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EDITOR'S NOTE

KALTRINA BYLYKBASHI



The international television industry is going through great times of change, a recurring theme you may find throughout our first summer issue.

As we head to events all across Europe, from Hungary to France and Spain, the defining conversation seems to be evolution in an increasingly complex, but collaborative, market.

So, we've caught up with NATPE organisers to discuss what to expect at the newly rebranded NATPE Budapest International event this June, which now glances at influences from the MENA and EMEA regions as well as its traditional CEE focus.

In addition, HBO Europe execs talk to us about bringing Croatia's first high-quality drama original to its audiences. A move that looks to compete with the rise of foreign language titles taking international TV by storm.

While disruption is certainly a hot topic of the moment, viewers are responding to the chaos by seeking familiarity and comfort, as we find out in a report from the LA Screenings and a note from Banijay's Carlotta Rossi Spencer. As we head into the summer, studios have picked up nostalgic titles, while Spencer argues that formats with heart are always best.

June is also a time when the best factual content is showcased in the French port town of La Rochelle for Sunny Side of the Doc. Our Hot Picks feature highlights some of the best projects in this space, with varying themes from Royal Weddings to reformative convents.

As the industry manoeuvres these shifts, we'll be there, from Conecta Fiction in Spain, to the TV festival in Edinburgh, to share the best international conversations. Look forward to seeing you there.

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HBO chases Adria success

As HBO Europe begins work on its first Adria original, *Success*, TBI catches up with execs Steve Matthews and Antony Root on its plans for the region and feedback on how it's evolving.

Like many firsts currently coming out of the Balkan region, HBO is looking to create the territory's first high-end drama to match the boom in locally produced titles developing all around the world today.

Success has just passed the half-way mark in production and is due to be broadcast by the end of the year. Hailing from Macedonian

writer Marjan Alčevski, it's a poem to Croatian capital Zagreb, dissecting the layers of a modern urban society and exploring themes of frustration, alienation and the longing to be released from the traps of everyday life.

"Why shouldn't the next big show come out of Croatia rather than Denmark," says Matthews, executive producer at HBO Europe. "It feels like all bets are off at the moment, it's a

very exciting time in the market."

With audiences that now have more appetite for niche titles and a deeper interest in non-English language, subtitled, television, Matthews believes that avid viewers of BBC 4 or Walter Presents will have an opportunity to "try flavours they may not have tasted before" from the region.

It has, however, been a long process for the



seen with *Mission Impossible* going to Prague in 1996, and I recently also worked on *The Borgias*, which was set up in Hungary.

“I remember thinking then, this is fantastic for everybody apart from local writers! It’s very nice to have a job to now change that. A lot of our energy is going into it,” says Matthews.

Much like HBO did with Hungary in the CEE territory, the company plans to build from the bottom. This is the first title from its writing competition First Draft, which sought to find talent in the region. The contest first took place at the Sarajevo Film Festival in 2016. Another title, *Ottok*, is also currently in development.

“It’s the way we’ve worked in all the territories really, we don’t have a list of the type of project we’re looking for.

“You’re looking for a balance between what I can bring, 30 years of experience of structure and dramaturgical knowledge, and combining that with the raw local talent and trying to find a way that you can shape it into something that’s a really good coherent story, without losing and squashing the local nuance, cultural perspective and flavour that they have.”

In Hungary, HBO brought in writers for development and now sees them writing their own shows and creating quality drama such as *Golden Life* – loosely based on Finnish series *Helppo elämä*.

“But it’s kind of unpredictable. Our Romanian gangster show is big in Spain apparently, so we never know how these things

Antony Root, executive vice president of original planning and production in Europe, says that along with HBO’s other services in the Nordics and Spain, the network looks to create a show a year in each territory, which now includes the 17 countries of Denmark, Norway and Sweden in the Nordics; Spain; and Hungary, Poland, Czech Republic, Slovakia, Romania, Bulgaria, Croatia, Slovenia, Serbia, Montenegro, Bosnia and Herzegovina, Macedonia and Moldova in the CEE region.

“We’re going to have a lot of shows, maybe eight titles next year, released to the public. All local language, local writers, local directors on the HBO services, whether OTT or linear channel,” he explains.

While the exec admits that some local productions will rarely reach the success of HBO shows such as *Game of Thrones* and *Westworld* have, there has been cases where they perform well in territories other than their own.

“We know that just from looking at our ratings figures or performance figures that a show, for instance, produced in Czech Republic can do very well in Poland. *Umbre (Shadows)* in Romania in particular has travelled across our other territories successfully,” he says.

However, he’s keen to add: “In countries of origin we expect local titles to do extraordinarily well. In some instances last autumn, our local shows outperformed *Game of Thrones* on the linear and on the HBO Go service.”



“It’s fantastic for everybody apart from local writers! It’s nice to have a job to now change that”
Steve Matthews

company. While HBO has been developing talent in the area for some years, particularly when it comes to formats, high-end drama hasn’t been done before in the region.

Part of the reason has been the lack of investment in writers in the area.

“You have to remember all of these countries are highly mature when it comes to production. When it comes to crews it’s fantastic, as we’ve

are going to pay off.”

Matthews is unsure how to describe the tone and value of Croatian and Balkan storytelling, but he says nonetheless the focus is helping others tell their stories.

“The next step at the moment is to capitalise what we have, which is to bring some more writers into the fold and create the stable for talent we have in other territories.”

The countries of former Yugoslavia are an important and growing market for HBO because of its subscription rates and also the range of countries and languages within which it can produce shows, according to Root.

“It’s a region of notorious complexity and that’s always good for drama. We hope that whatever we make down there will resonate in our other countries,” he concludes. **TBI**



CEE demand snapshot



13 Reasons Why

Exclusive data from TBI and Parrot Analytics gives a one-week snapshot of six CEE countries and the programmes they have been demanding. Kaltrina Bylykbashi reports.

Like in the rest of the world, *13 Reasons Why* has taken CEE countries by storm, highlighting the region's need for angsty teen drama. While the show has received criticism for its portrayal of suicide and problematic topics such as bullying and rape, recent Nielsen data has shown that its second series reached 2.6 million viewers worldwide in the first three days of its release. That's twice the audience size of *The Crown's* season two debut in December.

Parrot's data, which assesses demand through 'expressions' across various platforms such as social media, shows that this has also been the case across Poland, Ukraine, Czech Republic, Croatia, Romania and Hungary.

The mystery teen drama, in which the audience explores why schoolgirl Hannah Baker ended her life, was most likely to be found in top ten lists across the six territories. It was placed in the states' top ten lists for digital series and overall series lists 11 times, the most out of all top titles. Furthermore, it took the top spot in all of the top digital series lists apart from Ukraine, where it was the fifth most demanded show.

Black Mirror, *The Handmaid's Tale*, *The Grand Tour*, *Narcos*, *The Walking Dead*, *Vikings* and *Westworld*, were all the next most likely to appear on the CEE demand lists.

Highly demanded digital series

While *13 Reasons Why* dominated the top lists across the board, it far surpassed other titles in demand expressions in Poland and Romania.

In Poland, the title received near 1.7 million more demand expressions than the second title on the list, *Stranger Things*. It received 2.2 more demand expressions than the tenth and final title, *Star Trek: Discovery*.

Meanwhile, in Romania the show received 1.4 million more demand expressions than the lists second title *Narcos*. It received 2 million demand expressions where the tenth title, *House of Cards*, received 346,602.

