

TBI Television Business International

Going public
European pubcasters' existential fear & what they're doing about it
Page 32

Sales targets
Global insight into the distribution business & what to expect next
Page 20



SURVIVOR

OUTWIT • OUTPLAY • OUTLAST

25

YEARS

THE ADVENTURE CONTINUES

"NO.1 REALITY SHOW OF ALL TIME"

VARIETY

#Storymakersforalifetime



Banijay
Rights

A FAMILY CRIME THRILLER

NORTH SEA CONNECTION

GOOD FAMILY. BAD DEEDS.

6 x 1 Hour

A + E

GLOBAL CONTENT SALES

CATALOGUE.AENETWORKS.COM



MYSTERIES OF THE ANCIENT DEAD

6 x 60'
History & Mystery



YOU SHALL GO TO THE BALL

1 x 60'
Lifestyle



CAUGHT ON DASHCAM

4 Series: 29 x 60'
Entertainment



Visit us at stand no: R8.C7

BOSSANOVA

The new wave in Distribution



SIEGFRIED AND ROY: THE ORIGINAL TIGER KINGS

1 x 60'
Documentary



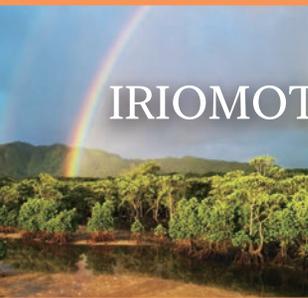
COLD CASE KILLERS

2 Series: 12 x 60'
Crime & Investigation



EXTREME TOW TRUCKERS

2 Series: 19 x 60'
Access & Obs Docs



IRIOMOTE - THE FABRIC OF LIFE

1 x 52 min



NINJA TRUTH

20 x 15 min



See Japan in a whole new way



The Unknown Master of Restoration

1 x 49 min



Cycle Around Japan

48 x 49 min



From Foe to Fortune: Living with Nuisance Wildlife

1 x 49 min



Contents TBI October/November 2022



16. View from the top

Richard Middleton hears from decision makers at RTS London

20. TBI Distributor's Survey

International distributors, with catalogues representing close to one million hours of programming, share their content & sales insights

32. Public reflections

Marie-Agnès Bruneau takes a trip around Europe to discover how public broadcasters are coping with increased pressure from all sides

38. Dodging the bullet

Mark Layton delves into what it takes to resurrect a cancelled series

44. Script to Screen: *Blue Lights*

With BBC Studios's new crime drama *Blue Lights* coming to market, the show's creators talk TBI through how they brought it to life

48. A clash of Rings & Dragons

TBI quests into the epic worlds of Middle Earth & Westeros

52. Talking talent

Sons Of Anarchy star Ron Perlman on the evolving scripted industry



54. Word on the street

Quay Street founder Nicola Shindler on her slate & industry trends

56. Spanish surge

TBI talks to those creating the next Spanish drama hits

66. Attention grabbers

A-list talent is becoming a 'must-have' addition for unscripted projects. Tim Dams looks into this growing trend

72. Seeking the truth

TBI explores if lines are being crossed in the true crime genre

76. Whole new worlds

Lifting the lid on what's happening in the metaverse



84. Going up

Prime Video and Netflix have both enjoyed huge recent success with French unscripted formats. TBI finds out what's next

88. Paper format creators you need to know

Siobhan Crawford provides the lowdown on key creative minds

90. Next-step innovation

A dive into how format experts are making the most of technology

94. Uphill battle

TBI explores how to cut through in the format industry

102. Coming of age

Helen Dugdale finds out what YouTube offers kids that others cannot

106. The winds of change

Hoho tells Mark Layton about plans to adapt *Wind In The Willows*

109. Cultivating curiosity

TBI discovers how kids can be encouraged to try new shows

Plus: 6 Editor's Note • 10 Diversity • 11 About Town • 12 Tech & Analysis • 14 Legal • 60 Scripted Hot Picks • 78 Factual Hot Picks
82 Formats opinion • 96 Formats Hot Picks • 112 Kids Hot Picks • 116 Last Word: Shaun Keeble, Banijay Rights



Editor's note Richard Middleton

Forward march

A lot has changed since we were all last here. Flicking back to TBI's MIPCOM 2021 edition, it was clear that everyone was bracing themselves for a lower key trip to Cannes than normal, as travel continued to be disrupted. This time, it's all rather different.

For a cynical hack, 'excitement' is something that normally tends to reside in marketing copy and the quotes of executives who have just hired, or been hired. Yet as we're putting this edition to bed in late September, it is hard to recall a time when the anticipation for MIPCOM has felt so great.

There's no need for me to regurgitate the immense change the industry has gone through over the past few years, but for the thousands of us who will be marching down to la Croisette this week, there seems to be as much potential for growth – and, dare I say it, excitement – as ever.

We reflect that, as well as the challenges, in this edition. First, take a look at the thoughts of some of the biggest execs in the industry on page 16 to find out where they think we're all going next and then head for our extensive global distribution survey (page 20) to find out the latest trends on the sales front.

Make sure you don't miss our deep-dive into the future of public broadcasters across Europe (page 32) – while this group of organisations might not be seen as at the cutting edge of the industry, they quite often are and, as importantly, they have huge amounts of spending power, although will it last?

We also speak to Ron Perlman about his incredible career, get the lowdown on some of the best Spanish scripted creatives and explore how talent is being drafted in for unscripted fare. And if you've had bad news about your show, check out our fascinating feature on saving cancelled scripted series (page 38).

Last, but by no means least, thanks to everyone who put this issue together, in particular our ever-patient and immensely talented art director Matthew Humberstone.

Have a great market and see you at Brown Sugar...

Contact us

Editor Richard Middleton
richard.middleton@informa.com

Deputy editor Mark Layton
mark.layton@informa.com

Contributors: Marie-Agnès Bruneau, Siobhan Crawford, Tim Dams, Helen Dugdale, Shaun Keeble, Tim Westcott, Julian Wilkins, Deborah Williams

Sales manager Michael Callan
michael.callan@informa.com

Art director Matthew Humberstone
matthew.humberstone@informa.com

Marketing executive Abigail Appiah
abigail.appiah@informa.com

Editorial director Stuart Thomson
stuart.thomson@informa.com



Published by Informa Tech,
240 Blackfriars Road, London SE1 8BF
Tel: +44 (0)20 7017 5000
e-mail: tbi@informa.com **web:** www.tbivision.com
Printed in England by Walstead Roche Ltd,
St Austell, Cornwall PL26 8LX.

© 2022 Informa UK Ltd All rights reserved
Reproduction without permission is prohibited

Television Business International (USPS 003-807) is published bi-monthly (Jan, Mar, Apr, Jun, Aug and Oct) by Informa Tech, 240 Blackfriars Road, London, SE1 8BF. The 2006 US Institutional subscription price is \$255. Airfreight and mailing in the USA by Agent named Air Business, C/O Priority Airfreight NY Ltd, 147-29 182nd Street, Jamaica, NY 11413. Periodical postage paid at Jamaica NY 11431. US Postmaster: Send address changes to Television Business International, C/O Air Business Ltd / Priority Airfreight NY Ltd, 147-29 182nd Street, Jamaica, NY 11413. Subscription records are maintained at Informa Tech, 240 Blackfriars Road, London, SE1 8BF, United Kingdom. Air Business Ltd is acting as our mailing agent.

FILMRISE

VISIT US AT THE RIVIERA HALL R7 N9



@filmrisetv



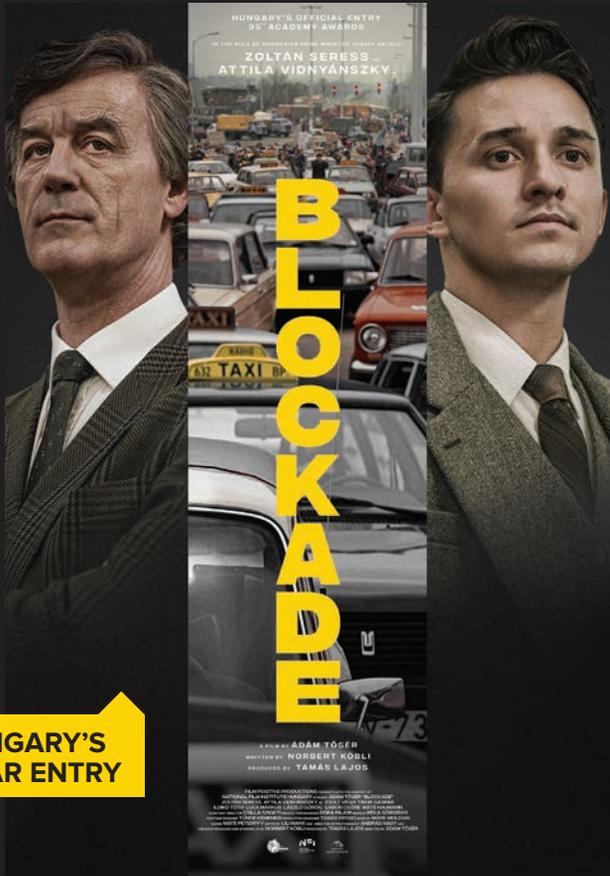
@filmrisetv



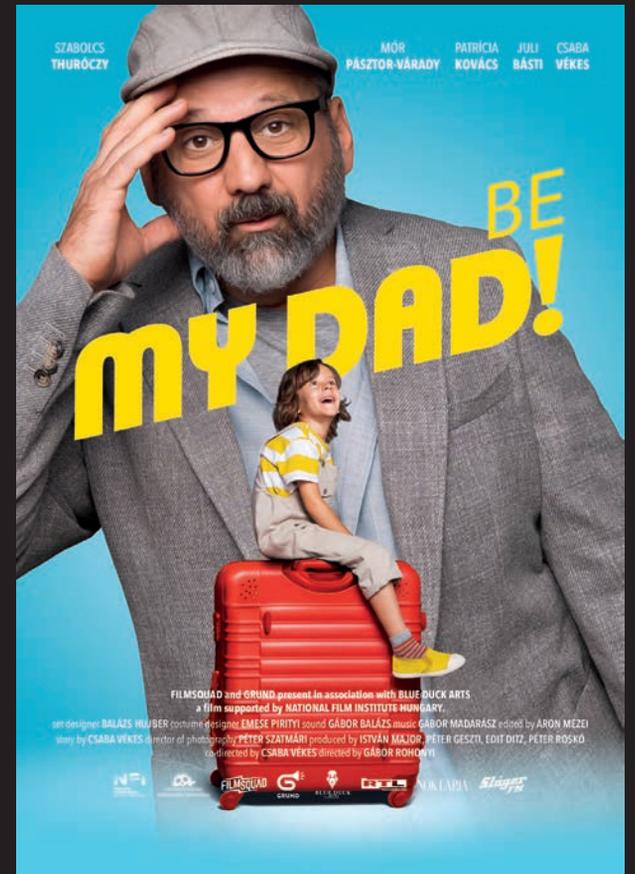
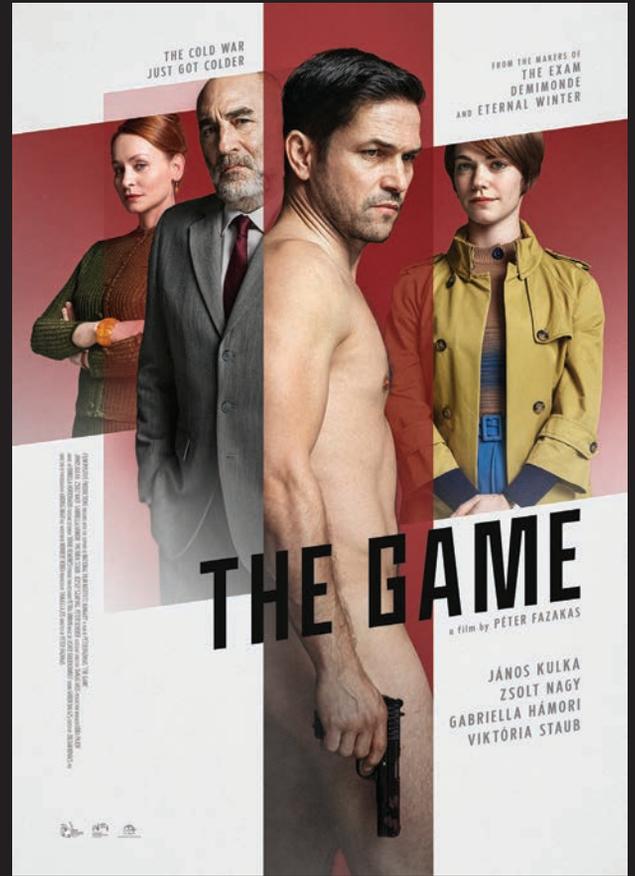
@wearefilmrise

For more information, go to sales.filmrise.com

mipcom
2022



**HUNGARY'S
OSCAR ENTRY**



NFI

**WORLD
SALES**

visit us @ P-1.J27



Diversity Deborah Williams

Securing gains

Deborah Williams reflects on recent positive diversity developments and urges the industry to maintain momentum

In the work we do, it's really important to acknowledge progress. We spend so much time focused on trying to fix the negatives that sometimes, we - myself included - don't recognise positive change. This month I want to reflect on that notion, while not forgetting how much we still have to do.

Over the last few months, I've been back out and about after two years of not attending international events such as MIPCOM or speaking to industry colleagues face-to-face about diversity. It has been clear that the work that has been done around race and ethnicity has had a real effect. At the Realscreen Summit in June, it was really motivating to see the number of black people and people of colour on panels or delivering keynotes and how far their presence changed the perspectives and conversations during their sessions.

Also in June, I was invited by Sanne Kurz of the German Green Party to attend the Bavarian Film Festival to talk about the race and ethnicity data that Collective Diversity Network (CDN) has been collecting through the Diamond system. What was interesting was how the conversation ended up being more around disability. I hadn't anticipated the presence of so many disabled people at the event, many of whom were focused on how to adapt and work with the diversity standards I designed for the British Film Institute back in 2015.

I have also been able to spend time with Amanda Upson, director of FWD-DOC, talking about the accessibility scorecard that is now being used by TV and film festivals to assess how accessible events are. I think that's a real sign of progress - making our industry more inclusive not just for participants already in the business, but for people who exist outside our little bubble in the UK and internationally. I'd like to thank everyone involved in making this happen.

Obviously, there's still a long way to go. We're

only scratching the surface when really, we need to be ploughing deep furrows. We must not fall into the trap of thinking that diversity entails adding some women here, some people of colour there and some disabled people somewhere else, then just continuing with the existing operating model plus these few tweaks.

My real anxiety is that as we return to life post pandemic, we end up forgetting much of what we learned during lockdown. I'm not saying that this is intentional - I get the feeling that everybody means what they say about increasing inclusivity and representation across production and the industry more widely. But are we in danger of slipping back into the old way of doing things rather than embedding some of the new ways of working we adopted, which were often much more inclusive - not just for disabled people but for many other groups as well?

I'm urging you all to stand your ground and push back when told something isn't possible, to say "hang on, during lockdown we did it this way and it worked". We need to make those changes permanent as we grow back. At CDN, we will continue to work with our members old and new, including the newly merged Warner Bros. Discovery and The British Sign Language Broadcasting Trust, to try to ensure this happens.

We have the data and I want to make sure that we are as transparent as possible as we think about what we can harness from the last two years, ensuring it is adapted and put in place as we move forward so that we don't lose anyone from the new community of people who were able to contribute to our industry's creativity during that period.

The 'new normal' has to mean something permanent rather than just a quick fix for a limited time period. Our job is leading and I hope that we are gaining and maintaining more followers as we continue our work. **TBI**

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

About Town

Calling Elvis

Baz Luhrmann provided a welcome addition to the Royal Television Society's London Convention late last month, proffering the assembled TV crowd with anecdotes about his younger days in Australia and his more recent experiences working with Tom Hanks on feature film *Elvis*.

As you'd expect, the Wear Sunscreen singer dished out gem after gem as he recollected his incredible career with Hollywood A-listers, as his innate ability to tell a good story translated itself from big screen to smaller stage.

All the notables from the UK broadcasting establishment were in attendance, with BBC chief Tim Davie providing insights into how the broadcaster covered the Queen's funeral, while the potential of augmented reality was also on show, via an app allowing a model's outfit to be magically altered on phones. Snazzy.

Warner Bros. Discovery (WBD) was this year's



sponsor and its EMEA chief, Priya Dogra, pulled in all the right names, including her boss Gerhard Zeiler, who discussed streaming, channels and his takeaways from Sky's marketing campaigns over the past decade.

Content from WBD's Black Britain Unspoken initiative provided some of the most meaningful contributions to the day's events, while a CNN session chaired by correspondent Nima Elbagir offered a sobering but hugely insightful reflection on the power of TV.

And last but not least, a dollop of deserved kudos for the drinks reception that followed, with suitably branded cocktails and plenty of tempura battered prawns going around - the best About Town has tasted for some time.



Spanish spotlight in Toulouse

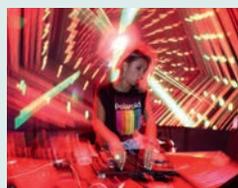
Animation From Spain was the focus this year as execs made their annual pilgrimage to the French city of Toulouse for Cartoon Forum.

Projects included *Bertie's Brainwaves*, from In Effecto Atlantis & Flickerpix, *Best Friends Forever... Stranded!* from Peekaboo Animation and *Zoey Oceans* from Studio Kimchi, all making the journey as artists and studios from the country were recognised.

A total of 80 animated TV series were presented at this year's event, with entries coming from 19 European countries, for a total budget of €367.2m (\$354.4m) representing 473 hours of animation. Phew.



Dancing in the streets



The 28th edition of The Sarajevo Film Festival again dealt out a stellar array of films and TV shows for industry folk and fans, with more than a week of premieres, screenings, talent sessions and panels. There were also wins for *The Last Socialist Artefact* in the Hearts of Sarajevo Awards for TV Series, with the show's Izudin Bajrović taking the lead actor prize. The Best Leading Actress in Drama Series was Ivana Vuković for *Awake*.

Swings & Roundabouts

5 HBO series *The White Lotus* scooped up five Emmy Awards this year, including outstanding limited series, while director and writer accolades went to creator Mike White for his work on the show

4 Amazon's Prime Video streamer commissioned four new local versions of Banijay's reality format *The Bridge* in September – all for Nordic countries; Sweden, Norway, Denmark, and Finland

\$12 Warner Bros. Discovery's share price stood at just under \$12 in late September (down from \$25 in April), but CEO David Zaslav was quick to firmly rebuff any 'for sale' talk

\$200m Denmark's production industry is bracing itself for losses of up to €200m (\$200m) as the stalemate over rights payments from streamers, including Disney+, Viaplay, Prime Video, TV2 Play and Netflix, continues





Tech & Analysis Ed Ludlow

The best of both worlds

Omdia's Ed Ludlow explores how Amazon has been ahead of the game in regards to AVOD

While global streamers such as Netflix and Disney+ are readying themselves to add AVOD tiers to their services, Amazon has been doing this for some time – offering such an option since 2019.

Originally known as IMDb Freedive, then IMDb TV, and finally Freevee, the ad-supported option first appeared in the US as a carousel on the site alongside Amazon's SVOD offering, Amazon Prime Video, before also launching its own standalone app. It has since been rolled out internationally, in the UK in 2021, and in Germany in 2022.

In the US, Freevee supports both on demand viewing with ads (AVOD), as well as FAST channels (pre-programmed linear feeds, designed for web-based streaming).

AVOD has become a much-discussed topic recently, with Disney+ announcing an ad-supported tier to launch in the US later this year and Netflix widely expected to be planning the same. However, in contrast to Disney's ad-supported option, which will offer the same content to its subscribers but for a reduced rate, Freevee operates as a separate service to Amazon Prime Video and can be accessed without a Prime subscription. It has a unique content catalogue, though there is some overlap.

As of Q2 2022, 1,922 titles were available on both IMDb TV and Amazon Prime Video.

