

TBI Television Business International

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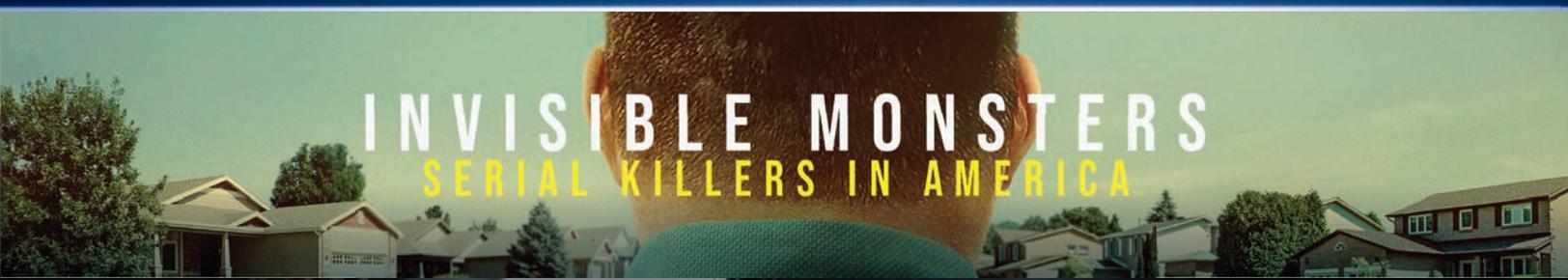
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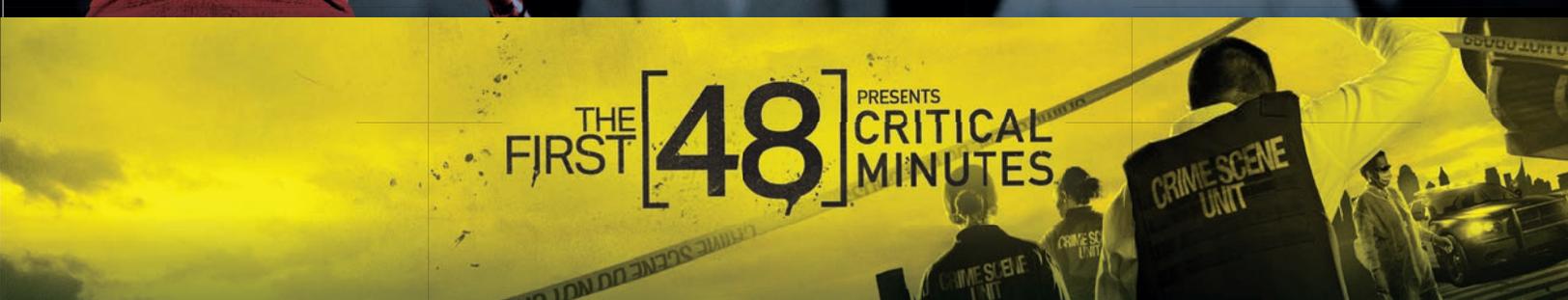


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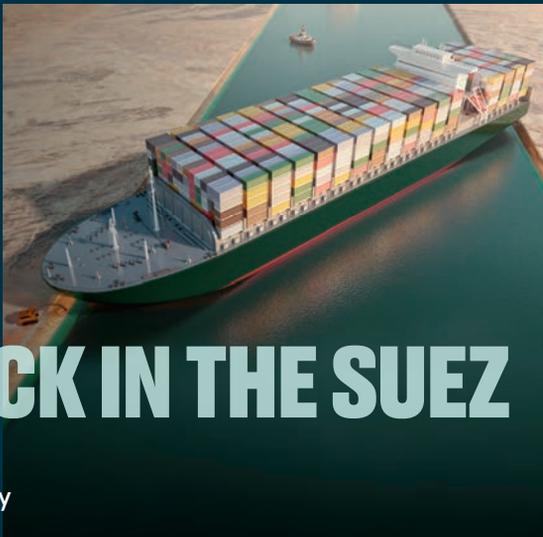
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50 min x 1, 2021

An in-depth look into the workings of cell branches reveals the unknown reality of the Chinese Communist Party.



REGENERATION From Bullets to Brotherhood

49 min. x 1, 2021

NHK exclusive: An Australian-born investment banker turns "gang pastor" in one of Cape Town's most dangerous townships.



FUKUSHIMA MONOLOGUE

49 min x 1, 2021

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Editor's note Richard Middleton

The not so new normal

So here we are: a year and a half since the pandemic hit, the biggest TV market is back. MIPCOM 2021 is, however, likely to be a very different affair to the event that most of you will have attended in 2019. It will be smaller, for one, and many of the landmark stands will remain in storage. Yet the direction of travel is clear; September was the busiest month for events since the pandemic began and the overwhelming takeaway speaking to execs who attended NEM Dubrovnik, SeriesMania and Conecta Fiction was how refreshing it was to see people in person again. This is, after all, a people business.

However, the industry has transformed dramatically since the last time most of us were in Cannes and it's not all because of the pandemic. Since the last MIPCOM in 2019, Disney+, Discovery+, HBO Max, Peacock, Paramount+ and Apple TV+ have all launched. It has been an incredible SVOD explosion and these direct-to-consumer streamers are revolutionising the business, as well as the traditional buying and selling of content. And they are doing it on a global basis. So it's fitting that we have one of the key architects behind this revolution, HBO Max International chief Johannes Larcher, to provide his take on where the market is headed and to offer a global flightplan for his own streamer.

We also reveal the findings of TBI's Distributor's Survey 2021: from Montreal, Dubai, Singapore and Paris, to Sydney, Toronto, London and LA, our report again offers a worldwide perspective on distribution at a time when the business has never been so global.

We also provide deep dives into the key trends affecting the business: how the packaging of drama is affecting producers in Europe; whether the rewards are worth the risk of financing your own factual series; and how AVOD could be a new avenue for format creatives.

Elsewhere, check out how Africa has become a go-to destination for those looking for the freshest animation while for those in the acquisitions game, explore our Hot Picks for a swathe of enticing IP heading to market. MIPCOM might not be exactly as you remember it, but the new normal in which we live is providing plenty of opportunities nonetheless.

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Contact us

Editor Richard Middleton
richard.middleton@informa.com

Deputy editor Mark Layton
mark.layton@informa.com

Contributors Tim Dams, Helen Dugdale, Nick Edwards, Tracey Forsyth, Deborah Williams

Sales manager Michael Callan
michael.callan@informa.com

Art director Matthew Humberstone
matthew.humberstone@informa.com

Marketing executive Abigail Dede
abigail.dede@informa.com

Commercial director Patricia Arescy
patricia.arescy@informa.com

Editorial director Stuart Thomson
stuart.thomson@informa.com



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110 Southwark Street, London SE1 0TA
Tel: +44 (0)20 7017 5000

e-mail: tbi@informa.com **web:** www.tbivision.com

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+7 (495) 725 57 18
SALES@NTV.RU
SALES.NTV.RU





Well-being Tracy Forsyth

How to survive the return of MIPCOM

Corporate wellness coach Tracy Forsyth offers her take on the return of physical events

Yippee! MIPCOM is back – in real life! For some of you, the return to Cannes is a wonderful thing and, like a cork ready to burst forth from a Champagne bottle, you are feeling energetic, effervescent and ready to mingle, hustle and seal some deals.

For others, you are dreading it: after living through the pandemic, anxiety is high about being with so many people, there are worries about having things to say, and feelings of being out of comfort zones while in a business situation. If this is you, then here are my thoughts.

Think like a seed

I normally plant loads of seeds in the spring to grow vegetables. This year, I had a whole tray of courgettes and I noticed that even though they were all planted on exactly the same day, in the same soil and got the same amount of water and sunlight, they all sprouted and grew at different times. Some seedlings shot through the soil very directly, others poked their stalks out and unfurled their leaves slowly. And I thought, how alike we are to those seeds.

We are all the same but react differently to the same circumstances. And it's all good. Those seedlings all grew to be strong plants but in their own time. So, think like a seed – you may need more time adapting to the new normal than others, and that's just fine.

Put your own oxygen mask on first

If you are at MIPCOM, you are likely to have travelled on an aeroplane. Now, were you paying attention to the safety briefing? That's right, they tell you that in the event of an emergency, oxygen will come down from the ceiling and you are to 'put your own mask on first' before helping others. It's brilliant life advice: make sure you have what you need to breathe, function and perform properly before hitting

the market each day. Whether it's a good night's sleep, some exercise, nutritious food, yoga – put your own oxygen mask on first.

Pace yourself

The normal schedule at MIPCOM is to be at a breakfast meeting by 8am then have 30 minute meetings (including travel time between) until you go for pre-dinner drinks at 6pm, swiftly followed by a client dinner at 7.30pm and then all meet at the bar until minimum 2am. Repeat over four days until you collapse in the car back to the airport.

Even writing that makes me feel exhausted. This time, I urge you to pace yourself! You don't have to do all of that – pick and choose what is essential. Bow out early, go easy on the alcohol and caffeine. Do what's good for you. Others may thank you if you decide to take the lead.

Fewer, focused meetings

I know it feels like the more people you see the better, but it can be draining for you and others to try to pack so much in such little time. Think about if you can schedule fewer, more focused meetings. Quality not quantity. If it really is a numbers game for you then for every 30 minute meeting you have, think of it as a 20 minute meeting with a 10 minute break. Think about walking meetings where you get to stretch your legs, breath and discuss work.

Go easy on each other

My final word is to go easy on each other. We've all been through this together and people have had vastly different experiences and may be finding it tough. This year, show extra compassion to each other, check in with each other, look after each other. And have a great time. **TBI**

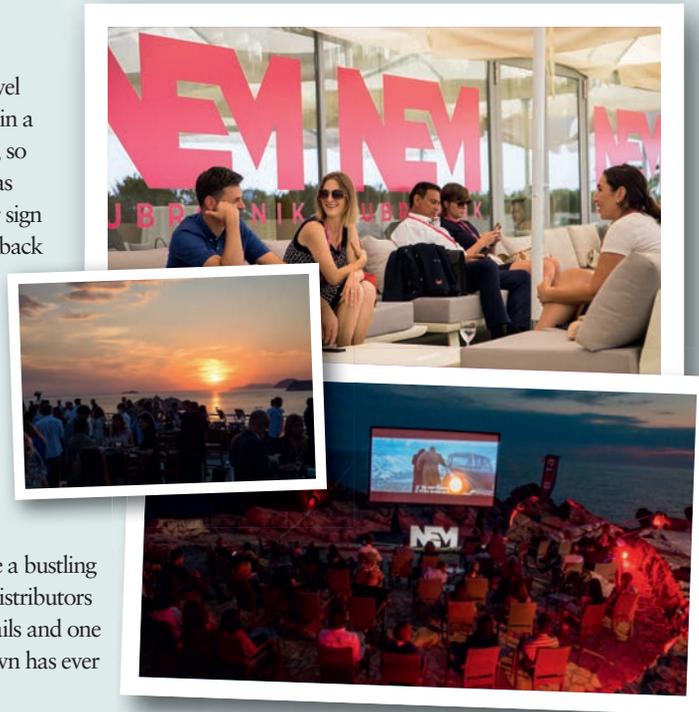
Tracy is a creative mentor for the Channel 4 Indie Growth Fund, the producer of the WFTV mentoring scheme and a professional executive coach. Follow her at [walterwootze.com](https://www.walterwootze.com)

About Town

Deal with a view

About Town is thoroughly onboard the return of travel and events, all conducted in a Covid-safe way of course, so September's relatively busy schedule was warmly welcomed and offered another sign that the circuit is slowly being cranked back into life. First came NEM Dubrovnik, in a new-look slot date-wise but thankfully in the same stunning location on the Croatian coast from a geographical point of view.

For anyone who's attended NEM's Dubrovnik event, its 'Market With A View' tagline is in no way marketing fluff. And yet despite the stunning vistas on offer, business was brisk while a bustling opening night party drew buyers and distributors poolside to enjoy fresh air, wine, cocktails and one of the finest fruit salads that About Town has ever seen assembled.



The four-day event drew the great and the good from CEE, as well as numerous execs from further afield, with panels exploring everything from rights retention and royalties to streaming and sports. The final day was rounded out with atmospheric airings of *Dead Mountain – The Dyatlov Pass Incident* and *The Silence*, courtesy of Beta Film, before the German distributor put on a party that delivered shapes on the dancefloor not seen since late 2019. Bravo!

Convening in Cambridge

The Royal Television Society's Cambridge Convention is one of the few events to have navigated the pandemic with a precision-like nimbleness that meant Covid left its scheduling largely unaffected. Its biannual nature certainly helped on that front, but the 2021 version again drew the C-suite execs to the leafy UK university city to debate the future of public broadcasters, what streamers mean to Britain and what being British means to everyone else. No definitive answers on that last one, but England football manager Gareth Southgate closed the event by providing sage advice on how he's managed a bunch of young creatives to success.



Conecta factor



The Spanish city of Pamplona again hosted Conecta Fiction, as creatives discussed co-productions between Europe and the US. Over 450 delegates attended its fifth edition, with a formal launch event in the cloisters of Pamplona Cathedral. Composer Murat Evgin entertained guests, while sessions included a fascinating discussion about Chile's scripted industry with director of Cinemachile, Constanza Arena.

Swings and Roundabouts

44 Fair to say Netflix was the winner at this year's Emmy Awards, with its shows securing 25 awards more than second-placed HBO/HBO Max, which bagged a mere 19

1 Rumours are awash in the UK that the BBC, ITV, Channel 4 and Channel 5 could be set to launch a streaming app, providing a single access point to all their content

60 Privatisation of the UK's Channel 4 could result in up to 60 production companies being forced to close, according to Ampere Analysis

10% Production costs have soared by 10% year-on-year, causing All3Media CEO Jane Turton to admit the sector is under "intense pressure"





Diversity Deborah Williams

Hitting the disability target

Disability on and off-screen has been making headlines recently, but representation remains low. The Creative Diversity Network's executive director Deborah Williams reflects on how the industry can improve

Deborah is executive director at the UK's Creative Diversity Network and has worked in arts, culture and the creative industries for more than three decades

Thankfully, it's been a busy year for the international TV industry as we come out of Covid and back towards reality – which is reflected in MIPCOM once again happening as a physical event, albeit without all of the usual attendees.

Ensuring that a post-Covid industry is far more inclusive, rather than just returning to the previous ways of working, is central to our work at the Creative Diversity Network (CDN). One example has been our partnership with the Edinburgh Television Festival this year. As a result, inclusion was embedded into the entire programme in a way that's never happened before.

Improving access for disabled people to the industry was encapsulated through making all the sessions fully accessible, but the theme ran through the panel conversations themselves too. It was also at the heart of Jack Thorne's MacTaggart lecture, which highlighted how our Diamond diversity monitoring data is being used to hold commissioners and producers to account.

For CDN, Edinburgh was a high-profile, critical opportunity to say to the industry: "Look at the things out there that you are already doing, or could easily do – small, simple things that have a massive impact on disabled people's ability to properly contribute their talent."

That's the positive news.

On the other hand, research we published earlier in the year for our Doubling Disability programme, which is backed by all the UK's main broadcasters, revealed that if we continue at the current rate, we won't hit our target of 9% of the UK's off-screen TV workforce being disabled until 2028 at the earliest – rather than by the end of 2021, as we originally set out.

It means that we in the UK have an enormous amount of work to do and I'm hoping that as we

build out of Covid, making our industry more inclusive to disabled people will be at the centre of content creation.

I am thrilled to be once again judging MIPCOM's Diversify TV Awards. We had more than 20 excellent international entries and the shortlist proves the quality. Production values are higher, but what is really fantastic is how the stories have been told. Disabled producers are making content that is strong, powerful and authentic and saying that the way you've been representing us for so long is just not right.

Another interesting perspective is how non-disabled creatives and producers think about what it might be like to be disabled - or how they don't understand disability and impairments, and haven't sought to try to understand it.

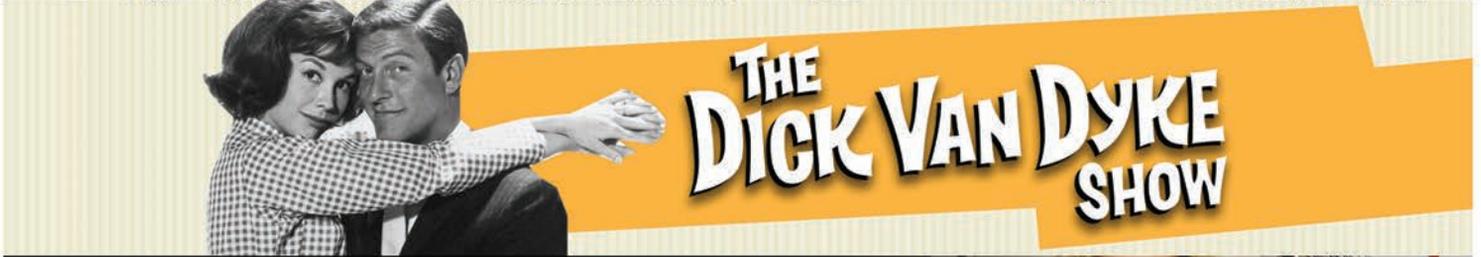
Having disabled talent at the centre of a piece of content is crucial to both finding and telling stories, but also connecting with an audience who want to see themselves and their lives reflected on screen. I was particularly impressed with the unscripted entries, but still feel there is a way to go in the drama space to properly embed and represent disabled people.

This is reflected in CDN's Diamond data, which reveals that we are still miles away in terms of writer and director representation in the UK – and I would imagine the same applies globally as well.

If you look at the We The 15 campaign, which highlights how 15% of the world's population is disabled, our data shows there's nowhere near that percentage within our industry. There's an incredible amount of work still to be done, which is kind of great because it means we have somewhere to go and means we can continue to work together.

So keep an eye open over the next few months as the network presents a roadmap to disability inclusion, which will offer everyone something to grab hold of and run with. **TBI**

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Maximising appeal

Johannes Larcher, the man tasked with leading HBO Max's international roll-out, tells Richard Middleton about originals, windowing, European plans and how streaming will look in 2026

Johannes Larcher knows a thing or two about streaming. A decade ago, he was busy setting up Hulu in Japan, which was followed by a move to the Middle East where he helped regional giant MBC launch its streamer Shahid.

Fittingly, given the times in which we live, his focus now is on a truly international play – overseeing the roll out of WarnerMedia's streamer HBO Max around the world. The aim, he tells TBI, is simple: to be in 190 countries by 2026.

For those of a global mindset, it might seem like HBO Max has been around for some time. The streamer launched in the US last year and after a somewhat slow start, has now picked up speed with shows such as *The Flight Attendant* and *The White Lotus* drawing subscribers in. But making the service available internationally – the focus of Larcher's giant remit, taken on in May 2020 – is a work in progress.

Global playbook

It is easy to forget the intense competition that HBO Max launched into as the pandemic was in its early stages last year. US studios were staking their futures on streaming, with Disney+ and Peacock making moves that looked set to revolutionise the market. Larcher says that at WarnerMedia there was, and remains, an “urgency” around HBO Max, with two main ambitions: go global and go direct to consumer.

There were some clear obstacles, not least the fact that far-reaching, sometimes long-established, rights arrangements struck with broadcasters and streamers meant some countries were effectively off limits.

“We certainly optimised within a set of constraints for the best possible results,” Larcher says of the roll-out strategy, “and one of those constraints was rights, because without a really strong availability of WarnerMedia content – be it HBO, DC, HBO Max Originals or Warner Bros. content – we simply won't launch in a country. We have to have access to that content.”

That led the HBO Max International team to Latin America and by late June this year, the streamer had been rolled into 39 countries across the region. “HBO Go was already present in the market, first as TV Everywhere then as a DTC, and it was quite successful, so it seemed like the right place to start,”



“Would we love to be in the UK, Germany and Italy sooner than the reality of the Sky deal allows us? Of course we would. Is that possible? Never say never.”



Thriller series *Kamikaze* is set to become HBO Max's first Danish original

Larcher says. “We investigated further and found pent-up demand for our programming that we could unlock if we launched smartly, so one thing came after another.”

The HBO Max exec describes it as a “wild but successful ride” since then, with the Lat Am launch instructive for those in other regions. More than 100 local productions are in the works, ranging from action comedy *Búnker* from Mexico and youth-skewing musical *Días De Gallos* from Argentina on the scripted side, and *Frankelda's Book Of Spooks* for kids. Factual shows include Argentinean football docuseries *Bilardo*, *El Doctor Del Fútbol*, while reality and competition shows are also in the works.

Customisation, content & sports

“When we launch we really try very hard to custom design our offer for that country,” Larcher says. “It’s not a carbon copy of what we do in the US. Some others do that, but we are believers that to succeed, to resonate and to build a sustainable business, you need to be in sync with the consumer and that means content customisation.”

There were other tweaks in the way Larcher approached the launch in the region. More than 70% of Lat Am viewers gain access to the internet via their mobile phone, so HBO Max offered a mobile-only plan. “They’re not interested in having a service that gets HBO Max in the living room, because that doesn’t necessarily work for them.”

WarnerMedia also spent on sports rights in Lat

Am, building on existing deals it had struck via its Turner channels, a move that shifted HBO Max into live streaming. Similar deals elsewhere seem unlikely – Larcher is clear, for example, that the sports rights market in Europe is exceedingly competitive – but he is open to exploring other live opportunities.

“I would absolutely not preclude us from leaning into live at some point,” he says while discussing the ongoing roll-out across Europe, which begins in October. “HBO Max is intended to be very broad. It is aimed at all the family, from young to old, for those who live in the city and the countryside, for the affluent and the not so affluent – this is a broad and general service, and live or sports can be a very important element to broadening that appeal.”

The next destinations on Larcher’s international flightpath lie in Europe, with HBO Max set to be available in Sweden, Denmark, Norway, Finland and Spain from 26 October. Next year, it will be accessible in Netherlands, Turkey, Greece, Iceland, Estonia, Latvia, and Lithuania, notable because the company has not had a direct-to-consumer presence there before.

Again, the service will be stocked with WarnerMedia’s Hollywood content – the “backbone” of the streamer, as Larcher describes it – but there are also swathes of local content being ordered, such as a first Danish original with *Kamikaze*. And again, programming will cross all genres, reflecting the broad commissioning strategy of HBO Max in Lat Am.

Delivering content to DTC customers in

Europe is also having a further impact on the way WarnerMedia is dealing with windowing. The company recently revealed the latest theatrical blockbusters from Warner Bros. would be available on HBO Max 45 days after their theatrical release this year, with the changes apparent from launch in the Nordics, and from next year in Spain, Portugal, Central and Eastern Europe. It again underlines the power of streaming in the current DTC landscape.

Hold-ups & outlook

There are, of course, some notable exceptions to HBO Max's roll out in Europe, namely because of far-reaching rights deals struck before Larcher landed at the company. Most crucially, the US studio is unable to launch arguably its most important ever product in most of the continent's biggest markets – the UK, Germany and Italy – because of a rights pact struck with Sky until 2025. At the time of the deal, the pact seemed strange but Larcher is philosophical.

“Sky is a very valued partner, they promote our content very successfully in Italy, the UK and Germany, paying us a significant amount of money to have access to that content. And by the way, that revenue then helps us to fuel the expansion of HBO Max globally,” he says.

However, he admits: “Would we love to be in the UK, Germany and Italy sooner than the reality of that deal allows us? Of course we would. Is that possible? Never say never.” There is, Larcher says, nothing else that can be said on the Sky front at this point, but the ambition is understandable. He is also hopeful that a launch in France – where Orange took HBO rights in 2017 – will come sooner.

