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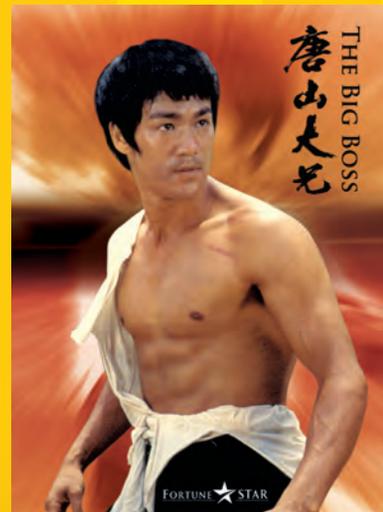
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EDITOR'S NOTE



STEWART CLARKE

The effects of the seismic political events of 2016 will be keenly felt in international television in 2017. That was the main takeaway when we interviewed execs from the drama, docs, formats and kids TV worlds for our extensive look at key events from last year, and the key trends that will emerge this year.

Some predict major drama franchises will go to the wall as tastes change, others that a new *Dynasty* or *Dallas* will emerge, and others that the drama bubble will burst entirely. What is clear is that the trend for cable networks and streaming services to invest in original drama is no longer a US phenomena, with international outfits now making major local scripted moves.

Many drama execs envisage a shift to lighter, more escapist fare, particularly for viewers who don't welcome the waves of nationalism in the news. In that respect, comedy could be entering an important phase – providing relief in the form of laughs and commentary through satire. Ash Atalla, who reshaped the comedy world with *The Office* tells us, however, that the genre needs to reinvent itself in the same way TV drama already has, to remain relevant.

Another reading of the current landscape is that TV producers, like a large proportion of the political classes, have failed to understand what people want and what drives them. How the industry serves up winning TV in the post-truth world of Brexit and Trump, and how

events affect viewing behaviour, will define 2017 (see Frapa boss Jan Salling's viewpoint).

The other story of the year will be what Netflix does next. Amid questions over its business model, the streaming platform will face global competition from Amazon this year for the first time. Could 2017 be the year it gets bought? There are only a handful of companies with deep enough pockets to do that deal and the new US regime seems against mega media mergers, but with Fox-Sky and AT&T-Time Warner transactions both in the works, the industry's main players clearly still want to consolidate further.

As NATPE gets underway we take a look at the new shows rolling out in Miami, taking in factual, formats and drama. In TBI Scripted we also sit down with Andrew Davies, probably the most prolific drama scribe the UK has ever produced, and he talks about the reinvention of *House of Cards*, and reclaiming *Les Misérables*.

The TBI team will be on the ground and reporting on events throughout 2017, on tbivision.com, in our regular podcast, and through other platforms. Here's to another eventful year in international TV.

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Gilmore Girls

Netflix – out of control?

An influential analyst has described Netflix’s content spend as unsustainable and out of control. As Amazon takes its streaming service global and traditional players launch OTT offerings to combat the SVOD giants, is Netflix biggest problem actually of its own making?

Influential research house Ovum has claimed Netflix’s current business model is unsustainable and its spending on content is out of control. Those are strong and controversial words directed at a company that has been one of the best performers on Wall Street over the past few years.

Ovum (which like TBI is part of UK-listed Informa) says the US-based SVOD company

is accounting for its content spending in a manner that flatters its weakening profitability.

In a highly critical report on the streaming company, Ovum’s Angel Dobardziew says: “Netflix’s current business model burns massive and increasing amounts of cash, which we think is not sustainable.”

Much of the industry commentary around Netflix’s original programming has been focused on cost. *House of Cards* was an early

US\$50 million bet, while shows such as *Between* and *Bloodline* cost around US\$20 million a season. *Narcos* is believed to be in the US\$25 million per season range, *The Crown* cost around £100 million (US\$125 million) for two seasons and *Sense8* was reportedly well over US\$100 million for one season.

To foot the bill for these originals, Netflix said in October it was raising an additional US\$1 billion to spend on programming, as its

annual content spend heads for US\$6 billion. Being a Wall Street darling, raising that kind of cash is not a problem.

The justification for the spend is the subscriber growth original programming generates. Shows such as *Narcos*, *House of Cards*, *Orange is the New Black* and *Stranger Things* have all driven US and international subs acquisitions, and Netflix now wants an even split of in-house and acquired fare.

Ovum takes issue with Netflix over how it accounts for its content spend, claiming it has “adopted a host of very aggressive content accounting assumptions that seek to paper over the deteriorating business economics and flatter its weakening profitability, both of which are the result of its spending beyond its means”.

The research firm adds that Netflix doesn't properly recognise its programming expenses in the short term. “It recognises too small a proportion of these expenses right now, pushes more of these expenses into the future, and as a result flatters its earnings,” the report claimed.

Netflix reported better than expected results in October, with revenues topping US\$2 billion. Significantly, subscriber growth exceeded expectations, prompting another surge in the value of its shares, which have rocketed in recent years.

The SVOD service has also become the centre of mounting speculation around a takeover, with The Walt Disney Company, Apple and Google all linked with a deal. Should this happen, any debts would transfer to the parent, which would be much more capable of amortising costs.

Ovum believes, however, that the current rate of customer growth cannot be sustained. “We think Netflix will find it near impossible to maintain its subscriber growth while at the same time keeping tight control of the costs that are driving its cash burn,” Dobardziew says.

Addressing the fact that investors have overwhelmingly backed Netflix, as reflected in its share price, Ovum notes Netflix trades at over 300 times earnings compared with the industry average of 25 times.

“The exuberance surrounding Netflix has parallels with the dot.com boom, when tech companies with lots of users – ‘eyeballs’ – and no profits were reaching stratospheric valuations,” says Dobardziew.

Netflix and other streaming services are undeniably having an impact on the traditional pay TV platforms in the US, with research

issued in November showing the biggest ever drop in subscriber numbers across the first nine months of the year. Other reports point out that number of SVOD homes in the US will soon top the number of traditional TV households – a positive sign for Netflix.

Ovum concludes, however, that Los Gatos-based Netflix is caught between a rock and a hard place in this rapidly changing landscape.

“It has to spend vastly increasing amounts of cash on producing original content amid a very competitive content production and licensing market, but is unable to raise prices sufficiently to make meaningful profits due to intensifying competition,” says Dobardziew.

Netflix did not respond to requests for a response for this article, but it does have friends in other places. Dror Ginzberg, founder and CEO of video platform Wochit, recently released a statement to tie in with the launch of the rebooted *Gilmore Girls* that praised the content strategy.

Ginzberg cites research that suggests *Stranger Things* was watched by 14 million in its first month of release and season four of *Orange is the New Black* by 6.7 million, saying this is “one of the biggest reasons as to why it is far more popular than its competitors”.

“Now with *Gilmore Girls* returning for a new

season with Netflix, under the direction of the original showrunners, the online streaming service is set to continue its ground-breaking trend for delivering the high quality, on-demand content,” Ginzberg says.

“It clearly recognises that this is where global audiences are going as online video now accounts for over two-thirds of all internet traffic, and is expected to jump to an unprecedented 82% by 2020.”

Amazon Prime Video's move to make *Top Gear* rival *The Grand Tour* available in 200 territories was, in fact, a precursor to a worldwide territory launch akin to the one Netflix undertook in January last year. Rivalry will intensify as a result.

Netflix chief content officer Ted Sarandos said recently *The Grand Tour* cost Amazon US\$250 million for three seasons, way above the previously reported US\$160 million.

He has been scathing about Amazon Studios' content spend claiming in a recent address: “It doesn't appear they're gaining much traction against all that spending.”

Coming from the most powerful commissioner in global television right now, the words hold weight, but do seem rich considering Netflix's own extensive use of the company card. **TBI**



Stranger Things

VIEWPOINT



JAN SALLING

Factual TV in a post-truth era

Donald Trump has become a leading exponent of post-truth in his successful bid to win the White House. What might the implications be for factual television producers and programmers around the world?

Twenty-sixteen saw some fascinating and worrying developments in terms of truth and the media – particularly around politics and the upheavals around the UK's Brexit vote and the US election.

Donald Trump has become a leading exponent of post-truth in his race to the White House. His support for the 'birther' movement and claims that President Obama 'founded Isis' are just two outlandish claims that were patently untrue, while being completely believable – at least to his supporters.

'Post-truth' as a term has moved from being relatively new to becoming widely understood by many in the course of the past twelve months, and has become lodged in the international consciousness: so much so that the Oxford English dictionary has chosen the term as it's 'Word of the year'.

With this in mind, what might the implications of post-truth be for factual TV producers around the world?

Well, I see a trend that counters post-truth and suggests that 2017 could actually see a flight to reality – a thirst for programming of greater substance, vision and authenticity.

In Scandinavia, there has always been a high demand for 'entertainment with a purpose'; a type of programming that seeks to delve deeper into societal issues and reveal more about the

society we live in whilst gripping viewers.

Recently two programmes of this type have particularly stood out for me as important. The first is the Swedish reality show *Dictator*. In this show, young contestants are placed artificially under the thumb of a fictitious dictator to experiment the benefits and limits of democracy.

The show deprives participants of individual freedom, comfort, sleep and is designed to trigger debate amongst young people watching on prime time on the strengths and weaknesses of their political system.

Dictator was produced by Art89 and UR, and broadcast on SVT2, and has been a ratings success with recent format deals for the show recently signed in Germany and the Netherlands.

In Norway, *The Homeless Experience* also succeeded in creating a national dialogue, as it explored the true stories of homeless people in the country.

This Teddy TV production for TV2 sees one man leaving the comforts of home to live for 52 days in the streets with no money and no contact with the world he used to know. Again, it was a ratings success that I believe points to more informed viewing.

The subject of beauty is another area I see a growing societal trend for digging deeper to challenge the 'accepted norms' of what beauty really means.

The Dove deodorant 'Real Women' cam-

paign went a long way to addressing the beauty industry norms of flawless, airbrushed complexions and zero-sized figures, and building a movement that women could relate to.

