

TBI



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Reinventing
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Who's got the
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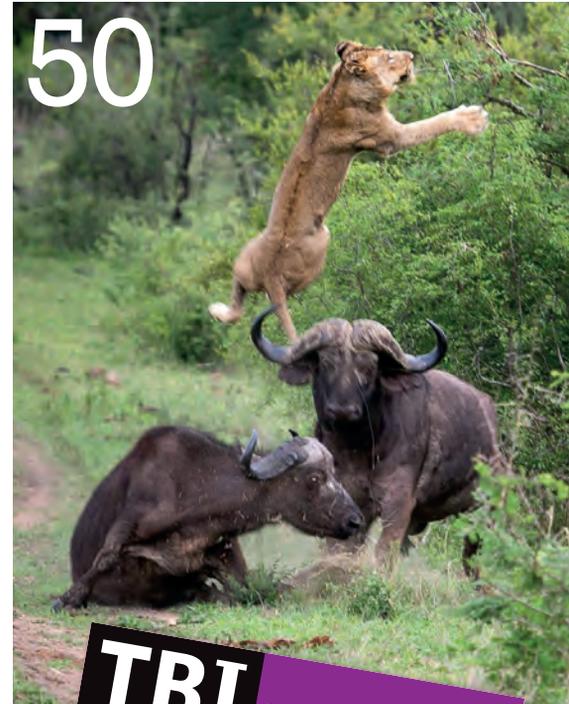
Stephen Poliakoff interview; *The Illegal* from Berlinale; Brazilian drama; Movistar's big scripted move; in-depth looks at *The Collection*, *Roots* and *Section Zero*; and *Victoria* scribe Daisy Goodwin on writing the ITV period drama

TBI Kids

TBI's Kids Survey 2016: the industry view on where the kids business is going and the content that is breaking out; Kids Hot Picks, looking at the very best new shows for MIPTV; and Brazilian kids TV

TBI Formats

A close look at the new *Top Gear* and motoring formats, an in-depth review of survival shows, and the best new formats for MIPTV in Hot Picks





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EDITOR'S NOTE



STEWART CLARKE

The stories regularly moving the dial on TBIvision.com often revolve around Netflix, as has been the case ever since it launched beyond its domestic North American shores. In a typical piece of marketing mastery, the streaming service launched in 130 countries simultaneously earlier this year, to great fanfare.

A few months later, however, and the reality of such a huge rollout is that there are teething problems. These range from local producers lobbying for the US company to pay for local content, to regulators questioning whether some of its shows are too violent or sexual, to the fact that Netflix is simply expensive in some places (whereas it is cheap, compared to pay TV, in the West).

Bruce Tuchman, formerly of AMC and Sundance, digs into the issues in his Viewpoint in this issue, noting the parallels with the Netflix rollout and that of pay TV channels in the 1990s and early 2000s.

Broadcasting veteran Michael Grade also weighs in to the debate in his headline TBI Interview. The former Channel 4 and BBC man pours scorn on the notion, propagated by Netflix and others, that broadcast TV's days are numbered, and draws attention to the fact that the line-up of the streaming services is thin when viewed next to that of most big free TV channels. Netflix, he says, is a nice addition to old-school TV, but not a replacement.

With the merger of Banijay Group and Zodiak Media, Netflix and the other buyers at MIPTV will have one more super-distributor (Zodiak

Rights) to acquire from. The high-level consolidation looks like slowing down this year, in part because most of the major players have made their moves already. With the Hollywood studios more focused on MIPCOM, the likes of Zodiak Rights, Endemol Shine International, ITV Studios, BBC Worldwide and FremantleMedia will be the biggest content owners in town at MIPTV. We check out new shows from them, and other distributors of note, in Kids and Formats Hot Picks, and our Drama In Depth sections.

Elsewhere in the issue we talk to the great and good of the children's TV industry for our TBI Kids Survey 2016. The issue the execs have top-of-mind, it seems, is how to make sense the transition from traditional to on-demand viewing. We also find out what the kids business's favourite kids show is, with a surprising number of votes for one in particular (all is revealed on page 20 of TBI Kids).

Outside of print and online, I have been taking to the studio to record a series of podcasts with our deputy editor, Jesse Whittock, in which we take a look at the latest goings on in the international TV business. Check them out on iTunes or SoundCloud (<https://soundcloud.com/tbipodcast>).

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6 – 10 June

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Shanghai, China

www.stvf.com

21 – 23 June

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Monte Carlo TV Festival

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www.tvfestival.com

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On the move

TBI takes a look at the latest comings and goings in the international television business and reports on who's moving where

FremantleMedia Norway has hired **HEGE SKJERVEN JOHANSEN** as head of development, with the exec coming over from Endemol Shine prodco Rubicon. She has spent the past several years as a producer, but will now focus on new ideas and Fremantle format adaptations



Spain's pubcaster, RTVE, has named the head of its Catalonia division as its overall television director. Eladio Jareño will succeed José Ramón Díez, who resigned from the post on February 25

Cable group A+E Networks has promoted **CHRISTOPHER BARRY** to senior VP and head of finance and business planning, international and digital. The former Sundance Channel executive was most recently SVP, international strategy and digital media, at A+E's global arm



NBCUniversal-backed drama prodco Working Title Television UK has hired former Kudos producer Andrew Woodhead as its new managing director. He fills a role vacated by Juliette Howell, who has created a new prodco with former Film4 chief Tessa Ross

Endemol Shine Group's head of format acquisitions, **ERIK DE WINTER**, is leaving the company to launch a content arm at advertising firm Dentsu Aegis Network. Acquisitions manager Helen Cooper has been promoted to group acquisitions manager and will assume his responsibilities



BBC Studios has hired a comedy chief, who will effectively replace recently departed BBC comedy controller Myfanwy Moore. Chris Sussman has been named head of comedy at the UK pubcaster's new commercial production arm

NANCY COTTON is leaving Fox 21 Television Studios to become US president of new NBCUniversal joint venture prodco Heyday Television. She was senior VP, creative affairs, at 21st Century Fox's Fox 21 TV, which was born from the merger of cable-focused Fox 21 and network producer Fox Television Studios



Vivendi-owned Canal+ has reorganised its executive ranks in an effort to keep better control of costs. This means **Gérald-Brice Viret**, who joined from Lagardere last year will become a director of the French pay TV provider, and Jean-Marc Juramie becomes director of the CanalSat DTH operation

Red Arrow Entertainment Group has promoted its UK chief, **JAMES BAKER**, to president of the wider business. This follows the news that chairman and CEO Jan Frouman has added a newly created role on a new executive board of Red Arrow's parent group, German broadcaster ProSiebenSat.1



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VIEWPOINT



BRUCE TUCHMAN

One-size-fits-all won't work everywhere for Netflix

At CES earlier this year, Netflix was all over the news touting its new-found worldwide ubiquity. “One hundred thirty countries,” the company shouted from the rooftops. In Asia, the streaming service launched in 18 markets simultaneously.

But on the back of all that hoopla came some scepticism and pointed criticism about the company's rigid business model, and the markets the over-the-top service has yet to conquer and – for that matter – will be hard pressed to penetrate or succeed in. In fact, many international media pundits were quick to say that Netflix's push into Asia was unlikely to repeat the company's unprecedented success in the US, Australia and a number of western European markets. The key reasons for that include formidable regional competitors, lack of quality local content and rampant piracy.

What really raised eyebrows was that in new markets such as India and Indonesia, Netflix subscription pricing seemed to be in line with its US service, and that is highly unrealistic for the majority of people in the region. In India, for example, the monthly rate starts at 500 rupees (about US\$7.50) for the basic, non-HD, single-user package. In a market many times less affluent than the US, this pricing is even more expensive than an average local basic cable or satellite subscription. Furthermore, customers in new Netflix markets can pay only by credit and debit card. This puts the service out of reach of hundreds of millions who don't have a credit card, but could pay via other methods.

The announcement of Netflix's global domination strategy, followed by its land grab in

Asia and around the world, reminded me of the not-so-distant past when we were all hustling to secure distribution for linear channels as quickly, and in as many countries and territories, as possible. We started with a one-size-fits-all approach in the early days, and though we might have secured a lot of carriage deals, this didn't typically lead to a sustainable, long-term business model. What we learned along the way is that we needed to be open to different business models, local viewing habits and tastes, and different ways of working with our partners on the ground and with regional governments, to help promote our channels and secure our future.

For Netflix, similar lessons could be applied, especially in Southeast Asia, where regional competitors are offering flexible business and pricing models, compelling local content and even US-sourced programming not available on Netflix. Streaming services like Hooq [a joint venture of SingTel Group, Sony Pictures Television and Warner Bros. Entertainment] and Iflix, which is backed by serious venture-capital players and has MGM as an investor, are making real headway in the region. As of December, Iflix had 1 million sign-ups – just six months after launching in Malaysia, followed by Thailand and the Philippines. This reaffirms that the shift to on-demand media consumption is a global phenomenon, but that to have a successful and lasting business, accessibility and affordability are key.

These regional streaming services are, however, going beyond keeping their services culturally relevant and affordable for consumers. In Iflix's case, they are also allowing users to watch their shows offline with a temporary

download feature, something Netflix doesn't have. Iflix has also broken out of the confines of the direct-to-consumer model, signing distribution agreements with local telcos. Hooq is working with mobile carriers and alternative payment providers to offer customers in India, the Philippines and Thailand with payment options better suited to their lifestyles.

Of course, China is the Holy Grail for Netflix, and is still very much out of reach; Netflix has said it will be launching in China, but this is more easily said than done. Much has been made of censorship being a big barrier, but over the years, content providers have found workable solutions to accommodate these restrictions, which also apply to many other markets.

Perhaps the biggest roadblock is the competition from existing Chinese streaming services, such as LeTV, Sohu and Youku Tudou, which are already reaching hundreds of millions of consumers. They have built effective relations with local regulators, who may in turn be hesitant to add a foreign competitor who has expressed a predisposition towards “going it alone” to the mix. Partnerships are key to building not just trust in China, but also as a hedge against an already competitive pre-existing market for similar services.

As more and more customers come on board, OTT/SVOD players have to be tuned in to the infrastructure, and economic and cultural idiosyncrasies that are indigenous to each region. Especially in the emerging markets, the one-size-fits-all approach defies the essential diversity that billions of people feel as a primary feature of their very identity. Netflix will need to adapt and learn from its forefathers in the cable/satellite industry. If not, there are local services now beginning to take root all over the world, whose knowledge of their customers' needs and tastes, and local governments' policies and restrictions, will ultimately prove to be mightier than the streaming juggernaut of Netflix. May the best, most nimble services thrive. **TBI**

The one-size-fits-all approach defies the essential diversity that billions of people as a primary feature of their very identity



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With no end to the increase in demand for high-end drama, the execs leading scripted TV divisions are coming up with new ways to define programming. TBI sits down with the drama bosses at independent studio Entertainment One to hear about its focus on 'feature TV', 'uber-event TV', and 'must-see TV'

eOne's feature, event and must-see TV

A few months into his role as president, scripted programming, at Entertainment One, former Fox executive Pancho Mansfield was talking 'feature TV' at a London pre-MIPTV preview of the company's drama line-up.

"This refers to major packaging, more often than not from people that used to come from the feature business, and it could be a studio or agency, putting together a script, top talent, a director, a producer and going out and getting a straight-to-series order – that's 'feature TV'," he says.

Not to be outdone in terms of coining terms for drama, eOne Television CEO John Morayniss adds: "'Feature TV' is beyond 'event TV'; it's almost 'uber-event TV'. The demand internationally is for a mix of programming, because there are so many buyers, but what is interesting about 'uber-event TV' is it is must-have. It is priced at a whole different level in the marketplace, and not everyone can afford to be in that business. But those that can, need it.

"The 'feature' part of 'feature TV' is about how the methodology of financing high-end projects is starting to look like that for feature films, which is producers, studios and independents putting together everything, and then taking it out to market."

The drama slate at eOne is looking deep as it focuses on premium fare. It needs to be with three of its staples – *Rookie Blue*, *Haven* and *Hell on Wheels* – reaching the end of their runs on ABC and Global, Syfy and AMC, respectively.

Having shelled out US\$132.6 million to buy *Grey's Anatomy* and *Ray Donovan* studio The Mark Gordon Company (MGC), the first shows are coming through from the prodco, which also makes *Criminal Minds*. *Designated Survivor* is a conspiracy thriller in which 24 star Kiefer Sutherland plays the US president. It has a straight-to-series order from ABC. Legal drama *Conviction* is also in development at The Walt Disney Company-owned US broadcast net.

There is also Frank Spotnitz hostage-negotiator drama *Ransom* for TF1 in France and Shaw in Canada, with eOne producing and distributing. For CTV in Canada there is *Cardinal*, based on the Giles Blunt detective books and starring Billy Campbell (*The Killing*). Sienna Films is producing alongside eOne, which is handling sales.

Continuing eOne's relationship with Jason Priestly post-*Call Me Fitz* is also an old-fashioned procedural, *Private Eyes*. Priestly, the ex-*Beverly Hills 90210* star, plays an ex-pro athlete turned private detective, who teams up with feisty female partner played by Cindy Sampson (from eOne's *Rogue* and *Rookie Blue*).

Amid the mega-budget star vehicles, there are also more indie-minded projects, such as *You Me Her*, a romcom about a polygamous relationship that was at Texas entertainment festival SXSW. It stars Greg Kinnear, lead actor and creator of another eOne series, *Welcome to Sweden*.

"We are an indie studio, and while we will do more feature TV, and



high-budget TV, we are always going to want to do comedies," says Mansfield. "Comedies are niche, unless you are doing a multi-cam show for broadcast, but we can make *You Me Her* at a reasonable price. And although it is a provocative concept, and will not travel everywhere, we are very confident we will make money on it."