In the meantime, the focus is on expanding where possible – with roll-outs in Asia on the cards. Larcher praises current regional streamer HBO Go, pointing to the success of shows such as Philippines crime drama *On The Job*, and says in the long-term HBO Max will replace the service.

“We recently put in new leadership with [former Disney+ exec] Amit Malhotra and he has big plans,” Larcher says. Dates for launch have not yet been set but local content will again be a major pillar alongside HBO Max's US series, which range from drama like *Succession* and *Peacemaker*, to reality dating series *FBOY Island*.

“We believe deeply that to succeed locally, you need stories that are relevant,” Larcher says of the local content strategy, highlighting Spanish series *Thirty Coins* as a show that travelled back to the US.

But at the heart of the streamer, on a global basis, is a broad service across genres. Larcher says there

is no reason why HBO Max can't be “one of the top three general entertainment streaming services globally”, something that seems feasible should the WarnerMedia and Discovery deal progress. With the deal going through the machinations of the US regulators, Larcher says he can offer no update, but the importance of the scale play is clear.

Indeed, the HBO Max exec points to streaming rival Netflix. “If you look at what they reportedly spent per subscriber on content in 2020, it was \$57. In 2024, it'll be roughly \$61 per year – that's growth of around 7%.” Flip that to absolute terms, however, and the results are startling: \$11bn spent on content in 2020, up to \$18bn in 2024 – a rise of 64%. “Scale really matters – \$7bn buys you a lot of movies and TV series,” Larcher says.

Such numbers explain why regional and even country-focused streamers will likely face growing pressure over the coming years, but the HBO Max exec says the ecosystem can remain peppered with

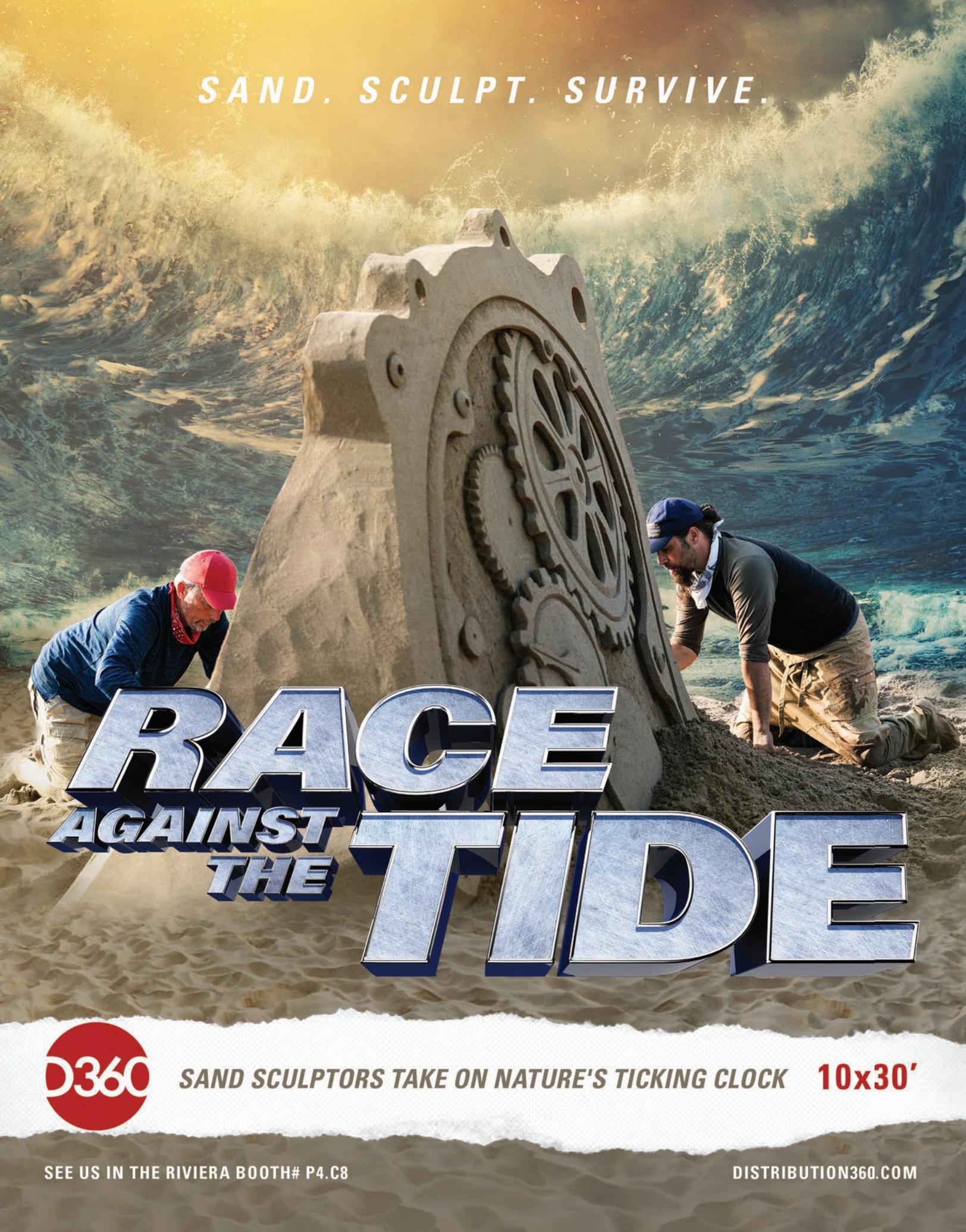


Reality dating show *FBOY Island* underlines HBO Max's broader genre offering

companies of myriad sizes. “It will be very difficult to compete on that level of content spend without having the sufficient scale long term, so they need to find an angle that allows them to stay relevant,” he says. “Shahid, for example, has the expertise of Arabic content. Videoland in the Netherlands are doing the same with Dutch content,” he continues.

“These things can coexist,” the exec adds, but on the international battleground where Larcher is operating, scale and dominance is vital. For companies such as WarnerMedia and HBO Max, the next few years will define their future. **TBI**

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TBI Distributor's Survey 2021



With more than half a million hours of programming between them, respondents to this year's TBI Distributor's Survey truly represent the global content business. With insights from London, LA and Sydney, to Paris, Tel Aviv and Toronto, join us as we dive into the key trends affecting distribution in 2021

From the potential of AVOD to the strategies being employed to secure premium scripted product, TBI's Distributor's Survey 2021 has revealed a fast-changing sector dealing with rampant change.

As last year, the Survey has been broken into genres to provide in-depth insights that highlight the experiences of different sectors. Those working in scripted, for example, are finding ad-supported streamers are offering little to their bottom line, yet unscripted distributors reflect a bullishness for AVOD potential. One constant across genres, however, is the optimism that 2022 will bring growth.

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Scripted: The drama of delivery

Production pauses during the past 12 months have put a heavy strain on scripted distributors, but the launch of numerous US-based streamers is widely seen to have had a positive impact

Scripted remains a major subscription driver for streamers and demand for premium content is high, yet the pandemic's effect on production is clearly impacting bottom lines.

For some distributors, the disrupted production process, thinner pipelines of content and the increased costs of Covid are having a deep impact. More than a third of respondents reported that the pandemic's effect on their total revenue, as a percentage, was greater than 25%, while more than 15% said that Covid had resulted in a revenue decline of more than 50%.

Yet clearly some companies are proving better able to navigate pandemic-induced problems, with more than half of respondents reporting that their annual revenue had been little impacted – or had even increased – as a result of the pandemic.

Around 20% of companies confirmed that they had been forced to lay staff off as a result of the pandemic, but there was an overwhelming feeling that 2022 is set to bring better fortunes, with more than 80% expecting their own businesses to improve over the next 12 months and more than 90% expecting the market as a whole to grow.

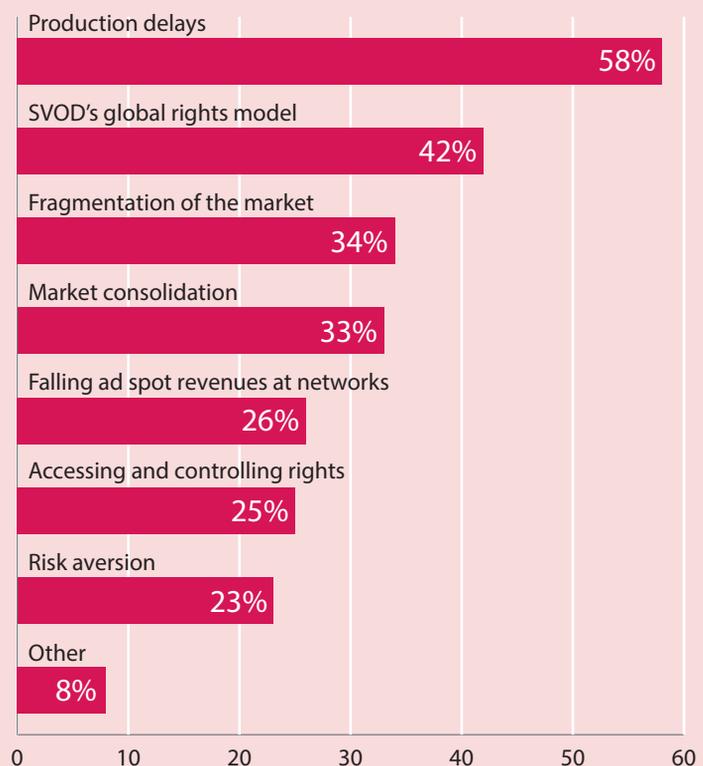
Scale & genres

Almost all companies also expect their catalogues to increase over the next 12 months while crime, thrillers, drama and comedy were all highlighted as best-selling sub-genres. Uptake of online distribution platforms has also become a mainstay of the business, with half of respondents confirming they use such services for sales.

Audience consumption, namely streaming replacing linear, continues to shift the plates of the scripted sales business. Greg Phillips, co-CEO & founder at *Staged* distributor Rainmaker Content, says the shift of “at home viewing” has been the biggest single effect of Covid on the business over the past 12 months, while Chris Bonney, CEO of rights at *Tehran* distributor Cineflix Media, says production hiatuses have helped his business.

“Sales activity increased as a result of the delays on production due to Covid-19. We have been able to meet the demand from buyers – including AVOD

Which of the following issues – outside of Covid – has provided the greatest challenge for scripted distributors over the past 12 months?



17%

have had to lay off staff as a result of the pandemic

and SVOD platforms – to fill their schedules with ready produced content,” he says, with a second run of *Tehran* for Apple TV+ in the works.

While streamers are requiring more content, their global rights demands remain a source of contention and more than 40% of scripted distributors said this provided the greatest challenge for their businesses, putting the pandemic to one side. Fragmentation of the market and falling ad spot revenues at networks were also cited, while almost 60% of respondents said production delays had affected their operations.

Finance & timing

There has also been a development in the way that distributors are securing content, with more than

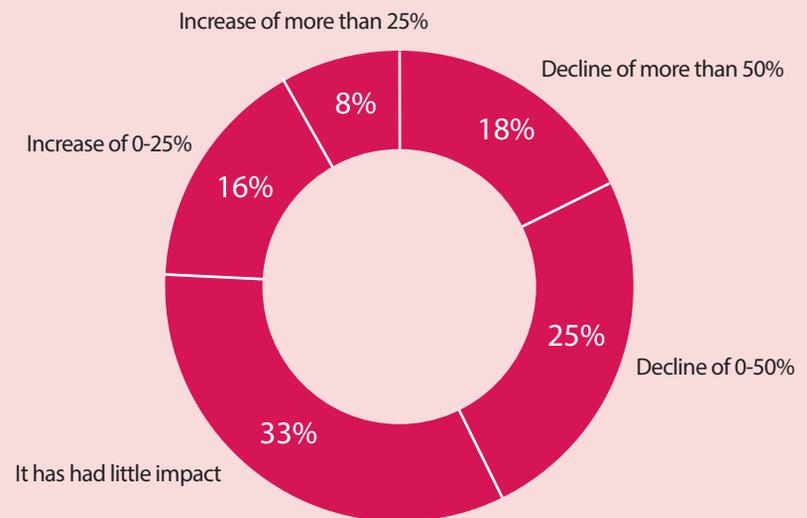
two thirds of respondents confirming that they are not financing scripted series earlier than previously. This contrasts with the 2020 Survey, when more than half said they were financing earlier than ever before. Speaking to distributors, the reason seems clear: they have been investing in shows at the earliest possible opportunity for some time now.

The proliferation of US streamers going global largely coincided with the pandemic and while this SVOD flurry had some impact in last year's survey, it is clear that the expansion of HBO Max, Discovery+ and Paramount+ is having an effect.

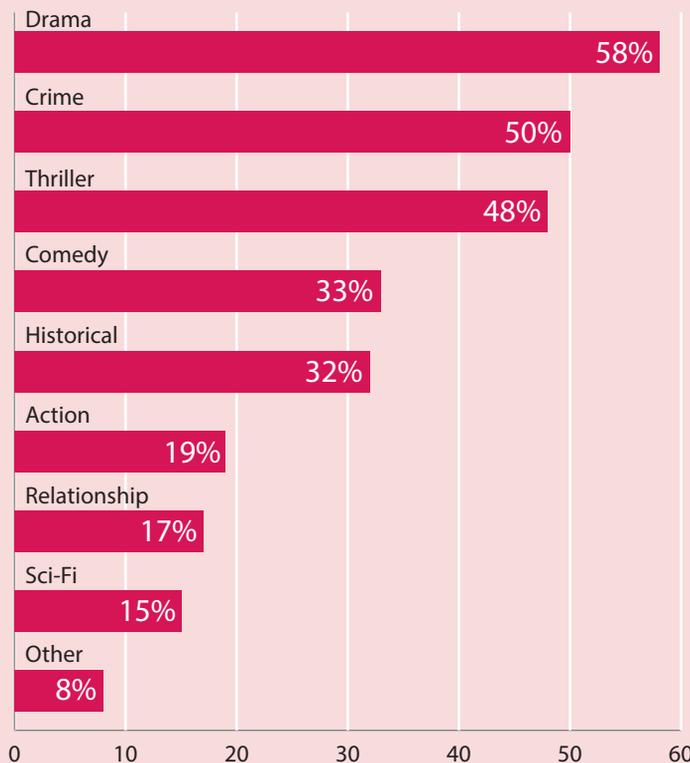
Overall, the feeling is positive, with more than two thirds believing that these giant streaming services will have a beneficial effect on the distribution business. "They will acquire scripted drama where needed and critically there are plenty of other end-users of scripted product eager to engage on high-quality well-made drama and play in their schedules," explains Phillips.

For Bonney, the "warehousing of studio content" can cause supply problems but it can also work as an advantage by "opening up opportunities with producers seeking an independent distributor, like ourselves, who can give them a tailored approach and dedicated attention in order to maximise the

What effect on total revenue, as a percentage, do you think Covid-19 has had on your business this year (Apr 2020-Apr 2021)?



What sorts of shows are selling best for you?



value of their IP."

The Cineflix exec continues: "We are rapidly growing our business with existing and new SVOD platforms such as Apple TV+, Paramount+, as well as leading AVOD players such as Hulu, Pluto, and Roku.

"Alongside this, we are expanding our producer relationships and continue to diversify our content offering to meet the demand from these buyers. For example, we have been expanding our scripted activities and making more funding available to acquire the right content to meet this additional demand," Bonney says.

And while AVOD is cited by a number of execs as an area to watch, its impact on bottom lines remains muted for the global business. Almost 60% said ad-supported streamers contributed less than 10% of overall revenue between April 2020-21, although the majority said they expected growth – albeit limited – over the next 24 months.

Alongside the pandemic and US streamer launchers, the other mainstay of the business over the past 12 months has been consolidation. Few expect this to let up; indeed, 58% of respondents believe mid-sized firms are most at threat from the market conditions. "Larger firms have consolidated and started to dominate the market," says Rick Barker, head of sales at *Frankie Drake Mysteries* firm DCD Rights. "Now, they're looking for agile mid-sized companies to acquire further catalogues," he says.

Unscripted: Keeping it real

Unscripted product was in demand pre-pandemic and this has continued to rise, with the launch of new US-backed streamers opening up even more opportunities

Unscripted content is currently enjoying a boom, buoyed by the rise of global streamers, a rising audience demand for true stories and the pandemic, which brought most scripted productions to a crashing halt last year.

The question, however, is how long this spike in sales will last, now that most productions are back on their feet and commissioners are less reliant on unscripted orders to plug the gaps than they were 12 months ago.

Covid recovery

Factual does seem to be getting over the worst of the Covid-19 hump, with the highest percentage of respondents – 35% – telling us that the pandemic has had little impact on their annual revenue.

The contrast with 2020 is instructive: 12 months ago, the highest figure in our Survey was 27% of respondents confirming that they had seen declines of as much as a quarter of their annual venue.

In-fact, this year's Survey, which covers April 2020-2021, found that 12% of companies had seen their revenue go up by more than 25%, which was also broadly in line with last year's responses. However, it's not an outright cause for celebration just yet, as 18% also noted that they had lost between 25% and 50% of revenue.

Better news was that almost all respondents said they had made no staff lay offs due to the pandemic and there was a great deal of optimism looking ahead, with all respondents also expecting the next 12 months to bring improvements to their business, as well as in the market as a whole.

There are, of course, still challenges to overcome and innovative workarounds to be found in dealing with the ongoing global crisis. As Pamela Martínez, MD and head of sales and acquisitions at *Lovesick* distributor Limonero Films, shares: "We have had to come up with creative solutions around meetings buyers, pitching projects and closing deals.

"The worst effect has of course been felt in the production of new shows. Everything had to be stopped and now it's increasingly difficult to film

internationally, with the result of delayed or cancelled productions for new shows."

Streaming strategies

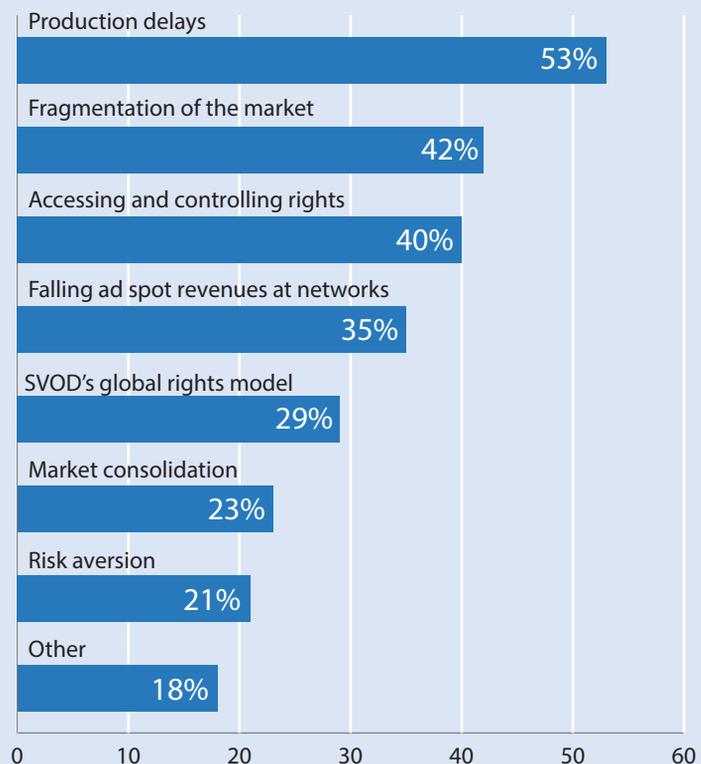
On the selling front, wildlife programming currently appears to be in high demand, with numerous respondents citing both these and "uplifting" and "warm-hearted" factual entertainment series being among their most sought-after content. True crime was another stand-out, with continuing series in this genre proving a hit with buyers.

This appears to be a combination of an ongoing audience demand for the kind of positive and escapist content that was sought during the first lockdowns –

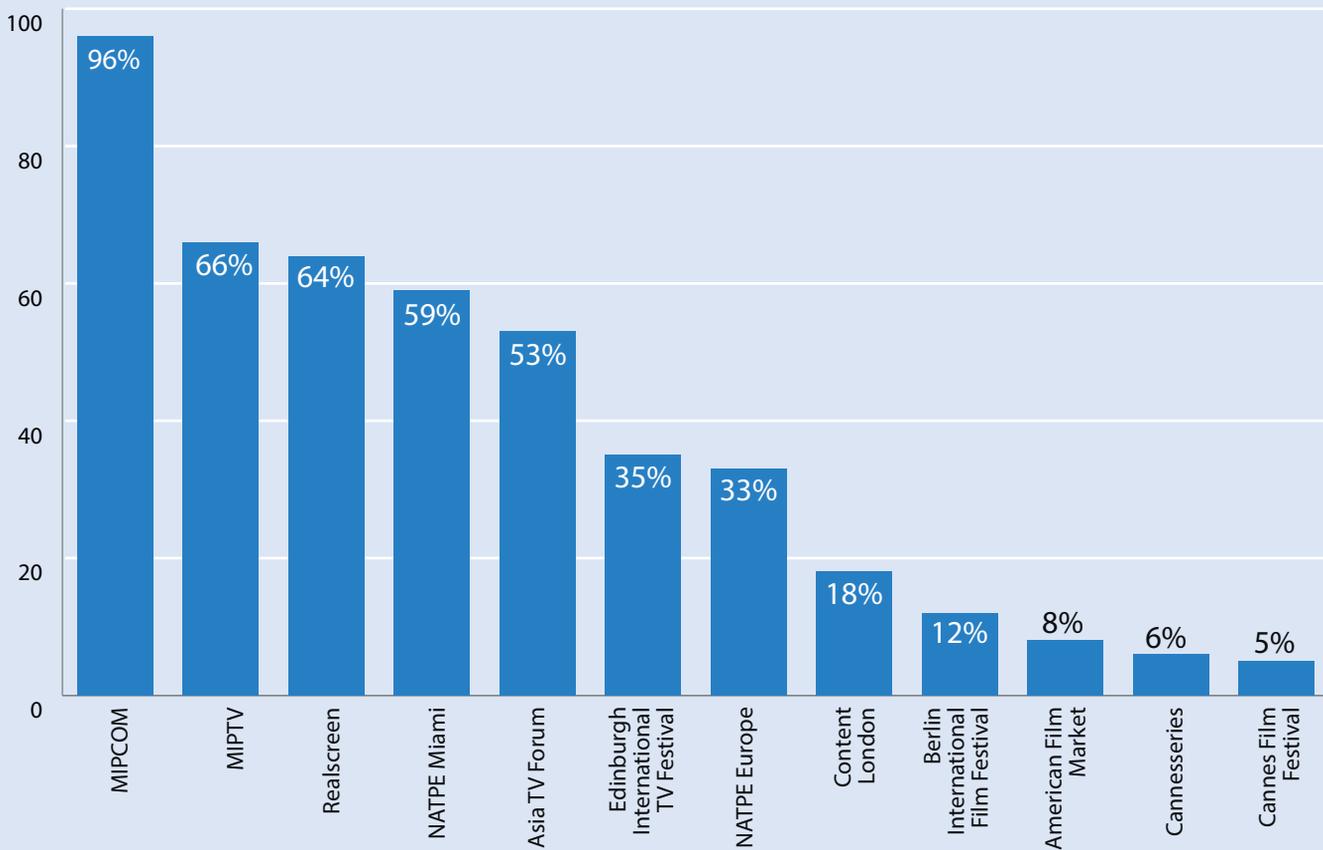
71%

of respondents believe the launch of US studio-backed streamers will have a positive impact on their business

Which of the following issues – outside of Covid – has provided the greatest challenge for scripted distributors over the past 12 months?