A trend for make-up free selfies and the new Pirelli calendar – for so long a nude cornerstone of the beauty world – has also broken with tradition and stereotypes to feature Amy Schumer, Serena Williams and others to reinterpret what beauty should look like.

TV is also following this trend. MIPCOM saw *Curvy Supermodel* launched by Armorza Formats and subsequently remade in Germany, becoming a big hit for RTL2.

The Fashion Hero, a new format that I have just started to represent, is also spearheading what I see as a global movement of challenging the old ways of the defining beauty in the fashion industry.

It is not just about size but the belief that men and women who are 'different' – thin or chubby, short or tall, freckled or scarred, etcetera – should not only be accepted as 'beautiful', but can and should be perceived as role models for a new, more-informed generation.

Twenty-seventeen promises to be an even more fascinating year and while news organisations rise and fall, social media continues to play an ever-important role in shaping our thoughts and discovery of news and trends.

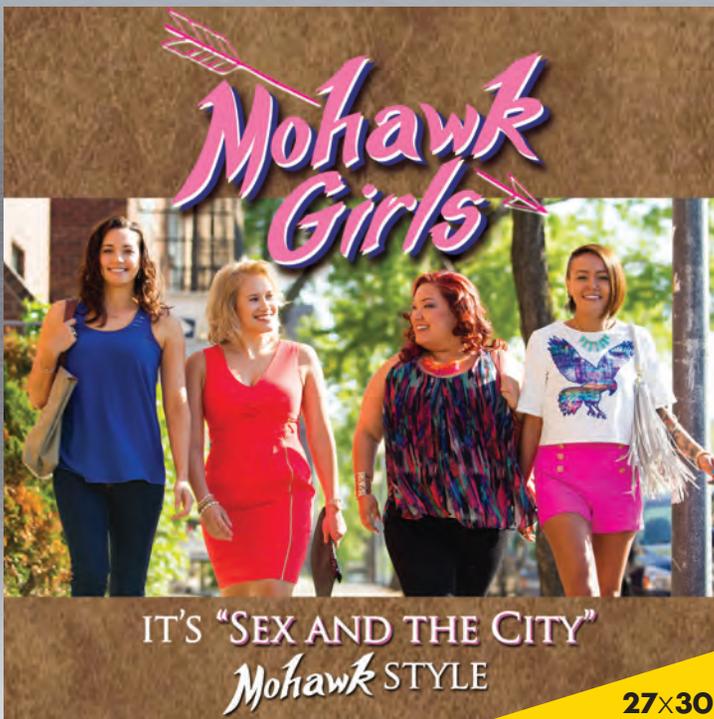
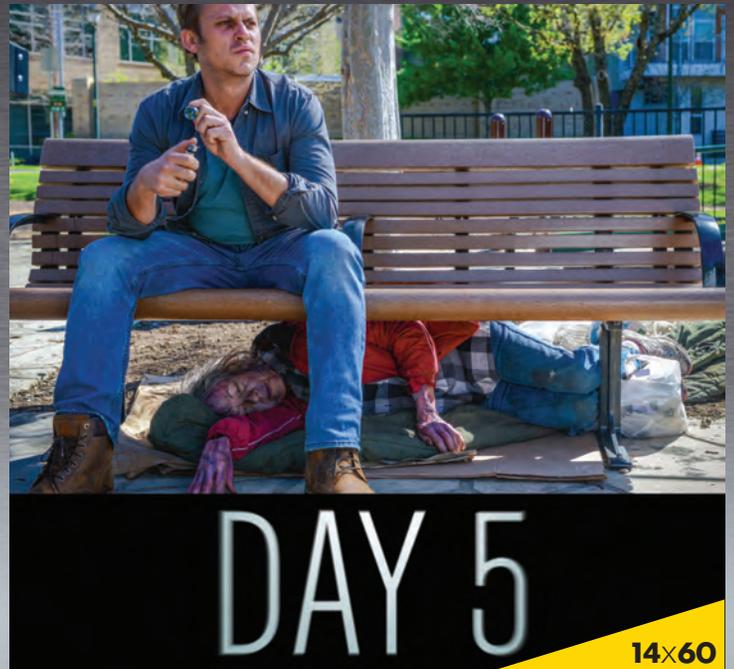
I believe factual television has a more crucial role – and indeed responsibility – than ever to explore the fundamental issues in society in an entertaining and engaging way that audiences can relate to.

It's time for programming of substance to come to the fore. **TBI**

I see a trend that counters 'post-truth' and suggests that 2017 could actually see a flight to reality, a thirst for programming of greater substance, vision and authenticity



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Keshet adding to the MX

In December, Keshet International's Asia chief, Gary Pudney, told TBI about the distributor's plans for new offices and staff in the region. As NATPE Miami starts, the company's Latin America boss, Kelly Wright, picks up the story, telling Stewart Clarke about plans for a Mexican production unit and an expanded local sales team

Keshet International launched a new production hub, Keshet MX, in January, a signal of intent in Latin America. "KI already has a great track record in the region with the success of *Rising Star* and *Boom*, so it's only natural to ramp up our business and expand into production in the vibrant Mexican marketplace," says Alon Shtruzman, CEO of Keshet International. "It boasts a great talent pool with whom we're looking to develop, produce, source and export local IP."

As the international arm of Israel's Keshet Media, the producer and distributor will soon debut the first fruits from its deals with powerhouse broadcasters Televisa, Telemundo and Telefe, as it sets its sights on expanding its Lat Am business.

Keshet MX, however, is the story of the moment. "We're establishing a production company in Mexico City," says KI head of Latin America Kelly Wright. "The vertically integrated groups, the Televisas and Globos, have studios, and we want ours to work on production, coproduction and work for hire."

Why Mexico? "Mexico and Argentina are the northern and southern regional hubs for the region, and Mexico is where the likes of Discovery and Sony set up pan-regional productions, and it is also a hub for the US Hispanic market," Wright says. "We also see the potential for hybrid productions in different languages, which are also cost effective given the economic situation."

Frank Scheuermann will be the fulcrum of the expansion. He joined KI in April 2016 as regional head of development and production, joining from Teleset, the Colombian prodco that is part of Sony Pictures Television. He added regional formats expertise to the mix with local versions of *Who Wants to be a Millionaire*, *Got Talent* and *The X Factor* among his credits.

"We already have Frank in place, and are now working to set up the team," Wright says. "We will hire for business development and business affairs. We want a small dedicated team covering development, distribution and business affairs, and production."

Keshet MX will not, however, just be focused on unscripted, with drama part of the plan. "We are sourcing content and can deficit finance and distribute, or coproduce," Wright says.

Keshet sold the *Prisoners of War* scripted format to Televisa in 2014 and a new deal with Mexico's largest media firm, and the largest producer of Spanish-language content in the world, was agreed at last year's NATPE.

The pair signed off on a three-year, four-project deal for scripted formats from KI. First up is *Loaded*, the comedy drama about a group of young friends who get rich after their video game becomes a huge hit. It has been remade in Mexico by Televisa as *Realidad Aumentada* (*Augmented Reality*), and will go out on its Blim on-demand platform, and will also broadcast on US Hispanic net Univision.

The other big US Hispanic broadcaster, Telemundo, is also working with KI. In the middle of 2016 the pair revealed they would work up three



Spanish-language drama originals, with the US net's Telemundo Studios division producing. The first project has been greenlit and will be one of Telemundo's 'super series', which are shorter and edgier than the net's traditional soapy novellas. Unlike, however, most of Telemundo's 10pm super series, the new show will not be about drug dealers, moving on from the narco genre and into thriller territory, says Wright. Spanish-language drama veteran Perla Farias, senior VP, scripted development for Telemundo Studios, will oversee the project for the NBCU-owned net.

In unscripted, KI shopped its *Boom* gameshow further into the region in 2016, with Brazilian free TV net SBT ordering a 13x30mins local version. This will play as part of the long running *Programa Silvio Santos* variety show.

Another broadcaster in the region to take *Boom* is Telefe, the Argentinian broadcaster that also runs KI staple, *Rising Star* (*Elegidos* locally, pictured above). The pair have a co-development deal for entertainment shows, and are aiming to work up and co-finance the creation of two pilots a year. Telefe will launch the shows and KI shop the formats internationally.

A new format, provisionally titled *Singer Swinger* (see page 24), will be the first to result from the deal. It will incorporate several programming elements beloved of viewers in the region as a glamorous reality dating format with musical performances. Meanwhile, interactive shortform gameshow and multiplatform game *Touch* has also gone to Caracol in Colombia in partnership with Grupo Éxito, the region's largest retailer.

Having revealed its Asia expansion to TBI in December, the Lat Am plans should be considered in the wider context of KI, still only five years old, but established as significant player in the international production and distribution scene. The sense is that there is more to come this year.

"Keshet MX is the next step in KI's global strategy to have a hub on every continent worldwide," says Shtruzman. "The business has grown significantly in 2016, in terms of deal-making, new divisions and key strategic hires in all regions, and 2017 will be another pivotal year for the KI network." **TBI**

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The Story Lab's next chapter

The Story Lab, which is set to become a key player in production financing, wants 20 primetime projects on its books by the end of the year. To get to that point the firm has brought in a number of well-known execs. Michael Iskas, global president of the the Dentsu Aegis-owned content outfit, talks formats, films and drama with Stewart Clarke

Michael Iskas has set an ambitious target for 2017. “We want a slate of 20 primetime properties by end of the year,” he says. “We have been getting the infrastructure in place and identifying opportunities to invest in and distribute content, and now are finding and developing shows, and can offer distribution across a global footprint.”

The Story Lab initiative originates from the advertising space, from which GroupM Entertainment is arguably the pioneer as a content financier, but Iskas is adamant that although his business is part of Dentsu Aegis, there doesn't have to be a brand involved to get a project off the ground.