The increase in the volume of drama comes as eOne founder and president Darren Throop sells the financial community a very ambitious growth story: he has told investors the company will double in size by 2020. Clearly the scripted division needs to deliver so that the wider company can meet that target.

"The company as a whole will double its business, and part of that will be through the scripted business, but we do not achieve that by simply doubling the number of shows," Morayniss says. "It's not a volume play, but we do want more shows, and more and more we are going after the feature TV-type projects where budgets are significantly higher.

"*You Me Her* is a great example of a small show, but which is still 'must-have TV'," he adds, while noting that shows such as the rumoured *Sharp Objects*, based on a book from Gone Girl author Gillian Flynn, would have a much bigger budget. "In the premium world, you are not getting 22-episode orders; you are getting eight or ten, but the budgets are five-, six-, seven- or ten-million dollars an hour," he says. "We'll increase the number of shows, but ultimately the value of [each feature TV] show is going to go up exponentially."

Whether it is feature TV, uber-event TV or must-see TV, if eOne's premium slate generates some returning international hits, then Morayniss and Mansfield will be making good on their part of Throop's double-up promise. **TBI**



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MGM eyes unscripted's big league

A year ago, MGM's Chris Ottinger told TBI that the studio was going to become a powerhouse in unscripted TV. MGM subsequently took control of Mark Burnett's United Artists Media Group in December, giving the studio a pipeline of reality hits from the US superproducer, and putting the company a lot closer to delivering on that promise.

Roma Khanna exited MGM when it bought the 45% of United Artists it didn't already own, and while Burnett will oversee all aspects of the business, he is expected to focus on production. Ottinger, meanwhile, was promoted to president, worldwide, MGM Television and Digital Group, in the rejig, and has taken on wider responsibilities.

Former CBS and Fox exec Ottinger's plans to make MGM a name to be reckoned with in unscripted by capitalising on the pipeline of content coming through from Burnett.

"We will make a giant push into unscripted and think that is the most important way we can better serve our free-to-air clients," Ottinger says. "The market is turbulent, and it is definitely a challenge for broadcasters to launch new formats, but what we have that the others don't is Mark Burnett. That takes us to the front of the line."



The ambition in formats is to take on the big boys organically, and not through M&A. "The goal in unscripted is to be the number one in IP [creation and ownership]," Ottinger says. "But we're not going to chase a roll-up strategy; that model of rolling up producers is from 15 years ago. It's outdated. Talpa can have a billion-dollar valuation without

owning production companies: its strength is IP, and we will follow that."

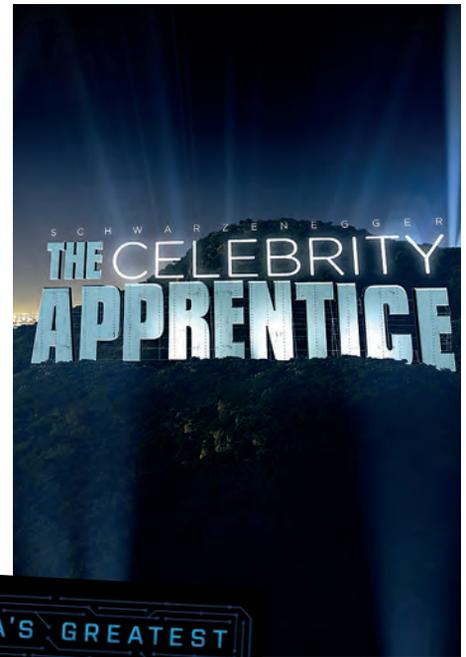
New unscripted offerings for the US that MGM will be bringing to market include new Fox series *Coupled*, which is seen as the spiritual heir to *Temptation Island*. Launching in May on the US broadcast network, it has single, smart young female professionals pairing off with eligible men. Viewers then see if new couple are compatible and can last the course. "It's a modern take on the classic island dating show," Ottinger says.

There is also *America's Greatest Makers* for Turner's TBS, which bows in April. It has a judging panel including Shaquille O'Neal casting an eye over game-changing tech innovations and inventions from 24 teams. Created by Burnett and chip manufacturer Intel, MGM envisages country-specific formats à-la *Britain's Got Talent* and *America's Got Talent*. "It's almost a *Shark Tank* for home engineers, celebrating the country's Thomas Edisons," Ottinger says.

The third show MGM will be pushing at MIPTV is the reboot of *Celebrity Apprentice*, with Arnold Schwarzenegger

in the entrepreneurial hot seat. The star is reportedly keen to do a German version of the show, so MGM is sure to be talking to ProSiebenSat.1, RTL and other German broadcasters about a local format fronted by the *Terminator* actor.

"If the format works with Schwarzenegger, I think we can give it a significant relaunch,"



Ottinger says. "There is a real opportunity to place it [with

buyers] again, and we'd love to get multiple versions on the go."

Ottinger's chief lieutenant, Matt Vassallo, is well seasoned in unscripted, having come to MGM from Shine International (now Endemol Shine International), but Ottinger also wants a new London-based exec to add to the team, as the volume of formats increases.

Ottinger accepts it might take a while before buyers recognise MGM as a formats shop – "We have never in our history been big in unscripted," he says – and, realistically, MIPTV 2017 will be the time to judge whether MGM is delivering on its formats targets and establishing itself alongside the likes of Endemol Shine, FremantleMedia, ITV Studios and Zodiak Rights.

Of course, for a studio with the history of MGM, scripted will always be a huge part of the story. The latest chapter is largely about returning series, with season three of *Fargo*, season five of *Vikings* (which is likely to be 'super-sized' and split into two parts across a longer overall run) and *Teen Wolf*, season six of which is in production. **TBI**



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eOne

TBI: What is the plan for your new prodco, Infinity Creative Media, and, Johnny, why did you choose to invest?

JH: My company, Gate Ventures, has a lot of appetite to invest in the international entertainment space. It's very good for me that I've met up with Michael, who is very experienced in this area.

MG: There is considerable disruption in the traditional model of financing TV production. Infinity is right at the heart of that, because we have found a way of creating internationally appealing content without needing broadcasters' money up front. We have an investors' model, so we can make our shows and then take our time marketing them around the world.

TBI: What has been the initial response?

MG: So far, we've only been going a year and a half. We've done *The Classic Car Show*, which has been sold into the UK to Channel 5 and is being sold by Sony Pictures Television around the world, and *The Wine Show*, which

together on shows that are not just good for China, but also for the rest of the world.

MG: In time, I can see Infinity producing in China. That is a great goal. There's a lot for the Chinese to gain from us exporting skills in producing top-quality television, and there's a lot to be gained by producers taking those skills to China.

TBI: Why did Russ Lindsay, a man best known as a high-profile talent manager, set up Infinity?

MG: He had the idea. Russ was a very brilliant talent agent in a company called James Grant, with big clients like Ant and Dec and Simon Cowell. He got fed up with being an agent after the business was bought by private equity, and as a very entrepreneurial personality had this idea of creating programming without having to go through broadcasters. The energy and skills he has brought to it have really paid off to attract some very triple-A investors, including Gate. He is the driving force behind the business.

Making the Grade

British broadcasting industry legend and Conservative Party life peer **Michael Grade** and Chinese venture capital entrepreneur **Johnny Hon** tell Jesse Whittock about their new approach to programme funding, and offer views on the future of channels, Chinese media, and the impact of on-demand players

sold to ITV. We have a whole pipeline of product, some of it in production and some of it awaiting funding. We have huge interest from broadcasters. It's a new model for financing content for a content-hungry world. You can go mad waiting for broadcasters to make decisions, but Infinity is proving it's possible to make content for the international market without being slaves and supplicants to the existing broadcasters in the first instance. Each show is financed by a set of investors. Some will put money into a whole slate of shows, and some just want to invest in one show or another.

TBI: What is the opportunity in China?

JH: The Chinese market is very hungry for content. There's all this new digital media that people are watching entertainment on – on mobile phones and the internet. They like to see multiple episodes at any one time, so there's a huge hunger and demand for all types of content. China has a big audience that wants good entertainment products, but it lacks the skills to make high-standard content. It has the market and the money, and it needs the innovation and skillset of the West to be able to make quality. We see this as the beginning of how we work

TBI: There is an inherent risk in this model – channels not buying the financed programming. How do you offset that?

MG: You offset it by making good shows and preselling as far as possible. Once you're up and running, people see what you do – the international market takes great comfort if you've sold into your home territory, which we've done with all the stuff we've produced so far. If you don't sell into your home territory, then people ask why. Once we've got some shows up and running, everybody will trust [the model] and beat a path to our door, and that is happening already.

TBI: What genres are you focused on?

MG: We're mainly talking lifestyle. The best way I can describe it is the television equivalent of those wonderful, beautifully-illustrated, high-quality coffee table books. It's about passions and lifestyle.

JH: That is the sort of content that is popular in China and Asia. There are a lot of wealth creators in the region that like the lifestyle side of content, and the Chinese government is encouraging the consumer-led economy. It all works together nicely.



TBI: In the last year, we've reported variously on Chinese investment in Western entertainment companies, in deals such as Dalian Wanda buying Legendary Entertainment. What is happening and why?

JH: The Chinese film industry has 31,000 screens, and many, many cinemas. The box office figure reported in 2015 was around US\$3 billion, and the box office is growing at a rate of 30% a year. Everybody expects it to overtake the US by 2017, so although the Chinese economy is slowing down, the demand for entertainment is growing: a lot of people want to buy content. In specific areas like martial arts, Chinese artists know what they're doing, but they lack creative ideas in other areas such as how one tells a story for an international audience. They need to look outwards to acquire those skills, and a successful partner means good international content.

TBI: When looking at the market in its current state from a Western perspective, what is changing in your eyes?

MG: The one certainty is the demand for good quality content is increasing almost by the hour. You've now got Amazon and Netflix investing millions and millions of dollars in high-end fiction. There's been a slow realisation

that if you want to buy market share, in the end you have to distinguish your service by creating original content for your platform. It has to be distinctive content that you create; it's no good recycling content and expecting to stand out in a crowded marketplace. That means the traditional linear broadcasters, who still have very good businesses, are in deep competition with these new funders, and it's getting more and more competitive. It's a good thing; I don't remember any time in the past 40 years in the business where fiction coming out of America has been so wonderful, and that's had an amazing effect. In Britain we have amazing talent, and we're very well placed to create content.

TBI: What future do you see for broadcasters like the BBC and Channel 4 in the UK?

MG: The one certainty is that the decline of traditional broadcasters will be much slower than the speed new technologies and entrants come into the market. Traditional broadcasters have a good business – it's shrinking, but will go on for many, many years. The article about the end of broadcasting as we know it has been written for the past 20 years, but it never, ever happens. It'll happen one day, when



they can't invest at the level they do now to buy ratings. They all now understand the value of intellectual property in the content: that's a new and very lucrative revenue source for them.

TBI: You've said the proposed privatisation of Channel 4 wouldn't be negative and would create a strong British media group. Can you expand on that?

MG: The Channel 4 model is unique in the world. It has been very successful, but the current model is not fit for purpose. It's an ex-growth business that needs to be freed up. It has a great brand, which is fuelled by its PSB remit, and it has the chance to be a really big, serious, media-and-content company. It will never achieve that under its present constitution. Ownership is a question for government. At the end of the day, broadcasting is very carefully regulated, and whoever gets that licence will have to deliver on the directives it gets from Ofcom.

TBI: You have both mentioned disruption and on-demand platforms. What has been the impact of subscription on-demand platforms on the business?

MG: Let's realise one thing about them: they are not having to fill their internet delivery with five, six or seven hours of new programming seven days a week. They do a few fabulous series, which make a big splash and drive people to their platforms, but there is a lot of things that they don't provide, such as news. The BBC does probably 30 or 40 drama series a year, plus the soap operas. SVOD is an add-on: a wonderful, welcome, exciting add-on to the rich mix of new content available. The public are enjoying it – nobody's a bigger fan of some of these series than me, but this is not high volume. It's the TV living room equivalent of going to the movies – and you don't stop watching the BBC, ITV or Channel 4 because you go the movies.

JH: Content is increasingly being consumed online, and that means a lot of ideas for the future can evolve. You can compare it to e-commerce companies, which are doing so well that it is affecting the traditional retailers. But an online and offline presence is required, so increasingly we're seeing e-commerce companies buying up department stores. That is what happens when disruption comes, and the same will happen in the entertainment industry. It's a good thing because there will be more money in the industry as the demand for content grows.

TBI: Michael, you are chairman of Pinewood Studios, which has launched a high-end drama development business. Will this look to tie-up with Infinity?

MG: They're very separate business models. We are a studio operation with a creative director in Helen Gregory, whose job it is for us to find projects we can invest in and develop, but we're not actually a production company. That's the way that will work. **TBI**





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Superheroic acts

Ahead of another season of fresh US studio dramas, Jesse Whittock investigates the role superhero programming will play as different forms of the genre proliferate on channels and platforms around the world



as a home for DC Comics in the same year, both the film and television worlds have seen an explosion in superhero franchises, programming and character development.

Glossy broadcast network series were soon added to the ever-present animated kids superhero series of the children's TV networks, showcasing an array of superhuman crime fighters and their villainous counterparts. "Arrow was the one that made us all sit up," says Catherine Mackin, director of programme acquisitions at UK channel operator UKTV.

Since The CW show's launch in 2012, superhero programming has been the domain of pay TV giant Sky in Britain. "These stories are all about a crusader righting the wrongs that other people can't," says the European paycaster's director of acquisitions, Sarah Wright, who joined from UKTV the same year Disney bought the Marvel universe's 5,000 (and now 8,000)-strong stable of characters.