With the rebrand of IMDb TV to Freevee, Amazon dramatically increased its AVOD offering, from 2,020 titles at the end of 2021, to 9,451 titles now.

At the beginning of 2021, Amazon massively reduced its Prime Video SVOD library in US, cutting the number of titles from over 50,000 at the start of the year to a low of 6,930 in Q3 2021, before steadily increasing volume to 10,127 titles by Q2 2022.

During the 2021 purge, Amazon removed many of the less popular library titles from its SVOD catalogue as well as lots of user generated content which came to the service through its Video Direct offering. This had previously allowed independent filmmakers to upload their content to the site, either included for free with a Prime subscription (for which the creator would receive a royalty for video views), or through digital purchases or rentals.

Omdia has found that many of the titles which were removed from Amazon Prime Video's catalogue at the beginning of 2021 have eventually ended up on Amazon's AVOD platform. By Q2 2022, 5,176 titles on Freevee had been available on Amazon Prime Video before the cull. This means that titles from Amazon's SVOD catalogue in Q1 2021 represent 54.8% of Freevee's overall catalogue.

Our research partner, MediaBiz, tracks the IMDb rating of titles on SVOD and AVOD platforms. The IMDb rating is a weighted mean score of critic and user-generated reviews of films, on a scale of one to 10. According to these reviews, titles on Amazon Prime Video are of better quality, with a higher average rating (7.3/10) than those on Freevee (5.6/10).

While most of Amazon's original content has so far been launched on Prime Video for paying subscribers, it has experimented by releasing some original titles on Freevee. This includes *Love Accidentally*, a US romantic-comedy film that was launched in July 2022, as well as the police-procedural series: *Bosch: Legacy* (2022, pictured), a spin-off of the Prime Video original series, *Bosch*, which ran from 2014-2021.

Amazon houses more recent releases on its Prime Video service: 17.4% of titles on Prime Video have been released since 2020, whereas only 5.7% of titles on Freevee have launched since then. Prime Video also dedicates a larger proportion of its catalogue to film titles (76.6%) than Freevee (62.8%). **TBI**



Ed Ludlow is senior data analyst at Omdia, the research arm of TBI owner Informa



New

Legal Julian Wilkins

Lovely jubbly

In his first TBI column focusing on the legal side of the content business, consultant solicitor Julian Wilkins reveals how a recent case around IP could have far-reaching implications

BBC sitcom *Only Fools And Horses* might have broadcast its last episode almost two decades ago, but that hasn't stopped Del Boy and co from having their day in court.

The Intellectual Property Enterprise Court case of *Shazam Productions v Only Fools the Dining Experience* [2022] EWHC 1379 IPEC is notable for stating for the first time in English law that copyright can exist separately in a character and not only the script. The case concerned copyright infringement of John Sullivan's genius writing of *Only Fools And Horses* (OFAH) quoted throughout the judgment.

In short, Del Boy has made legal history.

Shazam Productions Limited (Shazam) was formed by the late John Sullivan, who owned the rights to the OFAH scripts. His family continues to licence those rights, for instance to the BBC, which had originally produced the TV series, and for a successful West End theatre version of OFAH.

The Dining Experience and others had created a theatrical experience for its audience by providing an interactive three-course meal, while actors played the characters of Del Boy and his young brother, Rodney. The actors had the appearance, behaviour, voice and phrases of OFAH characters.

Although the Dining Experience created a script, it used jokes from the original series. The characters were also replicated, albeit, according to the defendants' evidence, in an exaggerated way. The Dining Experience also used the music and lyrics written by Sullivan from the OFAH TV show.

The judge analysed recordings of OFAH whilst reading their scripts. Although the scripts were acted by a stellar cast, the character development was clearly set out on the page. Sullivan's scripts served as a diecast for the distinctive characteristics of the characters, especially Del and Rodney Trotter. With Del Boy, there was the mispronounced French and stock phrases such as 'Lovely jubbly' and 'Cushty'. The character was indiscernible from the script and its dialogue.

The characters were not clichés or tropes either, but fully rounded with their DNA set out in the writing.

The thoroughness of the characters was such that the presiding judge was satisfied the character was a literary work for copyright purposes.

The judge did not create new law but applied it for the first time in England by following the test for subsistence of copyright identified in European Union (EU) law. This is a two-prong test fulfilling the 'originality requirement', namely being the author's own intellectual creation, and 'identifiability requirement', whereby the character manifests itself in an identifiable manner that is objectively unique and distinguishable from another character. Although an EU law test, it pre-existed Brexit so remains part of English law.

Further, the court determined Del Boy's character was a literary work under UK copyright law, which has a closed list of works that can be subject to copyright. As an aside, the EU test of subsistence of copyright law (still valid UK law) does not allow a closed list as exists under UK copyright legislation.

The Shazam case demonstrates that careful character development and embedment within scripts may create an additional copyright in the character, separate from the overall script. Rights-holders of the most identifiable fictional icons from TV may wish to consider whether copyright exists in their characters.

Apart from copyright protection, the Shazam decision lends support to a 'passing-off' action where the copyright owner asserts their goodwill associated to a character. Therefore, any unauthorised attempt by a third party to portray a character may be regarded as passing off by giving the impression their use was endorsed by the copyright owner.

There may also be circumstances where a distinct character can enhance the existence of format rights, normally a ragbag of detailed rights and creations such as set designs, trademarks and intricate format bibles assiduously recording the facets of a show.

So there it is. Character-led drama and comedy create not only masterpieces but additional IP rights, if your characters display sufficient distinctiveness.

Lovely jubbly. **TBI**

Julian Wilkins is a UK-based consultant solicitor and notary public with Eldwick Law, plus a founding member of mediation and arbitration practice Q Chambers

DIANE
KEATON

TAYLOUR
PAIGE

ELIZABETH
LAIL

OLD SOUL. NEW AGE.

Mack & Rita

© 2022 Mack & Rita, Inc.



FIGHT
OR DIE

ANTONIO BANDERAS JAIME KING TOMMY FLANAGAN

BANSHEE

© 2022 Banshee The Movie, LLC



KEIRA KNIGHTLEY MATTHEW GOODE ROMAN GRIFFIN DAVIS ANNABELLE WALLIS LILY ROSE DEPP

A FILM BY CAMILLE GRIFFIN

SILENT NIGHT

© 2022 SN Movie Holdings Ltd.



SPI
A CANAL+ COMPANY

HOME OF
GREAT ENTERTAINMENT

→ VISIT US AT MIPCOM BOOTH R8.C17

www.spiintl.com

contentsales@spiintl.com

View from the top

From questions over linear's decline to streaming's subscription problems and furious FAST growth, the fluxing nature of the content industry is constant and global. To explore what's next, TBI hears from decision makers at RTS London to find out how their organisations are adapting and where they believe the industry is going next



All images: Richard Kendal/RTS

Gerhard Zeiler, international president, Warner Bros. Discovery

It has been a transformative 12 months for Warner Bros. Discovery (WBD), which was not even in existence at last year's MIPCOM. Back then, WarnerMedia was touting HBO Max's global roll-out and Discovery+ was talking up its local content push. Since then, HBO Max's roll-out has been stopped in its tracks and a combined offering with Discovery+ is set to hit the market in 2023.

For Gerhard Zeiler, WBD's international president, that roll-out is inevitably the key focus but the specifics around its implementation remain somewhat unclear.

“When you tell stories so many ways it makes sense to have

a distribution strategy that is broad based,” he says. That means “100% yes” to theatrical, plus a focus on streaming and networks, while also increasing sales to third parties.

“We'll focus on the development of our franchises – yes, we have an incredible slate already from *Harry Potter* to *Game Of Thrones*, but we need to develop more,” he adds. And despite originals teams across Europe being cut, local remains key. “Big hits will still be the *Mad Mens*, the *Successions*, the *Euphorias*, the *House Of The Dragons*, but to be a top-three player you need to complement these stories. Maybe not in every market of the world, but in a lot of them.” One of those will be the UK, WBD's biggest market behind the US, where production investments are being explored by All3Media, jointly owned with Liberty Global.

Maria Kyriacou, president of Australia, Canada, Israel & UK, Paramount International



Another US giant fresh from a mega-merger, Paramount has arguably led the broadest charge when it comes to securing viewers on whatever platform they may be. Aply assisted by the acquisition of FAST operator Pluto TV, Paramount International's president of Australia, Canada, Israel & UK, Maria Kyriacou, says despite the current macroeconomic issues affecting countries around the world, streaming offers "a growth" area.

"We've just gone through the most disrupted period of audience and market behaviour [with the pandemic], so a certain amount of adjustment should be expected," she adds. And while some streaming chiefs have been busily predicting the imminent demise of linear TV over recent months, the Paramount exec says they "will continue to be wrong," handy because networks such as Channel 5 in the UK and Australia's Network Ten fall under her remit. "We have to make most of our differences and Channel 5 is key. Although we have a lot of programming from Paramount+ [in the US] coming up, I'm really looking forward to our UK shows," she says, with local series including a reboot of the group's feature, *Sexy Beast*, for the streamer.

Despite this, Kyriacou admits that the biggest growth is coming from emergent services - namely ad-supported - such as Pluto TV. And the appeal of FAST is clear, she says. "It's based on the comfort of pre-existing brands and shows you already know," Kyriacou continues, describing the amount of viewing taking place in the US as "shocking". "Once you're there and find how easy it is, you stay."

Stephen Van Rooyen, EVP & CEO, UK & Europe, Sky



Few players across Europe have been sinking as much investment into original content as Sky, with around 200 originals unveiled earlier this summer to engage its customers. The reason was clear enough, with many of the providers of its content - namely, the US studios - cutting their third-party sales, although that trend is now shifting.

Whether Sky will secure HBO shows from Warner Bros. Discovery following the end of its 2025 deal remains to be seen, but the company has already made huge strides to ensure its platform can act as an entry point to others' content - Netflix, Paramount+ and Discovery+ are all available via the provider, for example.

The key for Stephen Van Rooyen, Sky's EVP & CEO, UK & Europe, is to make the viewing experience as easy as possible while ensuring its content provision is broad - with regional content across its footprint a key part of the strategy.

"In local markets, local stories pop," says Van Rooyen. "But of course it's not a zero sum game, it's important that you have both *House Of The Dragon* as well as *This England*," he adds, highlighting the Comcast-owned company's broad WBD deal with its own dedicated originals. "It comes down to the economy you live in and if you look at the data, you will identify your need to invest in local productions. Peoples' lives in the UK are different compared to those in France or Germany or the United States," he adds. It is that combination that makes it such a "vibrant" time for production, the Sky exec adds.

Ben McOwen Wilson, MD, Google Play EMEA



Adapting to consumer demands has helped Google-owned YouTube surge among its users, despite having culled almost all of its big budget commissions several years ago.

The future for Ben McOwen Wilson, who recently left his role as YouTube's EMEA chief to become MD of Google Play EMEA, is making consumption as frictionless as possible.

"I don't think we can take comfort from the 'linear TV is fine' adage," he says, adding that broadcasters and streamers have to ensure it becomes easier to find the show they want on whatever screen they use.

He also points to the surging potential of user generated content (see more about this on page 102) and also highlights YouTube's less-discussed move into SVOD via its music service, which now claims 50 million subscribers worldwide.

Wilson adds that there is "a sea change" in terms of how YouTube is viewed by rights holders, particularly broadcasters,

which are now using the service to tap into younger audiences.

"Kids is a great place to start, just look at *CoComelon*, which began there - that content is still on YouTube, but also on BBC in the UK, Amazon Prime Video, Netflix. Historically, that would have made no sense at all, but here in 2022, it's the world we're in."





Jan Koeppen, president, The Walt Disney Company EMEA

Despite surging global streaming subs, The Walt Disney Company’s president of EMEA Jan Koeppen remains “very bullish” about building further on its growth as it looks to deliver content broadly with brands ranging from *Star Wars* and Nat Geo, to FX and ABC Signature. Part of the reason for that, says Koeppen, is because there are swathes of the world where streaming uptake has room to grow.

“Timing is always complicated to predict, but if you look at stacking ratios or SVOD penetration in Europe, we are quite far

behind some more advanced markets such as the US – there’s a lot of room to grow.” Economic uncertainty will drive consumers to quality, he continues, adding that his company is using its experience with Hulu in the US to develop a global advertising-supported offering for its Disney+ offering. “[Hulu] has been going for years and it hasn’t ruined the broadcasting business at all. It works well and has proven they can co-exist.”

And while the Mouse House has shuttered channels in some parts of the world – notably the UK – Koeppen was quick to dispel any idea that it was a global strategy.

“Across EMEA we still have hundreds of channels. If in a particular market it’s not profitable that’s one thing, but our linear businesses are alive and kicking. In the UK, the economics just didn’t work out.”



Carolyn McCall, CEO, ITV

ITV believes the UK commercial broadcaster can defend itself from the predicted impact of a recession via global growth of ITV Studios (ITVS) and soon-to-launch streamer ITVX.

The UK company has been buffeted over the past six months since unveiling details around its ad-funded ITVX service, with shares plummeting after it revealed plans to spend a further £160m (\$172m) on new content for the service.

CEO Carolyn McCall admits she does not understand why markets performed such a “mechanical downgrade”, but adds that ITVX will provide huge potential for the broadcaster alongside its channels business. “The reason we didn’t take any money from the channels is because all those channels are doing well and they are all profitable,” she says.

“We still get big numbers – six, seven, eight million viewers for events such as the football. So we have this fantastic ability to do both things. ITVX is AVOD led so we can monetise it... we can do highly targeted advertising and we can do it very well.”

The streamer will also provide more production potential, with more niche programming set to find a home on the service – six comedies are already in the works. All eyes will be on the reboot of *Big Brother* too, which hasn’t been on air in the UK since Channel 5 cancelled the format after a two-year run in 2018. It had previously spent a decade on Channel 4, ending in 2010.

Amid an uncertain economic background, McCall also downplayed fears that the launch of ad-funded services from previously SVOD-only players such as Netflix would impact its own operations, with money still going predominantly to “primary broadcasters”. If anything, the broader advertising market could be buoyed by the launch of new ad-supported tiers of programming.

The ITV CEO adds that SVOD will continue to contribute around 10% of revenues but production division ITVS will grow “in absolute terms and as a percentage within ITVS”, with the division currently bringing in 50% of revenue.

Alex Mahon, CEO, Channel 4



For Channel 4, the change of government in the UK has, for now, quelled the rush to privatise the public broadcaster. CEO Alex Mahon admits that “quite a lot has changed” over recent months but admits that just what the new regime will decide to do with the organisation remains to be seen. “I imagine they’ll look at the evidence and we’ll see what comes,” she says, adding that dealing with multiple culture ministers has delivered “a high degree of ambiguity.” But, the former Shine CEO adds, “C4 is good in situations like that, although it’d be nice to know where we are.” C4’s ad-supported service, All4, remains a key play for the broadcaster despite a turbulent advertising market and Mahon points to the “brand safe environment” as a key differentiator for TV compared with other media.



Tim Davie, director general, BBC

Hit by declining consumption among younger demos, surging competition from streamers and a squeeze on funding, the BBC’s CEO says global division BBC Studios can continue to grow its annual revenues from July’s £1.6bn (\$1.77bn). However, don’t expect the commercial arm to be able to carry the weight of the organisation, he adds. “The profit off the back of that is a decent margin but to subsidise and take over from the licence fee... do the maths.”

How the BBC will be funded remains to be seen but in a world where licence fee payments are disappearing (see page 32), the annual charge remains the “least bad option,” the former BBCS CEO says. “Look at any organisation - everybody is going through huge change.” **TBI**

Mariupol. UNlost Hope.
Current Affairs | 52'



New Space - The Race is back on
Science & Technology | 52', 45'



Grip
Factual Entertainment | 12x52'

Meet us @ MIPCOM: R7.F2

The home for aut(h)entic stories. www.autentic.com





TBI Distributor's Survey 2022

From the US, India and Germany, to Brazil, the UK, Spain, Canada and numerous others in between, the TBI Distributor's Survey 2022 is the most extensive exploration of the global sales business, representing catalogues of close to one million hours of programming. Join us as we explore what's changed over the past 12 months and where we're headed next

Twelve months is a long time in TV. Rewind to last year and the industry was staggering somewhat uncertainly out of the pandemic as production hiatuses and inflating costs hung over the entire business. AVOD was being touted as the next big thing, FAST was rapidly emerging as the real deal Stateside and unscripted programming was driving returns. So what's happened since?

Many of the same trends are still in play, but changes in the way that US studios do business are beginning to make their presence felt for distributors everywhere – for better and worse.

Scripted: Strengthening relationships	21
Unscripted: Keeping pace	23
Formats: Tried & tested	26
Kids: Storming the library	28
Conclusion: Windows of opportunity	29

Scripted: Strengthening relationships

The picture looks positive for the scripted sector, which has seen increased revenues and streamer demand, while crime dramas, thrillers and relationship-focused shows have flourished

There is little doubt that scripted product remains the major driver for those looking to cut through in the increasingly tough world of streaming. For distributors working in this part of the business, it has been another tumultuous year as the worries of production pauses caused by Covid-19 gave way to ever-increasing costs as the price of talent in front and behind the camera rose.

The bottom line

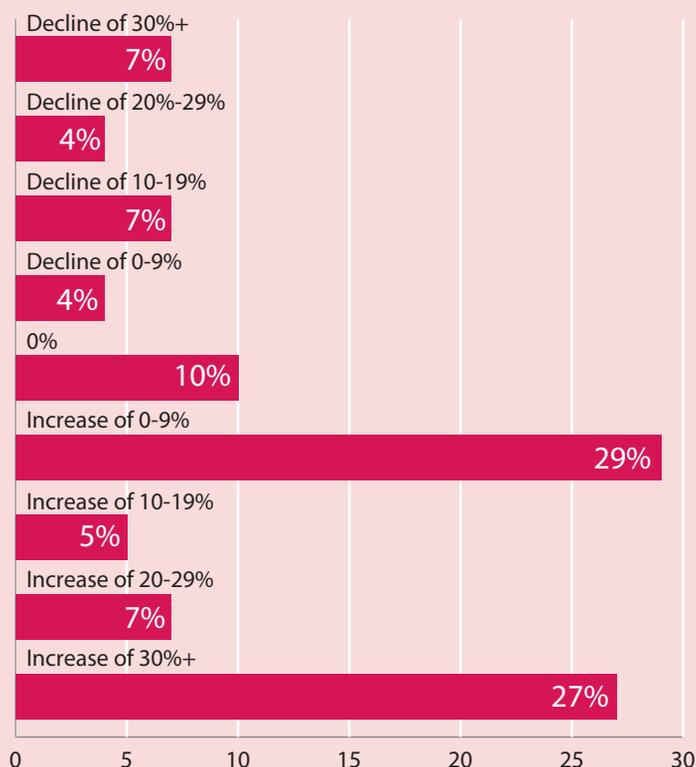
Yet talk to most execs working in the world of scripted distribution and it has been a similar message through the year: things are looking pretty good. That is certainly reflected in some of the standout figures from this year's Survey, with almost a third of respondents reporting that revenues increased by 30% or more. The picture further down the growth pyramid remained steady too, with a combined 12% of respondents experiencing revenue increases of anywhere between 10% and 29%, while a further 29% said that revenues had increased between 0% and 9%.

AVOD continues to be one area to watch for the bean counters, with 15% of respondents claiming it contributes more than 50% of their overall revenue. In the main, however, this area of business remains a small but growing percentage of the overall pie, with more than half (55%) of respondents reporting that it contributes around 10% of overall revenue.

While revenues overall were up, dig a little deeper and the impact of surging costs is clearly affecting the bottom line. Profits remained buoyant for most respondents, although 48% reported growth of between 0-9% on last year, while only 11% saw profits rise 30% or more above their 2020/21 figures, in contrast to the revenue numbers.

Despite this, optimism shines through many of the findings. Only 8% of respondents said they expected to cut staffing over the next 12 months, with the majority (65%) expecting their workforces to remain steady. A noteworthy minority – 21% – said they expected staffing levels to increase by 30% or more, while 85% of respondents said they believe the market will improve over the next 12 months.

