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Television Business International

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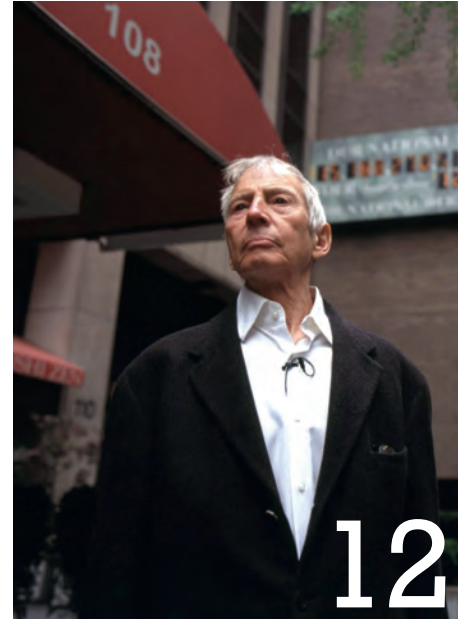
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EDITOR'S NOTE

STEWART CLARKE



Television trends are informed by all elements of pop culture, but the impact that *Serial* has had is unprecedented for a podcast. Sarah Koenig's brand of super in-depth investigative journalism has fired the public's imagination for a new take on true crime. Unsurprisingly, it was HBO and Netflix that captured that on (cable and internet) TV with *The Jinx* and *Making a Murderer* respectively, and in the factual world this serialised investigative doc genre is what people are talking about.

We've never had as many true crime offerings pitched for our MIPDoc Hot Picks feature as this time around, underlining its of-the-moment appeal. With all the momentum behind this category of programming, we investigate where it is heading and what we can expect next, and also preview a couple of choice true crime series in our Hot Picks.

Elsewhere, we head back into virtual reality. When we first looked at VR a year or so ago, there was a lot of talk, but not much actually out there. Now, there is even more talk and hype, but also a growing range of immersive content. With Sony, Oculus and HTC all about to launch new high-end headsets, we look at what the opportunity is for producers, distributors and channels, and ask analysts whether, having been burned

by 3D, consumers will embrace VR.

We also talk to Sky content boss Gary Davey about running programming at the European pay TV giant, and how it is ramping up content plans now that the UK, Germany and Italy businesses are one operation. It has added Showtime content to Sky Atlantic, but is also becoming a force in original drama, as Davey explains.

Telemundo's network chief Luis Silberwasser tells us about how he has rejigged the US Hispanic broadcaster's schedule in an effort to provide a real alternative to the popular Univision, rather than more 'me-too' product. The result is new forms of drama and novella, the latter a genre that has remained largely unchanged for decades.

Buyers will get to see the new Telemundo fare, as well as Sky's fresh offerings, and the latest long-form true crime shows at MIPDoc and MIPTV in April. See you there.

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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

DAN ISAACS is leaving his post as co-CEO of Endemol Shine Group-owned Kudos to reunite with former production partner Jane Featherstone, who recently launched Sister Pictures. Diederick Santer will now lead Kudos as its sole CEO, with Martin Haines is rejoining Kudos from Warner Bros. Television Production UK to support him as COO



Former Endemol Shine UK bosses **David Flynn** and **Lucas Church** have created a new independent production studio, Youngest Media. The pair exited Endemol Shine Group last year following its creation at the end of 2014

NINA LEDERMAN has joined All3Media's US operation in the newly-created role of executive VP, scripted programming. Lederman has been at US cable net Lifetime for the past seven years as senior VP, scripted programming and development, and counts *UnReal* and the upcoming *Damien* as credits



Ex-Fox Television Group COO **Joe Earley** has reunited with former colleague Gail Berman by becoming president of her production firm, The Jackal Group. Earley exited Fox last year after 21 years with Rupert Murdoch's media giant

There have been several top-level changes at UK broadcaster ITV. Director of factual **RICHARD KLEIN** and director of entertainment Elaine Bedell have both exited following news ITV Studios boss Kevin Lygo was succeeding Peter Fincham as director of television



Bear Grylls Ventures head of production **Delbert Shoopman** has launched a new production company, Jackknife Media, with Ben Silverman's LA outfit Electus. Shoopman will retain his duties at *The Island* prodco BGV

Sumner Redstone has stepped down from chairman positions at Viacom and CBS, with respective company president-CEOs **PHILIPPE DAUMAN** and Les Moonves replacing him. Dauman's appointment was preceded by a boardroom battle with Redstone's daughter, Shari, who wanted an independent Viacom chairman appointed



US premium cable channel HBO has handed comedy chief **Casey Bloys** control of drama after the exit of executive VP Michael Ellenberg. Bloys has been promoted from EVP to president, series, late night and specials at the Time Warner-owned network

Fledgling UK indie 7 Wonder has hired **JEREMY LEE** from Red Arrow-owned UK prodco Nerd to become executive producer, and Patrick McMahon from TwoFour Group's Boomerang to become head of development. Head of popular factual Chris Wilson has left the producer





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While OTT has thus far been largely about series and movies, NBCUniversal's new direct-to-consumer OTT service Hayu will head in a different direction, offering up 3,000 episodes of reality TV fare from the NBCU catalogue. Stuart Thomson reports

NBCU gets real with OTT

NBCTUniversal is launching a reality-themed direct-to-consumer OTT service called Hayu that features over 3,000 episodes of its stable of reality shows, including staples such as *Keeping Up with the Kardashians*, *Made in Chelsea*, *The Real Housewives...* and *The Millionaire Matchmaker*. It launches in the UK, Ireland and Australia in March, with a monthly fee of £3.99 (US\$5.80) in the UK, €4.99 (US\$5.60) in Ireland and A\$5.99 (US\$4.25) in Australia. There will be no on-going contract and would-be subscribers will be offered a one-month free trial.

NBCUniversal describes Hayu as “the first all-reality service of its kind”, incorporating curated content and integration with social media, with a range of innovative features, including specially made short-form snippets of content that can be shared directly via fans’ social media accounts. The service will link directly to a wide range of third-party news sites with relevant content such as OK! and MailOnline. Users will also be able to directly access the social media feeds of stars of the shows they follow.

Most content will debut on the service on the same day as it premieres in the US, with over 500 episodes added each year. Box sets of shows will be available.

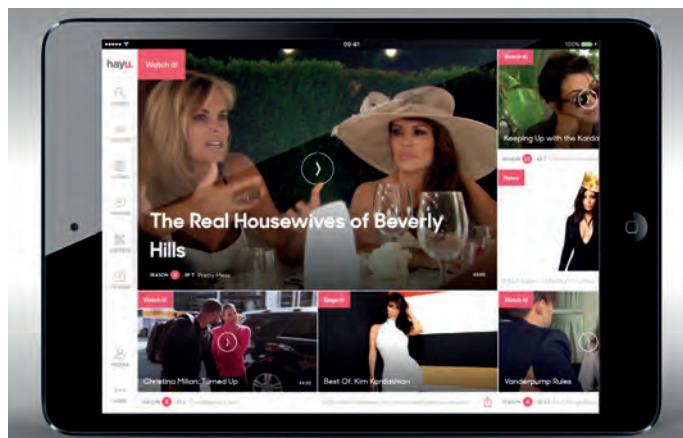
Hendrik McDermott, currently NBCU’s senior VP of branded on-demand, will run the service, while Phebe Hunnicutt, digital director of Elle at Hearst Magazines UK, has been hired to take charge of editorial and look after Hayu’s overall look and feel.

NBCUniversal chairman Kevin MacLellan says that the service will



be a pure direct-to-consumer offering. “We have been totally upfront with our distribution partners from the start, talking about how we can use this service to promote the reality content they have on air,” he says.

MacLellan added that only “a small proportion” of the reality content that NBCU produces each year is currently distributed in the three territories in which it is launching Hayu. “There are multiple networks that we run seven days a week in the US,” he says. “There is a lot of that content that people are pirating online, so we know they want to see it, but don’t know where to get it. My hope is that this service will take that reality content and get people more interested by allowing them



to watch more episodes and watch seasons from the beginning... and that will help drive people to the linear services as well,” says MacLellan.

There are about 50 shows on the service that have never been seen in the UK and a number of shows only became popular several seasons in, with people not having been able to see the first seasons of shows including *Keeping Up With the Kardashians* until now. Some content aired by third parties has been re-licensed, including UK series *Made in Chelsea*.

MacLellan admits that some of NBCU’s pay TV partners had reservations about the initiative but adds that there was “less nervousness than if we had just launched it without talking to them... our key partners in these markets have known about this for months.”

MacLellan says that he has not set any subscriber targets for Hayu. “I’m really not as focused – certainly at the beginning – on how many subscribers there are but on how people are engaging with it. My feeling is we can change it in real time and make it more appealing. In a year’s time I will start to look at what the numbers should be.”

MacLellan says that the price point for the female-skewing service is more or less based on prices for other services that are already available, and on things that the target audience pays for on a regular day-to-day basis. “We can say that this has real value and costs less than a Frappuccino,” he said.

MacLellan says that NBCU had decided to focus on English-language markets to start with, avoiding the need for dubbing. The launch markets are also the source of much pirating of the content currently, he says.

MacLellan describes Hayu is a “next generation VOD service with an appropriate level of interaction” for the target audience of 18-39 year-old females.

“It seemed like a great opportunity to aggregate the content into one place, but we wanted to do more than just be a video service provider,” he says. “We knew that this audience was different than that for what I would describe as general entertainment video services and that it would take something more than just video to engage them on a longer-term basis.” **TBI**

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With overnight ratings increasingly seen as redundant, US data science specialist Parrot Analytics has created a new way of measuring the success of a programme across all platforms around the world

Killer *Walking Dead* ratings: in the flesh

Perhaps the only thing stronger than zombies' desire for human flesh is the global television audience's addiction to record-breaking drama *The Walking Dead*. According to exclusive data revealed to TBI, the AMC scripted series is the most in-demand television show in the world.

In the fourth quarter of 2015, *The Walking Dead*, already firmly established as the US's highest-rating programme, had the highest 'Global Average Demand Rating', a metric developed by data science and technology specialist Parrot Analytics.

Within markets polled, *The Walking Dead's* popularity was at its highest in Canada with a 93.71 average Demand Rating, with the US second at 92.28 and the UK third at 89.59.

Parrot bills its Average Demand rating as "the television industry's only global, cross-platform, country-specific demand measure".

The metric is based on 'demand expressions', which are expressions of demand identified on streaming platforms, media platforms, sharing platforms, blogs and micro-blogs, fan and critic rating platforms, wikis and information sites, peer-to-peer protocols, and file-sharing platforms.

The demand expressions are country-specific, numerical representations of the overall demand for titles in local markets. These are then tallied to create a demand ratings of between 0 and 100+.

The first eight episodes of *The Walking Dead's* sixth season broadcast in the Q4 2015 period, with ratings often slightly lower than for the corresponding season's five episodes. The 13-odd million average viewers it took were still some way ahead of all other TV shows in the US.

The second eight debuted on February 14, sending Deputy Sheriff Rick Grimes' motley crew of survivors in post-apocalyptic America towards its biggest and most dangerous battle yet, with a number of key characters from Robert Kirkman's comic book series introduced.

Crunching the numbers, *The Walking Dead's* average Demand Rating was 81.05 across the 54 territories covered in the Parrot research. HBO's *Game of Thrones* was second with 73.32, while *The Big Bang Theory* was third with 70.96, making it the most popular comedy.

American Horror Story (originally broadcast on FX in the US, had 66.11), *Fargo* (FX, 62.62), *Fear the Walking Dead* (AMC, 61.43), *Mr. Robot* (60.54), *Orange is the New Black* (Netflix, 59.61), *Empire* (Fox, 57.68) and *Blindspot* (NBC, 55.21) rounded out the top ten most popular shows internationally.