This is a much bigger gap than in the other countries. In Croatia, for example, *13 Reasons Why* received a mere 200,000 more demand expressions than its second most popular title *The Handmaid's Tale*.

Ukraine's top ten titles were all Netflix shows and all but one are older, long-running, titles. The streamer's first Danish production *The Rain*, launched on May 4, made an impact on the nation as the eighth most in-demand digital title. It generated 51,000 more demand expressions than *Ozark*, which was placed tenth on the list.

Black Mirror topped Ukraine's list, the only nation without *13 Reasons Why* in the top spot. The Charlie Brooker series reached 1.3 million demand expressions, closely followed by *Narcos* with 1.2 million demand expressions and *Altered Carbon* with 1.1 demand expressions.

The remaining series on the list show a wide drop in demand



TOP 10 OVERALL SHOWS: UKRAINE

1	<i>Vikings</i>	4,166,703
2	<i>Shameless</i>	3,707,747
3	<i>The Walking Dead</i>	3,576,175
4	<i>Supernatural</i>	3,048,279
5	<i>The 100</i>	2,525,111
6	<i>Riverdale</i>	2,425,537
7	<i>Westworld</i>	2,387,082
8	<i>PAW Patrol</i>	2,356,193
9	<i>The Expanse</i>	2,334,360
10	<i>Game Of Thrones</i>	2,263,312

TOP 10 DIGITAL ORIGINALS: POLAND

1	<i>13 Reasons Why</i>	Netflix	2,850,955
2	<i>Stranger Things</i>	Netflix	1,175,736
3	<i>Narcos</i>	Netflix	1,141,938
4	<i>Black Mirror</i>	Netflix	1,106,572
5	<i>The Grand Tour</i>	Amazon Video	1,036,877
6	<i>The Crown</i>	Netflix	869,769
7	<i>Altered Carbon</i>	Netflix	819,401
8	<i>House Of Cards</i>	Netflix	805,047
9	<i>The Handmaid's Tale</i>	Hulu	754,798
10	<i>Star Trek: Discovery</i>	CBS All Access	691,573



compared to the top titles, with *Lost In Space* and *13 Reasons Why* hitting the 800,000 range in fourth and fifth place, respectively. *Mindhunter*, *BoJack Horseman* and *The Crown* all received demand expressions in the 700,000 range, along with *Ozark* and *13 Reasons Why*.

Digital originals on Hungary's top ten list include titles from Hulu, CBS All Access and Amazon Video, alongside Netflix favourites. *Black Mirror* also makes an impact in Hungary, coming in second place, and was followed by Hulu's *The Handmaid's Tale* and CBS All Access' *Star Trek: Discovery*.

Stranger Things, which appears in fifth place on the list, was not as likely to appear in the top tens in the other countries despite its mammoth 16 million viewership for its second series debut, as revealed by Nielsen.

Amazon's *The Grand Tour* continues to perform well, it was one of the most demanded shows across Europe in 2017 according to Parrot data, and it's the sixth most demanded title on Hungary's list.

Remaining titles in Hungary's digital top ten include the ever-popular *Narcos*, which is gearing up for its fourth season, *Gilmore Girls: A Year in Life*, *Altered Carbon* and *House of Cards*.

In Poland *Stranger Things* arrived in second place with 1.1 million demand expressions, *Narcos* came third with comparable figures, and *Black Mirror* came in fourth.

Remaining titles on Poland's top ten then show *The Grand Tour*

gaining near 1 million expressions, *The Crown* receiving over 860,000 and *Altered Carbon* and *House of Cards* receiving similar figures with around 819,000 and 805,000 expressions respectively.

The Czech Republic is the only CEE country with *Sense8* in its digital list, coming in tenth in the top ten. The show is reaching its season finale launching this month, despite protest from fans. The title often appears in Parrot's top lists across a range of territories.

Dominating the digital top ten list for the Czech Republic are non-Netflix titles *Star Trek: Discovery*, in second place, *The Grand Tour*, in third, and *The Handmaid's Tale*, in fourth.

CBS All Access title *The Good Fight*, meanwhile, only appears in Romania's top ten digitals list, in ninth place.

Highly demanded digital series in Croatia are similar to other CEE countries. *13 Reasons Why* leads, with *The Handmaid's Tale* taking second place and *Star Trek: Discovery* taking third.

Despite a long hiatus that saw *House of Cards* star Kevin Spacey fired from the leading role after claims of sexual harassment, the show appeared in four of the six top digital lists across the region.

The political thriller is now set to return this autumn, three months later than its original premiere date, which was set for spring. *House of Cards* will not have Spacey back on board and likely feature Robin Wright's character Claire as the lead, although the changes don't seem to be putting audiences off at the moment.

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Overall favourites in CEE

The overall lists combine digital and broadcast titles that create demand. Across these lists *13 Reasons Why* still appeared in five of the six countries' top ten.

The title stands out in Croatia in particular where it tops both the digital series and overall series lists. It gained near 360,000 demand expressions, 200,000 more than the tenth title in its overall list, *The Big Bang Theory*.

In Romania and the Czech Republic, *13 Reasons Why* takes second place in the overalls lists. The title nearly draws with the top series *The Walking Dead* which received 2.4 million demand expressions, compared to the teen drama's 2 million.

In the Czech Republic, however, *The Walking Dead* gained twice as many demand expressions as *13 Reasons* receiving near 1.3 million expressions compared to 799,000.

There were more dominant titles in the overall lists however, with *The Walking Dead*, *Vikings*, *Westworld* and *The Expanse* all showing widespread demand from CEE audiences.

In Poland, *Vikings* is the most demanded show overall with 4.5 million demand expressions, 1.7 million more than *13 Reasons Why*.

Other notable titles to appear on the country's list include *Westworld*, which jumped to fifth place after the return of a highly anticipated season in April, and *The Expanse*, which generated 1.9 million demand expressions on the back of the news that Amazon Video would pick up season four after a Syfy cancellation in May.

Vikings also topped Ukraine's overall list, gaining 4.1 million demand expressions. This was followed by *Shameless*, which appeared solely on this list out of the six with 3.7 million demand expressions.

Other commonly popular titles across the lists include CW's *The 100*, *Riverdale* and *Game of Thrones*.

The Walking Dead topped the overall lists for Hungary, Romania and Czech Republic. The title far surpassed others in Hungary, receiving nearly 1.5 million demand expressions compared to 740,000 for *Vikings*, which appeared second on its list.

Unexpected titles on the top list include *Paw Patrol* for Ukraine, *America's Funniest Home Videos* for the Czech Republic and Croatia, and *Spongebob Squarepants* for Hungary.

Drama reigns supreme

A genre breakdown of each territory shows that the various nations have a dominant preference for drama. The genre took near 50% of the demand expressions across the board.