How much did your annual revenue increase or decrease between 2020/21 and 2021/22?



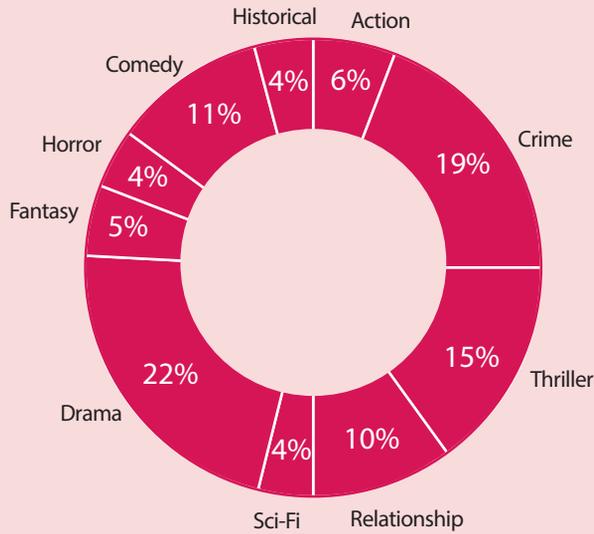
85%

of respondents believe the market will improve over the next 12 months

A further 92% reported that their catalogues were larger than 12 months ago and there were yet more signs of surging competition for product, with 82% of respondents financing scripted series earlier than ever before. Drama and crime emerge as the killer genres – both received the most votes from respondents answering which genres were selling best (with respondents allowed to pick multiple genres).

The Survey also reveals, however, the breadth of demand for programming from buyers. Crime stood out, but thrillers were also key sellers, while relationship-focused series gained votes from almost 70% of respondents. Comedy has also seen an uptick, but sci-fi, horror and historical series have performed less well, respondents said.

What sorts of shows are selling best for you?



Threats & potential

While distributors, in the main, seem to have experienced a buoyant 12 months on the scripted front, the ongoing challenge are delays, respondents said, with almost 40% putting this issue among the key problems they face.

Other areas of concern include off- and on-screen talent shortages and cost, while the preference for global rights from select SVODs continues to affect distributors, with this issue being highlighted by 29% of respondents (who were again allowed to pick multiple options). Perhaps inevitably, there was also disquiet around the accessibility and control of rights, while market consolidation and risk aversion from broadcasters were also cited as factors that could affect the coming 12 months.

Another area that looks set to dominate 2023 is the surge of FAST channels. At present mainly the preserve of North America, there are clear hopes that broader global appetite for ad-supported linear channels will fuel this emergent window with 71% of respondents putting FAST buyers among those expected to grow over the next 12 months. And despite the rapidly evolving nature of global streamers, almost 65% of distributors believe this category will also continue to grow over 2022/23, with local pay-TV and local public broadcasters languishing lower.

Geographically speaking, much of the demand will likely come from North America, which was the overwhelming answer from distributors when asked where they are seeing most business. Australia and India were also regularly cited as countries to watch as demand rises, with countries across Europe and Lat Am

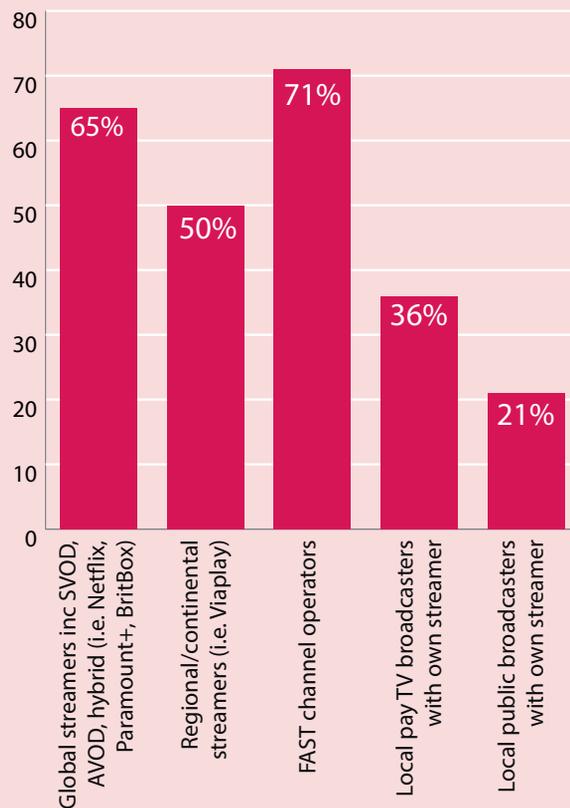
among others noted.

Looking further ahead and Stateside – and reflecting the somewhat uncertain nature of the market at present – only 35% of respondents said they expected US studios to make more product available to third-party buyers over the next 12 months.

And just where all this buying and selling might be happening is also unclear. MIPCOM was the stand-out winner on the event front with 85% considering it must-attend, while MIPTV stood at 41%. NATPE's upcoming event in the Bahamas (formerly in Miami) is also proving popular with 55% preparing to attend. Others in the diaries include Conecta Fiction, Edinburgh TV Festival and the Berlin International Film Festival, among numerous others.

Dialling further into travel plans, the breakdown of companies expecting to attend more physical events in 2023 compared with 2019 was around 28%, while 32% said they expected to attend a similar number. The remaining 40% said they would attend fewer events, underlining the ongoing transition that the industry is still navigating.

What type of buyers do you expect to grow in number over the next 12 months



Unscripted: Keeping pace

While docs have been enjoying a period of growth for some time, the sector may become a victim of its own success as the cost of production begins to rise, creating drag on the returns reported by distributors

With the cost of scripted productions soaring in price, those operating on the unscripted side of the business have found rich pickings among streamers and broadcasters looking for less budget-heavy fare.

Flick through the carousels of almost any streamer and the rise of unscripted programming is immediately apparent. From tentpole docs that can grab the attention on social media and newspaper headlines, to the consistent demand for premium factual entertainment programming, it hasn't been a bad couple of years for many unscripted distributors.

Yet there are signs that the good times are beginning to come to an end, or at least a deceleration. As demand for premium docs and docuseries has soared, for example, the allure of A-list talent to front shows has never been greater. This is in turn pushing prices up and making returns for distributors a more complicated affair.

Revenues & returns

While that may be the case, the revenues being reported to this year's Survey suggest that 2021/22 has been a positive 12 months for most. Just over 40% of distributors working in the unscripted space reported rises of 30% or more, while a further 17% said they had experienced growth over the past 12 months of between 10-19%. Just under a quarter said revenue growth stood at between 0-9%, while there were declines of between 0-9% for 7% of respondents, but none of the companies involved recorded a decline greater than 20%.

Following a similar pattern to those operating in the scripted sector, profits did not rise in tandem with revenues. However, it was another largely positive story for most companies' bottom lines, with 17% reporting an increase of 30% or more on 2020/21 and 7% recording a rise of between 20-29%.

In part, this could be down to the impacted profits of distributors last year when pandemic costs hit some businesses hard. And while some companies saw profits surge, the majority reported incremental rises with almost half recording similar profits to last year or growth of between 0-9%.

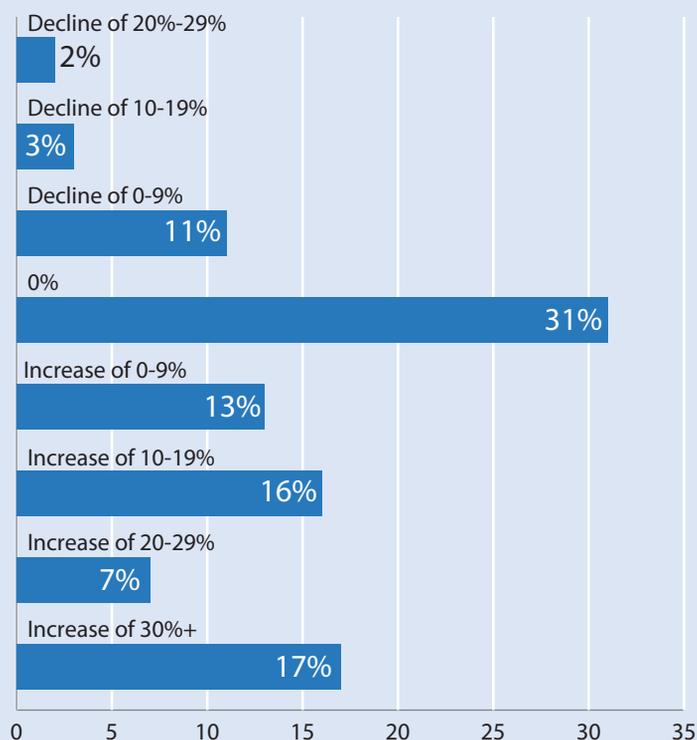
There are also fewer expectations for rapid expansion on the staffing front, according to the results, with more

than half of respondents claiming that they expect levels to remain static over the year. Companies experiencing growth, particularly some smaller outfits, are more optimistic with 13% believing their staffing levels will rise by 10-19% and 9% expecting their workforces to increase by up to a third over the next 12 months.

There was more certainty from respondents that the market would improve over the next 12 months, with only 6% expecting things would get worse. Catalogues are also getting bigger, with more than 90% reporting that shows on their books had increased in number.

Doing the business on the genre front, meanwhile, was true crime. More than half of respondents put shows from this genre among their best sellers, while history programming also outperformed many expectations and secured the votes of 48% of distributors (who were able to pick multiple genres).

How much did your annual profits increase or decrease between 2020/21 and 2021/22?



Evergreens such as cookery and travel remained buoyant, with a respective 25% and 32% putting shows for these genres among their best sellers, while reality claimed the votes of 36% of companies.

Growth over the past year, meanwhile, has come largely from the US according to the Survey's findings, with European buyers and those in Japan also cited as showing particular demand. And despite the increase in interest for unscripted, there was a similar number of companies claiming to be financing unscripted series earlier than ever before, while 56% of respondents said they would not finance a show without a commissioning broadcaster or streamer.

Off-screen challenges

While streamers have provided much of the fuel for the surging interest in unscripted, there remain challenges with the global operators' rights models, which were cited among the major challenges by respondents (who could pick multiple challenges). Yet while these have been factors at play for some time, the surging cost of production was in evidence as the cost of off-screen talent and associated shortages surged to prominence among the challenges facing the unscripted industry.

Production delays were also cited as a major



of respondents said they would not finance a show without a commissioning broadcaster/streamer

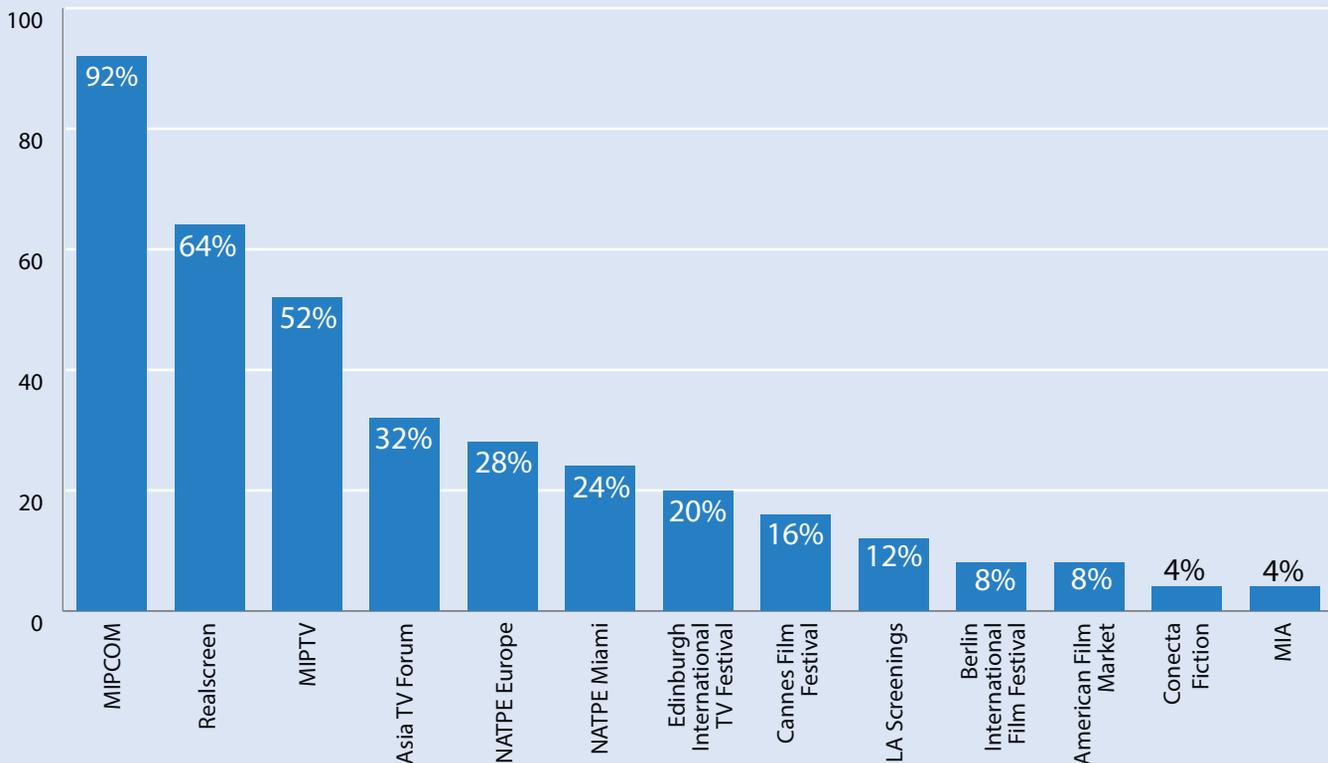
problem facing distributors, although many pointed that the pandemic-induced problems were beginning to dissipate.

Market consolidation has also been causing headaches, respondents said, while buyers keen to play it safe helped to drive 'risk aversion' to new heights as well. Just as well then that respondents seem to have overwhelming confidence in the growth of buyers over the coming year, with global streamers among those predicted to be increasing their demands. However, again, it is the acquisition activities of FAST channel operators that are predicted to offer the biggest growth potential, as expansion across North America begins to be felt more widely around the world, providing a flurry of new windows for rights holders.

Certainly, the prevalence of ad-supported viewing is growing but while distributors are predicting big things, revenues from AVOD remain at relatively low levels. Almost 30% of respondents said AVOD represented between 10% and 25% of their overall revenues, while a further 42% put it at just 10%.

FAST remains largely a nascent area of business for many and the vast majority (73%) of respondents said it contributed around 10% of overall revenue in 2021/22. How that will change over the next 12 months will be fascinating to watch.

What markets do you consider must-attend?



Rights, royalties, and everything in between

Discover the most comprehensive IP platform built to simplify and maximize your IP Commerce.

Address complex workflows with the industry's leading rights and royalties product suite designed to enable efficient commerce along the entire IP supply chain.



Contract Lifecycle Management



Royalties & Participations



Rights & Availabilities



Financial Accounting

www.rightsline.com

rightsline™
Be Intellectually Powerful

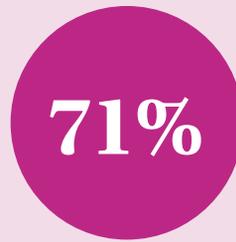
Formats: Tried & tested

Pandemic-related problems made life easier for many format outfits but despite an uptick in demand for adventure shows, buyers are becoming more risk-averse, with familiar titles dominating the past 12 months

Cost-effective and, at times, a less risky proposition than a truly original commission, the format business continues to adapt to the rapidly evolving ecosystem and the myriad demands put on it by both traditional linear networks and younger streamers.

There is little doubt that the strength of tried and tested formats remains strong, with the big groups continuing to enjoy stellar results with ideas that are decades old.

Indeed this has caused consternation among many creatives in the business, with several events of late dominated by issues around the reliance on old IP being reworked for the next generation or, in many cases, possibly the same folk who have just got a decade or two older.



71%
expect their staffing levels to remain the same over the next 12 months

This sector, unlike scripted and unscripted, has not secured the same levels of growth over the past 12 months, but most distributors reported that their revenues had risen. A notable 16% said revenues had dropped by up to 19%, potentially down to the cyclical nature of the format business, but 67% said they had seen increases of between 0-9%. Profits followed a similar pattern, with 79% reporting either no increase or an increase of 0-9%.

Patterns & trends

Trends in formats tend to move in cycles until something revolutionises the market, but with no such show doing that over the past 12 months - or for several years before that - it has been the stalwarts of dating, adventure and competition that have been fuelling format distributors' sales books.

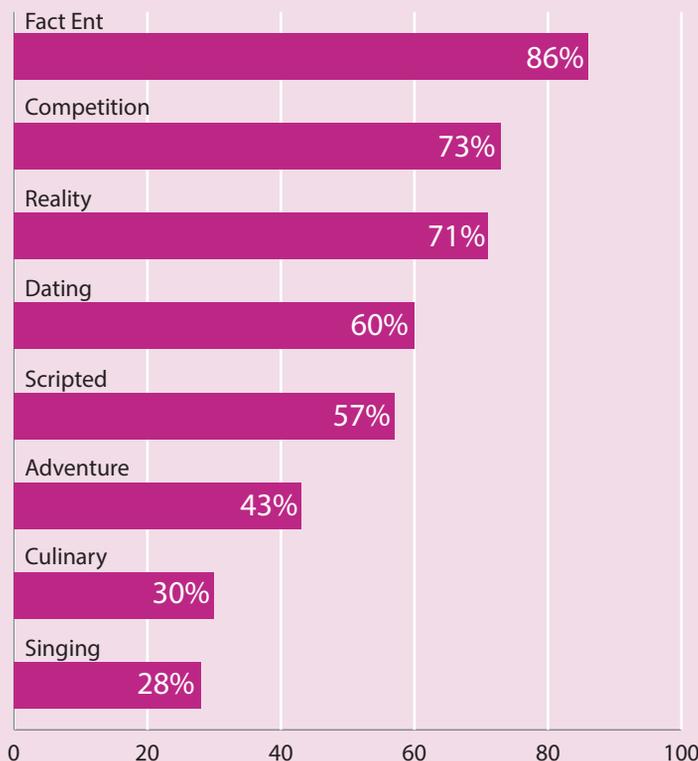
With the pandemic largely halting international travel over recent years, there has been a noticeable uptick in demand for adventure formats as the world has again opened up. Although some of the bigger groups managed to produce through the various travel restrictions, a return to normalcy saw adventure formats voted as best sellers by 43% of respondents (who were able to pick multiple genres).

However, it was factual entertainment and competition that have proven to be the biggest sellers for format companies this year, with 86% and 73% of respondents respectively putting shows from the genres among their key performers.

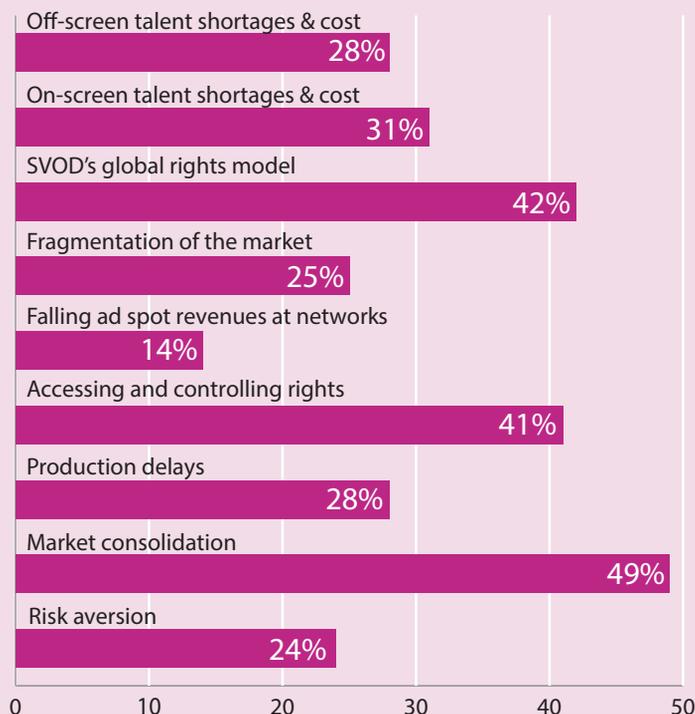
Culinary hits fared less well, perhaps surprising given the success that market leaders such as *MasterChef* have found in returning to screens around the world. Spin-offs of these cookery delights have also become popular.

