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# COPRODUCTIONS : MAKE IT HAPPEN ! SUMMARY



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# MARKET HAS EVOLVED

## **Scripted :**

A series market impacted by the 2023 writers/actors strikes

Commercial TV by a less profitable ad market

Streamers strategies still WIP

→ Less scripted TV commissioning in 2024 (-25%, acc to *Ampere Analysis in march 2025*) but stable :

→ Most demanding countries are in Europe and PSB come first  
(55% of fiction commissioned by PSB / 31% private ones / 14% streamers in 2023. EAO)

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### **Unscripted :**

Within the last 2 years, commissioning has changed.

Writers' and actors' strikes of 2023

→ reliance on unscripted shows, quicker and cheaper to fill the gap

Post-Pandemic Contraction / end of peak TV era.

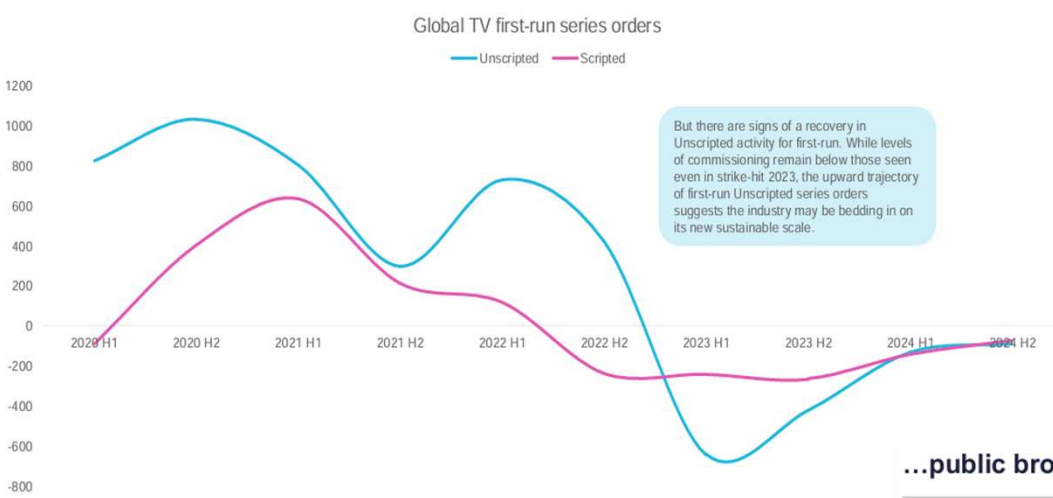
Cost-Cutting measures

Evolving Platform Strategies

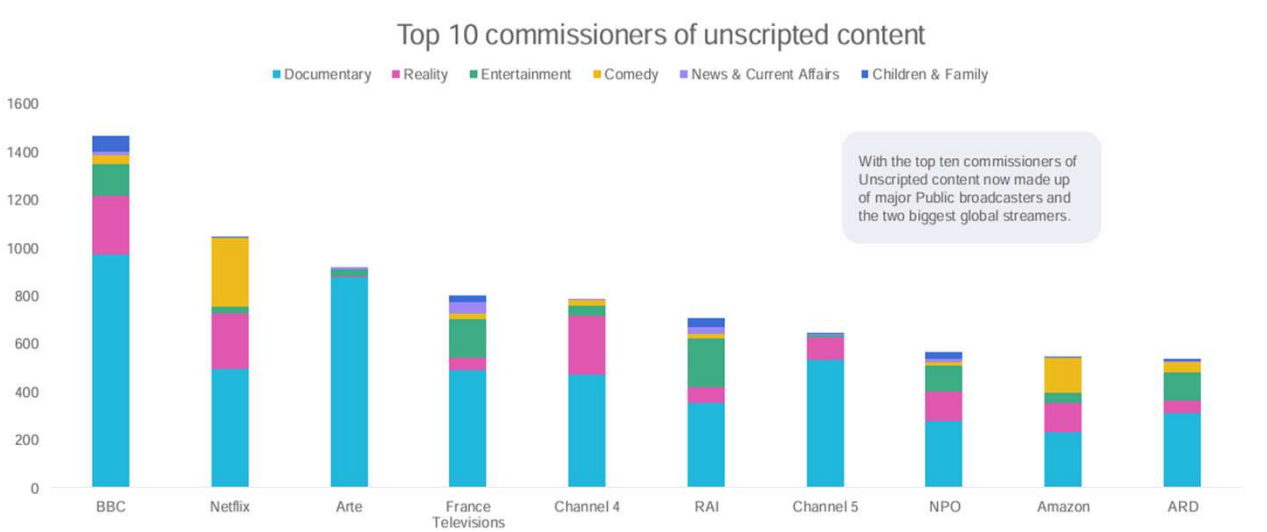
→ leading to fewer original commissioning, more proven formats and expensive 'anchor' shows

→ focus on innovative formats and new business opportunities in the international market.

