# TBI Asia

Television Business International

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# TBI Asia 2017






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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

Endemol Shine India managing director and CEO DEEPAK DHAR will leave the business by the end of 2017, replaced by company COO Abhishek Rege

South Korea-based content group CJ Entertainment & Media promoted Sebastien Kim to managing director of its Hong Kong office as the group looks to expand its presence in Southeast Asia

US studio Lionsgate launched an Indian office and hired ROHIT JAIN, deputy CEO of satcaster Videocon d2h, to lead it. This comes on the back of recent growth, and the changes see local sales agent Rohit Tiwari of Morris Street Advisors moving to a "consultancy" role

The Walt Disney Company India handed VP and business strategy chief Abhishek Maheshwari control of the Mouse House's local activities. He already ran its local media networks, and his promotion comes after a wider regional restructuring

Japan's Nippon TV named KAKO KUWAHARA as the managing director of its recently restructured international business development arm. Her appointment comes after Nippon handed overall control of the overseas business development division to veteran executive Yoshio Nakayama

Entertainment One hired Joyce Yeung from BBC Worldwide to become executive VP of sales for Asia Pacific. *Read an interview with the Yeung and John Morayniss on pages 22-23*

The Story Lab, part of Dentsu Aegis Network's media investment arm, appointed Iflix exec Donovan Castillo-Mohlman as its Asia Pacific president. Coming into Iflix as he exited was JONAS ENGWALL, the founding CEO of RTL CBS Asia Entertainment Network, who was named head of Asia at the SVOD service

Twentieth Century Fox Television Distribution hired former Sony Pictures Television exec Yan-Jong Wong as sales director of Asia

HBO Asia upped BEIBEI FAN to executive VP for new business and managing director of China. She has been with the Time Warner-owned company since 2014

EndemolShineGroup

Congratulating

# Cathy Payne

**Chief Executive Officer, Endemol Shine International**

on receiving the International Content Leader of the Year accolade from TBI and Digital TV Europe

Everyone from around the Group applauds you

# Discovery & Scripps: why Zaslav went big

Discovery Communications has finally struck a deal to buy rival cable giant Scripps Networks Interactive, for an eye-watering US$14.6 billion. Discovery CEO David Zaslav and international chief J.B. Perrette talk about the deal, the future of their business and wider content market challenges. Jesse Whittock reports

**TBI: Some people were surprised by the premium on the Scripps deal. What can you say about the deal at this stage?**

**David Zaslav:** It's a little bit misunderstood. From our perspective, we like it as a traditional acquisition because there is substantial synergy. Together we have most of the quality brands in the US with meaningful scale. People are looking for quality brands in bundles and we think together we will have a lot of weight.

**TBI: What can you do to better monetise Scripps' channel brands?**

**DZ:** In the traditional sense, those brands and that content hasn't been taken around the world, and that is what we do for a living – five years ago, we said we'd take TLC around the world and it is now in 200 countries. A year and a half ago we said we'd bring Investigation Discovery around the world, and it is in 150 countries and 200 within the next twelve months.

Using synergy and scale we will have the ability to promote and improve reach without buying marketing within the US, and be able to grow market share by moving their brands around the world at no cost. We will be able to save some meaningful content costs, as we'll be getting a full library that hasn't been seen.

**TBI: You've talked extensively about the concept of 'super fans' and the need to serve them with direct-to-consumer products. How does Scripps fit into this model?**

**DZ:** What people don't see, which is the most important thing to us, is Scripps owns all of its content, which has long view length and super fans, and really aligns with us. When we looked at the market place, we saw us, Scripps and Disney as the only three global media companies that own all of their content and that have the ability to sell it to any platform, so we saw Scripps as a very large acquisition of superfan IP. It also goes along with our overall strategy – as a company there is no question we are 'long IP', probably more than any other media company in the world, and this reminds me of many years ago when John Malone was driving Starz, and it was Starz, HBO and Showtime in the US premium cable market.

HBO and Showtime were buying movies for the premium window, but Malone say he wouldn't buy just for that and that he would pay more to own everything that goes on Starz. Everyone said that hurt his margins, but he said that some day soon the rights to that IP outside of the Starz platform would be worth more than on the Starz platform. He was right.

**TBI: How do you expect to work with the big tech and broadband players?**

**DZ:** The next two years in terms of these big platform companies will see them thirsty and hungry for IP. They could go country-by-country or they could come to us and do a worldwide deal. They could go out and do what [AT&T chief] Randall Stephenson did and buy their own IP [by acquiring Time Warner], or they can come to us and ask what we have.