The question of why *The Walking Dead* – which stars Andrew Lincoln, Norman Reedus and Lauren Cohan among others – remains so popular around the world is a matter of opinion, and one that for Ed Barton, practice leader for TV at media research house Ovum, is not easily explained.

"*The Walking Dead* is one of those shows that actually goes against the received wisdom of what works with audiences: it's a relatively niche genre with an unremittingly bleak theme and barely any recognisable actors," he says.



"It's down, of course, to the creative talent behind it, and also to the skill of AMC in spotting a great show, and then staying out of the way of the people making it. Scratch beneath the service and *TWD* is actually a complex, sophisticated and character-driven story that eschews conventional TV drama storytelling."

Commissioning the now-acclaimed *Walking Dead*, *Mad Men* and *Breaking Bad* has "propelled AMC on a journey from a little known US cable channel brand to global recognition with a cachet approaching HBO", Barton adds.

"It's reassuring in many ways because the strategy is basically 'make great shows and the ratings will take care of themselves' – these are all shows which many a rational programming exec would look at and think just cannot work," says Barton. "It is the opposite of algorithmically-driven, or checkbox commissioning.

"*The Walking Dead* has also achieved more than just raw viewership, the level of commitment, dedication and engagement *TWD* fans display is incredible. Social media activity, discussion, even 'meme-generation' volumes are reminiscent of other fan favourites like *Blake's 7* or *SpongeBob*. *TWD* isn't just a show anymore, it's a phenomenon." **TBI**



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DHX Media president Steven DeNure explains why the independent kids broadcaster, producer and distributor has created television's newest studio

DHX tries out the studio system

With a new producer in the fold and a production workforce numbering 900, DHX Media is bringing all of its programme-making capabilities into one unit, DHX Studios.

The acquisition of *Slugterra* producer Nerd Corps for C\$57 million (US\$42 million) in late 2015 was the catalyst for the reorganisation of the production side of the business, says DHX president and COO Steven DeNure. "About a year ago we acquired Nerd Corps and that brought in Asaph ['Ace'] Fipke as chief content officer and Ken Faier as general manager for kids and family," DeNure says. "We decided to consolidate control of the creative side of the business under the team led by Ace and Ken."

Prior to DHX Studios' creation under that leadership DHX had a number of production units reporting to DeNure, including separate studios in Halifax, Toronto and Vancouver. Now, Fipke and Faier report to him and oversee content creation. There is also physical consolidation underway, with a 60,000 square foot studio being created in Vancouver for hundreds of production staff.

The team under Fipke and Faier includes Kirsten Newlands, who was running the Vancouver animation studio and has become senior VP, animation production, to work on shows such as *Dr Dimensionpants*. Phillip Stamp, who ran the Halifax studio, becomes VP, current production, while other changes see Logan McPherson take the vice president, creative, animation production role, and Tracey Jardine vice president, live action.



Not all DHX projects, however, will come from with DHX Studios – *Teletubbies*, *Hank Zipzer* and *Topsy and Tim* are among those made elsewhere – but the idea is to be able to make 2D and 3D animated shows, digital content and live-action under one roof.

"We're taking the two studios in Vancouver and the people in them and putting them all in the new facility. The vision is to have a creatively-led studio with a production capability across any genre of kids content," DeNure says. "And this means we can centrally coordinate those efforts."

Part of the need for such a comprehensive production capability is that

DHX has to service four kids specialty channels in Canada after it bought the Family Channel, Disney Junior and the English and French-language Disney XD nets in 2014, subsequently rebranding the latter three as Family Jr., Family CHRGD and Têlémagino respectively.

DHX later let a deal with Disney for content for the channels lapse, and that programming was swiftly picked up by rival kids channel operator Corus Entertainment, which launched a local Disney Channel



that sits alongside its YTV, Treehouse and Nickelodeon brands. The upshot is the DHX channels need to fill the gap left by Disney. DHX Studios is one way of doing that (in addition to making shows for other channels). "Without Disney on Family we have a bigger appetite for content, and not only programming from DHX Studios but from other Indies; Canadian and international," DeNure says.

What DHX didn't know when it agreed to pay Disney C\$170 million for the channels in 2014 was that Canadian regulators would rip up the rule book regarding how channels are bundled after the extensive Let's Talk TV consultation. Operators are now effectively made to offer channels a-la-carte. The fear among content companies is that amid the uncertainty these changes have created, channels will freeze commissioning plans.

"These are valid concerns," says DeNure. "There is uncertainty as to what 'pick and pay' will look like, and uncertainty means people put off decisions. But we need content, and we are not seeing that slow down – Family Channel has probably had its biggest ever year."

In terms of content coming out DHX, and more specifically DHX Studios, the company has just struck a deal with Mattel and will, as part of a wider agreement, reboot the toy giant's Polly Pocket property.

The *Cloudy with a Chance of Meatballs* series, based on the Sony Pictures Animation movie franchise and ordered by Teletoon in Canada and Boomerang internationally, will also come out of DHX Studios. The development slate includes the animated adaptation of the George Greenby books by physicist Stephen Hawking and his daughter Lucy.

After a busy period of M&A, will Toronto-listed DHX now enter a phase of consolidating its assets and focusing on organic growth? DeNure says: "The company continues to be very ambitious and we are constantly looking at things in the business. It is safe to say there will be other opportunities." **TBI**



True Crime Programming

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Serialised killers

Killing Fields

A new wave of true crime series that ape the structure of serialised dramas has emerged on screens across the world. Jesse Whittock looks for evidence from those behind the shows to build a case for why it's happening

Has there been a more talked-about genre than serialised true crime programming in the past year in international television? Newspapers, websites and blogs have devoted thousands of column inches to the stories and theories around Netflix's *Making a Murderer* and *The Jinx: the Life and Deaths of Robert Durst* from HBO, while friends and work colleagues spend hour upon hour discussing the minutiae of the cases presented. Meanwhile, the second season of podcast *Serial* was the medium's biggest ever launch.

Channel acquisitions executives are no less enamoured, evidence suggests. "Broadcasters sit up the minute they hear *Serial*, *The Jinx* and *Making a Murderer*," says Paul Heaney, founder and CEO of crime specialist distributor TCB Media Rights. "I'm passing that information back to producers."

The intel is clearly making an impression. "True crime and blue flashing light stories have changed," says Neil Grant, managing director of Ten Alps-owned UK indie Films of Record.

Grant is the executive producer on *The Murder Detectives*, a three-part serialised documentary

for Channel 4 about the murder of Nicholas Robinson in the English city of Bristol. Told from the perspective of the officers investigating the killing and the 19-year-old student's family, the show is a clear move away from the classic tropes of true crime programming, as seen on channels such as Investigation Discovery and Crime + Investigation.

"*Serial* had come out by the point I had the idea, but I was specifically influenced by *Death on the Staircase* [aka *Soupsçons*, a 2004 courtroom docuseries from Jean-Xavier de Lastrade]," says Grant. "I'm quite well



The Jinx



The People v. O.J. Simpson: American Crime Story

known for my ob-docs, but I wanted to do something different and had an ambition to do something bold and risky, something that could open up the stylings [of something like *Soupsçons*] to a very different audience.

“Channel 4 supported the idea of an ob-doc with drama narrative arcs, shooting and music,” he adds. “We approached it as a drama, which was much more attractive to that different audience; they could have been bored with this

type of programming in the past. It was a big risk for all involved: we didn’t know if there would be a murder, whether we would be able to get consent from the family. We had no idea.”

Grant points to the “visceral storytelling” of *Making a Murderer*, the ten-part Netflix doc series that resulted from a ten-year investigation by filmmakers Laura Ricciardi and Moira Demos into the incarceration of Steven Avery, as a key element of serialised crime stories. This

is an issue for commissioners.

“Productions like *The Jinx*, *Serial* and *Making a Murderer* are a labour of love, and don’t come about very often,” says Koulla Anastasi, head of acquisitions and commissioning for the UK feed of A+E Network’s Crime + Investigation channel. “I have been pitched dozens of serialised pieces, but I have to ask if they can carry the story for ten parts.”

That said, Anastasi, says the appetite for “premium and high-quality” documentary projects is evident, and that “there’s absolutely an appetite for serialised pieces”.

“We have spent a lot of time talking about this zeitgeist moment true crime is having,” she adds. “There might have been a guilty pleasure element to it in the past, but now the genre has opened up and is acceptable. It’s now on us to respond.”

On January 5, Discovery Channel made its play in the serialised true crime space, debuting the Sirens Media-produced series *Killing Fields*. Tom Fontana, who adapted David Simon’s classic true crime book *Homicide: A Year on the Killing Streets* for NBC in the 1990s and created HBO prison drama *Oz*, is an executive producer.

The series follows a pair of detectives in real-time, one who comes out of retirement, investigating the unsolved murder of Louisiana State University graduate student Eugenie Boisfontaine in 1997, and whether this was linked to the disappearance of about 60 young women around the city of Baton Rouge.

Discovery Channel’s executive producer on the show, Joseph Schneier, says the commission came after Rich Ross signalled the US cable net would shift away from heavily-formatted unscripted programming and into more experimental areas.

“Sirens came to us with the pitch, and at the same time Rich Ross was talking about expanding the brand,” Schneier says. “Discovery Channel was in crime years ago, but had moved away. Rich asked the question, and at that point *The Jinx* had come out but only had a small audience. *Serial* had also come out, and with Rich Ross’s blessing we started looking at the crime space.”

Schneier notes that the epic landscapes of Louisiana were in-keeping with the more classic wildlife and natural history programming on the Discovery Channel. More significantly, the show was shot and edited in real-time – the case investigated between episodes each week.

This can create exciting possibilities for producers. “One of the neat features of editing and shooting at the same time is people come out of the woodwork; tips will flow in long after the cameras shut off,” says Schneier.

Overall, *Killing Fields* was “a big undertaking, as it was a show for an audience that didn’t quite know the format yet”, adds Schneier.

Killing Fields delivered Discovery good ratings, and while Netflix steadfastly refuses to offer audience figures, *Making a Murderer*’s cultural impact is clear for all to see.

Investigation Discovery even got in on the *Making a Murderer* act, coproducing *Front Page: The Steven Avery Story* with NBC News-owned Peacock Productions, a doc that refuted parts of the SVOD show and offered new evidence.

The network’s first scripted effort, *Serial Thriller*, also pays homage to the long-form true crime genre by running over three parts. The series, subtitled *Angel of Decay*, was about prolific murderer Ted Bundy. That was followed with another, *Serial Thriller: the Chameleon*, based on killer Stephen Peter Morin.

Another true crime drama, *The People v. O.J. Simpson: American Crime Story*, handed US cable channel FX its highest ratings for a scripted original in the network’s 22-year history in February.

Film-stars such as John Travolta and Cuba Gooding Jr. featured in the ten-part series, which many commentators said was a reflection the recent impact of serialised true crime.

Cultural impact is one thing, but All3Media International head of acquisitions Maartje Horchner claims serialised true crime poses distributors and channels more practical problems on launch.

“This new factual will deliver the ratings, but will not deliver the volume, and it needs a launch like it’s a drama,” she says. “As a distributor you have to put in much more effort to make people understand what it is; buyers’ views are becoming blurrier and blurrier.”

Netflix had this in mind when it launched *Making a Murderer* by launching the first episode concurrently on streaming website YouTube to drum up interest in the project.

Meanwhile, both Horchner and Films of Record’s Grant point to the rise of high-end television drama as a key element in the development of serialised true crime programming.

“I’m not sure there’s necessarily more demand for it [than regular true crime],” says



Horchner, though this view contrasts with that of Mike Lolato, senior VP, international distribution at US-based GRB Entertainment.