There was a noticeable uptick in the performance of scripted formats, with 37% of respondents placing drama remakes into their best-sellers. Perhaps underlining the risk aversity of the market right now, this trend suggests there is also value to be had in buying into scripted without the need for costly and time consuming development processes to get scripts to a serviceable state.

What sorts of formats are selling best for you?



Which of the following issues has provided the greatest challenge for format distribution over the past 12 months?



a geographical point of view, demand is coming from Latin America and the US, according to many respondents.

Intriguingly, more than half of respondents said they expect to visit fewer physical markets over the course of 2023 than they did in 2019, although there remain a slew of 'must-attend' events. These are led by MIPCOM, but perhaps reflecting the interest from Latin American buyers over the past year, NATPE's January event is also seen a key date in the year, along with The Asia TV Forum.

Keeping one eye fixed on the future, none of the distributors that took part in the survey expect their current revenues to drop in the next 12 months. In fact, 14% are estimating growth of 10% to 19%, with a further 71% eyeing a more moderate bump of between 1% to 9%.

It is perhaps no surprise then that a unanimous 100% of Survey respondents said that they believe that their businesses will improve in the next 12 months. Similarly, almost every respondent reported that their catalogues had grown over the past year, although broadening out the demand for newer formats continues to be a considerable challenge amid global economic uncertainty.

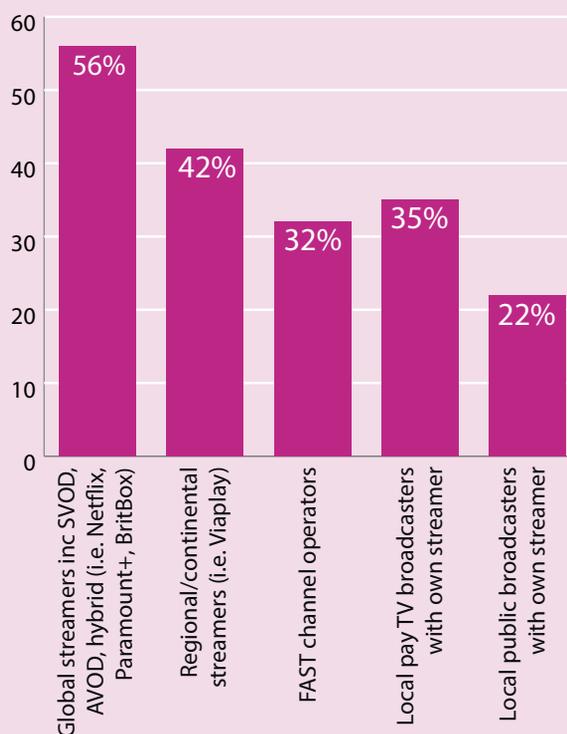
Costs & opportunities

In the rather unique world of format distribution, the challenges tend to be different from those operating elsewhere. However, the inflationary costs of both off-screen and on-screen talent were highlighted by respondents, although it was market consolidation that secured the most votes from respondents. Almost half said that this issue had proven to be the biggest challenge of the past 12 months.

There was a belief, however, that the number of buyers would increase over the coming year, with the global streamers providing the biggest opportunity. Respondents, who were able to pick multiple options, also believe that regional streamers such as Viaplay will offer more potential for their format offerings over the coming months, with 42% of respondents outing their faith in this part of the market expanding.

Opportunities for growth from established local pay-TV broadcasters are predictably lower, although 22% of respondents said they had seen an increase in buying from local public broadcasters, despite this area of the market often already well established within the format community. From

What type of buyers do you expect to grow in number over the next 12 months?



Kids: Storming the library

US studios' changing approach to children's & family content has created plenty of opportunity for distributors able to open up their catalogues and fill gaps, while all eyes are on FAST as the potential next big thing in the sector

The kids TV industry has arguably never been as vibrant nor as important to the activities of global streamers, many of whom are investing in new programming and acquisitions to ensure their services provide sufficient eye-catching content to keep kids entertained and the bill payers happy.

Nevertheless, the industry has faced a turbulent three years as the pandemic saw soaring demand for content as buyers looked for programming that could entertain and educate locked-down viewers.

There has also been a reduction in the amount of programming available for both channels and streamers as the US studios have locked in content. While in some areas of the industry that strategy may be changing, it seems that many key kids shows are being retained to a considerable extent.



of respondents expect global streamers to grow in number over the next 12 months

For those in the distribution game, this means opportunity aplenty, as broadcasters and streamers look for content to plug gaps. There are also myriad avenues emerging on services such as FAST, as the Survey findings show.

Reeling in revenue

For the companies that took part in this year's Survey, revenue over the past 12 months was up on 2020/21 across all fronts, with almost two thirds reporting increases of between 0-19%, while profits largely followed suit.

However, 63% of respondents said they did not expect the market to improve over the next 12 months, with factors such as global streamers' all-rights models causing issues. Other challenges cited by respondents include the fragmentation of the market and the ongoing issues around consolidation, constricting both the amount of product to sell and the buyers who can acquire.

Most respondents expect to see global streamer demand grow on the buying front, with 68% of respondents (who could record multiple choices) voting for this group.

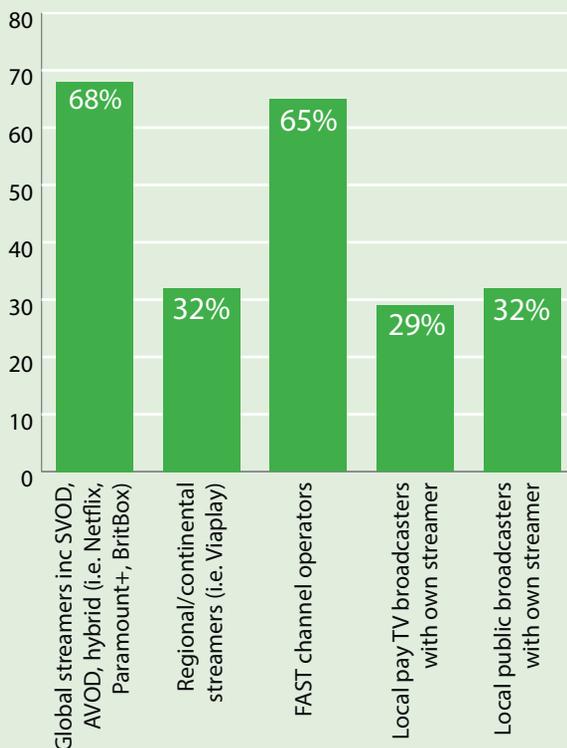
FAST, however, again made an impact, with almost two thirds expecting this group of buyers to grow in number over the next 12 months. Indeed, some kids companies have benefitted greatly from using a multiple window approach - including FAST and AVOD - and this trend seems likely to only grow among some participants.

There was a definite feeling of optimism among respondents about their future growth too, with 67% expecting their teams to expand between 20-30% in the next 12 months.

This was in line with the respondents' expectations about their future annual revenue, with another 67% expecting revenue to rise over the same time period. Half of that number predicted it to go up by as much as 30% on the last year.

On the content front, more than two-thirds of distributors said animated kids series were selling better than live-action. Yet as physical production returns to steadier patterns following the pandemic, this area looks like one to watch as we enter 2023.

What type of buyers do you expect to grow in number over the next 12 months?



Conclusion: Windows of opportunity

The industry's move towards ad-supported services appears to offer the biggest revenue growth opportunities for distributors across the board, although the impact of the pandemic continues to linger

Let's start with some positive news: revenues appear to be on the rise across the board, with almost a third of scripted distributors reporting increases by 30% or more in the past year, while just over 40% of unscripted distributors reported rises of around the same level.

Formats and kids' content distributors also reported revenue increases, while the number of companies that saw less money coming in were in the minority.

There was a reasonably united message on how firms expected this to translate into company growth, with scripted respondents on the whole (65%) expecting their workforces to remain steady for the next 12 months - an optimistic 21% believe they will expanding headcounts by 30% or more in 2023.

Unscripted distributors were less bullish, although

“Revenues appear to be on the rise across the board – almost a third of scripted distributors reported that they increased by 30% or more in the past year”

more than half of respondents expect levels to remain static over the next year.

Some of the boutique outfits that have been seeing more growth believe this is going to continue, with 13% suggesting that staffing levels will rise by 10-19% and 9% expecting their workforces to increase by up to a third over the next 12 months.

Kids distributors were by the most optimistic, with 67% of those that took part expecting their teams to expand between 20-30% in the next 12 months. This confidence is perhaps due to the rather large demand that the sector is currently enjoying from global



of scripted distributors said they are financing series earlier than ever

streaming services, with kids' content having emerged as one of the keystones of subscriber retention.

Post-pandemic progress?

The impact of the pandemic – plus shifts in the industry as many people and countries around the world have learned to live with it – were clear to see. Sticking with kids content, live-action shows may still be in less demand than animation, but the trend of growth is beginning to increase.

The incredibly nimble animation industry was able to quickly adapt to the pandemic and the necessity for remote working that it brought, with the result being something of a boom over the past couple of years. The Survey results indicate that this trend is now stabilising, however, as live-action gets back on something of a more equal footing.

Scripted, meanwhile, is largely back on form after the woes inflicted on the sector by the pandemic. While new issues, such as crew shortages and rising costs,

“Kids live-action appears to be getting back on something of an equal footing after the animation boom of the past couple of years”

have presented themselves, scripted catalogues are growing as production backlogs have cleared.

Factual shows also experienced a boost in demand throughout the worst of the pandemic, as savvy producers adapted their approach to content creation to help keep broadcasters and platforms stocked with new titles.

Unscripted grew in popularity among audiences as a result, but there are indications that this heyday might be easing too, with the sector becoming a victim of its own success as costs being to increase. A-list talent being attached to factual projects is becoming more commonplace and the cost of working in this competitive space seems to be on the rise.

22%

“Unscripted distributors expect their staffing levels to rise over the next 12 months”

AVOD growth expected

On the content front, adventure still appears to be doing the business for the format industry while the popularity of comedy is also noteworthy on the scripted side, although science fiction, horror and historical series have suffered something of a dip.

Curiously, history doesn't seem to be having that problem on the unscripted front, with 48% of Survey respondents reporting good sales in that area.

However, it was evergreen favourite true crime that took the factual crown, with more than half of respondents putting shows from this genre as being among the biggest drivers on their bestseller lists.

“FAST is being predicted to be the major area of expansion by respondents across all areas of the content distribution industry”

AVOD continues to be an area to watch, with a small but not insignificant 15% of scripted distribution respondents claiming it contributes more than 50% of their overall revenue.

It was less important, however, for those in unscripted, with 30% of respondents saying that AVOD represents between 10% and 25% of their overall revenues, while a further 42% said it accounted for just 10%.

If there was one single trend to report regarding future growth, it came via FAST, which is still being eyed as a major area of expansion by respondents in all areas - 72% of scripted distributors expecting to see opportunities grow on these channels in the next 12 months. Unscripted and kids distributors also view FAST as offering significant growth potential, particularly in the US.

Taken together, the consensus seems to be that the influence of ad-supported services, and the opportunities they can provide, are only set to grow. Indeed, with the rapid expansion of platforms like Amazon Freevee, and both Netflix and Disney+ prepping AVOD tiers, there is certainly room for further growth coming soon.

Lastly, seeing as you are likely reading this report at MIPCOM, you should be heartened to know that the majority of respondents identified it as the most important market to attend throughout the year.

TBI

40%

“of unscripted producers reported an uptick of more than 30% in sales”

Analysis: Tim Westcott, senior principal analyst for digital content & channels, Omdia

Volcanic eruptions, recession, conflict and flash floods... over the many years that I have been joining the TV business migration to Cannes, it has had to contend with some pretty challenging and unforeseen developments. In the aftermath (at least let's hope so) of a global health crisis and the impact of a European war, it should surprise no-one that distributors are coming across as resilient in TBI's survey.

More than resilient, in some cases – almost one-third of distributors report that their revenues have gone up more than 30% over the last 12 months. This is no doubt largely due to distribution bouncing back from the doldrums of COVID.

“This healthy picture for scripted is certainly due in large part to the lavish investments by streaming players and more established linear players upping their game”

Tim Westcott, Omdia



A year ago, MIPCOM (the most important event for distributors, according to the survey) was a shadow of itself, with some countries around the world still locked down and travel restrictions making travel impossible or at least risky.

Things have been looking up since then, especially for scripted – with 27% of respondents seeing an above 30% uptick in sales. This healthy picture for scripted is certainly due in large part to the lavish investments by streaming players (notwithstanding Warner Bros. Discovery's recent cutbacks) and more established linear players upping their game in response.

Distributors of unscripted have, though, done even better, with 40% reporting a 30% or more uptick in sales, with fewer seeing the existential 20-30% fall in sales reported by some scripted distributors. Profits, however, were almost unchanged for a big chunk of the unscripted sample (31%), which implies rising costs of doing business.

Another drag on profits could be the increasingly important role of distributors in financing productions, with 82% of respondents saying that they are financing scripted series earlier than before. Broadcaster (or streamer) commissions remain crucial, and more than half (56%) of unscripted distributors say they would not finance a show before they get a commission.

Distributors come across as an optimistic bunch and among the reasons to be cheerful are FAST channels (scripted distributors expect them to be the biggest crowing category of buyer over the next 12 months) and continuing custom from streamers (AVOD as well as SVOD). Among the challenges are the (seemingly contradictory) threats of fragmentation and consolidation. Still, the business has overcome worse obstacles.

Looking for a country to relocate to or
coproduce your project?



#SPAIN AVSBureau

One-stop shop to answer all your questions about co-production,
financing and incentives, B2B, creative professional talent, establishment and growth.

We help your projects come true!

spinaudiovisualbureau@icex.es 

+34 91 732 5400 



Public reflections

Public broadcasters face pressure like never before, with squeezed budgets and their very funding models under intense scrutiny. Marie-Agnès Bruneau takes a trip around Europe to find out what's happening across the continent



The Reunion is a joint project between Alliance members ZDF, Rai and France TV

Europe's public service media have faced turbulent times of late, as the traditional licence fee funding model faces challenges across the continent. France dropped it this summer and the UK is considering following suit in 2027, but these two moves are not isolated.

Over the past three or four years, broadcasters across the Nordics have faced similar challenges, with licence fees either revamped or dropped altogether. Such moves have prompted searching questions about what to put in their place and, indeed, the future of public broadcasting as a whole.

Originally collected on households equipped with a TV set, the licence fee is as old as television is. Although some European public broadcasters carry some advertising, public funding represented 79.4% of their 2020 income, according to data from the European Broadcasting Union (EBU), with 17.4% coming from commercial revenues.

And while the licence fee has come under pressure, it remains a dominant model. Even though it has been dropped by some countries – and was never the model in others, such as swathes of countries in Eastern Europe – major markets such as Germany and Italy still use it. Underlining this, the licence fee contributed 59.5% to total European media services funding in 2020, a year in which the model was used by organisations in 20 of the 56 European markets.

Looking for 'technology-neutral' mechanisms

European households paid an average €109 (\$109) annual fee in 2020 and in some ways, the system – which resembles a subscription model – still looks current. So why is it suddenly being questioned?

In France, besides the political agenda of candidate Emmanuel Macron and his promise to reduce taxes if re-elected, there were several other reasons given. These included suggestions that it was outdated, because of changing consumption habits and the decline in use of TV set equipment.

Yet, data from French regulator Arcom says that French TV households in 2021 accounted for 90.9% of all households, down from 93.4% in 2018, with the funds collected declining in tandem.

In the case of France, the country's government had to move quickly because the licence fee was collected together with another tax, which itself was axed, meaning the collection cost would then have been too high for the licence fee alone. The system was also claimed to be unfair, with all income brackets paying the same amount.

“Although each country is specific, overall, the main reasons for the past decade's reforms [across Europe] were to modernise the mechanism and find a more neutral model than the licence fee, which is based on

TV devices,” explains EBU media research supervisor, Florence Hartmann. “Germany and Finland anticipated the move, with reforms taking place as soon as 2013.”

Germany decided to maintain a flat licence fee, but extended it to all households instead of just the ones owning a TV set, she explains, while Finland replaced it with an individual public broadcasting tax based on revenues. “We now often see countries oscillating between these two solutions when addressing the issue of getting licence fee mechanisms to be more efficient.”

Fairness & social acceptance

Hartmann adds that other reasons can be social acceptance and/or fiscal evasion, but this does not necessarily imply that countries should drop the licence fee, she stresses.

“In Italy, the licence fee was not popular and they had a strong rate of tax evasion, but they did manage to modernise it. They changed the way it gets collected – it remains linked to the TV set, but is now collected via electricity bills. The tax evasion rate, which was above 30% in 2015-16, has fallen around 5-6%,” she illustrates.

“The German household model simplified the collection process and Switzerland adopted a system close to it. But for that, you need countries with housing registers and a certain amount of social consensus,” she adds. In Switzerland, a referendum over the licence fee’s future took place in 2018, with over 71% voting to retain it.

“There were some heated debates but in the end, a vast majority agreed to keep it and, in addition, that enabled the [respective] amount to reduce because more households are now contributing.”

There are other options, Hartmann adds, such as those taken up in Romania, where the licence fee was axed and replaced by direct state funding.

Similar moves occurred in some of the Nordic countries too in 2018 and 2019, when ‘technology-

neutral’ financing models were being explored. “The Nordics are quite ahead in terms of new technologies, so in some of the countries, the use of TV set equipment rate had fallen to close to 90%, where they were once over 97%,” Hartmann comments.

All of the countries shifted to tax-based financing, but with major differences between models. In 2018, Sweden introduced a special public service fee, charged, as in Finland, to individuals (1% of their annual taxable income, with a ceiling of around €130), and that was kept outside of the state budget.

Denmark and Norway, both at the time run by conservative governments, took different routes, adopting a model financed by reducing people’s basic tax deduction and including it in state budgets. Initially voted through in 2018, Denmark’s licence fee shift has been decided gradually over three years.

Independence issues

One major issue with direct state funding is the public service media’s independence from power. Although not a guarantee, the licence fee helps defend this, in the sense that it provides a rather stable and predictable automatic and dedicated funding model, and crucially it is not dependent on government good will.

The licence fee “also establishes a direct link between the broadcaster and the public, with the broadcaster more accountable to its audience,” points out the EBU.

The (editorial) independence of public service media is being taken seriously by the European Commission, which decided to address the issue in its European Media Freedom Act (EMFA), designed to protect media pluralism and independence in the European Union. The proposals were unveiled on 16 September and include some safeguards for independent and adequately funded public service media.

In the run up to EMFA, the European Audiovisual Observatory organised a conference on the topic in February. Panellists pointed to the great diversity of European countries and their public services medias,

“Each country is specific, but the main reasons for the past decade’s reforms were to find a more neutral model than the licence fee, which is based on TV devices”

Florence Hartmann,
EBU media research
supervisor



AUDIOVISUAL FROM
SPAIN

**Discover Spanish companies
brand new TV content at MIPCOM!
COME AND VISIT US!**

R7.J11 + R9 SEAVIEW PRODUCERS HUB



with editorial independence something recently established in some. They also stressed, in these times of greater polarisation, the crucial role of public service media in keeping societies coherent, in informing, fact checking and entertaining.

Public broadcasters on the panel stressed that the key to ensuring independence is a stable and predictable funding model, with a budget related to the services they have to provide.

“We were concerned because of the independence [issue] and we said there should be three prerequisites: that the new model secures independence; that it is sustainable for a long period; and that it must be perceived by the society as fair and reasonable,” said Olav Nyhus, director of legal & public affairs at Norway’s NRK.