"The big hitters of the genre – like *The Flash*, *Supergirl* and *Gotham* – are all solid performers, and the sort of shows that networks like to keep around, as loyal fans mean steady ratings," says Dan Whitehead, head of drama and digital at UK-based programme-trends analyst K7 Media.

"Superhero shows have been working for quite some time for us," adds Sky's Wright. "They are much-loved brands, and that creates a feeling of knowing what you're getting. They are here to stay: look at all of the comics, the fanbases and the conventions."

More recently, a new type of superhero genre has emerged following the original series-output deal Disney and Marvel secured with subscription on-demand service Netflix in November 2013. These shows, which begin with the release of *Marvel's Daredevil* a year ago, take a tone Disney Media Distribution's senior VP and general manager, EMEA, Mark Endemano describes as "more noir-ish and closer to the original graphic novel source material than the network stuff".

"Those shows are given the ability to tell a story that has such high production quality and to really go in-depth into the characters," he adds.

Netflix being an on-demand platform was also a factor in the deal to create *Daredevil*, *Jessica Jones*, *Punisher* and *Iron Fist*, according to K7's Whitehead. "Episodic TV maps closest to the format of monthly comic books, and the SVOD binge-watch mentality has echoes of the trade paperback market, where fans wait for storylines to be collected into a single volume," he says.

"Early every major network in the US has a superhero show," observes one senior European acquisitions executive. Recent broadcast seasons in the US have seen ABC running *Marvel's Agents of S.H.I.E.L.D.* and *Marvel's*

Agent Carter, CBS play *Supergirl*, Fox score with *Gotham*, NBC reboot *Heroes* as *Heroes Reborn* and try and fail with *Constantine*, and DC's *Legends of Tomorrow* join *Arrow* and *The Flash* on The CW.

Since the Walt Disney Company paid US\$4 billion for Marvel Entertainment in 2009 and Time Warner established DC Entertainment

Daredevil, which follows a blind lawyer who becomes a fearless crime fighter, has been praised for its serialised format, plotting, brutal fight scenes and the performance of Vincent D’Onofrio, who plays villain Wilson Fisk.

Jessica Jones, meanwhile, has been among the buzziest dramas of the 2015-16 season. The show has a female lead, played by Krysten Ritter, and besides the standard superhero trope of good-versus-evil, deals with topics such as rape, assault and post-traumatic stress disorder.

Iron Fist- and *Luke Cage*-themed series will follow, before a miniseries involving all four lead characters, *Marvel’s The Defenders*, debuts.

“The Netflix deal with Marvel could set a template for the future – where development deals encompass a package of linked characters, each of which is expected to sustain their own show,” says K7’s Whitehead. “But it remains to be seen how that will pay off.”

He adds: “Certainly *Jessica Jones* trended hard and reviewed well, as did *Daredevil* to a lesser extent, but as with all binge-worthy shows the impact tends to be a big social media splash that vanishes after a few weeks, hence the need to keep launching new series [see graph, page 39].

“Marvel’s character catalogue means the material is there, but it also means more pressure to deliver quality shows.”



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WHO'S YOUR FAVOURITE SUPERHERO?

As Parrot Analytics notes in this exclusive research, it is impossible to shoot an arrow at a TV guide these days without hitting a drama series that's also a comic book adaptation. So how do you compare the success of one superhero show from another? How do they stack up?

US-based Parrot, a media-focused data-science company, might have an answer. The firm has used its patented 'demand expression' and 'demand rating' measurements to gauge appetite for superhero series in ten European countries – Denmark, France, Germany, Italy, Netherlands, Norway, Russia, Spain, Switzerland and the UK – between January 2 and March 2, 2016.

The results make pleasant reading for Warner Bros. Entertainment and DC Comics. *Arrow*, which was the first superhero TV drama to follow Warner's creation of DC Entertainment in 2009, is

the most demanded of its genre in 2016.

The show – from Warner Bros. Television, DC Entertainment, Bonanza Productions and Berlanti Productions for The CW and about a hooded vigilante who operates on the streets of Starling City – had a demand rating of 64.76 (demand ratings can go upwards beyond 100 points, though this would be very unusual).

Arrow narrowly beat out two other DC titles: *Gotham*, which took a 64.40 rating, and *The Flash* (63.76).

Gotham, originally for Fox, follows the life of *Batman* associate Commissioner James Gordon in his younger days as an active officer, and comes from DC, Warner and Bruno Heller's Primson Hill Productions. *The Flash*, another Warner-DC-Bonanza-Berlanti effort and an *Arrow* spin-off, was The CW's second-biggest premiere ever in 2014.

It follows a social-awkward crime scene investigator searching for answers about his mother's murder who develops superhuman speed after being struck by lightning.

All three series feature male heroes and skew relatively young – *Green Arrow / Oliver Queen* begins *Arrow* as a billionaire playboy, *Gotham's* Detective Gordon is a new recruit paired with an older gumshoe, and *The Flash / Barry Grant* is a brilliant but junior Central City assistant police forensic investigator.

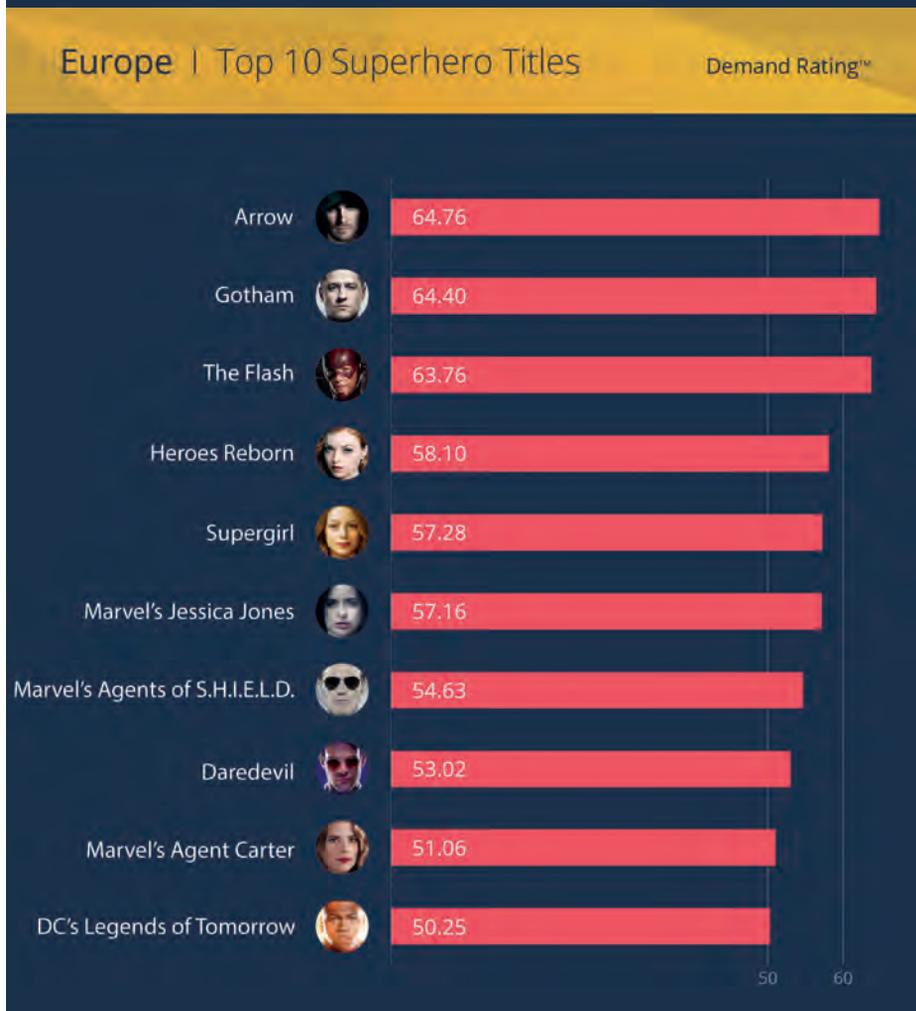
"It's clear from the Parrot survey that all these shows rely heavily on being social-media friendly, in that social media helps to drive awareness among fans and not-yet-fans," says Nick Thomas, leader of digital media practice at UK media research house Ovum. "While this is clearly a huge driver among a core demo of on-demand viewers, it is also encouraged and harnessed well by the distributors and the VOD providers to drive interest."

Sarah Wright, director of acquisitions at pan-European payTV outfit Sky, says the importance of a social strategy around superhero series is "enormous" for broadcasters, but adds: "It's not the only thing we think about, because we think very broadly about our shows, and social only reaches a particular audience".

Sky drives demand for some superhero shows by creating in-house 'fancasts', short-length promotional programmes that highlight when, where and why audiences should tune in. Others attract more of a natural shared family audience, adds Wright.

Parrot's top-10 list was rounded out by the recently cancelled NBC reboot *Heroes Reborn*; CBS new-season effort *Supergirl*; Netflix drama *Marvel's Jessica Jones*; *Marvel's Agents of S.H.I.E.L.D.*, originally for ABC; *Marvel's Daredevil*, another SVOD series; *Marvel's Agent Carter*; and new DC effort *Legends of Tomorrow*.

Source and methodology: Parrot Analytics assessed demand for popular superhero shows through various 'demand expression platforms' including social-media and photo-sharing platforms such as Facebook and Instagram, blogging and microblogging platforms such as Tumblr, wikis and informational sites, peer-to-peer protocols and file-sharing platforms. Parrot's artificial-intelligence systems assess billions of data points to reach the overall demand rating



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FEMALE SUPERHEROES GO TO WAR

A second part of Parrot's exclusive analysis for TBI pits two of television's newest – and toughest – female superheroes, and the universes of DC Comics and Marvel Entertainment, against each other in the UK. In one corner is glossy new CBS broadcast hit *Supergirl* (locally for Sky 1) and in the other, dark Netflix serial *Marvel's Jessica Jones*.

As an overall rating, Parrot found the shows in almost equal demand in Europe (*Supergirl* at 57.28 and *Jessica Jones* at 57.16, see page 38). Further investigation (see graph right) highlights some interesting trends. Launched on November 20, 2015, *Jessica Jones*' demand was well above *Supergirl*'s on January 2, 2016, when the deep-dive analysis began, with almost four million registered demands compared with fewer than two million. Ratings then evened out until the middle of the month, when a second season of *Jessica Jones* was commissioned and demand peaked above six million.

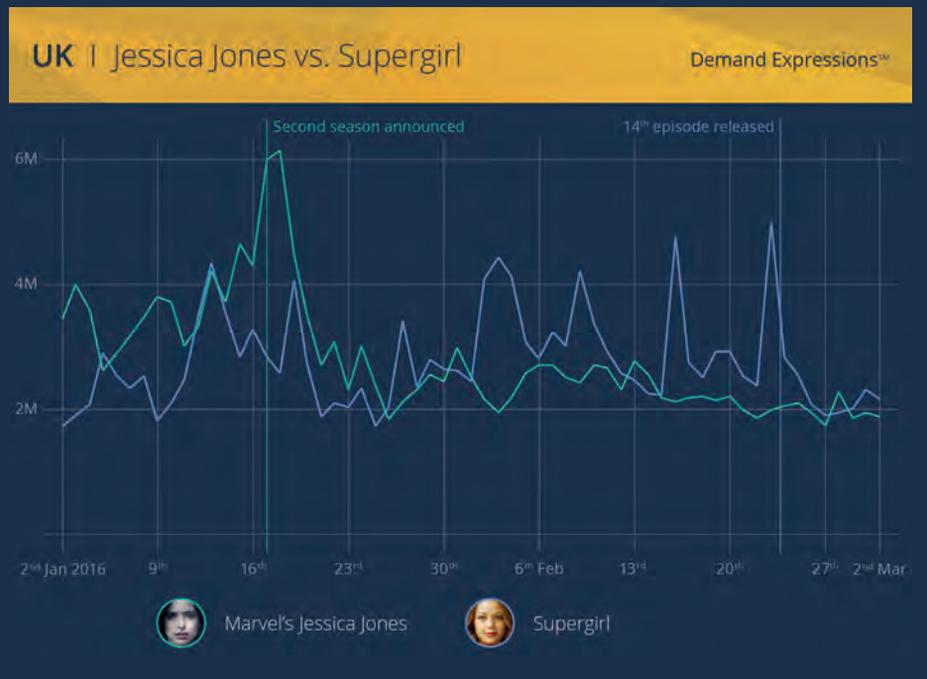
After the excitement died down, *Jessica Jones* fell below two million for the first time, and began to consistently track lower than *Supergirl*, which debuted in the UK on pay TV channel Sky 1 in an 8pm Thursday slot on

October 29 and runs to 20 episodes.

Supergirl has since seen spikes of more than four million around each episode, while *Jessica Jones*, with all 13 episodes released to satisfy binge-hungry Netflix subscribers, seeing

demand plateau in region of two million daily.

Overall, Parrot describes both series, and their superhero leads, as demanding “a high level of demand overall for female-led superhero series in the United Kingdom”.



Sarah Wright – who now oversees acquisitions for Sky's UK and Irish, Italian, and German and Austrian units – says that darker-themed shows can work on linear platforms, too. “*Arrow* isn't always light,” she says. “*The Flash* and *Supergirl* generally are, but *Arrow* can be more uncompromising. You could put darker themes on Sky 1, but the real question is, how much is too much superhero?”

Disney's Endemano says the “concept of superhero has changed” through the Netflix shows, which have a three-year global SVOD window before they can be sold through linear channels, and through darkly-themed films such as DC's *Dark Knight* franchise. “These are darker characters who you grow real emotional attachment for,” he adds. “There is a far more sophisticated TV and film-going audience, and that means the superhero is not just someone in a suit.”