What markets do you consider must-attend?

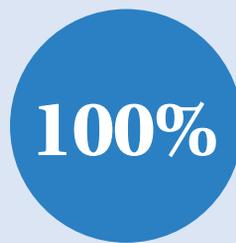


as well as the typically high interest in these genres of programming.

“Entertainment and formats in particular remain in huge demand,” adds Nick Rees, COO of *RuPaul’s Drag Race’s* distributor Passion Distribution. “We’ve achieved an extraordinary level of success in increasing the number of local versions for our key formats. We’ve also generated solid revenue from premium factual series and singles.”

With optimism buoyant, it is not surprising that almost more than half of respondents said they were ordering projects without a commissioning broadcaster or streamer attached. While this is historically seen as a risky proposition, it reflects an increasing trend in distributors taking the gamble on ambitious projects that, for example, might not otherwise get off the ground in a timely manner.

“We did this in the early stages of lockdown and it allowed us to go to market quickly with a ready-made product that nervous broadcasters would not have to fully commission in order to access. It kept the team employed and busy through 2020,” shares Koulla



expect the market to improve in the next 12 months

Anastasi, commercial director at *Surviving A Serial Killer* distributor Woodcut International.

Streaming strategies

The launch of the US-backed global streaming services in the past year or so has certainly shaken up the landscape too and unscripted distributors seem to overwhelmingly regard this as a good thing.

More than 70% of respondents said they believe that these launches will lead to a positive impact on their business within the next 24 months, while just 6% think it will have a negative effect.

As Banijay Rights CEO Cathy Payne sees it: “The growth of both the international (largely US-backed) SVOD platforms and the growth of domestic VOD offerings provides increased opportunities for Banijay in terms of both production and catalogue sales.

“There are also openings as a result of the US studios retaining product for their own services. In addition, the growing AVOD market provides increased opportunity for the catalogue.”



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Formats: Adapt & adopt

The format business found itself deeply affected by the immediate impact of the pandemic, but recognisable brands are finding demand from risk-averse commissioners. But where does that leave creativity?

Formats are finding surging demand not just from broadcasters looking to reduce their risk profiles, but also from streamers seeking unscripted content that they can remake globally.

Yet there seems to be a contrasting picture between different parts of the format business, with those holding the established, big name brands enjoying steady growth through the pandemic. For distributors representing new formats that have been little tested, the current market is far more challenging although opportunities are apparent.

This state of the market is clearly reflected in how format distributors have found their revenues affected by Covid over the past year. Twelve months ago, 43% of respondents said their revenues were down between 25% and 50% – and a further 12% said they had seen declines of between 50%-75%.

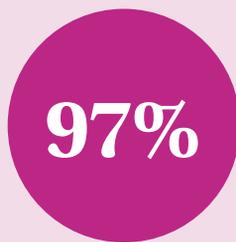
Fast forward a year, and the impact of Covid is now being seen as an opportunity, with the vast majority of respondents claiming that the pandemic has had either no impact on total revenues or a positive impact. As with other areas of the distribution business, however, it is a nuanced situation.

“Revenue has been delayed – as opposed to declined,” says Cathy Payne, CEO of Banijay Rights and purveyor of *Big Brother*, *MasterChef* and *Survivor*. Across all genres, Payne says the pausing of productions of formats such as *Survivor* and hiatuses on premium scripted has meant around 20% of Banijay’s revenue from 2020 has been delayed to 2021.

Despite these constraints, format distributors have been able to navigate squeezed revenues without cutting staff, with no respondents saying they have enforced lay offs directly as a result of the pandemic.

There is also widespread optimism that the situation will improve, but it is clear that broadcasters in particular have reacted to the pandemic and its effect on their own revenues by further reducing their risk appetite.

“Broadcasters are more risk averse when it



consider MIPCOM a must-attend market

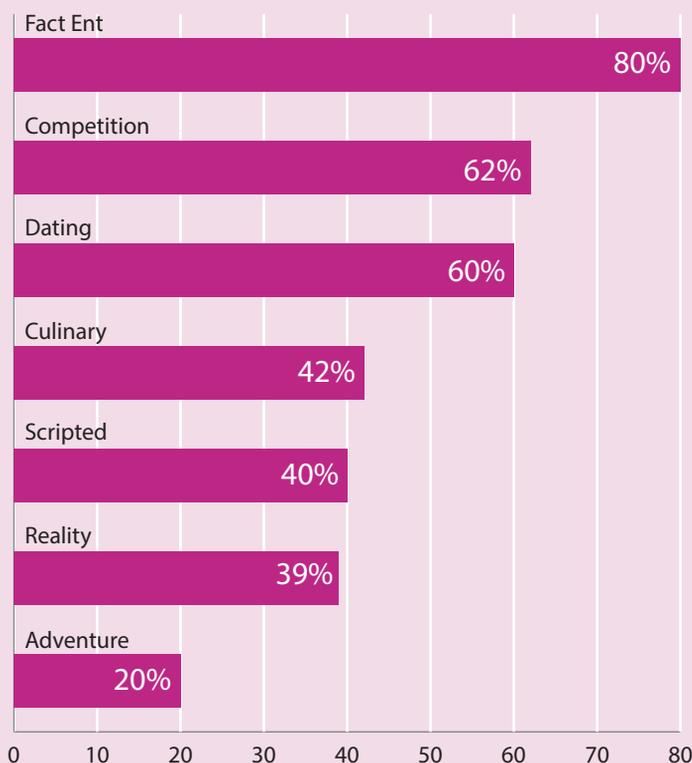
comes to commissioning new ideas,” says Andrea Jackson, CEO at *Fittest Family* firm Magnify Media, who adds that there is a reliance on established brands.

For some companies, this is clearly a boon, while the pandemic’s impact on the format market has also been split depending on the types of shows being sold. Shows requiring large studio audiences or globe-trotting adventure formats have of course been hampered by social distancing restrictions and travel bans, while more easily managed formats have surfaced more success.

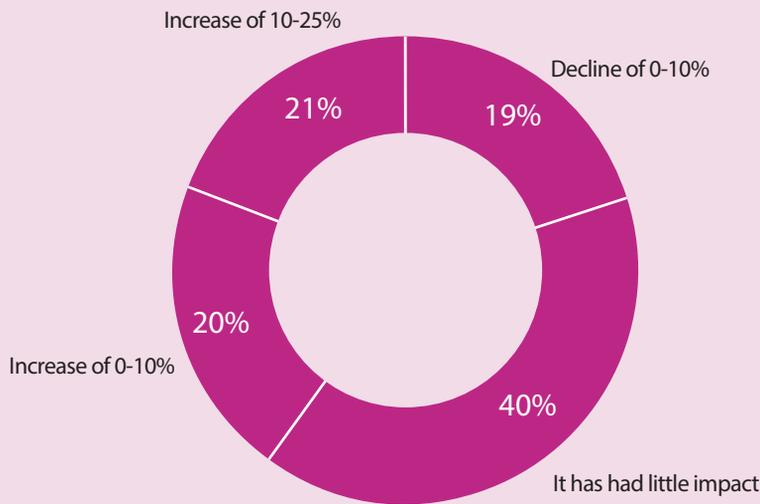
“It’s been well documented that the pause in production has affected pipelines and broadcaster schedules across several genres, including in the formats space, over the last year,” says Payne.

“But while there’s been a delay on some

What sorts of formats are selling best for you?



What effect on total revenue, as a percentage, do you think Covid-19 has had on your business this year (Apr 2020-Apr 2021)?



But again, it is a nuanced picture and looking ahead, it is clear that while distributors expect the number of players on the buying side to grow, there will be continued M&A activity that will thin out the field to some degree.

“Future consolidation is anticipated,” says Payne, but she adds that there have been “an increasing number of VOD platform launches, both international services and of course expansion of what were initially domestic linear catch-up services into fully fledged VOD offerings.”

“Meanwhile, SVOD and AVOD sectors are prominent in every territory and there’s no doubt AVOD will continue to grow and has done so throughout the last year.”

Such a view is prevalent and explains the reasoning why more buyers are anticipated to enter the market. AVOD is also becoming a notable option for format distributors, although almost 80% of respondents said it still only provides around 10% of their annual revenue, reflecting the lag between the ad-supported streaming sector and its subscription counterpart.

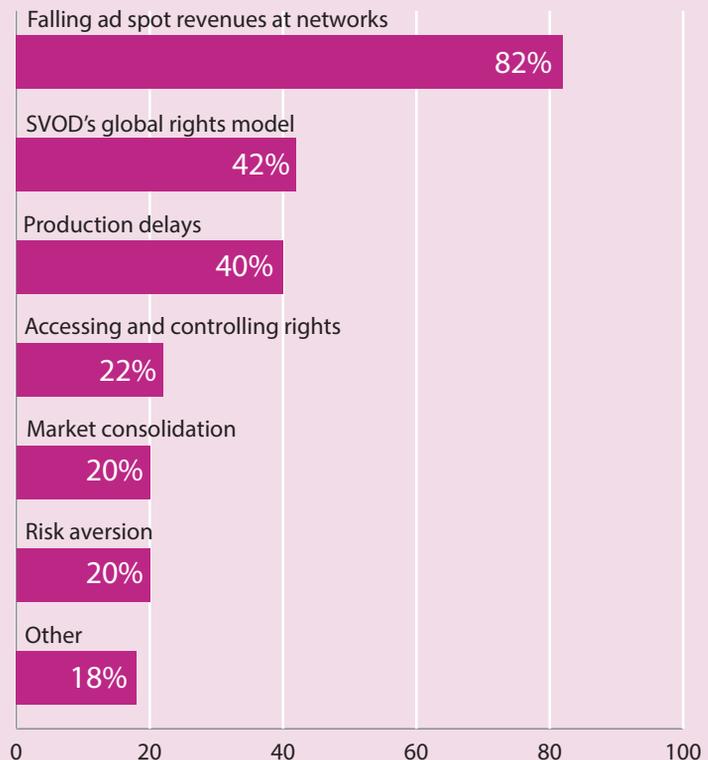
product, we have been fortunate to have a growing catalogue of more than 110,000 hours that includes content produced in its home territory without the need for international travel, with shows such as *MasterChef* and *Big Brother*.”

For those with such heavyweight, instantly recognisable formats, the current market conditions seem favourable and demand is high. Across the Survey as a whole, sub-genres such as competition, culinary and dating remain hot, but it is factual entertainment that – like last year – is the best seller, with almost 80% of respondents citing it as being among their most popular genres for the buying fraternity.

The influx of streamers, and the increasing appetite amongst them to buy formats, is also reflected in this year’s survey. It is not all positive – 40% of respondents said that the greatest challenge for distribution over the past 12 months, outside of Covid – has been the SVOD’s global rights model, underlining recent discussions highlighting the rights issues that smaller distribution firms face when dealing with global streamers. Above and beyond that, however, was the falling ad spot revenues at networks, which 80% of respondents said was a major challenge.

Despite this, most respondents believe there will be more buyers in two years time than there are currently, largely driven by streamers at both a global and regional level moving deeper into unscripted programming.

Which of the following issues – outside of Covid – has provided the greatest challenge for scripted distributors over the past 12 months?



Kids: Cautious optimism

The children's TV sector has remained resilient in the face of the Covid-19 pandemic, with many distributors enjoying strong animation sales despite delays from uncertain clients

Kids content is quickly presenting itself as a major backbone of what global streamers can offer to their subscribers to stand out from the competition.

As a result, quality content is in higher demand than ever before as new services spread into new territories and expand their content offering, alongside the activities of traditional broadcasters.

This no doubt contributes to the Survey findings, which show that the sector has continued to remain largely resilient in the face of the pandemic – as was also our Survey's findings last year.

Some 36% of the respondents said that the pandemic had little impact on their total revenue during the period from April 2020 to April 2021, a minor drop from the

38% who said the same thing the year before.

In fact, 18% of respondents reported that their revenue has risen by up to 25% as a result of the pandemic, an increase from the 15% of the year before, when many schools and nurseries remained closed, and youngsters spent more time than ever in front of their various small screen devices.

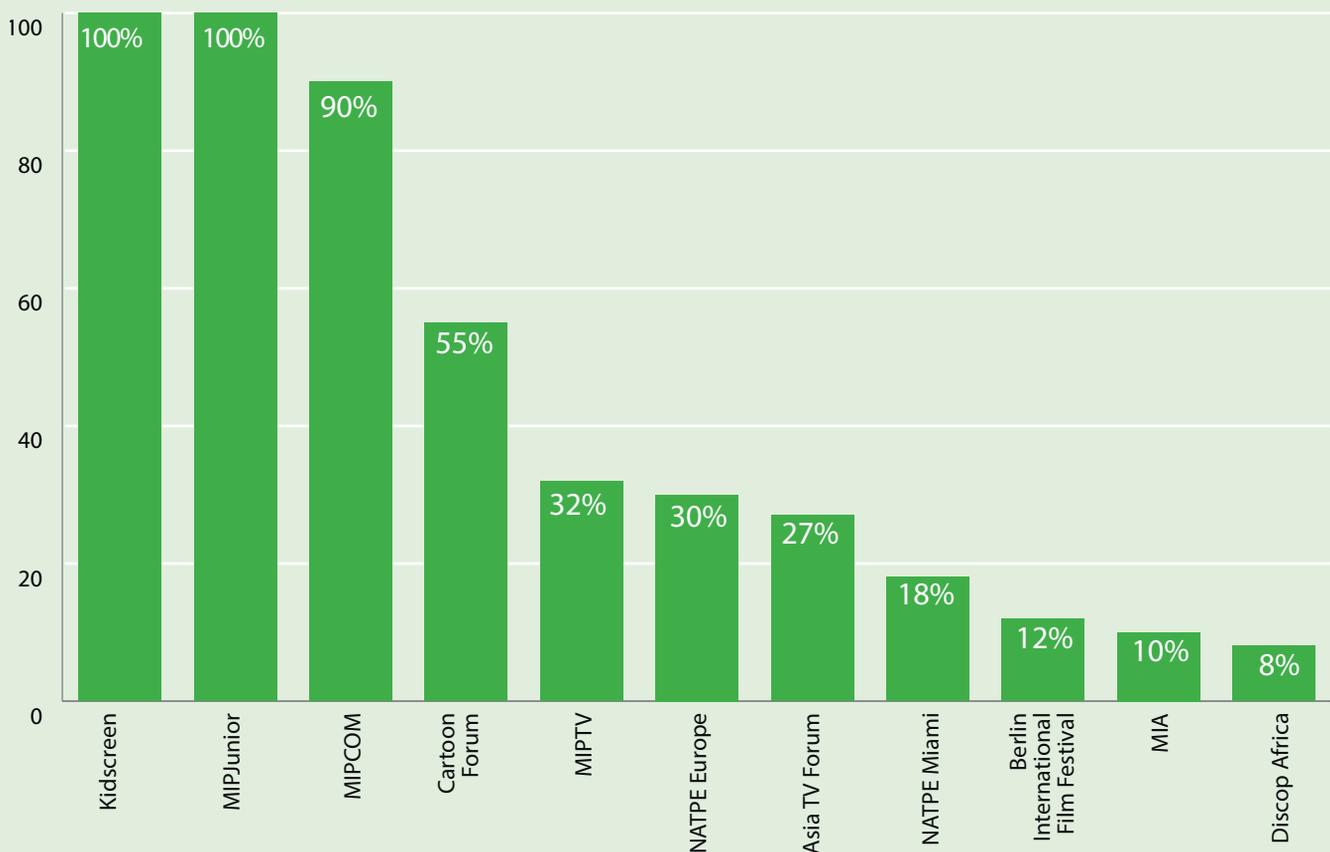
The picture looks optimistic for children's content distributors too, with around nine out of ten expecting both their business and the market to improve over the course of the next 12 months, with more than 80% adding that their catalogues are larger than they were a year ago.

Dominic Gardiner, CEO of *Moley* distributor Jetpack Distribution, suggests that the pandemic has had two



82%
of respondents said that animation was selling better than live action content

What markets do you consider must-attend?



main impacts on the kids' industry. The first, he says, is that production has been impacted, "especially live action," while the second is "being able to sell face-to-face. It's been very challenging to make the same connections with people when you can't see them. Software is not quite there for presenting video."

Other respondents raised the same points as Gardiner, while the Survey results corroborated this increasing animation domination, with 82% revealing that it has been selling better than live action over recent months.

High content demand

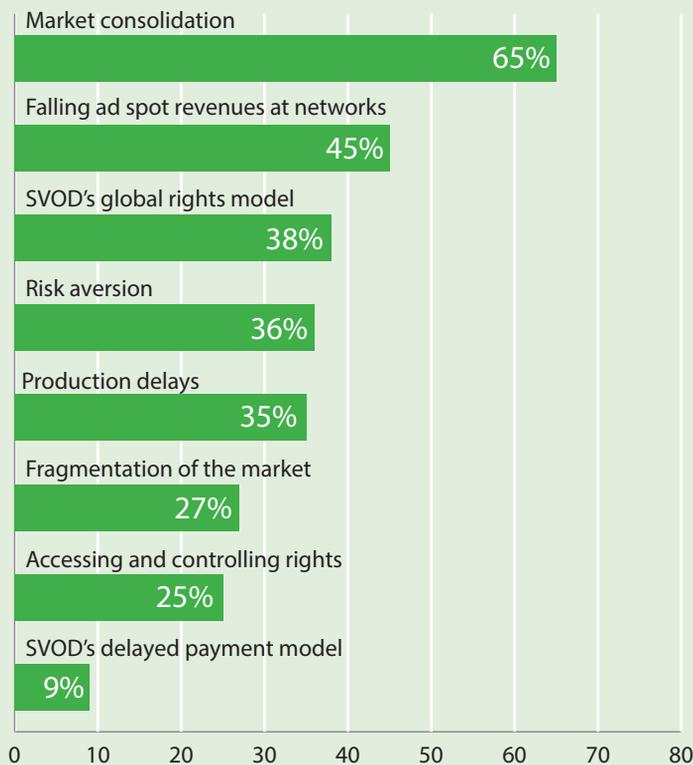
Aside from the pandemic, 64% of respondents said that market consolidation had presented the greatest challenge for kids' distributors over the past 12 months. Falling ad spot revenue, risk aversion, the aforementioned production delays and SVOD's global rights model were all also raised as points of concern.

The latter may have some bearing on the relatively cautious view expressed by distributors about the role that newly launched US studio-backed streamers will have on the market.

What impact do you think the launch of US studio-backed streamers will have on your business over the next 24 months?



Which of the following issues – outside of Covid – has provided the greatest challenge for scripted distributors over the past 12 months?



While many of these services are looking to snap up content, only 45% of respondents believe they will have a positive impact on their businesses. Just under 20% said their impact would be 'very' positive, with one in ten expecting a negative impact on their operations.

One respondent acknowledged that the rise of these services could reduce the quantity of what broadcasters acquire, but highlighted that the amount of hours they need for their libraries is relatively high, which is "extremely good" news for kids' distributors.

Nevertheless, 55% of respondents said that they believed there will be more buyers for their content (both streaming and broadcast) over the next 24 months, with just 27% expecting fewer.

Several distributors also highlighted that they expected "plenty" of VOD platforms to launch, replacing demand from traditional media. One commented that: "We believe the channels will still acquire content and TV will still be playing a part in the market. To that we can add the fact that the SVOD market is still in development, and many different services are being created."

AVOD, meanwhile, demonstrated its steadily growing importance, highlighted as a moderate source of revenue for most respondents, with only 18% not selling content to such services at all.

The majority – 55% – said that AVOD sales made up around 10% of their overall revenue, while 9% of respondents revealed that they contribute between 25% and 50% of their total sales.

Conclusion: Adaptability reigns supreme

Far from the unmitigated disaster that was feared, Covid-19 has thrown up opportunities for some distributors while new streamers are opening new doors and providing reasons to be optimistic

Twelve months ago, distributors were united in their understandable concerns about an uncertain future, with the TV landscape thrown into disarray by the pandemic.

Fast forward a year and the picture in 2021 is much more positive, with the vast majority of respondents across the genres – scripted, unscripted, formats and kids – reporting that the global crisis has ultimately had little impact on their overall annual revenues. Some say it has even considerably improved bottom lines.

It was by no means a wholesale escape from disaster, however. Many companies this year reported revenue drops, but there is an emerging narrative that perhaps the legacy of Covid may be that of a dodged bullet for the distribution side of the industry. Furthermore, there is widespread optimism that the situation will improve.

Unscripted demand remained buoyed by the petering out of scripted productions last year and a growing trend towards true-life stories, while new global streamers and the expansion of existing ones – all hungry for content – has also been a boon.

Indeed, the proliferation of streamers and the overall feeling about what eventual impact these services will have on the distribution business is mixed among sectors, with more than 70% of unscripted respondents and around two-thirds of scripted seeing them as having a positive impact.

The kids' sector was more cautious, despite the growing importance of children's programming to these services. Only 45% of respondents said that they believed the streamers would have a positive impact on their businesses, while many, including 40% of format distributors, said that the greatest challenge for distribution over the past 12 months – outside of Covid – has been the SVOD's global rights model.

AVOD, meanwhile, was singled out as an area to watch though most respondents said it still only provided around 10% of their annual revenue.

On the programming front, crime, thrillers, drama and comedy were all highlighted as best-selling scripted genres, while true crime continues to sell well in the factual sector. Competition, culinary and dating formats also remain attractive, but fact-ent retained the best-seller crown in formats this year. In kids' sales, animation reigns supreme, with 82% responding that it is selling better than live action content.

Analysis: Tim Westcott, Omdia

As the old proverb goes, it's an ill wind that blows no good. One of the more striking findings of this year's TBI Distributor's Survey is that the Covid-19 crisis translated into improved sales for most distributors in the year from April 2020 to April 2021. Just under a third of scripted respondents said they had seen an increase in sales, and a third said the crisis had no impact. Admittedly, another third reported a decline – half of these suffered a decline of more than 50%.

Almost all respondents expect things to get better in the next 12 months. Production delays were cited as the main challenge posed by the health crisis – one challenge that is now largely behind the industry.

“The launch of new direct-to-consumer platforms by the big US players is seen as a positive by around two thirds of those in scripted distribution”

Tim Westcott, Omdia



It's also significant that the new SVOD players' global rights model is a challenge cited by 42% of scripted respondents, while a related development – the launch of new DTC platforms by the big US players - is seen as a positive by two-thirds of the genre's distributors.

For unscripted, the results largely tell the same story. There was less of a clear split between distributors who did well or badly in the last 12 months, and a slightly higher level of doubt about whether things will improve over the next year – but still 82% of respondents expect the market to improve.

Production shutdowns were also cited as the main challenge of the last year, but fragmentation of the market, falling ad spot revenues at networks, and accessing and controlling rights were all cited as bigger changes than the global rights strategies of SVOD players.

There is also a widespread belief that the events sector will remain important, with MIPCOM consistently ranking as 'must-attend' regardless of genre. While October's event looks likely to have come too soon for some, there is clearly a desire to return to meeting face-to-face. In the meantime, distributors are adapting and maintaining agility in a fast-changing market. With the ongoing effects of the pandemic and the streaming revolution, those qualities have never been so important. **TBI**



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In pursuit of packaging



While packaging is common in the US, the practice is less known in Europe but its prevalence is beginning to become more widespread. Nick Edwards find out what this spells for the future of scripted TV in the region



In its most traditional form, ‘packaging’ refers to the practise of approaching channels or streamers with an idea for a show that one or more well-known actors, and/or possibly a famous director or established screenwriter, are attached to.