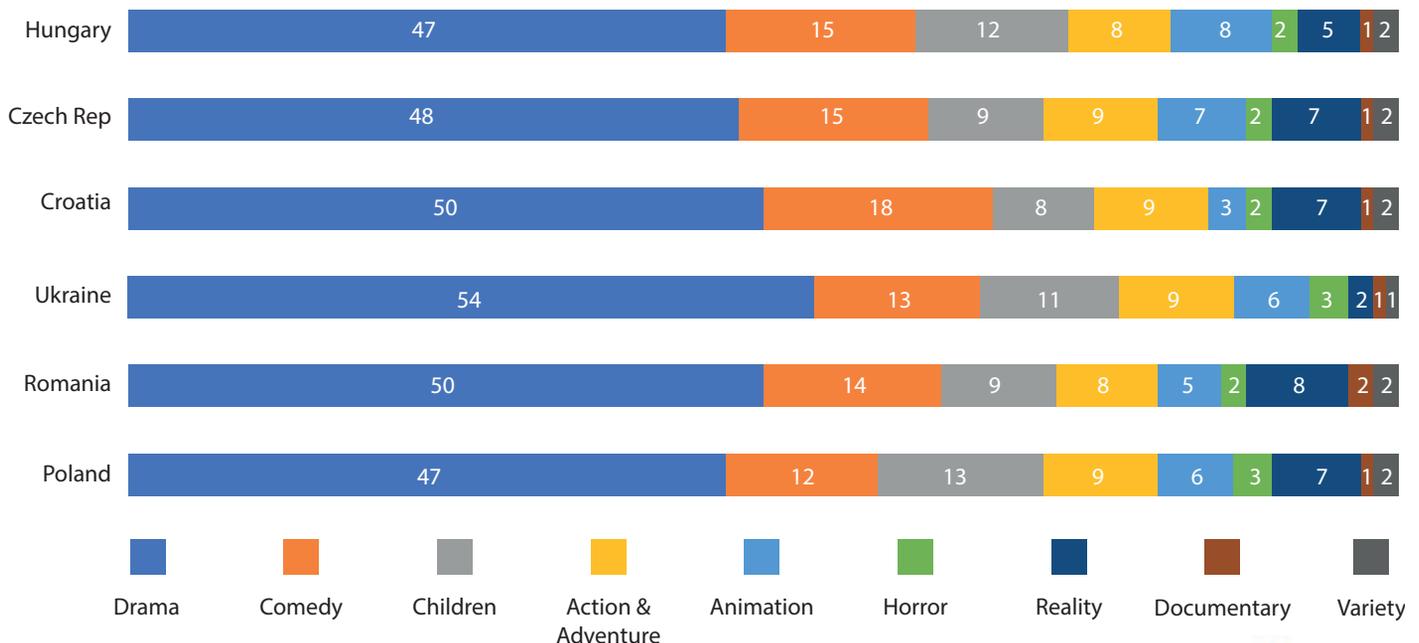
Ukraine showed the highest demand for the genre, where drama took 55% of the share, and Hungary, the Czech Republic and Poland showed the least, with 47% of the share.

Comedy was next most in-demand, with each territory showing between 13-18% of a preference for the genre. This was followed closely by children's content where the nations showed a preference for the genre of between 7-13%.

Action and Adventure, animation, horror, reality and documentary genres all took 10% or less of the demand share in each territory.

The charts show the meteoric rise for drama over the past few years. When TBI did a similar review in 2016, action and adventure was the most in-demand genre across the board, closely followed by horror and drama. **TBI**

Share of demand (%) by genre for Eastern European countries (1st March - 31st May 2018)



Source: Parrot Analytics - Demand Expressions®: Total audience demand being expressed for a title, within a market. Analysis excludes factual and sports titles

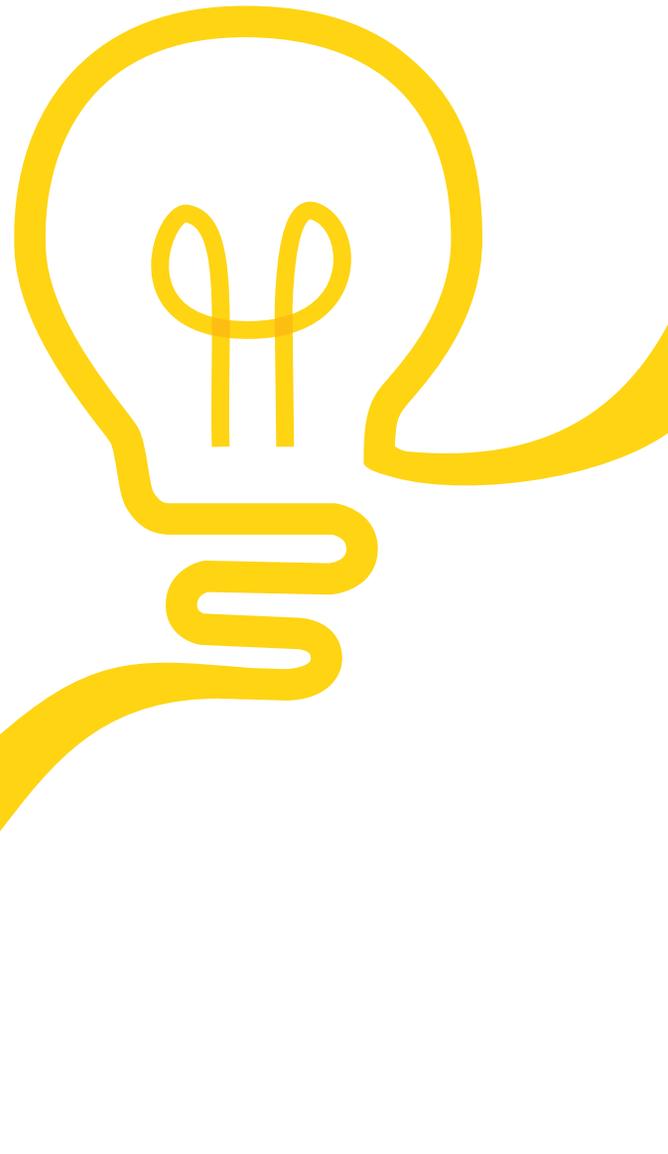




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The mass success of *Roseanne* at the start of this year, despite its ultimate cancellation, has shown studios that audiences currently want familiar, warm-hearted and laid-back television and it seems that the top US players have followed suit during this year's Upfronts. Kaltrina Bylykbashi reports.



Up nostalgia street



Magnum P.I.

Roseanne had a two-part premiere in March and drew 18.2 million viewers on its opening night, a smash hit on all accounts and one that studios looked to recreate through a range of 2018/19 programming, despite the show's unpredictable cancellation a few weeks after the Upfronts.

While certainly playing to their strengths and branding, it seems that the top move for each studio involved a show that is either familiar or familiar in some way, possibly a response to an uncertain political climate facing viewers and execs alike.

Perhaps the edgiest of the lot was NBC, which had the highest number of titles picked up with varied and original ideas. From clairvoyance crime drama *The Inbetween* to treason spy thriller *The Enemy Within*, the titles show a mixture of genres and approaches.

Initial pickups *Abby's* and *I Feel Bad* are both female-led multi-camera comedies also directed by female TV creatives Pamela Fryman and Julie Anne Robinson. *Abby's* is starred by Natalie Morales as a bar owner with a strict code of conduct that includes no phones and earning a seat at the table. The series is from Universal Television, Fremulon and 3 Arts.

Universal TV's *I Feel Bad* is executive-produced by Amy Poehler and Aseem Batra, and starred by Saraya Blue as a mother who faces a range of moral dilemmas, while attempting to be the perfect mum, boss, wife and friend.

The title with the most heart seems to be *The Village*, which follows the lives of residents in a Brooklyn apartment and their relationships. This is counteracted by edgier titles such as *Manifest*, which sees plane-crash survivors return after being reported missing for five years.

Despite NBC's moves, its biggest play still remained its last minute pick-up of *Brooklyn Nine-Nine* after Fox cancelled it a few days earlier. The move stands out, not only because it was clear that there was demand for the show after an uproar from fans post-cancellation, but also because NBC forwent picking up a newer comedy for a title that is tried and true.

