



Global Markets

Taking Britain to the world

Headline sales £m



Headline profit £m



Record revenue was achieved for the second consecutive year in Global Markets, reflecting a mix of emerging markets growth, production acquisitions, favourable currency movements and new creative partnerships against the backdrop of competitive market conditions.

Global Markets, which encompasses Europe, Asia, Africa, the Middle East and Latin America, saw headline sales of £331.4m (2015/16: £305.7m). Although these predominantly non-English speaking markets cover a diverse range of territories, a common strategic approach yielded notably positive results and profit growth of 61.4% to £42.6m.

Conditions remained mixed with strong demand for high quality titles offset in some areas by pressure on linear channels' revenues. Local digital revenue grew in Asia as the VOD customer base increased. Digital sales were particularly strong in China where *Sherlock S4* on Youku generated over 100m views in three months. Across all territories, demand for our content from global VOD operators was strong.

Emerging markets revenue grew significantly with good content sales in North Asia and Latin America, on the back of strong drama and factual sales and the success of returning series.

In Eurozone markets, business has been good, and included a co-production agreement for 2017's *Blue Planet II* signed with WDR in Germany.

Local versions of British shows performed well in a number of markets, with *Bake Off Italia* breaking viewing records in Italy, and series two of *Bake Off Brasil* becoming the highest rated cookery show on SBT. The South African version also performed strongly.

To further capitalise on our strong formats catalogue we extended our global production network by partnering with Endemol Shine Brazil and securing our first commission with a Brazilian free-to-air, Rede Record, for a local adaptation of *Dancing with the Stars*.

Our established production network also enjoyed success with Tower Productions, our joint venture with All3Media in Germany, moving from 12th to sixth in the country's producer rankings and producing eight franchises locally. In France and India we maintained our strong presence in schedules, producing seven shows plus four documentaries and 12 commissions respectively, while newly established Nordics Productions did well, winning commissions for three shows.

We continued to introduce our global channel brands in targeted markets. A joint venture with Sony Pictures Network saw Sony BBC Earth launch in India. BBC Earth launched in Serbia and Bosnia and CBeebies launched in East Africa, across the Middle East and North Africa and in Taiwan.

Planet Earth II: a worldwide hit

Global Markets territories contributed to the success of *Planet Earth II* with China's Tencent, Germany's ZDF and France Télévisions all becoming co-production partners. *Planet Earth II* content has been viewed more than 210m times in China while the series won its timeslots in Germany, France and the Netherlands.

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Planet Earth II © BBC 2016

Another agreement will see CBeebies make its digital platform debut in China on iQIYI in summer 2017. BBC First's reach more than doubled in the Netherlands, allowing advertising to be launched on the channel. We also launched our first global channel exclusively for cruise ships, BBC HD.

In Latin America, growing demand for our programming enabled us to take the difficult decision to exit linear channels (except BBC World News in region and CBeebies in the US Hispanic market) in order to pursue a sales-focused strategy. This builds on recent success in taking our premium titles to mass audiences via major networks, including *War and Peace* on Globo and *Planet Earth II* and *Top Gear* on Discovery.

Asia led the way in innovation in digital with the creation of our first TVE product, BBC Player, with Starhub TV in Singapore and with Telekom Malaysia Berhad's HyppTV. BBC First also became available in Malaysia, Singapore and Hong Kong on four third-party VOD platforms.

Looking ahead we expect to see continued disruption in the markets in which we operate. Our approach is to forge ever-closer customer relationships, experiment in complementary digital and continue to focus on local audiences.



Dancing Brasil © Blad Meneghel and Edu Moraes/Record TV 2017