Like Malone with Starz, we will have started selling that [long-tail content] in two years time, so when Deutsche Telekom, Apple or Vodafone calls and asks what we've got that they can put everywhere around the world, there's only us and Disney that can provide. That's our play. We could be dropping a couple of hundred million in EBITDA, but we're playing long and we think it is going to play off.

**Jean-Briac Perrette:** The dynamic of mobile and telecoms is important. Growth in a lot of pay TV markets in Europe has been flat, but companies have been making bigger moves. Around Europe, the telcos have ridden the mobile growth wave for the last ten years and now they need the next thing – and the next thing for all of them is getting into the video business. That dynamic is giving resurgence to the whole of pay TV across Europe.

**DZ:** The big platform companies need the next thing. Four or five years ago they weren't talking to content owners, but they've all come to the conclusion that the next thing is IP. You can see a complete shift in the mindset.



**TBI: What do you make of Facebook and other tech firms' entries into the original content market?**

**DZ:** People are spending more and more time online with video. We were talking to Zuckerberg, and his view is it will be primarily video. They're now doing mid-form, so we don't see them as the enemy, but as companies looking for IP. They are not content creators, but big platforms that want to nourish their audience.

**JBP:** What Facebook does well is build these massive global communities that have been able to link people all around the world who are passionate about something.

Our business, and Scripps' business, is super-serving passionate communities of fans, so there are a lot of opportunities to figure out how to do more with Facebook.

**TBI: How do you differentiate against the likes of Netflix and Amazon, especially as you are now going D2C with content?**

**JBP:** Netflix and Amazon have enamoured the world, and you think of the analogy to the retail business: Amazon began selling books, and then clothing, and then everything. There's a company called Zappo that only did shoes, and sure enough they built a multi-billion dollar company that ultimately sold to Amazon because it's not all 'winner takes all' in just one supermarket.

The SVOD players do a great job of super-serving broad audiences, a bit like the linear broadcasters. That's never been our core business.

**DZ:** We've better off going to the person who loves squash, which is hard to find, and offer them everything – sports, coaches, players and discussions – and they will pay for a lot of money for it. That's not dissimilar to cooking or science, which is why we're looking at launching a science app everywhere in the world.

**TBI: How do production companies protect their margins when the Discovery model is to own as much content as possible?**

**DZ:** The production business is actually quite healthy. We own 50% of All3Media with Liberty Global, so we have 24 production companies. The margins in the production business are historically not great, so we've dealt with this by owning a lot of production companies to steady our bet.

With all the changes in the business we still need great content. The thing that has changed is we were a business that thrived on second, third or fourth choice – you can do that in a world of 80 channels and nowhere else to go – but if you're in a world where you can watch anything, you won't watch a rerun.

**TBI: How do you read the global entertainment market?**

**DZ:** The issue we have in our industry right now is that we had an accelerating industry that went from US$4 billion to US$30 billion. Everyone saw the dual revenue of free-to-air and cable going on for ever, and all of a sudden all of us are in a tunnel. The question is who is going to come out.

We're in that tunnel working hard and investing, and we are strategically confident we will come out of that tunnel faster and stronger because of what we are doing right now.

**TBI: You've had a number of high profile carriage disputes this year in Europe – none bigger than that with Sky in the UK. Why are you taking a hardball line?**

**DZ:** Our content is now more compelling and we've spent a lot more money on IP, and that's why we've had to pull our signal four times in the past year.

Each time we've pulled it the outcry has been significant and we've been able to get back on with more compelling economics. It's very important that we have that high affiliate growth.

As a company, 50% of our revenue is affiliate fee, so if that can continue to see 5%, 6% or 7% growth, even if advertising is 0%, we are still growing 3% or 4%. That's why we've fought so hard. It hasn't been fun, but it's important to keep our ecosystem healthy and get fair value for our content.

**TBI: What is the opportunity in Asia?**

**JBP:** Asia is the most geographically and perhaps culturally diverse area of the world, so it's hard to talk about it as one. We have a two-prong strategy.

Discovery still has enormous resonance as a brand, and we will do more in terms of local IP in big markets like India within our genres. We have made short form investments in China with VS Media. That's similar to what we've done in Europe and to a lesser extent in other parts of Asia.

The second piece is about product. We see an opportunity in Asia given the huge youth audience and the massive pivot they have made. Unlike Europe and the US, which moved from fixed-line broadband and then to wireless, they have skipped straight over fixed-line and gone straight to wireless.

We have to develop products specifically for mobile, and we are developing a few things that will bypass pay TV and go straight to mobile. **TBI**


## HOW THE SCRIPPS DEAL IMPACTS DISCOVERY

Provided the deal for Scripps closes, Discovery will be by far the biggest player in thematic channels around the world. Scripps' shareholders will own 20% of the company, which will count David Zaslav, Liberty Global owner John Malone, Scripps Networks Interactive chief Kenneth Lowe, and Robert and Steven Miron as key players.