“I don’t think this is [just] a trend,” he says. “There’s so much interest that I think this has become a new genre. There are so many more stories to tell.”

GRB was in Miami in January launching its own effort in the developing canon. *Nelson Serrano: I’m Innocent* was originally created as a one-hour documentary, but the plan is to expand the story.

“We realised that like *The Jinx* and *Making a Murderer* there was more to it – there was injustice,” says Lolato. “The producers have additional footage so, when the conversation came up, it was clear it would 100% lend itself to a serialised show.”

The programme follows the case of Serrano, an Ecuadorian-born American immigrant accused, and later convicted, of murdering four people in Florida in 1997.

The case against Serrano is considered by many to be weak, and there have been questions of the legality of American authorities deporting him from Ecuador back to the US to face trial.

“In a very short period of time, this type of content has made an impact on a genre that has been popular a very long time,” says Lolato. We’ve seen it with *Serial*, *The Jinx* and then *Making a Murderer*. The content is the same, but presented differently and in premium slots. We have got a whole different generation watching on Netflix, people who are against injustice.”



Ultimately, true crime’s zeitgeist moment leads back to NPR’s podcast series *Serial*. “What it has done is attract a younger-skewed audience who might not otherwise come to this sort of programming,” says Films of Record’s Grant.

Or, as Discovery’s Schneier puts it: “*Serial* definitely jump-started the interest in true crime. Crime for the most part is past tense; *Serial* was talking about something in the past, but in a new way. It’s a different way of approaching the material, and that is the interesting thing for me. It’s different from the usual true crime pattern.” **TBI**

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Billions

Having worked at Sky's pay TV platforms in the UK, Italy and Germany, Gary Davey is now the content boss for the Europe-wide Sky operation, which spans each of the aforementioned territories, as well as Ireland and Austria. At NATPE in Miami he was quizzed by Stewart Clarke on his programming plans for Europe's largest pay TV operation, and its 21 million customers

Sky's programming *Billions*

TBI: Sky is now a 21-million subscriber operation across five European territories, which must mean there is a lot more you can do in terms of programming?

GD: Our development process is starting to mature, so in 2016 we have nine scripted shows returning. That's an important sign of that maturity. We also have five of our shows this year on TV in the US. It's taken us along time to build up to the point we are at now. The Sky originals are designed to sit alongside our HBO, and now Showtime programming, so [our output deal with Showtime] was, in a way, the final piece of a puzzle.

TBI: You mention the programming deal with CBS for Showtime content such as new drama *Billions* on Sky Atlantic in each country you operate in – why do that?

GD: We've been buying Showtime programmes through CBS Studios International for quite a long time, and the channel has a unique type of programme like *The Affair* or *Ray Donovan*, which I think take TV to a slightly different place.

There's a certain quality and edginess to those programmes that is absolutely perfect for our Sky Atlantic brand.

TBI: In terms of acquiring programming, do you now want rights across the whole of Sky's European footprint?

GD: It varies from genre to genre. The Sky Atlantic brand works in exactly the same way in the UK, Italy, Germany, Austria and Ireland, and that's a testament to how well defined that concept is. It works brilliantly everywhere and that's why our Showtime and HBO deals are single agreements across those markets.

TBI: We have heard Netflix say that distributors aren't geared up to sell on a global basis. Is it a challenge to buy rights across multiple territories?

GD: I hear a lot of conversations recently about 'the global buy', but it is not as common as a lot of people think because there are many complications in a world where you have big existing deals between content companies and free-to-air commercial TV companies.

I said to someone the other day that the only ways you can have a global deal is if you made the show, or, quite frankly, if it's not worth having. If there is a show of enormous value, the owner of that copyright is going to exploit it to its optimum by auctioning it in [separate] territories.

TBI: Now Sky is a combined European operation can you create original content centrally for each of the individual platforms?

GD: I think the day we try to centralise creativity will be the end of us. Content has to have deep local roots, and an idea that will work locally. Then the development process starts. We all get together very regularly and identify projects that have potential, and that's when we start the supercharging process. That's when we put incremental development funding in, and extra people and support. That's when the project goes international.

TBI: What can we expect in terms of volume, how many big dramas can Sky produce in a given year?

GD: There are different layers. The international layer with the big international coproductions. Then there is a Sky Europe layer where we are producing shows that work across the UK, Germany and Italy, and then there is a purely local layer.

In all markets we like to launch something new every month. So assume there are twelve big projects a year and say half are international. That's the kind of model we are looking at: six international and six local in each territory.

TBI: And will you fully fund these, or will you always seek coproduction partners for the big projects?

GD: Each project is different. We have our own distribution company, Sky Vision, which is there to behave like an independent coproducer. Sometimes they will love a project and would like to be able to control the international rights, and they will put money on the table as an independent distributor.

TBI: But with that integrated model, won't producers be concerned they need to give up rights to get a Sky commission?

GD: We will never let the tail wag the dog. In other words, the motivation is to serve the customer, not to run a profitable distribution business. If we can do both that's great, but the primary focus is the customer; that is the mindset, the DNA of the organisation.

If we want to do a project and we have to give up international distribution that's perfectly fine, and we do it all the time. We would prefer to have the international rights, but we don't insist.

TBI: There is a school of thought that there is too much drama. You have a lot of data and insight into how customers are consuming content. Are we reaching a tipping point?

GD: Based on the behaviour of our customers I think the appetite is insatiable. I guess there may be an end to this at some point in the future, but I can't see it yet. We're investing heavily and will continue to do so.

"The day we try to centralise creativity will be the end of us. Content has to have deep local roots, and work locally"
Gary Davey



TBI: Sky recently unveiled its next-generation Sky Q service with a lot of fanfare. How does that impact what you do?

GD: We think about the business in tiers. The big middle tier is the Sky+ product, Now TV is a cheaper, more flexible and smaller product. Sky Q is a super premium tier, and is a technology that is unique in the world.


TBI: What does that mean in terms of content?

GD: We are thinking these [tiers] are very different experiences, and maybe the content will be different on each one. On Sky Q we are doing things we have never done before.

We are experimenting in the world of shortform content and are partnering with 19 different multichannel networks to deliver shortform from them seamlessly into the home.

It's not there to replace YouTube because anyone who's into YouTube will use YouTube. But for the curious who like the comfort of the living room we're delivering that experience. That's one of many different things we are going to experiment with in terms of creating unique content for unique customer experiences. **TBI**

Will VR rock in 2016?



Virtual reality is the talk of the town, with new hardware and a proliferation of apps and experiences launching this year. But what is the business model? Can VR deliver on the hype? How can content companies make money in the fledgling medium? Stewart Clarke dons a headset and finds out

Analysts are divided as to whether 2016 is the year virtual reality takes off, or how many of the new high-end headsets will make it into homes. What is clear is that content companies are placing a bet on the immersive tech.

Franco-German pubcaster Arte, US cable net Syfy and Discovery Communications are among the channel operators getting involved. Netflix and Hulu have launched apps, while content companies including Barcroft TV and Atlantic Productions are making content for VR platforms.

Research by Futuresource Consulting in the US suggests the content that people want most in VR is movies and games, with 39% of consumers sampled interested in experiencing movies, 38% in gaming, and 26% in experiencing VR sports.

Ahead of real-world testing, however, what counts as compelling content remains a moot point. Phil Birchenall, projects director at content trend specialist K7 Media argues that there has to be a very good reason to use VR.

“We need to move away from the idea that using VR will be ‘just another way of watching TV,’ which is a huge misconception,” he says.

“I’ve seen tests by broadcasters in which they’re just using VR-enabled cameras to shoot a presenter delivering a piece to camera, and that’s not a compelling use of the technology. You have to think about why you’re using a camera in VR, rather than just deciding what to point it at.”

Conceptually, consumers and content companies are undoubtedly fascinated. “VR captures the imagination more effectively than almost any technology from the last two decades, but there is a question about what sort of content will work and engage the consumer,” says Ampere Analysis research director Guy



Jaunt's *The Paul McCartney VR Experience*

“Our content comes from partners, but we’ll do some original content this year.”

One of Jaunt’s partners is UK-based Barcroft Media, which runs online channels, and produces for these as well as for linear TV. It will make exclusive content for the Jaunt app after meeting the VR company at MIPTV in 2015. “Immersive 360-degree VR is a whole other creative plane, and a new opportunity to tell stories,” company founder Sam Barcroft says. “But there is a big caveat: no-one has cracked factual in VR in terms of the format. It can be quite full-on, and my first impression is that shorter experiences are more valuable than long ones.”

Facebook and YouTube started supporting 360-degree video last year, and that is where some of the TV players have started their journey to full VR.

Publicly-funded Arte started on its *Polar Sea 360* project in 2014 (before Facebook’s 360-degree player was even launched), as a way to present climate change information in a new and engaging way. It is now looking at getting 360-degree content direct to smart TVs, although it is bandwidth intensive.

The early takeaways from *Polar Sea* included the benefits of real (over CG) images in 360 and VR worlds, says Arte transmedia boss Kay Meseberg. “I saw that real pictures had much more impact than artificial ones; real pictures captured the 360-degree impact much better, and there is a bigger ‘wow’ effect.”

Arte has now launched a full-fledged VR app that, as TBI goes to press, has been downloaded 25,000 times. It has a range of content, with *Edge of Space*, a 42km balloon flight experience to the edge of the earth’s atmosphere, the most popular. It was created specifically as an immersive experience, but Meseberg says most of its VR content will relate to an Arte TV show.

New content will be added to the app once or twice a month, and the first scripted offering is about to be added. Philip K. Dick-inspired *I, Philip*, from Okio Studio and St Georges Studio, follows a human-like android called Phil. Arte’s app is free and as a pubcaster its *I, Philip* content will be too, but there will be a paid-for Gear VR app launched by the producers.

Immersive entertainment is, however, just one application of VR and numerous other possibilities exist across fields including healthcare, military training, architecture, engineering, travel and retail.

News and sports are also obvious categories

Bisson. “I’m surprised by the interest and hype, given what happened with 3D. It faces some similar issues to 3D, and a VR headset is considerably more intrusive than a pair of passive 3D glasses. But it is more than hype, and serious players are investing real money into the likes of Jaunt.”

Comcast and Time Warner have invested in VR live-event specialist NextVR, and Disney, ProSiebenSat.1, Sky and Participant Media all contributed to a funding round for Jaunt, the end-to-end VR company that creates cameras and VR tech. It is also working up VR content through its Jaunt Studios division, which is helmed by

former Lucasfilm CTO Cliff Plumer.

It plans to launch a VOD VR service this year. “We’re working with brands that want to be involved with good stories, and these are the early sources of funding for content,” Plumer says. “But we’ll be launching more content this year, and testing whether people will pay US\$3 to US\$9 to download an episode or series.”

The content on the Jaunt app is mostly factual thus far, but it is working with an as-yet-unnamed Hollywood director on an original scripted project, which will likely comprise short eight-to-ten minute episodes for download.

“We’re definitely ramping up,” Plumer says.



Eurosport's Bode Miller 360° Virtual Reality Journey

for VR experimentation. Sky News in the UK has prepared a VR report on the migrant crisis in Europe, while in the US, ABC News launched a dedicated VR app that was used to take viewers to Syria and North Korea. CBS used VR in February for its news correspondent's behind-the-scenes report about an unmanned mission to Mars, with the footage added to the Jaunt app.

Discovery-owned Eurosport has also been testing the medium, with the idea of transporting sport fans to iconic locations or circuits. It worked with ski legend Bode Miller on its first VR video, part of the wider Discovery VR app, and posted it just before a World Cup skiing competition taking place on the same course featured.

