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## LA Screenings 2016

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# TBI at the LA Screenings



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+++US NETWORK PICK-UPS 2016-17+++US NETWORK PICK-UPS



**AMERICAN HOUSEWIFE** (Prod: ABC Studios, Kapital Ents **Dist:** Disney)  
**CONVICTION** (Prod: ABC Studios, Mark Gordon Co., eOne TV **Dist:** eOne)  
**DESIGNATED SURVIVOR** (Prod: ABC Studios, Mark Gordon Co., eOne **Dist:** eOne)  
**DOWNWARD DOG** (Prod: ABC Studios, Legendary TV **Dist:** Legendary)  
**IMAGINARY MARY** (Prod: Sony, Happy Madison, ABC Studios **Dist:** Sony)



*Notorious*



*Bull*

**BULL** (Prod: CBS TV Studios, Stage 29 Prods, Amblin TV **Dist:** CBS)  
**DOUBT** (Prod: CBS TV Studios, Timberman/Beverly Prods **Dist:** CBS)  
**THE GREAT INDOORS** (Prod: CBS TV Studios **Dist:** CBS)  
**KEVIN CAN WAIT** (Prod: CBS TV Studios, Sony Pictures TV, Hey Eddie Prods **Dist:** Sony)



**24: LEGACY** (Prod: 20th Century Fox TV, Imagine TV, Teakwood Lane Prods **Dist:** Fox)  
**APB** (Prod: 20th Century Fox TV **Dist:** Fox)  
**THE EXORCIST** (Prod: 20th Century Fox TV, Morgan Creek Prods **Dist:** Fox)  
**LETHAL WEAPON** (Prod: Warner Bros. TV, Good Session Prods, Lin Pictures **Dist:** Warner Bros.)  
**MAKING HISTORY** (Prod: 20th Century Fox TV **Dist:** Fox)



*24: Legacy*



*The Blacklist: Redemption*

**THE BLACKLIST: REDEMPTION** (Prod: Sony Pictures TV, Davis Ents, John Eisendrath Prods, Flatwater Scribe **Dist:** Sony)  
**CHICAGO JUSTICE** (Prod: Universal TV, Wolf Ents **Dist:** NBCU)  
**THE GOOD PLACE** (Prod: Universal TV, Fremulon, 3 Arts **Dist:** NBCU)  
**GREAT NEWS** (Prod: Universal TV, Little Stranger, 3 Arts **Dist:** NBCU)  
**MARLON** (Prod: Universal TV, 3 Arts, Wayans Brothers Ents, Bicycle Path Prods **Dist:** NBCU)



*Frequency*

**FREQUENCY** (Prod: Warner Bros. TV, Lin Pictures **Dist:** Warner Bros.)  
**NO TOMORROW** (Prod: CBS TV Studios, Electus **Dist:** CBS)  
**RIVERDALE** (Prod: Warner Bros. TV, CBS TV Studios, Berlanti Prods **Dist:** Warner Bros.)  
**SUPERCYBERGIRL** (Prod: Warner Bros. TV, Berlanti Prods, DC Ents **Dist:** Warner Bros.)

# PICK-UPS 2016-17+++US NETWORK PICK-UPS 2016-17+++US

**NOTORIOUS** (Prod: Sony Pictures TV, ABC Studios, The Firm **Dist:** Sony)  
**SPEECHLESS** (Prod: 20th Century Fox TV, ABC Studios **Dist:** Fox)  
**STILL STAR-CROSSED** (Prod: ABC Studios, Shondaland **Dist:** Disney)  
**TIME AFTER TIME** (Prod: Warner Bros. TV, Outerbanks Ents **Dist:** Warner Bros.)



Still Star-Crossed



Speechless

**MACGYVER** (Prod: CBS TV Studios, Lionsgate **Dist:** CBS)  
**MAN WITH A PLAN** (Prod: CBS TV Studios, 3 Arts Ents **Dist:** CBS)  
**PURE GENIUS** (Prod: Universal TV, CBS TV Studios, True Jack Prods **Dist:** NBCU)  
**TRAINING DAY** (Prod: Warner Bros. TV, Jerry Bruckheimer TV, Fuqua Films **Dist:** Warner Bros.)



MacGyver



Man With a Plan

**THE MICK** (Prod: 20th Century Fox TV, 3 Arts Ents **Dist:** Fox)  
**PITCH** (Prod: 20th Century Fox TV **Dist:** Fox)  
**PRISON BREAK** (Prod: 20th Century Fox TV **Dist:** Fox)  
**SHOTS FIRED** (Prod: 20th Century Fox TV, Imagine TV, Undisputed Cinema **Dist:** Fox)  
**SON OF ZORN** (Prod: 20th Century Fox TV **Dist:** Fox)  
**STAR** (Prod: 20th Century Fox TV, Lee Daniels Ents **Dist:** Fox)



Pitch



Shots Fired



Midnight, Texas

**MIDNIGHT, TEXAS** (Prod: Universal TV, David Janollari Ents **Dist:** NBCU)  
**POWERLESS** (Prod: Warner Bros. TV, DC Ents **Dist:** Warner Bros.)  
**TAKEN** (Prods: EuropaCorp TV USA, Universal TV **Dist:** NBCU)  
**TIMELESS** (Prod: Sony Pictures TV, Davis Ents, Kripke Enterprises, MiddKidd Prods **Dist:** Sony)  
**THIS IS US** (Prod: 20th Century Fox TV **Dist:** Fox)  
**TRIAL AND ERROR** (Prod: Warner Bros. TV, Barge Prods, Good Session Prods **Dist:** Warner Bros.)



Supergirl

**Key (full distribution companies' names)**

- CBS:** CBS Studios International
- Disney:** Disney Media Distribution
- NBCU:** NBCUniversal International Television Distribution
- Sony:** Sony Pictures Television
- Fox:** 20th Century Fox Television Distribution
- Warner Bros.:** Warner Bros. Worldwide Television Distribution





**T**he network series game is big business, and that's why ABC, CBS, Fox, NBC and The CW have ramped up the stakes for the 2016/17 season. Many of the new dramas and comedies are toplined by major TV and film stars, as the channel chiefs bet big on star power.

