

# IMPACT OF GLOBAL STREAMING PLATFORMS ON TELEVISION PRODUCTION: A CASE STUDY OF CZECH CONTENT PRODUCTION

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**ABSTRACT** *The television industry is facing new challenges when adapting to the current streaming culture and exploring possibilities of digital distribution. Global streaming services are perceived as a major source of audiovisual entertainment in various countries regardless of the cultural and national heritage of the viewers and thus market competition has immensely increased. This paper focuses on the influence of global video-on-demand (VOD) services on audiovisual production on a national scale. The emphasis is on television production as the audience is transferring into the digital environment – this is perceived as an opportunity for television to appear more competitive while drawing on its unique knowledge of the national audience. The case study demonstrates how the audiovisual industry in the Czech Republic is an example of a strongly nationally oriented market whose evolvement is impacted by the presence of global platforms such as Netflix or HBO Max. Furthermore, by providing examples from the Czech platforms' market, the case study also illustrates the expansion of local broadcasting providers into the digital sphere.*

## KEY WORDS

PLATFORMS, AUDIOVISUAL, STREAMING, VIDEO ON DEMAND, CZECH REPUBLIC, TELEVISION

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## INTRODUCTION

The interactivity of the new media supports the differentiation between watching broadcast television as a traditional medium on the one hand, and using digital tools on the other. Selected studies even perceive the decline of television broadcasting due to such a challenge and due to the fact that digital tools present a contrast to the established television culture. John Fiske (1987) recognized popularity of television in the fact that television encourages interaction of the viewer in the sense of understanding of what he or she sees. Popularity of digital tools still persists in the interactive dimension, however the technology has further broadened possibilities of interactivity itself. Various perspectives can be used to analyze the transition from linear broadcast to digital distribution. The theoretical framework of this paper addresses key points when taking such perspectives and inquires into how each approach focuses on another aspect of the transition. According to Lotz (2014), the transition acts in favor of the digital distribution because the customer becomes a self-curator of content that is more easily accessible. The affordance of Internet protocol technologies to deliver personally selected content from an industrially curated library is the central difference introduced by this new distribution mechanism (Lotz, 2017, p. 4). On the contrary, Miller (2010) offers arguments supporting the important role of television as an institution on the market that participates in international export, import and production. Wolff (2015) perceives the transition to the digital sphere only as a way of reshaping television and not necessarily taking advantage of the Internet media. It can be noted that the audiovisual media still perform as a passive form of entertainment, making use of established narrative structures and aesthetics. Ramon Lobato (2020) recognizes the transition as a development of the traditional media, which contributes to the extension of the possible distribution channels and as a further specialization in content production. This includes quality drama made explicitly for binge viewing, proliferation of short-form web comedies and the vast pool of amateur content on YouTube (Lobato, 2020, p. 31).

To further understand the new infrastructure of the market, it can be acknowledged that such cultural transformation is consequent to the dynamic role in the society, their newly adapted habits and opportunities. More precisely, Mittel (2015) notes that contemporary cultural transformations are tied to the emergence of digital media and more interactive forms of entertainment. Digital tools make part of our every day as silent partners, helping us – with no agendas of their own (Gillespie, 2003, p. 117). This means that a significant transformation in customer behavior can be identified and that the influence of platforms has a complex impact on many levels. The audience has fewer and fewer limitations when choosing the content with an increase of possible opportunities how to watch the content. Technology has brought a variety of smart gadgets to enable streaming of content nearly anywhere and anytime (Arditi, 2021). Consumption of the content is limited by the offer available at current time, in the terrestrial area and by the chosen provider (Gripsrud, 2010). The majority of providers of audiovisual content offer user-friendly applications that make watching any audiovisual content including television even easier. Tryon (2013) defines the term *on-demand* as a service which breaks the notion of time and place supporting specific audience mobility.

Discussions on the new structure of the audiovisual market and the future role of the traditional television medium build on the possibilities of digital media and their ability to surpass territorial boundaries. From this perspective, television appears to be outdated and to be replaced by the global streaming services. However, the role of television broadcasters is still strong on the national level and digital distribution appears to be a next step for the television industry. This paper proposes an approach in which global video-on-demand providers impact content production on a local level and act as initiators of the transformation in the audiovisual industry.

## **GLOBAL PLATFORMS VS. LOCAL CONTENT PRODUCTION**

In 2021, the European Audiovisual Observatory published a report detailing trends and development on the market of video on demand in Europe. The market turnover multiplied by 30% comparing the years 2010 and 2020 (European Audiovisual Observatory, 2022). The increase is mainly due to the expansion of Netflix outside of the United States, which ranks Netflix as a subscription video-on-demand platform with the largest share on the European market.

The issue of globalization and transnationalism has been present in the recent decades including the significant influence of the global provider on the local level. Each media era is specific in terms of the expansion of a new technology that challenges the usual market structure and industry production. Wieten et al. (2000) argue that dealing with the issue of transnationalism in the television industry first appeared in the 1980s with the implementation of satellite and cable television, which introduced American culture and fandom to the global world. Lotz (2017) argues that further digitalization and implementation of format adaptations provoked an even more competitive environment on the market. Industrial change often leads to striking changes in style and aesthetics, storytelling norms and representation (Herbert et al., 2020, p. 84). Sundet (2021) suggests that the contemporary issue of the presence of global platforms marks another era of the evolution of the industry, but does not necessarily imply the descent of television culture. Localization matters in television markets, and the global will not simply displace the local (Lobato, 2020, p. 109).