“Are you making something like *The Flash* or *Supergirl*, which both have a sense of fun, or are you selling an *Arrow* or *Daredevil*, darker and



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more violent fare that is unlikely to cross over into the family primetime market?" asks K7's Whitehead. "Marvel and DC have both defined their respective universes on the big screen with very specific and deliberate tonal choices, to which audiences have responded."

Endemano points to the relationship between the Marvel movies and television series, and the thousands of characters that populate the comic books. "The great success of the movies has had a halo effect on television; the ability to bring big stories and play them on television," he says. "One big change has been the production values and CGI bringing that through."

UKTV's Mackin, whose networks play supernatural dramas like *Grimm* to strong ratings, says superhero shows skew relatively young, but notes they are "also massive fan shows. The amazing thing about the genre is people collect them and are willing to follow wherever they go – first on the linear broadcast and then buying the box sets. That's why it's such a revenue spinner for the studios, who can monetise in various ways".

Disney's Endemano also says the revenues of the movies – the original *Avengers Assemble* film went beyond US\$1.5 billion at the box office, while even more niche efforts such as *Ant Man*

are now taking more than US\$500 million worldwide – suggest superheroes are now going much broader. "There are only so many 15-year-old boys in the world, so that shows there are other demographics watching," he says.

Ovum's leader of digital media practice, Nick Thomas, says those Marvel audiences are growing because of the "execution" of the franchises. "The way the content has been created, distributed and marketed has been key to that sustained success," he says.

This, combined with the idea that superhero shows do well in periods where culture is having an identity crisis, and that the franchises rather than individual stars "guarantee success", are relevant to the recent narrative, says Thomas.

"Younger fans don't care about stars in the way that fans used to," he adds. "A survey last year demonstrated young audiences prefer YouTubers to the stars Hollywood movies promote.

"But fans do care about franchises, and it's a safer bet: given that most movies are expensive prototypes that lose money, it make sense to exploit an existing brand that already has a fanbase across different formats and platforms, where audiences know what to expect. Even if they don't follow a particular superhero, they understand the genre."

Marvel and DC have dominated television's superhero story since 2009, and other attempts to barge in on the space have produced mixed results. NBC's *Heroes* revival ran between September 2015 and January 2016 to middling ratings and was not renewed, while *Powers* made a buzz in the industry in 2014 as the first original series for PlayStation Network, the content platform of the PlayStation video games consoles.

The ten-episode *Powers* is based on comics set in a violent world in which a pair of homicide detective investigate people with god-like abilities, with PlayStation stablemate Sony Pictures Television distributing. A second season was commissioned in May last year, and it has now sold into the UK to Viacom's digital free-to-air network Spike.

Starz is now lining up *American Gods*, a superhero-style drama from Bryan Fuller and writer Neil Gaiman (*Heroes* producer Michael Green is also an auspice). Fuller has said he wants to create "a Marvel Universe not with superheroes, but with gods", and distributor FremantleMedia will debut it later this year ahead of its US release in 2017.

Meanwhile, the studios continue to develop new IP based on their universe, albeit in new formats for the new broadcast season.

ABC has given Marvel Television put pilot commitment on *Damage Control*, a half-hour comedy from *Daily Show* executive producer Ben Karlin that's based on Marvel comics about a crew that specialises in the clean-up of superhero conflicts. NBC is lining up a half-hour pilot, *Powerless*, which comes from Warner Bros. and DC. Based on DC Comics characters, the workplace comedy is set in a miserable insurance company that exists within the DC universe. Warner pulled off a coup by signing Vanessa Hudgens as its lead.

Meanwhile, cable channel FX has handed *Downton Abbey's* Dan Stevens the lead in *Legion*, which comes from Marvel Television and FX Productions and is set within the *X-Men* universe.

So, as we look ahead, why the change of direction, considering ratings of dramatic superhero titles remain strong (*Legends of Tomorrow* took 572,000 for Sky 1 on debut, for example)? Disney's Endemano has an answer: "Wherever there's success, people want to emulate that success. We have literally thousands of characters with interconnecting stories in the Marvel Universe. Ultimately it will always be about the stories – and then it comes back to the breadth and depth." **TBI**

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Buyers Briefing

Commissioners and content-buying executives representing French pay and free TV channels, SVOD platforms and kids networks tell Pascale Paoli-Lebailly about their schedules, their original programming strategies and acquisitions needs

Name: Laurence Blavoet
Title: director of programming, Canal+ kids and family



Canal+'s kids and family division comprises pay TV net Canal+ Family, as well as kids channels Télétoon+, which targets the 7-11 demo, and preschool platform Piwi+. Both kids nets are investing in premium and exclusive content

TBI: What is unique about the Télétoon+ and Piwi+ channels, and what should distributors know in advance?

Our objective for both channels is to have unique and aspirational strategic positioning with a strong cultural footprint. This means programmes that place children right in the middle, which contain references to their daily life, and that are anchored in reality. We're also looking for more exclusive rights, more new franchises and more digital projects.

TBI: Who are the key buyers within your team?

Géraldine Soto, our head of acquisitions, works with David Bessières, acquisitions executive for the world outside Europe, and Chrystel Poncet, who oversees Europe.

TBI: What are the key slots for your channels, and why?

Our key slots are the early morning between 7am and 8.15am, which is before school begins, then at around noon, from 11.45 am till 1.15pm for lunchtime. Our afterschool slots start at 4.15pm and end at 7pm.

TBI: What is the model for acquiring and producing content?

As we need to be unique and different from our competition, we mostly prebuy or coproduce, mainly in France. The programmes we buy must largely be exclusive, although we share franchises with the terrestrial channels. Fifty per cent is first- or second-window French programming, which is mostly prebought or coproduced.

TBI: What are you really looking for at the moment?

Right now, we're looking for live-action series: spooky, mystery and supernatural programmes for the 8-12 demographic.

TBI: What is the breakdown of animation, live-action and other genres?

On Piwi+, animation represents 90% of our schedule, while 7%

is children-focused formats and 3% is live-action. On Télétoon, the animation fare decreases to 75%, with 20% gameshows and 5% live-action programmes.

TBI: Is new live-action series *Nowhere Boys* an example of what you're currently looking for? How does the show, which was originally for ABC3 in Australia, perform on Télétoon+? Does it bring in a new audience?

Yes, definitely. It is really what we're looking for to build our audience. We are looking for programmes that have the same production values as the series that kids could see in primetime with their parents. We don't have the ratings just yet, but what we know is that the replay data is very good.

TBI: Which of the programming markets do you find the most productive?

MIPJunior, Kidscreen and MIPTV, but also Cartoon Forum, where we can discover new programmes, and sometimes, new producers.

TBI: What is the single most successful acquired show across your channels?

Angelo Rules, a prebuy from TeamTo, the third season of which will be launched soon.

TBI: What acquired shows will you launch in the next few weeks/months?

Peanuts from Normaal, One Animation's *The Insectibles*, Sixteen South's *Lily's Driftwood Bay* and season three of *Peter Rabbit*.

TBI: What types of on-demand rights do you require?

We first require catch-up and TV rights. To promote shows through the internet, a few episodes are carried on a free VOD basis.

We take SVOD rights for promotion on our Piwi+ and Télétoon+ YouTube channels, Dailymotion and our websites. A few episodes may also run on our Piwi+ app, while linear programming can be replayed on our catch-up service.

TBI: What sorts of windows are you buying for?

Exclusive pay TV rights, and first or second windows after the free channels.

TBI: What is the key challenge facing buyers in today's market?

In pay television, it is quite difficult to keep strong [programme] brands exclusive. Sooner or later the brands' licensors want to get free TV exposure for their toys and games.

Name: Guillaume Jouhet
Title: managing director, OCS Channels



OCS Cinéma Séries, the pay TV offering from French telco Orange, comprises five channels. These are family-skewed OCS Max; US content-focused OCS City, which has HBO content; drama and horror net OCS Choc; classic movies channel OCS Géants; and on-demand offering OCS GO. Carried on most French platforms, the bouquet had 2.4 million subs as of last October

TBI: What is unique about the OCS channels, and what do distributors need to know?

OCS premium channels have a special positioning that's 100% focused on cinema and series. It offers a hybrid of on-air and on-demand programming.

TBI: Should producers and distributors be seeking out acquisitions people at each channel, or is buying handled centrally? Who are the key buyers?

Acquisitions are handled centrally by Alix Goldsmith and her team, and prebuys are handled by Boris Duchesnay.

TBI: What are the key slots for your channels?

For drama series, our 'Hot from the US' and 'US+24' slots, mostly on Mondays, are key blocks. We also have a blockbusters slot on Wednesdays.

TBI: What deals do you have with the US studios?

We have secured multiyear, premium output deals with Sony Pictures Television for movies and series and with HBO for drama and comedy. The SPT deal allows us to exclusively broadcast movies such as *Elysium*, *White House Down* and *Equalizer* and blockbusters such as *The Walk* from Robert Zemeckis. Series such as *Transparent* and *Mozart in the Jungle* have gone out on our US+24 slot. *Powers*, the first Playstation Originals title, also launched in March 2015. Our HBO series include *Vinyl*, *Game of Thrones* (pictured), *The Knick* and *Olive Kitteridge*.

What is the mix of European and French content?

French regulation means we have to offer 60% of European-produced content, of which 40% must be French. We meet our obligations with movies, French TV series like *France Kbek* from LoveMyTV, in-house shows and youth programming.

TBI: What is the model for acquiring content? What rights do you need?

For television series, we mostly acquire premium US hour- and half-hour series. As far as movies are concerned, we acquire both premium and library titles to create a rich thematic programming offer.

TBI: What are you looking for at the moment? Is there a genre or specific type of programme you have on your shopping list?

With our four channels dedicated to movies and series, our programming covers a wide range of genres, from blockbusters to indie films and children's programming. We're looking for high-quality movies, pay TV series – hours or half hours – and documentaries about cinema.

TBI: Which of the programming markets do you find the most productive?

The MIPs and the Toronto International Film Festival, which is the best place and time of the year to get the most extensive view of the movies about to be on the market in the coming year.

TBI: What are the most successful acquired shows on your channels?

Game of Thrones and *The Walking Dead* are both the biggest pay TV successes worldwide and on OCS, gathering very committed followings, who are there in significant numbers at 4am when we simulcast with the US. Season six of *GOT* is set to launch simultaneously with the US on April 24 on OCS City and OCS Go, and on a US+24 basis, too.

TBI: What acquired shows are you about to launch?

The Girlfriend Experience from Starz will start April 11 in our US+24 slot, and we are launching the next season of *GOT*.

TBI: What types of on-demand rights do you require?

We aim to secure the catch-up rights that are linked to linear rights.

TBI: What sorts of windows are you buying for?

We buy for the first pay TV window.

TBI: What is the key challenge facing buyers in today's market?

Global players taking worldwide rights.





Name: Guénaëlle Troly
Title: deputy managing director,
 RMC Découverte

RMC Découverte, part of the NextRadioTV group recently bought by Altice, launched on the free DTT market in December 2012. Last February, its audience share reached 1.6%, up from 1.2% a year earlier. Aimed at men under 50, the focus is unscripted programming

TBI: What is unique about RMC Découverte, and what do distributors need to know?

We started the channel with the idea of bringing something different to the French TV landscape, and targeting young men with programmes focused on history and investigation, technology and adventure, and travel and discovery.

TBI: How is it positioned compared with other doc channels in France?

We are trying to raise viewer interest with themes such as cars and the automotive sector.

We were the first channel to commission a local version of UK format *Top Gear*, which BBC Worldwide France produces. We also regularly offer special event programmes in history and science, and we're very open-minded about integrating new genres.

TBI: When do you tend to commission or acquire?

The MIPTV and MIPCOM periods are very hectic, but we buy content all year long. We like to seize all opportunities and make rapid decisions.

TBI: Who are the key buyers within your team?

Corentin Glutron is the executive for all acquisitions, while Rodolphe Guignard handles copros and prebuys.

TBI: What are the key slots for your channels?

Primetime evenings are our key slots as they keep viewers loyal, with, for instance, the *Top Gear* evening on Wednesdays. Our Saturday and Sunday slots are dedicated to factual series, with shows about extreme jobs and building formats. Fridays are oriented towards history and world wars, and we recently launched a car restoration slot on Mondays.

Access prime is very competitive in France, and the channel performs quite well, with transactional and auction formats such as *Storage Wars*.

TBI: How do quotas affect your schedule?

We must broadcast 60% European content, and that includes 40% French programming. We are also obliged to invest 20% of our revenues in European and French independent production. As such, we work closely with European producers and broadcasters such as Euromedia, Zig Zag and ZDF.

TBI: What is the model for acquiring content?

Acquisitions represent 75% of our programming grid, but the volume of coproduced or prebought programmes is growing. Last year, we produced 250 hours. The rights we require vary depending on the projects. We often buy TV and catch-up rights, adding options on non-linear VOD and SVOD rights. NextRadio TV owns the on-demand documentary platform Vodeo, for which we buy around 200 hours a year.

TBI: What is your most successful acquired show or format?

Top Gear. The French version is broadcast every Wednesday in primetime before the UK and US versions, and it is a key initiative for us. Season two reached a consolidated audience of 757,000 viewers, which is 25,000 more than for season one. Catch-up TV added an additional 17% viewership, half of whom were men aged 25-49. Other successful acquisitions include *Storage Wars*, *Building Wild* – which brought more women to the channel – and *Wheeler Dealers*.

TBI: What acquired shows will you launch in the next few weeks/months?

Upcoming shows include Animal Planet's *Ice Cold Gold*, which is set for May in primetime on Sundays, and the new BBC Two *Top Gear* show with Matt LeBlanc.

TBI: What are you really looking for at the moment?