Belinda Menendez, president and chief revenue officer for global distribution at NBCUniversal, tells TBI: "We believe that with the slate of titles we have this year, we should be able to place them on the largest platforms around the world and our goal is to get these series into the top ten performing shows internationally."

This goal will also be supplemented by NBC's international rights to a *Mangum P.I.* reboot by CBS, another move towards the familiar. "This



Abby's



The Kids Are Alright



The Enemy Within



Whiskey Cavalier

is a 'blue sky' procedural show that we think will be a huge hit around the world," says Menendez.

Despite this, she says: "The volume of content is actually similar to last year's and our direction remains the same: to make the best possible series that will resonate with buyers around the world – we think this year will be very successful."

Disney's ABC Network, responsible for the *Roseanne* comeback, has also focused on well-known stars and family favourites.

Disney has renewed popular titles such as the *Goldbergs* and picked

up titles such as *The Rookie*, featuring fan-favourite Nathan Fillion, *Take Two*, starring *The OC*'s Rachel Bilson and *Whiskey Cavalier* featuring *Scandal*'s Scott Foley.

In keeping with the brand, family comedy was key for the network which has also brought in single-camera title *The Kids Are Alright*, focusing on 70s Irish-Catholic family the Clearys, and along with Sony Pictures Television (SPT) worked on *Goldberg*'s spin-off *Schooled*.

SPT has international rights for the title. Keith Le Goy, president of worldwide distribution at Sony described such titles as "warm bath TV".

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“In some ways it’s a response to the whole anti-hero trend which has obviously been very strong for the past ten years,” says Le Goy. “You snuggle up and it’s really uplifting and it’s not explosions and everything, but you really feel empathy for this character and you just want the best for them.”

Le Goy also says a need for nostalgia in the current worldwide political climate points to some of the studios decisions.

“One of the things that we’re living through at the moment is, whether it’s Trump or Brexit or North Korea, there’s a lot of uncertainty. There’s a lot of fear right now and when you’re feeling that there’s always this nostalgia for what seemed like an easier and more communal time and a more harmonious time,” he adds.

Bucking the trend for ABC are Eva Longoria- (*Desperate Housewives*) produced *Grand Hotel*, which focuses on a wealthy Hispanic family in Miami and the corruption surrounding their hotel, and *A Million Little Things*, a friendship drama focusing on the meaning of life.

While reboots have been a strong trend in the last couple of years with the comeback of *Will & Grace*, *MacGyver* and *Dynasty* all making an appearance, the trend was also firmly highlighted in this year’s Upfronts. CBS has likely made the boldest move in this field, bringing back *Magnum P.I.* and legendary anchorwoman *Murphy Brown*.

The two series are certainly a focus for the network with much buzz



around the Jay Hernandez-starring *Magnum*, which will appear on its schedule on Monday evenings, and Candice Bergen-starring *Murphy Brown*, which will air on a primetime slot on Thursdays.

Keeping with the theme CBS has also picked up family comedies *The Neighborhood*, Nina Dobrev-starring *FAM* and Damon Wayans Jr. project *Happy Together*, which focuses on a married couple facing the realities of ageing.

Focusing on an edgier supernatural theme, The CW also bet on comebacks with a reboot of *Charmed* and a *Roswell High* spin-off, *Roswell: New Mexico*. The network also brought back *Vampire Diaries* writer Julie Pec with a new title that will stay within the same universe, *Legacies*.

In fairness, CW is known for its revivals from *Riverdale*, based on characters from Archie Comics, to *Supergirl*. Other titles coming from the studio are *In the Dark*, which follows a blind woman who sets to solve a murder case, and *All American*, a Warner Bros. TV, CBS TV Studios and Berlanti Productions title about a rising high school football player.

Fox, known for its risqué titles from *Family Guy* to *Empire*, has also taken a mellow approach, possibly related to the company beginning to split its assets with Disney and shape the ‘New Fox’ brand. It’s most poignant play saw it take Tim Allen’s *Last Man Standing* from ABC, something it highlighted as a triumph during its Upfront presentation.

Its multi-camera comedy pickup *The Cool Kids* also focuses on intergenerational issues as a group of pensioners get up to no good in their older age. The show’s stars, in addition to *Last Man Standing*’s Tim Allen, are from an older age bracket, perhaps suggesting a new direction for Fox in the future.

“In this day and age we definitely see the audience gravitating toward more comfort-food type programming or ones where the good guy wins, or there’s an uplifting storyline,” says Gina Brogi, president of global distribution at 20th Century Fox TV Distribution.

“I think there’s also part of the marketplace moving more towards nostalgia and themes, characters and stories that are familiar to them,” she adds.

While Brogi maintains that “breaking rules” is part of Fox’s DNA, she emphasised its “diverse, broad” slate over any risqué favourites. **TBI**

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Trends Watch:

Ahead of this year's event, TBI speaks to NATPE president and CEO JP Bommel on what to expect from the newly branded and outward-looking NATPE Budapest International

TBI: This is your third year as NATPE president. What do you set out to do differently from previous years?

This year our June event is entitled NATPE Budapest International. This reflects the expanded nature of the market. While the focus remains on Central and Eastern Europe, we are broadening our outreach to encompass the EMEA and MENA regions and we are already seeing interest from companies from these areas.

How does NATPE Budapest now stand out from other international markets?

For over 55 years NATPE has created events that have enabled all parts of the content industry to come together.

While the industry itself is changing, the core of our work is not. Meeting our clients face-to-face, learning about their challenges and opportunities, and talking to them about content continues to be an important part of our industry.

We are still operating in a world where relationships are vital and a focused and boutique event such as NATPE Budapest International gives everyone extra time to spend together and understand each other's needs better.

The more we talk and understand about the changes in creating and selling programmes, the less frightening the escalating evolution of our business will be for us all.

Will the studios be screening new content at NATPE Budapest that they launched at the LA Screenings in May?

As in previous years we have been working with the studios to help them have a clear period of time to organise their screenings and showcase hot new shows in Budapest straight from the 2018 LA Screenings.

We already have screenings confirmed with Warner Bros, CBS, NBC, with others set to join.

We make a real effort to allocate these at set times throughout the event to enable buyers and acquisitions executives the opportunity to visit the market floor to meet all the companies at the market.

What can buyers look forward to at this year's market in Budapest?

While the marketplace remains the centrepiece of NATPE Budapest



International we have carefully crafted a limited number of very relevant sessions that will inform and drive discussions during the market and help identify business opportunities in CEE, EMEA and MENA.

We are curating an international insight session to give buyers and sellers an up-to-date overview of programming trends. Other panel discussions will look at the current status of international drama production and co-production as well as distribution strategies for unscripted formats.

We are also hosting a number of lunchtime and evening networking events, as well as concluding with the extremely popular third annual Pitch & Play Live! which will again showcase brand new and innovative formats from the CEE region with international potential.

Are there any trends in programming for CEE for the year?

Viewers around the world are calling for more and more content to keep pace with their ever-increasing opportunities to screen at anytime, anywhere.

With the growth in SVOD, AVOD and OTT niche and local platforms, the demand for content continues to build and we are seeing a definite upturn in the development of locally produced content from Central and Eastern Europe – across all genres.

NATPE Budapest

Red Arrow's Bo Stehmeier, SVP of global sales at its international arm, discusses the hottest trends in CEE and what buyers want

What is your main focus at NATPE Europe?