"Skiing fans could feel what it would be like to clip into Bode's skis and race down the Birds of Prey course in Beaver Creek," says Arnaud Simon, Eurosport's senior VP, content and production. "For each VR experience it is our ambition to work with passionate, high-profile athletes, and shoot the footage at iconic locations such as the Birds of Prey course or, say, cycling's Mont Ventoux."

Boxing matches such as the short-lived

(130-second) David Haye and Mark de Mori fight in January have also been captured in VR, with IM360 making a dedicated app for that bout.

K7's Birchenall cites Discovery VR as one of the apps getting it right. "It is a perfect example of VR being used to add a dimension to content that you'd be unable to without the technology," he says. "The app showcases specially shot VR content that accompanies Discovery properties such as *Mythbusters*. So, rather than adopting a whole show for VR, it's adding something genuinely interesting at a point where VR becomes appropriate."

Most analysts agree that gaming will be the early driver of uptake of high-end VR headsets. Nintendo is reportedly interested, while Sony's PlayStation about to enter the fray with PlayStation VR (fka Project Morpheus). A Trojan horse effect, of getting headsets into homes that can then be used for different applications beyond gaming, is thought likely.

So far, however, mass-market VR is mostly a low-end experience via Google's Cardboard viewer. Google shifted five million Cardboard units between launch in June 2015 and mid-January of this year, but the low-end system

can't deliver the head tracking and advanced features of its high-end peers (although expect updates at the tech giant's I/O developer conference in May).

Samsung has launched its Gear VR system, which is powered by Facebook-owned Oculus and needs a Samsung smartphone. However, the reason shows such as CES were abuzz with VR gossip and news was that this is the year HTC's Vive, Oculus Rift, and Sony's PlayStation system will also roll out, meaning an array of options at the high end of the market.

Analysts at Ovum expect 15-20 million lower-end Cardboard-type devices in the market by end-2016, and about six million higher-end headsets. "That means VR is no longer in start-up world," says Ovum's Paul Jackson, practice lead, media and entertainment. "This is a landmark year because of the high-end headsets that are coming out."

A VR report from NATPE and the Consumer Electronics Association, meanwhile, underlined a chicken-and-egg dilemma in VR, whereby content companies want an idea of how they get a return on their investment, while a lack of content potentially hampers sales of headsets.

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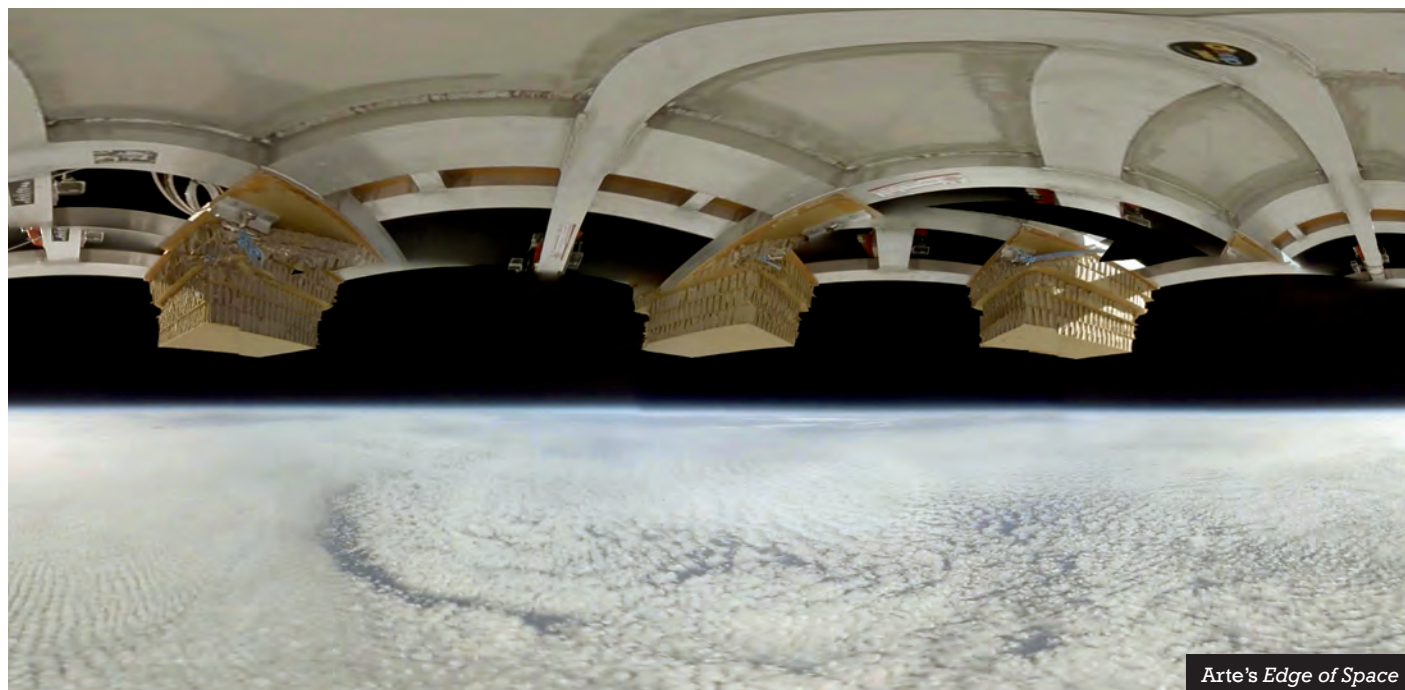
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Arte's Edge of Space

The report cited significant hurdles to overcome before VR becomes mainstream, “the largest of which is likely the lack of a sustainable model for the creation of content and a clear pathway to monetisation”, it said. “There are also concerns that there will be a lack of quality content once consumers have the hardware in their hands due to cautious investment in content at this beginning phase.”

Anthony Geffen, boss of UK independent producer Atlantic Productions, sees an issue with what can be made, versus what should be made. “There’s a huge problem coming,” he says. “Everyone is buzzing about the new technology and shooting the heck out of everything, but people want proper stories.”

If there aren’t enough good early experiences the risk is people will say the reality does not match the hype, adds Geffen. “I predict that in six months at MIPCOM people will say there have been few VR successes, and the bubble has burst,” he says. “But the truth is VR is here to stay, in different levels and different places, from apps to institutions.”

Atlantic was one of the first content companies experimenting with VR, and has set up Alchemy VR, which has collaborated with the Natural History Museum in the UK to create *David Attenborough’s Great Barrier Reef Dive*, an experience that takes people underwater with the renowned naturalist. Alchemy had the assets from Atlantic-produced BBC doc *David Attenborough’s Great Barrier Reef*, and also used Jaunt’s system to capture footage. Also coproduced with the Natural History Museum and Attenborough is *David Attenborough’s First Life*, using Samsung Gear VR headsets to look at the origins of life. Having played with eleven-minute and 20-minute formats, Alchemy says it will now look at a longer half-hour experience. In terms of the model, both were paid-for experiences priced at £6.50 (US\$9.40).

“As the VR world grows there will be app and online stores, you will be able to create your own experience, and people will download and pay for it,” says Geffen. “However, it is risk money for most people at the moment if you want to do production, because there is no established market.”

Currently, the best bet in terms of recouping investment is working with brands, or – like Alchemy – institutions, but over time a commissioning model is expected to emerge. There will also likely be ad-supported VR and

on-demand services and funding models.

Generating revenues is also the responsibility of content companies, K7’s Birchenall says, and they need to deliver content worth paying for.

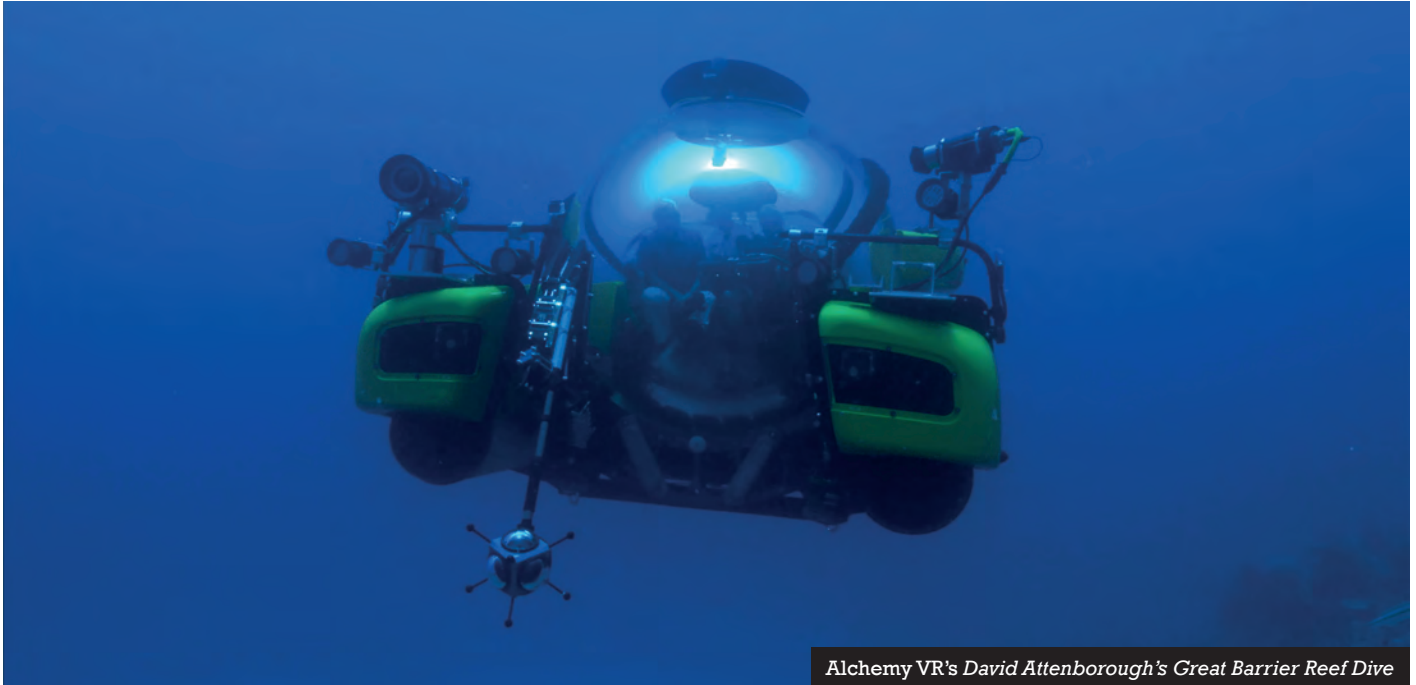
“The same rules will apply to VR as they do to content we consume currently,” he says. “If it’s an AAA console-style game adapted for VR such as *Alien: Isolation*, we’ll pay top dollar. If it’s a piece of ancillary content to support a documentary, why should we pay? With Hulu and Netflix both launching apps for VR headsets at the end of last year, it’s clear that subscriptions will form part of the monetisation mix too.”

Marketers certainly see the potential, and novelty value, of VR. Disney and Google launched a *Star Wars* VR app ahead of *The Force Awakens* and more *Star Wars* VR experiences are in the offing after Lucasfilm’s special effects business, Industrial Light and Magic, created the ILM Experience Lab (ILMxLAB) to experiment with the medium. *The Martian* also had a pre-launch VR app as movie studios wake up to the promotional power of the medium.

Small-screen sci-fi content also lends itself to VR, and NBCU’s Syfy cable net launched immersive and multiplatform unit, Syfy Labs, in January. Syfy had already teamed with tech firm IM360 and launched an app for Google Cardboard last summer based on its original series *The Expanse*, allowing fans to explore spaceships from the show. A Samsung Gear VR app duly followed.