Contemporary media production has entered a streaming era which brings new opportunities, but at the same time poses new challenges. Sundet (2021) perceives streaming as a game-changer in the television industry and mentions the following three aspects: the introduction of new program schemes, breaking of territorial boundaries, and the creation of a globally oriented television market. Netflix is one of the major initiators of the streaming era which leads to the recognition of Netflix being an infrastructure builder (McEntree, 2010). It has developed content delivery on its own, as well as various software tools and processes, some of which are available as open-source projects (McEntree, 2010). Still, the infrastructure of Netflix is a dynamic metasystem with many contradictions, such as the need of soft and hard technical structures, open and closed knowledge system and public and private investment (Lobato, 2020, p. 101). The presence of global platforms

on the market incites the discussion on content regulation in the context of EU policy processes and on how to establish fair common rules for market competition (Farchy et al., 2022; Micova et al., 2018).

The presence and increasing number of subscribers of streaming platforms pose challenges to television providers in order to evaluate their current position in the market. As the introduced theoretical framework indicates, television as a traditional medium represents a valuable competitor for global streaming platforms. The challenge is to produce more competitive content and to appear more appealing for the local audience. Alongside this, the television industry is specific for its division into public service broadcasters and commercial broadcasters.

Key trends in European television suggest the general pattern which consists in the fact that commercial broadcasters tend to display considerably less diversity in their programming compared to public broadcasting service and to follow rather confined patterns (Wieten et al., 2000, p. 26). The public broadcasting service needs to abide by guidelines to fulfill the service of a public broadcaster by following principles such as commitments to universality, excellence, diversity, accountability, and innovation (Tracey, 1998). However, public broadcasting service is often perceived as less creative, stagnant, and too bureaucratic in comparison to the commercial one. Tracey (1998) further explores the idea of a public service system which would be devoid of any commercial or political motives and would have as its sole purpose the offering of a public service, thus remaining fragile and easily breakable. On the contrary, recent research by Sundet (2021) on the Norwegian public broadcaster NRK suggests that television drama productions are going big, aiming for larger, preferably transnational markets and audience groups via larger budgets and 'world-class' production values (Sundet, 2021, p. 52).

Local television productions have the advantage to produce more relevant content with higher authenticity for the audience. Local media systems and TV cultures continue to pre-structure transnational audiences' encounters with non-domestic content (Athique, 2014). Industry dynamics is often situated in relation to the cultural politics of nation-states with emphasis remaining on films and television programs on the one hand and audience reception on the other (Herbert et al., 2020, p. 93). Genre conventions have the ability to express the overview of the society or a given audience group. They connect the audience with the current ideological concerns of the time and also form a communication tool of both understanding and constructing the relationship between the producer, text and audience (Fiske, 1987, p. 110).

## METHODOLOGY

Based on the previous literature review and proposed theoretical concepts, this paper aims to explore the influence of global platforms on the local content production through a case study of the audiovisual market of the Czech Republic. The hypothesis of the study is based on the recognition that the presence of global video-on-demand

services on the market challenges local audiovisual production and impacts traditional content producers.

The first part of the paper presents the results of the case study that addresses the introduction of the Czech audiovisual market and is structured into three parts: analysis of the national market and its limits, structure of the Czech television market, and video-on-demand market in Czech Republic. The introduction of the Czech audiovisual market is based on analysis of publicly available documents and Annual Overview of the Czech Media Market conducted by ATO-Nielsen Admosphere (Mediaguru, 2022), year-round data from the Czech Statistical Office (Czech Statistical Office, 2021) and media report by Atmedia (Atmedia, 2022).

The majority of the collected data were received from official publicly available materials published by The Czech Film Fund, Czech Television and TV Nova. Specifically, this involved an analysis of the annual reports of the institutions and of the official press releases.

In order to illustrate the issue of the impact of global streaming services on local content production, in the second part of the case study, two examples from the Czech audiovisual market are presented. They exemplify content production of television broadcasters and their original production distributed via their own video-on-demand platforms. The time frame was selected to cover recent and the most relevant years - the influence of global video-on-demand providers on local markets became visible in 2016, when Netflix introduced its own service in the Czech Republic and HBO offered the subscription service in 2017. The case study focuses on production since then with an emphasis on production in recent years.

The aim is to present a broad overview of the market. Therefore, the first example addresses the public broadcasting service Czech Television and its digital expansion. As a second example, the private television provider TV Nova, which has a leading position on the Czech television market, was selected.

## **CASE STUDY: INTRODUCTION OF CZECH AUDIOVISUAL MARKET**

### **Analysis of the national market and its limits**

In comparison to other European countries, the Czech audiovisual market can be described as a small one with focus on the national audience. The Czech Republic has a population of 10.7 million, which makes it the 12th country in Europe by population. In order to demonstrate why the Czech audiovisual market is perceived as a small one, and with focus on the national audience, the section titled "Analysis of the national market and its limits" identifies characteristic limits of Czech audiovisual production and further analyzes the market from the point of view of production, funding and distribution.

The local audiovisual industry is mainly limited by use of the national Czech language which is used only within the country with a characteristic exception of Slovakia. Citizens of Czech Republic and Slovakia were both part of former Czechoslovakia<sup>1</sup>, which meant that the audiovisual media and television<sup>2</sup> offered content in both the Czech and Slovak languages. It follows that the contemporary Slovak market is accustomed to distribution of audiovisual content without standard localization attributes, such as subtitles or dubbing in the national language<sup>3</sup>. Furthermore, the Czech Republic and Slovakia have a strong cultural and historical proximity, which means that Czech and Slovak distribution companies often have an international partnership. For example, the company Bontonfilm covers the distribution of both national markets at once. A similar model is adopted when producing audiovisual content and providing co-production service, financing strategy or funding on both markets.