The term has been in US headlines over recent years as a stand-off between writers and their agencies reached an impasse. In America, where almost 90% of the series produced are ‘packaged’ – and of those around 80% are done so by the larger talent agencies (Creative Artists Agency, William Morris Endeavor, United Talent Agency, and ICM Partners, often referred to as the big four) – writers felt working practises had evolved into a pandora’s box of conflicts of interest between them and those who were supposed to represent them.

The main issues stemmed from the fact that rather than fighting to increase writers earnings, those earnings had simply become one component of a negotiable ‘package’ (along with the other individual components directors, actors, and so on) to be sold to studios. Indeed, it may even have been in the interest of the agency to reduce writers rates in order to get the overall ‘package’ sold.

The process “has been prevalent for a number of years in Europe,” says Hannah Ladd, dramatic rights agent at the Madeleine Milburn Agency, “and it is likely to become more so as there are more TV production companies and drama series than ever vying for funding and distribution slots.”

Evolving agency involvement

A recent example is *The Pursuit Of Love*, an adaptation of Nancy Mitford’s novel for the BBC that was written and directed by Emily Mortimer. She also stars in the series, alongside Lily James, Dominic West and Freddie Fox, all of whom are represented by the agency Tavistock Wood.

In France, the packaging trend is also emerging although at a more nascent stage. “It is true that agencies are starting to be a bit more upstream regarding packaging,” says Olivier Bibas, who is currently shooting *Django* for Canal+ and Sky Studios. “But this is a very slow trend,” he says. Another recent example however, *Infinity*, also for Canal+, is directed by Thierry Poiraud and written by Stéphane Pannetier, both of whom are with the agency, Quelle Belle Histoire.

While the practice can make for efficiencies, some argue that packaging can have a detrimental impact

The Pursuit Of Love was written and directed by lead actor Emily Mortimer, who is represented by the same agency as several of the show’s other main stars

on the industry. “A recent large concentration of ‘bankable’ talents in the hands of a few agents can lead to abuse of a dominant position,” says Sandra Ouasiss, executive producer at Elephant, talking from France’s Series Mania festival in September.

She says she has observed that “these agents have the power to impose castings on producers as well as high salaries, preventing sometimes the emergence of new talents and smaller competitors. The scarcity of bankable talents (authors, directors, actors) faced with a great demand for content will further increase the power of agents and their demand for remuneration.”

In America, the stakes are higher as the larger agencies have become more involved not only with the initial ‘packaging’ of projects for studios, but increasingly with content production, financing and distribution. In the UK, larger agencies now also represent above and below the line talent, while also developing and producing content in house or with partner outfits.

Subtleties & sensitivities

The matter is certainly a sensitive one. The big agencies not normally known for their reticence were noticeably reluctant to come forward to discuss the matter for this article.

However, many of the most contentious issues are unique to America. Particularly, the practice of waiving traditional commission fees in exchange for a ‘packaging’ fee.

In this situation, the studio pays the agent directly rather than seeking a commission on behalf of their client. Agencies’ are also paid out of a show’s overall budget and profits. Normally agencies also get a better cut of the ‘back end’ profit than creators do. But as Ladd notes, “agencies in the US have been forced to divest stakes in their production outfits.”

“There are no such things as packaging fees in France,” adds Bibas. “Things are still very artisanal for now.” Yet the lines between agent, producer, distributor and studio are becoming increasingly blurred and the issue is of growing concern.

“In France we consider it up to the producer (who pays for the development) to put together the artistic team, according to his choices and those of the director and/or showrunner,” says Ouasiss, who was showcasing *Rebecca* (TF1’s remake of the UK show *Marcella*) in Lille. “The French system is centered on ‘le droit d’auteur’, inherited from ‘la nouvelle vague’ period when feature film directors used to write and direct their own movies.”

Berlin-based Donna Sharpe, the co-writer of *West Of Liberty* for ZDF in Germany and Sweden’s SVT, and Viaplay’s upcoming *TROM* (Viaplay/ ZDF-Arte), also points to a situation where the writers position has

“How do you make a show stand out? Recognisable IP, directors and screenwriters with recent and notable track records, and name casting that moves the needle”

Mark Lorber,
Lionsgate



actually been strengthened in Germany. Outlets have come to recognise that content that stands out from the crowd can only be achieved with a good writer at the heart of the process.

“It has become not uncommon to directly deal with the channel or streamer before producers become involved,” she says, “then a suitable or ‘preferred’ producer is invited on board. Something like that would never have happened five years ago.”

This highlights how global markets are less homogenous than they may at first appear. The question is most pronounced for shows that have large international audiences in their scope. For producers making such shows, “you’re probably trying to package elements to make it more attractive” says Marc Lober, SVP of international co-productions & acquisitions at Lionsgate.

These tend to be made exclusively in English or made with a majority in the English language. “They are not just being made by the English speaking countries, but also Israel, France, Germany and so on. How do you make that stand out?” asks Lorber.

“Recognisable IP, directors and screenwriters with recent and notable track records, and name casting that moves the needles. Elements that make a broadcaster or platform say, ‘We gotta take a look at that.’”



Rebecca exec producer Sandra Ouasiss warns that packaging can lead to the abuse of talent dominance

In this sense, the concept of ‘packaging’ is simply a response to the current circumstances of the market and the need for companies risking millions of dollars per episode to feel at least some degree of reassurance about their investment.

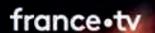
Packaging is one component, along with many ranging from finance to distribution, all of which need to be in place in order to get a show made. The issue, however, is the shift in power and the demand for talent. As one deflated exec summed up to TBI: “They all seem to want Nicole Kidman,” he says. **TBI**

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Striding out amidst the epic fantasy boom

With a slew of new epic fantasy shows on the horizon, *Britannia* exec James Richardson tells TBI's Mark Layton how his series has carved its own niche in the increasingly crowded genre

A high-end epic fantasy heyday may soon be upon us, with streamers and broadcasters investing heavily in the genre in the hopes of replicating HBO's *Game Of Thrones* success.

No shelf-bending fantasy book series has gone unread, it seems, in the hunt for the next global watercooler show. Netflix is currently building a franchise out of Andrzej Sapkowski's *The Witcher* series, while also acquiring the rights to both CS Lewis's *The Chronicles Of Narnia* and Brian Jacques' *Redwall* novels.

Amazon is soon to launch an adaptation of Robert Jordan's *The Wheel Of Time* series, while its show based on JRR Tolkien's *The Lord Of The Rings* looks set to become the most expensive TV production of all time.

HBO is meanwhile hoping that lightning will strike twice, beginning extensive spin-off plans for George RR Martin's *Game Of Thrones* with the upcoming *House Of The Dragon*.

Amid all this movement, Sky Original *Britannia* is hitting its stride with the third season of the epic drama, which is produced by Vertigo Films in association with Neal Street Productions, Sky Studios and MGM's cablenet Epix, having recently launched on the UK's Sky Atlantic and sibling streamer Now.

Contenders for the fantasy throne

James Richardson, Vertigo co-founder and *Britannia* co-creator and executive producer, tells TBI he sees no cause for concern in the steadily crowding market; despite these literary heavyweights stepping into the ring, there is plenty of room to go around in the epic fantasy genre.

"There's lots of opportunity; they're so popular those shows and rightly so, they're brilliantly made," says Richardson. "*The Lord Of The Rings* is a masterpiece of a book and I'm sure they'll make a

"We're creating our own little world. That's one of the greatest strengths and freedoms that we have"

James Richardson,
Vertigo Films



fantastic TV show out of it."

Still, it doesn't hurt to stand out from the crowd and Richardson's own show brings something rather different to the table than traditional swords and sorcery fare. While it certainly has its mystical elements, *Britannia* errs towards the historical – and the irreverent.

Set during the Roman invasion of Britain in the



first century AD, *Britannia* takes place at a time when the country was ruled by powerful druids and tribal warriors, and follows a young woman as she sets out to fulfil an ancient prophecy by defeating the Roman occupiers.

The series tackles weighty issues such as faith and power, but comes with a pop soundtrack and an often wildly contrasting tone, with moments of absurd

David Morrissey portrays real-life Roman general Aulus Plautius, though the show is not beholden to historical accuracy

humour punctuated by great horror and violence.

“All of those shows, as brilliant as they are – I was a huge *Game Of Thrones* fan – there’s a seriousness to them,” says Richardson, who is keen to explore the lives of characters in this historical era who “were just as much having a laugh and getting high or getting pissed or doing crazy shit as any of the people today.”

What’s more, unlike many of the weighty tomes



currently headed to the screen, *Britannia* is an original IP, rather than being based on an existing book series. Writers Jez and Tom Butterworth and Mackenzie Crook, who stars and wrote for season three, are also not beholden to historical accuracy.

“We’re creating our own little world. That’s one of the greatest strengths and freedoms that we have,” explains Richardson.

“We don’t have anything to go on; it’s a challenge because it means we have to come up with all this stuff, and that takes a lot more work than just coming off the page of a book, where someone has already done all that hard work for you.

“But it gives us great freedom, because it means we can completely go wherever we want. History is just in the background, it happens to be quite a major period of history, but it’s there and we can tap in and out of it whenever we want.”

Budgeting for the big stuff

Producing in the epic fantasy genre does not come without its challenges, of course, and maintaining the high level of production quality typically required by these shows comes with a significant price tag.

The recently launched season, for example, includes one of the biggest action sequences that the show has ever done, with a huge battle taking place around a Roman aqueduct.

“I think this specific type of show is always challenging because of the scale of it,” says Richardson. “You’ve got these huge, amazing costumes and makeup and action sequences and art department and design, and all those kinds of things, so the budgets can be very challenging.”



Top: Eleanor Worthington Cox returns as reluctant hero Cait in season three, while (below) Sophie Okonedo joins the cast as a newcomer with shocking appetites

Richardson notes, however, that Vertigo has been “very lucky” with its international production partners, with Sky helping to finance the show through all three seasons and US-based Epix coming on board the production in season two. *Britannia* had originally been co-produced with Amazon Prime Video for its first season.

“If you’re making a show at scale, they’re incredibly important to help finance it and they will help with the fans in those territories,” says the exec. “With a show like this, which is global, you very much want those kinds of partners.”

Miracles and taboo topics

Like most scripted productions, *Britannia* had its share of set-backs due to the pandemic, necessitating a drop from 10 planned episodes to eight for the season, which Richardson says was “a good call” given the circumstances.

With filming halted in March 2020 and unable to resume until September, the exec says his proudest accomplishment on season three was simply ensuring that it was completed.

“From a production point of view, it was the most challenging thing any of us had ever done,” the Vertigo exec says. “The producer and the production team and the cast and crew just worked miracles pulling this together.”

Still, the delays did not dull ambitions for the season. Aside from the aforementioned aqueduct sequence, Richardson says the latest instalment features some of the “craziest” and “funniest things I think we’ve ever done.”

Returning regulars including David Morrissey, Eleanor Worthington Cox, Mackenzie Crook and Zoe Wanamaker are joined this season by new cast addition, Sophie Okonedo, who arrives on the scene with some shocking appetites.

Despite the show’s penchant for pushing taboos though, Richardson says: “We think it is incredibly important to be surprising and to have all those twists, but we also think it is incredibly important not to be gratuitous.”

One particularly horrific act, carried out by Okonedo’s character at the start of season three, for instance, becomes the driving motivator for one of the regulars throughout the season.

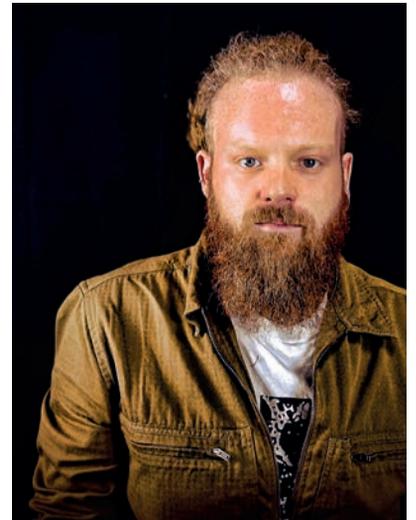
“It’s not just something that happens and we forget about it, it means something,” Richardson says.

That said, Richardson promises with a chuckle that fans of the show are going to be “completely shocked” by the end of this latest run. **TBI**



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Script to Screen: *Germinal*

Émile Zola's 19th-century novel *Germinal* is a French classic that required dextrous handling to make it to screen. Richard Middleton talks to Banijay's Frederic Balmay about its journey

Set in the barren, coal-strewn landscape of 1860s northern France, Émile Zola's seminal novel *Germinal* is a clear reflection of a country at a certain point in its history. Yet the novel's power really lies in its ability to transcend time and, for that reason, it has become a French classic, a necessary read for school children and a readily known tale across the country.

All of which makes a TV adaptation that little bit more fraught, with viewers already holding an affinity for key characters and the storyline. It also had some form to maintain; the novel has been adapted throughout the past century and its last incarnation appeared on the big screen with a big budget in 1993, with Claude Berri directing, and Gérard Depardieu and Miou-Miou starring.

Scene One

Such history did not hold back the producers, however, who were keen to create a nuanced adaptation that reflected themes of social injustice within a more modern framework. Indeed, as the show was getting off the ground in 2018, the *gilets jaunes* protests began in France, highlighting the economic inequality that continues to impact large swathes of the working population.

"It is a universal story that's still relevant, not just in France but elsewhere too," says Frederic Balmay, COO at producer Banijay Studios France. "The challenge was to make the novel a bit more contemporary than it was. We worked with young talents, directors and writers and they gave us their more modern view."





Underlining this was the snagging of David Hourrègue as director, the man behind the French adaptation of youth-skewing drama *Skam*, while Julien Lilti was attached as creator and writer. France's Pictanovo is also attached as co-producer.

"The director was inspired by shows like *Peaky Blinders* and modern westerns, and he wanted to create a more modern feel with more characters," adds Balmory, who says that the series has also given priority to female characters – "we really pushed that in our adaptation."

Scene Two

The story itself is a fascinating, sad but engaging tale that tracks a miners' strike during the latter half of the 19th century. Written in 1885, Zola researched the novel exhaustively and the resultant story provides characters that inspire and anger.

At the centre is young miner Étienne Lantier, played by Louis Peres, who flees Lille after assaulting a superior and finds refuge in the coal mining town of Montsou. Once there, he befriends veteran miner Maheu, who secures him a job pushing carts down the pit and offers him a place to stay.

But the conditions are harsh and unfair, prompting the young miner to take a stand in the form of a strike that strains the sinews of the community. At the same time, Lantier falls for Maheu's daughter, providing another storyline strand to explore.

"We also added a few new characters to give a bit more rhythm to the series, including more female and more diverse characters, and we worked on the music and how we shot it," says Balmory. "We wanted to have that western feel, we wanted it to feel grey and dirty, because it was."

With scripts largely complete, the show was preparing to shoot when the first lockdown hit last

year. Like almost all drama production worldwide, the pandemic caused a hiatus and once crews and cast were allowed back on set, the budget had increased. "We shot from October 2020 to February 2021, and we also had some Covid cases during that period so we had to work around it," says Balmory.

Canteens were closed and bubbles created, he adds, with teams having to go directly to their hotel rooms after wrapping for the day and being served meals in their rooms. While the impact is not seen on screen, there was an inevitable - and considerable - strain on cast and crew.

Scene Three

The result, however, is a show with grit and depth. It is already available on French streamer Salto – the joint venture between TF1, M6 and France Télévisions – while a debut on the latter's linear service and Rai in Italy are also in the works.

And the input of younger writers, a focus on developing the story for contemporary audiences and storylines that global viewers can empathise with has created a six-parter that has more of an international outlook than previous incarnations of the novel.



Louis Peres plays novel protagonist Étienne Lantier (above), while new characters were added to provide more diversity

For those reasons, Balmory is confident that the adaptation will travel via Banijay Rights, helped by the fact that the novel has been published in more than 100 countries. Public broadcasters will be the natural home, he says, with the first international sale being to French-Canadian network Radio-Canada.

"Our challenge was to not distort a well-known epic," Balmory says, "but also to modernise it and attract younger audiences." The series, whose budget topped €12m (\$14m), remains a "French show, for sure" the Banijay exec says, but "there is an echo of the story everywhere." **TBI**

Scripted Hot Picks

The very best scripted shows heading to market

Pushers

Producer: Yoav Gross Productions, Yes TV

Distributor: Yes Studios

Broadcaster: Yes TV (Israel)

Logline: Raw coming of age story about underprivileged teens from a neglected neighborhood, who decide to make money the only way they know how – by selling drugs

This 8 x 40-minute Hebrew-language action-drama was created and written by Guy Balila and Elad Biton, with a second season already commissioned following a critically acclaimed debut in its native Israel.

The series follows a group of teenagers from the Bnei Or neighborhood in the remote desert city of Be'er Sheva, who set out to make ends meet by selling drugs – each for their own reasons.

Chief among them are Eli, a charismatic and intelligent teen, who wants to admit his father into a rehab center in a final attempt to help him quit the drugs that broke down their family, and Johnny, a local kid, who's just been released from the juvenile center.

Johnny brings with him a bag of stolen marijuana and the connections to the right people who can help them get more. While the business soon turns into a success, trouble follows from local gangs who want to take over – as well as the police who are on their trail.

Meanwhile, the young drug dealers must learn to deal with the consequences of their actions as they attempt to turn their lives around.

“Despite growing up in the same neighborhood, Eli and Johnny greatly differ; Eli is smart, hard-working and has a strong set of morals, while Johnny has already spent the majority of his young life on the wrong side of the law,” says Yes Studio MD Danna Stern.

“Eli seems to have what it takes to rise above his harsh surroundings but is bogged down by his destructive relationship with his father – a drug addict who is in and out of rehab. Johnny and Eli meet and bond over their common need for fast cash – each for an entire different set of reasons.”

Stern reveals that the series, which is inspired by real events, explores “the importance friendship, family and the unbreakable bonds which one forges in youth,” while also being “fast paced and action-filled.”

The cast is also made up of young actors in their first roles, which Stern says contributes to the show's notable authenticity and accessibility.

“The series is high on adrenaline, full of twists, turn and cliff-hangers,” she adds. “We grow to care and identify with our ‘anti-heroes’ and get hooked on the action; perfect for binge viewing.”





The Newsreader

Producer: Werner Film Productions

Distributor: Entertainment One

Broadcaster: ABC (Australia)

Logline: Drama diving behind the headlines of the most iconic stories of our time through the lens of a television newsroom team

Anna Torv (*Fringe*, *Mindhunter*) and Sam Reid (*Anonymous*, *Belle*) head the cast of this 6 x 60-minute drama set in a commercial television newsroom in 1986, which follows a tumultuous three months in world history through the eyes of a young reporter and a notoriously ‘difficult’ newsreader.

From the shock of the Challenger explosion, to the hype of Halley’s Comet, and the complexities of the AIDS crisis, the two journalists form a deep bond – after an initially hostile start – as they attempt to cover the headlines in a world on the cusp of change.

“This fiery drama is layered with wit, nostalgia and warmth featuring nuanced

characters that are beautifully written,” Noel Hedges, EVP of

acquisitions at Entertainment One, tells TBI. “Delivering brilliant performances by Anna Torv and Sam Reid, *The Newsreader* hits on many universal themes from romance to office politics.”

The series also works hard to capture the feel of the period,

Hedges explains. “From the costumes and lighting to the iconic news stories that have defined our time like The Challenger explosion, Chernobyl and the AIDS crisis, *The Newsreader* expertly captures a high-octane TV newsroom set in the 1980s.”



Children Ruin Everything

Producer: New Metric Media, in association with CTV

Distributors: New Metric Media, Bell Media

Broadcaster: CTV (Canada)

Logline: Comedy about living with the worst roommates of all – young children – through the eyes of parents who struggle to find a balance between being ‘Mom and Dad’ and being who they were before

Created and exec produced by Kurt Smeaton (*Schitt’s Creek*, *Kim’s Convenience*), this 8 x 30-minute comedy series follows Astrid and James, parents who are struggling with being ‘Mom and Dad’ while also holding onto their own pre-offspring identities.

“Astrid and James struggle to find their old, pre-kid selves while at the same time deliberating whether to have a third child,” reveals New

Metric Media president, Mark Montefiore. “They can’t have a civilised meal, a decent workout, or even enjoy an intimate moment together without the kids interfering.”

It’s a situation with which parents can easily identify, adding to the show’s global appeal and, as Montefiore adds, the show is ultimately about family, love, parenting and the ability to adapt to change.

“It’s universal in its themes as

everyone in the world, parent or not, is having to learn to adapt to a new life in one way or another,” he says. “Plus,

regardless of culture or language, parents used to have a life before kids that some part of them desperately tries to hold onto.”





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Ever After

Producer: Indigo Films, Rai Fiction

Distributor: About Premium Content

Broadcaster: Rai Uno (Italy)

Logline: Drama series following the collapse of a marriage at different points in the relationship, as a couple battle one another for custody of their son

This 6 x 52-minute Italian-language drama tells the intimate story of Anna and Enrico – a couple who, after their happy wedding 11 years ago, now find themselves in a bitter custody battle for their young son Pietro. Over the course of the series, the show dissects their relationship with a back and forth between past and present to uncover what made their love story fall apart.

Offering some insight into the friction between the two once-happy protagonists, Emmanuelle Guilbart joint-CEO and co-founder at APC, says: “Anna and Enrico are a young couple when Anna gets pregnant and they decide to get married and move in together.

“They have different social backgrounds, which eventually

leads them to want different things in life. Anna wants to stay in her flat in Rome when Enrico would like to move to a house in the countryside closer to his parents; she wants to continue her studies, he wants their son to play soccer... very common situations that can, little by little, pulls them apart.”

Guilbart says what makes this show stand out is that it follows two people dealing with “down-to-earth issues”, while delivering plenty of drama.

“*Ever After* is a unique series, it differs from what we are used to seeing; it is not a crime series nor a thriller. It’s a story about love that dissects with a lot of finesse and authenticity what makes two people fall in love, and how a marriage can gradually fall apart.”



Conviction: The Case Of Stephen Lawrence

Producer: Hat Trick Mercurio Television, in association with Baby Cow Productions

Distributor: Hat Trick International

Broadcaster: ITV 1 (UK)

Logline: Fact-based drama about the cold case investigation into a racist murder that forced deep questioning of the UK police and legal system

The 1993 murder of Black British teenager Stephen Lawrence in a racist attack was a shocking crime with reverberations still being felt in the country today.

This 3 x 60-minute event drama tells the true story of a fight for justice and the eventual conviction of two of the suspects in the crime in a case that also exposed institutional racism within the British police force.

“The murder at the centre of the story happened in 1993, but our drama opens in 2006 when a detective comes across the files relating to the case gathering dust in a closed down police station,” reveals Sarah Tong, director of sales at Hat Trick International.

“It’s not a whodunnit – everyone knows who dunnit. The scandal is that the original investigation was incompetent and institutionally racist

and no one was brought to justice. The case has been gathering dust for years and the challenge is to put together a cold case long after the event in the teeth of opposition and mistrust,” she says.

Tong adds that by focusing the drama on the follow-up investigation, which took place more than a decade after the murder, the series “explores a very current and important global social and political theme.”

At the heart of the story are the parents of the murder victim, Neville and Doreen Lawrence, as well as Inspector Clive Driscoll, the detective who led the investigation, and the relationship they formed.

“It’s both an intense, disturbing and compelling real-life police procedural, but also a moving, and inspiring story of unlikely friendships,” reveals Tong.