Syfy's *The Expanse* - A 360° Experience



Alchemy VR's David Attenborough's Great Barrier Reef Dive

Google's viewer, while not offering the same level of experience as the high-end headsets, is cheap. Syfy gave away 13,000 Cardboard viewers at San Diego Comic-Con when it launched *The Expanse* app.

It was innovative marketing for the series ahead of launch, building anticipation and showing fans of the book what the TV show would look like in the process. "A lot of fans had only ever seen the books visualised in cover art, so this showed them we were remaining true [to the spirit of the novels]," says Matthew Chiavelli, senior VP of digital at Syfy. "And because of the timing, last year, there was also a novelty aspect to VR, although I don't know how long that will last."

Internationally, Syfy has *Halycon*, an upcoming drama commissioned for linear channels and for VR devices, about a virtual-reality-obsessed future world.

The US Syfy is now looking at more guided, narrative VR content "It's the next step, and no-one has cracked it yet. It is a whole new way to think creatively: the director can't decide where the viewer looks or what they focus on," says Chiavelli.

Another obvious but important difference with creating VR, is that TV and film directors are used to shooting what is in front of them, whereas shooting with a 360-degree camera requires everyone out of the scene. One trick is to have the director as an extra, says Jaunt's

Plumer, allowing them to be in the action without ruining the shot.

"People producing content for film, TV or digital are naturally curious to explore VR," he says. "They can leverage a lot of techniques from those fields, but there is also a whole new language to learn."

"The skills needed for VR are different to those used today to capture and edit video," adds Ovum's Jackson. "It is difficult, for example, to cut between cameras, and you can't fast-cut."

Mounting the camera on either side of an athlete's body, or on an accessory, is a solution in sport, according to Eurosport's Arnaud Simon. "Some sports lend themselves better to this, but even when it is more challenging we are able to find solutions," he says. "For the Bode video, the Eurosport team developed a special 3D-printed rig to fix the camera to his ski pole."

Once filmed, getting content on all platforms, from Facebook and YouTube to Cardboard, and the soon-to-launch high-end headsets, is relatively easy, and content companies understandably want their wares available widely.

"There are two different uses of the technology: the high-class headset experience at one end and the 360-degree video on YouTube and Facebook at the other," says Sam Barcroft. "We want to do both; we want the large scale recognition at one end, and the reputational benefit at the other."

For the Facebook and YouTube end of the market, Barcroft is working with photographer and British 360-degree filmmaker Drew Gardner, who will make a series of short-form docs for the Barcroft TV channel on YouTube, and for Facebook. The first one, *Child Climbs Historic Human Tower*, will follow an attempt to build a 600-person human tower in a Catalan market square.

With cameras and tech readily available and several new headsets adding to those already in the market, is 2016 the year VR will become a mainstream consumer proposition?

In terms of cold, hard cash it's unlikely. Futuresource forecasts that the global spend on virtual reality video and games content will be just US\$79 million this year. As the array of content to buy grows it projects that will rocket to US\$8.3 billion by 2020, making VR a medium-, and certainly not a short-term, play.

In content terms, Arte's Kay Meseberg highlights a key challenge for the industry. "The chase right now is to find the content that defines the VR category," he says. "To do for VR what *Snow White* did for animated film, or *Avatar* did for 3D."

Jaunt's Plumer agrees, and draws a Netflix analogy, noting VR has not yet had its "*House of Cards* moment", alluding to the show that helped define the world of streaming. "It's always driven by content," he says. "This is the beginning of a whole new medium." **TBI**

8, 9, 10,



Celia



Bajo el Mismo Cielo

Luis Silberwasser took charge of Telemundo in late 2014 and has set about revolutionising its primetime. The president of the NBCU-owned US Hispanic net talks to Stewart Clarke

Primetime in Spanish-language TV in the US has traditionally meant one thing: the lust, love, revenge and betrayal of the traditional telenovela. In an attempt to differentiate itself from chief rival Univision, Telemundo has tried to reimagine the Latin drama, giving it a local relevance, shorter runs, and tackling real-life issues in a grittier way than has been done before.

The recent *Bajo el Mismo Cielo* (*Under the Same Sky*) novella is a prime example of where Telemundo wants to take its 9pm dramas.

Produced out of the network's Miami studio complex, it follows an undocumented family who move from Mexico to Miami, with all of the trials and tribulations that brings.

"What we are trying to do is to be much more relevant to the Hispanic consumer that lives in the States," says Luis Silberwasser, the former Discovery Networks International exec who has been president of Telemundo since August 2014. "And because we produce our own content we are better placed to do that. Perla Farias [vice president of the telenovela development at the studio] is always thinking about how can we

make the story more relevant."

Silberwasser is keenly aware Telemundo's local production capability is one thing that sets it apart from Univision, which gets its scripted content direct from Mexican programming powerhouse Televisa. On his watch the studio has changed tack, and instead of churning out shows that look like those on Univision, has been tasked with delivering something new. Rather than play Univision at its own game and compete with the Televisa product head on, it has sought to offer an alternative.

"I think when you are a challenger like us,

Telemundo



El Señor de los Cielos

it is very hard, and Telemundo tried for a long time to do similar things to them and the track record was not that great," Silberwasser says. "When there is no real alternative people will always go to the default option. The key decision we made was to try to do something different: different genres in some cases, different production values and numbers of episodes, and introducing the concept of a series and things that can come back year after year."

Producing out of Miami means Telemundo can play with formats and programming in a way Univision cannot.

"Not only do we get all of the benefits of owning the rights, but the fact we can craft and create content based on what we know the

Hispanic audience in the US wants gives us a leg up," says Silberwasser.

The 10pm slot was the first in line for a change with the introduction of the 'super series', which are action novellas, often shot in Mexico and revolving around the drugs trade, that run to 60-80 episodes rather than the more traditional 120-160. The third season of super-series *El Señor de los Cielos* (*Lord of the Skies*) handed Telemundo the number one ratings position across all 18-34s in the US.

With 10pm given over to super series, Telemundo needed to apply the same thinking to other key parts of the grid. "We said, 'we have a good thing at 10, so the challenge is what do we do at 8pm and 9pm,'" Silberwasser says.

"Based on two pillars, original content and innovation, we knew what we were going to do had to feel and look different to what the competition is doing."

Bajo el Mismo Cielo will usher in more 9pm novellas with themes designed to resonate with Spanish speakers in the US. "*Bajo El Mismo Cielo* teaches us a lot," Silberwasser says. "It shows us that we can be more local, and take more risks with local stories. In the beginning we were concerned it might be too close for comfort, too real for the Hispanic viewers, but it wasn't."

The idea for 8pm is to have something lighter, so Telemundo will programme the slot with two types of show: musical biography-

dramas and romantic comedies. *Celia* fits the former category, telling the life story of Celia Cruz, a Cuban singer known as the ‘Queen of Salsa’. These shows will run to between 80 and 100 eps, shorter than a traditional novella.

As TBI went to press the overnights for *Celia* landed, and it had delivered Telemundo 1.75 million viewers, the network’s best performance at 8pm since 2012.

The overall 2015 primetime ratings were up double-digit, and Silberwasser says that advertisers are responding to the effort to differentiate Telemundo.

“There is tremendous interest from advertisers in terms of what we are doing because the ratings are there, but it is also conceptually strong,” says Silberwasser. “We have super series that come back in seasons, are shorter and more action-packed, and these are concepts the advertisers are very familiar with. It’s what they see from English-language television. Then we bring drama and music [at 8pm] – and they know what is happening with a show like [Fox’s big-rating hip-hop drama] *Empire* – and we can tie ourselves to that.”

If the Telemundo scheduling and line-up is starting to look more contemporary, and

Beyond primetime

If the focus is on original drama in the week, international content has a place during Telemundo’s Sunday primetime schedule, where *La Voz Kids* (*The Voice Kids*) is on air and the first version of *Big Brother* for US Hispanics, *Gran Hermano*, plays.

Silberwasser says the focus with originals “is on scripted, and with [entertainment] we rely on third parties and international producers”.

“It is working and we are happy with that,” he adds. “It brings credibility, reduces risk and the advertising community loves it because they know the name of the show. It’s an easier sell than a completely new format.”

The gaps on Sundays are for another child-related entertainment show, or a dancing format. “We’re committed to singing with *La Voz Kids*, and kids in general, and have been looking to see if there are any other formats where we can do something with them,” Silberwasser says. “We’ll see how *Big Brother* evolves,

that’s a different format for us. I would say other elements we are interested in are either more variety/reality, or something with more dancing that opens up that genre for us.”

Saturdays are tough with Univision’s *Sábado Gigante* (*Giant Saturday*) having dominated the ratings for 50 years. The other key challenges are getting the US election coverage right for the Hispanic viewers and, with the Olympics, Confederation Cup and World Cup in the offing, reinventing sports coverage for Latinos.

The American election will be centre stage on Telemundo, not least because issues around immigration from Mexico to the US are a political battleground. In keeping with doing something different to Univision, which is widely seen as close to the Democrats, Telemundo’s #YODECIDO (I Decide) initiative is a clear attempt to underline its impartiality. “We want to be more objective, to give the facts and interview both sides of the aisle, and let the viewers decide,” Silberwasser says.

The election plans tie into the strategy the network boss has set out of offering an alternative, rather than copying its chief rival.

“Sometimes we will do it really well and win and sometimes we won’t, but the investment in the studio, the writers and original content is something that will really differentiate us,” Silberwasser says. “Why should we have a studio and writers and producers to do the same thing the competition do – that doesn’t make sense.” **TBI**

“When there is no real alternative people will always go to the default option ... the key decision we made was to try to do something different”

Luis Silberwasser



little more like that of one of the English broadcasters, will it make the move to providing its increasingly bilingual audience with English-language programming? Not any time soon.

“Most of our viewers are Spanish-dominant and we will stick to what we know how to do best,” says Silberwasser. “More bilinguals are coming to Telemundo than before, but they are comfortable watching our super series and content in Spanish; they are not asking for it in English. We won’t be afraid if, in our super series or novellas, someone says something in English because they are in character – that’s OK and people can deal with that, whereas maybe five years ago it would have been heresy.”

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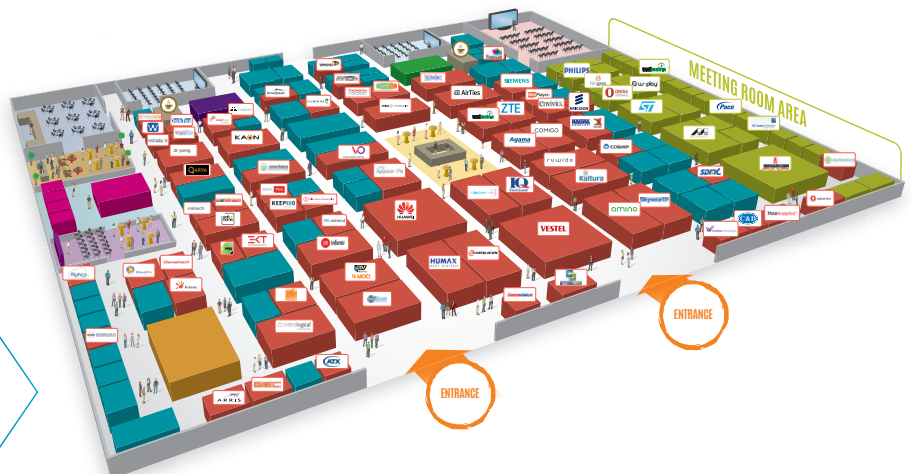
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THE SHOW: *Big Red: The Original Outlaw Racer*
THE PRODUCER: Red Craft
THE DISTRIBUTOR: All3Media International
THE BROADCASTER: NBC Sports Network
THE CONCEPT: Series following racing driver R.J. Gottlieb as he takes his classic muscle car across the US

Car formats are a big deal at the moment, with stalwarts such as *Top Gear* among the biggest shows in the world, and a glut of new offerings coming to market.