**It will also own the following channels and on-demand services:** Discovery Channel, Animal Planet, Investigation Discovery, TLC, OWN, Science Channel, Velocity, Discovery Family, American Heroes Channel, Destination American, Discovery en Familia, Discovery Kids, Eurosport, Discovery Life, Giallo, K2, Frisbee, Focus, DMAX, Quest, Home & Health, Discovery Turbo, Fatafeat, MAX, FEM, TVNorge, VOX, Real Time, Discovery World, Dplay, Eurosport (pictured), Eurosport Player, HGTV, Food Network, Travel Channel, DIY Network, Cooking Channel, Great American Country, TVN, Fine Living, Asian Food Network, and All3Media (50%).

**The analysts' view has been mixed:** Most are in agreement that Discovery and Scripps are better together in the short term, but the long view is less certain. A Jefferies analyst agreed the pair were stronger as one, but added: "The longer-term issues affecting the industry remain". MoffettNathanson Research said: "We are not sure bigger is actually better," but noted the combination would lead to "massive cost savings". Others say it is a sensible safe-guard against the changing market. The deal will create a "leading proprietary content company with a global reach as cable companies with significant in-roads in evolving video ecosystems," a Barrington Research analyst claimed.


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# OTT's golden moment

**Golden Karavan's Apoorva Bakshi and Jeff Sagansky talk to Kaltrina Bylykbashi about why India needs a new production company that aims to serve emerging OTT players in the territory**

The emergence on India's newest OTT production company, Golden Karavan, comes with the steep rise in take-up of streaming services in the territory and the understanding that local content works best when it comes to Southeast Asia.

The arrival of Netflix, Amazon and Fox-owned Hotstar in the last two years has shown that not only is India ready for streaming services, but those taking the local content mantle and making original programming and films in the territory are getting the biggest gains.

With wide uptake of 4G internet, a rising middle class and an appetite for entertainment, the Indian market is becoming a highly desirable target. Golden Karavan was formed by the combined team of Jeff Sagansky, Florence Sloan and Aaron Kaplan and Film Karavan's Apoorva Bakshi, Pooja Kohli and Sanjay Bachani in response to these recent changes.

Eighteen months ago Bakshi and co. began their project to get 'ahead of the curve'. "The viewership in the West had already changed towards binge-viewing TV and we thought that the behaviour will soon be followed in India as well, and it's now happening," she says.

The company's focus will be directed at creating highly developed original shows, something Bakshi says that has been majorly underfunded in India, and brings quality local-language content to OTT services and an international audience.

"There is a market limitation in the country, with many creating content because there is a huge 'escapism' attitude from the viewers and people really don't want to see dark, gritty, stuff.

"I deeply appreciate that content's presence in the country because it does help people, but

"We want to build a studio that focuses on empowering the writer-directors and making sure they are dear and long-term partners"
***Apoorva Bakshi***

# Searching for synergy

**An animation services house is hoping to become the Philippines' most significant creator of local original programming for families. Jesse Whittock speaks to Synergy88 Studios chief Jackeline Chua about basketball-themed toon *Barangay 143***

*Barangay 143*

"It's rare in this part of the world for people to create their own IP," says Jackeline Chua. The managing director and co-founder of Kuala Lumpur-based Synergy88 Studios is referring to her home territory of the Philippines, which has rarely figured on the international market in a sustained and meaningful way.

The old adage of Asia as the animation services hub of the world is one that holds true, but for a significant minority of territories and producers such as August Media Holdings and Synergy88 the model has been to focus on developing original content businesses.

"There is an international audience eager to learn about Indian culture, history and experience through entertainment"
***Jeff Sagansky***

in terms of the content that travels globally, there are independent voices that have been struggling with development – or lack of development support – in their own right, so we want to change that game."

Each company founder has gained deep experience of this space prior to its emergence. Sagansky, the media business investor and former Sony Pictures and CBS Entertainment president, has also worked on Videocon d2h, a satellite service for the Indian population.

He is joined by the Mumbai-based Film Karavan team, who began their journey as a distribution service to get Indian films on to digital platforms and have helped provide the emergence of an Indian content presence on iTunes, Netflix and Amazon.

"It's purely when all of us give a nod saying, 'this is terrific' in terms of appeal, reach and relatability that we go ahead with development," says Bakshi.

The company currently has two projects in production and ten in development. It wants to create at least 25 shows in the next five years.

"We want to build a studio that focuses on empowering the writer-directors, and making sure that they are dear and long-term partners in every project," says Bakshi.