Another point is that the Czech Republic has tradition in dubbing of original foreign content, which supports the fact that the Czech audience is used to consuming content in their local language. In Czechoslovakia, the first international movie was dubbed in 1933, and since then, technologies have kept up with the current audiovisual market to provide Czech audio for majority of international content. The consumption of international content is closely tied to English language proficiency and exposure to international content. Up until now, nearly every US production show, soap opera or series which is broadcast on a television, has been dubbed in the Czech language. This implies the fact that Czech society was not used to exposure to international content in its original version. Furthermore, in comparison to other European countries, the educational system in the Czech Republic was late to include English as a mandatory foreign language to learn since elementary school. The generations of Czechs born before 1990s, were taught the German language or the Russian language as part of their education. Both these factors have contributed to lower English language proficiency in Czech society.

Another limitation of Czech audiovisual production is perceived in content adapted to the local audience, cultural heritage and sociocultural factors. Storylines and character roles build on national stereotypes, use of regional dialect, local traditions and particularities. Often, these elements can be hard to grasp for an international audience and assume different meanings when translated into other languages.

However, the Czech audiovisual market is well established and with rather high rates of production for a country of this size. The Czech Republic is often chosen as a location for runaway productions, so the industry is very well equipped from the technical point of view. Local crew and personnel are experienced in filming international projects and their expertise is often on a high level. The first Czech film production company Barrandov Studio was founded in 1921 and later, in 1932, the company's own film studios started operating in Prague, which provided additional services such as props and wardrobe

<sup>1</sup> Czechoslovakia: former country in central Europe formed in 1918. On January 1, 1993, Czechoslovakia separated into two new countries, the Czech Republic and Slovakia.

<sup>2</sup> Czechoslovak Television: founded in 1953, in 1992 succeeded by Czech Television

<sup>3</sup> For example former HBO Go (currently Max) started offering Slovak dubbing of original content since December 2021; up until then the content offered only Czech dubbing for both Czech and Slovak subscribers

rentals, camera and light equipment and technological background to serve local and international productions. Barrandov Studio has been very active up until now and has been offering production facilities for recent Netflix or Amazon Prime Video projects.<sup>4</sup>

Audiovisual production in the Czech Republic is well supported through public funding, which offers various funding possibilities for each project. Diverse funding patterns for mainstream content and art content can be identified (Czech Film Fund, 2018) and producers are accommodated to combine different sources in order to cover the budget. The majority of the production in the Czech Republic is funded through the finances provided by the Czech Film Fund, public institutions and regional authorities. The Czech Film Fund provides support for all stages of audiovisual production through selective calls. Every year, the institution puts €14.5 million to support local production. For example, in 2021, 73% of total newly released Czech films received some kind of support<sup>5</sup> from the Czech Film Fund (Czech Film Fund, 2022). The Fund also administers production incentives for audio-visual projects made in the Czech Republic. The annual budget for this cash rebate is €31.4 million (Czech Film Fund, 2022). Producers also take advantage of commercial collaborations and other funding possibilities. Other common options are co-production contracts with a television, a local video-on-demand platform or a distribution company. This practice is supported by the fact that 91% of films distributed in movie theatres in the years 2020 and 2021 were co-produced with a television. Alongside, these co-productions support the role of television as an innovative medium and contribute to its competitive position on the market. In 2021, the public broadcasting service provider Czech Television supported co-production projects with 4.1 million euro; their future investment in co-production projects for years 2022-2024 will total €8.8 million (Czech Television, 2022, p. 77).

The industry has been affected by the coronavirus pandemic in 2020 and 2021 when the production rates lowered, and cinemas were closed or open with restricted capacity for most of these two years. Still, in 2021 local cinemas premiered 85 Czech films. National market share increased during the coronavirus pandemic to 48.3% in 2020 and 41.9% 2021 in comparison to 26.5% in 2019. When comparing national market share to other European countries, the situation in the Czech market is comparable to national market share in France (40.6%), different from neighboring Germany (21.7%) or Slovakia (10.0%) (European Audiovisual Observatory (2022, May)). These figures support the notion that the Czech audiovisual market is focused on the national audience. The growth was supported by the pandemic which caused the postponement of production of many foreign movies and their premieres in the cinema, which means that Czech cinemas premiered more of the local content and showed fewer international movies. The consequence of the pandemic era (years 2020 and 2021) was a natural decrease in box office admissions. Precisely, box office admissions in the Czech Republic reached 7.1 million in 2021, in contrast to 18.3 million in 2019, that is, during the “pre-COVID” period.

<sup>4</sup> Based on the data from The Czech Film Fund; for example, in 2021 – *Carnival Row* (Amazon Prime Video), *Extraction 2* (Netflix), *Dangerous Liaisons 2* (Netflix), *Totems* (Amazon Prime Video), *Ballerina* (prod. Lionsgate)

<sup>5</sup> Support for either development, production and/or distribution (Czech Film Fund, 2022).

The Annual Overview of the Czech Media Market conducted by ATO-Nielsen Admosphere shows that television has a strong audience on the market and its reach is even increasing (Mediaguru, 2022). The Czech audience is thus recognized as accustomed to consuming audiovisual content from local production, which is supported by the following data. The Overview presents media reach including average time spent in front of the TV and numbers of viewers. In 2021, average daily time spent in front of television per person reached more than four hours. Per month, television is watched by 8.4 million within the age group 15+. 96% of Czech households have at least one television, while 10 years ago, it was as much as 98%. This supports the notion that television as a traditional medium acts as the key medium for the Czech audience and the most popular content currently draws around 1-2 million viewers, and very occasionally 3 million viewers. Data analysis shows that the most watched items of television content are newscasts and soap operas on commercial channels. Overall, it is found that the weekly rating evaluates the same kind of most watched content throughout a longer period of time.