“We want content that broadcasters and media owners want, and not because it has a sponsor, or is from Dentsu,” he says. “We will talk to clients about what we are doing, and if they want in, great. If not, no problem.”

As part of Dentsu Aegis, the Story Lab has had to convince the massed ranks of the TV industry that it is a serious player in formats, and soon films and drama. “Initially the challenge is to stop people thinking of us an ad agency and to see us more as a credible partner,” Iskas says.

The Story Lab addressed that challenge head-on with acquisitions – most notably the *Ninja Warrior* format – and by bringing in a raft of seasoned TV execs to run the business.

Iskas himself straddles both the TV and ad worlds, having come up through agencies Carat and ZenithOptimedia to head up the new venture. Elsewhere, the roster of recent recruits is very TV-flavoured.

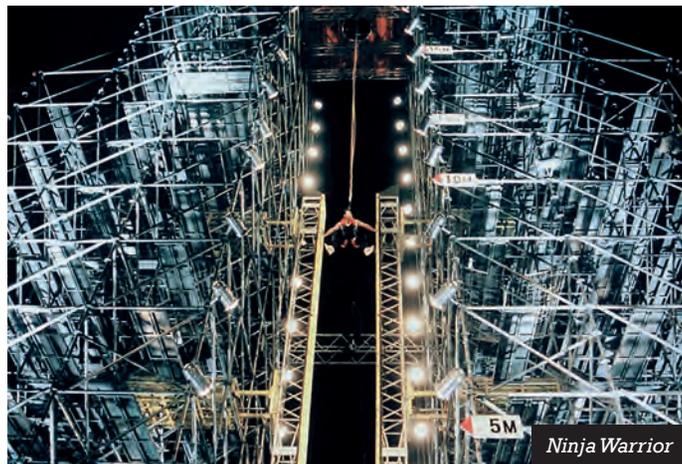
Luci Burnley has been hired as global formats director. The former Banijay formats expert was consulting after exiting Content Media-backed Small World IFT, but has now joined the team on a permanent basis and will run the group's unscripted business.

Nuno Santos – the well-known Portuguese TV exec – has joined to run a newly-created Iberia and Sub-Saharan Africa operation. He is a 25-year industry veteran, having worked in numerous roles at Portuguese pubcaster RTP, including director of programming. He was also head of content at SIC in Portugal, and then moved to the African pay TV operator Multichoice, where he was content manager.

Meanwhile, industry veteran Sinead O'Connor is heading up a new office in Ireland. She has worked at TV3 and RTÉ, as well as setting up her own consultancy. A UK operation, run by Michael McCoy, is also expanding, with Nik Wheatley joining from ITV to open a new Manchester office.

A Dutch office is being led by former Endemol Shine Group head of format acquisitions Erik de Winter, as TBI first reported in March 2016. “Bringing [this calibre of TV executive] in gave us credibility in this space,” says Iskas. “It signifies we are serious about being in TV content business and the hires are a good sign in that respect.”

He claims *Ninja Warrior* put The Story Lab on the map, but describes more formative days in Cannes selling the show from the bunker of the Palais at MIPTV, before the distribution team was in place. That effort worked, with sales to RTL in Germany, TFI in France and Discovery Networks in Italy.



Out of India, The Story Lab has picked up the *Street Stars* talent format from Grey Matter Entertainment, the local prodco behind Global Agency-distributed DJ format *The Remix*. The show follows street artists that the audience can rate and reward, and options are inked in Asia and Europe.

The group has 20 shows coming to market in in 2017, but the team is in acquisition mode, so what do prospective partners need to know? “We are strict and rigorous in how we evaluate a project,” Iskas says. “The slate will consist of new formats we produce and develop with independent production companies all over the world. We want premium primetime properties with mass appeal.”

Aside from seasoned team, what The Story Lab has that makes it an attractive partner is the ability to fund development and production. Iskas will not disclose the size of its fund – “no fund is ever large enough in premium entertainment content,” he says – but it is clearly large enough to acquire and develop formats, and the company will move into drama and film.

“We will start to focus on drama with scripted, and the third pillar of the strategy will be feature films,” Iskas says. The firm has started moving into movie distribution through a deal with Freeman Entertainment Distribution to bring the sequel to action movie *The Mechanic*, starring Jason Statham, Tommy Lee Jones and Jessica Alba, to central and eastern European territories.

As such, the hunt is on for a scripted chief as the venture moves on from entertainment and formats, to TV drama and then film. “It would be naive not to be involved in scripted,” says Iskas. “We can add value there, we can finance development, pilot and deficit-fund.”

While keen to send out a TV-centric message, Iskas will also harness what Dentsu has been doing in entertainment in the US and Asia. “We will get a lot of existing know-how from Dentsu in the content space in Japan and Hollywood,” says The Story Lab chief. “Dentsu has been a big investor over the past ten to 15 years, and that opens the door to a lot of clients.” **TBI**

WHO'S ASKING



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The year in TV has been defined by more great drama, epic docs, the continually growing influence of Netflix and SVOD, legal rows over entertainment shows, and greater industry consolidation. We talk to execs from different segments of the TV world about the moments that shaped last year, and what to expect from 2017



The power of formats was summed up this year when a reality TV star became the US president-elect. Donald Trump went from firing contestants on *The Apprentice* to hiring a Republican cabinet that will lead the Western world from this month.

Within the industry, 2016 was defined by the re-emergence of the debate around protecting IP. A spat between FremantleMedia prodco Abot Hamieri and Banijay Group erupted on the eve of MIPCOM – the timing was no accident, according to Banijay – and is set to see the pair take each other on in court. The dispute centres on the *All Against 1* format and its alleged likeness to Abot Hamieri's *Best of All*.

Jonathan Coad represents Abot Hamieri. Speaking about the challenge of protecting IP he says there is better recognition of the value of content than before at court level internationally.

"This has resulted in a rich body of case law that becomes ever more influential – especially in the major territories," he says. "In the end though, IP protection is primarily in the hands of the IP owner, who has to be proactive steps to ensure that the value of their investments is not lost to plagiarists."

The grey area between copying and simply having similar ideas arguably becomes more confusing given the world is getting smaller and worldwide trends inform development across different continents.

"Global development is being led by global trends, so we are seeing similar formats coming to market," says ITV Studios executive VP, global development and formats Mike Beale. "There is, however, a moral directive on producers and broadcasters alike to respect each other's IP, as otherwise we only damage our own industry in the long run."

Has protecting IP become more difficult in the past 12 months? "Very much so, especially if you have a very successful format such as *Dragons' Den*/*Shark Tank*, which is often copied," says Jane Dockery, senior VP, international distribution, Sony Pictures Television.

"Increasingly we're seeing format infringement cases in Africa, Asia and even with some of the bigger territories, which is disappointing. On a positive note, we have been successful in convincing some rip-offs to licence the format, to then bring them in line with our production guidelines and branding."

In terms of format trends, Armoza Formats' Avi Armoza says 2016 was not a year in which broadcasters were taking risks. "There has been a stronger tendency towards playing it safe this year, which has highlighted the increasing importance of a strong and varied catalogue

with proven successes," he says.

Small World IFT's Tim Screncenti agrees, saying the standout trend was "the cliché of everyone is getting more scared to take a risk". He adds that "constant consolidation and mergers stifling creativity" throughout the year was a disappointment.

Carlotta Rossi Spencer, head of format acquisitions at Banijay, agrees. "Overall, it was a year that was positive for older, more traditional brands. Just think about the successful ABC summer Sunday night: *Celebrity Family Feud*, *Pyramid* and *Match Game*."

If the examples of big-budget primetime risk-taking were somewhat thin on the ground in 2016, some companies see an opportunity for experimentation with more modest-sized projects.

"The same big talent shows still dominate the schedules, but are showing signs of fatigue, so broadcasters are experimenting with more medium sized formats, such as social experiments, which are relatively inexpensive to produce and can make a lot of noise in the schedule," says Dockery.

Going against the grain, US cable net A&E launched one of the highest concept and riskiest formats for years with *60 Days In*, in which participants go undercover into real prisons for two months.

Jeze Lee, an executive producer at Seven Network's London-based prodco Seven Wonder, thinks the show will lead a move into greater authenticity in entertainment shows. "A&E set the bar high in 2016 with *60 Days In*, now we've got to go further," he says.

Overall, **"The format market remained a healthy one in 2016, despite the lack of a breakthrough runaway primetime hit"**, says Laura Burrell, head of formats, programming sales, Viacom International Media Networks.

"There is a sense now that the international market is populated by lots of medium-sized hits rather than a handful of mega-hits. Whilst overall this is a welcome development, the downside has been an increase in the number copyright infringement disputes as ideas frequently overlap."

VIMN had one of the few breakout international hit of 2016 with *Lip Sync Battle*. It travelled first from the US to the UK, and then to a host of other territories. The show, which started out as a segment in Jimmy Fallon's talkshow, is now on air or in production in 17 territories worldwide.

Having turned the world of drama on its head, meanwhile, Netflix and Amazon moved into unscripted this year. Amazon spent hundreds of millions of *The Grand Tour*, the rival to BBC format *Top*

2016 YEAR IN REVIEW Formats



Gear. Netflix, meanwhile, in May ordered *Ultimate Beastmaster*, its first reality series. The competition show, which will be localised for various territories, will be produced by movie star Sylvester Stallone and *The Biggest Loser* producer Dave Broome.

Apple also moved into unscripted TV, with *Planet of the Apps*, an interactive format from Ben Silverman's Propagate Content, and by acquiring rights to the James Corden-inspired *Carpool Karaoke*.

Kabo International's Arabelle Pouliot-Di Crescenzo notes the increasing internationalisation of the formats business, with Asia a notable regional hotspot. "More countries are developing, distributing and acquiring formats," she says.

"We arguably also saw the start of a geographical power shift this year," adds Viacom's Burrell. "Many places that were once only format importers are becoming format exporters. South Korea was the new kid on the block in 2016."