...but first-run Unscripted orders are showing the first signs of recovery



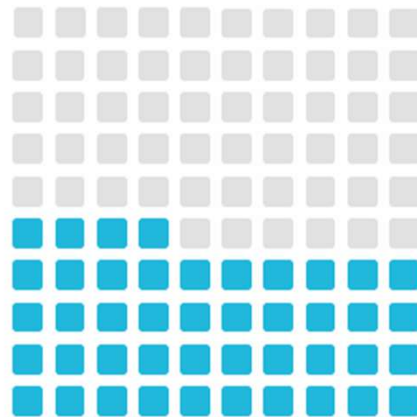
...public broadcasters & 2 global streamers now make up top 10 of largest Unscripted commissioners



Source: Ampere Commissioning

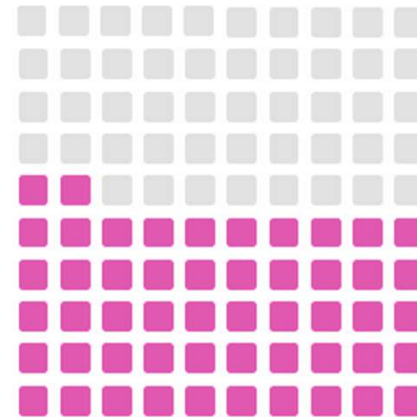
## TV show orders by the 'Global 6' streamers

**44%** Of commission titles were  
Unscripted



2020

**52%** Of commission titles were  
Unscripted



2024

Based on 6,049 TV show orders by the 'Global 6' streamers. The Global 6 are: Netflix, Amazon, Apple, Max, Paramount+, Disney+

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# TODAY

Broadcasters' budgets are shrinking

Linear broadcaster's audience is growing old and needs to be retained

Young audience don't consume the same content as older ones

AI is transforming the audiovisual chain

Some pieces of content are harder to make (middle range features, docs) or genres

**Local** fiction stays Queen in her castle (vs Acquisitions of ready-made)  
**Unscripted** deal take more time to happen.

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# INDIE PRODUCERS' CONSTRAINTS

Newcomers need to start within their local territory before stepping in the international stage.

Risk averse market.

Less episodes / season

Smaller budgets

Broad resonance of a TV series theme or mandatory ability for an unscripted format to travel : global potential wanted !

Constant benchmark about commissioners' guidelines, here and abroad.

Packaging is complex.

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## ...AND OPPORTUNITIES

Partnerships become a new norm.

Collaborations. Are. welcome.

**Unscripted** shows offer partnerships

**Scripted** coproduction has multiple faces today, from organic collaboration to international cofinancing :

Coproductions = international co-financing, as well.





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# COMMISSIONNERS' SOLUTION : ALLIANCES FOR FICTION

Commissioners strikes more alliances against streamers to retain rights. 2 to...16!

To strengthen societal messages sent to a global audience and shared in each of the countries

To get a bigger budget than the local one

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# TPOLOGY OF SCRIPTED COPROS

Epic / Adventure

Human Drama

Fish-out-water comedy - dramedy

Cops & investigation

Criminal underworld

Political / techno / eco thriller

Spy / action thriller

(Based on IP or original concept)