Among these is US series *Big Red: The Original Outlaw Racer*. Over eight parts it examines the legacy of the 1969 Chevy Camaro, one of the most iconic muscle cars in automotive history.

In the series, racing driver R.J. Gottlieb, drives the Chevy, which has a maximum speed of 230mph, across the US.

Big Red hails from US indie Red Craft, whose exec producer Josh Oliver says the inspiration for the show came from an article in *Hot Rod Magazine* that dates back over 25 years.

"It told the story told of an 18-year-old driver [Gottlieb] who had just completed a race in the deserts of Nevada, where he piloted the car to finish the race in first place, and averaged 200 miles per hour over a 90-mile stretch of open highway," he says. "The idea for a 'Big Red' Camaro documentary popped into my head, so I reached out to R.J. through his website."

Gottlieb duly replied, and with Oliver started work on the doc about his car and its legacy. At the beginning, *Big Red* had the makings of a vanity piece, or passion project. "I think that R.J. thought that we would simply be getting extremely beautiful shots of his car in various racing situations," says Oliver.

It turned into, however, a doc tackling bigger issues, Oliver says: "I saw something more and took a traditional documentary approach with the thesis: 'What compels a young man to risk life and limb to drive a car to such an extreme?' If the answer was 'the recklessness of youth,' then why would he still be doing it at age 40?"

Indeed, Gottlieb still races and *Big Red* draws crowds in any event in which it appears, meaning a ready-made audience of Camaro fans, and petrolheads in general.

The producers are also seeking out a more general audience while retaining the integrity motoring fans will demand. "When we started this project the number one goal was to be authentic, because it is the petrolhead that will

see right through us if it were not," Oliver says. "Additionally, we wanted to give the show a broader appeal, and when you watch the show it takes you places, it will give you thrills and chills down your spine, but you'll also come away with a little better understanding of the mechanics, science and technology that it takes to make a car like *Big Red* reach the speeds that it does."

Filming began in 2010, when the producers started tracking the story of the builder of *Big Red*'s engine, Larry Mollicone.

Oliver recounts the schedule thereafter: "Things got really serious starting in March 2011 when we took a new record at the Texas Mile, and following that we ran a harrowing hill climb road race in a historic silver mining town. This began an aggressive racing schedule that didn't slow down until late 2015 when we wrapped up season one of the show."

All3Media International picked up the rights to the series, which will be on the NBC Sports Network in the US. It will be a major launch at MIPDoc and MIPTV.

True crime programming is increasingly informed by the pacing, tone and production values seen in the scripted world, and DCD Rights' big launch for MIPTV is *Real Detective*, a new factual series inspired by HBO's hit cop drama *True Detective*.

Real Detective is a factual series heavy on the drama reconstruction, with up to 80% of each instalment scripted.

"This is a dramatised, but factual programme," says DCD Rights CEO Nicky Davies Williams.

"The whole [true crime] genre is growing, changing and getting closer to drama," she adds [see pages 12-14].

The show was produced by Montreal-based indie WAM and plays on cable net Investigation Discovery in the US.

DCD landed the rights after putting the word out that it was in the market for crime programming. "We were looking for crime and this really struck a chord," says Davies Williams, adding: "There are a lot of crime nets out there."

The DCD distribution boss also thinks the

series could go free-to-air in some places. "It could go to broadcast in Australia and Europe," she says. "In fact, it should go to free TV in many European countries."

Each hour-long episode is one police officer's story. Appropriately, a (retired) real detective opens each instalment, setting the scene and outlining a case from their career that haunts them. The key elements of the investigation are then re-enacted, with some star names cast as the investigators.

Reservoir Dogs and *The Hateful Eight* star Michael Madsen plays a Texas Ranger in one episode, for example, and *NCIS: Los Angeles'* Devon Sawa plays a cop who lets his ego get in the way of solving a case in another.

Other cases include *Falling Skies'* Ryan Robbins as Montana detective fighting to find a child killer, and *Lost Girl's* Zoie Palmer as an cop who gets too close to the family of a murder victim.

Davies Williams is confident that *Real Detective* will work for DCD. "You just know when you've got a hit," she says.

THE SHOW: *Wild City*
THE PRODUCER: Beach House Pictures
THE DISTRIBUTOR: TVF International
THE BROADCASTER: Channel NewsAsia
THE CONCEPT: Sir David Attenborough-narrated doc series on the wildlife of Singapore

Wild City is thought to be the first doc series to feature the narration of celebrated natural history broadcaster and expert David Attenborough that doesn't hail from the UK.

Harriet Armston-Clarke, head of sales at UK-based distributor TVF International, says Attenborough decided on his involvement because he was taken with the approach of the producer, New Zealand-based Beach House Pictures, and the ambition of the project.

Initially created as a two-part miniseries for pan-Asia network Channel NewsAsia, a third episode is in production, with Attenborough confirmed to voice it.

The show looks into the weird and wonderful wildlife of Singapore, one of the world's fastest-growing cities. Using modern blue chip filming techniques, it looks at how pangolins, crocodiles, monkeys and even the mudskipper fish have adapted to living side-by-side with skyscrapers and boardwalks.

TVFI picked up the show from Beach House through its Asia Pacific office, which is now manned by four staff and under the control of Will Stapley. "We have sold their show *Detox* [originally for TLC] to an eclectic group of channels already, and had been following this project for some time," says Armston-Clarke.

"It is classic blue chip factual – the sort of thing the BBC normally gets," she adds. "We get a high volume of blue chip factual from Asia now, but this is our first natural history programme out of the region."



THE SHOW: *Real Detective*
THE DISTRIBUTOR: DCD Rights
THE PRODUCER: WAM
THE BROADCASTERS: Investigation Discovery (US)
THE CONCEPT: True Detective-inspired true crime series with stars re-enacting real-life cases





THE SHOW: *The Clintons and the Obamas: Story of a Rivalry*
THE PRODUCER: Elephant et Compagnie, Chrysalide Productions
THE DISTRIBUTOR: Terranoa
THE BROADCASTER: France 5
THE CONCEPT: One-off doc examining the dynamic between the Clintons and the Obamas

Nicole Bacharan has been dubbed 'Miss America' in the French media for her commentary on transatlantic relations and US affairs.

The French academic, who has written more than a dozen books about US politics and social affairs (including 2014's *Secrets of the White House*), captured the attention of the French public when, in the wake of the September 11 attacks on New York, she said: "Tonight, we are all Americans", a phrase subsequently coined by French newspaper *Le Monde*.

Bacharan has now turned her considerable expertise to TV, co-writing *The Clintons and the Obamas: Story of a Rivalry*, a doc about the tumultuous relationship between the US Democratic Party's two most powerful couples. Fittingly, her co-writer was her husband, French journalist and author Dominique Simonnet.

Bacharan says the Obama-Clinton dynamic has fascinated her for some time. "It's a story I have followed closely for many years; this fascinating interaction between two power couples," she says. "It is the story of two couples,

and four larger-than-life individuals."

The film starts at the 2004 Democratic convention where Barack Obama's historic speech marked him out as a potential presidential candidate. The cameras captured Hillary Clinton's positive reaction, setting the tone for the first chapter in the relationship between the two. "We start the story then, when they first met publicly," Bacharan says. "It quickly became clear to the Clintons that this man might be their heir – the protégé to carry on their work, but after them."

The filmmakers also provide the backstory of each couple. "We have a flashback to how Bill and Barack got there," Bacharan says. "They are not from wealth, not Ivy League-born, and in each case the wife plays a huge role in what the husband achieves."

The one-off doc is divided into four parts. The first chapter, titled *Trust*, covers the 2004-2006 period during which Hillary sees herself as Barack's mentor. Chapter two, *Betrayal*, spans 2007-2009, when Obama declared he would run for president without the prior knowledge of the Clintons. The next chapter, *Compromise*,

covers how relations between the Clintons and Obamas were repaired, with Hillary becoming a loyal Secretary of State in the Obama regime. The final chapter is *Revenge*, in which Hillary is back and, like Barack Obama in the first chapter, running for president.

The 1x52mins doc, which will go out on France 5 later this year, is being made by French prodcos Elephant et Compagnie and Chrysalide Productions, with Paris-based Terranoa handling presales and sales.

With the US elections top of mind this year, the film provides an alternative to campaign-specific coverage, or a simple profile of Hillary Clinton or Barack Obama, says Isabelle Graziadey, Terranoa's head of sales and acquisitions.

"Our film is really the only one providing a character-driven story around two of the most charismatic presidential couples," she says. "It links together politics, morals, power, glamour and scandal."

Terranoa will have a screener at MIPTV, and an English-language version with, Graziadey says, an A-listing narrating.



THE SHOW: *Dogs Might Fly*
THE PRODUCERS: Oxford Scientific Films, GroupM Entertainment
THE DISTRIBUTOR: Sky Vision
THE BROADCASTER: Sky 1 (UK)
THE CONCEPT: A nationwide pooch talent contest to find a hound with the ability to fly a plane

Science meets dog training meets reality competition in Sky 1's latest unscripted effort, *Dogs Might Fly*. According to Niki Page, distributor Sky's Vision's head of acquisitions,

factual and factual entertainment, it is "popular science with real heart" and a "really unique experiment".

The format sees a dog behaviour expert, a scientist and a dog trainer find twelve pooches, rescued from dogs' home, to train for a number of difficult tasks over ten weeks in a building known as 'the Doghouse'.

The dogs are tested on everything from phobias, communication skills, memory and empathy as part of a process that will ultimately see the winner attempt to command and fly an aeroplane.

Page says the reality elements are in finding out about the dogs' backstories, and the emotional moments are the trainers' experiences with their canine friends.

"It's really sweet, and very emotional for the trainers, who have to send some of the rescue dogs back," she says, adding all featured have since been rehomed.

UK satellite channel Sky 1 launched the show on February 28. Ratings data was not available before press time, but Page is confident of finished tape sales as "there is a demand to meet" for costly popular science shows.

Because of branded entertainment investor GroupM Entertainment's involvement, rights to the show were initially up for tender. Sky Vision swooped, and is now launching the finished tape and format at MIPDoc.

"We have a lot of factual and wildlife at Sky Vision," says Page. "Oxford Scientific Films produced *The Secret Life of Dogs* for ITV, which was brilliant, so we knew this would be too. It ticks so many boxes for us, and it has never been done before. The relationship between the dogs and the people is the key."

Buyers should be keen to discover if man's best friend can conquer the skies.



THE SHOW: *Uncommon Grounds*
THE PRODUCER: Nancy Grace Productions
THE DISTRIBUTOR: Scripps Networks International
THE BROADCASTER: Travel Channel (US)
THE CONCEPT: Coffee expert Todd Carmichael travels the world discovering the best places to find a cup of joe

"Coffee and conversation has become a global phenomenon," says Hud Woodle, VP, programme licensing, international at US-based channels group Scripps Networks Interactive.

Woodle is referring to *Uncommon Grounds*, a new series for Scripps' thematic Travel Channel that's launching at MIPTV

this year. The eight-part series follows Todd Carmichael of Philadelphia-based coffee-roasting company La Colombe Torrefaction, who journeys round the world exploring coffee cultures.