Victoria Yarmoshuk, organiser of Kiev Media Week, argues that broadcasters shouldn't worry about a new breakout hit format because it is probably out there already out there... somewhere.

"I would say to the channels all over the world, stop waiting from another 'Big Thing', but rather concentrate on research and looking for formats that are most appropriate for your particular audience," she says.

"Viewers today have such a choice of channels, platforms and means to watch content, that the main task of the broadcaster is to give them that particular format and content they are looking for. The 'Next Big Thing' for your viewer already 99% exists."

In terms of M&A, Germany's Beta Film made a deeper push into formats by buying a minority stake in Lineup Industries, the indie distributor set up in 2014 by former Sony and Endemol execs Ed Louwse and Julian Curtis, the latter of whom says: "Twenty-sixteen saw the emergence of the SVOD platforms as credible players on the light entertainment and formats market. We believe this trend will continue and present tremendous opportunities for the right format and roll out models."

"Funding models are changing," confirms Suzanne Kendrick, BBC Worldwide's formats chief. "Linear and pay and/or online platforms are interested in sharing production costs and windowing the content."

Traditional broadcasters, meanwhile, need big primetime entertainment shows, which spells opportunity for formats creators and owners. The question is what genre and beats to focus on: could

2017 be the year viewers get more involved, for example? **"Live and interactive shows have not yet realised their full potential and this is something that will play a big role in 2017,"** says Avi Armoza, one of several contributors

who predicts there will be new ways of embracing technology in upcoming formats.

In the world of scripted TV, meanwhile, there is talk of 'peak drama' and a sense that the economics of making so much programming does not stack up for many of the channels investing. If channels start to question the cost of drama, entertainment formats offer a cost-effective alternative. "Unscripted is going to bounce back in a big way once the scripted bubble starts to deflate," says Sony's Dockery. "The appetite for social experiments will continue and I predict a big comeback for the gameshow, as it's still the most effective type of programming for bringing the whole family together."

We asked executives what the standout format of the year was, and there is a surprising level of agreement, and a clear winner. ITV's *TwoFour's This Time Next Year* is cited time and again as the defining show of the year. The 'time travel' series sees participants set out a major life goal before 'immediately' returning to detail if they achieved it. As well as the neat set-up, execs hail its sales strategy, whereby TwoFour Rights shopped it around the world before it had even launched in the UK.

"It stood out because the format was sold into numerous territories way before it had debuted on ITV," says Viacom's Burrell. "These presales prove that when an idea is good it can stand by itself without the backing of ratings or track record."

A notable mention also goes to *Married at First Sight*, the Red Arrow International-distributed show in which pre-matched couples get wed upon first seeing each other. Created by Red Arrow's Danish prodco, *Snowman*, the series is now in over 20 countries, with France's M6 among the recent buyers of a local version.

Simon Andreae's Naked Entertainment, which the former Discovery and Fox exec set up with backing from FremantleMedia, hit its stride this year with shows for UK broadcasters and several in the works in the US. He says formats will take a leaf from scripted TV in 2017 in terms of scope and ambition.

"TV has started to look more like cinema," he says. "We've seen that in scripted and next we will see it unscripted – 'spectacle' and a cinematic vision will become important. As producers we can put the amazing and otherwise unseeable on screen."

2016 YEAR IN REVIEW Digital



Sebastian Burkhardt



Stranger Things



Jakob Mejlhede



Swedish Dicks

Twenty-sixteen was bookended by subscription VOD services taking their limited offers and launching them globally around the world. Netflix shocked the world by switching in a total of 200 territories in January and Amazon Prime Video ended the year by doing the same.

The impact for content creators was immediately evident. **“No other network has the ability to turn programme brands into worldwide phenomena overnight in the way Netflix can,”** says Keshet International’s senior VP, digital, and head of business development and acquisitions, Sebastian Burkhardt. “The rollout of Amazon Prime Video to a wider geographic base will be worth watching in 2017,” adds Simon Murray, principal analyst at Digital TV Research.

In the one territory neither Netflix or Amazon could launch – China, which refused to allow the international services access – there was strong local SVOD growth. “The member subscription model is growing significantly in China, with iQiyi and Youku both announcing astonishing increases, both exceeding 20 million,” says Rebecca Yang, CEO of Anglo-Chinese producer IPCN.

“We will see Chinese platforms going global in 2017, eating away at American assets,” says Jam Riemens, founder and CEO of Netherlands-based multichannel network Zoomin.TV. Riemens claims much of Netflix’s bluster has been due to having “the best PR”. “However, as with [taxi service] Uber, the local broadcasters will fight back. For example, MTG, our parent company, is holding firm in the Nordics.”

For Riemens and others, it was, in fact, Facebook Live that was the most innovative new platform in digital distribution in 2016. “Mainstream audiences are tuning in in huge numbers to watch live broadcasts,” says Keshet’s Burkhardt.

It was also a breakthrough for local SVOD services stepping into the originals game. “It’s not all about Netflix and Amazon,” says Digital TV Research’s Murray. “Southeast Asia-based Iflix and South Africa-based Showmax are exploring some interesting projects.”

Jakob Mejlhede, executive VP of programming and content development at MTG, points to the original content push at his firm’s Scandinavia on-demand service, Viaplay, through series such as the Keanu Reeves-starring *Swedish Dicks*.

“Original content is a massive step forward for us, and seeing our first series on screen – featuring stars like Peter Stormare and Johan Glans – felt just fantastic.”

“My view is that 2016 was the year when streaming truly came of age – both in terms of usage and content,” he adds. “It’s very interesting to look at the huge volume of scripted series produced this year – more than 500 shows, last time I counted – and then at the increasing rate at which series are tied to streaming services.

“Of course, Netflix is obviously a hugely significant force behind this development. However, what will create long-term success for more local players like ourselves lies in the ability to create and meet demand across multiple platforms, not just on one service.”

While Netflix had a watercooler hit in *Stranger Things*, Amazon has easily had the most-talked-about original of 2016 in the shape of Jeremy Clarkson’s new petrolhead effort, *The Grand Tour*. The show rolled out on a transactional basis in 200 territories weeks before Amazon Prime Video debuted its full SVOD service internationally.

“A mainstream non-scripted, global phenomenon being remade in the OTT space seems to signal the rebirth of non-scripted TV on new platforms after several years of scripted shows dominating the headlines,” says Keshet’s Burkhardt.

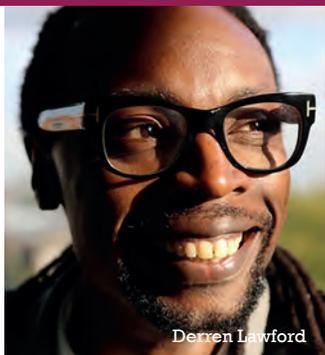
Many respondents to our 2015 Year in Review survey successfully predicted the coming impact of MCNs, YouTube Red, Facebook and even Apple, which ordered original programming. Another common prediction, the proliferation of Ultra HD / 4K television, was less accurate. “Many people predicted that 2016 would bring with it the widespread roll-out of UHD channels, and sure enough we have seen strong traction in sports broadcasting in particular, where upgrading to the standard has been considered a significant benefit to the viewing experience and necessary to match the demand of audiences,” says Nick Moreno, head of strategy, satellite and media at Arqiva.

“However, there has been little sign of any kind of significant advancement across other genres in terms of linear channels – and certainly not to the level that many suggested. Indeed, all those analyst predictions that were made a few years ago concerning a future of hundreds of UHD channels in 2016 seem to have been quietly forgotten by all.”

So what is coming on the digital front in 2017? “More hybrid formats that truly connect TV and digital platforms,” says IPCN’s Yang. “More game IPs, and in regards to China, more Japanese 2D animation content for both TV and offline events.”

Meanwhile, Simon Murray from Digital TV Research suggests the big upcoming rights war will be in live sports broadcasting.

2016 YEAR IN REVIEW Factual



Derren Lawford



Mars



Chris Bonney



Planet Earth II

If scripted TV dominates the headlines at the moment, 2016 served up a few factual blockbusters. Genre-bending Nat Geo series *Mars* married golden-age scripted TV with documentary, *Making a Murderer* became watercooler (internet) TV and reinvigorated the true crime genre, and Leonardo DiCaprio brought some A-list movie star power to feature docs.

Industry folk almost all cited one show, however, when asked about the factual moment of the year – or perhaps the TV moment of the year. “It was the global audience reaction to *Planet Earth II*,” says Paul Dempsey, president of global markets, BBC Worldwide. “I can’t think of any other follow on series that has made such an impact, not only in the UK but internationally, ten years after the original.” The blue-chip nature show sold extensively internationally and delivered massive Sunday evening primetime ratings for the BBC.

Cineflix Rights boss Chris Bonney says the series helped underline the popular appeal of factual and that 2016 was a good year for distributors. **“The growth of new thematic channels alongside the increase in demand from SVOD platforms for factual content is leading to an increasingly competitive market,”** he says.

Bake Off and *Making a Murderer* were big news, for different reasons, this year. *Great British Bake Off*’s switch from the BBC prompted hand-wringing and no shortage of ill feeling – played out on stage at the RTS conference in London at one point – but money talks and Channel 4’s £75 million (US\$93 million) was enough to seal a three-season deal for the cooking competition show. Cineflix’s Bonney says it “signified more than anything the shift in power from the distribution platform to the content owner.”

Earlier in the year, *Making a Murderer* came out of nowhere to be one of the buzziest shows in TV, sparking numerous other true crime series in the docs space, including in scripted as *American Crime Story: The People Vs OJ Simpson* forensically examined a real-life case. Discovery’s ID net responded to Netflix with fast turnaround doc *Front Page: The Steven Avery Story*, which refuted some of the details in the Netflix series.

At the highest end of the scale, factual projects could sit alongside big-ticket drama. **“Epic and international factual feels like it is beginning to take a place alongside high-end drama,”** says Derren Lawford, joint creative director of Woodcut Media.