Sagansky tells TBI that the prodco emerged for four key reasons. The exploding middle class and broadband take-up is a given, but also it was down to a global audience that now has an appetite for world content. "There is an international audience eager to learn about the Indian culture, history and experience through entertainment," says Sagansky.

"In the same way that Brazilian, Israeli and Japanese local language shows are getting large audiences on Netflix and Amazon, it's time for India to do its stuff."

He also notes the breadth of talent available, in front of and behind the camera, and the high level of storytelling already provided by the region.

"Writers like Amitav Ghosh, Vikram Seth and Khushwant Singh have written incredible stories, which will have great international appeal," he says. "We want to tap into those great writers and many others."

Bakshi says a good example of the company's aims are shown in cases like 2013's Indian romantic film *Lunchbox*, which broke records for India as an international seller.

"It actually had a lukewarm performance in India itself, but it took 4.2 million viewers in the US alone," she explains. "It really went beyond the diaspora even though it was a Hindi-language film, with the help of Sony Pictures for the distribution rights and coproducers in US, France and Germany. The film overall made US$5 million. Our idea is to be able to tell a very authentic story in the language that does not dumb down the actors and ensures that it reaches audiences worldwide."

It should be no surprise then, that Singapore's August and the Philippines' Synergy88 are coproducing *Barangay 143*, an animated series for Japan's TV Asahi that brings together anime and basketball.

"This is a big step for us as a company," says Chua. "When we started, it was as a services studio. We had set up as an IP creator, but hadn't found the right time to produce."

She says Synergy88 made "several attempts" to set up viable coproductions before deciding to bring in "experts from the international market" to get the wheels in motion.

A year ago, TBI featured *Barangay 143* in a feature about upcoming intellectual property originating in Asia, and the project is now at a stage where a second season is being worked up.

The show targets young adults and has an all-Filipino cast, including local stars Cherie Gil, John Arcilla and Jasmine Curtis-Smith, who are venturing into animation for the first time.

Chua says the series attracts both basketball aficionados and fans of primetime drama programmes, giving it a distinct and unique chance of international success.

"Anime has a solid fan base, so that means we have a solid audience and we're hopeful for more," she says. "A game [Barangay Basketball] is being sold in the Philippines, and will be available in several languages."

*Barangay 143* follows a group of basketball players in the Filipino capital Manilla. TV Asahi oversaw character design to create the anime feel, with Synergy88 on production and scripting.

Chua says Japan and the Philippines share animation sensibilities, as anime is extremely prevalent in the latter. She believes *Barangay 143* marks a milestone for original programming from the Philippines, but warns there is still a long way to go before the territory is threatening Japan's mantle as the top animation producer on the continent: "As an IP owner, we're still miles away, but we're attempting to reach that level, especially with the number of new digital platforms on the market." **TBI**

"As an IP owner, the Philippines still has a long way to go, but we're attempting to reach that level through new platforms."
***Jackeline Chua***

# The studio on Ramsay's street

**In two decades, Gordon Ramsay has gone from making food programming a staple diet for the mainstream to hard-hitting documentaries. The celebrity chef talks to Kaltrina Bylykbashi about his journey in television and what's coming next with his new All3Media-backed studio venture**

With 20-plus years in the television industry under his belt, Gordon Ramsay has gone from strength to strength, establishing as a strong and consistent presence across territories through his popular shows *Ramsay's Kitchen Nightmares* and *Hell's Kitchen*. In 2017, the celebrity chef finds himself entering a new era of programming tackling new themes, platforms and territories through the newly launched Studio Ramsay.

Formed with All3Media in 2016, the studio will have a 'global front' as opposed to a purely UK-focused strategy, and feature a range of "passion projects" dear to Ramsay himself, alongside long-running, glossier, programming.

On one such project, *Gordon Ramsay on Cocaine*, the chef says: "It's all very well doing all the glossy, shiny, high-end programming, but also we need to go back to programming with gravitas. We need to dig deep and go back to those raw areas that everyone's too scared – for fear of damaging a brand – to touch."

Even more traditional formats such as *24 Hours to Hell & Back*, which Fox picked up this September and features Ramsay guiding young caterers, could be expanded away from food to explore other industries.

"Because the show is like a modern version of a business in crisis, what we'd like to do is take that model and transfer it outside the catering sector," says Ramsay.

"We rig the business with a close circuit camera, and its high-pressure as that clock's ticking for 24 hours. We're looking to put that model into other businesses, which will be exciting."

The move comes from Ramsay's tireless energy to push projects forward and keep growing. He has a strong dislike for "standing still" and gets bored quickly, at his own admission. He feels this is what's keeping his content fresh to this day.

"When we have an idea, it's the best," he says. "We know it's the best because we get copied, so we move and change the goal posts before we get copied again. So, I've managed to stay in front of that.