Michael Weatherly, Matt LeBlanc, Katherine Heigl, Ted Danson, Kristen Bell, Kevin James, Jenna Elfman, Kiefer Sutherland, Hayley Atwell, Allison Tolman, Minnie Driver and Bill Paxton all star in new season shows, aiming to score better than the heap discarded at the end of the 2015/16 season (see chart page 11).

# Star profile

The US broadcast networks are going big this year, with popular actors, producers and franchises anchoring new season schedules. Jesse Whittock talks with the studios as the LA Screenings get underway

*The Good Place*

“This year, we have more star-driven series, featuring top names synonymous with the comedy genre,” says Belinda Menedez, president, NBCUniversal International Distribution & Networks. “Created by Michael Schur, who also brought us *Parks and Recreation* and *Brooklyn Nine-Nine*, *The Good Place* stars Ted Danson and Kristen Bell, while *Great*

*News* is from Tina Fey and Robert Carlock [*30 Rock*], and Marlon Wayans stars in *Marlon*.”

Among CBS’s big new drama bets is *Bull*, the new vehicle for Michael Weatherly, who recently left his role as the cheeky Agent DiNozzo in the world’s biggest procedural, *NCIS*.

“Michael Weatherly is obviously, as a result of *NCIS* and evidenced by the huge ratings for his last episode, a global star,” says Armando Nuñez, CEO and president of CBS Corp.’s sales arm, CBS Global Distribution Group. “His role in this unique legal drama, which really looks into the psychology and process within juries and jury selection, is going to generate a huge amount of interest around the world.”

Heigl (*Grey’s Anatomy*) stars in another of CBS Studios International’s major new dramas, *Doubt*. She plays a defence attorney who falls in love with a man who may have committed a brutal murder. “Just her presence alone will generate interest,” says Nunez.

The series is also notable for being the first example of a broadcast network show casting a transgender actor, *Orange is the New Black*’s Laverne Cox, as a series regular.

Another, ABC miniseries *When We Rise*, focuses squarely on LGBT themes, charting the rise of the community’s civil rights movement from its infancy through to the modern day, with Guy Pearce (*L.A. Confidential*) and Mary-Louise Parker (*Weeds*) starring, Gus Van Sant (*Good Will Hunting*) directing and Dustin Lance Black (*Milk*) writing.

“ABC in particular has a very proud record of supporting diversity and this is another manifestation of that,” says Mark Endemano, senior VP and general manager of Disney Media Distribution, EMEA. “It’s got great auspices, and it’ll be a really interesting show with big name talent.”

“When you get stars of the ilk of Kevin James and Jenna Elfman coming back to the networks that made them big stars in the first place, you’re going to see a lot of buzz,” says Keith Le Goy, president, international distribution, at Sony Pictures Television, in reference to CBS comedy *Kevin Can Wait* and ABC’s *Imaginary Mary*.

The former marks comic actor, movie star and stand-up James’ return to the Eye network – and to broadcast television – following his nine-year run starring in *King of Queens* between 1998 and 2007.

*Kevin Can Wait* was CBS’s first pick-up of the new season, reflecting its commitment to multi-cam comedy, a genre in which both Fox and ABC have no new efforts in this year. “Everyone wanted Kevin, who is an icon of television and now a big movie star,” said Le Goy. “CBS made him a star and the reunion with them is an obvious and powerful one.”

The show follows James as a newly-retired New York cop and family man.

*Imaginary Mary* is Elfman’s latest network vehicle and return to ABC. Though she has appeared as a regular in NBC’s *Growing Up Fisher* and starred in CBS’s *Accidentally On Purpose*, she’s best known for ABC romcom *Dharma & Greg*. Her new show is about a child-phobic career woman whose imaginary childhood friend re-emerges after she moves in with her boyfriend and his kids.

Big name producers remain in vogue this season. Warner Bros. has again looked to Greg Berlanti, with the *Legends of Tomorrow*, *Arrow* and *The Flash* helmer overseeing production of The CW’s animated series *Riverdale*, which is based on characters from Archie Comics.

20th Century Fox Television Distribution, whose international president Marion Edwards describes the 2016/17 slate as “the biggest I can remember”, will be offering up *Empire* writer Lee Daniels’ latest



## INSIDE THE STUDIO: NBCUNIVERSAL

NBCUniversal International Distribution & Networks president Belinda Menendez says buyers can find plenty of variety of her slate this year, much of which will be familiar in some fashion.

"A common theme we saw in this year's slate was mining popular, established content and successful brands," she says. "We have *Taken*, which is executive produced by Luc Besson and adapted from the hit films of the same name; *Emerald City*, the modern and dark re-imagining of the classic tale *The Wizard of Oz*; and the supernatural series *Midnight, Texas*, which is based on the popular novels by *True Blood* creator Charlaine Harris."

Those three are high-concept, but on the more procedural side is *Pure Genius*, which stars Dermot Mulroney as a veteran surgeon who is tempted to join tech billionaire (Augustus Prew) at an ultra hi-tech Silicon Valley medical facility. "It comes from Jason Katims, who is best known for the critically-acclaimed series *Parenthood* and *Friday Night Lights*," says Menendez.

**7 new series 4 dramas 3 comedies**



*Taken*

effort, *Star*, which is about an emerging girl group. "It's a combination of *Dream Girls* and *Destiny's Child*," says Edwards, adding it differs from *Empire* because "it's more Beyonce than hip-hop".

ABC, meanwhile, has once again leaned on the talents of Shonda Rhimes, commissioning Romeo and Juliet-inspired *Still Star Crossed*. "It's another Shondaland show and it is a fascinating premise," says DMD's Endemano. "This goes back to 16th century Verona – it's a period drama that picks up where Romeo and Juliet left off."