We always looking for technology shows that explain how things work or what they are made of, because we do not have many on this subject. We're also looking for one-off history documentaries linked to special events and anniversaries, such as the World War II battle Operation Overlord next June.

TBI: Have you any output deals ?

We have agreements with international producers such as the BBC, National Geographic and Discovery Channel, but we work with all factual programming distributors such as Fox, Passion Distribution, TCB Media Rights and FremantleMedia.

TBI: Which of the programming markets do you find the most productive?

MIPTV and MIPDoc are important to us, as all the distributors come over, but we also attend events such as the BBC Worldwide Showcase and the German Screenings.



Name: Alexandre Michelin
Title: managing director,
 Spicee



Spicee is a new online TV current affairs and documentary platform, and mobile app. It was launched by ex-Havas production chief Antoine Robin, former senior M6 executive Jean-Bernard Schmidt and digital entrepreneur Bruno Vanryb in June 2015. Former Canal+ exec Alexandre Michelin recently joined as managing director

TBI: What is unique about Spicee, and what do distributors and producers need to know?

Spicee almost exclusively features international documentaries on ambitious subjects that include police brutality in the US (*Pas de Tirs à Blanc Pour les Noirs*) and Australian immigrant torture (*Immigration en Australie: Les Camps de la Honte*). We are positioned to give international web documentaries ‘the French touch’. We are a French- and English-language website covering 35 territories and will soon be translated into Spanish. We are an international media platform, as 90% of the subject matter focuses on international issues.

TBI: Do you draw inspiration from youth brand Vice?

No. Our business model is a subscription-based one, based on exclusive original content for our OTT platform and app. Spicee is a platform that adapts to your way of life; whether you have five minutes or one hour free, it fits to your needs and habits. All our videos are segmented by duration: five-, 15- and 30-minute programmes, for example, so that you can watch long documentaries at your own pace or easily identify short video reports.

TBI: Why choose a subscription VOD model?

As we believe that serious journalism is extremely valuable, Spicee is a subscription media platform [costing €9.90 / US\$10.99 per month] also offering single purchases (€2.50). We wanted to create a truly open and innovative digital media platform, without the limitations of free TV. We are free to report on current affairs and to cast light on new journalistic and long-form-storytelling talents.

TBI: How many titles do you offer, and what is the single most successful show across your platform?

We currently offer 70 hours of exclusive video content and produce three hours of new weekly documentaries or short videos. The most popular video on the website is a 57-minute investigative documentary about a jihadist faction in Syria titled *Les Escadrons du Jihad* (Jihad Squadrons) by Farouk Atig and Yacine Benrabia.

TBI: How do you organise the content?

We are building four content verticals: stories about unusual characters, inspiring stories and incredible lives; lifestyle shows that

reveal what fashion, art and cooking say about the world; investigations and analyses on major international themes; and ‘Select’, which is a selection of the best documentaries and investigations over the last few years. Such curation often casts an interesting light on today’s news.

What are you looking for at the moment?

We are looking for extraordinary women’s stories, as we feel we have to shed light on remarkable women who often remain unnoticed. This conviction is now central to many of our documentaries. As such, we produced *Ring My Belle*, a story of a woman boxer who fought for more than ten years to represent her country at the Olympics. For the documentary *A Cab to Mazar* (pictured) we installed GoPro cameras in the vehicle of the first and only woman to drive a taxi in Afghanistan and followed her everyday life.

TBI: What is the percentage of in-house content and acquisitions?

90% is in-house content that we commission from independent reporters or companies, and 10% is acquisitions.

TBI: Do you have any content partnership deals?

We have secured a partnership with the Babel Press agency, first because we share the same editorial values, and second because it provides us with access to exclusive investigative video reports. Spicee also has access to Babel’s large network of 80 journalists and five bureaux in New Delhi, Rio, Miami, Islamabad and Shanghai.

TBI: Are you distributing your content?

We are selling content abroad, and to many public service broadcast groups. ZDF, RTBF, TSR and CBC have all already acquired our content. We are selling to international news channels, too, as our programmes cover an extensive range of current affairs.

TBI: When are the key times during the year you commission or acquire?

We don’t have specific key times, as we are producing and creating constantly.

TBI: Who are the key buyers within your team?

Jean-Bernard Schmidt and Matthieu Firmin. **TBI**



TAKING CARE OF BUYERS AT OUR BIGGER STAND R8.D3



MONKEY LIFE

8 series 154x30 Primate Planet Productions

Monkey World, the largest monkey and ape rescue centre in the world with a dedicated team to help create a safe haven for rescued primates.



THE SOMME: THE FIRST 24 HOURS

1x60 Like a Shot Entertainment

Host Tony Robinson tells the story of the real, ordinary men who fought in one of the bloodiest battles of World War I.



THE PUSHER

1x60 Britespark Films/Argonon International

Over 60 bodies have been found in Manchester's canals over six years. We set out to establish the truth behind the rumours pointing to a probable active serial killer.



BEAVER LAS VEGAS

1x60 Middlechild Productions

Nature has provided an unlikely solution to curing the 15 year water shortage in Las Vegas. Here, we find out how beavers could save the city in the desert.



MURDER MADE ME FAMOUS

2 series 13x60 AMS Pictures

These infamous killers gained public notoriety when their crimes whipped up a media frenzy. But why do certain killers capture the attention of millions?



DEFINITIVE GUIDES

2x60 Arrow Media

EXTREME SEA MONSTERS and NEW MYSTERIES OF THE BERMUDA TRIANGLE



THE BIG WARD

10x30 Greenstone

Six individuals are forced to change their habits, but will they have the strength and determination to reach their goal?



COPYCAT KILLERS

13x60 Story House Productions

Hollywood made them do it... This new series chronicles the real-life copycat crimes and criminals inspired by blockbuster movies and TV series.



THE PRIVATE LIVES OF THE TUDORS

3x60 Like a Shot Entertainment

An intimate look at the lives, loves and scandals of one of the most celebrated royal dynasties – the Tudors – that brings their private lives to life.



MONEY FOR NOTHING

2 series 40x60 Friel Kean Films

Vintage designer and writer, Sarah Moore transforms unwanted items into valuable, bespoke pieces for a profit, a heartwarming surprise for the original owners!



KITTEN IMPOSSIBLE

1x60 Middlechild Productions

A collection of cats performing the impossible! Meet some of the world's most intelligent, skilful and brave felines whose stories have gone viral.



INSIDE SECRET SOCIETIES

6x60 Like a Shot Entertainment

A history series that explores some of the most secretive and dangerous global underworld societies and their counter-culture dogmas.



THE CRUISE

6x30/3x60 Wild Pictures

Come aboard one of the largest luxury cruise liners and meet its colourful characters! We join the passengers and crew following the ups and downs of life afloat.



DUMPED: REVENGE EXTREMES

1x60 Title Role Productions

These are the stories of some of the world's most infuriated jilted lovers – the ex's who decide that their other halves aren't getting a penny!

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Trans on TV



I Am Cait

When cultural historians look back, 2015/16 will undoubtedly be seen as a landmark in terms of the way transgender people are portrayed on TV and viewed by mainstream society, reports Andy Fry

Reality TV star Bruce Jenner's transition to Caitlyn Jenner is undoubtedly the most high-profile transgender story, having been introduced on US network ABC's news magazine *20/20* in April 2015 and then explored further in E! Entertainment's eight-part reality series *I Am Cait* (now recommissioned). The subject has also been addressed in numerous other shows. Among scripted series, standout examples include *Transparent*, *Orange is the New Black*, *Grey's Anatomy*, *The Fosters* and *Boy Meets Girl*. In unscripted, there has been a steady stream of character-based films that study the issue from a range of angles. Not to be overlooked is the contribution from feature films, with Eddie Redmayne's performance in *The Danish Girl* and Sean Baker's micro-budget movie about trans sex workers, *Tangerine*, also stirring debate.

Jes Wilkins, chief creative office at indie producer Firecracker Films, believes the positive portrayal of transgender people has

been "one of the most incredible stories of the last couple of years, and the TV business has been directly involved".

"The way the industry has tackled preconceptions about the transgender community and the discrimination it faces has arguably helped drive the biggest and fastest change in social attitudes ever," he says.

Firecracker's engagement with the issue came when it was commissioned to make a series of three films for UK broadcaster Channel 4 UK's 'Born in the Wrong Body Season', entitled *Girls to Men*, *My Transgender Kid* and *My Transgender Summer Camp*. "I think that before the current wave of shows the community was very misunderstood, and there was a kind of freak-show element to the way it was depicted," Wilkins says. "But that has definitely changed. I remember escorting one of the families from *Girls To Men* to an interview on a leading daytime chat show in the UK and thinking 'it doesn't get much more mainstream than this'."

Wilkins doesn't attribute the entire change

in attitudes to TV, also pointing to the role of social media "in helping trans people find support from each other", adding: "The fact that they could share experiences has helped the movement gain momentum."

"One of our characters in *Girls to Men* posted the story of his transition on BuzzFeed and it was watched 4.5 million times in two days," says Wilkins. "It was an extraordinary thing to be part of that expression of interest."

The interaction between internet and TV is also evident in the case of Jazz Jennings, a transgender teenager who has established herself as both a YouTube personality and a reality TV star, fronting the TLC show *I Am Jazz*. Critics have responded favourably to the show (also recently recommissioned), arguing that it has approached the subject with more sensitivity than you might expect from the channel that brought the world *Dance Moms*.

Zodiak Rights CEO Tim Mutimer says his company's programme catalogue has a number of shows that tackle transgender themes. These include *Sam and Evan: Girls*

to *Men, My Dad is Pregnant* and *Sex Change Soldier*. The latter, says Mutimer, “told the compelling story of Captain Hamilton, a paratrooper who turned notions of manhood and machismo on their head when he became the first officer and the first paratrooper in the history of the British Armed Forces to undergo a sex-change operation”.

At MIPTV, Zodiak will have new properties. “We’ll be launching *Miss Transgender UK*, from Minnow Films for BBC Three, which follows contestants battling it out to be crowned the UK’s first Miss Transgender,” says Mutimer. “This show is about people who are fed up with living in the shadows and determined to take centre stage. It follows three contestants on extraordinary personal journeys, exploring what it’s like to be young and transgender.”

Also from Minnow is *Sex Diaries – Trans Lovers*, which is part of a 3x60mins series, for Channel 4, called *Sex Diaries*. “Within this episode, BAFTA and Emmy award winner Charlie Russell meets men who have fallen in love with male-to-female transsexuals. It’s an intimate study that explores the transgender

relationships, and the ramifications for the couples, families and friends.”

Like Wilkins, Mutimer argues that “the focus and tone of transgender-based programming is now much less about provoking shock, but more about helping inquisitive viewers learn and understand the real issues that transgender people face”.

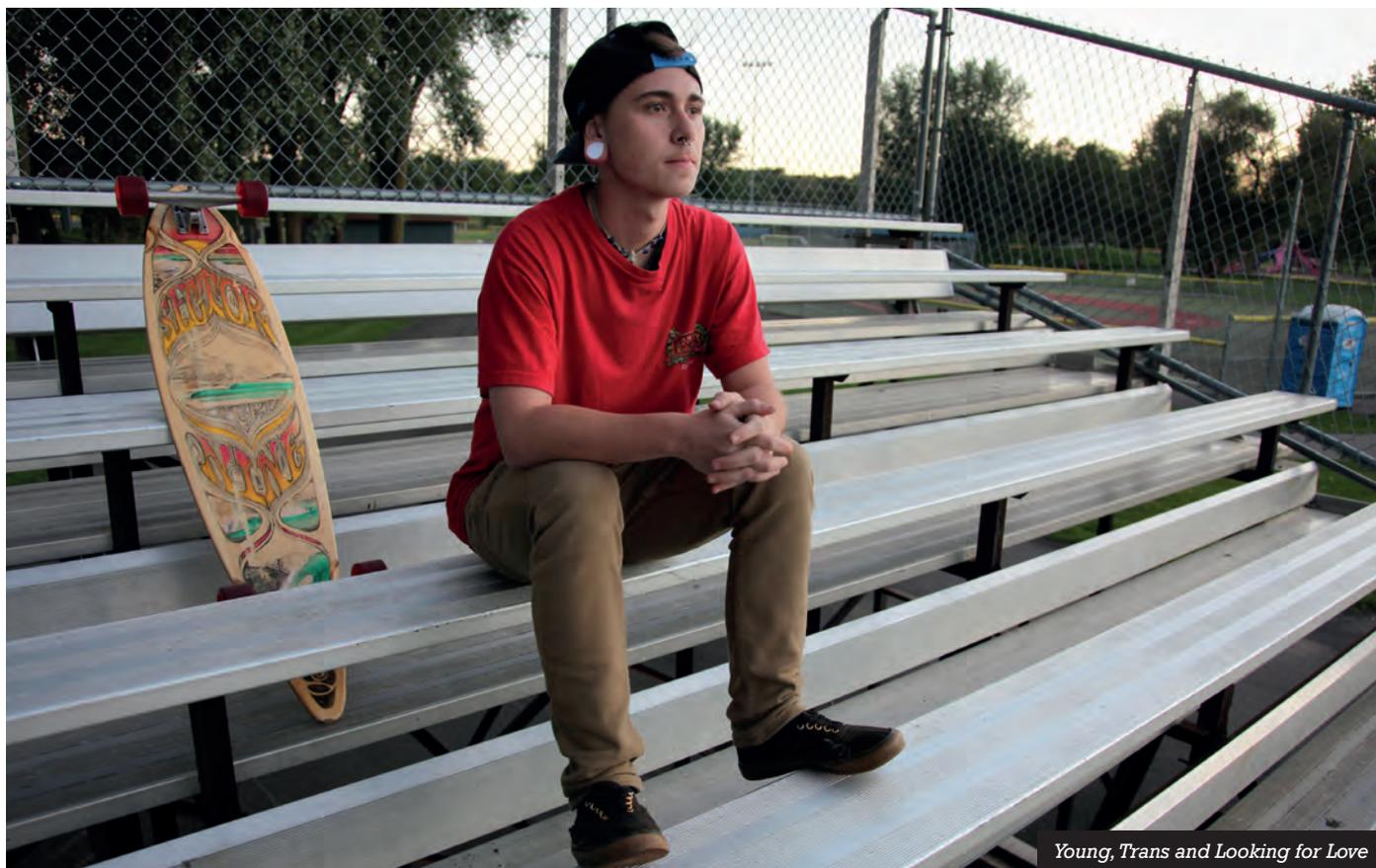
In terms of the sales potential of such shows, Mutimer says *Sex Diaries* has sold into New Zealand, the Netherlands, Israel, Finland, Denmark, Australia and Poland, “and the episode ‘*Trans Lovers*’ proved how topical transgender programming is, as it received the most UK press attention in the three-part series. Originally, the more culturally open and



I Am Jazz



Transparent



Young, Trans and Looking for Love



Orange is the New Black

tolerant territories were the only ones where broadcasters were taking transgender shows, but now we find that the market is opening up as interest is growing on the subject”.