"No one thought in their wildest dreams ten years ago that food would play heavily on the mainstream television in the US – they laughed at it. The positive response for *Kitchen Nightmares* since 2004/2005 has been incredible. *24 Hours* will do exactly the same as we did ten years ago."

Despite his relentless march forwards, Ramsay is thankful for his roots in British TV, saying that it's the core to his success.

"In the UK you're under the microscope in a way that is so difficult, and in a much smaller market than the States. The US is not easier, but it's bigger and so the support mechanism is a lot wider.

"I think I'd struggle if I was a young chef in LA trying to make it. They teach you well in the UK. You get that kind of DNA and that competitive edge in early, and you seem to work so much harder at it to make it bigger."

Last year, All3Media International opened in Asia ahead of ATF, and remains committed to bringing local business to Ramsay-fronted shows and content from his studio at the event this year. **TBI**

# FORTUNE STAR




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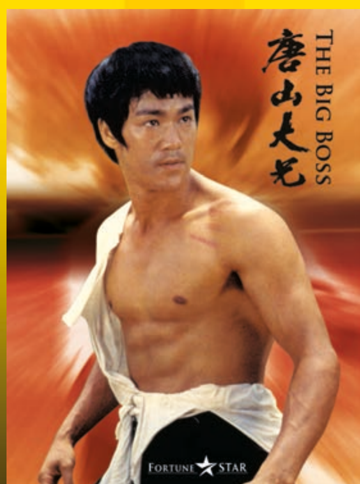



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# Featuring at the Forum

We asked a Asian television experts headed for Singapore's Asia TV Forum & Market about the key issues affecting the region's business


**TBI: How is subscription VOD and digital content in general affecting the Asian market? Recent data suggests it will soon overtake North America as the most significant region for SVOD.**

**Krishnan Rajagopalan, founder of regional movie studio Laughing Elephant and co-founder of studio-backed SVOD player HOOQ:** Subscription VOD, ad-funded VOD and other digital offerings have changed consumer experiences with content, and in that sense OTT delivery and apps have already established themselves as the future, especially in developed markets in Asia, including China.

That said, none of the players today in emerging markets in Asia have established strong consumer brands or sustainable business models, nor have SVOD players managed to get consumers to pay for the service at scale.

Additionally, traditional free-to-air and pay TV broadcast platforms are scaling up digital offerings to compete with pure-play OTT services, and have key assets such as content libraries and existing revenue streams that may give them a competitive edge in the long term. This means we are still at day one for OTT in most of Asia.

With respect to North America, there may soon be more OTT consumers in Asia than in North America because the addressable user base is very large, but the revenues in Asia will lag significantly compared to North America. China will dominate SVOD revenue in Asia over the next five years, with over 60% of the revenue, so the difference will be more pronounced if you look at Asia, excluding China.

Another potential difference between North America and Asia is that, given the overwhelming preference for local content in each market, the OTT consumer base will likely be much more fragmented across services in Asia.

Consumers and content producers are the main beneficiaries of the OTT battles today, and are enjoying the results of spurred innovation in the content production space and the additional revenue streams respectively.

The market is, however, valuing OTT platforms that aggregate and distribute content more favourably, much like in North America.

**TBI: Where are the most creative territories in Asia and what genres are they working in?**

**Dan Whitehead, head of drama and digital at K7 Media:** All the Asian territories are creative in different ways. South Korea's enormous turnover of scripted shows, for example, has led to a well-oiled production line that produces lots of genre fare geared towards domestic tastes, but the sheer volume also means that innovative breakout hits are inevitable.

China is somewhat at the mercy of government restrictions, which can change suddenly with drastic impacts on production and content, but this in turn has led to an industry that reacts quickly to change.

Japan, meanwhile, has attracted early investment from both Netflix and particularly Amazon Prime Video for good reason – it's a country that has a proven track record in developing IP that resonates in the west.

However, there are also countries in the Asia Pacific block that could easily bubble up, with the right investment and interest. Countries such as the Philippines, which produces hours and hours of telenovela style television, could tap into global tastes.

**TBI: Does Asia want high-end drama?**

**Dan Whitehead, K7:** There's a desire for high-end drama everywhere, but the definition of what 'high-end' means will naturally vary from one territory to another. Are Asian countries suddenly hungry for prestige drama from Europe and the US? No more or less than usual, which is to say not very much all, compared to other regions.

The last year has shown that there is a desire, however, for collaboration. Chinese investment in Hollywood movies is now standard practice, of course, and it's only a matter of time before similar overtures are made in TV terms.