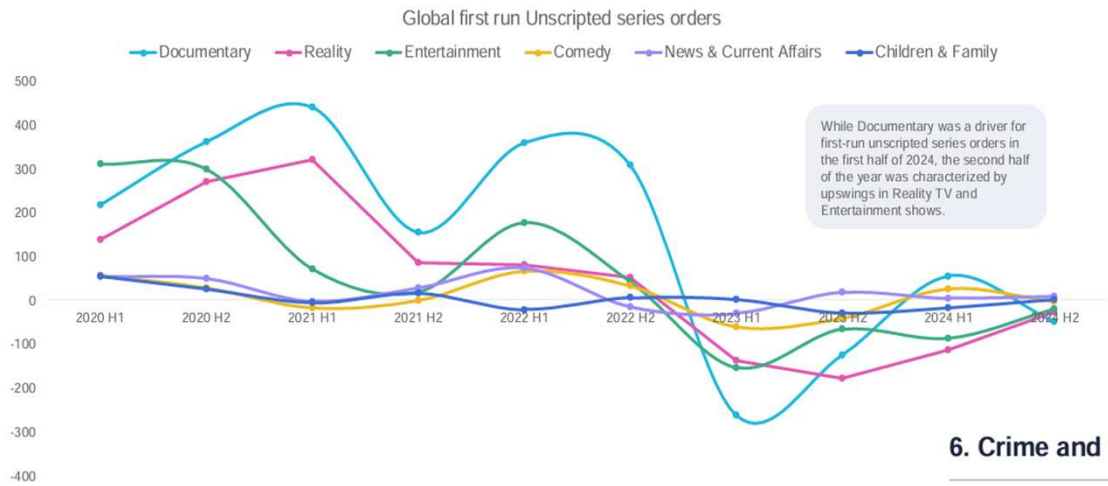
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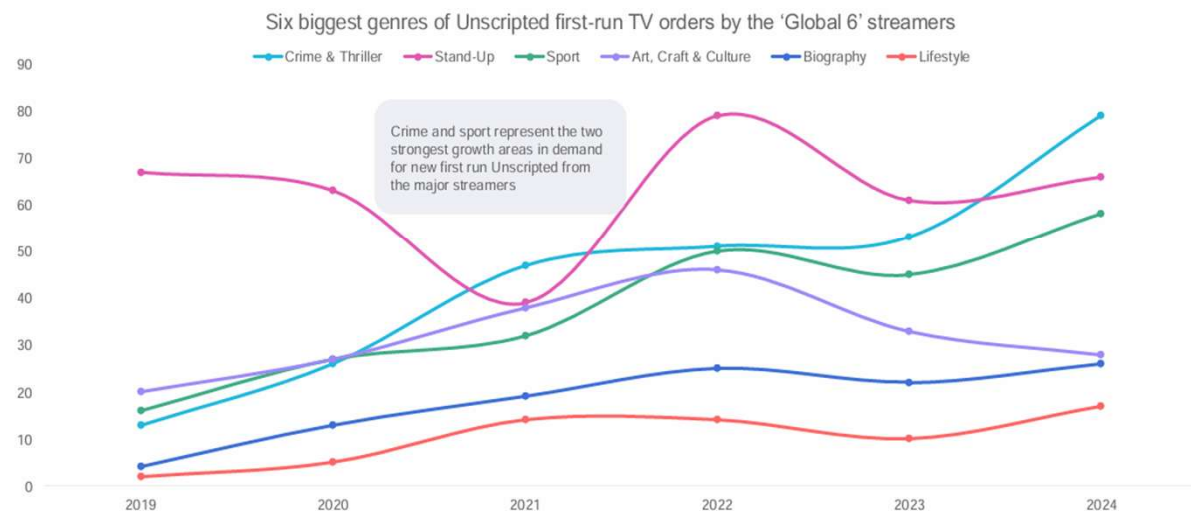
# UNSCRIPTED TRENDS



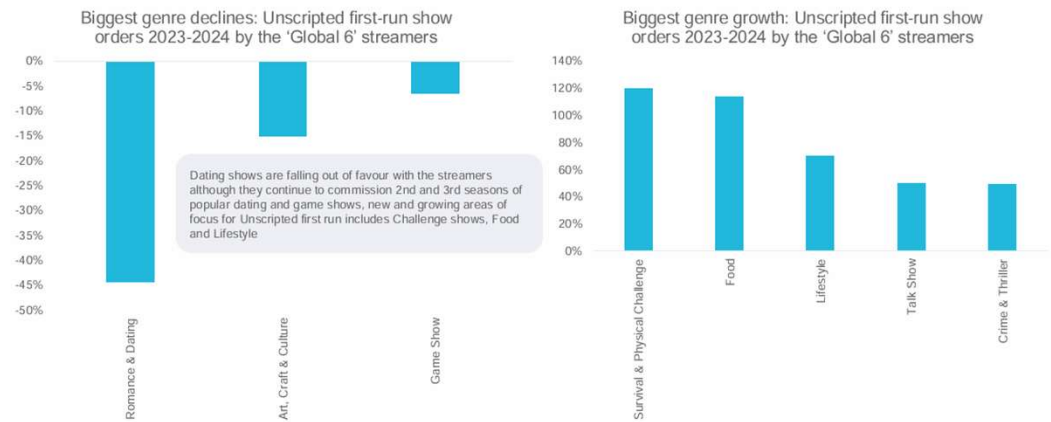
2. Reality TV and Entertainment shows are driving the upswing