The new model had a budget decided on a four-year term. “The challenge for us,” added Nyhus, “is when they’ll decide on the second four-year period. The system is still a little bit fragile in my opinion.”



Germinal was the result of a co-production between France TV and RAI

France Télévisions president Delphine Ernotte-Cunci also stressed the necessity to be able to forecast investment, for instance to be able to continue buying major sports events rights, which are negotiated on several year terms.

For its licence fee replacement plan, the French government adopted a provisional solution to allocate a proportion of VAT until 2023. French public broadcasters’ means and goals contracts were also extended to 2023 to give time to draft new versions in light of ongoing reform. During Festival de la Rochelle last month, Ernotte-Cunci said that the French government expressed its willingness to maintain budgets. “But what about after that?” she asked.

All this has repercussions on the content side, of course. Drama producers at La Rochelle were well aware of the potential problems.

“A scripted series requires a minimum of 18 months to be produced and more often four or five years to be completed,” said Nora Mehli, producer at Alef One

and president of the producers union SPI. “Having no visibility can put us in a dangerous situation,” she added. Indeed, France Télévisions alone represents 45% of French drama commissions.

Budget pressure

Accompanying the move away from the licence fee model has been growing pressure on public broadcasters’ budgets – and there are clear concerns that sourcing funding from a state budget does not help. The Danish 2018 reform was decided along with a 20% budget cut for pubcaster DR over five years, including channels and radio station closures.

A 2017 EBU report also stressed that in the 20 years since the Netherlands switched to state funding, the budget had dropped several times.

According to EBU figures, European public service media operating revenues were on average slightly down over the past four years – a 1.2% drop in five years for the 64 organisations in 47 markets. However, when inflation was included, the real drop rose to 6.9% – and that’s an average, as 66% saw funding cut, while 21% saw funding increases.

“There is a correlation between the level of funding and audience performance,” points out Gilles Fontaine, head of the department for market information at the European Audiovisual Observatory, which has been researching the issue.

“While public broadcasters’ total (public and commercial) revenues represent an average of €50 per person per year when calculated per inhabitant, there are great disparities between countries,” he says. Fontaine adds that they can be up to €100 in certain countries such as Denmark where subscription-based TV2 is included, or such as Switzerland with its three language feeds. Conversely, it can be as low as €10 in countries such as Romania or in Bulgaria.

“Similarly, public broadcasters account for about 26% of TV audiences, including shares of up to 80% for the public Danish broadcasters, or 48% for the German ones, but less than 10% in countries such as Bulgaria (8%) and Romania (4%).”

Keys to the safe

Despite the widespread budget stress, public service media have broadly managed to preserve content spend. Programme expenditure for 49 organisations in 39 countries was up 0.7% over five years to €17.7bn in 2020, while operating revenues were 0.9% down to €33.6bn across the same period.

This is a concern, as European public broadcasters have an important role in European content funding.



nomalab

The cloud-native content management platform

Simple, safe, predictable & cost-effective content supply

Keeping material costs low while ensuring speedy and flawless delivery once the deal is made is paramount. Traditional supply chains are no longer efficient enough, especially when dealing with large volume deals.

What if deal fulfillment could be really simple?

Meet us at Mipcom, stand P-1.J25

Book a demo at your convenience
on nomalab.com

Contact us at business@nomalab.com



“If you exclude sports, public broadcasters account for 41% of total investments in European original content,” says Fontaine. “They are roughly at par with private broadcasters (43%) and far ahead of global streamers (16%),” he says.

“Sport is a different story, as private broadcasters have a clear lead and dedicate over 40% of their original programming investments there.”



Exit emerged from the Nordvision Regional TV Alliance scheme

Public broadcasters have an even greater role when focusing on TV drama, which is second only to news in their schedule, according to the EBU. “Public broadcasters are responsible for 57% of the titles commissioned (TV films or TV seasons),” says Fontaine.

In terms of hours, they represent 36%, as private broadcasters are more geared towards long running daily soaps, he explains, adding that there are strong disparities between countries.

Soaps excluded, German public broadcasters accounted for 83% of domestic fiction hours, while the UK stood at 58%, France at 51% and Italy at 47%. In Poland, however, pubcasters account for only 26% and in Spain for 28%. Although there are no statistics, pubcasters are also known as major players in factual and documentaries, too.

As for who is getting those commissions, the EBU says public service media devote 31% of their total programme expenditure to outside commissions, 10% for co-productions and 10% to acquisitions, with 48% for in-house production.

Moreover, and importantly at a time of US streamer expansion, European content accounts for 90.5% of shows, 79% being domestic content and 11.5% being European non-domestic programming. US content makes up only 6.1%.

Coproduction & cooperation

With budgets squeezed and the very funding models themselves in flux, European pubcasters have had to adapt. Coupled with US streamer expansion and budget inflation, the focus has increasingly been on co-productions.

Underlining this has been the Alliance, which brought France Télévisions together with Germany’s ZDF and Italy’s Rai to co-fund shows. Among the output so far has been France TV’s adaptation *Germinal*, co-produced with Rai, and the Italian pubcaster’s *Leonardo*, which was co-produced with France TV.

Next up is *The Reunion*, adapted from the French bestseller from Guillaume Musso, which has all three members onboard, while France TV and ZDF’s *The Swarm* – itself adapted from the Frank Schätzing German bestseller – has also been co-produced.

As a Franco-German cultural channel with a European focus, Arte is also looking to co-produce dramas across Europe, building a network of partnership.

For their part, Nordic broadcasters have expanded their long-running exchange scheme, the Nordvision Regional TV Alliance, to include more co-productions. They launched the Nordic 12 initiative four years ago, aimed at creating 12 drama co-productions a year, while also securing digital and linear rights to them for a minimum 12 months.

Among emerging shows have been financial drama hit *Exit*, which moved into a second season. More recently, Nordic groups last year formalised the B14 initiative, another collaboration for children’s live-action that aims to produce 14 series a year, a goal already surpassed in the first 12 months.

Digital transformation

The major challenge facing almost all public broadcasters is their digital transformation as they look to reach all audiences, particularly younger demos.

At the same time, budgets are getting more thinly spread and they are finding themselves more acutely criticised, while having to justify their role in a competitive and fragmenting market.

Reflecting this situation, Nyhus of NRK – a leader in terms of digital transformation – stresses the importance of public broadcasters’ remit, requiring them to be broad and flexible for all parts of society. That is the starting point, he adds. “We had the possibility to develop our digital services, so we also reached audiences on the new platforms. If people don’t use your services, then how can they have trust in you? Trust is about independence, but it’s also about use.” **TBI**

SAVE THE DATES
January 17-19, 2023

New Place. New Attitude. **New Opportunities.**
For The Ever-Changing Business of Content.

NATPE GLOBAL

JANUARY 17-19, 2023 • BAHA MAR, NASSAU

REGISTRATION OPENS SEPTEMBER 27

Visit natpe.com for details



Dodging the bullet

Shows get cancelled all the time, but a fortunate few get a second chance when a new network or platform steps in to renew them. Mark Layton finds out what it takes to pull a series back from the brink

It is never welcome news when a show gets cancelled, but it can feel particularly unfortunate when a scripted series is canned; potentially ending on a cliffhanger that will never be resolved.

While this is the price that is sometimes paid to tell stories in the profit- and ratings-focused medium of television, cancellation is not always the end.

Commissioners might backtrack and stay their hand from the chopping block, sure, but more unusual is that, every once in a while, a third-party network or platform steps in to save the day and gives a show a second chance at life.

Finding the right fit

There is no real hard-and-fast rulebook for rescuing shows from cancellation, and decisions, it seems, are very much taken on a case-by-case basis by networks and platforms.

Lauren Anderson, head of AVOD original content and programming at Amazon Studios, tells TBI that there are “regular conversations” about stepping in to renew another network’s show, but “every show is a bit different”. Just the same as when making an original commission or show acquisition, the series has got to make sense for the service and its audience.

Amazon-owned AVOD service Freevee brought back two scripted shows this year; handing second seasons to both *American Rust*, the Jeff Daniels-led crime drama that was dropped by Showtime, and *Almost Paradise*, another crime drama, which originated on NewsNation (fka WGN America).

The latter decision, Anderson reveals, was an easy one to make: not only had Freevee become the show’s streaming home since its cancellation, but the AVOD had an existing partnership with *Almost Paradise* producer Electric Entertainment via its original commission *Leverage: Redemption*, a revival of 2008-2012 series *Leverage*.



That revival was born after the streamer saw the positive audience response to *Leverage*, which it had licensed, in much the same way as it has similarly brought back *Bosch* as *Bosch: Legacy*.

Anderson sees renewing *Almost Paradise* as an extension of the same strategy. *Leverage: Redemption* and *Almost Paradise* not only share a production company, but also a cast member in Christian Kane – who has a devoted fan following, known as Kaniacs – and Anderson says there was clear opportunity to bring existing viewers more of what they enjoy.

For *Almost Paradise*, the synergies were clear, whereas Anderson says that *American Rust* is “a totally different example,” with the decision coming down to timing, as well as, again, whether it would appeal to the audience and how it would fit amongst the service’s existing offering.

“At the same time that they were hoping they could find a home, we also saw an opportunity based on the quality of the show, the incredible cast and the creators of the show,” says Anderson. “We thought that our audience on Freevee was aligned with the audience of *American Rust* and we felt we could support the show, both with

Almost Paradise was an attractive opportunity for Freevee to ‘save’ due to the existing relationship with its producer and audience familiarity with the show

series that we had coming prior to *American Rust* on our service and those that were going to come after.”

For *American Rust* show creator Daniel Futterman, being picked up by Freevee was one of those rare opportunities to continue the series. He says he feels “incredibly fortunate” that Anderson was interested in picking up the show and for keeping the production very much as it always had been.

“We were all in agreement; let’s make the show that we were making. That meant bringing back the same cast and making the show for the same budget. Besides that, we were given free rein with story.”

The sole impact that the transition from Showtime to Freevee had, reveals Futterman, was that “due to the downtime while we were looking for a home (and then the natural time it took to get the deals done) we lost some treasured writers and crew who needed to take other jobs.

“But we’ve got all our cast back and have filled positions that were open with tremendously talented new folks.”

The ultimate pilot process

Over at NBC, meanwhile, Jeff Bader, president of program planning & strategy for NBC Entertainment, says that a show pick-up must “make sense financially,” while networks should be sure that “the show has a core fan base and that producers believe there is still creative energy left and compelling storylines to be told.”

Earlier this year, NBC picked up action-drama series *Magnum P.I.*, a remake of the 1980s series of the same name, for a fifth season after it was dropped from its original home on CBS.

Also, last year, NBC concluded cop comedy *Brooklyn Nine-Nine* with its eighth season. The show could have come to an end much sooner, as it was cancelled by original commissioner Fox after its fifth season, with NBC stepping in the very next day to give the popular programme another three years.

“Both shows were owned by our studio, Universal Television, so the risk factor was much lower than if we were buying them from an outside studio,” says Bader, who adds: “*Brooklyn Nine-Nine* was a top show on Hulu and is still showing signs of growth.”

Aside from fan loyalty, there are other clear benefits to saving a show rather than developing a new original series.

“You have a built-in audience; you have built-in awareness; you have a creative team – if you believe in the fundamentals of the original series then that means that the creative team has executed on the vision that you think aligns with what audiences want to watch. Obviously, you have performance data; in some cases you have the cast, or a portion of the cast,” says Anderson, who likens rescuing a series to “the ultimate pilot process.”

She explains: “You have a proof of concept. In old school pilot processes, you put the show together, you have a pilot, then based on that you decide that you’re going to make many more episodes – whereas if you rescue a show then you’ve got not just a first episode



American Rust (above) moved to Freevee after being cancelled by Showtime, while *Magnum P.I.* (right) found a new home on NBC after it was dropped by CBS

but many episodes to say, ‘yes, I think that this works.’

Bader adds: “With an existing series, you have a built-in fanbase and you don’t need to spend money introducing the show to viewers.”

However, despite all the pros, the NBC exec cautions that there is a possible, and rather obvious, con in rescuing a cancelled show – the fact that it was cancelled in the first place. “The show could be losing its lustre on another network and just because it’s moving doesn’t mean it will become a hit.”

Rights & timings

Delving into the nitty gritty of these deals, in the US, Bader reveals: “The previous network doesn’t benefit when the show is picked up by someone else. Only the studio benefits since they own the show. Networks don’t own the shows nor have rights to previous seasons.”

However, that is not necessarily the case in every territory. Jeremy Roberts, head of film & TV at London-based specialist media law firm Sheridans, says that in the UK: “The issues are really ones of rights and timings.”

He explains: “Firstly, who has the right to produce the subsequent season? For shows produced in the UK for the main PSB channels, the producer will usually have that right. For the rest, it will often be owned or controlled by the broadcaster or platform – although there is usually a turnaround mechanism allowing the producer to reacquire the subsequent season rights on pre-agreed terms.”

These turnaround terms will normally give the original broadcaster or platform some kind of carried interest, explains Roberts, “perhaps in the form of a passive rights fee or profit share, or both. They are also likely to have some remaining broadcast rights in the earlier seasons. A deal might have to be done on those, as the new buyer may not want the previous seasons on a competing platform.”



Then, beyond the original broadcaster or platform’s rights, the producer will need to look at issues such as underlying rights, scriptwriters and cast.

“If the cancelled series is based on a novel, there may be a turnaround provision where the right to produce further seasons reverts to the owner, although a properly negotiated acquisition agreement should give the producer an opportunity to place the series elsewhere before the turnaround kicks in,” says Roberts.

“A main writer, or showrunner, of a previous season might have an option to write some of the episodes of the new season. Usually, that’s fine – indeed desirable – but sometimes those writer options have no time limit, and, if a long period of time has passed, the writer may no longer be the right person.”

The cast, he explains, is usually optioned for subsequent seasons for 12 months, so, by the time the original broadcaster or platform has cancelled, the cast options may have expired. If they have, cast availability may be an issue, and cast deals will have to be redone.

Any network or platform looking to rescue a show from an early demise should keep these issues in mind, but when the right opportunity to take on the right show presents itself, the potential rewards appear clear. **TBI**

JOSEFIN
NELDEN

HOVIK
KEUCHKERIAN

KATHARINE
O'DONNELLY

MOE
DUNFORD

THIERRY
GODARD

ENRIQUE
ARCE

JOHN
LYNCH

OLIVIA
MORRIS

SOTA
FUKUSHI

SEASON 2

T H E H E A D

DIRECTED BY
JORGE DORADO



IN THE MIDDLE OF THE OCEAN
THERE IS NOWHERE TO RUN

THE
MEDIAPRO
STUDIO
DISTRIBUTION
STAND.R7.N1



**Banijay
Rights**

Marie Antoinette



Bali 2002



Then You Run



Serial Lover



The Forest Of The Missing



Rogue Heroes

Domina



Anonymous



Riches



Stonehouse

#Storymakersforalifetime

Script to Screen: Blue Lights



Mark Layton delves deep into the creative process with screenwriting partners Declan Lawn and Adam Patterson about *Blue Lights*, their new Belfast-based police drama headed to the BBC later this year

Decan Lawn and Adam Patterson, the writing and directing partners behind 2020 BBC drama *The Salisbury Poisonings*, are back with *Blue Lights*, a new six-part series digging deep into the realities of policing in their hometown of Belfast.

Response policing in the Northern Irish city is not like policing anywhere else, say the show creators. Patterson likens it to “trench warfare”, with *Blue Lights* less about “the complexity of a murder investigation” and more “the simplicity of being punched in the face.”

Blue Lights is set to debut on UK pubcaster BBC One and VOD service iPlayer later this year, while distributor BBC Studios has

brought the series to MIPCOM this month where it is available for international acquisition.

Act one – Good intentions vs pragmatism

The series hails from Belfast-based Gallagher Films, whose founder Louise Gallagher produced Lawn and Patterson’s 2020 short film *Rough*, and *Patrick Melrose* producer Two Cities Television, run by ex-BBC execs Stephen Wright and Michael Jackson.

Having already brought Wright on board, Gallagher approached the writing duo with the project. “Someone she knew very well had left



(L-R) Nathan Braniff & Richard Dormer work to maintain law and order on the streets of Belfast, where policing can be like “trench warfare” for officers

From that kernel, the narrative began to emerge, with *Blue Lights* following three rookie police officers: Grace (Sián Brooke), Annie (Katherine Devlin) and Tommy (Nathan Braniff), each facing immense pressure during their probation and not fully aware of the peril they have placed themselves in by taking the job.

Former social worker Grace struggles to balance the personal and professional; Annie signed up on a whim and now faces hostility from her local community; while Tommy, already earmarked for a senior role due to his academic qualifications, is disastrously inept at practical frontline response policing.

It’s not all doom and gloom, however, as Lawn reveals the show balances “a mixture of darkness and humour”. He adds: “Richard Dormer is a central role in that. He plays Constable Jerry Cliff, always there with the one liner, a natural born rebel.”

Lawn & Patterson met with 25-to-30 Northern Irish police officers, some serving, some retired, which helped to inform their characters and flesh out the world in which they worked.

Annie and Tommy, reveal the writers, are both based on real people that they met during this process.

“All of them went through that initial period of being trained in a protective kind of casing of a police college and then suddenly had to transform that onto live duty,” shares Patterson. “It’s particularly interesting in Northern Ireland, because you carry a gun as a normal cop, so with that comes greater responsibility in many ways.”

In 2019, the BBC commissioned a pilot and the first writers’ room, with the broadcaster giving the series the greenlight based on the work that came out of that process “pretty quickly.”

“With these things it almost feels like an age, but actually no it wasn’t, it was a short space of time, it was greenlit and then suddenly they needed a lot more scripts,” laughs Patterson.

Once the pandemic hit, however, the writers’ rooms moved online, with Lawn noting that they continued to work “surprisingly well” and hailing writer Fran Harris, who wrote episode three and co-wrote episode four of the series, as being “really helpful in so many ways in terms of story.”

The show creators add that they “love the writers’ room process” and believe that there “should probably be more of it in British TV.”

“Obviously it’s kind of expensive, but we find that we always come out of that process with something better than we would have had just the two of us,” says Lawn.

social work in Northern Ireland to become a cop at age 41,” explains Lawn. “The experience of that person was really interesting, joining the police in midlife and also coming at it from a social work background.”

Lawn reveals that he and Patterson had always been interested in creating a drama based in their hometown and were intrigued by the project from the beginning.

“This person became one of the central characters in the show – Grace,” reveals Patterson, who says that this allowed them to explore how “the idealism that someone has – somebody who essentially wants to do good in the world – butts right up against the pragmatism of policing.”

Act two – Riot prevention

Once the series entered production, there was, of course, the usual balancing act to play between vision and budget.

“We never compromise ourselves in the first drafts. We just splurge it all out there, everything we could ever dream of and then when the producers come back to us and say that’s probably unachievable, then we start accommodating that,” says Patterson.

“At one point we had written a riot scene,” explains Lawn: “And you know what, if we get another season, we will come back to that -

but there were certain things that you need; so many extras and such scale. You really have to cut your cloth to the budget.”

Patterson adds: “There was good reason that we had it in the original script, but with the right team - and that includes the producers interrogating the need for things - you [can see] in terms of character beats we don’t really need that in this character drama.

“Could we have afforded it if we really needed it and sacrificed other things? Of course, but in the end it wasn’t really needed.”

Directing the series is Gilles Banner, whose recent credits include ITV shows *Trigger Point* and *Marcella* and Sky Atlantic’s *Tin Star*.

“Declan and I always say that the script is a prototype; the director needs to birth it and bring it to life and you essentially hand over your vision. There is no better man that we could have handed over to,” praised Patterson.

“Gilles is just a consummate director who’s done some amazing shows, but he really understands Belfast. He’s filmed here before, he spent a lot of time here and it really takes someone that really wants to understand this place, because it’s very easy to judge Belfast, the world’s been doing it for generations.”

This understanding was essential to the writers, who describe the city itself as another character in the show.