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Unmasking AVOD's format potential

Could AVOD provide a fertile new breeding ground for fresh unscripted ideas? Tim Dams finds out



Fox-owned AVOD Tubi streams shows such as *The Masked Singer* and has plans to create original programming



Slowly but surely, free AVOD platforms are beginning to follow in the footsteps of their SVOD cousins and commission fresh, original content.

In a bid to differentiate themselves and to grow their services, several AVODs have already announced plans to greenlight their own projects.

Earlier this year, Roku purchased more than 75 shows that Quibi had created for its now defunct service, dubbing them Roku Originals, and the AVOD has followed that up by starting to commission its own series.

In June, it ordered a second season of the Roku original series *Die Hart* after the former Quibi series starring Kevin Hart had the largest opening weekend in the history of the Roku Channel. In September, it ordered its first feature-length film, *Zoey's Extraordinary Christmas*, and the company is also bringing *Eye Candy*, a “sweet, new competition series” based on Nippon TV’s gameshow format, *Sokkuri Sweets*, to fast-growing service The Roku Channel.

Amazon-owned free streaming service IMDb TV, meanwhile, has also been steadily ramping up its own slate of originals. On 1 November, former *Judge Judy* star Judy Sheindlin debuts her new show *Judy Justice* on the service. The first season is set to run for 120 episodes. The service’s other unscripted originals include a new home design series with *Flipping Out’s* Jeff Lewis.

Earlier this year, Tubi, Fox’s free, ad-supported streaming service, announced it too would enter the original programming arena this autumn. The company already offers shows such as *MasterChef USA* and *The Masked Singer* via the service, and Fox said its originals would feature 140 hours of animation, documentaries and shows across multiple genres, with details to follow.

The world’s largest AVOD platform, YouTube, also continues to order original unscripted content from producers. In the UK, indies such as Studio Silverback, Thames, HiddenLight and Century Films have recently picked up commissions from the internet giant. Thames, for example, produced *Hello 2021: UK*, a New Year’s Eve special for YouTube featuring stars such as Big Narstie, Katherine Ryan and Dua Lipa.

Elsewhere, ad-funded platforms such as Snapchat and Facebook are pressing on with their originals strategy. Snap Originals, for example, include Bunim Murray’s *Endless* and *Twinning Out*. Bunim Murray has also made *Ball In The Family* and *The Real World* for Facebook.

Broadcaster-owned ad funded streamers are also

starting to commission originals for their platforms. Carolyn McCall, CEO of ITV, said last year that the UK broadcaster will commission directly for its ad-supported streamer ITV Hub and Channel 4 said this summer that it is planning to launch a new international AVOD streaming service.

Hybrid AVOD / SVODs – such as NBC Universal-owned Peacock – are also making a selection of their original content available to viewers on free tiers.

Can AVOD add up?

The originals strategies of so many AVOD services begs the question: could ad-funded streamers provide a fertile new breeding ground for producers’ fresh unscripted ideas?

Before answering the question, a little context. Free ad-supported streaming services are the fastest growing streaming category and AVOD revenues exceeded subscription video on demand revenues in APAC and the US in 2020, according to research by analyst group Omdia. It found that ad-funded streamers generated \$40bn, compared with \$32bn for subscription players.

India leads the world in terms of monthly active users on AVOD platforms, with more than half a billion free AVOD users. The US is second with nearly 200 million free AVOD users.

The platforms are making money, too. ViacomCBS expects its AVOD Pluto TV to reach more than \$1bn in revenue in 2022 and IMDb TV execs say their vision is to build “a modern broadcast network.”

All this suggests that competing AVOD players are only likely to invest more in content to stand out from the crowd as they look to exploit the potential of a growing market.

“I think the Roku and IMDb platforms are probably going to be the next ones to really hit in terms of buying content,” Bunim/Murray president Julie Pizzi tells TBI. “They are starting to populate their platforms with new unscripted programming.”

Her point is echoed by Mike Woodward, VP of development and production at The ATS Team. “We know most AVODs, especially Roku and IMDb TV, are building up their original content staff. Their time to become major players in this market may come a lot sooner than we expect. We absolutely get a sense they’re on the hunt for new formats that can become their flagship products.”

Insight TV director of content and channels Arun Maljaars points out that the growth of ad funded AVOD and FAST channels, like Insight TV, is being



Sokkuri Sweets (above) has been remade as *Eye Candy* for Roku, while *Twinning Out* is a Snapchat Original



driven by audience demand for free content. “Not everyone wants to pay,” he says. Insight TV’s content is 80% original versus 20% acquired. Advertisers, he says, are supportive of new content. Insight, for example, is collaborating with shoe and clothing brands for new skateboarding documentary series *A Simple Path*. There’s a strong desire among advertisers to reach audiences beyond the ad-free subscription environment, he says. “Advertising needs to invest its money somewhere,” Maljaars points out.

From smaller beginnings

As AVODs invest in content to attract advertisers and viewers, producers are likely to benefit. So it is worth building relationships up with AVODs now, say many producers.

ATS Team’s Woodward believes that AVODs may start small and option existing formats to determine what their audience likes – and that it makes sense to pitch to them while in their growth stages.

“We think AVODs will ramp up production of slightly smaller-scale original programming than what we are used to from the bigger existing SVOD players,” says Woodward.

“As SVODs have already been showing, the more non-original programming licenses they can remove, the more money they can spend on original programming that they own the rights to. They are here to test the waters – slowly and steadily. As with most things in life there is opportunity going with a David rather than a Goliath, and this is no exception.”

Getting in early with AVODs can also pay dividends in terms of extending a production company’s skills. Bunim/Murray’s Pizzi says that the shows it is making for digital platforms such as Snapchat and Facebook don’t represent a huge part of its business, the budgets are quite a bit smaller and the timelines are condensed too.

“But in terms of trying to connect with a younger audience, which we have always done as a brand, it’s really been instrumental for us to keep our finger on the pulse and really see how the future viewership is going to consume content.”

Pizzi points out that many of the younger generation prefer the likes of TikTok and YouTube to traditional broadcasters. “I think it is still in the experimental stage. I don’t know that anyone has really figured out how to amass the viewership on a regular basis of [people] that consume Tik Tok content.”

Many of the AVODs, of course, are still getting off the ground. For many of the services, it is early days, meaning that opportunities for producers to pitch in new unscripted ideas are few and far between. But while the opportunities may be limited for now, few producers expect it to remain that way in the years to come.

Not many predicted the astronomical rise of Netflix after it made its first tentative steps into commissioning original programmes, and the transformative effect it has had on production around the world.

So as the AVOD revolution gathers pace, history shows that producers would be wise to take note – and make sure they are not left behind. **TBI**

“Roku and IMDb are probably going to be the next ones to really hit in terms of buying content”

Julie Pizzi
Bunim/Murray



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Formats Hot Picks

The very best format content heading to market

Who Is The Phantom?

Producer: Constantin Entertainment

Distributor: Red Arrow Studios International

Broadcaster: ProSieben (Germany)

Logline: Celebrities attempt to guess the identity of the mystery Phantom – a famous face hidden behind a mask – in this primetime entertainment format

This spin on the popular ‘masked celebrity’ genre sees a team of three celebrities attempt to correctly guess the identity of the mystery Phantom – a famous face hidden behind a mask.

The Phantom, working with the show’s host, has prepared eight clues providing hints to their identity. But to fully receive each clue, the panel of celebrity detectives must first solve ingeniously presented riddles and quizzes.

As Tim Gerhartz, president and MD of Red Arrow Studios International, explains: “*The Phantom* presents every clue with either an entertaining studio performance or with a short cinematic clip. It’s a fun, challenging and visually interesting way of revealing intimate secrets about celebrities and combines the successful quiz and celebrity panel genres with the popular masked element in a unique and playful way.”

As the clues build, the celebrity detectives – and the audience at home – can start to guess who might be behind the mask, ahead of the big reveal.

“Casting is key,” says Gerhartz, for anyone looking to adapt the format. “A big name celebrity with an interesting

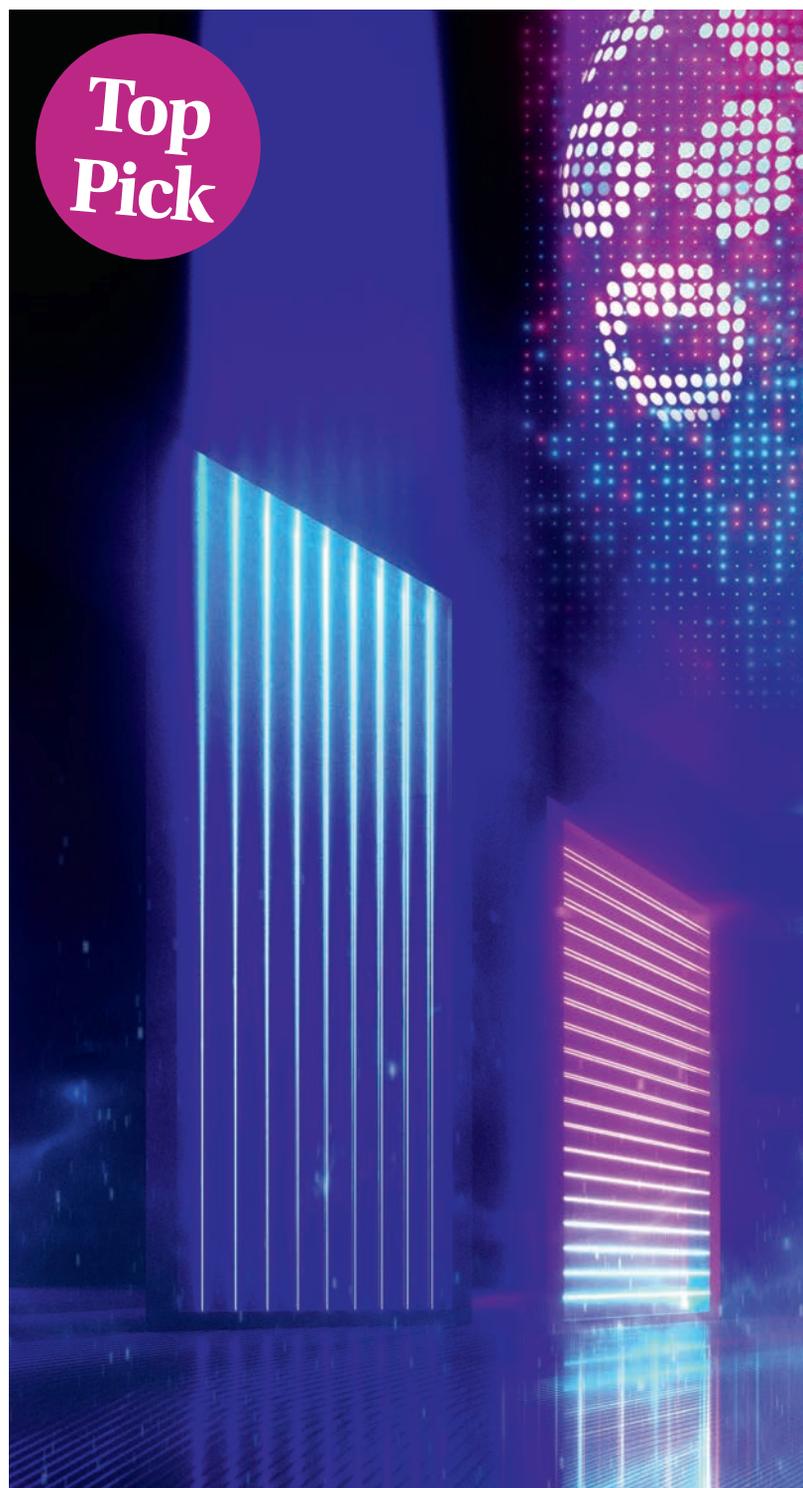
backstory and career, and a panel of well-known celebrity detectives is important.”

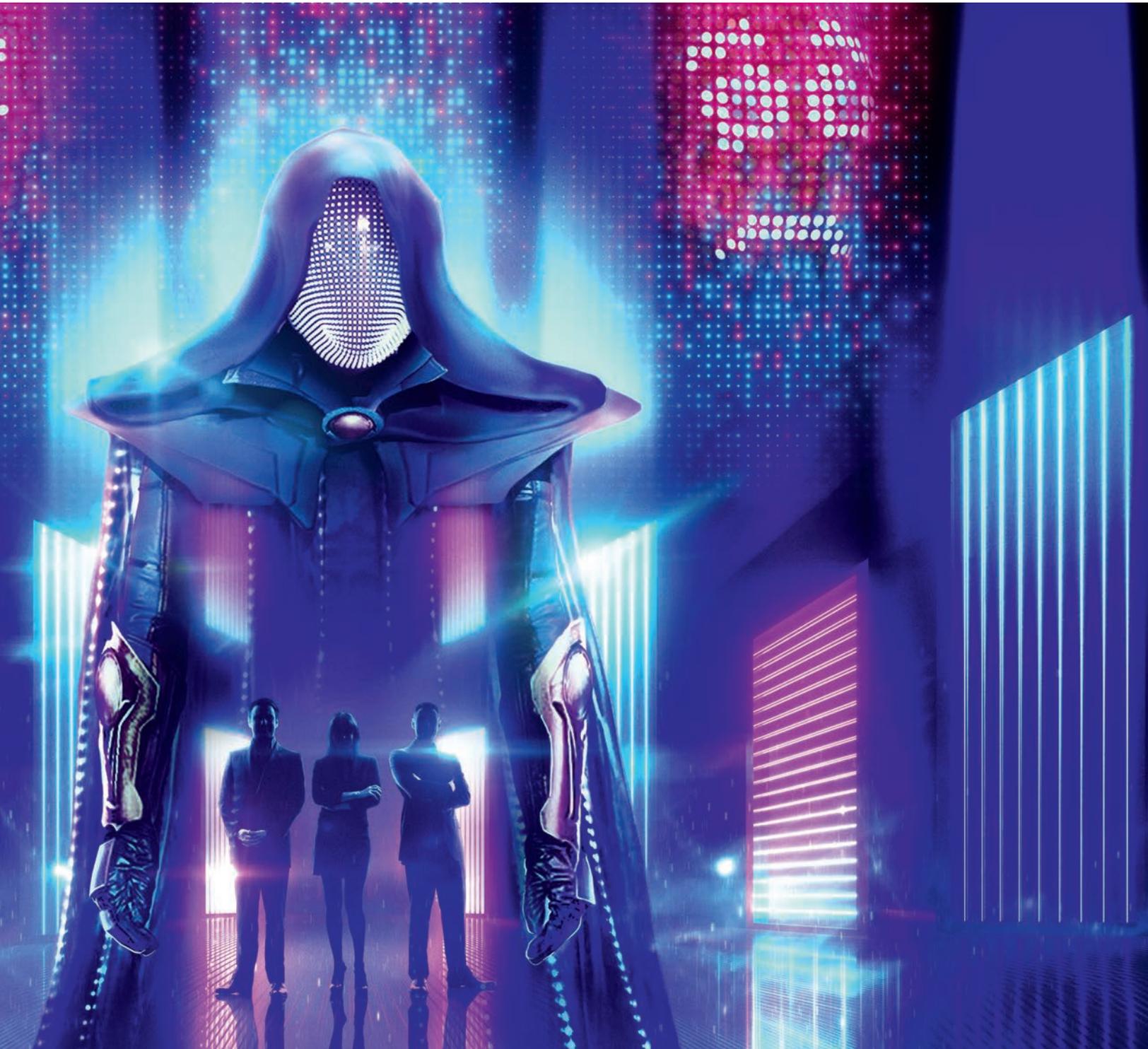
The exec adds that the format should appeal to broadcasters around the world as it is a “very flexible, scalable show” in terms of budget and also scheduling.

“It works very well as a weekly primetime event but could also be stripped across the schedule with the Phantom perhaps revealing themselves at the end of the week,” he suggests, adding: “There is also huge marketing potential for broadcasters to really tease the identity of the Phantom via trailers and press to whet viewers’ appetites.”

“The masked entertainment genre is hugely popular internationally and this is a different take on that genre that offers up huge play-along opportunity for viewers who can try to interpret the clues and solve the riddles to reveal the identity of the Phantom at the same time as the detectives,” says Gerhartz.

“The LED face mask which can convey the Phantom’s expressions and feelings in real time adds a level of charm and comedy and gives the Phantom a really unique character.”





Celebrity Flight Club

Producer: Armoza Formats

Distributor: Armoza Formats

Logline: Reality format in which two teams of famous faces head to a flight academy and battle it out to take to the skies solo

This celebrity-driven series sees 14 famous faces split into two competing teams as they go through extensive flight training in a battle to be named the top of their class and experience the thrill of a solo flight.

The stars are checked into a real flight academy where they will live together, go through aviation training and compete in various missions – both on the ground and while up in the air.

“The celebrities face a wide range of challenges during their training, with the level of difficulty of the challenges escalating as the competition progresses,” reveals Michal Itzhaki, head of content



partnerships at Israeli outfit Armoza Formats.

All of this training happens under the watchful eye of a professional aviation team, who will evaluate the celebrities progress for the weekly elimination. In the finale, the top three finalists will perform their first ever solo flight and the season winner will be crowned.

“We provide access to an all-inclusive state-of-the-art flight academy that serves as our production hub. The academy was founded by Israeli Air Force Chief, Eitan Ben Eliyahu, who also serves as a consultant,” says Itzhaki, who explains that this dedicated hub provides local producers with everything they need to make

their own version of the format.

“We love seeing our favourite stars being pushed to their limits,” he adds, “and what could be more extreme than literally taking them to the sky? This is a fresh take on reality, with high stakes and drama in a unique, never-before-seen setting,” Itzhaki says.

Domino Challenge

Producers: Endemol Shine North America, Endemol France, Endemol Shine Netherlands

Distributor: Banijay

Broadcaster: M6 (France), RTL (Netherlands)

Logline: Competition format pits domino-stacking experts against one another to see who can construct the most awe-inspiring creations

This family-friendly competition format offers a healthy dose of nostalgia as it pits the best domino duos in the country head-to-head as they attempt to build incredible creations.

Each episode sees the pairs facing a new challenge, and to avoid elimination, they must continue to up their game each week to impress the panel of expert judges.

At the end of each episode the creations will topple one by one and the couple that fails to impress judges will depart.

The series culminates in a grand finale, with the final teams competing to create two monumental builds.

James Townley, global head of content development at Banijay, says that the format delivers “wow” moments as it showcases the incredible creative skills of the contestants.

“There are also spine-tingling moments of jeopardy, knowing that one false move will bring the whole build to an end,” he adds. “We always look for diversity in casting as *Domino*

Challenge celebrates people and their expertise whilst offering the competitive edge.”

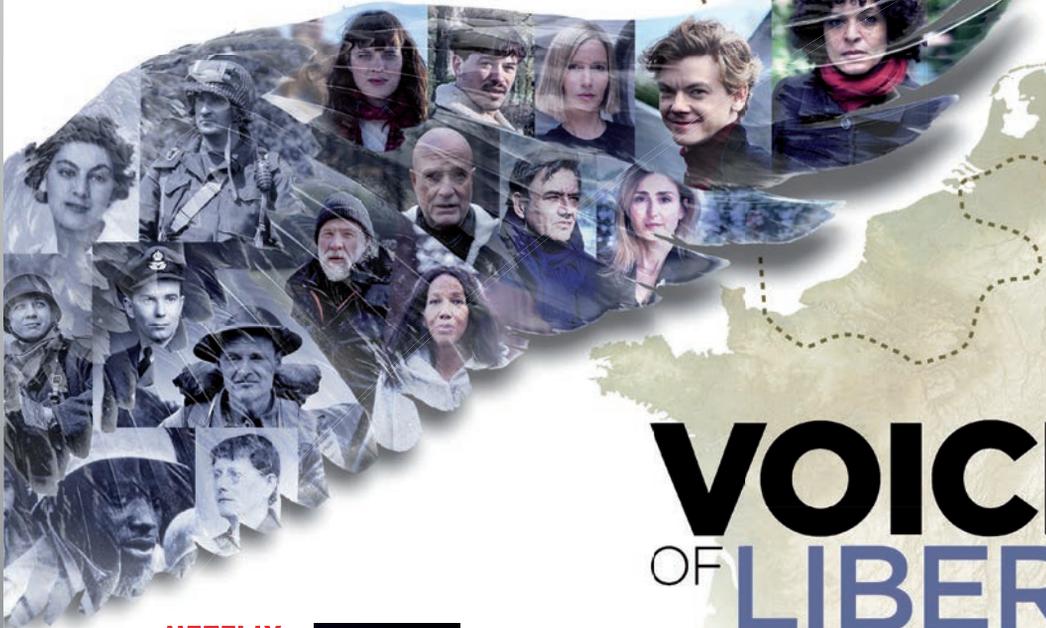
Townley also highlights that the format “lends itself very well to be scaled and suits local budgets and taste, by tweaking the themes of the creations, as well as the duration and number of episodes.”

The show premiered in France on M6 this summer and is in the process of being adapted in the Netherlands for RTL.

The original French series saw contestants assembling large-scale builds, ranging from a recreation of Ancient Rome with a massive replica of the Colosseum, to an Arctic scene full of polar bears.



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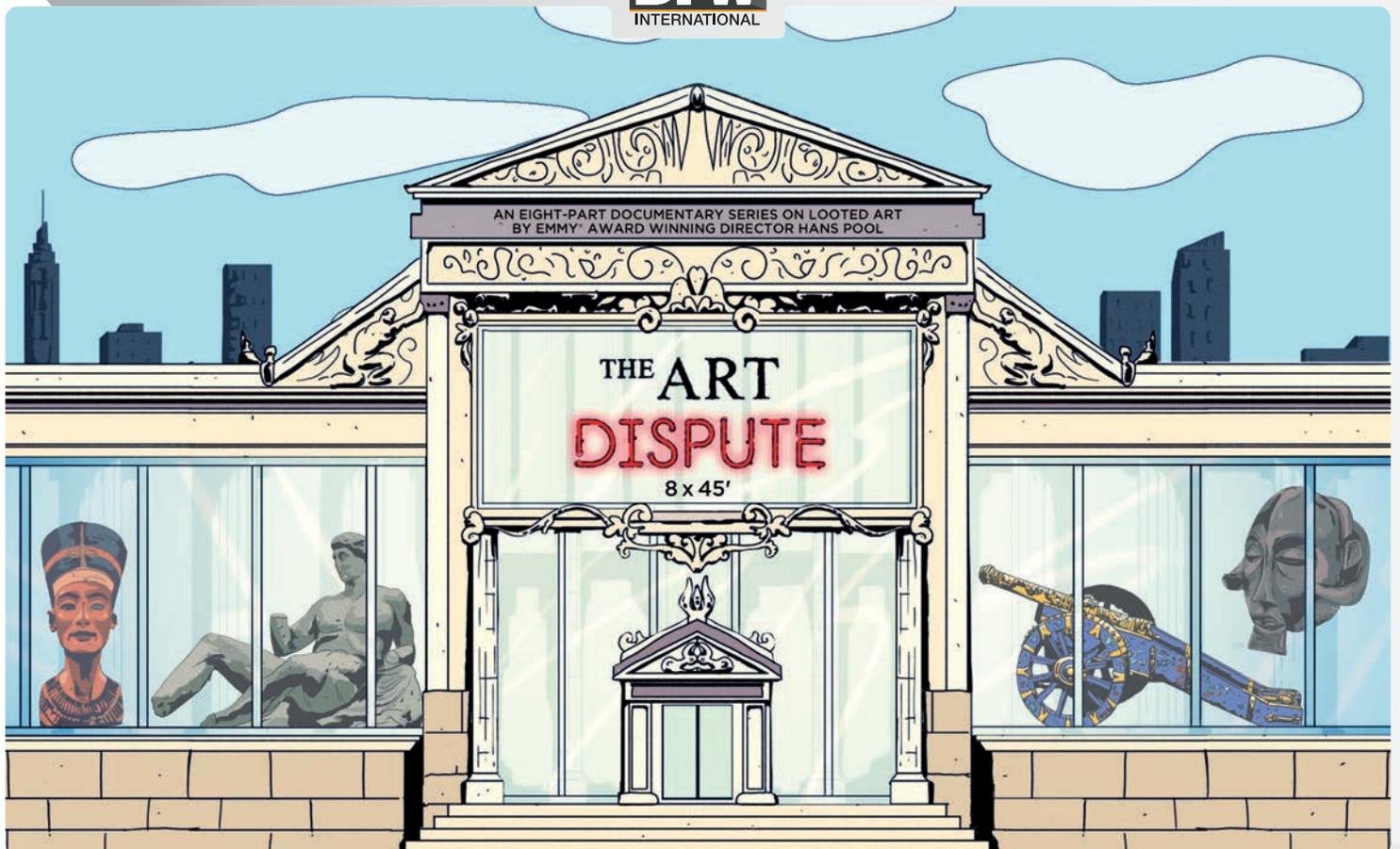
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Look Back In Laughter

Producer: Yoav Gross Productions

Distributor: Lineup Industries

Broadcaster: Kan (Israel)

Logline: Some of the funniest people in the country tell hilarious anecdotes about relatable topics

This Israeli format sees some of the nation’s best comedians taking to the small screen to explore a variety of different but widely relatable themes – be it parenthood, adolescence or money and savings.