Beyond Distribution general manager Michael Murphy has also divined a new seriousness in the way the subject is tackled.

“We picked up a film from Mad Hive Media called *Transforming Gender* that first aired on CBC in Canada,” he says. “That was about the struggle the community faces and addressed some difficult issues, such as the fact that 40% have attempted suicide at some time.”

Murphy says his company picked up the

show because “we saw this as a serious, topical issue – not reality TV. It’s the first great civil rights struggle of the 21st century. What we liked was the way the film was based around transgender people telling their stories in their own voices – it was a very honest, insightful account. It also has the kind of quality that will keep it relevant for years”.

In terms of sales, Murphy tells a similar story to Mutimer, which is that “there is interest from a growing number of countries. I think we have to accept that certain territories won’t go near subjects around sexual identity, but we licensed this film to Discovery Networks Latin America, Sky Italia, Spiegel TV in Germany, DR in Denmark, SBS Discovery in Finland, Multicanal Iberia and Radio TV in Hong Kong.”

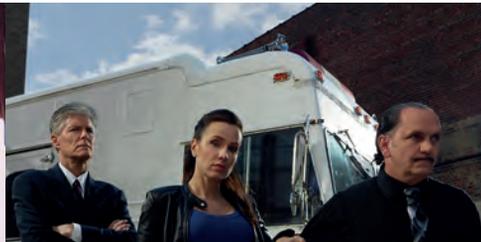
Others to have taken the transgender agenda to heart include Sky Vision, which distributes Peacock Alley Entertainment’s *Brave New Girls*, a show follows the life of a transgender beauty queen; and Swedish public broadcaster SVT, whose commercial arm, SVT International, has a couple of moving and insightful films on its slate, according to head of business development Paulette Rosas Hott.



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NILS HOLGERSSON

READY FOR TAKE-OFF

PREVIEW AT MIPTV 2016 R7.C1

STUDIO100 MEDIA

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In one, *Becoming Ann-Christine*, the story focuses on a 57-year-old male priest who makes the brave decision to become a woman, having been trapped in the wrong body all her life. In another, *Just a Normal Person*, the subject is a female twin, Sam, who transitions to a man after making the same realisation at a young age. “It’s a sensitively-produced film about everyone’s right to be who they really are,” says Rosas Hott.

The fact that films like *Girls to Men* and *Just a Normal Person* tackle female-to-male transition is an important point in itself. The TV business has tended to focus on exotic, sexualised images of transgender girls, whereas the new wave of shows is taking a more thoughtful look at the issue. “If you asked me which areas need more attention, then I’d say female-to-male transition is one of them,” says Ray Bradford, director of entertainment media at GLAAD, an organisation that monitors and advises the US industry on the way it portrays and represents the LGBT community. “For years they’ve been mostly invisible. That said, I’m pleased to say MTV’s *Faking* is about to introduce a transgender male played by a transgender actor [Elliot Fletcher].”

Ceire Clark, senior acquisitions executive at All3Media International, is another who sees a “new acceptance” emerging around themes of gender identity. “There are more positive, richly woven representations of gender and sexuality. New norms are being created through the media. Stories are played out, igniting global conversations on scales that have never been seen before, spreading from politics to fashion.”

In All3Media’s catalogue, she says, shows that challenge conventional attitudes to gender identity include Swan Film’s courageous *Muslim Drag Queens*, “a Channel 4 First Cut documentary narrated by Ian McKellen that gives unprecedented insight into the UK’s ‘Gaysian’ community. It’s a sensitive, provocative and liberating film focuses on the stories of three Gaysian drag queens who face the seemingly insurmountable challenge of gaining acceptance and tolerance within the wider community”.

Also on the slate is a series of shows fronted by transvestite Grayson Perry. The latest, says Clark, is “*Grayson Perry: All Man*, in which he spends time with men from different parts of society and produces a number of artworks inspired by the things he learns from them



Miss Transgender



Girls to Men

about the current state of masculinity”.

In terms of scripted content, Endemol Shine International CEO Cathy Payne says one of the most important things to note is the way that the transgender debate has been addressed without undermining the core integrity or quality of shows. “*Transparent* and *Orange is the New Black* are high-profile examples of that, but we’ve also enjoyed a lot of success with *Boys Meets Girl*, a Tiger Aspect comedy for BBC Two that has just been renewed,” says Payne. “That show is about a man who meets an older woman, who happens to be transgender [played by transgender actress Rebecca Root]. It’s a really interesting, insightful subject for a story line.”

ESI also has a documentary called *Young Trans and Looking for Love*, produced by Barcroft Productions for BBC Three, which

tells the moving story of a couple who have both transitioned in the opposite direction. On the subject of the commercial appeal of such shows, Payne says: “The bottom line is that we’re looking for good stories and characters. We have lots of shows in our catalogue that aren’t right for some buyers or others. Buyers know their markets and can decide for themselves what works.”

That said, the recent trend for transgender-focused programming has probably peaked. However, Mutimer says it is leaving behind an important cultural legacy, which is that more and more transgender people “are being featured as contributors in shows where they are not necessarily the main focus. This makes the topic less of an issue and more an accepted part of life.”

AUDIOVISUAL FROM SPAIN

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MOTHER CHEF
LIFESTYLE - 52' - FACTORÍA PLURAL



FC BARCELONA: PASSION & BUSINESS
SPORTS - 50' - COMERCIAL TV

GLAAD ON TV

Transgender has been the big talking point in the TV industry over the last year, but there are numerous other issues to be resolved surrounding the portrayal of other members of the Lesbian, Gay, Bisexual and Transgender community on TV. Fortunately, the US has an organisation called GLAAD that has spent 20 years scrutinising the industry and helping it do a better job.

One of GLAAD's key activities is the production of an annual report that catalogues appearances by LGBT characters in US TV shows and also analyses their portrayal. "Having LGBT characters in shows is only part of it," says GLAAD director of entertainment media Ray Bradford. "There are also tropes that tend to reinforce negative perceptions of the LGBT community, so we spend a lot of time working with writers and producers to overcome those."

An example, says Bradford, "is the way that bisexual characters tend to use their sexuality to get what they want. It creates an impression that they are untrustworthy and manipulative. One show that has managed to correct that impression is The CW's *My Crazy Ex-Girlfriend*, which counters that negative stereotype."

Generally speaking, GLAAD's data shows that pay TV and streaming services have been much better at including positive LGBT role models, the standout example being Laverne Cox on *Orange is the New Black*. One mainstream show that does get GLAAD's vote of approval in its report is Fox hit *Empire*. Season two saw gay musician Jamal Lyon "taking on more of a business role as the head of the family music label, Empire," says GLAAD. "Tianna, a bisexual artist signed to the label, was upped to a series regular. Other gay, lesbian and bisexual characters recur."

GLAAD also applauded Fox's new show *Rosewood*. "While crime procedurals have

long been a place where LGBT characters were most often included as villains or victims, this season introduces lesbian couple and pathology experts Pippy and TMI," it says.

Bradford adds that *Grey's Anatomy* and *Modern Family* have also played an important role. "*Modern Family* succeeds because of the quality of its characters and storylines, and it just happens that two of the lead characters are gay. A key part of our message is that we want TV to be inclusive of all types of LGBT characters." In other words, it's not about populating shows with morally flawless LGBT



Modern Family

characters, but reflecting society accurately.

Bradford says that, in general, "TV is doing much better in LGBT portrayal than the film business. What's pleasing about TV's efforts is that a lot of the leading players have channels around the world. So a show like *I Am Cait* on E! is hitting a global audience. We're going to do some work on this to see what impact that has in both progressive and regressive countries."

The US is probably the benchmark in terms of taking the LGBT community seriously in scripted content, but GLAAD is also positive

about the work done by *Hollyoaks* in the UK and *Neighbours* in Australia. *Hollyoaks*, for example, worked with the Terence Higgins Trust on a storyline involving a gay character with HIV.

"We have wanted to tell this story for a long time and while HIV can affect anyone, infection rates in young gay men remain too high, and to ignore that is to do the gay audience a disservice," says Bryan Kirkwood, the show's executive producer. "*Hollyoaks* is in a unique position to talk directly to millions of young viewers and if the safe-sex message

is not coming through education, we can help with that on-screen and through multi-platform support."

Other LGBT high notes from outside the US include Russell T. Davies' 2015 trilogy *Cucumber*, *Banana* and *Tofu*, which was made for the BBC and has sold to broadcasters including SVT. Also of note is *Vicious*, an ITV sitcom starring Ian McKellen and Derek Jacobi that is distributed internationally by Endemol Shine International. With two series and a special, *Vicious* has been sold to PBS in the US and Network Seven in Australia.

A good current example of this point would be the UK version of *The Voice*, where a transgender performer, Jordan Gray, has (at time of writing) reached the final 12. There are also other high-profile examples. The *Next Top Model* franchise, for example, had its first transgender winner in the 2015 Dutch edition (Loiza Lamers), and Israel's Channel 24

recently aired a show to find the next big female pop group, fronted by Dana International, the transgender Eurovision Song Contest winner.

In the UK, BBC soap *EastEnders* has also taken an important step, introducing its first transgender character, played by transgender actor Riley Carter-Millington.

EastEnders executive producer Dominic

Treadwell-Collins says: "From Mark Fowler's HIV to Colin and Barry's first gay kiss, *EastEnders* has always led the way in changing perceptions about 'difference'. In Riley we have found not just a talented actor, but also an inspirational young man."

Millions of viewers have now also met Riley in primetime. **TBI**

A DIFFERENT POINT OF VIEW

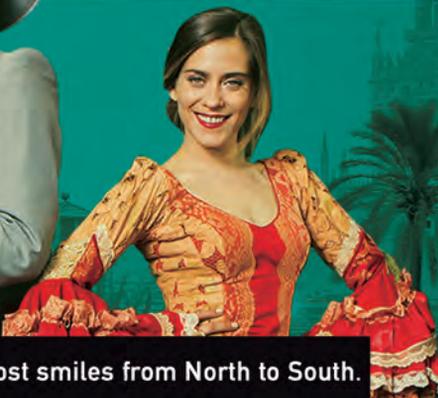
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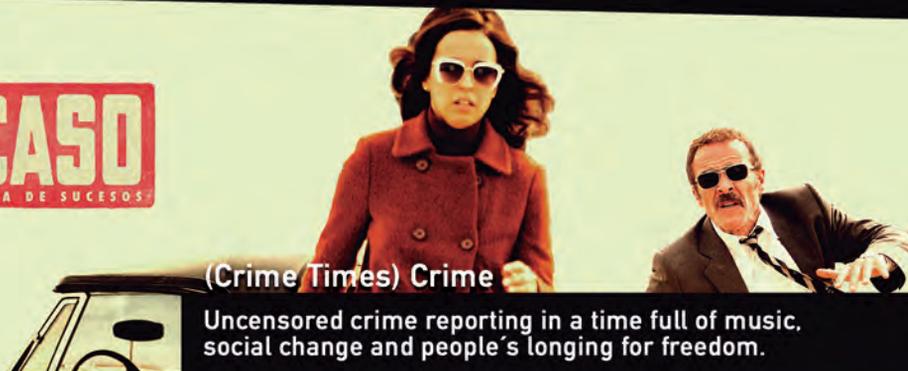
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The Billionaires' Club

An increasing number of television content brands have now registered YouTube and digital media hits in the hundreds of millions, with some even topping a billion. How do content producers generate huge numbers of hits on video platforms, what's the return and benefit, and what are the standout successes? Juliana Koranteng finds out

The moment the video for Gangnam Style, the 2012 South Korean hit recording, became the first to reach one billion views on YouTube, the entertainment industry gained proof that online distribution had measurable commercial value.

The international TV sector is no different. It is being driven to capitalise on all available digital channels, from broadcasters' websites to millennial-friendly apps like Instagram, Vine, Snapchat and WhatsApp to leading social media platforms YouTube and Facebook. Together, they are delivering live video daily to billions of consumers.

Should your TV show successfully exploit these new media tools and reach most of the world's digitally connected audience, be prepared to enter the exclusive 'Billionaires' Club' for TV viewing hits.

In terms of generating revenue, most agree linear TV is still king in the content realm. In an era where there is a whole generation that does not watch scheduled TV entertainment, however, a brand is not making a real impact if it does not reach out to where the digital

natives are. And if you want millions of them and billions of views, then be prepared to be online.

Billionaires' Club members include FremantleMedia, the production and distribution colossus behind the *Got Talent*, *Idol* and *X Factor* brands. It operates 230 YouTube channels centred on its TV hits, and combined, they garner more than one billion views a month from almost 30 million subscribers.