With the formats business in CEE continuing to grow, we will be focusing on our scripted remakes, such as *Lice Mother* – the hit Netherlands comedy, alongside factual reality content and social experiments such as *Old People's Home for 4 Year Olds* – winner of two International Format Awards this year. We'll also be aiming to place Red Arrow Studios International's growing factual and documentary catalogue with local broadcasters and platforms, including a range of theatrical feature docs and new primetime event documentary *Man's First Friend*.

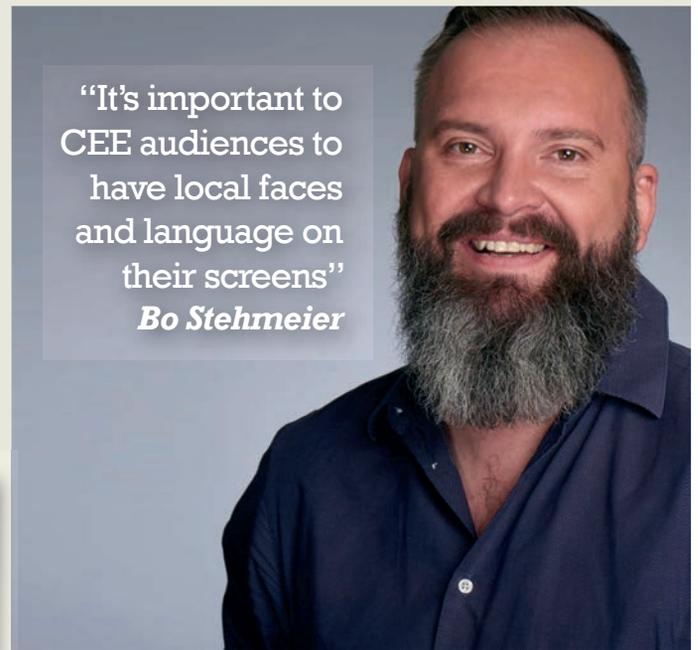


Who are your main clients?

Our main clients are broadcasters, as well as production companies. VOD platforms also offer exciting new business possibilities and have opened up a wealth of new commercial opportunities. CEE is a very diverse market and we are in a fortunate position to have such a broad catalogue, enabling us to work with many different players in the region.

What kind of programming does best in CEE?

Scripted remakes perform very well, alongside social experiment series with emotional and topical themes, such as our hit *Married at First Sight*. Primetime entertainment shows that are ripe for product placement and sponsorship opportunities are also growing, while German TV movies and factual content remains popular, such as our evergreen science-tainment series, *Galileo*, which is a huge brand in many CEE markets.

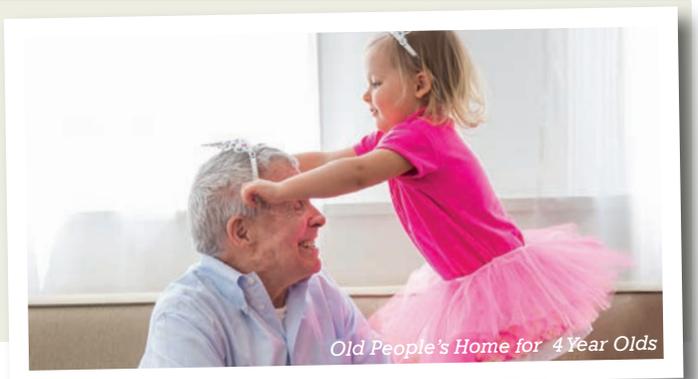


What trends are you seeing in the region?

As there is room to be creative and experimental in CEE, scripted remakes are booming in the region. Localised content really works best in the market and is easy to produce. Sponsorship-friendly access primetime shows also continue to thrive.

How important is original programming to a CEE audience?

It’s very important to CEE audiences that they have local faces and language on their screens, along with humour and themes tailored to them. While humour can be hard to translate across markets, we’ve had great success in CEE with crime dramedy *The Last Cop*, along with *Match* and *Lice Mother*. We have many other local remakes currently in development. **TBI**



Factual Hot Picks



THE SHOW: *To The Ends of the Earth*
PRODUCER: Sundog Pictures
BROADCASTER: TBC
DISTRIBUTOR: DCD Rights
THE CONCEPT: The doc looks at the triple threat of population growth, climate change and over-consumption and how to tackle them

Looking at topical issues from China to California, DCD's wide-ranging title explores how to tackle worldwide problems and connect nations to resolve these issues.

"No film has attempted to join the dots between population growth, climate change and over-consumption. This triple threat sits behind many of our current news stories – from armed conflict to the degradation of resources," says Johnny Webb, co-founder and CEO at Sundog Pictures.

The doc covers contemporary stories including Day Zero in Cape Town, the first world city to face the prospect of running out of water, as well as female

empowerment and education, which chimes with the current debates about the contribution and value of women in society.

Ends of the Earth features a global cast of contributors, including women from Turkana, Kenya, who defy their husbands wishes for large families by taking control of their family planning. We also hear about the hopes and dreams of an aspiring Chinese family and the financial pressures of having a second child.

"But more than this, the film is about the interconnectedness of the world, how trade links us all, with sometimes surprising connections in the production of diverse

goods from meat to mobile phones," says Webb.

The title, which uses original footage filmed across four continents, was created by director James Branazon, who witnessed the impact of population growth and climate change for himself and saw the struggle of Sub-Saharan countries trying to educate their growing populations first-hand.

"The final chapter is one of hope – looking at how we adapt our behaviour in a crisis and especially at the importance of educating girls. It leaves the viewer feeling empowered and inspired," concludes Webb.



THE SHOW: *Ray Winstone's World: Sicily*
PRODUCER: SWR Media, Dash Pictures
BROADCASTER: TBC
DISTRIBUTOR: Banijay Rights
CONCEPT: Sicily has had a profound impact on *Sexy Beast* actor Ray Winstone and he sets out to find out why

THE SHOW: *Royal Wives of Windsor*
PRODUCER: Spun Gold TV
BROADCASTER: ITV1
DISTRIBUTOR: All3Media International
CONCEPT: A series looking at the women that have married into the House of Windsor



Banijay's latest doc sees well-known actor Winstone bring his passion for Sicily to audiences as he explores the island of his second home.

"Ray brings a passion and authenticity to the project – knowing the island like the back of his hand as he has a second home there - as well as a very original hosting style," says Andreas Lemos, VP of sales and acquisitions, North America, Banijay Rights.

With local characters and newfound friends as his guides, Winstone makes a range of discoveries through Sicilian homes, kitchens, churches, temples and vineyards.

He also brings his trusted friends, restaurateur Bruno Zoccola and sports broadcaster Matthew Lorenzo, along for the ride.

The idea for the title came from Winstone himself, after he spent year visiting with his family and friends. It has the perfect elements to make a successful and fun

programme, according to Lemos.

"The 'Netflix effect' is seeing all our clients – across SVOD and linear – increasingly request elevated factual content that can sit alongside their star-driven scripted commissions," says Lemos.

"This show fits that bill by providing A-list talent, gorgeous 4K photography, and an entertaining, filmic flow."

Winstone has starred in a range of popular movies and TV shows including *Gladiator*, *Sexy Beast*, *Great Expectations* and *Sweeney Todd*. It makes for perfect international appeal for the title, according to Lemos.

"We see the show as a genre hybrid as well, with equal appeal to the global linear and VOD platforms, free-to-air and cable channels with a varied slate, as well as specific food, lifestyle, history, travel and even comedy specialist broadcasters," he adds.