Warner Bros. International Television Distribution was the one studio



*Still Star-Crossed*

## INSIDE THE STUDIO: DISNEY

The 2016/17 season sees a smaller selection of new network shows from Disney Media Distribution than in previous years, in part down to a large number of returning series and in part down to ABC ordering shows from various studios.

"We've got the largest number of returning series from last year that I can remember," says Mark Endemano, DMD's senior VP and general manager, EMEA. "We've got twelve returning dramas and two comedies, which inevitably means fewer slots for new shows."

One of those that did make it, *Still Star-Crossed*, is from the prolific Shonda Rhimes (*Grey's Anatomy*, *How to Get Away with Murder*, *The Catch*). Set in 16th century Verona, Italy, after the conclusion of the Romeo and Juliet story, it stars the likes of Grant Bowler (*Defiance*) and Gregg Chillin (*Da Vinci's Demons*).

"The universal themes are going to be romance, intrigue and sexiness, which are the hallmarks of Shonda's shows, but now in the context of a period drama," Endemano says. "Plus it's the 400th anniversary of Shakespeare's death, so it's timely."

Other newcomers for ABC are *American Housewife*, which stars Katie Otto (*Mike and Molly*) as an mother of three who lives in a community of 'perfect' families in Westport, Connecticut; and *When We Rise*, a miniseries charting the history of the LGBT human rights campaign from the 1960s to the modern day. *Milk's* Gus Van Sant and Dustin Lance Black are attached as director and writer, respectively.

**3 new series 2 dramas 1 comedy**

that declined to be interviewed, but will also be offering series that speak to the major development trends this season.

*Training Day*, *Lethal Weapon* and *Frequency*, for CBS, Fox and The CW respectively, began life as movies and have been adapted for television, following on from the likes of *Rush Hour*, *Minority Report* and *Limitless* (all since cancelled).

*Time After Time*, a mid-season drama based on Karl Alexander's 1979 novel is one of a number of time travel-related series, while *Powerless* is a new take on a superhero show.



INSIDE THE STUDIO: FOX



Son of Zorn

Marion Edwards, international president at 20th Century Fox Television Distribution, says this year's slate at Fox is "the biggest I can remember in the 24 years I've been here".

The 21st Century Fox-owned studio has some of the biggest name efforts on show this year in the shape of *24: Legacy* and *Prison Break*, plus a TV adaptation of *The Exorcist*.

*24: Legacy* stars Corey Hawkins (*Straight Outta Compton*) as a US war hero who has to stop a terrorist threat on American soil. "We always felt *24* was really strong IP, but could you have it without Kiefer Sutherland? I can now

say for sure that, yes, you can," says Edwards.

The new *Prison Break*, back after seven years, returns with all of its key cast, including Wentworth Miller and Dominic Purcell. "It's probably the most anticipated show that is going to screen this year," says Edwards. "It has exactly the same cast, it's action-packed, beautifully-produced and an interesting new angle to a much loved franchise."

*The Exorcist*, meanwhile, based on the 1971 novel of the same name, stars Geena Davis, and is "like watching the film", says Edwards, who warns: "Don't watch it in the dark! It's very scary and moves like a movie."

Also on the drama front are procedural *APB*, which follows a tech billionaire who takes over a Chicago police precinct; *Pitch*, which is the story of Major League Baseball's first female player; *This is Us*, an NBC series from the writers of *Crazy, Stupid Love* about a group of seemingly unconnected 36-year-olds; Lee Daniels' (*Empire*) latest effort, *Star*; and *Shots Fired*, which Edwards says is as a "ripped-from-the-headlines crime drama with a twist".

On the comedy front, *Making History* is a time-travel comedy; *The Mick* is a single-cam effort from *It's Always Sunny in Philadelphia* scribes John and Dave Chernin; *Speechless*, which stars Minnie Driver as the straight-up mother of a disabled child and will air on ABC; and *Son of Zorn*, one of network television most off-the-wall new season efforts.

"It's truly a unique show – a mix of live-action and animation," says Edwards. "Zorn is an animated He-Man character living in Orange County trying to reconnect with his son after years away fighting. It's very different, funny and original."

**12 new series 8 dramas 4 comedies**

INSIDE THE STUDIO: SONY

Sony Pictures Television is this year producing shows for ABC, CBS and NBC, which international distribution president Keith Le Goy says is "a strong package of programming for a lot of different networks".

"Being an independent studio gives us the flexibility to go and make the leading drama for NBC in the prime Monday 10pm slot [*Timeless*], the biggest new comedy on CBS with the return of Kevin James [*Kevin Can Wait*], and *Notorious*, taking the 9pm slot on Thursdays on ABC, which is extraordinary," he adds.

*Notorious* stars Daniel Sunjata and Piper Perabo and is inspired by the true-life stories of famed criminal defense attorney Mark Geragos and cable news producer Wendy Walker, who worked together to catch criminals and ratings.

"It's glamorous, fast moving and people like to see that on broadcast television," says LeGoy. "Not only that, but it has broken into Shondaland [the Thursday prime programming block] and that's a testament to what ABC think about the potential."

*Timeless* will be another to watch. It has the 10pm slot, which last year was given to *Blindspot*, which has gone to a second season. *Timeless'* production team comprises Sony and Davis Entertainment – as with *The Blacklist* and new season effort *The Blacklist: Redemption*, but this time with *The Shield* creator Shawn Ryan and Erik Kripke.

The show follows a historian, soldier and a physicist who travel back in



Timeless

time to stop an master criminal from changing America's future.

"NBC thinks *Timeless* can do a couple of things: one, you're looking at the most solid genre on television: crime fighting, but in a different context," says LeGoy.

"The other thing is it combines the story of the week – or time travel of the week – with a richer experience as the exposition of the mystery and the characters unfolds."