Britain's Got Talent alone has recorded more than 3.3 billion views to date; *Arab Idol* boasts 1.2 billion views; and *America's Got Talent* will soon reach the billion milestone with, currently, over 938 million views.

"There are significant commercial and marketing consequences to successful online content," said Tom Hoffman, FremantleMedia's VP, digital and social media. "Our big TV brands get big numbers. We've made *Got Talent* in 69 local territories, *The X Factor* in 52, *Idols* in 55, *Take Me Out* in 34 and *Farmer Wants a Wife* in 31, so we have a lot of content that is perfect for the online environment: it's quick, entertaining,

shareable and commercial."

It is also effective. As far back as 2009, Hoffman says, the international popularity of the clip showing Susan Boyle's *Britain's Got Talent* audition, "encouraged format sales in other countries where the clip was getting lots of views".

"It was also the start of our relationship with YouTube, to work together and maximise the opportunities on that platform," he adds.

YouTube doesn't guarantee billions of views for TV brands (its top 20 videos with a billion-plus views are dominated by pop music videos from the likes of Adele and Justin Bieber).

But it can ensure reach and brand awareness, as noted by John Robson, COO of DHX Media subsidiary WildBrain Family International, which creates kids content for YouTube and other digital channels.

"The limitless shelf space of YouTube allows me to schedule as much or as little content as I choose," he says. "I can also experiment with content types, new shows, new formats and short-form with little risk and gain immediate feedback from fans and consumers. It's also an interesting space for



heritage TV shows, which no longer air on linear TV or haven't been maximised globally through traditional channels."

Robson adds that the power of YouTube includes the ability to search for content and share it, which is all engagement that is measured by YouTube's global analytics.

YouTube can also be used to package content targeted at specific audiences, such as the families and kids WildBrain is targeting. "Millions of views can be for the most simple videos, especially for shows with an active fan base," Robson says. "A simple *Teletubbies* unboxing video we produced recently, featuring a new toy range, has already generated more than 92,000 views."

Big view numbers also attract advertisers. "It offers insights that can be useful to show audience demand," says Robson.

International production and distribution giant All3Media is also a YouTube fan with 6.2 million-plus subscribers of 148 channels boasting more than 1.7 billion views.

Indeed, it is almost impossible to find a linear and digital TV operation without some kind of YouTube presence. But as Selma Turajlic, co-founder of All3Media subsidiary Little Dot Studios notes, other social-centric

show are gone; each digital platform needs to be considered as part of a viewer journey, and content produced for YouTube, Facebook or Snapchat should be optimised for each platform," she said.

"There are significant commercial and marketing consequences to successful online content"
Tom Hoffman, FremantleMedia



digital platforms are trying to match the distribution and marketing powers offered by Google-owned YouTube and its one billion registered users.

"The days of filming some 'behind the scenes' online content to accompany your TV

As more premium content is uploaded online, the more demanding viewers get. They are interacting and engaging with content by clicking 'Like' buttons, making comments, sharing, and using search engines to discover new content.

Fremantle's Hoffman says: "Engagement can be as valuable as billions of views. For instance, our UK digital label Shotglass Media produces *The Football Republic*, a YouTube network of football fan channels, created by fans and for fans. The network gets great numbers, but more than that this audience is passionate, authentic and consistent. This not only makes great content, but means they're more deeply involved in the conversation, which gives brands a unique opportunity to get involved in a more meaningful way."

Online distribution also compels producers, distributors and marketing executives to be more tech-focused. Moreover, it is a labour-intensive activity.

"Brands need an active year-round YouTube strategy," says WildBrain's Robson. "To have a real community, you need to be publishing and engaging with them on a daily basis, and going beyond what the same audience would get on television."

Matt Campion, creative director at Spirit Digital Media, a Content Media Corp



schedule, so you need online content as a marketing tool to help the audience find your



subsidiary specialising in multiplatform delivery and audience building, emphasises the need to respond almost immediately to what you learn about an audience's reaction.

"With linear TV, to be frank, no one has ever known what the ratings actually mean, and you rely on third parties to measure them," he says. "But online, the measurement figures are there for everyone to see."

After YouTube, Facebook has become one of the fastest-growing video-sharing platform. By the beginning of 2015, the number of videos uploaded on to Facebook, now with more than 1.5 billion registered users, had jumped 75% compared with the year before. By November, it was recording eight billion views daily compared with four billion about six months before.

"People are choosing and picking their own

show," Campion adds.

As young audiences increasingly demand a

say in what, how, when and where they watch TV, Zurich-headquartered Joiz has built a multiplatform social TV network from scratch.

Currently, in Germany, Switzerland and Austria, the satellite-delivered Joiz offers shows that its young viewers communicate with, and contribute to, via mobile devices.

Related conversations taking place on social media can also be seen live on large screens in the studio, and the bespoke technology gives advertisers an accurate measurement of how the audience responded to their campaigns.

"Our unique platform was designed and built from the ground up to converge the worlds of TV and online, delivering the richest data about our viewers and users,



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and providing whole new ways to monetise audiences,” says Britta Schewe, Joiz Germany’s managing director.

“Success is about engagement and in the world of social TV, building an active, engaged community around your brand is key. At Joiz, our technology not only tells us who our viewers are and where they are but also how they are participating and interacting.”

For a recent ad campaign to promote German commercial network Tele 5’s Schlefaz (‘The Worst Film of All Time’) season, not only was a social media buzz created around the series, but the films were shown on all Joiz platforms. In addition, live events were organised in the Berlin studios so that viewers could chat in real time with studio guests



in only Norwegian movies for expats abroad as an example of the small specialist SVOD services to keep an eye on. A similar format offering the Best of British TV entertainment can be found at Acorn TV, a subsidiary of US-headquartered RLJ Entertainment.

not trying to compete against Netflix. They are small, so our deals with them are on a revenue share basis, but that is starting to show solid income for us.”

All3Media International’s executive VP, commercial development, Gary Woolf, argues that the lines that once separated the different types of digital media are increasingly indistinguishable.

For example, he says, streaming services are available via multiple devices. In the UK, you can subscribe to Netflix via a Virgin Media cable TV set-top box. Britain’s Channel 4 and public broadcaster BBC are using their on-demand and catch-up services to experiment. Major shows are premiering on Channel 4’s All 4, while the youth-focused BBC Three has been pulled off air and is exclusively online.

Even the traditional pay TV operators have stepped into the OTT space. Examples are Sky’s Now TV in the UK and Dish Network’s Sling TV in the US. Then, there are the TV Anywhere and box set VOD concepts being offered by a host of networks.

“While it is true that some of our edgier comedies are likely to sit in the on-demand OTT space [for example *Fleabag* is a BBC Three commission and *Fresh Meat* sits on Hulu in the US], the reality is that there are more homes now for long-form high quality content across the platforms,” Woolf adds.

The growing abundance of digital distribution platforms means the skills for



about the movies.

“Tele 5 were able to access the Joiz community who came together both online and offline,” says Schewe. “The collaboration picked up an award for its innovation.”

Big names like Netflix, Hulu and Amazon, with their big content-investment budgets, have defined what subscription-funded VOD platforms can do for distributors.

But as Wayne Davison, commercial director at international distributor DRG, points out, the same technology opens new niche-content opportunities that are rarely highlighted.

Although the SVOD players are among DRG’s biggest customers, Davison cites Films of Norway, a streaming platform specialising

“We’re seeing such a drop off in [traditional] pay TV, in terms of audiences, and the fees we get from them are getting smaller,” says Davison. “We see these [micro] platforms as another way of watching content. They are



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Susan Boyle on *Britain's Got Talent*

“smart windowing” are more vital than ever [see page XX].

“For us, the challenge is managing exclusivity in a world where different ecosystems continue to evolve,” Woolf says. “It’s about ensuring that content is where the viewer would go to find it, curated in a way that it is discoverable, while retaining value across multiple windows.”

So what does the future hold for a content business where the size of the audience (as in number of views) matters, but also the revenue generated?

Barcroft Media, which owns the Barcroft TV YouTube channel with its more than 1.6 billion views, specialises in producing short-form factual content. As a content producer, it is company that knows how important it is adapt to digital media technologies changing at revolutionary speeds.

In addition to producing up to ten original pieces of video content for YouTube distribution weekly, and feeding content to its more than 400,000 Facebook followers, it has jumped into the fast-emerging realm of virtual reality.

The company recently sealed deals with cinematic VR platform Jaunt and award-winning 360° filmmaker Drew Gardner to produce immersive entertainment for video audiences.

Although VR is set to go mass market this year, Barcroft Media founder and CEO Sam Barcroft believes it is actually 360° films for which you don’t need goggles that shut viewers out from their physical surroundings that will gain popularity.

All the same, both formats prove the future of determining what is hot and what is not will

become more challenging.

“Audience measurement has been gamified,” says Barcroft. “Already, we can see how an audience is responding to content, and responding in real time. We work hard to combine our editorial knowledge and work out where the demand is.”

He reminds the industry how algorithms and programmatic advertising can respond quickly to online trends. This means what your audience and advertisers want takes even more precedence.

Online audiences and advertisers are progressively more and more attached to mobile devices. Research company eMarketer predicts that there will be 78 million millennial video viewers by this year’s end in the US alone. The GSM Association, the global



Barcroft Media

on the platform to grab a piece of the growing digital video advertising revenue. Elsewhere, global media agency ZenithOptimedia calculates mobile will be the world’s third largest advertising medium, overtaking newspapers, this year.

So TV content owners’ definition of success

“We can see how an audience is responding to content in real time. We work hard to combine our knowledge and work out where the demand is”

Sam Barcroft, Barcroft Media



mobile operators’ trade body, forecasts 5.9 billion smartphone users by 2020.

Snapchat, the ephemeral photo and video mobile service that teenagers love, recently announced it receives eight billion daily video views, as many as the now comparatively old school Facebook.

Facebook’s messaging app Instagram has been trialling how to measure videos viewed

has to constantly keep moving.

“We’re at the intersection of where science meets creativity,” says Spirit Digital’s Campion. “We look at the data on audience behaviour and continuously change the editorial, the editing pace, the release schedule, and the distribution platform accordingly. We have to use all these different angles to make the content work.” **TBI**

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Roots Episodes 4x120' **Genre** Mini-Series **Synopsis** A historical portrait of slavery recounting the journey of one family's will to survive, endure and ultimately carry on their legacy despite enormous hardship and inhumanity.



UnREAL Episodes 20x60' **Genre** Series **Synopsis** UnREAL looks at the lives of PEOPLE WHO EAT, BREATHE AND SLEEP THEIR CAREERS! This dramatic series is about RELATIONSHIPS, LOVE, EGOS, AMBITION and MANIPULATION in the WORKPLACE.



Gangland Undercover Episodes 14x60' **Genre** Series **Synopsis** Series takes viewers inside a covert operation chronicling meth dealer turned ATF infiltrator, Charles Falco, on his mission inside a notoriously violent outlaw motorcycle gang.



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Stand R8.C20



Big Red: The Original Outlaw Racer Episodes 8x60' **Genre** Factual Entertainment Series **Synopsis** Big Red's original driver RJ Gottlieb travels to new areas of the USA to put the prize winning Camaro through its paces and rule the road once again.



The Innocence Network Episodes 4x60' **Genre** Factual Series **Synopsis** True crime series with unprecedented access to The Innocence Network, a global group working to exonerate the unjustly convicted and reform the criminal justice system.



Employable Me Episodes 3x60' **Genre** Factual Entertainment **Synopsis** Powerful series following the lives of people with neurological conditions as they hunt for jobs that fit their unique abilities.



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Fear The Walking Dead - Season 2 Episodes 15x60' **Genre** Drama **Synopsis** A gritty drama, set in the *The Walking Dead* universe, that explores the onset of the undead apocalypse via a fractured family.



Into the Badlands - Season 2 Episodes 10x60' **Genre** Drama **Synopsis** The story of a ruthless, well-trained warrior and a young boy who embark on a journey across a dangerous land controlled by feudal barons.



Halt and Catch Fire - Season 3 Episodes 10x60' **Genre** Drama **Synopsis** Capturing the rise of the PC era in the early 1980s, featuring characters attempting to innovate against the changing backdrop of technology and Texas' Silicon Prairie.



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Magical Moors Episodes 1x90, 2x45' **Genre** Nature, Wildlife **Synopsis** The rugged Moor landscape has long fuelled our imagination, inspiring artists and poets, evoking images both terrifying and deeply romantic.



Mafia Queens Episodes 4x52, 90' **Genre** History, Crime **Synopsis** Women who climbed to the top of their clans... Women who changed the rules of the game... Women the camorra changed forever.



Children of Dictators Episodes 4x52, 90' **Genre** History **Synopsis** Imagine you are a child of a dictator with absolute power. Can history change your mind about your father? Can facts effect your emotions?



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Beach Cops Episodes 6x30' **Genre** Crime & Investigation **Synopsis** Millions of people flock to Sydney's Northern Beaches every year. However, between the summer heat, drugs, alcohol, antisocial and criminal behaviour, there is a darker side.



Too Many Cooks Episodes 20x30' **Genre** Lifestyle **Synopsis** In this new and fast-paced funny food format, three keen-as-mustard cooking couples compete against each other to lay on the best spread for some very demanding party hosts.



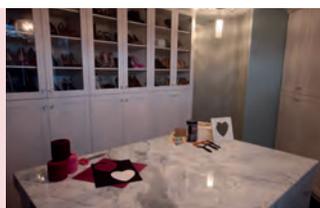
Love It or List It Vacation Homes Episodes 13x60' **Genre** Lifestyle **Synopsis** Spin-off from Love It Or List It, featuring unique homes and breathtaking scenery, the focus turns on homeowners whose love affair with their beloved holiday home has fizzled.