### Structure of the Czech television market

Television broadcasting in Czechoslovakia began in 1948 and until the Velvet Revolution in 1989, the only broadcaster was Czechoslovak Television. In the 1990s, the market grew with the introduction of two nationwide commercial channels – Prima TV and TV Nova. The same television media groups have remained dominant on the market up until today. In 1992, Czechoslovak Television transformed into Czech Television, which is a public television broadcaster, which is currently broadcasting on seven channels. As a national provider, this television is funded through a fee collection system of television concession fees, which currently amounts to 135 Czech crowns (5,50 EUR) per month per household. The commercial activities and advertising are restricted by law and the Act on Czech Television<sup>6</sup>, which sets limits in obtaining revenues from sale of advertising.

Television Nova is operated by the media and entertainment group CME and is perceived as the strongest private commercial television on the market. Its channel portfolio is actively expanding, and the company is aiming to have the biggest share of the digital market as well. Part of the group is an online video-on-demand platform Voyo. The third broadcaster, namely FTV Prima operates ten channels including the news channel CNN Prima News in partnership with CNN International. Channels are thematically varied and oriented to a specific target group, such as family program, comedy content, crime shows or content offer for women. Additionally, local television channels have portfolios of content offering international and national programming. Various trends adopted from foreign productions as well as licensed versions of reality TV shows can be identified.

The structure of the market responds to the consumer demand and media television companies offer more channels which are differentiated on the basis of genre and type of content. When referring to the commercial television companies with the highest market share (TV Nova, FTV Prima), their channel offer contains, for example, a movies-only channel, a channel targeted to women, an action channel or a channel with focus on sitcoms and other entertainment formats. The offer of the thematic

<sup>6</sup> See more at: Act on Czech Television — English Pages — Česká televize (ceskatelevize.cz)



channels is based on international content and rebroadcast of their original content. Each commercial television company has a main TV channel which is intended to broadcast new and premiere content, fiction, and non-fiction as well. Original television production is targeted to entertain and promote the local film industry. The boom in high-end television series production started only in the early 2010s, when some of the broadcasters decentralized and started increasingly co-producing or commissioning original serial programming from independent producers (Sczapanik, 2021, p. 14). Research by Sczapanik (2021) supports the notion that local production initiatives of transnational pay television and subscription video-on-demand (SVOD) services triggered the premium television series production.

### Video-on-demand market in the Czech Republic

According to year-round data from the Czech Statistical Office, in 2021, videos on the Internet were watched by an average of 5.5 million people over the age of 16, which represents 63% of this age group in the Czech Republic. The vast majority, about 5 million people, watched free videos (YouTube, Facebook or other sharing platforms). Regarding the category of subscription video-on-demand services, Atmedia (2022) demonstrates current stratification on the market in its periodical Atmedia Index. Data analysis from the first half of 2022 shows that 40% of the Czech population within age group 15-69 use subscription services, averaging at 1.6 million people. Part of the users (13%) stated they subscribed to a video-on-demand service during the coronavirus pandemic.

The first Czech digital platform providing video-on-demand content on the market was DAFilms in 2005 as an online video-on-demand service and streaming platform Stream.cz in 2006. The market has grown by introducing more platforms, both with free access and pay-per-view content. The trend in the industry is apparent success of platforms connected to bigger media companies which have better opportunities for financing of the content and production background. Each television broadcast provider has its own VOD service – iVysílání (public, Czech Television), Voyo (private, TV Nova), iPrima (private, FTV Prima).

Table 1. Video-on-demand services in the Czech market – Czech providers

| Subscription model                | Price / per month | Total number AV content | Country of origin (CZ) | Original production | On CZ market since |
|-----------------------------------|-------------------|-------------------------|------------------------|---------------------|--------------------|
| <i>DAFilms</i>                    |                   |                         |                        |                     |                    |
| SVOD                              | €5.95             | 3670                    | 442                    | N                   | 2005               |
| <i>Edisonline</i>                 |                   |                         |                        |                     |                    |
| SVOD                              | €6.30             | 540                     | 2                      | N                   | 2020               |
| <i>iPrima (former Prima PLAY)</i> |                   |                         |                        |                     |                    |
| Free / SVOD without ads           | X / €3.60         | 1092                    | 376                    | Y                   | 2012               |
| <i>iVysílání</i>                  |                   |                         |                        |                     |                    |
| Free                              | X                 | 1143                    | 753                    | Y                   | 2011               |

| Subscription model               | Price / per month | Total number AV content | Country of origin (CZ) | Original production | On CZ market since |
|----------------------------------|-------------------|-------------------------|------------------------|---------------------|--------------------|
| <b>KVIFF.TV (former Aerovod)</b> |                   |                         |                        |                     |                    |
| SVOD                             | €6.50             | 612                     | 230                    | N                   | 2012               |
| <b>Mall.TV</b>                   |                   |                         |                        |                     |                    |
| Free                             | X                 | 13                      | 7                      | Y                   | 2018               |
| <b>Stream</b>                    |                   |                         |                        |                     |                    |
| Free                             | X                 | 107                     | 16                     | Y                   | 2006               |
| <b>Voyo</b>                      |                   |                         |                        |                     |                    |
| SVOD                             | €6.50             | 1661                    | 778                    | Y                   | 2012               |

Sources: Providers and <https://filmtoro.cz/>

Table 1 presents the Czech video-on-demand services currently operating on the market.<sup>7</sup> There are subscription services and free-to-access streaming platforms, both offering content and being active in their own original production. To further illustrate the local video-on-demand services, this paper will focus on two providers with the greatest amount of content produced in the Czech Republic – iVysílání and Voyo. Both examples will be presented in the following part of the study.

Altogether, on the Czech market, the following international video-on-demand services operate: Amazon Prime Video, Apple TV+, Disney+, HBO Max, Netflix, iTunes and Google Play. Table 2 presents currently available international video-on-demand services with a focus on their localized content offer. Data presented illustrate the total amount of audiovisual content in offer in relation to the amount of content from Czech production. Also, each video-on-demand service has different approach to the localization features such as Czech dubbing of foreign-language content.