6. Crime and sport continue to be key areas of focus for Unscripted activity of the major streamers



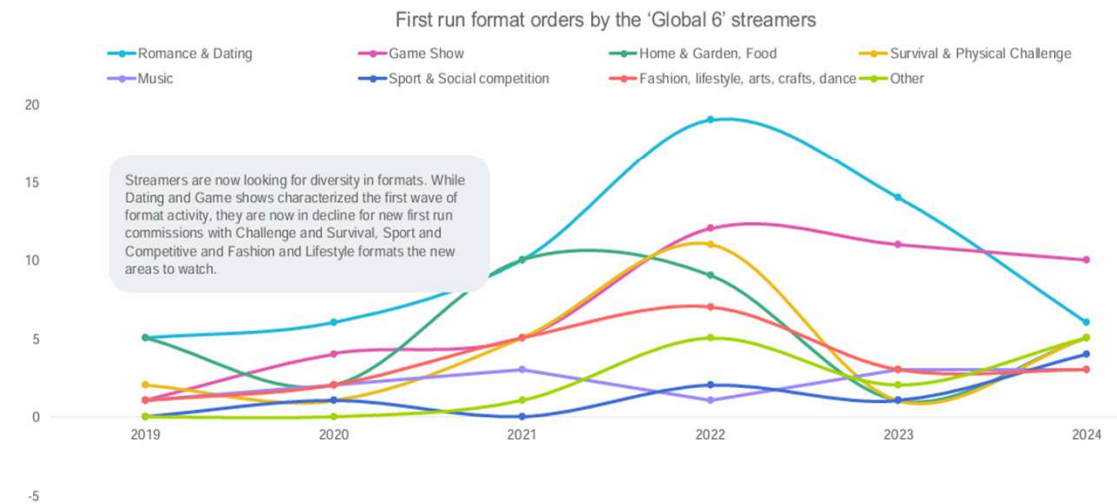
8. For streamers, Talk Shows and Dating are out for new shows but food and sport are in



Based on 950 Unscripted show orders by the 'Global 6' streamers during 2023 and 2024. Only genres with at least 20 show orders analysed. The Global 6 are: Netflix, Amazon, Apple, Max, Paramount+, Disney+

Source: Ampere Commissioning

10. Game Shows and Dating show formats in decline as streaming formats diversify



Source : 10 Unscripted TV trends you need to know

# TREND : IRL STORYTELLING-LIVING

renovation + sustainability



The salvages squad

dating + van life / 2d hand clothing



Love on the road  
Love island



travel +actors + people's ranking



Zero stars

competition + content creator / IRL experience



Beast games  
Squid game



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# FICTION : DO YOU SPEAK COPRO?

Your project

Your capability as coproducers



The state of the market

What do commissioners want

# YOUR VISION HAS THE COPRO LOOK&FEEL

- 
- **Story** resonates in each country crossed by the characters.
  - Your choice of partners mirrors the journey.
  - Each country audience relates (story, **characters, location**).
  - Sharp **visuals** help readers get under the skin of the selected countries/character's specificities.



# YOUR PROJECT + CAPABILITY AS COPRODUCER

Be aligned with partners about :

- **Model** of coproduction
- **Vision** around the IP
- Creative **contribution** and communication scheme
- **Talent onboarding** abilities.
- Common agenda and producers' availability
- How much editorial input do you actually want from partners?
- Specificities of each countries (legal, writers fees, use of AI, etc )

# FINANCING MODELS + PARTNERS

## Reminder :

### Model of coproduction

- Pre-sales vs organic coproduction
- Check the current windowing deals terms

### Financing capacity

- Could an alliance with a more experienced /identified partner propel your company on the international scene?
- Check new market opportunities such as



# THE STATE OF THE MARKET

## Check list :

- Is your budget realistic? Both locally and internationally
- Is your financial plan up-to-date reg windowing and investment of potential partners?
- Clear-cut positioning of your show on the local+ global markets
- Market needs fresh, appealing AND yet reassuring for commisionners. Is there a demand for your genre(s)?

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**CONCLUSION - REMINDER :**

**EUROPEAN COPRODUCTIONS DO MATTER**



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## **CONCLUSION :**

**THE LIQUID STATE OF OUR INDUSTRY**  
**COMPANIES**  
**CONCEPTS**  
**TALENTS**  
**& IPs**

Time to **collaborate**...

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# THANK YOU



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