As the buzz settles from May's Royal Wedding, TV execs are asking themselves how they can preserve an audience that followed Prince Harry, and former *Suits* star Meghan Markle, from engagement to ceremony. With 8.7 million viewers tuning into the wedding on the BBC alone, there is certainly a crowd to please.

With this in mind, *Royal Wives* attempts to capture the mood with a documentary that spans generations of the family and how it has evolved.

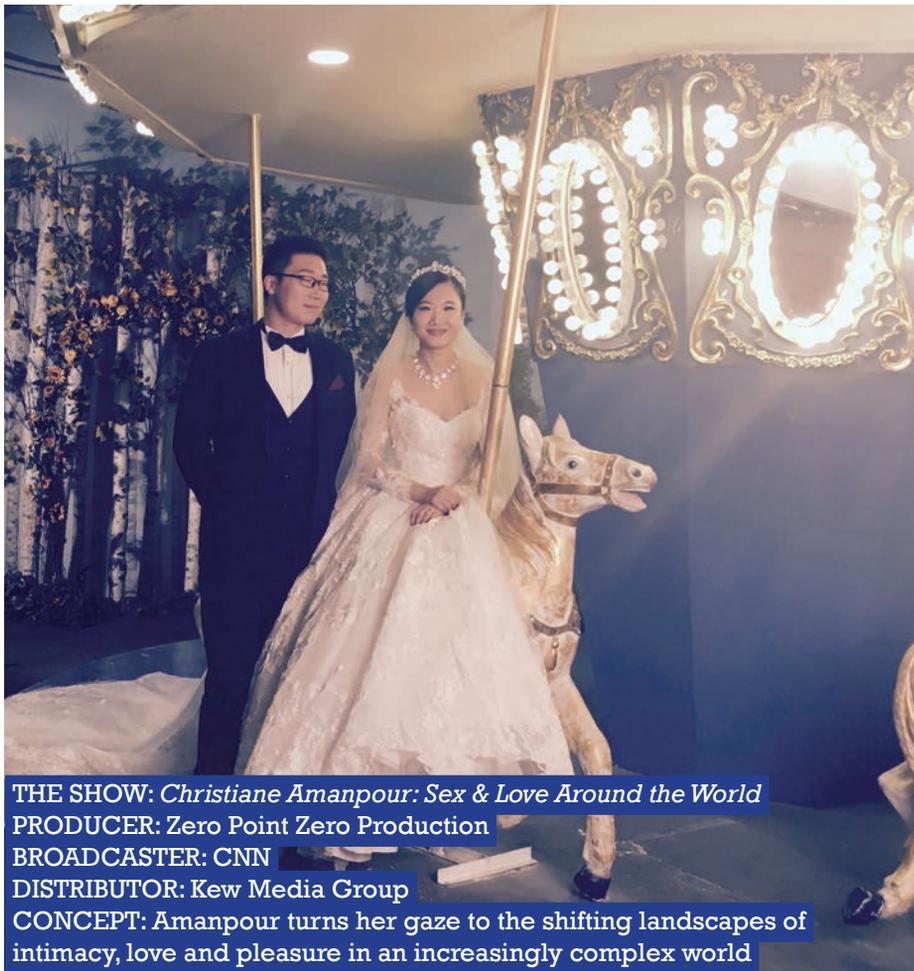
"This two-parter is different and unique in its angle as it is not about a specific time, or couple, but the progress the Royal Family has made as a result of marriages," says Ben Packwood, sales manager at All3Media International.

"It is about the rejuvenation and reinvention of the British Monarchy from the perspective of the women that have married in. From George V ending the tradition of marrying European royalty by wedding Elizabeth Bowes Lyon [the late Queen Mother], through to the acceptance of a commoner [Katherine Middleton] and now even a foreigner."

Told through archive footage, stills and music from the early 20th Century right through to now, the doc also looks forward and dissects the lessons Markle can learn from history.

"We are given expert insight into what Meghan can expect from life as a royal wife, from bonding with the in-laws, to dealing with 'fixated individuals,'" says Packwood.

Interviewees include Jeremy Paxman, David Starkey, and Gyles Brandreth.



THE SHOW: *Christiane Amanpour: Sex & Love Around the World*
PRODUCER: Zero Point Zero Production
BROADCASTER: CNN
DISTRIBUTOR: Kew Media Group
CONCEPT: Amanpour turns her gaze to the shifting landscapes of intimacy, love and pleasure in an increasingly complex world

Christiane Amanpour has built an illustrious career interviewing global power players and reporting from war-torn countries, and here she looks to get a global perspective of our closest relationships.

"*Sex & Love Around the World* discusses taboo topics in a very accessible, entertaining and enlightening way," says Lizzie Fox, VP of CNN original series.

"The narratives focus on the female perspective of relationships, marriage, sex and dating."

Amanpour has covered ground reporting on a range of war-torn and conflict-ravaged countries, but never delved into their intimate practices or cultures. It led the renowned journalist to explore these countries with a new angle.

With the #MeToo conversation more prevalent than ever, and the value of the female perspective growing in strength, the doc looks to gain an international understanding of what relationships mean to people around the world.

Episodes were filmed in Delhi, Tokyo, Beirut, Accra, Shanghai and Berlin, to gain a balanced perspective of the female role in society.

"The series is about empowering women to tell their intimate stories in a creative and thoughtful way," adds Fox.

THE SHOW: *For the Love of Spock*
PRODUCER: 455 Films, For the Love of Spock Productions
BROADCASTER: N/A
DISTRIBUTOR: Red Arrow Studios International
CONCEPT: An affectionate feature doc about *Star Trek's* iconic character and the man who played him for nearly fifty years

For the Love of Spock features never-before-seen footage and interviews with friends, family and colleagues including William Shatner and the original *Star Trek* cast, Chris Pine, Zachary Quinto and Simon Pegg.

The new crew of the *Starship Enterprise*, the cast of *The Big Bang Theory*, filmmaker JJ Abrams and astrophysicist Neil deGrasse Tyson also make an appearance.

"*Star Trek* is a global cultural phenomenon breaking geographical and cultural boundaries," says Stehmeier.

"But, as well as a celebration of Spock's global cult resonance, the title is also a moving portrait of a son's relationship with his father."

The documentary feature will have unique archive footage from the Nimoy family archives. It is a theatrical feature now available to international broadcasters.

Gravitas Ventures distributes theatrically and to VOD platforms.



THE SHOW: *Bad Habits, Holy Orders*
PRODUCER: Crackit Productions
BROADCASTER: Channel 5
DISTRIBUTOR: Keshet International
CONCEPT: Five party girls abandon booze, boys and smartphones and move into a Catholic convent for four weeks

In a first for the Catholic Church, a convent takes on a group of raucous girls in a bid to show them a spiritual path in a tech-fuelled, selfie-obsessed world.

The show arrives from a wider investigation to explore how social media is dictating the self-worth of millennials and how spirituality can combat this for the girls.

The idea emerged when Crackit discovered that more young women than ever were joining the church to become nuns as a result of modern pressures.

"Evidence revealed girls were spending their lives in a new reality, rating their success by how many likes they'd get on social media and living through their mobile phones," said Elaine Hackett, creative director at Crackit Productions.

"Research has also revealed that despite



being more body-conscious and apparently confident, this generation were in fact more insecure than any other. They are the lost generation."

The life of a nun on the other hand is one of the most basic, tech-free environments in existence. They live as a community and work to improve the lives of others while gaining self-validation through spiritual means.

Rules of convent life set a perfect template for the girls to follow in this transformative experiment. Nuns are up at 5am for prayers and they pray five times a day. They have

no mirrors, don't wear make-up and wear identical clothing.