Pricing strategies of the companies on the market are comparable and respond to the economic situation within society. In order to illustrate the pricing strategy on the market of subscription video-on-demand platforms in the Czech Republic, monthly subscription rates for international and local platforms are compared. Netflix's monthly subscription ranges from 199 Czech crowns (€8.10) to 259 Czech crowns (€10.60), depending on the chosen streaming plan. HBO Max's monthly subscription costs 199 Czech crown (€8.10) and the same price applies to Disney+ and Apple TV+. The Czech video-on-demand service Voyo costs 159 Czech crowns (€6.50).

In order to provide a complex overview, this paper will focus on video on the following demand services: Netflix and HBO Max. These two providers are the dominant subscription services on the Czech market: Netflix (32%) and HBO Max (17%).

<sup>7</sup> Updated on 1st December 2022.

Table 2. Video-on-demand services on the Czech market – international providers

| Price / per month              | Total number AV content | Country of origin (CZ) | Available in Czech dubbing | On CZ market since |
|--------------------------------|-------------------------|------------------------|----------------------------|--------------------|
| <b>Amazon Prime Video</b>      |                         |                        |                            |                    |
| €6.50                          | 972                     | 6                      | 129                        | 2016               |
| <b>Apple TV+</b>               |                         |                        |                            |                    |
| €8.10                          | 141                     | 0                      | 0                          | 2019               |
| <b>Disney+</b>                 |                         |                        |                            |                    |
| €8.10                          | 1840                    | 0                      | 1077                       | 2022               |
| <b>HBO Max (former HBO Go)</b> |                         |                        |                            |                    |
| €8.10                          | 2155                    | 160                    | 1293                       | 2017               |
| <b>Netflix</b>                 |                         |                        |                            |                    |
| €8.10 / €10.60                 | 8317                    | 240                    | 1027                       | 2016               |
| <b>iTunes</b>                  |                         |                        |                            |                    |
| €8.10                          | 7561                    | 248                    | 2683                       | 2017               |
| <b>Google Play</b>             |                         |                        |                            |                    |
| PPV from €2.70 per movie       | 3709                    | 93                     | 855                        | 2018               |

Sources: Providers and <https://filmtoro.cz/>

The global platform Netflix entered the Czech audiovisual market as early as in 2016. Nevertheless, it is important to note that up until 2019, content was available only in English and without Czech subtitles. The company started to introduce more localized content in 2019 with implementing the option of selecting Czech subtitles or even Czech dubbing. Netflix also made contracts with distribution companies and acquired license for movies and series from Czech production. Current offer includes 239 movies from Czech production and one series which amounts to 2.9% of the whole offering in the territory.<sup>8</sup> Netflix is active in increasing the number of Czech titles in their library. However, as far as is known, the company does not have ambitions to produce its own production content focused on the national audience. The Czech Republic is very often a location of shooting and co-production of Netflix international series or movies, which contributes to the dynamics of the audiovisual production market.

HBO Max (former HBO Go) was previously available only as an extra service with a telecommunication provider. Nevertheless, the full history of HBO goes a few years back when HBO was first introduced into the Czech market in 1994 as part of a cable television package. Since 2008, the company has operated a local office in Prague which is oriented to production and distribution on the national market. HBO participates in co-production of local content with a focus on national audiences and their production is perceived as having cinema-like quality. Important to note, HBO is the only international company producing content with a target market of the Czech Republic. In 2013, it premiered a three-part miniseries *Hořící keř* based on real events from 1969, that later appeared in

<sup>8</sup> Updated on 1st December 2022.

cinemas. The drama received awards at the international Monte-Carlo Television Festival and was screened at the Toronto International Film Festival. The miniseries has ratings of 7.8 on IMDb and 86% on ČSFD<sup>9</sup>. Since 2016, HBO has produced series which have been well-received by critics and has contributed to the development of local drama production. The original content of the platform HBO produced in the Czech Republic includes: *Mamon* (2015), the crime series *Pustina* (2016), *Terapie* (2018), *Až po uši* (2014-2018), *Bez vědomí* (2019).

### EXAMPLE 1: DRAMA PRODUCTION BY THE PUBLIC SERVICE BROADCASTER CZECH TELEVISION

Czech Television, although being a public broadcasting provider, has been successful when facing the competitive environment on the national television market. Production of drama and series is highly prioritized, and either as internal production or external production or co-production. Original drama production is divided according to different program genres such as crime series, comedy, sitcom or period drama. An example of a recently premiered series is *Zločiny Velké Prahy* (2021). Data provided by Czech Television suggest that the average viewership of each episode reached up to 1,92 million with a share of 39,67%. Total reach within the group of 15+ was 4,19 million viewers.

The genre of period drama has proven to be well-received by the audience in the previous years and is considered the most successful on the national market. It needs to be acknowledged that the production of the period drama requires a high budget, which is often not possible in the private sector and outside of Czech Television production. Production of period dramas can be divided into two categories. One category consists of those set in the 19th century or in the period of the First Czechoslovak Republic, such as the three seasons of the series *První republika* (2014, 2017, 2018), *Já, Mattoni* (2016), *Bohéma* (2017), *Četníci z Luhačovic* (2017), miniseries *Rašín* (2018), *Zločiny Velké Prahy* (2021), miniseries *Božena* (2021). Another category consists of the series that are set in the years 1990 – 2000 which was a turbulent period with high potential appeal for the audience. These include *Rédl* (2018) or *Devadesátky* (2022). Other period drama production includes the miniseries *Herec* (2020) set in the 50s, and *Dukla 61* (2018) set in the 60s. The genre of crime series is, as in many other countries, perceived as the one gaining the highest viewership and ratings. Czech Television has produced many crime series, to name the recent ones: *Ultimátum* (2022), *Vražedné stíny* (2022), *Stíny v mlze* (2022), the miniseries *Podezření* (2022), *Boží mlýny* (2021), *Hlava medúzy* (2021), *Místo zločinu Ostrava* (2020), *Poldové a nemluvně* (2020), the miniseries *Stockholmský rofesso* (2020), *Vysoká hra* (2020), *Zrádci* (2020), *Sever* (2019), *Lynč* (2018), *Rapl* (2016-2019), *Labyrint* (2015-2018), and *Život a doba soudce A. K.* (2014-2017).

