITORY BUYER OF ASIAN UNSCRIPTED FORMATS: USA

PAGE 30

The USA is the biggest non-Asian importer of Asian formats, having bought 22 in total. Eleven of these – half the Asian formats ever bought by the US - were purchased in 2020, underlining just what an explosive year this has been for the territory.

### TOP EXPORTS TO ASIA BY GENRE:

#### REALITY COMPETITION - Talent

PAGE 31

Studio-based reality talent shows are still the most in demand. Asia has bought 153 shows of this type over the years, with 19 sales or options in 2020.

### TOP 'ON AIR' FORMATS: *The Voice*

PAGE 32

*The Voice* is the most successful format right now, with 13 versions 'on air'.

## Best-Selling Asian Unscripted Format 2020: *The Masked Singer*

Ranking	Programme Title	Country of Origin	Distributor	2020 Sales
1	<i>The Masked Singer</i>	South Korea	MBC/Fremantle	23
2	<i>I Can See Your Voice</i>	South Korea	CJ ENM/Fremantle	7
3	<i>Dragons' Den</i>	Japan	Sony Pictures Television	3
4	<i>Block Out</i>	Japan	Nippon TV/Red Arrow Studios International	2
=	<i>300: War of United Voices</i>	South Korea	CJ ENM	2
=	<i>Just Married</i>	South Korea	MBC	2
=	<i>Immortal Songs</i>	South Korea	KBS	2

When we look at the best-selling Asian formats over the years, some expected titles top the list, such as *Hole in the Wall* and *Dragon's Den*. Both have been on the market for 15 and 20 years respectively. That makes it all the more impressive that newcomer format *The Masked Singer* is already getting close to their success with 42 lifetime sales, 23 of which came in the last year. Given that format sales of *Hole in the Wall* and *Dragon's Den* are slowing down, and *The Masked Singer* is still on the rise, it seems safe to predict that it will become the leading Asian format export before next year's report.

*I Can See Your Voice* is another fast-growing entry, although its 17 sales are some distance away from *The Masked Singer*. Another format that is just starting to make waves is worth highlighting. Nippon TV's boisterous physical challenge show *Red Carpet Survival*, in which contestants must protect a celebrity from outlandish hazards, was picked up for international sales by ITV Studios in April last year, and while it is some distance from the sales levels of *Masked Singer* and *I Can See Your Voice* we expect to see it perform strongly in the future.



## Format to Watch: *The Wall Duet*

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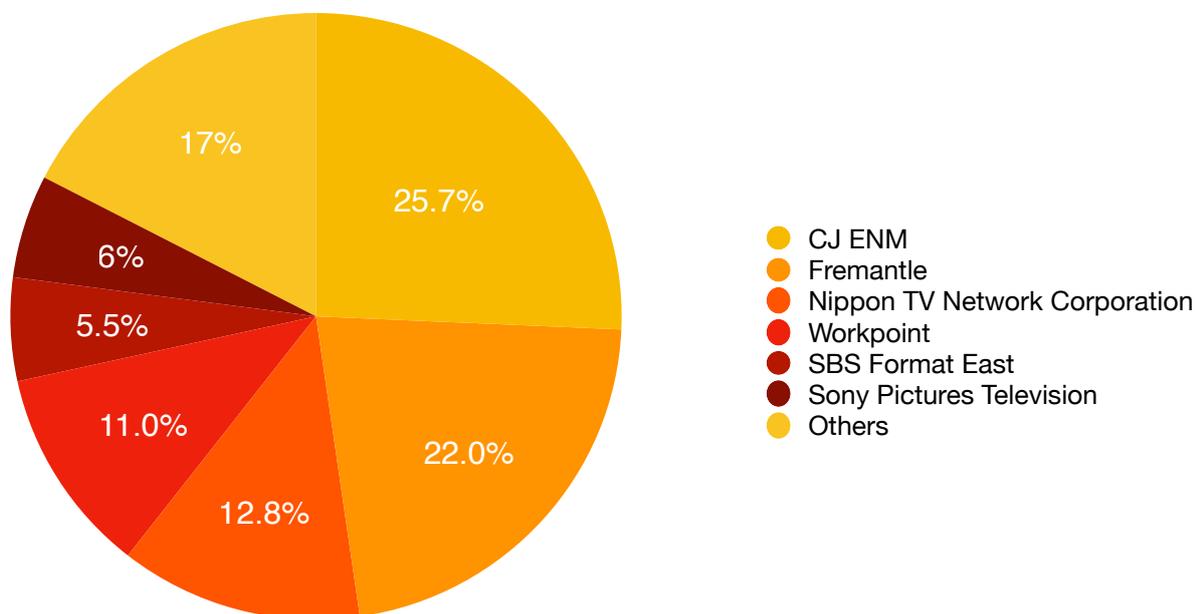
One of the rising formats of 2020 is Thailand's *The Wall Duet*, distributed by Workpoint. This format made one sale in 2020 to Vietnam, but caught our eye by adding another six options (France, Belgium, Spain, Italy, Netherlands, and Germany) to that total in the first few months of 2021.