Nat Geo’s *Mars* took the best of both worlds and came during a period of change for the company – it is now fully owned by Fox. Courtney Monroe became the international channels chief under the new structure announced late last year, and went on to rejig Nat Geo,

handing Tim Pastore a wider remit amid wide-scale staff cuts. National Geographic Channel became simply National Geographic, while programming highlights included Leonardo DiCaprio eco doc *Before the Flood* reaching 30 million people globally.

For producers and industry observers, Nat Geo’s shift throws up questions. “The strategy to invest in fewer but much more expensive and unashamedly high-profile series is a very bold move,” says October Films’ Adam Bullmore. “But what if the viewing numbers don’t back-up the play? What if previously loyal producers feel excluded from the big prize? Can it be sustained? And what’s plan B?”

Ed Sayer, vice president of production and development, factual, Discovery Networks International, says there will be a fight for eyeballs at the high end of the market next year. “We’re going to see a battle for premium factual emerge from some of the big players and we might also see some more consolidation in the market,” he says.

Discovery had brought Marjorie Kaplan from the US to the UK run international programming, replacing Phil Craig and setting out a vision for ‘creator-led content’. It didn’t work out like that, however, and Discovery now looks to be focusing its international programming efforts at a regional level. Kaplan exited.

Elsewhere, former Discovery and Eurosport exec Arjen Hoekstra was brought in to oversee the global channel roll out of Viceland, the linear channel launched by hipster brand Vice Media. Early numbers were dismal in the UK and US, and 2017 will be the year Vice proves whether it can cut it in traditional TV.

Looking ahead, many programming execs see these and other seismic events informing programming into 2017 and beyond. “You will see a desire for more uplifting, celebratory and hopeful content,” says Jonathan Chinn, co-founder of prodco Lightbox. “This year was unsettling and destabilising for a lot of the world, and people won’t want to see a dystopian view of the world in their entertainment in the near future.”

“In these uncertain times viewers are also looking for escapism, and factual and natural history programming is especially perfect for this,” says Mark Reynolds, BBC Worldwide’s genre director, factual. “They also want to understand the world in all its aspects, and documentaries play a key role in delivering this. We have seen a new perspective on learning about our planet, both garnering a younger audience using digital, as well as a sense of coming together for shared viewing.”

Discovery’s Sayer adds: “The content business continues to grow, and there are many new entrants into the factual commissioning space, so the next few years could be a golden age for producers.”

2016 YEAR IN REVIEW Kids



Halle Stanford



Nick Walters



Alison Warner



Christophe Goldberg



Andrew Cole-Bulgin

Undeniably, 2016 was the year digital platforms established themselves as key kids entertainment market gamechangers. **“Netflix, without a doubt was the network that made the biggest impression across the year,”** says Halle

Stanford, executive VP of children’s entertainment at The Jim Henson Company. Many others agree – Andrew Cole-Bulgin of Komixx Media Group says the SVOD service is “leading the way in terms of providing a platform for producers to push creative boundaries and curating online quality content for all audiences”, for example. “In terms of gamechangers, Netflix is up there,” adds Laura Burrell, head of formats, programming sales for Viacom International Media Networks.

“Actually, for kids, YouTube’s a bigger deal,” argues Hopster founder Nick Walters. “Netflix has some great programming, but will you ever be able to break a new kids show on Netflix in the same way you can on broadcast? Not sure.”

People have “consistently underestimated” YouTube and its SVOD service, YouTube Red, to their detriment, he adds. “The reach and engagement are just very, very impressive. There’s plenty it still needs to work on, but no question it is changing the market.”

For Christophe Goldberg, founder of Spain-based distributor GoldBee, the main player is Amazon Prime Video. “It started its expansion on the international market, providing the industry with significant new revenue streams,” he says.

“YouTube has become the destination where, globally, children point to when it comes to the consumption of content, while Netflix’s impact lies in the creation of high end content,” says Ed Galton, chief commercial officer and managing director of UK-based distributor Cake. “Netflix continues to be one of the most important networks. However, in terms of total numbers, it is still below other platforms and channels.”

Alison Warner, VP of IP sales and acquisitions at US producer Technicolor, warns of further issues surrounding Netflix, saying: “It continues to be a dominant global network in terms of the sheer volume of shows being commissioned, which creates fabulous opportunities for producers. However, it remains challenging for long-term brand building where ancillary exploitation is required.”

Scepticism over whether SVOD services provide a strong enough platform for programmes, especially in preschool, to develop into fully-fledged brands with licensing and merchandising programmes around them certainly still exists, despite the overall enthusiasm for the overall impact of the digital networks.

A bigger problem for many distributors, however, is the trend for commercial broadcasters to seek exclusive pay TV and non-linear rights, “completely closing the door to other non-linear platforms”, as one vendor puts it. This is widely seen as a trend that will expand next year, as more SVOD services launch.

“From a distribution perspective, the market is better than twelve months ago, as both traditional broadcasters and newcomer SVOD platforms acquire content, which compensates for the lower fees that are being paid,” says GoldBee boss Goldberg. “Financing is still a major challenge, as very few SVOD platforms have financial muscle to produce kids programmes,” he adds.

BBC Children’s impact as a perhaps the single most significant linear broadcaster is still being felt. **“The BBC continues to rock, both in terms of diverse content and market share,”** says Technicolor’s Warner.

Nathan Waddington, who is head of children’s scripted at BBC Worldwide, notes that much of that diverse content is coming from the animation sector. “Animation continues to dominate not just our slate, but also the wish list of buyers globally,” he says.

Elsewhere, this year has seen the emergence of Asia as a global distributor and consumer of kids programming. Todd Miller, who is CEO of Celestial Tiger Entertainment, the company behind new Asian-focused kids channel Miao Mi, says: “We are experiencing global demand for our brand of Mandarin edutainment.”

Further to that, he adds: “The emergence of OTT services provides not only new distribution platforms for new services such as Miao Mi, but also new ways to efficiently target diverse customer segments, demographically and geographically.”

Overall, there is much optimism within the industry. “In 2016, producers and distributors alike managed to produce and develop more content than ever in the constantly changing media landscape, which is definitely positive and makes you feel a real sense of achievement,” says Nickelodeon’s senior VP, international development, Nina Hahn.

Wider world events such the Brexit/Trump effect – see our factual, formats and scripted sections for more – will also have an impact in kids TV, says Fernando Szew, CEO of Marvista Entertainment, which has an extensive kids and family catalogue.

“There will be a push towards more political correctness on kids nets and channels,” he says. “In our wild political climate, there will be a creative commitment to helping kids understand the winds of change.”

2016 YEAR IN REVIEW Scripted



Marc Lorber



Westworld



The Great Indoors



Jeff Ford

Another epic year in television drama has passed, with more original series, more money put into scripted and more ambitious and high-end projects than ever. The question is if it can last indefinitely.

Was 2016 actually a good year for drama? “Generally yes, but fraying at the edges is starting to show,” says Marc Lorber, the Lionsgate drama executive. **“Financiers and distributors will lose out if they don’t have library and diversity.”** Jane Gogan, head of drama at Irish broadcaster RTÉ, says drama is, in fact, in a better state today than a year ago. “Not in quantitative terms, but qualitatively definitely,” she says. “There are more distinctive titles and a broad range of stories, structures, styles and tones.”

One of 2016’s big drama stories saw HBO confirm the end of *Game of Thrones*. The premium cabler launched the much-hyped *Westworld* to good early results, but the show faces a massive challenge to emulate its dragon-starring forbear. Elsewhere, Casey Bloys replaced long-serving programming supremo Michael Lombardo in a year of change for HBO.

France’s Vivendi made a major drama play – but on the phone screen. With cable arm Canal+ struggling, it launched premium mobile content service Studio+, and will now aggressively push it into new territories.

The relentless zombie advance of *The Walking Dead* continued in 2016, with the season seven opener proving to be one of the most violent and harrowing episodes of TV ever. Royalty was in fashion with Netflix’s *The Crown* and ITV’s *Victoria* going down well with period drama fans.

Scandi drama evolved with the likes of Viaplay’s *Swedish Dicks* adding to the region’s cannon of noir, and StudioCanal’s SVT drama *Midnight Sun* was an example of Nordic prodcos working with new partners.

With increasing demand for drama, speed to market is changing. “Higher demand and increased consumption has led to an inevitable production bottleneck,” says Amelie von Klein, Red Arrow International’s senior VP, scripted acquisition and coproduction. “There aren’t enough writers available to meet the demand. Although speed to market is vital, lead-time on dramas has decelerated.”

That scarcity of talent is felt most keenly in the smaller markets. “The scale of demand of talent is excellent for cast, crews, writers and directors, as well as producers, and that’s a good thing, but it creates challenges for managing costs and creative consistency, especially in the small territories,” says RTÉ’s Gogan.

For comedy, however, the increasing amount spent on drama presents a challenge in terms of funding original content, according to Roughcut’s Alex Smith. “Budgets are not increasing,” he says. “If

anything they’re being siphoned off to drama.”

The continuing trend for US cable nets to order increasing amounts of original drama continued into 2016. Increasingly, cable players and on-demand services internationally are creating their own scripted series.

European pay TV giant Sky started ordering several new shows out of its German and Italian operations (*Babylon Berlin*, *The Young Pope*). Scandi SVOD service Viaplay, meanwhile, is planning on 50 dramas, and HBO will this year work up shows out the Nordics and Spain, having hired Miguel Salvat from Movistar to run its new service in the latter. Movistar’s originals push, meanwhile, is already well underway.

At the back end of 2016, Fox Networks Group Europe and Africa ordered *The Nine*, a ‘Le Carré meets *Bourne*’ spy thriller, and the first ever drama original for its networks in the region. The cost of buying US studio and big-ticket drama means local production increasingly makes sense, says Fox Networks Group’s Jeff Ford, who added original production to his remit last year. **“Drama continues to be the driver for mature schedules and, with costs rising to simply acquire, the financial risks are reduced for networks and platforms to commission,”** he adds.