**5 new series 3 dramas 2 comedies**



## INSIDE THE STUDIO: CBS

"What people always love about CBS is for the most part a stability and broadness to the schedule and programming from the studio that is very appealing to the variety of clients we have around the world," says Armando Nuñez, president of CBS Global Distribution Group.

The studio has buzzy dramas in the shape of *MacGyver*, *Doubt* and *Bull* for the CBS network, plus *No Tomorrow*, an adaptation of a Globo format from Brazil; and comedies *Man with a Plan* and *The Great Indoors*.

*Man with a Plan* is notable as Matt LeBlanc's reunion with CBS Corp. CEO and executive chairman Les Moonves gave the star his break-out role as Joey Tribbiani in *Friends* while running Warner Bros in the 1990s.

"Matt LeBlanc is very much associated with Joey, but he is a big star who carries a show," said Nuñez.

*The Great Indoors*, meanwhile, follows *Community* star Joel McHale as a globe-trotting adventure-journalist who is given control of a newsroom full of Vice-style millennial-aged writers.

"Both comedies are somewhat similar in nature; big, old-fashioned sitcoms that are not trying to be too cute," says Nuñez.

**6 new series 4 dramas 2 comedies**



For CBS, the reboot trend sees it updating 1980s crime sleuth series *MacGyver*. "It was and is a very recognisable franchise around the world; one of the only shows from the 1980s that actually travelled well [globally] on the limited number of channels back then," says Nuñez. "'MacGyver' has even become a verb in the Oxford English Dictionary." (To 'Macgyver' is to make or repair an object in an improvised or inventive way, making use of whatever items are at hand.)

Whether or not studios favour reboots because they are cheaper to develop or have in-built fan bases, "it's not just about pulling an IP out of your library and doing it," says Nuñez. "We managed it with success with *Hawaii 5-0*, but it's tricky because you're bringing something with brand recognition but not necessarily much awareness of the specifics."

NBC is reworking Liam Neeson action trilogy *Taken*. "Series based on existing IP are beneficial for international buyers, as they have built-in brand awareness, which helps them stand out from the crowd, and with an existing fan base, these series are easier for our clients to promote," says NBCU chief Menendez.

Time-travel series can be seen in several slates this year, with *Time After Time* joined by Fox's *Making History*, and NBC handing its coveted 10pm Monday slot to the Sony Pictures Television-produced *Timeless*.

"Shows like *11/22/63* and our own *Outlander* cover the same dynamic, involving that huge curiosity within people that wonders what it would be like to live in a different time and place," says Sony's LeGoy. "You experience a different kind of life, you know more than the people living in that era and that's a big curiosity."

*Making History* follows two modern men who travel back to 1775 to ensure the American Revolution takes place after one inadvertently stops it. "It is a very different take on time travel: messing everything up and then having to go back and fix it," says Fox's Edwards.

On the superhero front, changes are afoot. *Supergirl* has been moved from CBS to The CW and ABC has axed *Marvel's Agent Carter* and

*Marvel's Most Wanted*, the latter of which did not pass the pilot stage.

Warner's *Powerless*, which is set for NBC, is a workplace comedy about the staff who clear up after the DC Universe superheroes. It follows Vanessa Hudgens as a claims adjustor for the likes of Wonder Woman and Aqua Man, working under a nightmare boss.

For international buyers, especially channels such as TFI and RTL in Europe, a worry has been a lack of procedurals coming from the networks. Studio sales bosses say this season goes a long way to allaying those fears.

Sony's Le Goy says *The Blacklist: Redemption*, which is a spin-off of NBC's *The Blacklist*, plus *Timeless* and ABC's *Notorious*, which has broken into the Alphabet network's Thursday Shondaland block, are three that meet this demand. "This is a great response to that," he says, adding they offer "the satisfaction of the weekly resolution and the deeper satisfaction of the mysteries resolving over longer storylines".

Fox's *APB*, meanwhile, is a "strong procedural drama" about a young internet billionaire who attempts to improve a police precinct using technology. "It's very fast-paced with a case each week to solve," says Edwards.

NBCU's Menendez points to the fourth instalment of Dick Wolf's *Chicago...* franchise, *Chicago Justice*, as another example. "Procedurals appeal to a broad audience and continue to perform very well internationally – especially top-quality series like those in the *Chicago* brand which come from a world-renowned producer and consistently garner impressive ratings," she says.

Disney's Endemano says there is a definite skew in favour of serialised series this season, but that the Mouse House has "always wanted the right balance for our EMEA clients". He adds: "For them, procedurals in particular tend to play really, really well," he adds. "Free-to-air broadcasters always want to get that mix of procedural, which ensures story of the week content, with the event, serialised dramas." **TBI**



# NETWORK CANCELLATIONS



*The Player*



*The Grinder*



*The Mysteries of Laura*



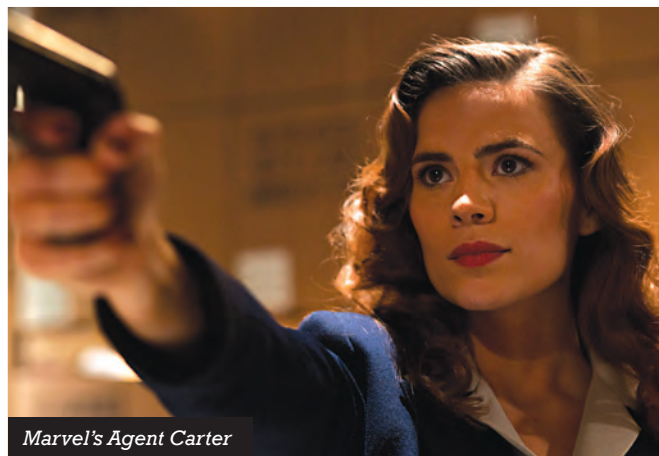
*CSI: Cyber*



*Rush Hour*



*The Muppets*



*Marvel's Agent Carter*



*The Good Wife*

*Agent Carter* (ABC)  
*Bordertown* (Fox)  
*Castle* (ABC)  
*CSI: Cyber* (CBS)  
*Galavant* (ABC)  
*Game of Silence* (NBC)  
*The Good Wife* (CBS)  
*The Grinder* (Fox)