**TBI: What will be the big trend in the next twelve months in Asia?**

**Tim Westcott, director of channels and programming, technology, media and telecom at IHS Markit:** We expect to see further launches of subscription video-on-demand services, with telcos increasingly involved. This will be accompanied by more original, digital-first content online and more online sport. **TBI**

I Can See Your Voice

# All eyes on Asia's next big thing

**Asia has a reputation as one of the most innovative and vibrant regions for formats, but are imports or exports winning out locally? Andy Fry reports**

For the most part, the Asian format story splits into two key topics: the export of Japanese and South Korean formats to the international market, and attempts by global format giants to licence their hit properties into the Asia Pacific region.

Shows that illustrate the durability of Japan's non-scripted format business include Nippon TV's *Dragons' Den*, Tokyo Broadcasting System's *Sasuke/Ninja Warrior*, TV Asahi's *Beat the Champions* and Fuji TV duo *Iron Chef* and *Hole in the Wall*.

Meanwhile, a high turnover of new shows within Japan means the country's leading players regularly come to market with innovative formats, says So Fujinuma, flying producer and director of worldwide production and sales in the general business department at Tokyo-based Fuji Television.

He says kitchen entertainment format *Cooking Speedmaster* and gameshow *Carry On!* are creating demand, while *The Noise*, a game show for Universal Kids in which contenders are not allowed to make any noise, is gaining international interest.

There is also increased emphasis on scripted formats, he adds. "Fuji Television's non-scripted formats have spread well across the world, but our scripted formats, although popular in

Asia, have not yet travelled to all corners of the globe, so we will be aiming to build and expand in Europe and the US," he says. "We have closed two option agreements with a studio in Hollywood, and discussions are ongoing with China and other Asian countries."

It's a similar story at compariot TV Asahi, where Yuka Kakui, head of format development and sales at the broadcaster's international business department, says *Ranking the Stars*, *Beat the Champions*, and *31-Legged Race* continue to sell well. More recently, *vs Kids* and *Experts Visiting Experts* have also become strong formats.

On the scripted format front, TV Asahi has closed a deal with Radiant Pictures Co in China for the nine-part primetime drama *A Family Goes Job Hunting* to become a 36-episode series, with production starting in 2018.

Kakui believes the market is pretty positive towards Japanese formats right now – a view that is backed up by the recent success Nippon TV has had selling scripted formats into Turkey – Star TV's remake of *Mother* recently won the Tokyo Drama Award.

"Our clients and partners look to us for ideas that are unique and singular, but which are also relatable at a basic human level," she says. "Japanese shows evolve at a fairly fast pace and thus we have a significant pool of fresh and unparalleled concepts."

Turning to South Korea, Jangho Seo, general manager of the global content division at CJ Entertainment & Media, points to studio-based shows and outdoor reality formats such as *Grandpas Over Flowers* (aka *Better Late Than Never*) and *I Can See Your Voice*.

The latter, has been commissioned in China, Indonesia and Romania among others, while *Better Late Than Never* has been ordered commissioned in six, including the US.

Seo says emerging markets are targets for scripted formats. "Recently we have been working with prodcos and channels in Turkey," he adds. "Asia and the US are also great since they have excellent understanding of South Korean culture."

In terms of imports into Asia, remakes in South Korea includes *Saturday Night Live*,

*vs Kids*

NBC's remake of *Better Late Than Never*


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*Lip Sync Battle*: a success in Asia

which airs on CJ E&M-owned channel tvN, *1 vs 100*, *MasterChef* and *Project Runway*. Japan, however, is still reluctant to buy for several reasons, according to Fuji's Fujinuma.

"Firstly, Japanese TV producers still feel a strong sense of resistance to 'purchasing ideas' – especially if it involves committing to a bible," he says. "Secondly, the global trend towards game or variety show formats casts ordinary folk as the central figures, whereas here in Japan, professional talents and entertainers take the lead. Thirdly, only one or two formats out of 60 years of television history in Japan have succeeded in our market."

For this reason, format owners have looked elsewhere. Talpa's *The Next Boy/Girl Band*, for example, is set to air on TV next year in Thailand following a decent run in Indonesia.

On top of all this, there is still a healthy business in the sale of formats on a pan-regional basis – examples being AXN's *Asia's Got Talent* and Lifetime's *MasterChef* Asia.

Viacom International Media Networks' global head of formats, Laura Burrell, points to *Lip Sync Battle*, which is is now produced in 21 countries, including India and China.

In terms of wider trends, Burrell says: "Scripted formats are in high demand, as are singing formats. Nostalgia-based programming has been on most broadcasters' wish-lists, which is reflected in our new format *90's House* being well received. The market is also opening up to factual entertainment, thanks to formats like All3Media's *Gogglebox*."