Siân Brooke (above) and Katherine Devlin (right) portray Grace and Annie – their characters were both based upon real Northern Irish police officers

“We’ve always dreamed of making a show in Belfast and *Blue Lights* is a distillation of everything we’ve learned from living here and being journalists here. We think it shows the city in a way that’s never been shown before in terms of the bad and the good, the kind of vibrancy of it and the problems of it,” explains Lawn.

“There’s no greater test than making a show about that your hometown – because we have to live here after the show goes out – so there’s nowhere to hide,” jokes Patterson. “This place really kind of stands on an acerbic wit, it really defines the city.

“We’ve seen shows really get that wrong, like over-egging it a lot of the time - people don’t talk like that. We knew we would literally be hauled over the coals, not only by our peers, but our families, if we didn’t do that justice.”

Act three – The right side of the law

One huge vote of confidence for the series came from the police themselves, with Lawn revealing: “We showed a couple of episodes to a couple of cops recently and they said it’s the most realistic portrayal of the job that they’ve ever seen.

“That was very gratifying for us, because we put a lot of work into keeping it real down to the tiniest minutiae. To get to get that kind of acknowledgement from them was very important to us.”

Obviously, being a show about response police officers, a lot of time is spent following the characters in their cars. Patterson shares: “Everyone talked about the car as being like the office - that’s where a lot of the camaraderie and the love is born. You’re literally living in 12-hour shifts sitting beside someone, so there’s nowhere to hide if you don’t like each other.

“The car became this really interesting precinct, not an easy one to film by any means; they had to push the boundaries in terms of using pod cars and things - hats off to Gilles and to Stephen Murphy, one of the DPs, for finding a way to retain that energy and drive, whilst filming in an urban environment that has speed restrictions, even for film crews.”



Again, this facet received a thumbs up from the genuine officers. “The cops that watched the first two episodes said it felt real, the sounds and everything, so that was a big tick for all of us that we managed to pull that off.”

As the show prepares to go in front of international buyers, the creators suggest its appeal rests in the “great universality” of its themes, coupled with its “slice of life” view of Belfast.

“Everyone at some point has been in that situation - the minute you walk into your first new job - where you wonder if you are going to sink or swim. There’s a great universality to that,” says Lawn

“But it is a hyper-local show and I think that international audiences like that. That we have a show that is very much of contemporary Belfast is actually a selling point.” **TBI**



CONTENT SHOWCASE

**10-MINUTE PUBLIC PRESENTATIONS
BY VARIOUS COMPANIES**

PROJECTS IN ANY PHASE OF DEVELOPMENT

SCRIPTED OR UNSCRIPTED CATEGORY

[NEWEUAMARKET.COM/ZAGREB](https://neweumarket.com/zagreb)

A clash of Rings and Dragons



With HBO's *House Of The Dragon* and Amazon's *The Rings Of Power* battling it out for the epic fantasy throne, Mark Layton explores the stakes riding on these two big-budget shows

Once upon a time, two US content giants both launched prequel shows that were part of epic fantasy franchises, within the same two-week span.

One of the shows was handed the largest budget of any TV series ever, while the success or failure of the other would have major consequences for a network facing dramatic transformation.

With Amazon's *The Lord Of The Rings: The Rings*

Of Power and HBO's *House Of The Dragon* going head to head, will they both live happily ever after?

Money talks

The long-awaited *The Lord Of The Rings: The Rings Of Power* launched on Amazon's Prime Video last month, with this journey into J. R. R. Tolkien's Middle Earth now the most expensive TV series in the world.



With a production budget of \$465m for the first season alone, coupled with \$250m spent on securing the rights from the Tolkien estate to make the show, this freshman run comes to an eye-watering total of \$715m. That's more than \$89m per episode for season one and Amazon is just getting started. The show's five-season commitment is anticipated to cost Jeff Bezos' firm more than \$1bn by the time it is done.

Few companies could afford to spend such a large sum

on a single show, but for Amazon, primarily a tech and e-commerce giant that made close to \$470bn in revenue last year, that investment is just a drop in the ocean.

Tolkien is very much the forefather of epic fantasy around the world and there are few IPs as strong as his Middle Earth to fill the gap left behind after HBO's global hit *Game Of Thrones* came to an end in 2019.

When you can afford the best, you get the best, and with audiences crying out for more big budget epic

House Of The Dragon (left) and *Lord Of The Rings: The Rings Of Power* (right) are two of the most expensive TV series in the world



The Witcher (above) has expanded into a franchise for Netflix, while *Game Of Thrones* (bottom, right) set the benchmark for epic fantasy on the small screen

fantasy, this \$1bn investment makes perfect sense for Amazon (which has 200 million Prime members, though how many of them use the Video service is open to speculation) as it seeks stand-out content to entice customers.

The Lord Of The Rings also comes with the massive in-built goodwill and demand from both fans of the original literature and Peter Jackson's well-received early-2000s film trilogy adaptation, while reviews for the show have been predominantly positive.

At this stage, it looks like Amazon's investment could well pay off, but that could spell bad news for competing fantasy projects that don't have \$1bn to spend and are now fated to direct comparison with Prime Video's new record-breaking title.

A clash with Rings

While Prime Video is spending big to offer shows that compete with rivals such as Netflix, it is Warner Bros. Discovery (WBD) that offers the most direct competition to *The Lord Of The Rings: The Rings Of Power* in the epic fantasy genre.

To be sure, Netflix is no slouch when it comes to fantasy adaptations, currently building a franchise out of Andrzej Sapkowski's *The Witcher* series, while also acquiring rights to both CS Lewis's *The Chronicles Of Narnia* and Brian Jacques' *Redwall* novels. But it is *Game Of Thrones* prequel *House Of The Dragon* that stacks up closest in terms of audience expectation and (to some extent) budget.

Launching on WBD's HBO on 21 August, *House Of The Dragon* is the first of several planned spin-offs from George R. R. Martin's global hit, set in the world of Westeros. It too has had a promising critical reception – in-fact, streaming service HBO Max crashed for users in the US as viewers flocked in their

millions to watch the show upon release. It swiftly received a second season order less than a week after it made its debut.

House Of The Dragon's budget stands at just under \$20m per episode for its first 10-part season. For contrast, *Game Of Thrones* cost around \$6m per episode when it started out, rising to \$15m during its final season.

This admittedly still huge figure (though not Amazon huge, because nothing really comes close) may offer some consolation to other producers that such exorbitant numbers are not really required to remain competitive, if the show can continue to prove a success.

And that is key, because *House Of The Dragon* really does need to be a success for HBO. The first spin-off to *Game Of Thrones* was always going to be a big deal for the company, but it is launching at a time when WBD's new management is making huge cut backs – including across HBO Max originals teams in Europe, where much of the show is filmed.

The remaining team under Casey Bloys will, like others across WBD, be taking a quality over quantity approach to originals, making it all the more important that the titles that are made achieve greater cut through. At a cost of \$200m per season, a fantasy flop could swiftly find itself on the chopping block at the newly merged giant currently seeking to make \$3bn in cuts.

House Of The Dragon would likely have been the only show truly positioned to step into the shoes of its predecessor as the biggest – and biggest budgeted – fantasy drama series in the world, if it wasn't for that pesky \$1bn blockbuster launching on Prime Video.

Now it could be a question of just how much epic fantasy viewers want to see – and if they'd prefer their adventures in Westeros or Middle Earth. **TBI**



atf ASIA TV
FORUM &
MARKET

MARINA BAY SANDS, SINGAPORE
7 - 9 DECEMBER 2022

THIS DECEMBER SAY "HI", IN-PERSON



Market | Conference | Networking Events

SAVE OVER 30% WHEN YOU REGISTER BY 24 OCTOBER



Scan to find out more

[f](#) [t](#) [in](#) @asiatvforum | #ATF #ASIATVFORUM
www.asiatvforum.com

Produced by:



An event of:



Co-located
with:



Hosted by:



Held in:



Supported by:





Talking talent

Ron Perlman, star of *The Capture*, *Sons Of Anarchy* and much more over his five-decade career, tells Mark Layton why the best of Hollywood are moving to the small screen – and what it spells for the movie industry

The line between TV and film has grown increasingly blurred, with exploding scripted budgets and ambition leading to more A-listers making the move from the big screen to the small than ever before.

Movie star talent in Hollywood and beyond, both in front of and behind the camera, now embrace what only a handful of years ago was almost unthinkable – producing, directing and acting in series rather than theatrical releases.

It's a trend that has been accelerated by both the streaming boom, particularly with US-based global services that have deep pockets to spend on top tier talent, as well as the pandemic. Cinemas closed worldwide, talent looked for work, and movies that would once have been theatrical releases went straight or swiftly to streaming instead.

Following the talent

Ron Perlman, a veteran US actor and producer whose credits range from blockbuster turns as devilish superhero *Hellboy* to a six-season stint as outlaw biker Clay Morrow in FX's *Sons Of Anarchy*, tells TBI that this shift is nothing new, likening it to the exodus of writing talent from the stage to the silver screen at the start of the last century, and then, later, to television.

The 72-year-old has enjoyed a near half-century career straddling TV, movies and theatre and he says that right now, the small screen is looking more attractive than ever. It is where writers “dealing with the human condition” can largely be found, while the movie business has grown more about “*Star Wars* and comic books.”

Speaking to TBI at this year's Monte-Carlo TV Festival, Perlman said: “Television is taking the opportunity to say: ‘OK we can be more original than ever,’ and so the great writing started to move there. That's all I'm looking for – interesting smart original material.

“It's almost better than ever right now, because there's still the same amount of talent out there pushing ideas. There aren't quite as many venues, but the ones that are doing it are taking more risks than ever – there's some television out there that is mindblowingly cool and original and edgy, so thank God.”

Highlighting just how fast this change has come, Perlman says: “I just did a movie called *Don't Look Up* with the most important film maker on the planet, Adam McKay, for Netflix. That movie would have been in 5,000 theatres five years ago, but it was on Netflix. Guillermo del Toro, *Pinocchio* – Netflix; Alfonso Cuarón, *Roma* – Netflix; Martin Scorsese, *The Irishman* – Netflix.

“You go where the talent goes; if Martin Scorsese is working with Netflix, that's where I'm gonna fucking go.”

Opposite, BBC drama *The Capture* will return to Peacock in the US next month, while *Don't Look Up*, below, brought myriad A-list Hollywood talent to Netflix

Adapting to the times

Streaming's gain, however, is cinema's loss, with the future of the traditional moviegoing experience looking uncertain after decades of box office declines. The pandemic was "the final nail in the coffin" for some movie studios in a business already beginning to "diminish" due to the growth of TV and streaming.

Clearly, cinema isn't about to implode overnight, but, as Perlman noted, it's hard not to notice that franchise extravaganzas are now dominating movie theatres. "I mean, there's a new *Spider-Man* movie every 30 minutes; there's a new *Batman* every 20 minutes. I didn't go to school to wear spandex in a movie."

Recently, Perlman joined an impressive A-list cast including Leonardo DiCaprio, Jennifer Lawrence, Timothée Chalamet and Meryl Streep – among other big Hollywood names – for Adam McKay's apocalyptic satire *Don't Look Up*, which debuted on Netflix last year.

If ever there was a clear indication that A-listers will follow the talent, even if means foregoing the traditional prestige of the movie theatre, that was surely it.

"Every fucking movie star in the world was in that movie; it could have very easily have been on thousands of screens with big premieres all over the world, but instead we had one premiere for Netflix in New York and that was that," says Perlman.

"The way the business used to function, where you tried to get as many people as you possibly could into theatres all over the world before it went to television and streaming, that's gone."

Nevertheless, Perlman remains pragmatic. "If you're a guy like

me, who is a student of history and who has a hard time adapting to change, you could get a little bit wistful about it. You can't though - if you want to keep working you just gotta keep shucking and jiving and going with the flow."

Keeping busy

As his bustling IMDb page can attest, Perlman currently has plenty of irons in the fire. The second season of BBC mystery thriller series *The Capture*, in which he plays CIA boss Frank Napier, recently concluded in the UK, with Peacock due to stream it in the US next month.

Perlman will also be back on Netflix in December voicing the Podestà in *Guillermo del Toro's Pinocchio*. He is a regular collaborator with the Mexican filmmaker, having starred in several of del Toro's films including *Cronos*, *Pacific Rim*, *Blade II* and *Nightmare Alley*, as well as being directed by him in two outings as the titular *Hellboy*.

Perlman is full of praise for the Oscar-winning director. "I just enjoy watching how the world experiences his genius. Every time he releases something you see another slice of this amazing artist that's like no other," the actor says.

"His movies don't look like anybody else's, they don't play like everybody else's, they don't deal with subject matter like anybody else's. I've known that from the beginning. Watching him evolve and watching how the world appreciates him with every passing moment more and more and more is a big thrill."

As for what awaits beyond *Pinocchio*, Perlman sees plenty of opportunity ahead, whatever format or screen size that might be. "I'm in good form; I'm as part of the game as ever before and at 72-years-old – still the old vaudevillian, still slipping on banana peels." **TBI**



Word on the street

Quay Street Productions founder Nicola Shindler talks Mark Layton through the first titles to debut from her new firm and shares her thoughts on the state of the scripted industry



Nicola Shindler was also the founder of *It's A Sin* firm Red

Quay Street Productions, the scripted firm launched last year by former StudioCanal UK boss and Red Production Company founder Nicola Shindler, is bringing its first series to market.

Launching at a “tricky” time amid the UK’s pandemic lockdown, in January 2021, the ITV Studios-backed, Manchester-based firm has since been hard at work to deliver the first project off its slate – fact-based drama *Nolly*.

The series tells the true story of British TV star Noele ‘Nolly’ Gordon, who became a national icon for her role in long-running UK soap opera *Crossroads*.

Helena Bonham Carter steps into the shoes of the actress, who held the spotlight as one of Britain’s biggest TV stars from the 1960s-1980s – until she was unceremoniously axed at the peak of her fame, without warning or explanation.

‘Love letter to TV’

Russell T Davies, who worked with Shindler on titles including *It's A Sin*, *Queer As Folk* and *Years And Years*, has written the three-part series, which explores Nolly’s most tumultuous years and the legacy of her shocking fall from grace.

Shindler tells TBI that picking *Nolly* as Quay Street’s first project was an easy decision. “Russell mentioned to me that he wanted to do this story and when Russell mentions that he wants to do something you jump up and take notice.”

Nolly was “a woman who was at the absolute pinnacle of her career and then had everything taken away from her without any explanation as to why she was fired,” says Shindler.

“It just felt like such a fascinating story on a human level and a little bit of a mystery,” she explains, describing the series as “a love letter to television as well as a love letter to this incredible woman.”

“I like things that have very strong interesting women at the centre and that’s absolutely what [Russell has] written, so it was a no-brainer for me. Then when ITV came aboard, it very quickly took a momentum of its own. Once Russell wrote it, we were in production – as sometimes happens with Russell’s shows, when the time is right then you’re going for it.”

Shindler explains that *Nolly* is an “absolutely universal story” that she is sure will appeal to audiences outside the UK, who might be unfamiliar with the star.

“It’s the story of someone who has everything and has it taken away from them and how they deal with that. It doesn’t matter if you don’t know *Crossroads*; it’s about a woman who is extraordinary and how she deals with extraordinary situations.”

Not just 'bubblegum television'

Next in line at Quay Street is *Significant Other*, a UK adaptation of Yes Studios' Israeli series of the same name.

The six-part comedy-drama started filming last month, with Shindler revealing that she "fell in love" with the original after it was brought to her attention by writers Dana Fainaru and Hamish Wright.

The series follows the story of a depressed divorcee who decides to commit suicide, but, while waiting to die, is unexpectedly interrupted by a neighbour having a heart attack – sparking a most unusual relationship.

"It's the most exceptional romcom, because it's people who are at such a low ebb of their lives and it's never too sweet, it's never inevitable. You do not know what's going to happen between these two people, because almost every interaction they have is dreadful, but you just know there is something, a spark between them that keeps you watching."

What unites these two projects, and the kind of shows Shindler is looking to make at Quay Street, is that she considers them both to be "hugely entertaining – which is massively important for what we do, and sometimes that gets forgotten – but also they are saying something, so they are not just bubblegum television."

Shindler explains: "There are things there that are important to say – with *Nolly* it's the treatment of women at that time, but also through the ages, and with *Significant Other* it's looking at loneliness and exploring how as a modern society we [live] side by side, but without ever really knowing people."

The cost of living

Nolly and *Significant Other* will both debut on the upcoming SVOD/AVOD hybrid streamer ITVX in 2023, with Shindler describing the new service as "an exciting place for us to put our dramas" – though investors appeared less positive about ITV's new digital-first windowing strategy when it was first announced in March.

Shindler believes if ITVX can establish audience loyalty with its original commissions then it can attract "both a heartland ITV audience, but also people who might not watch ITV on a regular basis," with the shows that head to the company's linear channels in the following months serving as a second hit.

Meanwhile, Quay Street has ridden out the pandemic wave, with UK TV production revenues now bouncing back to pre-Covid levels, but Shindler cautions another spectre is looming, with the country's current cost of living crisis hitting the scripted industry.

"I think in terms of budget we're being impacted

in other ways, not because of the covid backlog, but because of the cost-of-living increases. Every single thing costs more to do and make and buy, for us as well as everyone living in the UK.

"That means that our budgets are stretched a lot more and that makes it harder to make shows because the money isn't necessarily rising at the same rate as the budget."

And then, there is the ongoing issue of crew shortages. "The amount of drama that is being made makes it quite difficult at the moment, just in terms of getting good crews together and good HoDs. We've been very lucky on both *Nolly* and on *Significant Other*; we've got fantastic people in every role. But I know that out there it's scary."

There is, of course, still a big upside to this UK drama boom, notes Shindler. "People are looking for very original material and they're looking for lots of it and there isn't a desire to just put on what's already been successful in the past. From every single channel, there's 'what's next? How can we entice audiences?' and that's just brilliant for producers." **TBI**

Nolly is the first series to launch from Quay Street and stars Helena Bonham Carter as the titular British soap star



Spanish surge

Scripted talent in Spain is more sought after than ever, as global streamers and local operators tap into surging demand for drama. Richard Middleton talks to six creative talents to find out what they're watching and gets their take on their country's current drama boom



Álvaro Carmona

What has been your favourite Spanish drama of the past few years and what does it say about the country's scripted industry?

It's probably *Antidisturbios* (pictured, above), aka *Riot Police*, for Movistar+. It is a series made with great precision and care, which in other hands could have become a product similar to other things already seen - yet it knows how to preserve its own essence.



Global streamers get much of the credit for the booming international demand for Spanish drama, but are there other factors at play too?

I do believe there is a lot of Spanish talent that has been latent for years and that now, thanks to the platforms, it is beginning to become visible. I don't think there should be a competition between the two - the talent needs the platform and vice versa.

What do you make of Spain's current broadcaster/streaming ecosystem? Are commissioners still too risk averse? Are budgets constraining ideas?

I still err on the side of being romantic, but I think it's the opposite: limitation enhances creativity, not the other way around. It is true that since there is so much fiction, the budgets have to be spread out more, but I don't think that this necessarily has to be negative. And no matter how complicated it is today to cast a series in Spain, it is infinitely easier than five or 10 years ago.

Tell us about your current project and why it might be of interest to viewers outside of Spain.

Right now I'm shooting a project called *Déjate Ver* for Atresplayer Premium, produced by Buendía Estudios. I don't see much point in thinking about how the project will be received by the audience, because these things are always out of your control.

We are simply trying to make the best series possible, putting all the love in the world into it.

Nerea Castro

What has been your favourite Spanish drama of the past 12 months and what does it say about the country's scripted industry right now?

For me, *Cardo* (bottom, right), for Atresmedia Television, has been very refreshing and inspiring. The creators have made a commitment to get out of prevailing narratives and it is very encouraging to see such a good reception for a free and unusual product.

What do you make of Spain's current broadcaster/streaming ecosystem? Are commissioners still too risk averse? Are budgets constraining ideas?