*Heroes Reborn* (NBC)  
*Mike & Molly* (CBS)  
*Minority Report* (Fox)  
*The Muppets* (ABC)  
*The Mysteries of Laura* (NBC)  
*The Player* (NBC)  
*Rush Hour* (CBS)  
*Telenovela* (NBC)





# TBI Scripted

Television Business International

# Survey 2016

Drama's prolonged period in the sun doesn't seem like ending any time soon. In fact, it feels like it might go on longer than anyone could have predicted. In the US, there are approaching 70 cable channels commissioning shows, while Europe has seen an explosion of channels and producers coming together to create programming that would have been unimaginable in scale and volume a decade ago.

That's why we conducted the TBI Scripted Survey 2016, to shed light on why, where and how the genre is evolving, tackling the big issues with anecdotal evidence and data gathered from the world's top scripted executives. Lights... camera... action!

## WHY IS THERE SO MUCH SCRIPTED PROGRAMMING IN THE GLOBAL MARKET?

The sheer amount of high-end shows regularly launching is staggering. MIPTV and MIPCOM have become mini-festivals where international shows matching the quality of US drama and comedy debut, while smaller events such as Berlinale and Series Series are acting as conduits for premium drama, and spaces for creators to come together.

Why is there so much drama? For many we sampled, the answer is simple. "It's because there have never before been [so many] channels and platforms with that huge need for content," says Jörg Graf, RTL's executive VP of productions and international acquisitions.

"There's a huge demand for drama from all players, SVOD platforms or broadcasters," confirms Patrick Nebout, founder of French prodco Dramacorp. "This is, in its turn, driven by international audiences'

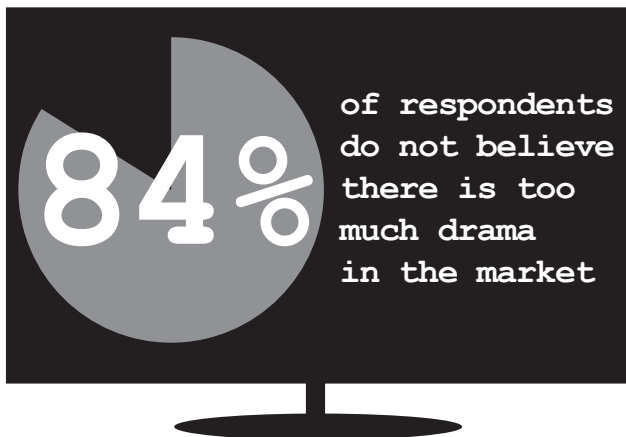
hunger for great stories. In a very unstable world, great storytelling can help us better understand the world we live in."

Keren Shahar, managing director of distributor Keshet International puts the demand down to "the proliferation of OTT platforms – Amazon, Netflix and local services – who have the budget to invest in original dramas".

Javier Méndez, who is head of content at Spain's Mediapro, says there has, specifically, been a boom in high-end, limited run series. "There is a



**"New platforms and traditional broadcasters are seeking brand-defining original material that sets them apart in an increasingly competitive marketplace"**  
**Peter Iacono, Lionsgate**



great demand for this kind of content all over the world," he says. "People are used to seeing eight-hour stories. We need to provide their 'food'."

Zodiak Rights' head of scripted Caroline Torrance adds that the advent of binge-watching and SVOD networks mean that "viewers feel they are able to commit to eight-to-ten-part-series, as they have the flexibility to watch when they want".

Peter Iacono, president of international television at US studio Lionsgate Television says: "New platforms and traditional broadcasters are seeking brand-defining original material that sets them apart in an increasing competitive marketplace."

The evidence shows the scope and ambition of producers and broadcasters have significantly expanded in recent years – with so much well-produced, well-cast and well-written content around, producing a sub-standard product is potentially devastating for channel brands seeking to



stand out in a fragmenting landscape. “Everyone has recognised that what original programming provides is the ability to build a distinctive brand,” says Carmi Zlotnik, managing director of US premium cable channel Starz.

“We all have come to virtually the same conclusion: the content with the most stickiness for consumers and our business partners is drama,” adds Harold Gronenthal, executive VP, programming and operations for AMC Global and Sundance Channel Global. “A hit drama – a critically-acclaimed drama – can become a truly defining programme.”

For Gene Stein, president of Gaumont Television, drama has filled a hole in the wider media market, by taking the “opportunity to serve a

market that is increasing left behind by the major film studios: character-driven projects with A-list talent”.

Many agree that TV drama now fills a space once occupied by features. “TV drama is taking the place of mainstream films, in a movie landscape dominated by franchise-based blockbusters and small indie or authorial movies,” says Maria Cervera, director of international coproductions at Spain’s Plano a Plano. Put another way, Stephen Cornwell of *The Night Manager* producer Ink Factory, says: “A broadly based, intelligent and engaged audience that used to look to cinema to provide them with interesting and challenging stories and characters increasingly now looks to longer form and continuing narrative on television to do that for them.”

## WHAT IS THE MOST IMPORTANT WAY IN WHICH NETFLIX HAS CHANGED THE TV DRAMA MARKET?

It is impossible to talk about the international TV drama scene without asking executives in the business about Netflix. The US streaming service has fundamentally changed the way people watch scripted content with a ripple effect impacting all areas of the industry.

For ZDF Enterprises president and CEO Alexander Coridass, Netflix



“Opening Anglo-Saxon markets to non-English-speaking programmes [is the biggest way Netflix has changed the market]”  
**Alexander Coridass, ZDFE**

has helped drive the rise of non-English-language programming. The biggest change Netflix has made? “Opening Anglo-Saxon markets to non-english speaking programmes,” Coridass says. “Netflix is to date the only real global player, eliminating all language or territorial borders,” says Beta Film managing director Moritz von Kruedener making an associated point. “Netflix makes local content global.”