It's easy to see why the show is attracting so much attention. A celebrity singer performs on stage, joined in a duet by a mystery partner hidden behind a wall. The challenge is to guess who the other singer is: another celebrity, a friend of theirs, or someone else entirely. This all places *The Wall Duet* firmly in the current trend for game show entertainment hybrids, where live performance is turned into a join-in-at-home guessing game.

With a less demanding visual component than *The Masked Singer*, we think this will make the format particularly popular with broadcasters concerned about production costs and while we can't see it outperforming its rivals, the fact that Thailand has joined South Korea and Japan as an Asian export force bodes well for the region's continued growth.

## Top Exporter of Asian Unscripted Formats: CJ ENM

CHART: TOP EXPORTERS OF ASIAN UNSCRIPTED FORMATS BY 2020 SALES AND OPTIONS



*The Wall Duet* distributor Workpoint appears again when we sort the data to identify the companies which sold or optioned the most Asian formats in 2020, landing in fourth place just ahead of multinational Sony. Given the enormous success of *I Can See Your Voice* and others it is no surprise to see that CJ ENM tops the list with 11 sales and 17 options last year, but if we limit the numbers to formats that secured direct sales rather than options then Fremantle (who jointly distributes *The Masked Singer* and *I Can See Your Voice*) takes the top spot with 24 format sales, but no options. Fremantle is also historically the biggest exporter of Asian formats, with 138 lifetime sales from the region.

Japan is traditionally the top exporter, with 254 format sales over the years, but in 2020 South Korea out-performed its neighbour with 67 sales or options to Japan's 29. Whether this represents a long-term reversal of the trend remains to be seen, but the competitiveness suggests a vibrant market. Also suggesting a market on the rise is Thailand's strong showing, with 13 format deals made in the last year by Thailand's biggest unscripted format distributor Workpoint.

## Top Territory Buyer of Asian Unscripted Formats: **USA**

Asia has always had a robust internal format market of its own, but with so many shows from the region breaking out worldwide we thought it would be interesting to see who is buying the most globally.

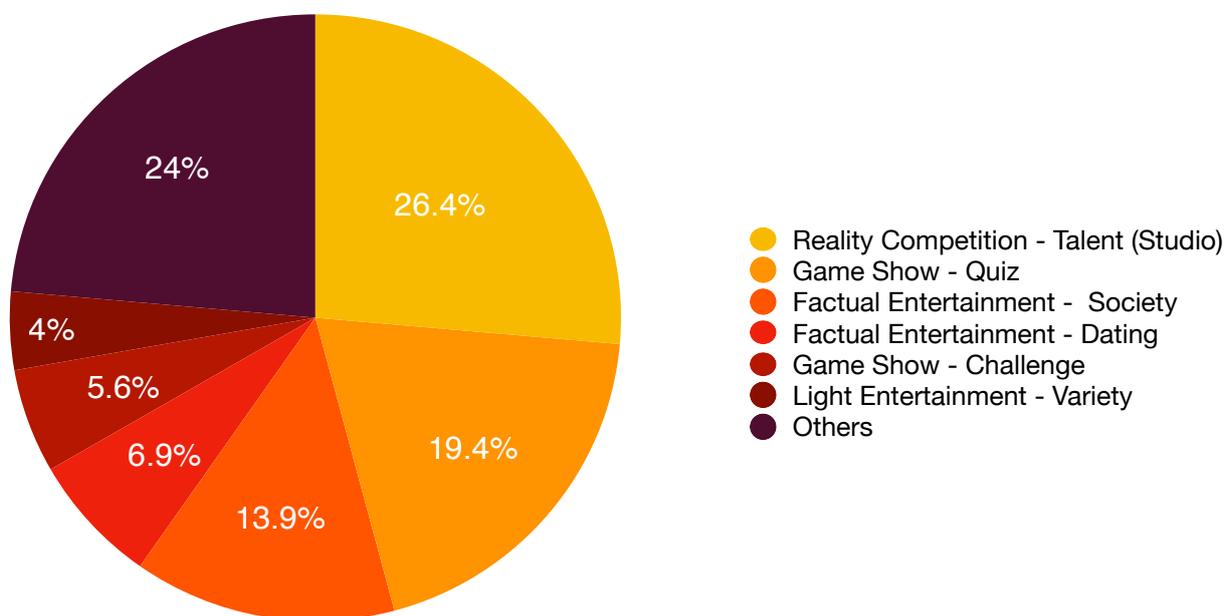
Country of Origin	2020 Sales/Options of Asian formats
USA	11
France	9
The Netherlands	8
Vietnam	8
Germany	5
Finland	4
Norway	4
Spain	4