"Their world seemed like the ideal environment to send a generation of young women who couldn't contemplate life without their phones and an online presence, who were materialistic and using boys and booze to boost their self-esteem," said Hackett.

While gaining access to a Catholic convent was a unique selling point for the format, the premise is about a spiritual journey and can be replicated anywhere in the world with multiple religions.



For the first time the Queen discusses her Coronation, which took place 65 years ago this year, in a special by Atlantic Productions and FremantleMedia International (FMI).

"What we get to see is a Queen who is highly knowledgeable, but who also has a great sense of humour and wit," says Anthony Geffen, CEO of Atlantic Productions.

The film also reveals secrets of the incredible jewels, including how they were hidden in a biscuit tin under Windsor Castle during World

THE SHOW: *The Coronation*
PRODUCER: Atlantic Productions
BROADCASTER: BBC, Smithsonian Channel and ABC Television Int'l
DISTRIBUTOR: FremantleMedia Int'l
CONCEPT: A story of the Crown Jewels with unique contribution from Her Majesty The Queen

War Two.

The Crown Jewels, which form part of the Royal Collection, consist of 140 items and contain 23,000 precious stones. These objects form the most complete collection of royal regalia in the world. The gems are inspected with 4K and Ultrascope cameras to capture the intricate details of the stones.

"This show has had huge international appeal. The Queen is a figurehead known throughout the globe and is still a very important figure throughout the 53 Commonwealth countries," adds Geffen.

FMI has so far taken the title to 70 territories including CBC in Canada, France Television in France, Telefonica in Spain and Sky in Italy.

THE SHOW: *Planet School*
PRODUCER: Maximus Film
BROADCASTER: MDR (Germany), Canal + (France)
DISTRIBUTOR: Quintus Media
CONCEPT: Planet School follows 8-17 year-olds in an ordinary day of school in extraordinary places.

The rules of the playground seem endlessly fascinating to audiences who get to relive their youthful days in school.

It is why after the success of *The Most Dangerous Way to School*, which sold to over 100 territories, Maximus Film decided to look closer at the genre.

Planet School features six different schools from six different parts of the world and explores differing people, cultures and stories in their educational systems.

"Viewers discover things they recognise and can relate to and directly compare their lives to. It's unique, exciting and will appeal to everyone," says Gerrit Kemming, MD at Quintus Media.

While the studios announced the network series for autumn at the LA Screenings, the indies had an opportunity to meet with international buyers from Lat Am and Korea, reports Andy Fry.

Lat Ambitions

At its heart, the LA Screenings (May 15-May 25) is a chance for international acquisition execs to get their first look at the new US network series set to land in the autumn. But the presence of an estimated 1,000 buyers in one location has also made it a key draw for independent studios and distributors, which arrive in town with mixed slates of scripted and unscripted content.

The rhythm of indie marketing activity is very different from that of the studios, however. MarVista CEO Fernando Szew says: “Most of the independent activity takes place at a separate three-day event ahead of the studio screenings. And in my experience, most indies don’t use the event as a launch pad for new shows. It’s more about keeping up a dialogue with clients.”

According to Szew, a lot of indies spent the duration of the Independent Screenings (May 15-17) “talking to Latin American and Hispanic US buyers, many of whom don’t travel to MIPTV in April. Alongside NATPE and MIP Cancun, the LA Screenings are now a key opportunity to talk to this group of buyers.”

For Szew, LA Screenings 2018 are an opportunity to talk about the company’s mix of TV movies and scripted series, and also a new arrangement with Hemisphere Media. Hemisphere has just acquired control of LatAm distributor Snap TV, in which MarVista has a minority stake. As part of the deal, Hemisphere has signed an agreement with MarVista to coproduce new scripted shows. The upshot of the partnership, says Szew, is that it will “deepen our ties with the Latin American region.”

As for the main Studio Screenings, says Szew, “most indies tend to stay out of the way during the day and let the buyers get on with their business. LA is our home city, so our approach is to meet up with key clients for dinner at the end of the day.”

A number of indies approached by TBI confirmed Szew’s observation, agreeing that they did not launch new products into the maelstrom of the LA Screenings. For some, this is about avoiding the tidal wave of studio competition; for others, it’s more a reflection of the fact that drama these days is being commissioned at all times of the year, which means it may not be at the right stage of development for the LA Screenings.

Gaumont Television head of worldwide distribution Vanessa Shapiro says: “Our main focus was the thriller *Nox*, which we launched at MIP, and the linear rights to all four seasons of *Narcos*, which become available in 2019. We also had season two of our French series *The Art Of Crime* and titles like *Hannibal* and *Hemlock Grove*, which continue to sell well.”

Working alongside VP, Latin American distribution and co-production Ezequiel Olzanski, Shapiro says: “We had short back to back meetings with Latin American buyers during the Indie Screenings. When the Europeans

arrived in week two for the Studio Screenings we followed up with them from MIP.”

The back to back meetings format described by Shapiro is pretty standard among indies. While the Studio Screenings are all about corralling as many buyers into a room at once, “the indie screenings are one to one meetings with buyers where we show them trailers – not complete episodes,” says Sheila Aguirre, EVP of content distribution and format sales, Latin America for FremantleMedia International. “We showed our Latin American buyers MIP launches like *My Brilliant Friend* and *The Miracle*. These are both from Italian producer Wildside, which has a good track record with LatAm buyers (*The Young Pope* did well in the region). We were also in negotiations on Australian drama *Picnic At Hanging Rock*.”

Arguably, the opportunity to meet the LatAm buyers is more important this year than it has been for a while. While the region is often hampered by economic volatility, many of its key markets are currently experiencing decent growth, which has a positive knock-on effect on content buying. “We mainly deal with the pan-regional Pay TV and SVOD players,” says Aguirre, “and they are very active right now. But I also know that certain kinds of international content, such as Turkish drama, also do well for the region’s free-to-air broadcasters.”

All told around 80 indie firms had suites at the Intercontinental Hotel, from which they conducted their LA Screenings business. In terms of geographic spread, there are the likes of BBC Studios (UK), Beta Film (Germany), Keshet International (Israel), Zee (India) as well as several Turkish players (Global Agency, Inter Medya, Calinos and ATV).

The Koreans were also out in force, though their focus was as much on the US as LatAm potential. Tony Kim of CJ E&M’s drama studio Dragon says his company was in LA with a mix of titles including *Live, Black, Stranger, Nine, Let’s Eat, Reply, Circle* and *Emergency Couple* (which is about a divorced couple whose feelings are rekindled when they become interns at the same hospital years later). Kim says: “We have seen substantially increased demand in our formats, especially in the US market. The success of KBS format *The Good Doctor* in the US has raised awareness of Korean creators and increased interest in working with CJ E&M and Studio Dragon, to come up with original scripted TV ideas geared towards US market.”

According to Kim, the Koreans are also targeting the US with their unscripted formats. He points to the K-Screenings event, taking place in the Intercontinental Grand Ballroom on May 16 at 3:30pm. A 90-minute screening during which 10 unscripted formats will be presented to US buyers and producers by KBS, MBC, SBS, CJ E&M and JTBC, Kim describes it as “a big plus”.

It’s a similar story with Israel’s Keshet International. While the company talked to buyers about its new drama *When Heroes Fly* (Best Series at



The Rookie



My Brilliant Friend



Das Boot

Canneseries in April), four of its top five priorities in LA are factual and gameshow. These include *The Search*, game show *Superstar Dogs*, *How Far* and *Bad Habits*, *Holy Orders*, in which five party girls abandon booze, boys and smartphones, and move into a Catholic convent for four weeks.