Czech Television proves to be a competitive producer in the market which is supported by the ability of the institution to follow the trends in the European television market.

<sup>9</sup> ČSFD: The Czech-Slovak Film Database is an online database of films, series and streaming content. The database includes individual profile pages of cast and creators and feature personal biographies, plot summaries, ratings, and fan and critical reviews. ([www.csfd.cz](http://www.csfd.cz))

Furthermore, their production has a given target group, but they still aim to explore new target groups and audiovisual formats. However, the increasing success of recent original production and particularly of the series by Czech Television is based on the facilities of the institution, possibilities in all production stages, including development, realization, and postproduction. The aim of the public broadcasting provider is to abide by the legal obligation by broadcasting informative, educational, cultural as well as entertainment programs (Wierthen et al, 2000, p. 171F), but also to produce quality content that has the potential to succeed in the competitive market. Sczepanik (2021) identifies the re-emergence of a public producer system and a strong role of Czech Television as a producer on the audiovisual market. The following part elaborates on the digital expansion of Czech Television and the company's efforts to rebrand its identity according to the current market structure.

### Public broadcasting service in the digital era

Czech Television has ambitions to appear more competitive in the digital market, which resulted in the introduction of the new video-on-demand service website in late 2021. The aim of the public service broadcaster is to attract younger audiences and to provide content for new audience groups. Even though the portal *iVysílání* was operating as a library of content broadcast on air since 2011, the former purpose of the portal was to provide an archive of content. The portal had technical issues and the streaming was often malfunctioning. However, in recent years, the role of the public service provider has been shifting and, in order to maintain the television medium, European countries are adapting to the current streaming culture. The new version of *iVysílání* tries to achieve the quality of other video-on-demand services on the national market and also provides free online multimedia service similar to public broadcasting in other European countries (e.g., BBC iPlayer, RaiPlay, ARD Mediathek). *iVysílání* can be accessed through the website, on mobile and tablet applications, or on a smart television device.

The visual representation of the platform is designed and branded as other products of Czech Television. The main page presents one of the series with short synopsis and buttons *watch* or *more info*. Below, the main page includes categories such as *New on iVysílání*, *Current news*, *Exclusively on iVysílání* and thematic categories to choose from, such as films, series, documentary, entertainment, for kids, sport and news. The layout includes some features similar to other global platforms. A significant difference is the impossibility to set up one's personal account and create an individual library. Czech Television mentioned the topic of personal accounts as one of the future aims in order to offer more curated content and enable the possibility to rate or review content. Video-on-demand service now offers live broadcasting, content from broadcast, archive of various shows and films.

Furthermore, Czech Television started to produce content exclusively to be streamed on *iVysílání*. Exclusive offer is mainly based on entertainment formats or documentaries which have educational value or discuss social topics. Since its re-launch in December 2021, *iVysílání* has premiered two series to be distributed exclusively on the platform. The

first original production is *TBH: To Be Honest* (2021). The teen series about the world of adolescence and social networks. The format is shorter than usual serial episodes and each episode is 11-17 minutes long. User reviews on ČSFD valued the short format and mentioned the possibility of binge-watching. Others recognize that the project is different from other series in broadcasting and appreciate the topics included in the storyline. TBH has a rating of 7.3/10 on IMDb and 58% on ČSFD. Original production of iVysílání includes talk shows *Protivný sprostý matky* (2022) about motherhood and *Na záhodcích* (2022), which is based on a popular podcast. Both talk shows feature presenters who are not connected with other entertainment shows in Czech TV broadcasting, which is received as refreshing. Original production also includes the educational series *Kritika budoucnosti* (2021) or the documentary *RapStory* (2021).

Example 1 introduced the national public broadcasting service provider Czech Television, whose distinctive feature is its original drama content production. Czech Television makes investments in period dramas, crime series, and documentaries. The public broadcasting service provider is very active in its own digital expansion and data shows the company's focus on appearing more competitive in the contemporary market.

## EXAMPLE 2: COMMERCIAL BROADCASTING AND TV NOVA

The commercial television station TV Nova was the first private nationwide channel in the Czech Republic. Broadcasting began in 1994 and production was focused on entertainment, comedy, and talk shows. TV Nova's contemporary production is characterized by its own original drama series, docudramas, and a variety of reality shows. Currently, the media group TV Nova is broadcasting on eleven channels and one international version of the main channel. The company uses a clear branding strategy and visual of the brand TV Nova. An exception is the streaming platform Voyo, which is connected to the media and entertainment company CME, the owner of the brand TV Nova, acting as an operating leading business in five Central and Eastern European markets. It is important to note that the company Nova possesses one of the biggest shares on the market because of their flagship television news, original fiction, non-fiction productions, and entertainment shows. One of the most watched shows, reaching around 1 million viewers per episode is the soap opera *Ulice* (2005-present). The soap opera is broadcast before the evening news and has maintained these viewership ratings up to now.