There is a certain resistance to exploring some narratives. Sometimes there is a fear of getting out of the formula that has already worked, especially when dealing with large budgets. I see more freedom when the project is smaller, because there is less at stake. The natural evolution will be to take more risks on larger projects.

Tell us about your current project and why it might be of interest to viewers outside of Spain.

Mentiras Pasajeras [for Paramount+] tries to reflect characters far away from the stereotypes. We have made an effort to build complex characters who cannot be read immediately and we have focused on reflecting new family models. [Production firm] El Deseo has contributed its experience to guarantee a result that will rival international shows.

Blanca 'Blanchi' Andres

What has been your favourite Spanish drama of the past 12 months and what does it say about the country's scripted industry right now?

El Tiempo Que Te Doy (Netflix) - it has a creative commitment that is different, at a formal level. The brevity of its chapters makes it a perfect example of the famous 'less is more', a risky maxim perhaps but one that it fulfills in an outstanding way.

Global streamers get much of the credit for the booming international demand for Spanish dramas, but are there other factors at play too?

Of course! We have an outstanding level of technical understanding (despite how self-critical we are); we have outstanding actors (despite how self-critical we are); and we have an outstanding model that meets deadlines and budgets with great results (and here we are not self-critical because the outstanding result is very obvious).

What are the two biggest trends apparent in Spanish dramas right now?

Terror and teenagers!



In your opinion, what is the most underrated Spanish fiction series and why?

Ser O No Ser (aka *To Be Or Not To Be*) on RTVE Play. It is one of those small series (in terms of production) that has a very powerful message that, possibly because it was so niche, did not receive all the praise it deserved.

What advice would you give to anyone looking to work with Spanish creatives?

Never censor their chaotic creativity (especially in the initial brainstorming phase); reach a consensus with the very particular Spanish timetables (I have been Spanish all my life and those timetables kill me!); and trust us, because we are used to making the impossible possible.

Miguel del Arco

What has been your favourite Spanish drama of the past 12 months and what does it say about the country's scripted industry right now?

I really liked *Hierro* (Movistar+), *Riot Police* (Movistar+) and *Veneno* (Atresplayer). I think they're good examples of how with a good script and good production levels, we can make the local universal, like others do.





What are the two biggest trends apparent in Spanish dramas right now?

I've heard many times that [commissioners] don't want period series or films with a social theme. What the public wants is always a mystery and what the producers want is always a success. But nobody has, fortunately, yet created the algorithm to solve that.

Tell us about the most recent project you have been/are working on, and why you think it will grab the interest of the audience outside of Spain

Las Noches De Tefía [for Atresplayer] is a three-stage story about a 19-year-old boy who was interned in a Francoist concentration camp for being homosexual. He relived his story in 2004, when in Spain the Equal Marriage Law was being discussed in Congress. During the terrible nights he spent in the field, a colleague told stories to forget the harsh reality. In one of these stories, *El Tindaya* arises, a delirious cabaret in which everything is possible - even changing history.

Estibaliz Burgaleta

What has been your favourite Spanish fiction series this past year and what does that title mean for the Spanish fiction industry at the moment?

Tú No Eres Especial (Netflix), not only because I debuted as a creator, but also because it is a series that opens a path for youth programming in Spain. It mixes entertainment with comedy and a supernatural touch. We have also made an effort so that the characters in the series are believable teenagers, with whom the viewers can identify.



Global streamers get much of the credit for the booming international demand for Spanish dramas, but are there other factors at play too?

There are other factors, such as language, that play in our favour. A series in Spanish on a global platform aspires to the entire Spanish-speaking market and has it easier than a series in a more minority language. Also, the success of Spanish series is a consequence of what has previously been sown. Shows such as *Velvet*, *Los Serrano*, *Un Paso Adelante* - series with international success and sold to many countries before the launch of streamers.

What do you make of Spain's current broadcaster/streaming ecosystem? Are commissioners still too risk averse? Are budgets constraining ideas?

The audiovisual industry has always been very conservative, it is easier for them to bet on something that has already worked (hence remakes and adaptations) or to bet on something that is as cheap as possible. It is logical - producing a series requires a large investment. Any screenwriter is more than used to making revisions that consist of cutting costs: removing characters or grouping locations. Sometimes the platforms and production companies expect the script to solve everything - managing to be fun, agile, with lots of things happening on screen, but also to be very economical.

What are the two biggest trends apparent in Spanish dramas right now?

Youth series of all kinds, with touches of intrigue, fantasy or comedy, but aimed at young audiences. Melodrama, whether realistic and current or set in another era and with a more glamorous touch, is also a trend that is deeply rooted in Spanish fiction.

Coral Cruz

What has been your favourite Spanish drama of the past 12 months and what does it say about the country's scripted industry right now?

Cardo - it is a project that fits with a typical production trend of the moment: series created and performed by an actress. There are notable international precedents like *Fleabag* or *I May Destroy You*, but in Spain it is really an upward curve with series like *Perfect Life* and *Selftape*.



Global streamers get much of the credit for the booming international demand for Spanish drama, but are there other factors at play too?

Global platforms in Spain have greatly invigorated the production of TV drama in our country, but they are not the only reason. Knowing that you are addressing a global audience boosts creativity, but also the much higher budgets allow writers to imagine any type of story without so many obstacles. Another factor has been the long-awaited end to the obsolete format of 70-minute episodes. And finally, over recent years, we have managed to establish the figure of the showrunner - an ingredient, in my opinion, that is essential to give coherence and maximum quality to a television production with the spirit of international projection.

Tell us about the most recent project you have been/are working on, and why you think it will grab the interest of the audience outside of Spain

The last series I worked on is *Ser O No Ser* (pictured, above), a dramatic youth comedy for RTVE Play. It is the first series starring a trans teenager and played by a trans actor. It is my first series as creator, writer and executive producer. As a result of the feedback we have received through the networks, the series has already had a lot of interest in other countries, especially in Latin America. **TBI**

AFM[®]22

SANTA MONICA | NOV. 1-6

AMERICANFILMMARKET.COM | BRINGING FILM TO LIFE



Scripted Hot Picks

Our selection of the most exciting, dramatic and thrilling scripted shows heading to market

Summer Of Sorrow

Hailing from Finland, this 10-part drama was first written more than a decade ago and is set in the suburbs of Helsinki during the 1980s. It explores what happens after a child disappears from a close-knit community, as bereft local parents decide to take matters into their own hands. The story tracks how neighbourhood secrets, from the past and the present, re-surface and intertwine with a coming-of-age tale in which teenage friendship, love and loyalty are tested.

“The idea comes from a film script that the writer/director [Jani Volanen] originally wrote back in 2007 but that never got made,” Fleur Wheatley, VP of sales at Keshet International, tells TBI. “It was told from the perspective of a young boy as he investigated a crime in his neighbourhood. Fast forward 10 years to when Jani was working at Rabbit Films and the idea was resurrected - this time as a TV drama, with just one episode making up what the film might have been.” The original concept remains - a story told through the eyes of the children who are not party to the truth - but *Summer Of Sorrow* isn't a celebration of the 1980s, Wheatley adds. “The series was shot in and around a beautiful post-war

suburb of Helsinki called Munkkivuori. It's so green and peaceful there, that when Jani used to cycle around it, he'd always think 'there's got to be something wrong happening here'. That's why he chose it as the setting for this mystery drama.”

Telling the story from the kids' points of view provides a unique perspective but also created challenges, not least how to ensure it was an authentic representation of what they might be thinking and how they might be acting. The resultant show came about because of the writing and directing, says Wheatley. “As you watch the series unfold, you'll notice that the scenes with the parents only happen when children are present, so they can see or hear what's happening. But there is a lot of misinformation and many misunderstandings as they try to work out what's going on.”

At its heart, the show is a coming-of-age drama with children at its centre, but the parents' reactions “bleed over into all of their lives,” Wheatley says.

“Once this missing child part of the story is resolved, it becomes old news for the children and they just move on, returning to their lives. We'll have to see what is next for them in season two.”

Producer: Rabbit Films

Distributor: Keshet International

Broadcaster: Elisa (Finland)

Logline: A tale of one fateful summer, seen through the eyes of the children at the heart of a terrifying mystery



**Top
Pick**





Last King Of The Cross

This Tim Roth-starring series is from Mark Fennessy's recently launched indie Helium Pictures and is set in the "decadent, crime-infested, but very sexy district of Kings Cross in 1980s/90s Sydney," as the prodco's founder puts it to TBI.

Greenlit by streamer Paramount+, it follows John Ibrahim's rise from a poverty-stricken immigrant with no education, no money and no prospects, to Australia's most infamous nightclub mogul in Kings Cross: a mini-Atlantic City, barely half a mile long with every form of criminality on offer. The show is based on Ibrahim's best-selling autobiography of the same name and Fennessy tells TBI that he assisted in

recreating the authenticity of the era, "along with the many colourful characters who populated The Strip." To do that, the area was built from the ground up in a car park in western Sydney. "We populated the set with literally hundreds of extras bringing The Strip to life in an authentic way - from street walkers and the homeless, to the Bikies and the Silvertails on a night out." The international appeal, Fennessy says, lies in the show's ambition.

"*Last King Of The Cross* is epic in scope and operatic in tone with a brilliant mix of characters and a thrilling and multi-layered plotline which delivers a big, bold event series that audiences will find gripping," he says.

The show also provides a contrast to other recent shows to emerge from Australia, which have employed "the usual backdrops of Bondi Beach and the harsh Outback." It is this, Fennessy adds, which makes it "an attractive, different proposition for audiences, many of whom will have visited Kings Cross at the time or since then, giving them a personal attachment to the series."

Producer: Helium Pictures

Distributor: Cineflix Rights

Broadcaster: Paramount+ (Australia)

Logline: An operatic story of two immigrant brothers – one worshipped by his father and the other scorned – who organise the street but lose each other across their ascent to power

The Crash

A shocking tale based on true events, this series begins when a Boeing 747 flying to Tel Aviv crashes into two jam-packed residential high-rises in the suburbs of Amsterdam. The show, set in 1992, explores how the Dutch government's claims that the plane was only carrying perfume, flowers and computer parts almost escaped scrutiny, until people started to fall ill and presented facts that didn't add up.

The show was created and written by Michael Leendertse (*Turbulent Skies*), directed by Lourens Blok (*Boy 7*), and co-directed by Edson Da Conceicao (*De Sterfshow*). Fleur Winters (*Heirs of the Night*) produces and tells TBI the drama was researched for more than a decade before it came to screen.

"The crash and mystery surrounding it always stuck with [Michael] during film school and when he read an article between journalists Vincent Dekker and Pierre Heijboer, how they worked together to ensure the people living in the area needed to be heard, he knew he had his story. He contacted Vincent Dekker and

they became very close. Both Vincent and Pierre are two of the three main characters in the show."

Journalists, rescue workers, ambulance personnel, victims and politicians were interviewed for the series, which used VFX to recreate the accident itself.

"The crash is essential to show because first, it is what sets the larger investigation in motion and what drives the series. But second, and most important, the fact that you as a viewer feel and see the impact of such a horrible disaster, makes you immediately understand the victims. The power of storytelling means you can choose which point of view of your character you want to show to understand their starting point, their challenges and join them on their journey."

Producer: Big Blue

Distributor: StudioCanal

Broadcaster: NPO 1 / KRO-NCRV (Netherlands)

Logline: A political thriller based on the true events of one of the most controversial disasters and biggest cover-ups in Dutch history





The Best Of Us

Producer: Quad Drama, TS Productions

Distributor: APC Studios

Broadcaster: France Télévisions

Logline: When a local athlete is found dead, his village is in shock. But as the investigation into his murder expands, his status of a hometown hero gradually crumbles

This crime thriller hails from France and has been written by Lucie Prost, Aurélia Morali (*For Sarah*) and Isabel Sebastian (*The Intern*), with Floriane Crepin directing. It tracks the death of a local star athlete – Abel Guérin – who is found in a snowy field with a bullet in his head. However, once the initial

shock over the apparent murder subsides, the story rapidly gathers pace after a young police captain – Awa – ups sticks from the city in an attempt to solve the case, peeling back the truth about Abel and his entourage.

“Appearances, or the need to get rid of them, lie at the heart of the show,” explains Emmanuelle

Guilbart, joint-CEO & founder at distributor APC Studios.

“Awa’s mission involves piercing through these preconceptions from the outside, in a small village where everyone knows each other.”

Family bonds are central to the show’s dynamics, Guilbart tells TBI, while Awa is haunted by her own brother’s death, so she can relate to the loss of a loved one. “The victim’s family, including the overbearing mother to the three siblings, suffer from torn ties and unfulfilled expectations, which can only remain swept under the carpet for so long.”

The show’s atmosphere is enhanced by its setting in the wintry French Alps, while international audiences will quickly pick up the “well-paced ‘whodunit’ series”, which also offers “an assortment of characters, who all seem to each be hiding their own secrets.”

Marie Antoinette

Producer: CAPA Drama, Banijay Studios France, Les Gens

Distributor: Banijay Rights

Broadcaster: Canal+ (France)

Logline: The story of the incredibly modern and avant-garde young queen, who goes on to defeat the enemies of the Versailles court with courage and dignity

Deborah Davis (*The Favourite*) is behind this eight-part drama that looks to tell the lesser-known story of the French queen, who was barely 14 years old when she left Austria to marry the Dauphin of France.

Played by Emilia Schüle (*Ku’damm 56/ 63*), the show tracks how the stubborn young princess attempts to navigate the rules of the French court, establishing herself despite rumour and gossip circulating behind her back.

Louise Ironside (*The Split*),

Avril E. Russell (*All on a Summer’s Day*) and Chloë Moss (*Run Sister Run*) are also attached as writers, with Pete Travis (*Bloodlands*) and Geoffrey Enthoven (*Children of Love*) directing.

Simon Cox, EVP of content & acquisitions at Banijay Rights, tells TBI that the show is “arguably the most comprehensive story of the life of Marie Antoinette to date,” using Davis’ experience on *The Favourite* to create a rounded, textured portrayal.

The show has been shot on locations including the Châteaux of Versailles, Vaux-le-Vicomte, Lésigny, Champs, Voisins, and at the emblematic studios of Bry-sur-Marne, adding to “the authentic, rich and sumptuous feel of the series,” Cox adds.

As for international appeal, the reasons are varied, he adds.

“Tales of kings, queens and heirs to thrones have always intrigued and entertained audiences worldwide.

“But this series twists this slightly, telling the story through the prism of Marie Antoinette herself – a female perspective not usually taken in storytelling in this genre.”



The Swarm

Producer: Schwarm TV Productions, Intaglio Film, NDF IP, Bravado, Viola Films

Distributor: Beta Film, ZDF Studios

Broadcaster(s)/streamer(s): ZDF, France Télévisions, Rai, (Italy), ORF (Austria), SRF (Switzerland), Nordic Entertainment Group, Hulu Japan

Logline: Engaged by an oil company to conduct a biological survey, a professor of marine biology discovers a destabilising ice worm threatening the continental shelf

A truly international show from the get-go, this one has broadcasters and streamers from across Europe and Asia already attached, along with Frank Doelger (*Game Of Thrones*). Fittingly, the story straddles the globe, exploring what happens when the world's oceans start exhibiting strange happenings.

Setting out to solve the issue is a marine biologist, who discovers a destabilising ice worm threatening the continental shelf and then

puts forward his belief that an intelligent life force, dwelling in the Arctic Ocean, has borne witness to man's destruction of the seas and has decided to drive humanity to extinction.

The show is based on Frank Schätzing's 2004 novel, also called *The Swarm*, which went on to sell 4.5 million copies in Germany alone and was translated into 27 languages. The series, meanwhile, has been shot around the world, from Svalbard to Newfoundland,

from France to South Africa. The sets were built in different regions of Italy with the support of production designer Julian Wagner (*Tribes Of Europa*) and VFX supervisor Jan Stoltz (*Fear The Walking Dead*).

Alongside Doelger on the production side is Marc Huffam (*The Martian*) and Ute Leonhardt (*Killing Eve*),

while the cast includes Cécile de France (*The New Pope*), Alexander Karim (*The Lawyer*) and Leonie Benesch (*Babylon Berlin*). At its core, the series is a punchy - and timely - environmental thriller that explores what could happen if we continue to disrupt and dismantle the ecosystems that make up the world around us.



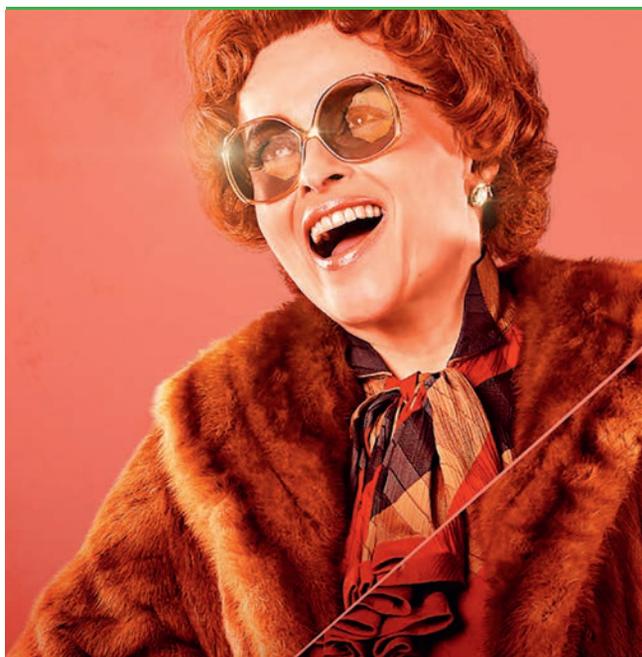
Nolly

Producer: Quay Street Productions

Distributor: ITV Studios

Broadcaster: ITV & ITVX (UK)

Logline: Helena Bonham Carter steps into the shoes of the inimitable Noele 'Nolly' Gordon in this affectionate and heartbreaking portrait of a forgotten icon



Helena Bonham Carter leads the cast in this affectionate and heartbreaking portrait of a forgotten British icon, which has been written by *It's A Sin* scribe Russell T Davies.

The series tracks the life of Noele 'Nolly' Gordon, who became a huge star in the UK for playing Meg Richardson in ratings smash, *Crossroads*, between 1964 to 1981 until - at the peak of her fame - she was suddenly axed without warning or explanation.

"Nolly was the most famous TV star of her time, yet she is mostly forgotten and her story is extraordinary," reveals Nicola Shindler, exec producer and CEO of Quay Street Productions, which is behind the fact-based drama.

"She was a powerhouse. The first woman ever on colour TV, a TV producer in the 1960s when that was extremely rare for a woman, invented British

daytime TV, the first woman to interview a British Prime Minister. The list goes on," Shindler tells TBI.

"The story of how she was sacked and then forgotten feels incredibly important at a time when we are re-evaluating the treatment of women in work by powerful men."

Shindler adds that Nolly's real-life story was "so extraordinary with such dramatic twists and turns" that there wasn't "the need to invent more than a single beat of the story. It was inherently dramatic and entertaining. Of course, Russell has shaped her real-life experiences to fit our three-part series but barely invented anything."

Augustus Prew (*The Rings Of Power*), Mark Gatiss (*Sherlock*) and Richard Lintern (*Young Wallander*) also join the cast, portraying real-life stars of the era.

Attention grabbers

From Barack Obama to Lupita Nyong'o and America's First Lady, A-list talent is becoming a 'must-have' addition for unscripted projects. Tim Dams explores the growing trend and its implications



If you want proof that the market for A-list presenting talent is red hot, consider the outstanding narrator category in this year's Emmy Awards.

Former US president Barack Obama added to his list of achievements last month by winning the category for Netflix documentary series *Our Great National Parks*.

He saw off a raft of rival talents to scoop the award, including natural history supremo Sir David Attenborough, Hollywood star Lupita Nyong'o, basketball legend Kareem Abdul-Jabbar and US stand-up comedian W. Kamau Bell.