Despite being a US company, commissioning out of the US, and largely based in Los Angeles, the streaming service’s 130 country launch earlier this year took it to a different level internationally.

The “impact was felt at a local level around the world,” says Red Arrow International’s senior VP of scripted acquisitions and coproduction, Amelie von Kienlin, although the global footprint would be more impressive if there were accompanying numbers, adds Nick Thomas, practice lead, digital media at research firm Ovum: “It can access 130 countries instantly, which is great, but the lack of audience data it provides is a problem,” he says.

Stephen Cornwell of *The Night Manager* prodco The Ink Factory says the biggest impact Netflix has had is “making large scale, high visibility, high cost and often very creatively- and commercially-bold commitments to projects and talent. The impact of this has been both good and bad for producers and talent, but it has certainly had a huge impact in terms of catalysing and elevating long form drama in all sorts of interesting and exciting ways”.

Netflix’s international output is limited compared to what it is ordering



from the US, but the volume is increasing. Pascal Breton’s Federation makes *Marseille*. “Netflix is doubling the drama market and giving a global dimension to shows that were once only local,” he says.

The international roll out means producers can reach, with one deal, reach a global audience. The challenge and opportunity for distributors is cutting that type of worldwide deal, which is not how business has been traditionally done.

BBC Worldwide’s executive producer for international drama, and founder of indie prodco Cosmopolitan Pictures, Ben Donald, says “global rights and windowing” are the biggest change Netflix has had on the market.

“Traditional distribution windows are no longer reliable, and they have become the first end-user who truly buys for the world,” says Dan March, managing partner at *Trapped* distributor Dynamic Television of the rights issues. “Our industry remains in the spin cycle of change and Netflix is the washing machine.”

Ampere Analysis research director Guy Bisson notes that “the potential to do global deals is attractive, but it depends on what they pay, plus sellers still need to encourage multiple buyers to get and build longer term the best prices.”

It is clear, meanwhile, that Netflix and its SVOD brethren are hungry beasts. Henrik Bastin, CEO, of Fabrik Entertainment, which makes *Bosch* for Netflix rival Amazon, says: “Netflix has driven the need for volume and competition to unprecedented levels, and this is fed by their burn rate: shows are released for binge watching, and this is really what adds to the need for more and more content.”

“[Netflix is] making large scale, high visibility, high cost and often very creatively- and commercially bold commitments to projects and talent”  
**Stephen Cornwell, The Ink Factory**







## WHAT IS BEST WAY TO SOURCE IP?

An overwhelming 92.6% of our respondents say good ideas can come to the fore in the current market environment, with just 7.8% undecided and none – 0%, nada, zero, zilch – believing they would be ignored.

“IP can come from anywhere today,” says David Ellender, president of distribution at US prodcos Sonar Entertainment. “No-one in programme development is waiting for the next great script to land on their desk, although that can still happen.”

Many use the line that good ideas can come from anywhere, and this is true to an extent. Georgia Brown, executive VP, global scripted and unscripted at FremantleMedia gives the example of a UK show currently in development that is “off the back” of a piece of IP owned by the Bertelsmann Music Group, which is part of Fremantle’s parent company.

“You have to think outside the box and securing IP is about having a clear strategy surrounding what you will do with it, as well as the most creative and passionate response to the material,” she says.

Certain sources seem to be more fruitful than others. Numerous executives cite books, graphic novels and established IP as a key route to market. “There has been a shift towards more authored and less producer-driven content origination,” says Jez Swimer, head of development at UK-based Leopardrama. “Working off established brands has the advantage of leaning on an established brand and a pre-existing relationship with the audience.”

Recent examples include the BBC working with Lookout Point and The Weinstein Company to create a new version of Russian classic novel War and Peace. The BBC also commissioned ITV-owned Mammoth Screen



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**David Ellender,**  
**Sonar Entertainment**

to reboot 1975 series Poldark, which itself was an adaptation of Winston Graham’s mid-20th century novel series.

Ben Donald, BBC Worldwide’s drama chief, says there has been “an inflationary rush on branded or iconic IP”, but adds “There is still a lot of work to be done by the producer and writer to make it work and original for the grammar of television”.

Katrina Neylon, executive VP, sales and marketing at Studiocanal, says her company’s development team is constantly considering which of the 5,000 titles in its library could be reworked as a drama series.

Comic books have become a more important part of the ecosystem since Warner Bros. and The Walt Disney Company started really mining the DC Entertainment and Marvel Entertainment Universes. This has had a knock-on effect, says Dan Whitehead, head of drama and digital at research house K7 Media.

“The canniest media companies are now reaching out directly to TV producers, and helping to drive development, rather than waiting for licensing deals to come along,” he explains. “This is particularly notable in comics, no doubt emboldened by Marvel’s success as a studio in its own right.

“Larger indie publishers like IDW and Boom are now actively pushing their titles for TV adaptation, and staying involved in the process. The production model these days is far more intimate and collaborative than the ‘sign and forget’ IP deals of yesteryear.”

Indeed, for many, there is nothing more important than the relationship. “We have found that the most valuable way to source new projects is through relationships with behind-the-camera talent,” says Michael McGahey, VP of series at LA-based Marvista Entertainment.

“The production model these days is far more intimate and collaborative than the ‘sign and forget’ deals of yesteryear”  
**Dan Whitehead, K7 Media**



“The creative community is innovative and resourceful,” adds Carmi Zlotnik, managing director of premium cable net Starz. “Staying in contact with smart and creative people is important.”