"This is using coffee to introduce you to the local people," says Woodle. "Todd is not your usual Hollywood talent; he has worked in this

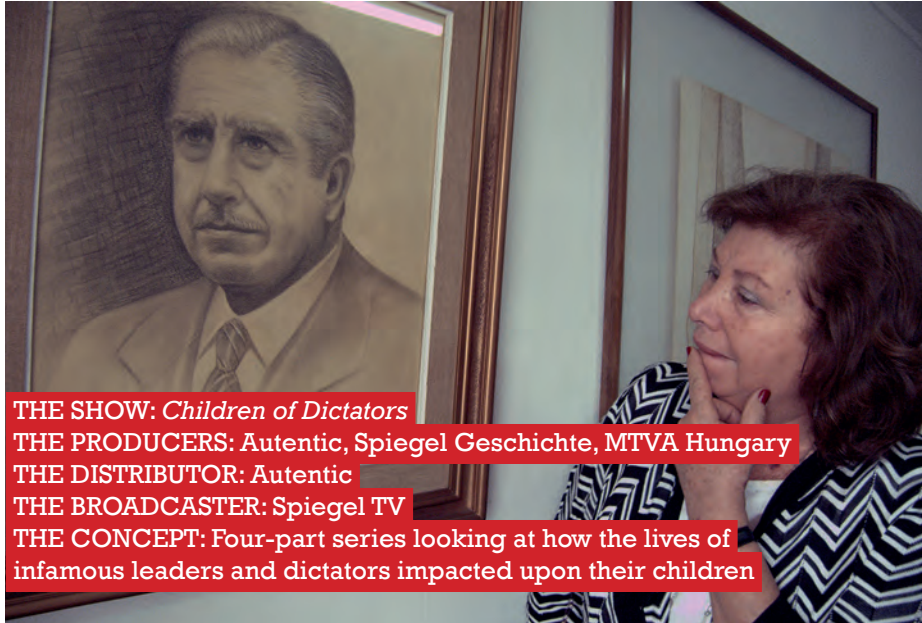
industry for 20 years."

Travel Channel viewers will be very familiar with Carmichael by now: he first featured in coffee-adventure-travelogue *Dangerous Grounds* and was then brought back for *Uncommon Grounds*, which debuted in the US in October last year.

Uncommon Grounds takes a more measured approach than its high-octane predecessor. Episodes take viewers to destinations including Reykjavik, Paris, Havana and Istanbul, meeting the local experts, industry personalities and baristas that contribute to the local coffee scene.

"The passion that Todd brings to the show, and the international locations are very good selling points for buyers around the globe," says Woodle, who adds that channels looking for human interest-focused factual should pass by the Scripps stand in Cannes.

Woodle also points to the quirky relationship of Carmichael and his cameraman 'Hollywood'. Audiences of a certain age may associate this with the interactions of the eccentric British celebrity chef Keith Floyd and his long-suffering cameraman Clive.



THE SHOW: *Children of Dictators*
THE PRODUCERS: Autentic, Spiegel Geschichte, MTVA Hungary
THE DISTRIBUTOR: Autentic
THE BROADCASTER: Spiegel TV
THE CONCEPT: Four-part series looking at how the lives of infamous leaders and dictators impacted upon their children

Children of Dictators has been on the radar of key executives for some time, having been pitched at MIPDoc last year. As the title suggests, it looks into the lives of descendants of some of history's most divisive leaders, and how their family names have impacted their

experiences and belief systems.

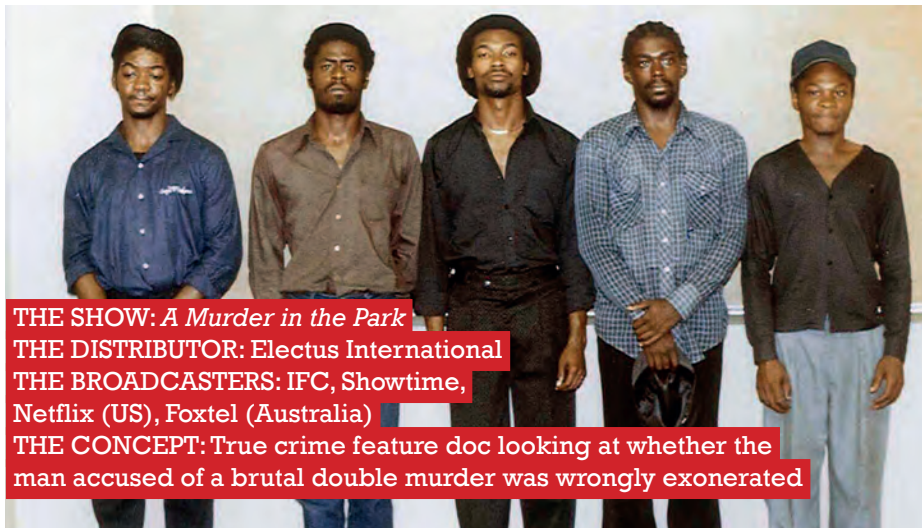
"Everyone is curious about these issues," says Anne Hufnagel, general manager of Germany-based distributor Autentic, adding: "There's always a need for historical content, and there's also a gap in the market at the moment."

The four-part series comprises episodes on the daughters of Chilean dictator Augusto Pinochet and Cuban Communist leader Fidel Castro, the son of Uganda's Idi Amin, and the great-niece of Adolf Hitler's second-in-command, Hermann Goering.

Filed without a crew by acclaimed Hungarian directors Eszter Cseke and Andras S. Takacs (best known for the *On the Spot* journalistic doc series), the hour-long episodes reveal how some refuse to accept the sins of their elder family members, while others have gone to extremes to leave that parts of their lives – and in one case genes – in the past.

"We're looking at the impact of these men on their families," says Hufnagel, whose company first became aware of the project at a pitching competition in 2015. "It has close access to their descendants and tries to explain to offer a deeper understanding of these feared leaders."

Hufnagel says the documentary will be hot property because it fills an ongoing need for history content. "It's quite expensive to make documentaries like this because of the archive material, and there's more demand than programmes produced," she adds.



THE SHOW: *A Murder in the Park*
THE DISTRIBUTOR: Electus International
THE BROADCASTERS: IFC, Showtime, Netflix (US), Foxtel (Australia)
THE CONCEPT: True crime feature doc looking at whether the man accused of a brutal double murder was wrongly exonerated

A Murder in the Park is the latest true crime offering to come to market, and is hoping to stand out in a crowded space.

The glut of real crime shows comes as viewers, and by association buyers, seek out something authentic and an alternative to heavily formatted ob-docs, says Electus International president John Pollak.

"A couple of years ago ob-docs were all the rage and channels still need them, but viewers

have got sick of not seeing authenticity," he says. "The true crime trend is a backlash against fake TV. *Serial* opened the door and re-ignited the genre, and [HBO series] *The Jinx* got everyone more interested. And then [Netflix's] *Making a Murderer* made it mainstream."

Electus' foray into the genre is *A Murder in the Park*, a feature doc from Shawn Rech and Brandon Kimber that was released theatrically last year. It then headed to cable net IFC before

an exclusive window on premium cable net Showtime. It will also go out on Netflix in the US. Electus has it for the rest of the world, and has already sold it into the Benelux region and to Foxtel in Australia.

The film looks at an infamous murder case that led to the State of Illinois abolishing the death penalty.

Anthony Porter was convicted of a 1982 double murder and sent to death row, before having his conviction overturned in 1999 after another man confessed to the crime.

A group of Northwestern University journalism students had helped build a case for Porter's supposed innocence in what was seen as a clear cut case of the authorities getting the wrong man. *A Murder in the Park*, however, examines whether Porter was actually guilty all along and should never have been freed.

The film relays what happened in the original crime, but is not gruesome or explicit in a way that would make it tough for a free TV broadcaster to show, says Pollak. The Electus boss adds that it wouldn't have snagged the rights to the film if it didn't think it had appeal beyond the specialist crime channels.

THE SHOW: *Beach Cops*
THE PRODUCER: Seven Network Productions
THE DISTRIBUTOR: Beyond Distribution
THE BROADCASTER: Seven Network (Australia)
THE CONCEPT: Blue-light factual focusing on Sydney's stunning Northern Beaches

Bronzed bodies, bad behaviour and police work are the key ingredients of Beyond Distribution's key factual title in Cannes this year. The 6x30mins *Beach Cops* follows the New South Wales Police Force officers patrolling the sun-kissed, suburban Northern Beaches of Australia's capital, Sydney.

"It is a beautiful area where there's good sun and gorgeous bodies," says Beyond's head of sales, Munia Kanna-Konsek. "However, we show the other side of the area such as the dimwits who drink-drive. You might think nothing happens there, but it's really full of human interest stories."

Cases range from the ridiculous (a suspect accused of using a garden as a toilet) to the potentially deadly (a motorbike crash), and Kanna-Konsek says the show is easily formattable. "You just need really good characters and really strong storylines," she says.

Launching on Seven Network in Australia last year as an in-house production, Kanna-Konsek says ratings were around 1.5 million for the first few episodes in primetime. A second season is under consideration.

"We will be pushing it as a primetime property, or as part of a primetime package," says Kanna-Konsek. "We expect repeat custom, but also interest from some who have not bought from Beyond before."

The observational doc series also benefits from the narration of Layne Beachley, a seven-time Women's ASP World Champion surfer. Beachley is from Manly, a popular Sydney suburb within the Northern Beach that features in the show.



THE SHOW: *Operation Burma*
THE PRODUCER: Arrow Media
THE DISTRIBUTOR: FremantleMedia International
THE BROADCASTER: BBC Two (UK)
THE CONCEPT: Adventure/exploration series in which mountaineer Joe Simpson and survivalist Ed Stafford recreate a Chindits trek through Burma

Joe Simpson's mountaineering exploits provided the foundation for hit feature doc *Touching the Void*, and his book *The Beckoning Silence* has also been committed to film. Still a mountaineer, as well as being a motivational speaker, Simpson's latest project sees him team up with survivalist Ed Stafford to take on a 160-mile trek, recreating the path taken by his father as a World War II special forces soldier.

Simpson Snr. was in the Chindits, a covert unit operating in Burma in 1943 and 1944 that worked deep behind enemy lines attacking Japanese forces.

In BBC series *Operation Burma*, Simpson and Stafford follow a route used by the Chindits, covering terrain rarely tracked, and getting a first-hand feel for the gruelling missions undertaken by the soldiers.

The route is contained in a diary of his father's that Simpson unearthed, having previously known few of the specifics of his military career.

"This is a personal story for Joe," says Angela Neillis, director of non scripted, UK, EMEA and Asia Pacific, at distributor FremantleMedia International. "He had a good relationship with his father, but it was quite old fashioned in that they didn't talk about these things, and then Joe discovered the diary."

Stafford, the explorer who became the first human to cover the length of the Amazon on

foot (as captured in Discovery series *Walking The Amazon with Ed Stafford*) provides his survival and outdoors skills, giving the show some of the elements of the popular survival genre. "Ed is very popular with men and women," says Neillis. "He's from a serious, trained background, and really is the embodiment of the survival genre."

The two-parter is produced by Arrow Media, the UK indie created by the former principals of *Touching the Void* prodco Darlow Smithson, reuniting Simpson and John Smithson.

With survival, exploration, historical and personal-journey elements, *Operation Burma* should prove popular internationally. One issue, however, is its idiosyncratic two-part format, which could be difficult to place.

Neillis acknowledges the challenge, and says FMI will be looking to shop the series to pubcasters in the first instance. It won't be reformatting it into a feature-doc or any other format. "It's two great films," she says. "We'll target PSBs as they have more flexibility in their schedules, but with the survival element it could also pop up on a specialist or commercial channel if they can schedule it."