The USA is the biggest non-Asian importer of Asian formats, having bought 22 in total. Eleven of these – half the Asian formats ever bought by the US - were purchased in 2020, underlining just what an explosive year this has been for the territory. France is next with nine Asian acquisitions in 2020, while The Netherlands is third with eight. Vietnam remains the biggest internal purchaser of Asian formats, matching the Netherlands total of eight formats picked up.

Organising the sales data this way also helps us see the scale of the region's success last year. 41 countries bought an Asian format in 2020, 31 of which were outside Asia.

## Top Exports to Asia by Genre: Reality Competition Talent

CHART: TOP EXPORTERS OF ASIAN UNSCRIPTED FORMATS BY 2020 SALES AND OPTIONS



With so much attention on Asia's sales hits, it's easy to forget that it is still a prolific importer of formats from elsewhere. In terms of what Asian broadcasters are buying, studio-based reality talent shows are still the most in demand. Asia has bought 153 shows of this type over the years, with 19 sales or options in 2020. Quiz shows rank a close second, with 148 lifetime sales and 14 in the last year. Social-themed factual shows, dating shows, physical challenge formats and light entertainment are also still popular there.

It is perhaps also useful to see what kinds of factual formats are not selling in Asia. No property, lifestyle, health and motoring formats were bought by Asian networks in 2020, as local broadcasters already have their own shows in these areas and, compared to shiny floor entertainment formats, have less sponsorship appeal - a key factor in Asian commissioning.

## Top 'On Air' Formats

Our report is, of course, a forward looking one, concerned mostly with what has been bought and sold in the last year. One final useful way of slicing the data is to strip away all the recently closed deals and consider only the formats that have versions currently 'on air / live' in 2020 on broadcasters and platforms across Asia.

When we do this, it becomes immediately apparent that Asian viewing tastes are not so wildly divergent from elsewhere. **The Voice** is the most successful format right now, with 13 versions on air. Spin-off, **The Voice Kids**, also has six versions airing in different Asian countries at present. **Who Wants To Be A Millionaire?**, that legendary warhorse of formats, is still on air in nine countries.



The Voice Kids Indonesia Season 4, Aired on GTV

Even the newer titles will be familiar from other regions, with **The Masked Singer** and **I Can See Your Voice** echoing their global success in their home continent, with seven and six currently live versions respectively.

While the currently airing titles may be very familiar, the message they send is actually extremely useful and encouraging. The list of the formats with the most on-air versions in Asia does not look that different from the same list from other regions, suggesting that this is a region that is truly open to the international format market, where strong concepts thrive regardless of their point of origin. That can only bode well for future sales – whether into or out of Asia.

*Note: By 'Live' or 'On Air' we mean any series that has been on air in the last year, or that there are plans to make or air a brand new series in the next 12 months.*

## Methodology

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- † Unless otherwise stated, all data is based on information supplied to us directly by each distributor. The Top 100 Formats list is based solely on the number of country sales by title. Banijay Rights, NENT Studios UK and WBTVD did not submit sales data for this year.

## Disclaimer

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- † Unless otherwise stated, sales information has been provided by each distributor. Every effort has been taken to validate this data, however K7 will not be held responsible for any inaccuracies in third party provided information.

## Compiled by

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## About K7 Media

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**Founded in 1998, K7 Media is a global independent organisation providing media intelligence to broadcasters, streaming platforms, distributors and production companies across the world.**

Drawing on the team's extensive knowledge of the international TV and digital sector to produce personalised research, showreels and reports, K7 Media is retained as a trusted source of industry insight for clients across the world.

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