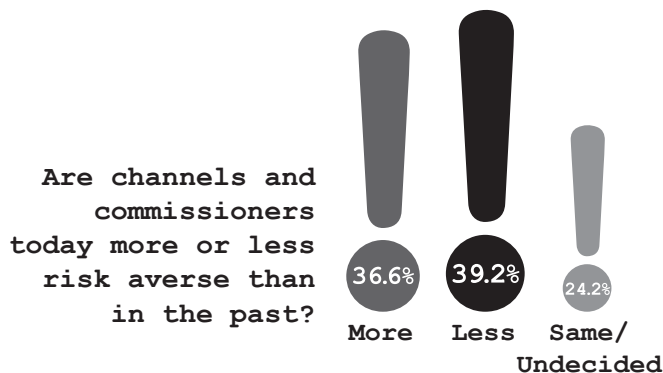
Endemol Shine Studios chief Sharon Hall says ideas are “literally coming from every corner of the globe. Here at Endemol Shine, we are fortunate to have access to hundreds of successful formats and many of the top writers, producers in the world”.

For broadcasters, it is about using those relationships alongside, and in combination with, their own intelligence about their audience. “The most fruitful way for us is to combine individual external know-how with our internal experience and our deep knowledge about our target audience,” says RTL’s chief buyer Jörg Graf.

A number of respondents such as Mediapro Group’s head of content, Javier Méndez, connect modern development trends to current affairs. “We’re seeing an increasing amount of drama connecting with current events or the fears of society: the danger of the internet and living in a digital world, and issues like immigration,” agrees About Premium Content co-founder Emmanuelle Guilbart.

Bearing this out, the likes of Showtime have been tapping into real life events for inspiration in recent years – terrorism-themed *Homeland* is now into a fifth season, while new series *Billions* looks into high-level corruption within hedge funds.

Marc Lorber, a consultant at Lionsgate Television and formerly head of programming at HBO Europe, says one upside in today’s market is “that ideas and creative DNA are flowing across what has become a flat world.”





## WHAT IS THE MOST IMPORTANT CHANGE IN THE WAY THAT SCRIPTED PROJECTS ARE FINANCED?

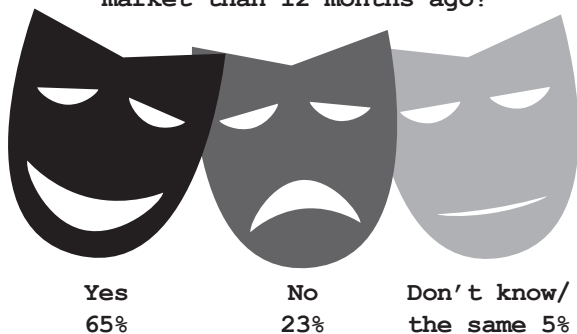
There are an unprecedented number of ways to get a scripted project funded in the contemporary drama market.

It used to be so simple: “In the past there was basically one path to creating a series: to develop a script and shoot a pilot, and then hope the pilot would be ordered to series by a network,” says Carrie Stein, executive VP, global productions at Entertainment One. “Today, there are a number of ways to finance a series and many of those paths no longer rely as heavily on pilots or on a single domestic US buyer.”

The start point is no longer necessarily a single linear broadcaster in the producer’s local territory and Content Television president Greg Phillips notes: “The traditional methods continue, but there are new ways to fund scripted projects from different sources, diminishing total reliance on a single primary broadcaster.”

As budgets and the volume of drama ordered increase, so does the complexity of financing a project, and the array of options available to both buyers and sellers. It is clear that that, from film finance models,

Overall, is it a better drama market than 12 months ago?



coproduction, greater deficits, to an array of new buyers, content companies have a greater range of options than ever.

Within that changing landscape the role of the distributor is changing. “There are now as many models and solutions available as there are types of scripted shows,” says About Premium Content’s Emmanuelle Guilbart. “We are observing a massive transfer of risk from the creators [producers and broadcasters] toward distributors.”

Stuart Baxter, president, eOne Television International, underlines the point that sales houses are taking on more of the financial burden and risk. “With so many new commissioners participating, most will only part-finance a show – so the distribution community is carrying much of the risk on a much broader and larger drama slate,” he says.

After a wave of consolidation, the biggest distribution firms can now offer a greater proportion of a budget upfront than ever before, and “distributors are putting up larger distribution advances, and becoming coproduction and development partners on projects,” says Zodiak Rights’ drama boss, Caroline Torrance.

What is the single most important change in the way that scripted projects are financed? “The proliferation of tax credits, which has caused more money to be available, but also price inflation,” says Maartje Horchner, head of acquisitions, All3Media International. “This has

inadvertently spawned the coproduction market.”

As movie talent migrates to TV, the television business is appropriating the financing models seen in the features world. The sheer scale (and cost), meanwhile, of many contemporary dramas, as well as the availability of local tax incentives, have driven coproduction to a new level.

The move to coproduction clearly affects the creative process, as



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**Carrie Stein, eOne Television**

broadcasters readily admit. “There are a lot of projects that are too expensive for one company to produce – so you need to find partners – this influences the story of course,” says Karni Ziv, head of the drama and comedy department at Keshet Media Group. “It needs to be a story in which the core is touches on universal themes, like *The A Word*, which touches the basic fears and hopes of families all over the world.”

The actual proportion the commissioning broadcaster can fund is often shrinking as programme budgets increase in size faster than pots of commissioning money. These shrinking budgets are driving the copro activity and partners increasingly want to get involved early in a hyper-competitive drama market.

“Budgets decreasing within broadcasters ensures a strong need for coproduction, this isn’t new however, but the financing is put together much earlier,” says FremantleMedia’s executive VP, global scripted and factual Georgia Brown.

She adds that Fremantle is “funding scripts and treatments to be able to secure rights and financing later in the process”.

There is also a greater buy-in from the US in term of copros and international drama, adds Sarah Tong, sales chief at UK-based Hat Trick International. “Big buyers such as US broadcasters and digital platforms are now not just looking at US content, but happy to look further afield for coproductions, presales and even straight commissions,” she says.