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Africa's Hunters Episodes 6x60' 4K & HD **Genre** Nature & Wildlife **Synopsis** Powerful, personal stories, will reveal the unique characters and amazing adaptations of Africa's top predators, followed across a number of weeks in the Zambia wilderness.



Holiday Makeover Episodes 6x30' HD **Genre** Lifestyle **Synopsis** Hosts Alison, Denise and Adjoa use their expertise in crafting, baking and decorating to help one lucky person create a sensational DIY celebration.



National Parks Secrets and Legends Episodes 8x30' HD **Genre** Factual Entertainment **Synopsis** Curses, cults, and horrifying catastrophes are among the bone-chilling eyewitness accounts that make SECRETS AND LEGENDS one of the scariest show on television.



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The Secret Agent Episodes 4x45' **Genre** Drama/Mini-Series **Synopsis** An explosive and heart-breaking adaptation of Joseph Conrad's classic novel, in a tale of terrorism, espionage and murder set on the streets of Victorian London.



Slasher Episodes 8x60' **Genre** Thriller Series **Synopsis** The gripping story of a young woman who finds herself the centerpiece in a series of horrifying copycat murders based on her parents' grisly killings.



Keeping Up With The Kruger Episodes 13x60' **Genre** Non-Fiction Series **Synopsis** This fascinating documentary takes a unique glimpse into the day-to-day life of one of the wildest places on earth, South Africa's Kruger National Park.



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You Me Her Episodes 10x30' **Genre** Dramedy Series **Synopsis** What begins as an impulsive "date" between suburban husband Jack and neophyte escort Izzy spins into a three-way affair including Jack's wife Emma who's been keeping secrets of her own.



The Walking Dead S6 Episodes 16x60' **Genre** Drama/Suspense Series **Synopsis** With no hope of safety, Rick and his band must become the threat themselves to claim their place in this newfound landscape.



Fear The Walking Dead S2 Episodes 15x60' **Genre** Drama/Suspense Series **Synopsis** The world has become very cruel and violent; will the surviving group remain true to themselves and stay together when nobody is safe?



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Breakthrough Episodes 6x60' **Genre** Science Documentary **Synopsis** A thought-provoking and imaginative look at breakthrough scientific discovery as it unfolds, with episodes helmed by major talent eg Ron Howard, Paul Giamatti, Peter Berg.



The Story of God with Morgan Freeman Episodes 6x60' **Genre** History/Religion/People Documentary **Synopsis** How religion has shaped the history of the world. Morgan Freeman visits iconic religious sites worldwide and talks to religious leaders.



He Named Me Malala Episodes 1x90' **Genre** People/Biography/Feature Dcoumentary **Synopsis** An intimate portrait of Nobel Peace Prize Laureate Malala Yousafzai, who was shot by the Taliban and now campaigns globally for girls' education.



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Vet On The Hill Episodes 10x60' **Genre** Factual **Synopsis** Set in the quiet village of Richmond upon Thames, Vet On The Hill is a genuine insight into the highs and lows of a small grassroots practice



Operation Thailand Episodes 10x60' **Genre** Reality **Synopsis** The emotional journeys of a diverse group of people who travel to Thailand, combining cosmetic surgery with a luxury vacation. It will be a trip that will change their lives forever.



The Lie Detective Episodes In development **Genre** Reality **Synopsis** Steve van Aperen has the ability to see through people – killers, psychopaths, master liars, giving us an insight into what makes these villains think, plot and deceive.



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Narcos Episodes 20x60' **Genre** Drama **Synopsis** From Jose Padilha, comes an inside look at men who would stop at nothing to take down Pablo Escobar and change the drug trade forever.



F is for Family Episodes 6x30' **Genre** Animated Comedy **Synopsis** From Executive Producer Vince Vaughn and created by Bill Burr with Michael Price, this animated comedy follows the Murphy family in the 1970's when rules were completely different.



The Frozen Dead Episodes 6x60' **Genre** Drama **Synopsis** A horrific discovery in a small town nestled high in the French Pyrenees begins to unravel a dark mystery that has been hidden for years.



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Inside the World's Toughest Prisons Episodes 4x60' **Genre** Factual **Synopsis** Crime journalist Paul Connolly goes behind the bars of some of the toughest prisons, living side by side with drug dealers, rapists and murderers locked up for their crimes.



James May: The Reassembler Episodes 3x60' **Genre** Factual **Synopsis** James May meticulously reassembles a host of objects from scratch, from an old telephone to an electric guitar, revealing their inner workings and their history.



Killer Women with Piers Morgan Episodes 2x60' **Genre** Factual **Synopsis** Piers Morgan travels through Florida and Texas to meet some of America's most notorious female murderers.



Web itvstudios.com
Stand R7.N3



Victoria Episodes 1x90' + 7x60'
Genre Drama **Synopsis** The start of a landmark account of British history's most significant monarch, involving the circuits of power in Westminster, the fast-growing family and the sometimes scandalous palace staff.



Drive Episodes 5x60' **Genre** Format **Synopsis** Drive pitches eight celebrities against each other in an adrenaline charged race with a difference. Celebrities will take charge of bangers, buggies, 4x4s and rally cross cars in action packed challenges.



Poldark Series 2 Episodes 10x60'
Genre Drama **Synopsis** Returning home following his arrest in the finale of series one, Ross (Aidan Turner) soon faces a fight for freedom when George Warleggan tries to steal his mine and have him hang as a revolutionary.



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The A Word Episodes 6x60' **Genre** Drama **Synopsis** The A Word is a unique and thought-provoking drama about a complicated extended family with a child newly diagnosed with autism at the centre.



Touch Genre Game Show **Synopsis** Touch is a new cross media brand, TV and mobile game, in which gut reaction, sharp eyes and quick fingers can win prizes.



Battle of the Chefs Episodes 4x75' **Genre** Factual Entertainment **Synopsis** What happens when two of the country's most successful chefs are sent to a country which produces some of the world's finest cuisine to battle it out for the title of best chef?



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Wellie Wishes Episodes 26x11' **Genre** Girls 5-7 **Synopsis** This beautiful new 2D animation series from American Girl navigates friendship and life-lessons through play and imagination, and is set to inspire girls around the world.



Thomas & Friends: The Great Race Episodes 1x60' **Genre** Pre-school **Synopsis** This new Thomas & Friends movie special sees Thomas going on an exciting adventure at the Great Railway Show, meeting a host of new international characters along the way.



Dreamtopia Episodes 1x44' **Genre** Girls 5-7 **Synopsis** Barbie's latest special is a make-believe world imagined by Chelsea, Barbie's youngest sister, where imagination takes them on incredible adventures and they can be anything they want.



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HIGH&LOW Season 1 and 2 Episodes 20x30' **Genre** Action **Synopsis** With two enemy teams forming five gangs, this story depicts both the fierce battles and the realistic world of grownups that lies hidden behind all the violence



ENDRIDE Episodes 12x30' **Genre** Fantasy/Action **Synopsis** What destiny awaits when the two young men meet? This is an adventurous fantasy depicting ENDRIDE, a world on the other side of Earth.



Matsuko in the Room! Episodes 13x30' **Genre** Entertainment **Synopsis** Matsuko Deluxe, an ever-popular MC, showcases trending spots in Japan via live broadcast that delve deep into unfamiliar places and people, uncovering the latest cultural trends.

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Cleverman Episodes 6x60' **Genre** Scripted Drama **Synopsis** Cleverman is a smart, sexy and original new drama for ABC Australia and SundanceTV starring Iain Glen and Frances O'Connor.



Kiss Bang Love Genre Format and Factual Entertainment **Synopsis** The provocative dating format from the creators of "Married at First Sight", that puts the power of kissing to the test in this radical new TV experiment.



Bosch Season 2 Episodes 10x60' (Total 20x60') **Genre** Scripted Crime Series **Synopsis** Titus Welliver ("Argo") is back as homicide detective Harry Bosch in a new season of this acclaimed crime series based on Michael Connelly's best-selling novels.



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Splashlings Episodes 52x11' **Genre** Animated/ Adventure series **Synopsis** Four brave, adventurous mermaids keep watch over their magical underwater kingdom in this colourful series from the creator of Pound Puppies.



The Moblees Episodes 50x11' **Genre** Live- Action preschool series **Synopsis** Featuring fun moves, memorable music and catchy lyrics, this fun series features five loveable characters who get kids up and moving through playful participation.



Firsts Episodes 26x5' **Genre** Live- Action kids series **Synopsis** Firsts follow the comedic adventures of Glitch Gearhart and her pals as they travel through time to witness every amazing first in history.



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Nils Holgersson Episodes 52x13' (26 avail. Dec 2016 & 26 avail. April 2017) **Genre** CGI Animation **Synopsis** An elf changes Nils into a miniature human. With his faithful friend Martin the gander he embarks on an extraordinary journey among the wild geese.



Arthur and the Minimoys - The Series Episodes 26x26' (20 avail. Dec 2017 & 6 avail. Feb 2018) **Genre** CGI Animation **Synopsis** Arthur visits Selenia and Betameche. This time the King of the Minimoys is organizing resistance against tyrant Malthazar...



The Wild Adventures of Blinky Bill Episodes 52x11' (26 avail. Dec 2016 & 26 avail. June 2017) **Genre** CGI Animation **Synopsis** Green Patch would be a quiet refuge from the dangerous outback but with Blinky, everyday life is a chain of escapades.



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Money For Nothing Episodes 40x60' **Genre** Lifestyle **Synopsis** Vintage designer and writer, Sarah Moore, transforms unwanted items into valuable, bespoke pieces for a profit.



The Cruise Episodes 6x30'/3x60' **Genre** Lifestyle **Synopsis** With exclusive and intimate access to one of the world's largest luxury cruise liners this series chronicles life aboard the Regal Princess.



The Private Lives of the Tudors Episodes 3x60' **Genre** History **Synopsis** An intimate look at lives, loves and scandals of one of the most celebrated royal dynasties.

LAST WORD



DEAN REICH

Charging mobile content

Not long ago, 'portable TV' was a screen with a handle. Nowadays, all television is portable: you can take your favourite shows with you anywhere with a strong mobile signal or WiFi.

We're witnessing an explosion of viewing on smart mobile devices – up to 30 minutes a day in the US on tablets and smartphones, according to reputable estimates. You can now view in bed, in transit, at the gym, even in your living room (heaven forbid).

This trend towards on-demand viewing is being driven by the take-up of smartphones with larger, better screens and the spread of 4G networks, making mobile a viable distribution platform for HD video. Currently, short-form video – professionally produced and user-generated – aimed at younger audiences is predominantly viewed.

Established media brands like MTV compete fiercely against native digital publishers like BuzzFeed, and individual influencers, to drive the digital watercooler. This content is for viewing, sharing and discussing via mobile devices on social platforms. Ericsson estimates that YouTube currently accounts for between 50% and 70% of all mobile video traffic.

But a shift in mobile viewing habits towards more long-form consumption is evident to anyone who has shared their commute home with a *Game of Thrones* fan. Mobile networks

have launched subscription entertainment services such as Netflix, which accounts for between 10% and 20% of mobile video traffic. Next will be a significant expansion of pay TV services delivered via mobile, as networks seek to increase average revenue per user.

Some mobile network operators are partnering to co-market pay TV bundles: Vodafone UK's Red 4G-data-plan subs can access Sky's Now TV service, offering a mini-basic tier of 13 channels plus VOD. Others have bought pay TV providers, allowing them to bundle mobile and pay TV as part of a 'quad play' alongside broadband and fixed line. And, if our discussions at this year's Mobile World Congress are anything to go by, the next step for forward-thinking operators may be to launch their own pay TV services to claim more subscription revenues.

Consequently, Viacom believes mobile is the largest incremental distribution opportunity. We forecast the total number of pay TV subscribers globally will increase significantly by the end of this decade, driven by smartphone penetration and an expanded global middle class. Indonesia, with just 9% pay TV penetration but 330 million mobile connections, shows the opportunity's scale.

So how do content companies gain an advantage? Our strategy is to make content compelling to mobile-friendly young audiences that's available on every platform and device on

which they would expect to find it.

Our content model has evolved from linear to multiplatform, with more of the US\$4 billion we spend each year being invested in short-form – both digital originals, such as MTV's *It Girls*, and supplementary short form content from shows like *Drunk History* and *Dora the Explorer*. Production models reflect shorter small-screen attention spans: a show like MTV's *The Ride* can as easily play as a dozen or so short-form clips as a full 22-minute linear TV episode.

Just as importantly, alongside the likes of HBO, CNN and Disney, we're evolving our distribution model through the launch of mobile streaming apps – one for each of our global brands – offering a live linear stream and VOD access to our library content.

We're striking deals with traditional pay TV distributors to integrate these 'Play' apps into their TV Everywhere offerings. We are also negotiating with mobile networks to distribute them as part of emerging mobile TV services.

The common assumption is that mobile viewing is substitutional, but our experience is the opposite: flexible access to a larger selection of content increases consumption. In Latin America, the pre-TX premieres of MTV's *Super Shore* via the MTV Play app drove three million streams in the first ten days from launch, while the linear TV audience for the show's first episode was more than 200% higher than the premiere episode of its predecessor, *Acapulco Shore*.

A mobile entertainment revolution is underway, given irreversible momentum by consumer demand. Content companies are working with mobile networks and pay TV providers as they adapt their strategies to meet the changing expectations of their customers. If they don't meet those expectations, then a competitor, either existing or emerging, certainly will. **TBI**

A shift in mobile viewing habits towards more long-form consumption is evident to anyone who has shared their commute home with a *Game of Thrones* fan

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