The fiction production of TV Nova is oriented on drama and crime series, comedy, and most notably soap operas and medical drama. Another long-running program is *Ordinace v růžové zahradě* (2005-2021; 2021-present), which was broadcast every Tuesday and Thursday in prime time until 2021. In 2021, the show was discontinued in broadcasting and new episodes are now available only on Voyo. Other medical drama productions include spin-off series *Doktoři z Počátků* (2013-2016), *Anatomie života* (2021) or series *Chlap* (2022), which is a remake of the Italian series *DOC – Nelle tue mani* (2020-present). Crime series are often set in a particular region of the Czech Republic to support the interest of the regional audience *Kriminálka Anděl* (2008-2014), *Dáma a král* (2017-2022), *Policie Modrava*

(2011, 2015- present), *Specialisté* (2017-present), *Odznak Vysočina* (2022- present). Family oriented and comedy genre series include *Na vodě* (2016), *Drazí sousedé* (2016-2017), spin-off series *Kameňák* (2019-2021), *Co ste hasiči* (2021) or a recent series *Pan professor* (2021-present), which is a remake of the German series *Der Lehrer* (2009-2021).

The strong side of TV Nova's production are reality television shows and format adaptations. Since the beginning of broadcasting, they have aired many national remakes of foreign game shows, e.g., *Chcete být milionářem?* (Who Wants to Be a Millionaire?) (2000-2005, 2016-2017), *Co na to češi* (Family Feud) (2016-present), *Na lovu* (The Chase) (2021- present). Other reality shows include *Výměna manželek* (Wife Swap) (2005-present), *Superstar* (2009-present), *Masterchef* (2015-present), *Tvoje tvář má známý hlas* (Your Face Sounds Familiar) (2016-present), *Love Island* (2021), *Survivor Česko & Slovensko* (2022), *Lego Masters* (2022-present). Shows containing topics of self-improvement, makeover, or home renovation have also high ratings. Non-fiction production includes docudrama series and scripted reality. One of the current projects is titled *Praha – den & noc*, which is a foreign remake of the German show *Berlin – Tag & Nacht* (2011-present). The show is specific for being partly scripted and for featuring nonprofessional actors who generate spontaneous discussions.

### **Voyo as a competitor on the digital market**

TV Nova acquired the license for Voyo Czech Republic in 2011 and launched the service in 2012. Video-on-demand services first operated for both registered and non-registered users who had the possibility to watch content for free. The portal provided live broadcasting, archive of films and series and access to the broadcasting of sports events. Registered users had the possibility to stream more content, streaming without commercial breaks and to watch premiere episodes in advance. There was an option of pay-per-view or monthly subscription. In 2011, the monthly subscription cost 189 Czech crowns (€7,80) in comparison to 159 Czech crowns (€6,50) per month in 2022. This supports the pricing strategy which made the service appear more exclusive and designated for premium customers. Also, in 2011, Czech video-on-demand market did not offer any global providers or other subscription on demand service. With the expansion of the market, Voyo had to adjust to the prices of other providers in order to be more competitive. In 2012, Voyo launched its own application, which was accessible on smart devices, phones or smart television. At the time, the provider was very progressive with technical support and offerings, above all because of the previous experience of CME in other European markets. To boost the number of Voyo users, in 2014 TV Nova launched another video-on-demand service Nova Plus. The service was introduced to celebrate 20 years of TV Nova on the market and offered all content for free. Nova Plus included a lot of advertising for Voyo, promo banners appeared during the streaming, and users were encouraged to subscribe to Voyo to receive more quality content.

In 2020, Voyo, as a streaming service, underwent technical and branding transformation to create a user-friendly platform with an image of a global platform. Visual representation and layout resemble platforms such as Netflix. The design features

a dark background with titles presented in categories. The main page includes categories such as *recommended titles*, *new releases* or *continue to watch*. A detail view of each title introduces short synopsis, button *watch* and *more info*. User profiles provide options as favorite shows, creating queues with a personal watch list or using a search engine to find content. Each account can be connected to up to five devices, with possible use of two devices at once. The platform features the option of "Parent policy". Voyo policies mention a recommendation engine which is not further specified but acknowledges that the platform assembles user data in order to recommend content. The subscription fee can be paid by card, an SMS payment or with a coupon, which is available at grocery stores or newsstands.

Voyo made a strategic move in 2021, when the company started to invest and further develop exclusive content to be featured only on Voyo. At first, the premiere episodes of the most watched series *Ordinace v růžové zahradě* (2005-2021, TV Nova; 2021-now, Voyo) were discontinued in television broadcasting and were now aired only on Voyo. During its time in television broadcast, the series had a huge fanbase with an average viewership of 800,000 per episode. Furthermore, Voyo started to advertise special episodes of television series and longer episodes of reality shows with premium content. At the time of the re-launch of brand Voyo, television was broadcasting reality shows *Love Island* (2021) with average viewership of 300,000<sup>10</sup> and *Survivor Česko & Slovensko* (2022) with average viewership of 600,000<sup>11</sup>. Many new Voyo subscribers had the need to access the premium content related to these shows.

Brand Voyo originals presents fiction and non-fiction content to be available on the streaming platform only. Production is more oriented to visual quality, quality television content and attractive subjects. The offer includes series based on real stories from Czech society which are generally well-known and the topics can be characterized as having a tabloid character. The crime drama miniseries *Případ Roubal* (2021) was first to be introduced under the brand Voyo Original. The storyline follows a crime case from the 1990s about the investigation of a serial killer. On ČSFD, the series is rated 67%, on IMDb 6.4/10. The user reviews on ČSFD manifest the opinion that the topic had immense potential, yet the execution appears to be fast-paced with no sophisticated dialogues and exploration of characters. The main actor is appraised for his performance and has received a lot of acclaim for the role.