ITV Studios Global Entertainment executive VP Ruth Clarke and Dramacorp founder Patrick Nebout, meanwhile, sum up the thoughts of



“We are observing a massive transfer of risk from the creators towards distributors”  
**Emmanuelle Guilbart, About Premium Content**

many. “There is no room for pre-prescribed funding models anymore. Expectations are higher, budgets more ambitious and networks often unable to fully fund a commission – getting a show from paper to screen requires ever more creative funding models,” Clarke says.

For Nebout, “anything goes”. He says: “The most important change is that suddenly, all financing models are possible. Every project has its own financing set-up.”





## HOW HAVE VIEWING HABITS CHANGED THE WAY DRAMA IS PRODUCED AND SOLD?

With global services to feed, the search for universal drama stories has become keener. Paradoxically, very local-specific stories can also find new homes on streaming services too, where success isn't measured in viewer numbers. What is clear is that at an inception and development level, the process has become more creator-driven. SVOD services are keen to indulge passion projects from big-name talent and also will hand greater control to a creative team than a traditional broadcaster or pay net.

"Dramas are much more creator-driven than ever before," says Michael McGahey, VP of series at LA-based Marvista Entertainment. "Even traditional cable series are being designed with binge-viewing in mind. Programming is burning off quickly and now that the Pandora's box has opened, this model is here to stay."

SVOD calls for longer stories, and cliffhangers that should drive immediate viewing, not those demanding an appointment-to-watch next week. It also, arguably, allows for more nuanced storytelling.

"Binge viewing has had an impact on story arc and character



"Even traditional cable series are being designed with binge-viewing in mind"  
**Michael McGahey, Marvista**

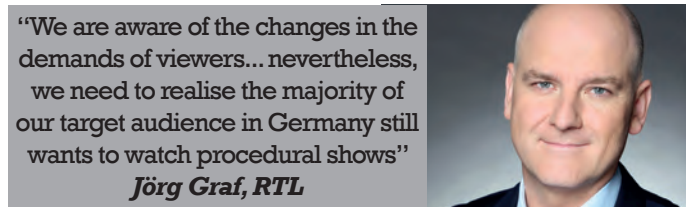
With so many partners fighting for the best ideas, straight-to-series orders are more forthcoming, even in the US network world in some cases. "The biggest change is we are now all in the series development business, not the pilot development business," says Endemol Shine Studios president Sharon Hall. "It has changed the calendar of our work seasons. Often, the writer's room has completed eight to ten, or more, scripts before we even go into production. I often find myself 'missing' pilots – even though they were not cost-effective nor indicative of what the series will look or feel like – they gave you an opportunity to course-correct. In the direct-to-series world, the scripts and time to prep properly are paramount."

The global rise of SVOD has also allowed creators to play with formats and run-times. Without the need to break for commercials, or for an episode to last an exact time, the creative team has a newfound freedom. That is also a challenge for a distributor when it comes to selling a show to a traditional buyer.

"Studios no longer simply produce a traditional 42-minute, self-contained episodic series," says Entertainment One's executive VP, global production, Carrie Stein. "With the on-demand world, producers now need to blend the traditional with the untraditional to produce a hit."

The length of project is increasingly flexible, and while long-running weekly series will always be in demand, broadcasters are also going for highly marketable, shorter, event series, which vary in episode number.

Even assuming a channel does have a great drama series, the concern is it gets lost amid the hundreds of other options in scripted TV. *Breaking Bad* was a famously slow burner until Netflix allowed viewers to binge



"We are aware of the changes in the demands of viewers... nevertheless, we need to realise the majority of our target audience in Germany still wants to watch procedural shows"  
**Jörg Graf, RTL**

development," says Ampere Analysis research director Guy Bisson. "It really is easier to carry across more complex characters and stories when you can watch back-to-back in a more movie-like viewing experience, and also 'catch-up' for a proper recap."

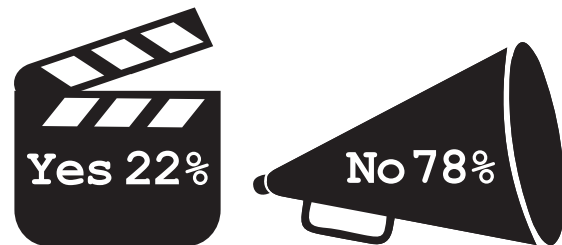
Germany-based TV writer, and member of the Dirty Dozen collective, Korbinian Hamberger, agrees there is room for more complex stories to be told. "Creators don't have to worry whether a viewer might miss one episode or not – because they won't," he says. "The result is more complex character development, highly serialised storylines and the freedom of having a bigger variety of episodes."

Bingeing series means a glut of serialised projects in the market designed to draw a viewer into marathon watching sessions. Conversely, the big free TV stations in France, Germany and elsewhere have been crying out for more procedurals, and the feeling among the execs we spoke with was that the industry has started listening, with 63% of respondents suggesting this kind of sit-back popcorn TV is making a comeback.

"We are aware of the changes in the demands of the viewers in general such as binge watching, nevertheless, we need to realise that the majority of our target audience in Germany still wants to watch more classical procedural shows," says RTL's chief buyer, Jörg Graf. "There hasn't been a big change in terms of which stories we can tell, but once we see a high potential in a show we have to ensure that our audience has access to the show apart from a linear transmission. Non-linear distribution has definitely become a must-have."

Whether scripted or procedural, what all of the above does mean is that talent is kept busy, and by extension is in short supply. Timelines also, paradoxically, get both lengthened and compressed.

Are the US studios as influential as ever?



the series on SVOD, in turn building a fan base on linear TV. However, the landscape has got more cluttered, and marketing becomes a key challenge in that environment. "Social media has transformed how shows are marketed and how viewers expect to consume all media," says Craig Cegielski, co-CEO, FremantleMedia North America. "Engagement with audiences is key – enabling viewers to be brand champions can help a series break through, and if nurtured correctly, those champions can drive enough passion and awareness to create the next mega hit." **TBI**



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