The assembled comedians tell stories that blend nostalgia, anecdotes and sharp observational comedy, with the producer also asking questions and showing footage to give the feel of a relaxed chat rather than an interview or a standard

‘talking heads’ show.

The original 10-part series launched last year on Israeli pubcaster Kan and has been recently commissioned for a second season, which is set to air this month.

“The tagline tells it all: ‘The funniest people telling all of our stories,’” says Ed Louwse, co-founder of Lineup Industries. “The uniqueness of this format is the perfect combination between great and funny personal stories and iconic old



footage. Meshed together, they tell the hilarious and touching story of a nation, a society, a place and time, but most of all – of people’s lives.”

Louwse says there are three core ingredients for those looking to make a local adaptation: “A diverse cast

of very funny and eloquent comedians, from all genres and generations; a focus on true personal stories and experiences rather than opinions or theories; and perfectly curated footage, either funny and bizarre, or nostalgic, cherished and meaningful moments.”

Race Against The Tide

Producer: Marblemedia

Distributor: Distribution360

Broadcaster: CBC (Canada)

Logline: Contestants battle both one another and the tide in this sand-sculpting competition series

It’s a battle against nature in this new 10 x 30-minute competition series format. Debuting on Canadian pubcaster CBC, the original version sees 10 world-class sand-sculpting teams head

to the Bay of Fundy in New Brunswick to compete for the grand prize.

In each episode, they dig, pound and carve their way to extraordinary sculptures entirely

made from sand, looking to avoid elimination. But there is an extra catch – not only are they competing against each other, they are also racing against the incoming tide. The competitors have just six hours to finish their creations for the judges’ evaluation before the highest tide in the world washes them away.

Diane Rankin, SVP rights and executive producer at Distribution360, says the show

is “a fantastic mix of artistic skill with the added drama of the authentic high stakes created by Mother Nature herself.”

She also highlights how, as a format that is produced outside, the location becomes “as much of a character as the cast, which offers domestic broadcasters and platforms a truly local series that will feel very much ‘of their country’.”

Marblemedia, working closely with the Distribution360 team, has created a ‘turnkey’ format bible to guide producers through the process of choosing a location and, as Rankin notes, it requires precision. “There is a lot of science involved in choosing a site with a strong tidal range and timing your shoot,” she explains. “You also need that beach location to have the right type of sand – a key benefit of this format is its environmental friendliness. You want to use what Mother Nature has provided and let what was there wash back out to sea naturally.”





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Shining a spotlight on self-financing

Fully funding a production can be a gamble for producers and distributors, but it may sometimes be the only way to get a project with clear potential off the ground. Tim Dams finds out if the risk is worth the reward

If you look around the TV industry, it's not hard to find examples of producers and distributors self-financing factual content.

With broadcaster budgets under pressure but growing demand for high-end factual content, some say that self-financing factual content is emerging as a viable alternative to the commissioner-led approach.

Distributor Fremantle, for example, has recently fully funded a number of programmes before taking them to market, including two Jamie Oliver series – *Jamie's Quick And Easy Food* and *Jamie At Home* – as well as

high-end factual docs *Arctic Drift* and *Beate And Serge Klarsfeld: The Nazi Hunters*.

Newly launched distributor BossaNova is also planning to commission original factual content, building on the track record that founder Paul Heaney established at TCB Rights, where he funded many hours of factual.

UK producer Woodcut Media, meanwhile, recently fully funded and made the first episode of *Surviving A Serial Killer*, which was then picked up by Channel 4, which backed five more episodes.

And even if they are not fully funding projects,



distributors are often investing their own money to get factual programmes off the ground. DCD Rights put finance together for *Disasters Engineered* for London and LA-based producer SWR Media, bringing in pre-sales from Discovery UK for season one and investing against remaining territory sales.

German content agency Quintus Studios, meanwhile, has started funding factual programmes from indies, offsetting the risk by playing them on its own YouTube platforms such as Free Documentary – which has three million subscribers – as well as selling them to international TV buyers.

Risk & red flags

Not all think that self-funding is a good idea though, and many warn that creating content with no home is an incredibly risky business – and something to be avoided in most cases.

“You have to be very targeted and focused on the project and be really involved – you can go awfully wrong otherwise”

Jens Richter,
Fremantle International



Arctic Drift was backed by Fremantle partly because of the time constraints of going to market

Flame Distribution, for example, has worked on several programmes over the years where the producers have decided to fully fund their own productions. It's usually because they feel so strongly about the subject of their documentary and they've been unable to get a commission or other funding, explains Flame's content sales and acquisitions director Fiona Gilroy.

“Sometimes they are proven right and on completion their production gets acquired. However, more often than not, that doesn't end up being the case,” she explains.

Gilroy says it's now a “bit of a red flag” if a producer comes with content that has no broadcaster or platform attached. Often it just doesn't quite hit the editorial sweet spot of buyers, no matter how well made it might be.

“We have found that self-funded content tends to underperform compared to content that is commissioned or pre-sold. The value of external editorial input and guidance from the editorial team at a channel or streamer simply can't be underestimated.”

And, to be fair, those who are funding their own content would agree that it is a risky endeavour.

Winning a £1m gamble

Fremantle International CEO Jens Richter says self-funding works in the right circumstances, but that it will never be a “mass model for production.” He adds: “You have to be very targeted and focused on the project, and be really involved. You can go awfully wrong otherwise.”

Fremantle fully funded two Jamie Oliver series, he says, because of the quality of the shows and the chef's clear brand. It had also worked with Oliver for 20 years, so had a good idea which international broadcasters would take the shows. As such, the risks of investing were clearly well balanced against the potential rewards.

On the surface, FremantleMedia's reason for investing in *Arctic Drift* seems less clear cut. Produced by Wild Blue Media, the high-end documentary follows an international team of scientists on a pioneering \$150m climate change research expedition to the Arctic, one of the most hostile and least studied environments on Earth.

Richter says the reasons for investing over £1m (\$1.38m) in the production were unique: an icebreaker with 200 scientists on it was travelling to the North Pole for 12 months and only one camera team was allowed on board. “We didn't have time to go to market, because the boat was about to take off.”

The access to a unique expedition convinced Fremantle to invest. So too did the opportunity to make a ‘once in a lifetime’ film about climate change that’s also an adventure story.

Fremantle’s investment looks to have paid off: it has since sold to 170 territories and will premiere around the time of global climate summit COP26. Fremantle has created an international movie of *Arctic Drift*, and also bespoke versions for PBS, Channel 4 and France TV, focusing on US, UK and French scientists respectively.

Richter cautions that such projects require the investment of time as well as capital. In the absence of a channel’s commissioning editor, the distributor needs to step in to help shape the project in dialogue with the producer. “If a rough cut or dailies come in, we need to look at them and to comment on them.”

Archive add-ons

Another bet to pay off was producer Woodcut Media’s investment in true crime series *Surviving A Serial Killer*, a six-parter delving into the personal stories of people who have survived a face-to-face meeting with a murderer and lived to tell the tale.

Woodcut CEO Kate Beal says the project came about as a result of the pandemic. With production halted, Woodcut – a specialist true crime producer – started brainstorming ideas that it could make out of its archive.

Co-founder and experienced editor Matt Blyth delved into its archive to create a taster episode of *Surviving A Serial Killer* from rushes that hadn’t been used in other programmes, and also by working with

“Self-funded content tends to underperform compared to content that is commissioned or pre-sold”

Fiona Gilroy,
Flame Distribution



Surviving A Serial Killer was put together by Woodcut Media from unused rushes and archive material – and sold in several key territories

archive companies such as Getty.

“We then took it to a number of UK broadcasters and said this is how much we need to get episodes two to six made,” recalls Beal. C4 bought in, and the series has since sold to key territories such as France, Germany, the US and Australia. “We got lucky – we more than made our money back.”

Beal says funding the doc was not a strategic decision, so much as one made out of necessity; the indie wanted to keep its team together and working during the pandemic.

Woodcut has since made another pilot episode for a show, but in a genre that it is not so well known for. Beal wants to use it as a calling card, to show broadcasters what it is capable of and hopefully win business in a new genre.

Despite the success of *Surviving A Serial Killer*, Beal can’t see distributors or indies self-funding very often. “It is just too much of a risk,” she says.

She also thinks that the ability of indies to self-fund has lessened during the pandemic. “A lot of people who would have self-funded a couple of years ago are running out of cash because of Covid. Indies have been using their reserves to get through the last 18 months. Any fat they had is gone.”

German content agency Quintus is taking a different approach. From its roots as a distributor specialising in helping to finance and sell documentaries, the company has diversified to become a channel operator, building up a number of successful documentary channels on YouTube such as Free Documentary.

With the channels starting to make money, MD Gerrit Kemming says Quintus is now helping to fund five original series from a number of producers. But it always looks to develop content that has a high sales potential on the international TV market too, as not all programmes can make their money back from YouTube revenues.

Helpfully, viewing data from the YouTube channel helps Quintus know what audiences are responding to – and what kinds of programmes are worth risking money on. The company combines this with its knowledge of the international TV marketplace to help inform funding decisions.

For Kemming, self-funding factual programming is a risk that he believes more companies will take in years to come. “The decision making process from potential commissioners or broadcasters is taking so long. If you wait to be covered for 100% of your budget, you are not able to produce at the same output level that you were able to a couple of years ago,” he explains. “If you want to grow, you need to find other ways.” **TBI**



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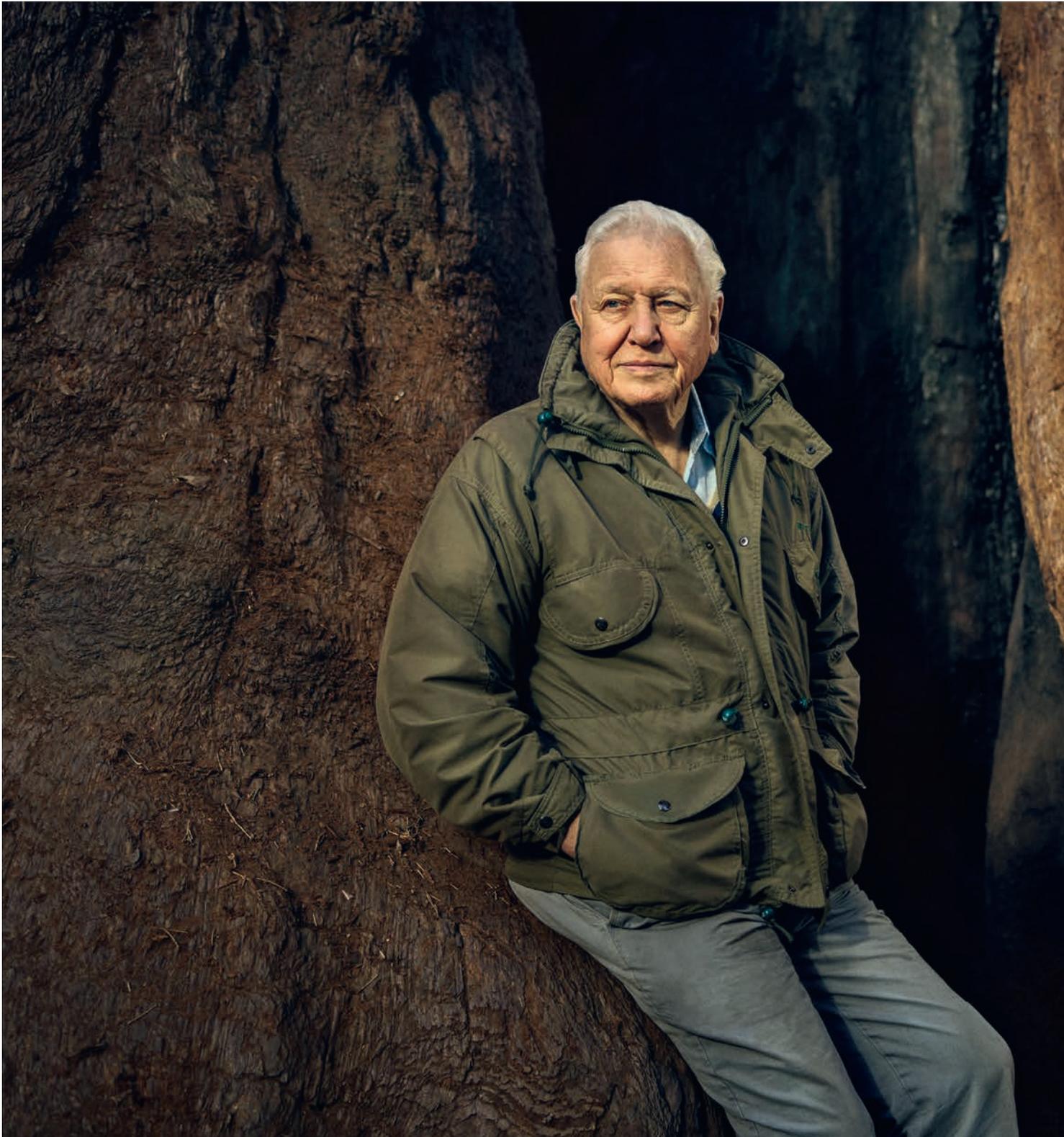
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Factual Hot Picks

Our selection of the top factual shows heading to market





Top
Pick

Green Planet

Producer: BBC Studios Natural History Unit

Distributor: BBC Studios

Broadcaster: BBC One (UK), PBS (US), ZDF (Germany), Bilibili (China), CCTV9 (China), France Télévisions

Logline: Sir David Attenborough travels the globe, employing technological breakthroughs to delve deep into the complex lives of our world's plant life

Natural history legend Sir David Attenborough is back on screens with this latest ambitious and high-end series as he guides viewers through an exploration of our planet from the perspective of its plant life.

Travelling to the US, Costa Rica, Croatia and northern Europe, his globe-trotting journey will take in environments from deserts and mountains to rainforests and the frozen north, as he reveals how all animal life, ourselves included, is totally dependent on plants.

Rupert Barrington, series producer on the 5 x 60-minute production, reveals that the programme offers more than its fair share of surprising revelations about the natural world – none more so than that plants live much richer and more complex lives than most of us might expect.

“Plants don’t act alone, they forge intimate relationships, as friends and enemies, with other plants, animals and even with humans,” he tells TBI. “They trick, deceive and use animals for their own ends. Contrary to how it may appear, when plants and animals interact, the plant is usually in charge.”

This new series also acts as something of a follow-up to Attenborough’s 1995 BBC series *The Private Life*

Of Plants, making use of technological advances and over two decades of new discoveries to dig even deeper into this hidden world.

“Twenty six years after *The Private Life Of Plants* aired on BBC One, we see not only how science and technologies have advanced, but also our understanding of how plants behave and interact has evolved,” says Barrington.

“New motion-control robotics systems allow us to take a magical journey into the world of plants, in real time and in time-lapse, to watch their lives on their timescale and from their perspective,” he explains.

“Thermal cameras, macro frame-stacking to give incredible depth-of-field, ultra-high-speed cameras and the latest developments in microscopy all allow us to reveal a fresh view of the lives of plants and their incredible beauty.”

The series is also a great passion project for veteran show host Attenborough, reveals Barrington, with the show debuting at what the exec describes as a “critical time for our green world” as ecological threats have brought nature to “the brink of collapse.”

“It is therefore vital that we begin to understand and appreciate that part it plays in our world’s existence.”

Osprey: Sea Raptor

Producers: Love Nature, The WNET Group, CosmoVision

Distributor: Blue Ant International

Broadcaster: Love Nature (World), Sky Nature (UK), PBS Nature (US)

Logline: Up close and personal look into the lives of a pair of osprey as they raise their young

Game Of Thrones actor Sean Bean brings star power as he narrates this 1 x 60-minute blue chip documentary, delving into the story of a pair of Osprey as they reunite, having travelled separately across continents to raise their young in a Connecticut saltmarsh.

“Natural history fans will love the up close and intimate access to the Osprey pair, shot in stunning 4K,” says Solange Attwood, EVP at Blue Ant International. “Additionally, the compelling story of how the male and female Osprey bond

and raise their young is a great co-viewing opportunity for parents seeking programming to watch with their children.”

The series follows the reunited pair as they mate and brood their eggs, while foxes, deer and scores of migrating shorebirds bring hustle and bustle back to the saltmarsh. Over the course of one summer, the two birds fend off enemies, catch hundreds of fish and raise their tiny chicks to become the next generation of sea raptors.

“This series showcases the extraordinary relationship and



characteristics of the osprey and the surrounding wildlife, which will bring audiences closer to nature and expand their knowledge of this fascinating ecosystem,” says Attwood.

The series offers some “remarkable visuals” adds the exec, with the documentary

offering intimate shots of the birds in their nest as they nurture their young.

“The innovative close-up access of the nest that the filmmaker was able to capture offers viewers a fresh perspective on this formidable and often overlooked species,” she says.

A Girl's Guide To Hunting, Fishing And Wild Cooking

Producers: Southern Pictures, Broken Yellow

Distributor: Flame Distribution

Broadcaster: SBS (Australia)

Logline: Acclaimed chef Analiese Gregory spends a year living off the land and learning to survive in the wilds of Australia

Celebrity chef, hunter and forager Analiese Gregory – author of cookery book *How Wild Things Are* – has achieved fame for her culinary skills, but after years of building a stellar career in some of the world's most famous Michelin-starred restaurants, she feels somewhat burnt out, disconnected and unfulfilled.

Putting the familiar behind her, Gregory swaps it all for a small cottage in Tasmania's remote Huon Valley, where she spends a year living off the bounty that nature provides.

“Over the course of a year, Analiese must adapt to her new life, which like her cottage is a work in progress. As she learns to live seasonally from the land, she

faces the challenge of growing her first vegetable garden and raising her own pigs for meat,” explains Fiona Gilroy, content sales & acquisitions director at Flame Distribution. “Both are huge challenges for someone who doesn't have much of a green thumb — and who tends to ‘adopt’ her farm animals into the family! Analiese must learn to live with nature in new ways, including overcoming her life-long fear of bees.”

The series is more than just a cookery show, however, also covering issues of environment, adventure and eco-living, while Gregory learns to dive, fish, hunt and forage.

“From spearing flounder to

fly-fishing and shooting game, it's a journey filled with life-changing ‘firsts’,” reveals Gilroy.

Cameras also capture the beauty and wildness of every encounter - from the rugged charms of Bruny Island to the isolated splendour of Lake Peder, high in the Tasmanian mountains.

“As Analiese explores these landscapes, we travel through

stunning valleys, remote beaches, tranquil lakes, ancient forests, and a myriad of island and ocean wonderlands,” adds Gilroy. “Along the way, she encounters wildlife in a range of ways – from having to deal with naughty possums to sharing her wild environments with stingrays, octopus, wallabies, and all manner of birds and fish,” the Flame exec adds.





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The Water Guardians

Producers: j2f Production, LSD Films
Distributor: About Premium Content
Broadcaster: Canal+ (France)
Logline: Four-part docuseries following ordinary people in their efforts to solve the issue of water scarcity

One of two j2f-produced documentaries that APC is launching on to the market at MIPCOM (the other is *Wanted: Women In Science*), this 4 x 52-minute nature and ecology series explores the global issue of water scarcity through stories of those who have been working to preserve or discover sources of water.

“From Polynesia to the Sahel desert, via Las Vegas and Honduras, we meet men and women who are dedicated to their cause. Each of them, drop by drop, brings tangible solutions to this vital issue,” explains Emmanuelle Guilbart, joint-CEO and co-founder at APC.

Despite the seriousness of the issue, APC describes the series as a “highly optimistic journey, full of hope and realism” that meets a doctor, a diver, a mayor,

entrepreneurs and members of NGOs – ordinary people who have become today’s water guardians.

“Did you know that you can cut coral and transplant it like any other plant to make it grow?” asks Guilbart, revealing just an inkling of the unusual and fascinating facts uncovered over the course of the series.

“Titouan, a 22-year-old young man, discovered the simplest way to save the coral reef in Polynesia islands where he lives, and gathered a community of tens of thousands of people from all over a world who support him and his team by adopting the local coral reef.

“It is amazing to see how a small localised initiative can become a worldwide movement and have a real impact on environment,” she adds.

Black Panthers Of World War II

Producer: Like A Shot Entertainment
Distributor: BossaNova
Broadcaster: UKTV (UK)
Logline: The history of the US’s first African American armoured unit, their bravery in combat and the racism they experienced back at home – despite their heroism

This one-hour special tells the story of the US’s first African American armoured unit to enter combat during World War Two – the 761st Tank Battalion.

Known as the Black Panthers, the unit proved more than capable of living up to their motto of ‘Come Out Fighting’, but as this one-off programme reveals, they had to fight not only the enemy abroad, but also at home.

In America, the members of the unit battled against the racist Jim Crow laws, fought to be heard amongst a sea of white generals and trained in an era of segregation, which saw Nazi prisoners of war have more rights than they did.