The TV drama market has been compared to the housing market in some territories, in that the economics seem to defy the realities of the sector. “It is hard to see how the present volume of drama output can be maintained indefinitely given the economics and the cyclical nature of the industry,” says HBO Europe’s programming chief Anthony Root. “Some smaller players will find 2017 challenging.” Asked if we reached peak drama, Lionsgate’s Lorber says: “We are walking atop the mountain ridge top towards a precipice.”

As with all other genres, execs in the drama business cite Brexit and the election of Donald Trump as key influencers of programming trends.

The Ink Factory’s Stephen Cornwell notes that “reality has become a lot stranger and more frightening than fiction”. “When *House of Cards* and *Veep* are both understatements, and when *Homeland* should be set in Texas and not Berlin, how do we speak to that new reality, and how to we respond within the context of fictional and imagined entertainment,” he asks. “My projection is that a number of established and/or significant serious dramas will underperform in the next year, while comedy, musicals, period drama and escapism will become the breakout successes in 2017 and beyond.”

It could also be the year that the procedural comes back. The first fruits of the TF1-ProSiebenSat.1-NBCUniversal procedurals partnership are coming through, with *Law & Order*’s Chris Noth attached to *Gone*. **TBI**



Wentworth

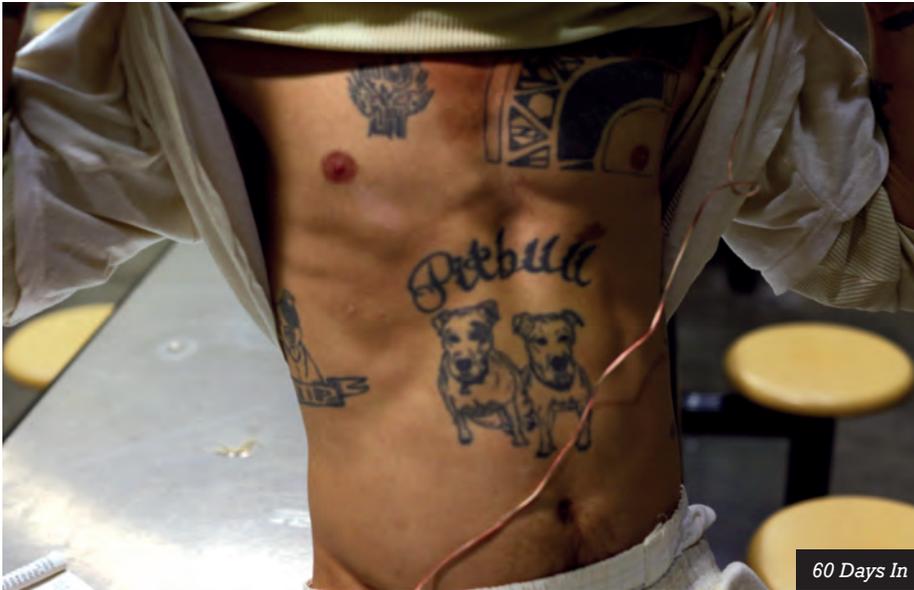
Prisons have long been a source of fascination for TV producers – as illustrated by series such as British sitcom *Porridge*, Australian soap *Prisoner Cell Block H* and HBO limited series *Oz*. Right now, though, there are more outstanding prison-themed shows than ever, across both scripted and factual television, reports Andy Fry

Prison might not be a fun destination for criminals, but it is for television producers, who return to the clink time and time again for inspiration. In terms of TV drama, recent prison-themed efforts include Netflix's *Orange is the New Black* and Foxtel Australia's *Wentworth*, while in the factual arena there are shows including A&E's *60 Days In* and Channel 4's *The Secret Life Of Prisons*. To these can be added the upcoming reboot of *Prison Break*, Icelandic drama *Fangar* and Sky's well-received eight-part series *Prison: First & Last 24 Hours*.

Explaining the recent boom in prison-themed factual production, Woodcut Media CEO Kate Beal sees it as "part of the true crime explosion that has been evident in recent years", though the success of *Orange is the New Black* has "also had an impact". As with other true crime subjects, "audiences love to learn about and analyse crime from the safety of their homes," says Beal, whose company made *Holloway: Women Behind Bars* for UK pay TV channel Crime & Investigation. "I also think there's a growing appreciation that prisons aren't just filled with the worst elements of humanity. There's more of a realisation that many of us

are just one wrong turn, one simple mistake, from ending up in prison."

This is a theme that producers use as a way attract audiences, agrees STV head of documentaries Michael McAvoy, who oversaw the production of *Prison: First & Last 24 Hours*, recently commissioned for a second season. "Our approach was very much to let the prisoners tell their own stories," he says. "There are clearly some people in prison who have done very bad things, but we were really interested in situations where the audience might start out with a negative impression of an inmate, but gradually shift position as they hear their story."



60 Days In

Access to prisons isn't easy to secure because it is such a politically-charged subject. However, projects have managed to get inside jails. ITV in the UK, for example, was granted access to Jersey's La Moye Prison (*Life at La Moye*), while RTÉ in Ireland aired *Life on the Inside*, a look at life in two Irish prisons. Produced by Midas Productions, the latter show followed the lives of six prisoners over the course of a year.

Access is especially powerful if you can link it to personal jeopardy, which is what Paris-based indie Pernel Media is seeking to do with *20 Years on Death Row*, a true crime series about death row inmate Keith Doolin, who many believe is innocent based on new evidence.

"The case of Keith Doolin is a story like no other," says Pernel Media president Samuel Kissous, who has secured direct access to the inmate. "It points to a major miscarriage of justice where the stakes for him could not be higher. The new evidence that has come to light could change everything. Keith's appeal process and investigation of the case will make a gripping documentary series."

While access is broadly speaking an asset to prison documentaries, producers need to be careful that it is being granted for the right reasons, says Woodcut's Beal. "We have turned down offers of access when we have felt that the authorities didn't want to share insights into a particular angle," she says.

"Producers need to be thinking about more innovative ways to get inside prisons. One alternative is to build a production around prisoner-shot mobile video footage."

In the UK, for example, Channel 4 has just aired a documentary called *The Secret Life of Prisons*, which used footage illegally taken by inmates inside jails to give a stark glimpse of the problems facing the prison service. The resulting film paints a picture of a system out of control, where prison officers have lost control of inmates, gangs prey on mentally-ill prisoners, and drug abuse is resulting in dozens of inmate deaths. Smuggled mobile phones are also a problem: prison authorities say they've been used to commission murders, organise escapes and smuggle machine guns into the country.

The most high-profile factual prison series in the market right now is *60 Days In*, an A&E project that has rated well in the US and been aired in more than 100 territories. In this case, seven volunteers agreed to spend 60 days undercover in an Indiana jail as part of an attempt to spot illegal activities that might



Prison: First & Last 24 Hours

It's very challenging to put together a factual prison series for a number of reasons. "One is that life in prison is actually quite boring, which is why we focused on the first and last days, times when inmates are dealing with heightened emotions," McAvoy says. "It also takes a while to get a feel for the rhythm of life behind bars. We put our crews behind bars for three weeks without cameras so they could adapt to that rhythm and build up the necessary trust with prison officers and inmates."

Over and above editorial considerations, there are key practical considerations. "We had to think about security, both for our crews and

people who might appear in the final edit," McAvoy says. "There were also legal issues. We were checking in with the courts right up to the day of transmission so that we didn't run into any contempt of court issues. Having enough strong stories that we were allowed to tell on air was one reason that we filmed across four Scottish prisons."

There are also access problems to consider. "We were in the fortunate position that the Scottish Prison Service was behind the project, because they wanted to show the progress that had made in prison officer-inmate relationships," says McAvoy.

be missed by prison officers and surveillance systems. The scheme was overseen by the local sheriff, but inmates, guards and most prison officials were kept in the dark. "I really believe there has been nothing like it on TV," says Elaine Frontain-Bryant, VP and head of programming for A&E.

Part of the appeal of the show was that viewers gained a deeper insight into the lives of prisoners, but "what really set it apart was the idea of sending innocent people into jail to get information for the good of the system", says Frontain-Bryant. "Audiences were really interested in the reasons why these people were willing to do this, and also in the possibility that they might get found out by inmates."

To ensure the volunteers were safe, they were given credible back stories and prepped on what to expect inside, says Frontain-Bryant. They were also given a safe word if they needed to be pulled out, although the fact none of the prison guards knew it meant there was inevitably an element of risk.

Frontain-Bryant makes no bones about the fact that the show was intended to be entertaining, akin in some ways to a reality or survival show. "However, it transcended those genres in a couple ways," she says. "Firstly, it provided some of the information the sheriff was after such as how drugs were getting into prison. Secondly, it proved to be a really transformative experience for those involved. It gave them a new appreciation of freedom."

A big question, of course, is how you replicate the undercover component once it has been on TV. Frontain-Bryant says A&E foresaw this issue, so decided to shoot a second season before the first was aired. Looking beyond these series, she says: "We have found a way to do it again in a different location, but obviously I can't say too much at this stage about how."

Access isn't always required to make a good prison show. "We made *The Krays: The Prison Years* for Discovery," says Beal. "That's the kind of prison-themed series where you tell the story through archive, interviews and reconstruction."

Another successful formula is Raw Television's *Banged Up Abroad*, which airs on Channel 5 in the UK and National Geographic Channel around the world. Now up to 80 episodes, the show (also known as *Locked Up Abroad*) tells stories of travellers who found themselves behind bars, sometimes through their own stupidity (e.g. drug smuggling), and sometimes through no fault of their own (as victims of gang scams).



Episodes involve interviews with the real protagonists and reconstructions using actors. Generally, the reconstructions will show conditions within foreign prisons.