While there is a pretty clear delineation between the way the US studios and the indies approach the LA Screenings, some of the bigger indies went toe to toe with the majors if they had the right show at the right time. Stuart Baxter, president, international, at eOne, says: “The LA Screenings has been a particularly important event for us since Mark Gordon came on board the company. Mark has a great track record producing network shows and this is the right platform for presenting them to buyers. Key events for us in terms of timing are the February Screenings in the UK [an event that has grown up on the back of BBC Showcase], LA Screenings and MIPCOM.”

In 2018, eOne screened *The Rookie*, with an estimated 600 buyers expected in attendance. “We will present the first episode and have a lot of the talent on hand to talk about the show. We’re excited because we already have a number of people who have registered interest in markets like the UK, France and Germany,” says Baxter.

The show itself is a 13-part series that will launch on ABC in the US later this year. It stars Nathan Fillion (*Castle*) as John Nolan, “the oldest rookie in the LAPD”. At a time when the market is still skewed towards limited series, Baxter believes *The Rookie* will appeal to mainstream broadcasters looking for a story-of-the-week crime procedural with US production values. “It’s a good-humoured, accessible cop show that has the slightly retro feel of a precinct show – with the added appeal of Nathan Fillion.”

In terms of launching at the LA Screenings, Baxter stresses that you have to have a show that can hold its own against the new US studio fare: “Buyers are screening 60-80 shows over 10 days, so you wouldn’t typically come and pitch a European coproduction against all those great US series. A few non-studios companies like HBO can hold their own but not many others.”

Indeed, says Baxter, “buyers are more pushed for time now than they’ve ever been. Not only is there more drama on the market, but the shift away from output deals has intensified their workload. They used to just come and screen shows that their companies had already contracted to. But now they are actively cherry-picking shows that they think will work.”

Sonar Entertainment president, global distribution and coproductions, David Ellender, takes a slightly different line to Baxter, arguing that there is

scope for pitching some co-production, cable and SVOD series shows in amongst the mainstream US titles. “Buyers come to look at US network shows, but often they are acquiring for a range of channels – so they are looking across the entire scripted content spectrum. We had three screenings for *Das Boot* at the Four Seasons Hotel, and I expect we had around 300 buyers attending. Last year we had 450 buyers attending *Mr Mercedes* events,” he says.

Das Boot is a high-end eight-part TV series set during World War 2 and focusing mainly on the story of a German submarine crew, a €26 million coproduction between Sky Deutschland, Bavaria Fiction and Sonar Entertainment. Ellender says: “we were in a position to show buyers 20 minutes of one episode. We also had cast members and the writers present.”

Like the other indies, Sonar will target LatAm for the first few days of the LA Screenings, but Ellender sees opportunities throughout the full course of the event to discuss Sonar content. “We have second seasons of *Mr Mercedes* and *The Son*, but the Screenings is also a great forum to look into the future and have in-depth conversations about co-productions. I expect we’ll see around 400 buyers over the full ten days.”

Particular quirks to the LA Screenings format include the fact that Canadian buyers get their own screenings (reflecting the importance of US scripted series to that market). The Latin American big guns (e.g. Televisa) also screen content in a more formal way, reflecting the strong LatAm buyer presence.

Also of note this year is a new alliance between NAPTE and The LA Screenings, unveiled in February 2018. Under the terms of the arrangement, NATPE “provided attendees at LA Screenings Independents with a range of new services at a minimal administration fee to gain access to the entire event database, exclusive business driven sessions and NATPE Connect, an interactive platform to facilitate meetings on site.”

Asked about the link up, most independent exhibitors said they wouldn’t really be able to assess the value of partnership until they arrived at the event, though Aguirre says that, “there is a logic to it given the strong LatAm presence at both events.” From NATPE’s perspective, president, and CEO JP Bommel says: “This partnership exemplifies our mission to provide buyers a first look at new programming opportunities from all over the world including Canada, Latin American and Asia.” **TBI**

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LAST WORD

CARLOTTA ROSSI SPENCER



‘Comfort formats’ always work

In the ever-changing and developing landscape we find ourselves in, a trend can be anything but. As soon as a format or creative approach is labelled as such, it is no more a trend than it is status quo.

One could liken this to fashion, or even cars; once clothes are worn or cars are driven off the forecourt, their value is lessened. The same goes for TV. Instead of talking about the *now*, we should be foreseeing the future and developing with anticipation as opposed to reaction.

In a business that spans 16 territories, I spend my days analysing content markets and consumption around the world. While it is easy to identify trends, we are increasingly finding it far harder, but not impossible, to uncover what will be next for viewers.

Despite that, it is safe to say there is always an undercurrent that drives viewers to the platform of their choosing: a search for emotion and comfort. Here, as developers and acquirers, we find the “comfort formats” that, no matter the trend, will continue to attract audiences.

Comfort formats cater to a range of content. First, there are titles that focus on relationships, and not the mere thrill of dating that we have seen previously. In addition, there are formats that encapsulate true emotion while participants are building or saving relationships. Take *Love Island*, a show purely based on the evolution of relationships and *Temptation Island*, which pushes raw passion and commitment to the



limit. While the adaption of the dating format may seem an obvious thing, the concept of relationships and hardship takes it much further. Classic survival and adventure shows deliver time and again as they hit the right chord with the comfort-seeking masses. From *I'm a Celebrity* to *Survivor*, these shows continue to mutate and prosper, as viewers go in search for what is familiar.

Whether it's about letting older generations remember the ‘good old times’ or inviting younger viewers to uncover a gem from the past, the soothing easy-to-watch format is not going away, providing it can adapt to the changing needs of the audience. This year has been a clear indicator of that with the return of *Who Wants to be a Millionaire* in the U.K., *American Idol* and *Deal or no Deal* in the U.S.

Queer Eye on Netflix and *Wanna Bet?* in Italy.

This is not to say that as an industry we are out of ideas. There is a surplus of impactful formats emerging that leave powerful marks, both socially and morally. Look at *Taboo*, *Employable Me*, *I am Innocent* and *Different Like Me*. That's not to mention the entertainment formats continuing to emerge like *The Wall* and *All Together Now*. These are simple in design, having tapped into the basic yet necessary format requirements: comfort, lightheartedness and pure fun.

While comfort is key, we cannot ignore the need to adapt comfort for today's society and that requires tapping into technological advances – 360° formats that encourage digital engagement, integrated ad and social strategies that speak to the format and high-quality rigs, drones and cameras that capture every ounce of action, even underwater, for the generation that fears missing out.

The bottom line is: trends come and go, but solid, well thought-out format structures will always win an audience. So, let us forget trends and look at what audiences really want – comfort. **TBI**

It's safe to say there is always an undercurrent driving viewers to the platform of their choosing: a search for emotion and comfort

LINE-UP INCLUDES:



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DIRECTOR, UNSCRIPTED
ORIGINALS & ACQUISITIONS
NETFLIX



MICHAELA COEL

AWARD-WINNING
PERFORMER & WRITER



MATT HANCOCK

SECRETARY OF STATE
FOR DIGITAL, CULTURE,
MEDIA & SPORT



ANNA CRONEMAN

HEAD OF DRAMA
SVERIGES TELEVISION
(SVT)



BRIAN FUHRER

VP, NATIONAL PRODUCT
LEADERSHIP
NIELSEN



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