“One of the key points raised in the film is that despite the racism they faced both at home and from within the army itself, the African American men and women who served throughout

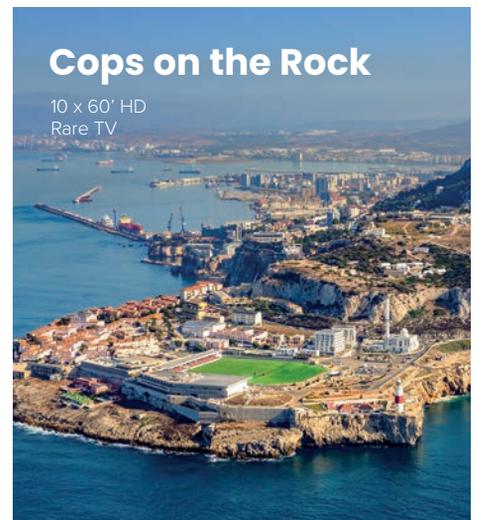
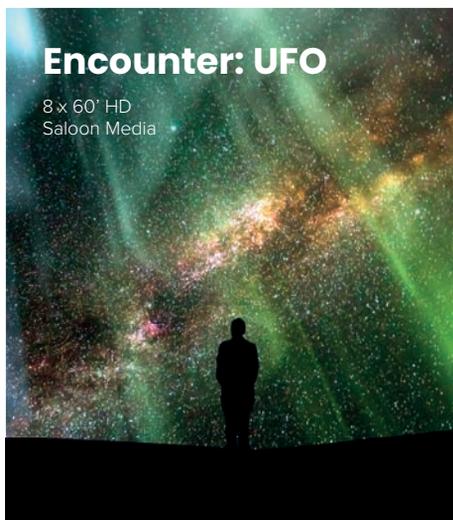
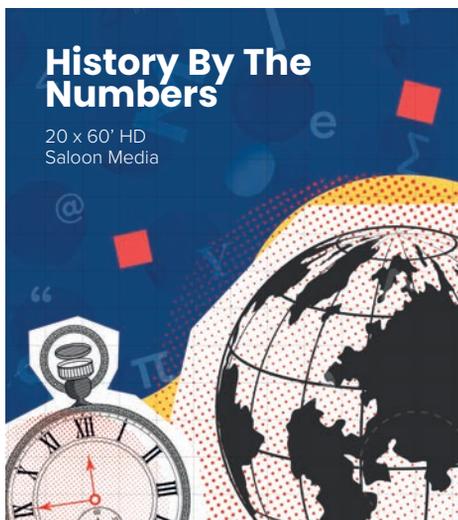
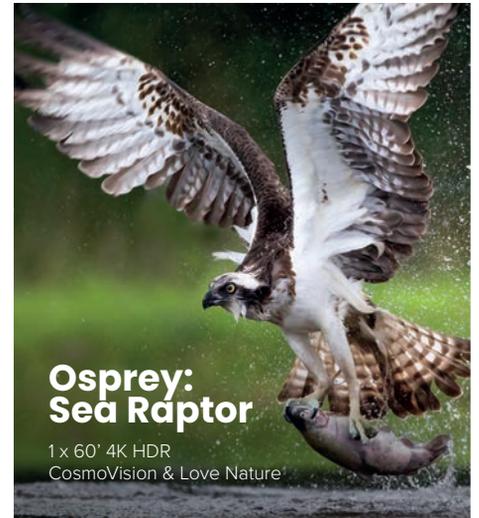
US armed forces showed incredible patriotism and a willingness to fight and even lay down their lives for the freedom of others - whilst they were faced with a lack of freedoms in their own country,” explains BossaNova CEO Paul Heaney and Danny O’Brien, head of development at Like A Shot Entertainment.

“One of the most surprising facts is that although the 761st Tank Battalion received over 390 citations for heroism, including a medal of honour and over 300 purple hearts, it was never actually intended for them to be sent into battle at all. The US military had considered them more of a PR exercise,” add the execs. “It was only as the war progressed and US losses became heavier and heavier that they were called into action, allowing to prove their worth on the battlefield.”



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The truth is out there

Streamers have found great success with documentaries, but is a bid for bigger audiences clouding accuracy?
Helen Dugdale reports

Every so often a documentary comes along that divides opinion. This year it was Netflix's *Seaspiracy* by UK filmmaker Ali Tabrizi, which explored, and some say exploited, the fishing industry's impact on sea life and the oceans.

While a lot of the media was ablaze with praise, there were other stories from NGOs and those featured in the film who weren't as happy. Tabrizi faced a rath of wagging fingers accusing him of

favouring headlines and chasing ratings above accuracy and integrity when it came to telling the real story.

It is a subject that has become increasingly discussed in the factual community, with some wondering whether filmmakers may skew the conversation to meet their PR aims and their own preferred narrative.

Thomas Viner, creative director at Pioneer Productions, the team behind *Ocean Autopsy*

Searching For Skylab producers went to great lengths to ensure accuracy in their production



and *One Hour That Changed the World*, admits *Seaspiracy* got many people fired up.

“From what I’ve read, it’s not driven by science, it is driven entirely by wanting to put across one point of view, regardless of whether it’s true or not. It’s a campaigning doc rather than a science doc. I’ve watched a number of these sort of films, and they tend to be preaching to the unconverted, they don’t usually have that much new material.”

Dwight Steven-Boniecki, the director of the film *Searching For Skylab* about NASA’s first space station that followed the Apollo program, also asks questions about the intentions of filmmakers. When it comes to US space program documentaries,

for example, he says they are often “riddled with footage from wrong missions.” Steven-Boniecki thinks they use such footage purely as eye candy rather than to maintain an accurate representation of the mission being presented.

“Apollo 14’s 16mm film of the launch of the Lunar Module is commonly used to depict the Apollo 11 launch. In *Searching For Skylab*, we went to great lengths to use only the footage that was from the theme being discussed. It is very possible to use correct footage without impacting whatsoever on the visual quality of the entire project.”

Addressing the auteur

While using the correct footage provides accuracy for docs, the way the story is actually told has become an increasingly scrutinised aspect for filmmakers. Fiona Gilroy, content sales and acquisitions director at Flame Distribution, believes that many good documentaries express a director’s point of view and, indeed, that is precisely what makes them interesting.

“Often, it’s that very auteurship that makes the documentary. Nor is it new for documentaries to become tools for activism of some kind. A documentary filmmaker like Michael Moore for example will usually acknowledge their bias from the start. That’s fine – but if the material is manipulated to support a point of view that’s not acknowledged to an audience, the lack of transparency can lead to the assumption that there is a veracity to the content that may not be the case.”

Steven-Boniecki suggests that more factual film producers are now aware of the need for accuracy. “I like to think my audience is intelligent enough to know when they are being hoodwinked.

“Granted one or two shots may not constitute a huge betrayal of the viewer’s trust, but it is important, if for no other reason than to maintain a high level of professionalism in stories being sold on their factual basis.”

For Tabrizi, the accusation was that he chased media coverage and a coveted place in the Top 10 shows on Netflix’s gallery, something *Seaspiracy* secured in the first few days of being released. Yet Woodcut Media’s creative director, Derren Lawford, believes that most factual content makers don’t just make films because they think it might play out well in the press.

“Documentary makers usually are trying to create a story. Getting media coverage is a by-product of that. If the documentary that you’re making is investigative and is holding power to account, then

“It is very possible to use correct footage without impacting on the visual quality of the project”

Dwight Steven-Boniecki,
Pernel Media



Seaspiracy has faced accusations of favouring sensationalism over fact



“Internationally there is no requirement for impartiality with journalists”

Thomas Viner,
Pioneer Productions



the chances are that is going to create some sort of ripple. Or if the story that you’re interested in exploring is telling people things that they didn’t know before, that might create some sort of a splash in the press.”

Viner from Pioneer applauds the factual production companies from the UK for generally giving more respect to the people they are working with. “In the UK we have Ofcom, and the quality standards are very high. That isn’t the same across the rest of the world. Internationally there is no requirement for impartiality with journalists and treating people well.”

SVODs impact on factual

Whatever your opinions on *Seaspiracy*, it is unlikely that it would have had a platform if it wasn’t for the SVODs. In the early days, some among the documentary elite suggested that streamers were in danger of watering down the quality of factual content, but the opposite now appears to be true. There is an increase in demand from global audiences for more factual content, whether that is about celebrities lives or more consciously minded stories from around the world.

“Factual content is getting a lot of interest and I think streaming and frankly the pandemic has helped get a lot of voices out there. More people have come to factual programming than perhaps once did,” says Viner.

Lawford believes the influx of streamers is also raising the bar for documentary ambition. “There is more appetite for more ambitious, thought-provoking docs than ever before.

“Factual content is getting the same waves as film and drama releases and I think the world of streamers is helping the genre. There is more of a desire for diverse stories from diverse sources and that can be only good for the industry too. The bigger, the bolder and the more ambitious, the better,” he says.

So could all the publicity that *Seaspiracy* brought the genre be a good thing? Certainly the headlines, both positive and negative, attracted new and committed documentary viewers flooding to Netflix.

Gilroy from Flame certainly thinks that factual content is having a renaissance. “There seems to be a mystique amongst documentary filmmakers about getting their content up on the big streaming services. They have been at the forefront of promoting a new age for the documentary, so it stands to reason that there’s a valid appeal attached to being a part of that.

“If filmmakers are picking subjects that might be of more interest to the streamers, it is not necessarily a creative compromise. Documentaries were becoming very marginalised before channels like HBO and the big platforms took up the mantle and began to commission and promote them to a new generation,” she says. “It’s wonderful to see this new golden age.” **TBI**

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Animated about Africa

Global streamers are looking to Africa for new kids and animation content. TBI's Mark Layton finds out what is attracting the big players to the continent

The eternal hunt for the next big thing to keep kids glued to their screens looks to have brought global streamers to Africa and its new wave of emerging animation talent.

Interest in kids and other animation content from African countries appears to have been piqued, with a modest, but noticeable flurry of originals commissions

from Disney+, Netflix and YouTube.

Kids and family programming is set to play a vital role in the expansion of global streamers in an increasingly crowded market, making it more important than ever to stay one step ahead when it comes to spotting the latest trends.

While recent orders and show launches over the past 12 months might not have

opened the floodgates just yet, activity in what some would say is an overlooked continent is certainly on the up.

Wave of new talent

Orion Ross, VP of animation for Disney Europe, Middle East & Africa, tells TBI that this surge of interest is down to a new

Mama K's Team 4 (opposite) is in development with Netflix, while *Iwájú* (right) is one of several African-produced animations bound for Disney+

generation of African content creators who have grown up with “unprecedented” access to global content and are now ready to bring their own stories to the world.

“These stories are fresh and authentic and at the same time have deep universal themes that will resonate with audiences around the world,” says Ross, who reveals that the Mouse House has had its eye on Africa for some time. “Disney’s EMEA animation team has been developing stories from the continent since 2015 when we joined a Story Lab for new African animation writers.”

The company’s global streamer, Disney+, unveiled two animated projects in June of this year: *Kizazi Moto: Generation Fire*, with South African producer Triggerfish Animation Studios overseeing the project; and musical comedy *Kiff*, developed by Disney TV Animation with South African creators Lucy Heavens and Nic Small.

These joined *Iwájú*, a collaboration between Walt Disney Animation Studios and Nigeria-based pan-African comic book company Kugali, which was announced at the end of 2020, as well as *Kiya And The Kimoja Heroes*, a co-production with Entertainment One, which has been picked up by Disney Junior and Disney+ globally.

Ross adds that as the service expands in the continent – it is expected to launch in South Africa in 2022 – he expects to see more commissions “in many genres”. He encourages creators to “seek out the best artists and kindred spirits you can, develop your idea with them, and bring us a pitch when you really know what your idea is and how you want to make it.”

The snowball effect

Cape Town-based Triggerfish was one of the companies that took part in the 2015 Story Lab with Disney, which in turn led to the development of Disney+'s upcoming *Kizazi Moto: Generation Fire*, a 10-part anthology of animated shorts exploring sci-fi and fantasy themes.

The series has “something for everyone”, says Triggerfish development executive



Tendayi Nyeke. “Ten different stories and ten very different visions of Africa’s future – but this is a future that has never been seen at this scale before. Creators have been encouraged and supported to tell their visions of Africa in the sci-fi genre. Africans defining their own narrative - this is exciting.”

Anthony Silverston, the company’s head of development, tells TBI that working on the Story Lab with Disney was “so inspirational” and had “such ripple effect in the industry” that they set out to find another opportunity to work with the company.

“*Kizazi Moto: Generation Fire* was the result of that – where new directors are getting a chance to develop their visions. The creative team at Disney are such a joy to work with – they are so invested and we’ve learned so much from them.”

Silverston says that the rise of global streaming services, such as Disney+, has helped to “widen the reach” in bringing African animation to the rest of the world and in turn given local talent more opportunities and experience in taking content worldwide.

“As the animation industry on the continent grows, more creatives are entering the industry, and so capacity increases along with the pool of talent pitching projects that are also improving in their understanding of what will work for a global market,” he says.

Nyeke adds: “The demand has always been there, but it had never been tested because no one had taken a big enough bet to see how the market would respond to content from the continent. When people did invest and saw that there was an appetite, it had a snowball effect.”

Triggerfish has also been working with Netflix and UK-based Cake on *Mama K's Team 4*, a superhero series that is set in Zambia. The show is currently in development for the streamer.

Created by Zambian writer Malenga Mulendema and designed by Cameroonian artist Malcolm Wope, the animation also boasts an all-female African writing team, which, Silverston tells TBI, Netflix were keen to set up.

The series, which Nyeke describes as being about “four kickass girl heroes saving the world in the most entertaining way”, comes as the global streamer continues its push into the continent in its attempt to capture new audiences.

Commenting upon *Mama K's Team 4*'s original announcement in 2019, Melissa Cobb, Netflix VP of original animation, laid bare the streamer’s aim to give “African writers a global platform on which to be heard” as well as praising the show for its “potential to give a whole new generation of African children the opportunity to see themselves on-screen.”

“[Streamers] are becoming aware of the demand that was there all along”

Tolu Olowofoyek,
Kugali





New perspectives

Tolu Olowofoyeku, co-founder of Kugali, the digital entertainment company that is bringing long-form sci-fi animation *Iwájú* to Disney+, tells TBI that its series will also offer global audiences a perspective on Nigeria that they might not otherwise have.

The show is set in futuristic Lagos and explores themes of class, innocence and challenging the status quo. Olowofoyeku says it is a “love letter” to the country and the state in particular.

“The world hears so many negative things about us in the news, many of which are exaggerated, but they know very little about us outside of Afrobeat music and, more recently, Nollywood films. This is an opportunity to show them so much more.”

He also agrees with Triggerfish’s Nyeke, in that audience demand for content produced in African countries has always been in demand – it’s just that more service providers are now taking notice.

“I don’t think it’s rising. I think those with the resources to do something about it are only just becoming aware of the demand that has been there all along.

“Almost 20% of the world is African, and that number would be considerably higher if you took the diaspora and those of African descent worldwide into the count,” notes Olowofoyeku.

“In the same way as the demand for

Bollywood movies or martial arts movies are not limited to only the regions they originate from, the demand for African stories is not limited to people of African descent, and this demand did not just suddenly pop up.”

Gaining international attention

Vanessa Ford, COO at Kenyan animation studio Kukua goes a step further and suggests that there has been “a stubborn underestimation of the African entertainment industry as a whole.”

She credits the current change with increasing global awareness of afrobeat music, Nollywood and pan-African collaborations such as 2018’s box office-busting Marvel sci-fi superhero feature *Black Panther*. The latter could be a possible indicator as to why the original streaming commissions highlighted in this piece are chiefly focused on African futurism or superheroics.

“Also, with movements like Black Lives Matter, the world has woken up to the importance of celebrating our and other people’s cultural heritage, while children deserve to see themselves reflected in the books they read and the cartoons they watch,” observes Ford.

Nairobi-based Kukua is behind YouTube Original *Super Sema*, described as Africa’s first animated superhero series for children, and follows the adventures of a young

girl, Sema, who lives in a futuristic African community.

The series debuted on YouTube earlier this year and is executive produced by company shareholder Lupita Nyong’o, who also voices a character in the series and, coincidentally, starred in *Black Panther*.

Ford tells TBI: “Historically it’s been almost impossible to monetise African children’s storytelling, it is not an industry many understand locally and there’s not enough data to convince investors of the opportunity despite the abundance of talented African artists, writers, actors and animators.”

She says that Kukua has been fortunate to have investors and the backing of YouTube, which has already commissioned a second season of *Super Sema*.

Ford, however, notes that she is seeing new opportunities beginning to open up – with the global streamers leading the charge. “There’s definitely been an opening for a symbiotic exchange more than there has been in the past, and global studios like Disney and Netflix are doing ‘first of its kind’ collaborations with African storytellers. The world is also recognising that we as Africans need to be a part of telling our own stories. It’s our roots and wings, and it’s a way of saying, ‘I’m here and I matter.’”

Ford has certainly witnessed a global appetite for *Super Sema*, with the show racking up “millions of views” in the first two weeks of its debut on YouTube, with more than half of those coming from outside Africa. “This was really important for us because it proved that there is an appetite for an African children’s show even outside of Africa, and that the content was resonating with children and families globally,” said the exec.

While the rest of the shows highlighted in this piece are still in development, it is encouraging that *Super Sema* has found such a warm global response. And if other animations from the continent – particularly following this trend of futuristic superheroism – are just as well received, then more are sure to follow. **TBI**

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Why anime has become hot property

TBI deputy editor Mark Layton digs into what is driving global demand for anime and how streaming services can make the most of the medium's passionate fanbase

Global demand for Japanese anime content is skyrocketing, with streamers worldwide increasingly recognising the appeal – and subscription-driving potential – of this medium, once seen as niche, but now unquestionably widespread.

It's been hard to miss the heavy investment from the likes of Netflix and others in acquiring anime or commissioning their own content over the past couple of years. Meanwhile, if ever a demonstration of anime's international resonance was required, the feature film, *Demon Slayer -Kimetsu No Yaiba- The Movie: Mugen Train*, succinctly proved the point by storming the global box office last year, earning over

The feature spin-off from *Demon Slayer* (above), which is carried by Funimation, topped the global box office last year

\$500m to become the most financially successful film of 2020 worldwide – quite a feat during a pandemic.

Raising the bar

“More money is pouring into anime production, with a main catalyst being Netflix's growing prominence, which has in turn elevated the overall quality of works being created,” explains Kako Kuwahara, Nippon TV's EVP of business development, highlighting some of the major factors leading to anime's current heyday.

“From the viewers' perspective, the emergence of technology that enables simultaneous streaming all over the world, the increase of translation apps and

social media have created the ideal situation that allows them, wherever they may be, to enjoy the same titles while sharing their thoughts.”

Tokyo-based Nippon TV has been producing, broadcasting and distributing anime both domestically and internationally for decades, with shows such as *My Hero Academia*, *Death Note* and *LUPIN THE 3rd* among its titles, but it was just last October that the company set up a dedicated anime department, headed by Kuwahara.

The unit launched with an adaptation of Kei Azumi's manga *Tsukimichi – Moonlit Fantasy*, produced by C2C Studios, while recent offerings include *LUPIN THE 3rd PART6*, from TMS Entertainment.

Kuwahara explains that the success of the *Demon Slayer* movie has “raised the bar” and highlighted the “allure of Japanese anime all over again.” Consequently, the exec says that the nascent anime department was met with “immense” international demand for content right from the get-go.

“The environment was already favourable with globally- eminent players increasingly eager to commission projects, and the offers we receive are sometimes even higher than we expect.

“We also receive exciting proposals to invest in our content. An overseas partner agreed to fund a title three years before the release and we now have the framework to pursue game adaptations, merchandise, and comicalisation as well. Indeed, the volume of anime that Nippon TV produces and distributes is increasing rapidly.”

Bringing classic shows to new audiences

Amazon Prime Video is among those globe-spanning streaming services whose expansion has undoubtedly contributed to a renewed awareness and interest in classic anime titles and a subsequent demand for new content.

The streamer carries around 70-100 anime titles at any one time, such as *Vinland Saga* and *Dororo*, as well as two originals – historical action *Blade Of The Immortal* and comedy series *Crayon Shin-chan Spin-off*.

As Martin Backlund, Prime Video's head of content for the UK, Ireland and Nordics, explains: “Anime has always had a rich storytelling history, but until recently the genre hadn't been as exposed to international audiences. The growth of global streaming services has given the audience access to troves of iconic anime stories and exposed them to younger audiences often for the first time.”

“More money is pouring into anime production, with a main catalyst being Netflix's growing prominence”

Kako Kuwahara,
Nippon TV



Backlund says that without the constraints of a programming schedule, streamers like Prime Video are able to provide a broad content offering and cater to audiences looking for “previously lesser-known genres” such as anime.

“Additionally, the distribution channel allows us to deliver high quality subtitled or dubbed content, which has eliminated the language barriers that historically existed for all but the most popular titles.”

Backlund adds that, as a global service, Prime Video tailors its approach to anime to each region. “Our local Prime Video content teams also pay close attention to the genre and the local audience to ensure we do not take a one size fits all approach.”

The streamer, he reveals, also sees the potential in more directly engaging with its anime fanbase. “We are also investing in deepening our relationship with our anime fans. We recently premiered our first anime-centred IGTV show called *The Animation Conversation*, which has given us the opportunity to strengthen our relationship with our anime audience.”

Engaging with the audience

One local player firmly seizing the potential in anime is Dubai-based Starzplay, which, seeing a gap in the market, declared itself the region's “home of anime” in February, following an expansive deal with the TV Tokyo Corporation.

The SVOD, which streams Arabic and Hollywood content to 20 countries across MENA and Pakistan, increased its existing anime offering by more than a thousand hours, including the hit *Naruto* action franchise and romantic comedy *Fruits Basket*.

Starzplay CEO Maaz Sheikh says his confidence in anime content was greatly bolstered after the streamer initially tested the waters last year. It acquired both the streaming rights to the latest season of superhero show *My Hero Academia*, which had been the most popular anime of 2020, as well as theatrical rights to its movie spin-off, and launched both at the same time.

“We were quite surprised, almost shocked, at how well it did and so from that point on we kept building on that strategy,” says Sheikh, adding that the depth of interest for anime in the region was unexpected.

“The passion for anime in this part of the world is crazy. People learn Japanese just so they can watch anime simulcast the same time as Japan.” Specifically, Starzplay's highest anime consumption comes from Saudi Arabia, with *Fruits Basket* doing particularly well there, while viewers in Egypt are also “big fans.”

As well as currently simulcasting three titles – *My Hero Academia*, *Kingdom* and *Fruits Basket*

– with Japan, Starzplay’s large boxset offering has allowed it to localise content by dubbing into three Arabic dialects – a decision made following a fan engagement campaign.

Sheikh reveals that audience engagement around Starzplay’s anime content far outstrips any other type of content shown on the platform, while Khaled Benchouche, SVP of strategy & original content at the streamer, describes the region’s community of anime fans as “mindblowing”.

Benchouche further echoes Kuwahara and Backlund’s points about anime’s rising global popularity being aided by the growing ease of simulcasting, localisation and social media interaction – both between the fans themselves and with services that show anime content.

He also highlights anime series as having strong storytelling that appeals to viewers in the territory as they don’t require understanding of western contextual references.

Moving into the mainstream

It appears difficult to discuss the current rise of anime without also addressing its passionate fandom, and it seems clear that there are big opportunities for streamers to further leverage their content by fully engaging with those communities.

This is something that Colin Decker, CEO of global anime-focused business Funimation, well appreciates. “We must profoundly understand this customer, our community, in a way that many industries simply do not have to do.

“I do believe that is the future of business on just about every level. There’s a lot more room in the

Fruits Basket has been very well received in Saudi Arabia, says Starzplay



world for what I would call communities of interest, or category-specific things, not because of the content, but because of the community itself,” says Decker, suggesting many anime fans are drawn simply to the medium of anime rather than specific shows.

Culver City-based Funimation is a joint venture of Sony Pictures Television and Sony Music Japan/Aniplex and a global distributor of anime, including titles such as *Dragon Ball*, *Attack On Titan*, *Cowboy Bebop* and *Fullmetal Alchemist*.

Its SVOD service offers a growing catalogue of more than 700 anime series and 13,000 hours of content available in 52 countries dubbed into six languages, sometimes as soon as the same day of the original Japanese broadcast.

The company’s other pillars of business include theatrical releases and home entertainment and last year it held its first virtual FunimationCon 2020, making deep in-roads into community engagement.