As for challenges with breaking into Asia, Burrell says: "The key is to find culturally adaptable content. We have to be sensitive to the local communities and cultural values in Asia, and ensure content abides by the laws and media regulations of each country."

One obvious question is whether there is scope for Asian formats from outside Japan and South Korea to sell globally. Small World IFT founder and CEO Tim Crescenti has a strong track record with Asian formats – selling *Dragons' Den*, *Better Late Than Never* and Thai show *The Fan* into the West, and is now working with Chinese formats including *Sing My Song*. "Asian formats can work internationally, but the key is presentation, perserverance and finding a champion," he says.

Often, Asian formats with strong universal ideas are let down "because their trailers and one-sheets don't get the core idea across, which is where we come in", he adds. "After that, you need to secure the first Western adaptation and that takes time. In my Sony days, it took nearly four years before BBC Two bought *Dragons' Den* – then it became an international hit."

China has been buying formats in recent years, but this has temporarily slowed thanks to a shift in the political landscape. More emphasis is now being placed on exports, with companies like 3C Media leading the way. The Chinese *Dancing With the Stars* producer was at MIPCOM with *Ancient Games*, a joint venture format with UK indie prodco Zig Zag Productions. This sees contestants participate in ancient-themed competitions on a colosseum-style set built in China, which will act as the hub for international productions, a significant development in terms of China's global format ambitions.

Shirley Cheng, senior VP at 3C, says: "3C has an international vision. We've had a successful and enjoyable experience working with international partners in the past ten years.

"The agreement with Zig Zag on *Ancient Games* will definitely be one of our milestone international cooperations."

Perhaps *Ancient Games* is a glimpse into the future of Asian formats. **TBI**

# Entertainment centre

**John Morayniss tells Jesse Whittock how North American distributor Entertainment One is evolving, while the company's new Asia sales chief, Joyce Yeung, outlines the local opportunities**

*Ice*

John Morayniss is convinced Entertainment One has created a model other companies could, and probably should, follow. The Toronto-listed firm recently did away with the divisions between its film and television units, as a physical representation of the concept that it is now 'content' rather 'television programmes' or 'feature films' that drives the market.

"We first consolidated in April where we brought global TV and films sales together under one P&L and one sales structure," says Morayniss, who has led eOne's television business since its creation in 2008. "As we were doing that, we began thinking about the sourcing of the content.

"We felt we were still operating a very old school way, where there is a film door and a TV door, and they are very separate. The business is changing and it is turning into a content door."

The resulting restructure saw Morayniss and eOne film chief Steve Bertram become co-presidents, with company founder Darren Throop remaining as group chairman and chief executive officer.

Morayniss points to eOne's acquisition of The Mark Gordon Company and a recent first-look deal with director Brad Westin as examples of businesses that are successfully filling the content-shaped space between TV and film.

He also refers to eOne's upcoming HBO drama series *Sharp Objects*, which will star Amy Adams and is an adaptation of Gillian Flynn's 2006 novel about a psychologically damaged reporter who returns to her hometown to investigate the murder of two young girls.

"*Sharp Objects* started out as a piece of film development," says Morayniss. "Jason Blum from Blumhouse pitched us the project, we optioned the book for him, and we developed it for a brief period of time as a film before we realised it would work better as an eight-hour series. We quickly pivoted and brought in a great TV writer and showrunner, Marti Noxon, who developed it as a television property."

eOne was able to implement the structure as its size meant bringing the units together was achievable. "Our companies are not as big as a studio, where film and TV are so separate and don't help each other," says Morayniss.

"If there's a film property that has been developed with US$1.5 million sunk into it that dies at some studios, the TV side might try to get hold of it. The film side will say that's fine, as long as they get the US$1.5 million paid back. We're working as one P&L, so that can never happen now."

Other companies such as Endeavor Content, the new moniker of the merged IMG and WME sales teams, have taken a similar approach to eOne – high-end projects are often packaged before the decision whether to sell them as TV series or feature films is made. "It's the same principle," says Morayniss.

The unification of film and TV was not the only structural move eOne has made this year. Following the move to merge sales, the company hired DRG's Noel Hedges as executive VP of acquisitions and ITV Studios Global Entertainment's Dan Gopal to become sales chief for the EMEA region.

*Burden of Proof*

That was followed by the hire of BBC Worldwide's EVP of global content sales, Joyce Yeung, as EVP of sales for Asia Pacific. The former Sparrowhawk Media exec, who has also worked at NBCUniversal and Disney, says the hires are indicative of eOne's desire to build its regional businesses.

"Asia has been a very important region for eOne," she says. "We've been focusing on development in Australia and launching *Peppa Pig* in China, and we've been doing content sales. However, the presence has been limited and we want to increase that.