For the most part, prison documentaries travel well. *Prison: First & Last 24 Hours*, an STV and GroupM Entertainment coproduction, for example, has been licensed as a format to Australian broadcaster Nine Network and is being sold in its completed version by distributor Sky Vision. As for *60 Days In*, it is being remade for the UK by indie producer Pulse Films.

The fact that most of the above prison-themed shows do well in international markets is no real surprise to A&E's Frontain-Bryant, who says: "We're dealing with questions of universal interest. People are interested in why someone has ended up in prison. They also wonder how they themselves would cope."

Issue of access and safety fade away when you're dealing with dramas about life behind bars. Shows that have taken this approach include *Wentworth*, *Orange is the New Black*, *Fangar*, *Unite 9* and *The Night Of*. Even the latest season of *The Affair* includes several sequences inside.

FremantleMedia Australia director of drama Jo Porter says *Wentworth* has been a big success for the company at home and abroad. A reimagining of *Prisoner Cell Block H*, it is now up to five seasons on Foxtel channel SoHo and has been sold to 90 countries worldwide, including a recent deal that will see all five seasons play out on pay TV platform Sky in Germany.

There are also successful German and Dutch remakes with a Belgian version on the way.

"I think the beauty of prison as a dramatic concept is that most people have never experienced it," Porter says. "It's a world with its own set of rules where what went on outside doesn't have much relevance. It also creates interesting storylines because it forces people to interact with each other in way they wouldn't usually."

Another positive in the making of prison dramas is that you can refresh the character pool as prisoners come and go, but there are also major challenges. "The big one is authenticity," Porter says. "You've got to go to the source – the prisoners, governors, warders – to make sure you're portraying this world realistically." This even relates to the props, because many day to day objects, such as phones and lighters, are customised for safe use in prison.

It's notable that a lot of prison-themed shows focus on women. Aside from *Wentworth* and *Orange is the New Black*, there are shows like *Fangar*, *Unite 9* and *Bad Girls*. The latter was a UK show that ran for eight seasons (107 episodes) from 1999 to 2006. According to Porter, "one reason for this is that you get such a wide range of female characters in female prison dramas – unlike mainstream drama. That doesn't just appeal to the audience but also to female actors, who can play parts that aren't usually on offer".

Many of the above dramas look like they will be around for a while, especially *Orange is the New Black*, which has been given an additional



Fangar



Vis a Vis

three-season commission by Netflix. Plus, as the *Wentworth* stats show, prison dramas travel as well as their factual counterparts.

This point is reinforced by the global appeal of *Orange is the New Black* and by Spanish drama *Vis a Vis*, which aired on Channel 4's streaming service Walter Presents as *Locked Up* after a strong showing on home soil.

Like so many women-in-prison dramas, there is a fish out of water feel about *Vis a Vis*, with the central character a timid accountant who ends

up among murderers and drug addicts after being duped by her millionaire lover. Speaking to the Radio Times, Walter Presents curator Walter Iuzzolino claimed the show's style suits international audiences, saying: "*Locked Up* is very shiny and feels American – you could imagine it being made by HBO – but at the same time it's got the darkness of a Scandi noir. And it really cracks the stereotype by having this action-movie quality and putting women at the centre of it."

The latest female-focused prison series about to hit the international market is Icelandic drama *Fangar*, which tells the story of an affluent woman who is sent to jail for a vicious assault that leaves her father in a coma. The show was created by Unnur Ösp Stefánsdóttir and Nina Dögg Filippusdóttir, both of whom also feature in the cast – as prisoners.

Speaking to TBI, they say: "This is an idea we had nine years ago after watching a documentary on Iceland's only women's prison. We started visiting women in prison and gradually developed the idea while we were working on other, mainly theatre, projects."

Core to the Global Screen-distributed drama is the idea that prisoners are often people who have just take a wrong turn – or have been subject to traumas like sexual abuse. "Our central character is arrogant when she goes in, but she learns from the other prisoners as the show goes on," say the two creators. "Just as we found when we met real-life prisoners, she realises that the other prisoners are really not that different to her."

Stefánsdóttir and Filippusdóttir identify another point of interest about female-themed prison shows, which is that they can be a metaphor for the way a lot of women feel inside jail and out: "The prisoners in our show aren't just the women behind bars, they are the ones with secrets that can't reveal or who are beaten down by their situations in day to day life." **TBI**

NATPE Hot Picks



THE SHOW: *Can I Follow You Home?*
 THE PRODUCER: TV Tokyo
 THE DISTRIBUTOR: Small World IFT
 THE BROADCASTER: TV Tokyo (Japan)
 THE CONCEPT: Stranded late-night commuters get a free ride home, in exchange for an insight into their lives

Can I Follow You Home? comes from the same genre as shows such as HBO's *Taxi Cab Confessions* and in parts apes the UK-created *Cash Cab*. Hailing from TV Tokyo, the show was first introduced internationally at the MIPCOM Treasure Box event in 2014, but now has Content Media-owned Small World IFT taking it to the wider industry.

The format follows two-person camera teams who offer stranded light-night commuters a free lift home in a taxi, in exchange for their stories, views and secrets. The random participants – who may be

clubbers, late night workers or someone heading home from an event – ultimately invite the crew into their homes to reveal more about their lives.

“In a social media age, everyone is following someone else,” says Small World president Tim Crescenti. “People create perfect versions of themselves for you to follow online, but this format breaks that down.”

Each episode comprises between two and four stories, with two lead and two faster ‘B’ plots. In Japan, it began as a special for TV Tokyo, but has gone on to become a weekly

primetime show with more than 40 episodes.

Crescenti says format buyers can consider it a relatively inexpensive option for a primetime slot, though shooting can be labour intensive as the random nature of the encounters will not always yield television gold.

“A French broadcaster recently told me they cannot find edgy, late night shows, but this can fill that gap,” says Crescenti, who adds an option deal with Zig Zag Productions has been struck in the UK, with agreements in Canada and the US close. “Ultimately, this is all about the storytelling,” he says.



THE SHOW: *My Man Can: Showdown*
THE PRODUCER: RedSeven Entertainment
THE DISTRIBUTOR: Red Arrow International
THE BROADCASTER: Sat. 1 (Germany)
THE CONCEPT: Rebooted version of popular studio gameshow

My Man Can was a hit in its home German market and internationally, selling in to 30 territories, and Red Arrow is hoping for more of the same for its new spin-off.

My Man Can: Showdown takes the core principle behind the original series – whereby women bet on their husbands completing physical challenges – and introduces new head-to-head and question-and-answer elements.

The new version is set inside an arena and the duels see two of the men going against

each other. A group of couples play, and the two women who back their men with the biggest bets set up a competition between their husbands.

The German version is in its second season on ProSieben's Sat.1 channel. "They've brought back one of their biggest shows – it still has five couples and the women betting on their husbands, but it is set up as more of a duel in the studio," says Harry Gamsu, Red Arrow International's VP, format acquisitions and sales.

"It's also not limited to physical games. It's big, bold family entertainment."

He explains that the Q+A rounds play on humorous elements, and mean the show is not just limited to physical games.

Red Arrow will be selling the format, which is notable for being one of a few German-originated formats to have become an international hit, at NATPE.

The German version is big. It's filmed in a huge two-tier studio and, running to four episodes, is event-sized TV. "If you bring something back, it needs to have oomph and this feels like event programming," says Gamsu. "Internationally it would not have to be on that scale, though."

The show also does not need to be limited to wives betting on husbands. In Argentina, free-TV broadcaster Telefe has reverse-engineered the concept and *My Woman Can* has run to three seasons.

Buyers who want a big, family entertainment show should look out for Red Arrow in Miami. "*My Man Can* has humour and comedy as well as tension and jeopardy, as you see how people in a relationship react under pressure," says Gamsu.

An altogether edgier format, *Kiss Bang Love*, will also be on offer at NATPE. From the *Married at First Sight* team, the show has couples kiss each other before deciding whether to then go on a date.



THE SHOW: *The Great Songwriters*
THE PRODUCER: JolyGoodTV
THE DISTRIBUTOR: DCD Rights
THE BROADCASTER: Channel 4 (UK)
THE CONCEPT: Seven music bios of famous singers and songwriters

With NATPE dedicating a whole strand to music rights and music on TV at this year's Miami event, DCD Rights' *The Great Songwriters* might strike the right note for buyers looking for tuneful television.

The show's interviews are conducted by Paul Toogood, the former band manager of

Echo & the Bunnymen and Betty Boo, who asks the artists about their inspiration, lives and how they create songs and music.

"He is there as a sounding board," says James Anderson, senior sales executive at DCD Rights, which is selling the show. "It covers a wide range of artists and we are really pleased great female songwriters such as Norah Jones and Carly Simon are featured."

The other artists featured are Chuck D, Ryan Adams, Jimmy Webb and Barry Gibb. The series was made by Toogood's London-based indie JolyGoodTV, and launched on Channel 4 in the UK in a late night music slot.

"In each episode there is an exclusive live performance, plus the artist explains their relationship with music and how they wrote some of their most famous songs.

"They work as great biographies as well as music programmes," Anderson says.

DCD will be launching it at NATPE and Anderson says Latin America is a bedrock for sales of music programming.



THE SHOW: *The Stream*
THE PRODUCER: Monster
THE DISTRIBUTOR: Nordic World, NBCUniversal
THE BROADCASTER: TV2 (Norway), NBC (US)
THE CONCEPT: A music talent show for the digital generation

THE SHOW: *Singer Swinger*
 (working title) [redacted]
THE PRODUCER: Telefe
THE DISTRIBUTOR: Keshet International [redacted]
THE BROADCASTER: Telefe (Argentina) [redacted]
THE CONCEPT: Glamour-filled music-based dating and reality series

There have been few attempts to create new spins on the music competition format since *Rising Star* failed to deliver on huge hype from the industry a few years back. *The Stream*, however, is one that has tried and – so far – succeeded to find the right formula.

The format moves the classic talent search format online, and shifts focus from the voice to the music itself, says distributor Nordic World’s VP of acquisitions, Ann Christin Silijan. “Other shows have a very different approach,” she adds.