Digging deeper into this fandom, Decker highlights that the anime community is “very much about identity” and “highly inclusive” with content over-indexing with minority groups, the LGBTQ community, and “any group that is perhaps slightly outside the mainstream”.

At the same time, Funimation was also the US distributor for the *Demon Slayer* movie, with Decker noting that it was “officially the number one movie of 2020 globally; so I’d say that’s pretty mainstream.” The service also took streaming rights to the feature for the US, Canada, Australia and New Zealand.

Demand for anime is now also being translated into M&A activity. Sony has doubled down on the genre, buying WarnerMedia-owned anime streamer Crunchyroll for almost \$1.2bn last year, and the service, which claims three million paying subscribers, is being incorporated into Funimation.

That agreement, which includes streaming rights to more than 1,000 anime titles, is turning Funimation into the largest anime-dedicated streaming service in the world and putting down a marker that underlines ambitions for both Sony and the genre as a whole.

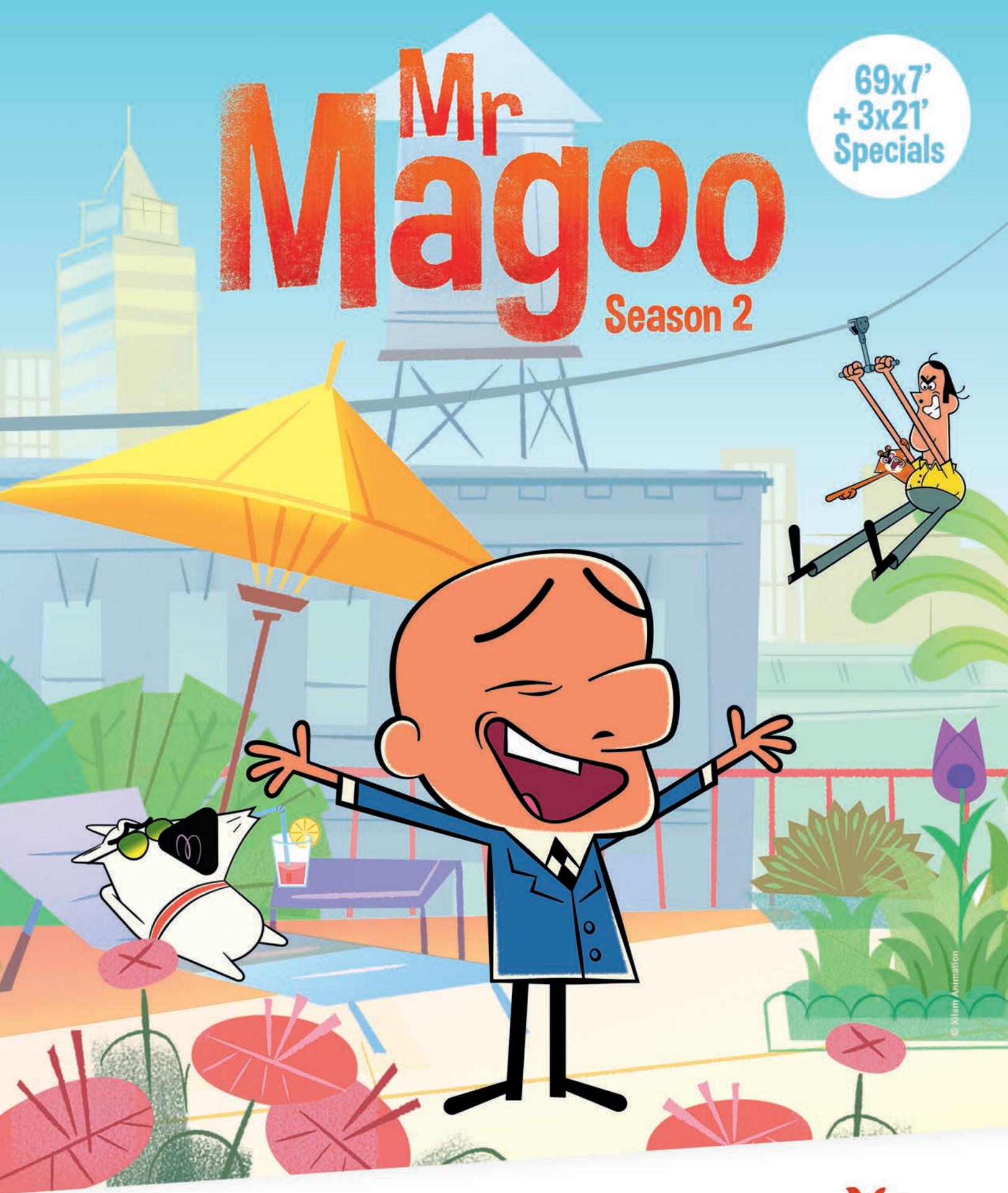
From these conversations, at least, it seems clear that the production and distribution of anime is only set to further expand in the coming years, particularly as regional audiences continue to gain access to proven shows just waiting to be localised – and demand for more and new, original IP rises.

Those streamers willing to take that extra step and fully engage with this passionate audience may well find a subscription-driving fanbase switching on, looking to consume a range of content from across the medium. **TBI**

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Specials



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Cartoon Forum: The Highlights Reel



After an online-only event in 2020, Cartoon Forum returned to its regular home in Toulouse, France, in September, with festival organisers claiming close to 900 participants, including around 200 buyers and decision makers physically on site.

The organisers also ran an online digital platform, allowing those international buyers still unable to attend due to pandemic restrictions to check out some of the latest animated kids content to hit the market.

As always, there were plenty of new projects to entice buyers over the course of the four-day physical event, with a total of 84 new titles from 21 European countries being presented.

Shortlisted from 141 submissions, the 84 projects represented 460 hours of animation, with a total combined budget of €326.1m (\$380m) and an average cost per series of €3.9m.

As per last year, France led the selection once again, with 33 projects, while Ireland retained its second place with 11.

Germany brought eight, Spain six and Belgium five, while the

Czech Republic, Denmark and Portugal were represented by four projects each. Italy and Poland, meanwhile, showcased three projects apiece, while companies from Finland, Latvia and Ukraine arrived with one each.

This year's Spotlight was focused on five new animations produced or co-produced in Portugal, a country that is traditionally known for producing original short films, rather than features or series.

Bucking that trend, this year's offerings included preschool show *Biriki*, from Sparkle Animation and Abano Produções, and young adult series *Pete & Bern's*, produced by Sardinha em Lata. Also on the slate was Ukbar Filmes' *The Adventures of Princess P*; *The Saskatoons* from Pikkukala and Sardinha em Lata, and *What's It All About? From Take It Easy*.



Cartoon Tribute returns

Cartoon Tribute returned following its hiatus last year, with Belgium's Ketnet-VRT, French studios Miam! Animation and TAT Productions awarded for their outstanding contribution to European animation over the course of the past year.

Ketnet-VRT was named as broadcaster of the year, Miam! was awarded as distributor/investor of the year, and TAT was recognised as producer of the year. The awards were decided following a vote by the roughly 900 registered Cartoon Forum participants.

Dad takes top spot

Living With Dad, the animated comedy being developed by Frances's Dupuis Edition et Audiovisuel with Belgium's Belvision for French network M6, was ranked as the top most-followed internationally co-produced project of the forum.

The 52 x 11-minute series is based on the Nob comic book and follows the daily life of an "endearing and nicely crazy" family. Aimed at 6-11 year olds, it is sold by Mediatoon Distribution.



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Top Pick



Dounia

Producer: Tobo Media

Distributor: Dandelooo

Broadcaster: CBC Gem+ (Canada)

Logline: Animation following a young Syrian refugee as she travels the world in the search for a new home

Arriving on the global market at what feels like a particularly resonant time, this 6 x 8-minute animated series tackles issues of war and displacement in a way that is suitable and informative for audiences aged 6-9.

It follows the story of the titular Dounia, a young Syrian girl who is forced to flee her home in search of a new one, due to violent conflict, becoming a refugee on an international journey.

“With *Dounia*, I wanted to raise important questions to start a conversation with children, while creating an initiatory tale that is universal, full of poetry, of magic and joy,” show creator, writer and co-director Marya Zarif tells TBI. “Since the start of events in Syria in 2011, I have observed how the subject has been both over-publicised and very poorly understood. All of a sudden, the country of my childhood was nothing more than a name for desolation and destruction.”

Joined by her grandparents as she travels around the world in search of asylum, Dounia encounters many people and experiences many great adventures. And, when she encounters an obstacle that

seems insurmountable, the wisdom of the ancient world comes to her rescue in the form of the baraké seeds of her grandmother.

“It was important for me to tell a story that dug deeply into Syrian culture. Details of daily life, traditions around cooking, music, myth, legend and, quite importantly for Syrians, the language itself and its mosaic of images and historical references were all celebrated,” explains Zarif.

“The magic of the baraké seeds represent the roots of Dounia. Like the seeds, this magic finds its place in the smallest things, which remain no less ever so rich and marvellous. Ultimately, this is what will allow her to overcome life’s obstacles and move forward.”

Zarif is quick to point out that the uprooted Dounia is “far from being a victim” and instead is “an empowering little magician who finds in herself the resources to overcome obstacles.”

“Thus, she embodies a lost generation of little migrants. She gives a voice and a face to these children and offers them a positive reference model that will help them overcome their traumas,” says Zarif.

Superworm

Producer: Magic Light Pictures
Distributor: Magic Light Pictures
Broadcaster: BBC One (UK)
Logline: Super-stretchy superhero Superworm learns a lesson in humility when he falls afoul of the evil Wizard Lizard

An annual fixture on BBC One in the UK at Christmas, Magic Light’s latest adaptation of a Julia Donaldson and Axel Scheffler children’s novel tells the story of a hero with a difference.

Superworm is a super-long, super-strong earthworm, who always comes to the rescue of bugs and animals in distress.

However, as Martin Pope, joint MD at Magic Light Pictures and executive producer of the 1 x 30-minute animation, explains to TBI, this earthbound hero faces some big challenges.

“Superworm is long and strong, but even though he has to contend with an evil Wizard



Lizard who puts him under a spell, actually the biggest challenge Superworm faces is to learn some humility. Will he realise in time that he needs his friends to help him defeat the threats they are all facing?”

Pope asks. And who will come to Superworm’s rescue when he’s captured by the wicked Wizard Lizard? Luckily, all of Superworm’s insect friends have a cunning plan.

“It’s entertaining and

funny,” says Pope of the show. “Superworm is a great showman, the evil Wizard Lizard is compelling, Butterfly is a wonderful friend – and the story brilliantly demonstrates why we all need our friends.”

Happy House Of Frightenstein

Producer: Headspinner Productions
Distributor: Distribution360
Broadcaster: Marblekids YouTube Channel
Logline: Animated update of iconic Canadian series following the misadventures of mini monsters

Currently available on YouTube, with a Canadian linear broadcaster soon to be announced, this new 10 x 3-minute preschool series is an animated update of the classic 1970s live-action show *Hilarious House Of Frightenstein*, released in time to celebrate the original show’s 50th anniversary.

The series follows the misadventures of Count Jr, Wolfie, Iggy and Griz, the characters from the original show – now reimagined as children – as they play, laugh,

and grow together in the Happy House of Frightenstein, a giant castle-like play structure located in the spooky backyard of the iconic Castle Frightenstein.

“We are huge fans of the original series so we took inspiration from the OG characters and brought them to life as mini monsters/junior versions that would resonate with younger kids,” explains executive producer Michelle Melanson from Toronto-based Headspinner.

The exec adds that she sees great potential for this reboot

of what became the longest-running Canadian children’s show to entertain youngsters across the globe.

“Kids around the world will love the ‘Frightenstein’ twist on games like Hide and Go ‘Eek, and taking what are usually more scary characters like vampires, witches and

werewolves and making them cute and playful mini monsters makes for a great entry point for young viewers,” she says.

“The shorts are perfect for platforms and channels looking for Halloween related content. They are great for on demand platforms or for linear TV interstitial scheduling.”





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Claymotions

Producer: SMF Studio

Distributors: Jetpack Distribution

Broadcasters: Karusel (Russia)

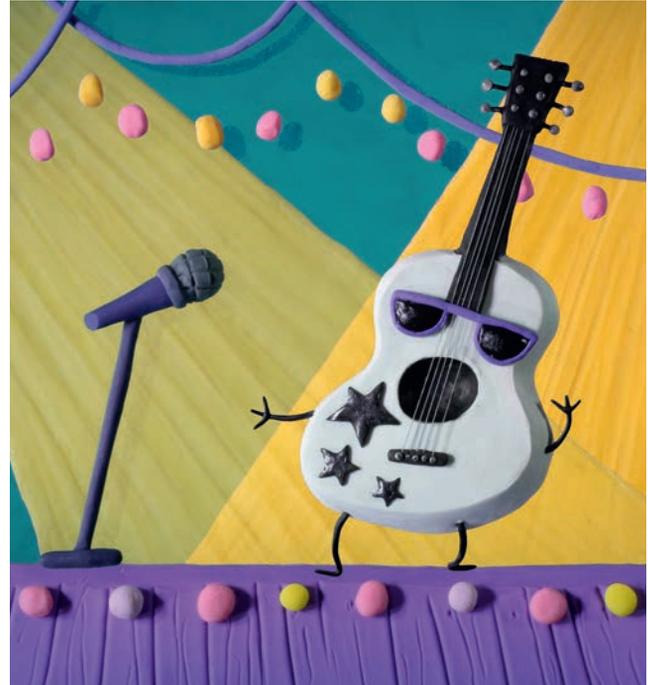
Logline: Good-natured plasticine characters transform into amazing shapes to amuse and educate young children

Aimed at a preschool audience, this educational miniseries from Moscow-based SMF Studio seeks to teach young viewers about all the things that go on around them and widen their understanding of the world at large through adventures and fun games.

The titular *Claymotions* are seven sweet and positive plasticine characters that can transform into anything they like – more often than not with amusing results.

“Curious and playful, they explore the world around them in an engaging manner, providing facts and trivia about worldly subjects such as numbers, animals and music,” explains Dominic Gardiner, CEO at UK distributor Jetpack.

“The transformations are visually fun and fascinating to watch,” he adds. “Especially in clay animation and the educational subjects are relevant to all young kids around the world.”



CG Odyssey

Producer: TeamTO

Distributor: TeamTO

Logline: A video game-loving youngster is transported into the world of Greek legends, which are explored through a modern lens

This new 26 x 22-minute animated series from France’s TeamTO sees the worlds of mythology and gaming collide as youngster Kiran is unexpectedly thrust into Greek legends.

Together with his new friend Leuki, the daughter of Hades, and his video gaming skills, Kiran attempts to keep the course of history on track.

“The serialised story arc

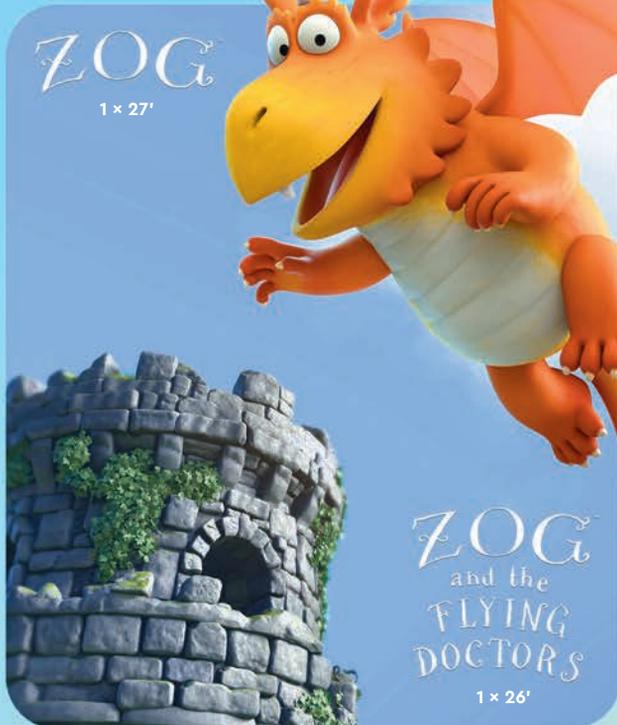
of the show follows Kiran and Leuki as they fulfil their mission to keep Odysseus safe on his journeys,” elaborates Mary Bredin, TeamTO creative development producer. “Along the way they have to outwit, evade or battle their way beyond all sorts of things, like Cerberus (a multi-headed dog), a giant Cyclops, and the snake-like monster, Pythos.

They travel through Hades, Atlantis, a sacred cow island, and other mythical places – the adventures are constant, fun and action-packed.”

Bredin adds that the series is not so much about teaching these myths to young viewers, but more reframing them with a modern twist – and through a lens of diversity and awareness.

At the same time, these fables have been with us for generations and Bredin says that is exactly what makes the show appealing to an international audience: “The classic stories of mythology have been taught and shared for centuries across the entire globe – and for good reason. They contain all the elements of a nail-biter (treachery, revenge, action heroes, mythical creatures, jealousy, power, love...) along with lots of fantasy to engage the imagination, and of course, all-important, ever-present humour,” says the exec.





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Show & tell

Showrunners Soo Hugh (*Pachinko*, *The Terror*) and Alon Aranya (*Tehran*, *Your Honor*) tell TBI how they got started, their favourite shows and the series that were cancelled before their time

Soo Hugh



In two sentences, tell us how you became a showrunner and why.

I started off as a film snob who thought television was a lesser art. This was many years ago, and once I discovered how empowering the TV medium was to a creative vision, I knew I wanted to be a showrunner and was lucky enough to sell a crazy show to ABC that actually got made.

What's the hardest part of your job?

Believing in myself. Making a series has become a long, long process. There are a lot of voices that come in and out of the chorus and it's all too easy to stop hearing your own voice within. While collaboration is a crucial part of this job, so is knowing when to stop listening and just act. Otherwise, the talking will never stop.

What helped you to become a showrunner?

Ignorance. I didn't know all the rules on my first show, so I didn't know where the lines were drawn. I can't use that excuse anymore, so I would say that what helps me the most now in my career is working with people I trust and respect and bringing them aboard from show to show.

What is the biggest challenge facing the industry?

Risk averseness. Fear of our own creative shadows.

How can the industry improve diversity off-screen?

Get rid of double standards. Allow diverse voices the same rate of failure as everyone else.

Best show to be cancelled too soon?

Deadwood (above, right). Otherwise, I feel like shows run for too long!

Which show nailed its finale and why?

I know it's not the most imaginative thing to say but *The Sopranos*. A head-scratcher initially that has now mellowed into that, 'a-ha' of inevitability. Of course. Now, it's iconic.

What has been your proudest moment in the industry?

Crying on set behind the monitor because I was so moved by the scene.



Alon Aranya



In two sentences, tell us how you became a showrunner/producer and why.

I studied dramatic writing at NYU Tisch and after working as a writer for a few years, I realised I could use my storytelling experience to develop and produce shows. I was able to get the rights to a few scripted formats from overseas to adapt in the US market. I will always be a writer but the realisation that I'm not only a writer opened up the possibility to become one of the leading international drama producers in the world.

What's the hardest part of your job?

I spend hours every day talking with writers overseas about doing another rewrite, another polish to elevate their material to meet the expectations of global buyers. Most writers outside the US understandably can't always afford to do endless work in development because they aren't paid enough for their time. This is a serious challenge in developing international drama as it can impede the quality of drama development and production in the years to come.

Name the best show of your lifetime?

I'm not sure there is only one title but I know that *The Sopranos* (left), *Mad Men*, *Breaking Bad* and *Seinfeld* are on my all time favourite list.

Best show to be cancelled too soon?

There was a great show on FX called *Terriers*. It was fantastic but probably premature for its time.

Which show nailed its finale and why?

Mad Men. It delivered on every level but mostly completed the journey of Don Draper true to his character and the DNA of the show.

What has been your proudest moment in the industry?

Producing *Tehran* and seeing it became a global hit via Apple TV. I'm now under a first look deal with Apple TV and it's definitely my proudest and biggest career achievement. The other one is making *Your Honor* with Bryan Cranston. A show that was born out of an Israeli format and became one of the best drama series I've ever seen. **TBI**

Soo Hugh and Alon Aranya spoke at virtual webinar series, *Showrunners Breaking The Mould*, run by LA- and London-based consultancy MediaXchange



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Thank you all!





Last Word Siobhan Crawford

For The Love Of God, Buy A Format!

“Ignore the briefs, create unexpected formats and we can change commissioners choices simply by showing them the possibilities”

Earlier this year, I asked if formats had a future in a world where commissioners are looking at talent instead of track record and where streamers are ignoring a sea of IP in favour of derivative paper ideas with worldwide rights. The response was phenomenal. So many people reached out in agreement and support. Creatives and prodcos are unable to develop or acquire in a meaningful way whilst these programming briefs exist and it is time for change. I had so many interesting conversations but it brought up more questions: why are creatives re-creating existing formats and calling them new? Should you be exploring the sea of content before creating/acquiring? Well, here’s where to start.

Step 1: Buy formats

The obvious response is to buy an original format, reward creatives who create and producers who adapt. Here are a few shows that you could acquire, all of which have the ‘authentic’ seal of approval.

Old: *Brat Camp*. Young adults and teens, wayward, in need of direction are taken to a rural retreat. First broadcast in 2005, available from WBTV and has a track record in the UK and USA. Possible to produce on a snowy mountain. Or if you want to support a small independent, you could also look to La Conceperia for *The Older Brother*.

New: *Open Love*. Continuing the charge taken by ViacomCBS’s *Prince Charming* in broadening the dating category to be more inclusive, WeMake have progressed to gender blind dating without lines or boxes.

Spin-off: *99 To Beat*. Full disclosure, this is distributed by my company but it has earned a mention as it’s a collaboration by four companies adapting an existing format to fit each of their needs. Adapted from a five-minute segment into commercial hours for primetime, it now also has a successful VIP and kids spin-off series.

Step 2: Be responsible

We are internationally stuck in a rut of recommissions, low-risk scheduling and reboots. The Covid ratings

spike has passed, the world is opening up and we are losing eyeballs fast. Broadcasters are now hyper-aware of any content they commission. The market is getting smaller as producers are finding less third-party content available to acquire due to mergers and acquisitions. We also have the prodco group mentality of being “laser trained to retain as many rights as possible and to focus on IP retention” – which raises the question about the creation of derivatives to maximise commercial potential.

I believe people should be aware of the content around them - and that includes creatives – and be informed about the competition and your own USPs (Unique Selling Points). If you don’t know what formats exist in the market, reach out to K7 or The Wit, get informed. Derivatives should go against the principles of the creatives and companies who proudly hold FRAPA membership. Buy a paper format if the concept is original to the market, but to create and commission a paper format that is a derivative of another seems counterproductive when track record and established brands are the subscriber drivers that so many want. This is an industry built on relationships, so create and acquire smarter.

Step 3: Create!

We know the genres that are needed: social experiment, dating, shiny floor and crime. Let’s completely ignore talent-led stories. Or perhaps, as someone very wise told me, ignore the briefs and create unexpected formats and we could change commissioners choices simply by showing them the possibilities. If *The Masked Singer* has taught us anything it is that bold works. *Naked Attraction* shows that bold works. *Married At First Sight* shows that bold works. Someone said to me it is harder to be a fan of other peoples’ content than your own, which is fine but follow the rule: if you create a format and you can think of another format that sits in the same space as it, move on – or acquire it! And if you need insight, speak to a distributor, because they will have many thoughts, of that I am sure. **TBI**

Siobhan Crawford is head of sales and acquisitions at Belgium’s Primitives, the distributor of formats including *The Mole* and *Reputation Rehab*

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