"The overall strategy is to create new relationships and leverage the ones we already have. We have got an excellent portfolio, and we want to retain more rights."

Yeung says eOne is relatively limited activity in Asia is, in fact, a blessing in disguise, adding the new approach will have key focuses. "It's a very important to have a local strategy, which is why we're so keen to expand the local operation," she says. "It's about understanding the audience of local partners."

The strategy will be twofold: distribution and coproduction. The sales side will focus on key library titles such as *The Walking Dead*, *Fear the Walking Dead* and *Into the Badlands*, and newer series such as CBC's Kristin Kreuk legal drama *Burden of Truth* and LA underbelly drama *Ice*, which is headed into its second season. On the coproduction front, Yeung says eOne is close to a deal that will see an "significant" title from the company catalogue remade for "a well established" channel in China.

Both Morayniss and his new team will see this an example of the new eOne at work. **TBI**

## JOHN MORAYNISS ON...

**Where TV and film are converging:** "There is a swathe of development that looks and feels like feature films – we call it 'feature television' – and film producers feel at home with that, because it tends to be close-ended. The stories are presented creatively over a limited series, and it tends to be a little more packaged, with actors and directors attached. Then the model changes, because you're not then going to a distributor or using as much equity, but to a buyer – either Netflix, which buys the world, or an HBO, which buys in a different way.

**Where they remain apart:** "Where the two sides diverge a little bit is long-running series. A lot of filmmakers moving into TV see that as a harder leap for them – that's a skill set that is really specific. As a non-writing producer, Mark Gordon does that really well. He's managed to go back and forth between great episodic procedurals to epic feature films – I think he's a bit of a unicorn. Our development slate at eOne certainly has both types."

# LAST WORD

ASKANDAR SAMAD

## The nitty gritty of programme financing

The on-demand generation is radically altering the TV finance landscape. Viewers want it all and they want it now. Shifting consumer preference for on-demand content coupled with technological advancements in the means of distribution have revolutionised the way we watch our favourite movies, series and shows.

The advent of SVOD services is a natural response to the evolving consumer viewing habits. More and more of us want to watch our favourite content on our own schedule and in the comfort of our own living rooms – without ads and often on multiple devices. Usually one episode is not enough; we want more, so we binge watch until the early hours of the morning. As a result, the production of audiovisual content has shifted from series with scores of episodes per year in favour of miniseries, an area where the SVOD platforms have been making significant headway.

Last year Netflix splashed out a £100 million (US$130 million) on the rights to screen *The Crown*, one of the most expensive first season TV series in history. This rise of SVOD is reshaping the type of content that is being commissioned and the way it is financed.

The major services are constantly on the lookout for new content that will entice customers to sign up to their platforms, but they have realised that adding more movies to their libraries does not increase the amount subscribers watch. It is the delivery of TV series, rather than movies, which generates greater engagement. Fierce competition for premium series has already increased licence costs for all players.

There is in turn more appetite for independent content and the revival of shows previously screened on TV, as players need to find ways to differentiate themselves and to limit escalating acquisition costs.

Simplified licensing arrangements for SVOD-based series – compared with film distribution agreements that are frequently negotiated with dozens of parties – and lower distribution costs may suggest streaming giants such as Amazon, Netflix and Hulu should have more money in their coffers to pay the producers. However, user interfaces, which are a key aspect of delivering content to viewers and encouraging them to view more, attract heavy R&D investment.

At the same time, the interfaces are responsible for unlocking almost bottomless wells of data on subscribers' consumption patterns. SVOD players are therefore better positioned than traditional broadcasters to assess the risk profile of extending the series and to take informed investment decisions based on what their viewers like watching.

The fruits of TV producers' efforts are reaching more people and quicker than ever. More resources are being ploughed into the industry, so more players should be able to get a slice of the pie. However, unlike film finance, where most of the financing could be covered by pre-sales, revenues paid by the SVOD platforms are often spread over a much longer period of time, which means that smaller- and medium-sized production companies find it challenging to pursue their other projects while waiting to get paid. To even out the game in the UK, Barclays bank has recently launched a £100 million fund to support TV production companies in competing for orders from big video-streaming platforms.

The SVOD platforms are re-scripting the rules of TV finance. The technological setup enables them to achieve global reach, agility and cost efficiencies that are unavailable to traditional broadcasters, cinemas or good old DVD stores, and thereby reducing the risk of commissioning content.

Their ability to go on a shopping spree whilst deferring payments, however, does not necessarily mean that everyone can participate in the rise of TV financing. **TBI**

**The fruits of TV producers' efforts are reaching more people more quickly, so more players should be able to get a slice of the pie. However, revenues paid by SVOD players are spread over long periods**

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