FMI already shops Arrow's *Dogs: Their Secret Lives*, which has sold into over 40 territories, and will be presenting *Operation Burma* alongside one-off Himalayan earthquake doc *Nightmare on Everest*. **TBI**

MENA goes major

Increased competition in the pay TV and subscription-on-demand sectors, and pressure on countries turning a blind eye to piracy are among the noteworthy trends in Middle East and North Africa region, according to predictions from Ismail Patel, analyst at media and telecoms research house Ovum

PAY TV GROWTH

Pay TV subscribers numbers are set to rise in the Middle East and North African region. They have passed the ten-million mark and Ovum forecasts will reach 13.4 million by 2020. Current stats show pay TV penetration rates are 14%, with Turkey and Israel accounting for 7.3 million of the current 10.4 million – more than 70%. Without these two territories, penetration drops to 6% regionally.

Turkey's Digiturk is the region's largest pay TV provider, with 2.5 million subscribers at end-2015. Compatriot D-Smart is second with 963,000 paying customers and Al-Jazeera's beIN, which recently acquired Digiturk, is third with 763,000.

beIN's progress will be a game-changer for the region in the long-term. Having moved into entertainment programming last year, the more-established pan-regional giant OSN inevitably faces churn. beIN, with significant assets and rights in sports and entertainment programming, will have a strong bargaining hand when negotiating reselling rights to telcos and other re-broadcasters.

The platform is already making waves, with Turner Broadcasting System indicating it would switch carriage of its channels from OSN. Should beIN win more Hollywood and international studio rights, it would be a big blow for OSN, which was created in 2009 upon the merger of Orbit and Showtime Network.

Despite the new threat from beIN, however, Ovum expects OSN to continue to grow its subscriber base.

OVER-THE-TOP SERVICES

The MENA region's video consumption is driven by a tech-savvy young demographic that welcomes new technologies. Most of the 72.5 million TV households will keep a television connection, but there will also be noticeable cord-cutting at an individual level.

In those territories with good broadband infrastructure, OTT services are gathering momentum. Well-known players such as HBO and Starz have a better chance of gaining subscribers than start-ups.

Established companies that have pushed into the online space have managed to win new customers, and prevent existing subs from churning in many cases.

However, monetising subscription-led content has proved difficult for pay TV providers, mainly due to the availability of direct-to-home FTA channels and piracy.

CONTENT

MENA provides one of the most desirable emerging TV content business opportunities, especially with Turkey and Israel adjoining the region. There are lucrative prospects for those who can gain a foothold in what was historically an challenging market.

Existing international partnerships in the region include Fox Networks Group and Saudi Arabia-based Rotana for channels including Fox Movies, Fox and FX; Abu Dhabi Media's free-to-air joint venture with another 21st Century Fox company, National Geographic Channel; and Sky News Arabia, which is owned by European satcaster Sky and ADMIC.

Sport and film are important in the region, but news is equally key in the oftentimes politically-volatile region. Devoted zones such as Dubai Media City and the twofour54 initiative in the UAE's Abu Dhabi are improving overall production quality.

Political problems, however, in Syria and Egypt are negatively affecting production, and have led to a decline in the volume of locally-produced content.

Moreover, the success of, and reliance upon, international formats such as *The Voice* and *Deal or No Deal* point to the fact that the regional indie production industry is largely underdeveloped and fragmented. High demand remains for local content across all platforms, but supply is low because of a lack of effective production and monetisation models.

However, Talpa Media has also moved into the area by launching a production company with Ziad Kebbi, who himself has launched

MENA PAY TV STATS

- Pay TV revenues will grow from US\$2.55bn in 2015 to US\$2.91bn in 2020
- SVOD services available in MENA include Starz Play (US\$13.99 p/month), Cellcom TV (US\$25), icflix (US\$7.99), mView (US\$7.99), Shahid Plus (US\$10.99) and Shashati (US\$6.66)
- TV piracy is estimated to cost US\$500m per year in revenues

a separate prodco, Maximum Media. Elsewhere, Banijay International and Red Arrow International have both signed format representation deals with local producers Periscope and Sync Media respectively.

Detailed ratings are hard to come by in the region, although attempts have been made to change this. GfK is working with Saudi Media Measurement Company to launch a TAM ratings system this year, while the UAE in 2012 launched a ‘peoplemetre’ (dubbed ‘view’) to gauge audiences and provide currency for evaluating the success of TV advertising.

PIRACY

Media legislation struggles to keep pace with the latest forms of online piracy, both of signals and physical formats, which has in part created a long term problem. Pirated DVD distribution remains rife in areas with poor bandwidth.

Meanwhile, the hundreds of free TV channels have promoted a culture that expects to receive TV without payment. This perception has assisted the rise of piracy.

Additionally, spillover signals from the Indian sub-continent, for which expat users pay a fee (but the service is still not legal in MENA), adds to the problems for local pay TV providers.

The size of the problem is difficult to quantify, although a common figure quoted by legitimate services is that pirates are costing the lawful business US\$500 million per year in revenues.

Leading broadcasters including MBC and OSN have, as a result, grouped together to form the Anti-Piracy Coalition.

Although initially having fairly modest aims – the implementation of a voluntary code of conduct and the monitoring of piracy on satellite TV – the hope is that this will be a first step in coordinating some effective steps against TV piracy.

Another body, the International Intellectual Property Alliance, says a key problem is the internet piracy of shows that are yet to launch in the region.

MARKET OUTLOOK

MENA has common languages, cultures and traditions, which means allows companies to launch pan-regional services without much variation.

Starz Arabia, for example, launched an SVOD service in 17 markets in April 2015 – the US cable company’s first international OTT launch.

Meanwhile, an expanding and young population is present in most of the region,

which creates a media-positive environment. In Arab markets, the success of content relies on social media popularity and relevance in the case of local Arabic content, and international popularity in the case of Western imports.

However, public spending cuts and rises in fuel, tax and energy prices, primarily in the GCC (Gulf) region, are getting deeper, and the content companies will need to adapt to these medium- and long-term changes.

For those on the poverty line, media spending can be a low priority.

Meanwhile, the Turkish market, whose drama programming exports raked in more than US\$250 million in 2015, and Israel will continue to operate separately to the rest of the market, due to their cultural detachment.

Turkey, however, is influential because if a new TV series is a hit in Turkey, it is seen by producers as a sign that it has the potential to do well in the Arab MENA, as well as certain European markets and Latin America.

Israel, politically isolated from the rest of the region, has tended to look towards the US and European markets for new content and business trends.

The dominance of the pair is changing at a very slow rate. The combined 70% share of the region’s pay TV subscribers that the two countries take will fall to 68% by end-2020, Ovum predicts. **TBI**

SVOD OTT services in MENA			
OTT Provider	Brand name	SVOD monthly pricing (US\$)	Notes
STC	Shashati	6.66	Shashati packages: Movies, series and kids shows, each for SAR25 (US\$6.66)
Mobily	mView	7.99	SAR40 (US\$10.66) for unlimited mView data package for Mobily users
Ooredoo	(Mozaic Clubs)	13.70	Clubs: ABC Studios, Disney Movies, Disney, On Demand, Al Jazeera (various pricing)
Etisalat	(Video Packs)	10.60	Free for eLife triple-play subs; charges only for Etisalat’s non-eLife subs
Du	(On Demand Clubs)	0.00	Free for triple-play subs
MBC	Shahid Plus	10.99	Trial version launched in June 2015
OSN	Go by OSN	10.00	
icFlix	icFlix	7.99	
Istikana	Istikana	7.99	
beIN	beIN Sports Connect	13.00	US\$10 for Arabic standard content. Available on daily/annual deals.
Starz	Starz Play	13.99	2Q15 launch
Cellcom	Cellcom TV	25	Israel
D-Smart	D-Smart Blu	3.00	Turkey

* Non-subs i.e. to broadband for the telcos, and to linear pay-TV for pay-TV operators and premium channels
 Currency conversions from oanda.com
 Source: Companies, Ovum

LAST WORD

SIMON MURRAY



Netflix's challenge: the next 50 million

Netflix finished 2015 with nearly 71 million paying streaming subscribers, up by 16.4 million year-on-year. To put it another way, Netflix has more than doubled its paying subscriber total since 2012.

The growth is far from over. Netflix expects to add 6.4 million paying subs in the first quarter of 2016 alone, which would be its best ever quarter. Digital TV Research forecasts that it will have more international subscribers than US ones by mid-2018.

So far Netflix's international operations have enjoyed the most success in English-speaking countries and Latin America.

However, huge expansion is expected following Reed Hastings' speech at CES in January. Hastings, CEO of Netflix, announced the launch of the streaming service in 130 countries, bringing its total count to 190 territories.

China was a notable exception from the new list. Netflix only ever expects to make a limited impact in China, and anticipates a relatively long wait before market entry. The company needs government approval, which is not at all easy for foreign media companies. Next, it will also almost certainly need a local partner – partly to satisfy the government and partly due to the difficulties for foreign media companies operating alone in China, which already has several well-established local SVOD players.

Netflix should be saluted as no-one else has such global ambitions. However, the firm is the first to admit that there is still much to do, with Hastings revealing in the company's fourth

quarter 2015 earnings call that much of this work will take place over the next two years.

Revealing your medium-term game plan can be risky as it allows your competitors to react.

This already happened in Spain. Telefonica reorganised its TV assets into Movistar+ following its acquisition of Canal Plus. Before Netflix's launch in October 2015, SVOD platform Yomvi became effectively free to Movistar+ subscribers as it was wrapped into its basic package. This is a serious threat to Netflix's growth chances.

Netflix's prices in the 130 new countries are US\$8-12 per month. These prices are expensive for most developing countries. Hastings said that the company was initially targeting the "elite" in most of these territories, but that pricing may change in the future.

Charging high prices is a risk for Netflix as local competitors can look more attractive. For example, Netflix charges INR500-800/month in India whereas competitors such as Ditto (INR299/month and owned by local media powerhouse Zee) and US studio-backed HOOQ (only INR199/month) are considerably cheaper.

So is Netflix going to maintain its high prices across the world to attract only the elite or will it tailor in subscription fees to each market as it becomes more established?

It's one thing to charge high prices, but how do you actually collect the revenues? Outside North America, credit card ownership is not necessarily high. Netflix overcame this problem in Latin America by introducing prepaid cards.

Can Netflix operate solely as a global player or does it need local help? The streaming company

has signed distribution deals with pay TV operators in several of its existing markets to aid subscription take-up, and we expect this to continue in its new markets.

Local competitors are already established in the local infrastructure and easily outperform Netflix with local content. For example, India's Ditto offers 100 linear channels, 3,000 movies and more than 100,000 hours of on-demand content.

One of Netflix's main strengths is its deals with major content owners. Hollywood TV and movie output has worldwide appeal, but interest is also piqued by local programmes. Netflix will have to produce local content in its major markets.

The platform will launch 600 hours of original content in 2016 – up from 450 in 2015. It is expected to spend up to US\$6 billion on programmes – compared with \$2 billion in 2013. About \$1 billion of the 2016 total will be on original content. Reports suggest that content spend will grow by \$1 billion each year for the next three years. In comparison, HBO spends about \$2 billion a year on content.

Most of Netflix's original content originates from the US. However, the company is making some efforts to localise. For example, it has commissioned dramas such as *Rita* in Denmark, *Marseille* (France), *The Crown* (UK) and *Suburra* (Italy).

Perhaps more urgent than local content is local language. As well as the 17 existing languages, Netflix added Arabic, Chinese and Korean in January. Other major languages are certain to follow. Until then, how many Polish homes will want to subscribe to an English-language Netflix?

Another challenge is low broadband penetration in developing countries. Fixed broadband is growing fast, but remains low in major markets such as India. Mobile broadband is growing faster. Mobile SVOD has taken off in the Far East, and is spreading across the rest of the region and into Africa and the Middle East. However, data charges can be high. **TBI**

“Hollywood TV and movie output has worldwide appeal, but interest is also piqued by local programmes. Netflix will have to produce local content in its major markets”

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