The format’s search for the next Justin Bieber begins with members of the public uploading their music videos to an online platform. The 100-most streamed are then invited to a showcase, where they perform in front of music industry establishment.

Thirty go on to work with the executives for a week, with each honcho signing their best three artists. These competitors when go up against each other in a live weekly show, with their fate decided by the number of streams they get.

“The format allows you to build a fan base before the show is on air, and that is an interesting opportunity,” says Silijan. “The audience gets to know the artist before they are on the TV, and it is a show that tallies with how the music industry finds new music.”

Further to that, the innate multiplatform nature of the show has helped Nordic World in sales discussions. “Buyers want shows that work on different platforms, and that element is in-built into this format. It’s not a traditional talent show, but genuinely something new.”

Soft-launched last year, the format played well on debut broadcaster TV2 in Norway, leading Nordic World to sell the format to NBC for US broadcast television.

Paul Telegdy’s Universal Television Alternative Studio, which is part of NBCUniversal, will produce the US version in association with Monster, TV2, Nordic World and Little Hill.

Meanwhile, Nordic World and NBCU’s international arm share format rights and will be at NATPE searching for interested parties.

Singer Swinger (WT) is the first show to come out of a co-development deal between Telefe, the Argentinian free-TV broadcaster, and Keshet International, the production and distribution arm of Israel’s Keshet.

The format has elements of shows from different genres beloved of viewers in Latin America: the romance and glamour of a novella, the fun of a reality show, and the pull of a singing talent series.

“It’s a reality-dating hybrid show and a unique concept,” says KI’s head of Latin America, Kelly Wright. “It uses expertise from Keshet and Telefe, with a big digital aspect and an edgy reality element, and has telenovela glamour and the feel of a gala event.”

Essentially, the series seeks to pair off couples by having them live together in a house, where they rehearse a duet with another housemate that they then perform in the studio element at the end of the week.

“It’s a competition show for people looking for love, and they do it through music,” Wright explains. “They live together and perform together, and we see the rehearsals. The viewers can set up different pairings and make them compete, and each week people are voted off. The performances take place within a box on the stage.”

Telefe, which runs local versions of KI’s *Rising Star* and *Boom* locally, will launch the new show and KI will distribute it globally.

Both partners will own the format, with KI handling international sales. NATPE comes a little too soon for a full international push for *Singer Swinger*, but the distributor will soft launch it in Miami.

There is more to come from the KI-Telefe partnership. The pair says there will be two new entertainment shows a year coming out of the partnership.

The deal comes as KI sets up a regional production base, Keshet MX, and seeks to ramp up activity in LatAm (see page 8).

THE SHOW: *The Phone Secrets*
THE PRODUCER: Vivi la Vita
THE DISTRIBUTOR: Mediaset Distribution
THE BROADCASTER: TBC
THE CONCEPT: Couples leave their smartphones on a table, revealing their secret messages and habits

This controversial concept hails from Italy as one of indie prodco Vivi la Vita's first forays into formats after launching a dedicated genre division, and will debut to the international market at NATPE in Miami via Mediaset Distribution.

The format sees three couples sat around a table with their smartphones connected to an LED wall. One person per couple then unlocks their handset and hands control of it to their partners, who then get two minutes to go their personal messages, photos and chats. These are highlighted to the room, leading to revelations that then create animated discussions among the participants.

The players are ultimately competing to win an exotic holiday for themselves and their partners – if they are still speaking after the exchange.



"It is a very innovative mechanism that the couple suddenly becomes enemies, because one is a victim and the other an executioner," says Mediaset Distribution head of international sales Manuela Caputi.

Currently a paper format, there are plans to test the format as a pilot on young adult female-skewed channel La5. "It's an universal gameshow that can suit different countries no matter the local tradition or culture," says Caputi. "This is really a very innovative show for everybody in all the world."

"We are launching the format in Miami [along with reality series *The Bodyguard*] at NATPE, and we hope to develop collaborations with international broadcasters interested in testing and commissioning a pilot," she adds.

With Mediaset pushing into format creation and distribution, Caputi hopes to nurture partnerships with broadcasters and prodcos to co-develop more original ideas, and as such will be pitching to NATPE delegates. "We have a good creative hub and this can be an opportunity for unscripted formats," she says.



THE SHOW: *Hidden Singer*
THE PRODUCER: Ballandi Multimedia
THE DISTRIBUTOR: NBCUniversal International Formats
THE BROADCASTER: Nove (Italy)
THE CONCEPT: Talent meets reality meets gameshow format out of South Korea

NBCUniversal's Asian office saw *Hidden Singer* when it was on air on the JTBC channel in South Korea, and NBCU International Formats has now taken it into Europe.

The show sees superfans and stars sharing

the same stage, as the former compete to sound as close as possible to the latter. The studio audience can't see the singers, and votes, across five rounds, on the one that sounds least like the star. The star themselves also competes, and the Korean version has on occasion seen the performer voted for sounding least like themselves (they get to stay in the competition).

The rounds culminate with the contestant voted best at recreating the star's sound winning. The format has already sold into Thailand and Vietnam, and has now made it to Europe, on Discovery's Nove channel in Italy.

Ballandi is making the Italian show. *Barrie Kelly*, VP of international format production and development, NBCUIF, says the challenge with producing Asian-originated formats in the West is capturing the often brilliant central idea, while presenting the show in a way that Western viewers are familiar with and can recognise. "The ideas process in Asia is so different, but often brilliant," he says. "We needed

this to look and feel like a Western show."

The Italian version also adds in new elements, effectively making it a variety show. "In Korea the gameshow piece is everything," Kelly explains. "In the West it is more of a celebratory tribute show and there is a narrative thread."

Talkshow and tribute elements see the star and the superfans chat and interact, and the audience hearing their back stories. Visually, the Western version is different with a set made up of numerous LED screens that can be adapted as required for the competition, performance and reality elements.

Yvonne Pilkington, senior VP, format sales and production for NBCUIF, says the show could work as a special that then becomes a series, or as is the case with Nove and its 6x90mins version, launch directly as a series.

She has big ambitions for the show. "Talent resonates with people and everyone wants to see classic performers," she says. "Then you have the transformative power of amateurs performing, and this combines the two." **TBI**

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LAST WORD



DANNY KERSHAW

Local produce = good results

Viewers consume shows with little knowledge, or a passing acknowledgement, of what territory they originated in; the assumption is the UK or US, with the odd mention of ‘wasn’t *Big Brother* from the Netherlands?’. Those of us within the industry may fare a little better, but the truth is, there are a very small number of countries that disproportionately account for a large number of formats.

This imbalance is obviously felt acutely by producers in smaller markets, with an implied assumption that these territories are at an inherent disadvantage when it comes to creating original, successful content – something that I want to address. The powerhouse nations of content creation – the US, UK, the Netherlands and (more recently) Israel – haven’t got access to any hidden secrets of making successful shows, they just have more money, time and people to add to the task.

So how can we level the playing field, so smaller countries, and those with little history of exporting formats, can keep up with the big guns in the future?

It’s clear that in many smaller territories, an original domestic market has been allowed to atrophy, while schedules are awash with adaptations of the usual suspects of *The Voice*, *Got Talent* and *Dancing with the Stars*.

If creativity is fostered for the home market, formats will be developed that will perform well domestically, and in turn will attract the interest of international distributors.

Central to a drive to encourage more original content in smaller markets is the idea that nobody has a monopoly on good ideas, but it certainly helps if there are more of them going around: India’s Zee Entertainment launched a format ideas hub at MIPCOM this year, and in Ireland RTÉ’s Format Farm has seen a number of new ideas taken to market.

Going hand-in-hand with this idea of nurturing ideas is the importance of local talent. I recently spoke to a young Portuguese woman who, having completed film school and worked in the UK, had decided to return to Portugal to play a role in the country’s television industry rather than remain in the safer – albeit more competitive – world of TV in London. This approach is to be lauded, and ensuring young talent is invested in the local industry is key to driving new ideas, rather than keeping the creative process in the hands of older (and aging) execs under whom the current status quo has been allowed to develop.

Another element to consider is what should we consider success to be? Not every format can be, or should be, that fabled creature – ‘The Next Big Thing’. Instead of tilting at that windmill, producers might look to create shows of

a more modest scale, which contain at their heart a universal theme, with food, family, or romance three examples from many.

Success can also be a gradual, halting process, with various stages. Look at the talent format *Farm Factor*. Starting life in Ireland, the Good Company Productions creation aired for four seasons, before being adapted in Wales by Cwmni Da, receiving a BAFTA nomination and attracting the attention of Nordic World. The format has subsequently garnered interest worldwide, and has since received an eight-episode season on China’s CCTV.

The success of *Farm Factor* is a useful example of a locally developed show addressing the actual interests and needs of a local audience, and retaining this as a focal point. If (as is the case in Ireland, and indeed in Wales) you have a large rural population, with farming as a key industry and lifestyle, then it makes sense to make shows catering to it, rather than throwing another shiny-floor gameshow together and hoping for the best.

Some of the best-travelled formats from smaller territories have used this focus on of local culture and tradition to great success, while practices and habits differ massively across the world, they can do very well at inspiring pride and a feeling of inclusiveness among local viewers. Romania’s Media Factory gave the modelling competition genre a local twist with *Miss Country Girl* and follow-up show *I’m A Country Boy*, with local versions being made in countries including Ukraine, Thailand and China. The inclusion of local farming traditions, song and dance in the show was key.

With the advent of globalisation, content from smaller territories is getting increasing visibility on VOD platforms, but sales come from good ratings, and good ratings come from good ideas. Create content for local audiences, nurture talent, foster ideas, and success – and sales – will follow. **TBI**

Locally-developed shows that address the actual interests of the audience are successful. If you have a large rural population, with farming a key industry and lifestyle, make shows that cater to it, rather than throwing a shiny-floor gameshow together and hoping for the best



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