The second Voyo Original drama miniseries was *Guru* (2022). On ČSFD *Guru* is rated 64% and 7.1/10 on IMDb. The user reviews on ČSFD value the ambition of Voyo to produce such quality content and recognize the effort to create superior entertainment. Again, users acknowledge performances of actors and the casting of not well-known actors. The most recent Voyo Original production is the miniseries *Iveta* (2022), which describes the life story of a young Czech girl becoming a famous singer. The miniseries has strong visuals emphasizing the feeling of nostalgia and the atmosphere of the period. The

<sup>10</sup> Figure is based on weekly audience results presented by ATO (Association of Television Organisations), data by Nielsen Atmosphere. Audience results – ATO – Association of Television Organizations. See example of the report: *Ochránce zůstává v neděli na čele s 1,36 mil. diváků* | MediaGuru (viewership *Love Island* 285 000).

<sup>11</sup> See example of the weekly report: *Slunečná v úterý nad úrovní 1,2 milionu, zahájil Survivor* | MediaGuru (viewership *Survivor* 650 000).



storyline features many popular songs in their original version and characters from pop music who have been in the industry up until now. The life of the singer Iveta was in fact very much in the public eye and widely covered by the tabloids, which makes the story even more appealing for the audience. On ČSFD, *Iveta* is rated 63% and 6.8/10 on IMDb. The user reviews on ČSFD appreciate the retro atmosphere and aspiration for the cinematic quality of the visuals. Others criticize the appearance to be excessively stylized and forced. Overall quality is seen in the subject of the miniseries which caught the attention of the media and audiences. Another Voyo Original series is *Národní házená* (2022), a fictional story following a team of amateur handball players.

## CONCLUSION

The aim of this case study was to analyze the hypothesis that the presence of global audiovisual platforms on the market in the Czech Republic has an impact on television production on a national level. Global audiovisual platforms are often perceived as competitors to other digital platforms, yet not to television in its traditional linear form. The hypothesis of the study was based on the recognition that the presence of global video-on-demand services on the market challenges local audiovisual production and impacts the traditional content producers. The production of audiovisual content has opportunities to extend, explore new narrative structures and make use of the digital environment. Global influence brings inspiration from the international audiovisual industry and encourages national and smaller productions to produce more content. The aim to meet the demands of the contemporary viewer, modern society and the younger audience. European public service television possesses a key position in both media and entertainment production, which impacts the media industry within Europe. Similar studies have been conducted to explore the European market, but not in the context of the media market in the Czech Republic. The focus of the paper is to expand research oriented to the Czech media and audiovisual market with an emphasis on national television production in the digital era.

The case study provided an overview of the audiovisual market in the Czech Republic. The aim was to provide a complex analysis of the infrastructure with an emphasis on production and distribution processes, funding, and key actors on the market. The data presented demonstrate that local content production is oriented to the national audience and the presence of global platforms (e.g., Netflix, HBO Max) does not lower the demand for local content. The success of local content is proven by the high national market share and heavy investments in production of television companies. The part dedicated to the video-on-demand services in the Czech Republic discusses both local and international providers. The impact of the global platforms on the market in 2016-2017 when Netflix introduced its services on the territory of the Czech Republic can be recognized.

The case study presented the examples from the Czech national market – the public service provider Czech Television and private TV Nova. Both of them have strong positions on the television market and act as producers and co-producers of local audiovisual

content. Furthermore, both broadcasters have expanded into digital distribution in recent years and produce new content to be premiered on their video-on-demand services. The proposed hypothesis is applicable and apparent in an analysis of their contemporary content production.

The public broadcaster Czech Television, as a producer and provider of the public service, offers a variety of genres and formats. The popularity of crime series has been further supported by the global content production available on the market. The Czech audience appreciates the period drama referring to the past and the heritage of the country, but the format is very expensive to produce, which leads to decrease in its production. In comparison, production of the private television broadcaster TV Nova is oriented to a wide audience with an emphasis on entertainment and the genres such as soap opera, medical drama and reality shows. TV Nova is very active in the expansion of the brand into the digital sphere with subscription video-on-demand service Voyo.

New market infrastructure encourages the increase of competitiveness of local content and the development of television production in terms of introducing digital technology, as an extension of the traditional media.

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# UTJECAJ GLOBALNIH STREAMING PLATFORMI NA TELEVIZIJSKU PROIZVODNJU: STUDIJA SLUČAJA PROIZVODNJE SADRŽAJA U ČEŠKOJ

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**SAŽETAK** *Televizijska industrija suočava se s novim izazovima pri prilagodbi trenutnoj kulturi streaminga te istražuje mogućnosti digitalne distribucije. Globalni streaming servisi percipiraju se kao glavni izvor audiovizualne zabave u različitim zemljama, bez obzira na kulturnu i nacionalnu baštinu gledatelja, pa je stoga konkurencija na tržištu neizmjereno porasla. Ovaj se rad usredotočuje na utjecaj globalnih usluga videa na zahtjev (engl. video on demand, VOD) na audiovizualnu produkciju na nacionalnoj razini. Naglasak je na televizijskoj proizvodnji s obzirom na to da publika sve više prelazi u digitalno okruženje – to se doživljava kao prilika za televiziju da bude konkurentnija, oslanjajući se na svoje jedinstveno znanje o publici na nacionalnoj razini. Studija slučaja pokazuje kako je audiovizualna industrija u Češkoj primjer snažno nacionalno orijentiranog tržišta na čiji razvoj utječe prisutnost globalnih platformi, kao što su Netflix ili HBO Max. Pružajući primjere s češkog tržišta platformi, studija slučaja također ilustrira i širenje lokalnih pružatelja usluga emitiranja u digitalnu sferu.*

## KLJUČNE RIJEČI

PLATFORME, AUDIOVIZUALNI SEKTOR, STREAMING, VIDEO NA ZAHTJEV, ČEŠKA, TELEVIZIJA

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