Our Great National Parks won an Emmy for its narrator – former US president Obama

Demand for such top presenting talent is higher than ever as broadcasters and streamers look for shows that can stand out at a time when viewers enjoy a surfeit of content choices. And nothing helps boost the profile of a documentary like the addition of a celebrity host or narrator.

'Huge name' appeal

The market for on-screen talent is "massive" right now, says Doug Mackay-Hope, SVP of development and production at Wildstar Films. "The sky is the limit in terms of getting huge names attached to documentaries."

Wildstar's Nat Geo/Disney+ series *America The Beautiful* is narrated by *Black Panther* actor and producer Michael B. Jordan, while *America's National Parks*, also for Nat Geo/Disney+, is narrated by country star Garth Brooks and features First Lady Dr Jill Biden in each episode as a guest narrator. "It's a great opportunity for them to show a different side of themselves and for us and the platform to attract an additional audience that might not naturally come to wildlife documentaries - it's a win-win all round," says Mackay-Hope.

For producers, it's vital to package a show so that it is "undeniable" when it is being pitched to commissioning executives, says Joe Weinstock, CEO of Rose Rock Entertainment, a joint venture with Argonon that was launched in May. "And part of that package always revolves around talent." Weinstock's career credits include hit A&E format *Duck Dynasty* as well as Disney+'s *Becoming* and *River Of No Return* for Discovery.

But attaching talent to shows comes with a host of challenges for producers.

Not surprisingly, they can add quite a significant cost to productions, increasing the pressure on financing, says Julie Meldal-Johnsen, EVP of global content at ITV Studios. "Where finance from various international partners and or distributors is needed, it can be a complicating factor as so many international buyers need to replace narrators with someone speaking in the local language and language barriers can negate the value talent can bring in the home country."

Cost efficiencies

There are ways to work around high talent fees, says Weinstock. Clever scheduling can reduce the number of days they might be needed on a shoot, cutting their required fees; or they might be brought on as an executive producer and take a share of the production fee itself.

Weinstock says talent is like a 'double edged sword' for projects. Yes, projects with talent attached are more likely to be greenlit – but getting the talent attached in the first place can be a challenging and complex process. Producers can only offer projects to "sophisticated talent" one at a time, rather than offering to multiple talents. "And when you go out to A-list talent, there are lots of people around these folks that take time to respond."

And then, after all the effort of attaching a talent, what happens if buyers are not that interested in them fronting a doc? So, it's important to have off the record chats first with commissioners to see what they think of particular talents.

Adding to the complexity, top talent won't really want to be part of a project unless it is greenlit. But you need to have had some kind of conversation with the talent first to get them attached in principle. Wildstar's Mackay-Hope says: "If you say it's with Tom Cruise, the first question any self-respecting commissioner is going to ask is: 'Is he on board?' No one wants to be that person that just says: 'No, Tom has no idea we are pitching this, but I am sure he'll love it...' Those meetings tend to come to an end soon after!"

Tying in talent

Producers stress that it is crucial to attach the right talent to projects, and not just to go searching for a big name for the sake of it. "The idea has to be brilliant first and foremost and then the talent has to really add to it – be it from their own passions or personal experiences," says Mackay-Hope.

"The talent needs to be intimately involved in the show or have a passion for the subject matter," adds Weinstock. "You can't get away with vanity credits any longer. Viewers are smarter about this these days."

A good example of a talent being intimately involved with a subject is recent ITV commission *Vicky McClure: My Grandad's War*, which sees the *Trigger Point* and *Line Of Duty* star talk to her 97-year-old grandfather Ralph, a Royal Navy veteran who helped to invade France during the Normandy Landings. The one-off special is produced by North One and Build Your Own Films.

"It's a great opportunity for huge names to show a different side of themselves, while for us, and the platform, it attracts an additional audience"

Doug Mackay-Hope,
Wildstar Films



Having a topic that is of personal importance to the talent, such as *Vicky McClure: My Grandad's War*, is key



Channel 4's *Alan Carr's Adventures With Agatha Christie* uses the comedian's wit to engage viewers



“Language barriers can negate the value talent can bring in their home country”

Julie Meldal-Johnsen,
ITV Studios



“Having a subject that genuinely appeals to a passion the talent has – offering them a unique chance for a wonderful experience to shine a light on an issue they feel strongly about – is ideal,” says ITV Studios’ Meldal-Johnsen.

She says that hosts who can bring humour and wit are in demand. “Alan Carr with his charisma and liveliness is fantastic – he is the perfect companion to audiences in [Channel 4’s] *Alan Carr’s Adventures With Agatha Christie*.”

Meldal-Johnsen adds that narrators who have particular voices that audiences can recognise are also sought after. Stephen Fry is the onscreen host and narrator of ITV natural history series *A Year On Planet Earth* from Plimsoll Productions. “His warmth, compelling presence and instantly recognisable voice are a huge asset to the series.” Meldal-Johnsen also cites the “mellifluous voice” of Sophie Okonedo as being particularly in demand for natural history - she is narrating *Running With The Beast* from Atlantic Productions and Plimsoll Productions series *Mother Nature*.

Some shows demand a very particular kind of talent. Amsterdam-based distributor Lineup Industries handles the format *Taboo*, which sees a famous comedian take on subjects that society has judged too taboo to laugh about, be it blindness, obesity or other

physical disabilities. They source their material directly from those affected after spending five days living with them. The format has sold to broadcasters in territories like Australia, Belgium, Israel and Portugal.

The number one challenge of producing the series is finding the right comedian to host the show, says Lineup co-founder Julian Curtis. It requires the comedian to immerse themselves in other people’s lives, and to write a routine based on a highly challenging subject matter. “It’s a show, which I think would have sold more if the talent was much more easily or readily available.” If the presenter gets it right though, the reward for them can be great in terms of public profile and perception.

Looking ahead, there are questions about the future of talent-led documentaries. Is it a bubble that will peak? Will the cost-of-living crisis lead viewers to search for more relatable documentaries that reflect their own lives, rather than those presented by high profile names? Weinstock recalls that transactional series such as *Pawn Stars*, *Storage Wars* and *Cash In The Attic* resonated in the aftermath of the 2008 financial crisis.

Whatever their future, it’s impossible to deny the current pulling power of the talent-led documentary. And there are very few that are predicting its demise anytime soon. **TBI**

EXCITING BOLD FORMATS



PASSION
DISTRIBUTION
FORMATS

VISIT US AT
MIPCOM STAND P4.C18

WATCH.
CJENM.
COM

#100,000,000

#100,000,000 ↑

↓ 100,000

THE **GAINER**
THE **LOSER**
THE **KEEPER**

**TRUST
NO ONE**



- 41.4 KG
- 45.2 KG
- 51.4 KG
- 51.8 KG
- 81.3 KG
- 86.5 KG
- 89.3 KG
- 94.5 KG
- 101.4 KG
- 201.0 KG



#26,000

↓↓↓
#26,300,000

ZERO SUM GAME

VISIT CJ ENM AT BOOTH **R8 B18**



Seeking the truth

True crime's soaring popularity means cutting through is harder than ever. Tim Dams explores if lines are being crossed

Few genres have proliferated like true crime over recent years, with the carousels of streaming platforms sprawling with titles like *Night Stalker: The Hunt For A Serial Killer*, *My Daughter's Killer* and *The Tinder Swindler*.

But as demand for true crime continues to grow and as producers look to cut through the mushrooming genre, are lines being crossed?

A background sense of disquiet has always accompanied such shows. In some corners of the industry, there is talk of a perfect storm of high demand for the genre, tightening budgets and a lack of experienced programme makers to tackle docs that have complex duty-of-care needs.

BBC's *High: Confessions Of An Ibiza Drug Mule* hails from Blast Films, whose Graeme McAulay cautions against harassing victims families

Cut & rush

Graeme McAulay, creative director at Blast Films, has worked on a range of acclaimed crime series throughout his career, including *24 Hours In Police Custody* and *Life On Death Row*. Recently, Blast has produced Channel 4 series *Murder in the Alps* and the BBC's *High: Confessions Of An Ibiza Drug Mule*.

McAulay says there are a finite number of major crime stories from the past 20 years worthy of a TV series but there is a "rush" to tell them.

"What everyone has to remember is that the families and loved ones involved in these stories are getting called and contacted relentlessly. If you are a family



connected to a case with a really high public profile, then you are probably going to be fielding a lot of calls. And that can't be very nice."

McAulay has spent many years covering crime, initially as a broadcast journalist. "The first thing you need to have is a journalistic approach to it, rather than an entertainment or TV approach. That's where your ethics and principles need to begin from."

He stresses that Blast is only interested in stories if there is something new to say or a genuine reason to tell the story again, and if the key people involved want to tell their story.

For *Murder In The Alps* - about the unsolved killing ten years ago of a British family in the French Alps - Blast had access to the brother of one of the victims who himself had been a prime suspect in the case.

McAulay says the doc is about an unsolved murder



Murder In The Alps tackles the human impact of the theories surrounding a family's murder a decade ago

and a brother who wants to tell his side of the story. "That's an example of a documentary that is really worth making - the question we were asking is not, 'who killed this family?' but, 'why has this not been solved yet?'"

He also believes there is another layer to the documentary that makes it about more than true crime - and that is about the human impact of the conspiracy theories surrounding the killings. "We wanted to give viewers the experience of following these conspiracy theories and being seduced by them, so we can understand the seductive nature of them and reflect on the human cost of them."

Protocol & production

Other producers echo this point, saying that it is often important for a true crime doc to be about more than the specifics of a crime itself.

BriteSpark Films, part of Argonon, for example, has two recent true crime series on its slate: Channel 4's recently aired documentary *Porn King: The Rise And Fall Of Ron Jeremy*, about the adult film actor accused of more than 30 counts of sexual assault involving 21 women and girls across more than two decades; and an upcoming Investigation Discovery series provisionally titled *Wild West*, about homicide investigations in small communities in the contemporary west of America.

Nick Godwin, creative director and co-founder of BriteSpark Films, says the two-part *Porn King* series "asks the central question: 'Is it conceivable for a male porn star to rape a female porn star?'" Of course we know the answer to that, but before the MeToo movement, the victims would not have gone to the

police because it is unlikely they would have done anything. No one really cared.”

The documentary, he explains, “is about a bigger cultural moment in terms of story than the arrest and charging of one man.”

In the UK, true crime production must adhere to guidelines from regulator Ofcom, which says that programme-makers and broadcasters should always carefully consider the likely impact on those involved, such as victims or their close relatives.

Ofcom, for example, says those whose experience is to feature in a true crime show, or their close family, should normally be informed of the plans to make a programme.

That said, there are no industry agreed rules for making true crime documentaries. Sometimes producers will approach victims before they have a commission to see if they would like to participate or to tell their side of the story. In such cases, a producer should inform potential contributors that the documentary has not been commissioned yet.

Other times, producers will approach people after they have secured a commission or development funding from a broadcaster.

Securing participation often comes down to the skill of individual APs or researchers - some are better than others at striking up a rapport. Often approaches are made through intermediaries, perhaps a friend of the family, a journalist who knows them well or via police contact. “If victims are reluctant to talk, we won’t push it. That just wouldn’t be right,” says Godwin. “But you’d be surprised at how often people do want to talk.”

Similarly, producers may or may not choose to screen a completed documentary to participants beforehand. Some will not do so unless there is specific agreement in place beforehand; others will allow it to ensure the contributor is happy.

Experience counts

In most cases, broadcasters and streamers like to work with experienced producers on true crime shows.

That’s because making true crime TV is arguably more challenging than any other factual genre. “If you are considering as a company getting into true crime, good luck - it is a compliance and litigation nightmare,” says one producer.

For example, in the UK and the US, a victim of sexual violence is entitled to anonymity, so it is important to be sure that you have their written approval to waive this if they choose to take part.

Says Godwin: “We won’t do a very low budget crime series – given the level of research and legal



The Tinder Swindler became a global hit for Netflix

“If you are a family connected to a case with a really high public profile, then you are probably going to be fielding a lot of calls – that can’t be very nice”

Graeme McAulay,
Blast Films



responsibility, it is just not worth it.”

The bar has been raised in true crime documentary production too. Just as drama has become more sophisticated in recent years, moving from relatively straightforward procedurals like *CSI* to the multi-layered, nuanced narratives of *Breaking Bad*, so too has high-end true crime TV.

The complexity of making true crime docs hasn’t dimmed broadcaster and streamer appetite for the genre. Godwin says there is nothing new about this – but that demand has spiked because there are now more outlets looking for true crime, from streamers through to podcasters. “People have always told crime stories since time immemorial,” he says.

McAulay adds that the genre is popular because it’s about “stories at the extremities of human experience.”

However, many factual commissioners are deluged with ideas for true crime docs – and they will often ask producers to bring documentary ideas that are not in the true crime space.

That said, most are looking for “stranger than fiction stories” (and true crime fits this bill very well) or a fresh take on a very well-known crime.

Amid this demand, McAulay stresses how important it is for programme makers to be mindful of the human impact of what they are doing and to engage viewers with the different people involved in the story on a deep and human level.

“If that’s what your rationale is and that’s your approach is from the beginning, and you are doing it in a way which is open and where you’re bringing the people whose stories you’re telling along with you from the outset, then that’s the right way to do it. That’s when you feel like you’re doing the right thing.” **TBI**

QATAR

PEARLS IN THE SAND

52 min.

4K



35^{YEARS} ORF
UNIVERSUM
NATURE

8 × 48 min.

HD



DAYS

THAT NEVER WERE

Whole new worlds



Virtual worlds have been talked about for decades but to many, it's still unclear what the metaverse is. Richard Middleton explores and finds a universe of content opportunities

Call it what you will, but the potential provided by virtual worlds are endless for those involved in creating content. The metaverse seems to open up myriad potential to tell stories in new ways, yet it also generates pushback and furrowed eyebrows - not least because just what the metaverse is or will be seems unclear.

Perhaps that's why Vicki Dobbs Beck, VP of immersive content at Disney-owned Lucasfilm & ILMxLAB, doesn't use the term too much.

"It's next-generation storytelling, connected across

platforms," she says, speaking at RTS London. For Dobbs Beck, the approach to creating content for virtual worlds is more focused on "a holistic creative vision", with the goal being that if you can offer various experiences via the world then "the whole starts to become greater than its parts".

Brand experimentation

There has already been considerable experimentation with pushing brands traditionally associated with TV into these virtual worlds. Online

Seed, a virtual game world created by Klang Games

video game *Fortnite* recently hosted a new world around BBC Studios-owned *Doctor Who*, with the world allowing players to take on new adventures, missions and battles while exploring iconic locations from the ‘Whoniverse’. But the game also provided the setting for the *Doctor Who* Museum, an interactive world where players can find out more about the show.

For Jatin Aythora, director of research & development at the BBC, the word ‘metaverse’ describes the way in which “we are going to be operating on internet platforms with multiple interactions.”

“We’ve been following this trend for some time - back in 2004 we were experimenting with digital twins [virtual recreations of physical systems] and looking at how a digital world might look.”

Fast-forward almost two decades and the imagined potential is now becoming possible, he says. “It gives us the opportunity to explore how we can engage with viewers and expand our public service offering. And we also want to make sure we remain relevant within that public service offering, that will matter a lot.”

Mundi Vondi, CEO & co-founder at Berlin-based Klang Games, agrees that the term ‘metaverse’ can “be very divisive”. It is instead, he says, about the technology that “enables us to connect thousands if not millions of people across the universe... it’s basically a gaming space and evolution of that.”

And within these worlds, there appear to be huge opportunities for both content creators and rights holders.

Warner Bros. partnered with *Fortnite* in 2020 to offer ‘movie nights’, enabling players to watch Christopher Nolan films such as *Inception*, and the BBC’s Aythora says there is great potential to put other content into these virtual environments.

They also, however, provide canvasses for storytelling like never before, and across genres.

“You have to be willing to experiment, it’s like being at the start of the TV or film industries,” says Dobbs Beck. “It’s a new version of storytelling.”

She says there are three themes that link what Lucasfilm is doing in the space: storytelling; immersive technologies and “mixed reality so you can step inside our stories in new and different ways”; and the potential of creating communities.

“It’s also about finding that balance – one of the things we think about is balancing the curated story with participating in that world in a way that preserves the integrity of the world but also provides meaningful ways to engage.”

Educational engagement

For unscripted producers, the potential is immense. As BBC Studios has shown with its *Doctor Who* Museum, there is the potential to create virtual destinations that can provide entirely new experiences for fans.

And there are also expectations that these virtual worlds will start to focus on user generated content (UGC). “The evolution of the metaverse is very much centred around the toolset you provide the user with, so they can create experiences for each other - that’s where you see immersive experiences,” continues Vondi.

His company is behind Seed, a virtual world that aims to provide “engaging media experiences” to users, while also creating online communities.

For many, interacting in such virtual worlds can seem removed, but for younger generations, digital goods have as much value as their physical counterparts.

“It’s abstract for me, but not for them,” says Dobbs Beck. “And they want to have a role in the worlds and engage directly with the content – that’s really important to consider looking 5, 10, 15 years from now.”

For Vondi, there will be no lightning moment when the world flips to engaging in virtual environments, just as there was no overnight shift to other technological shifts such as streaming. “It’s a continuous evolution, it won’t come as a shock to anyone. A lot of the talk is, ‘it’s coming, don’t miss it’, but I think it will seep in over time. More and more of your purchases will become virtual and before you know it, you’ll be spending more on virtual goods than physical goods.”

For the BBC, such virtual worlds are another technology through which they will likely need to participate in to remain relevant. And as Aythora points out, the tech’s maturity provides an additional place for the pubcaster to “inject public value and introduce educational and news content”.

“I don’t think we’re late, we’re observing. It depends on if you want to be an interactive content provider or not.”

“The Walt Disney Company sees this as a very significant opportunity,” adds Dobbs Beck. “And we are trying to understand what it means for the company. For us, we are trying to transcend physical, digital and virtual worlds... Our version of the metaverse may be different to others. And that is something that people are really trying to explore now.” **TBI**

“These worlds give us the opportunity to explore how we can engage with viewers and expand our public service offering”

Jatin Aythora,
BBC



Factual Hot Picks



Our selection of the hottest and most fascinating factual programming heading to market in Cannes

Con Girl

Producer: CJZ

Distributor: Bossanova

Broadcaster: Network Seven (Australia) & Paramount+ (UK & Ireland)

Logline: Docuseries digging into the crimes of Australian con artist Samantha Azzopardi, featuring exclusive interviews with her victims

This 4 x 60-minute documentary series tells the stranger-than-fiction story of con artist Samantha Azzopardi, who has amassed at least 70 false identities since she embarked upon her career of deception as a 14-year-old girl from Brisbane.

On the surface, Azzopardi seemed innocence personified, but behind the sweet facade was a brazen and sophisticated confidence trickster - and a psychological enigma.

Producers CJZ dig deeper than ever before into Azzopardi's crimes and the impact on those she has left in her wake.

"*Con Girl* is the result of a complex two-year investigation by the CJZ team that has uncovered a series of world exclusives on a case which continues to attract global media interest," reveals Andrew Farrell, head of factual at show producers CJZ.

"We were able to find and interview a number of key survivors of Samantha Azzopardi's cons. Some have never been publicly named before, none have ever told their stories in this much detail. What they reveal is often shocking, giving us extraordinary insights into the astonishing activities

that Samantha convinced them to undertake."

Farrell explains that the series also seeks to analyse why Azzopardi committed her crimes. "In a world first, we gather all the witness accounts and evidence from a string of her cons into one place and give it to leading forensic psychologist, Professor Richard Frierson, for analysis.

"Across the series he leads us on a fascinating journey through Samantha's psychology as we seek to understand what drove her on one of the most unusual crime sprees in history."

While Azzopardi started out in Australia, her story is global and one that will undoubtedly appeal to international audiences, says Farrell. "Her cons took her across the world. This series covers events in Ireland, Canada and Australia.

"We interview survivors from France, Australia and California. We speak to experts in London, New York City and South Carolina.

"The success of multiple recent unscripted and scripted series about cons has shown there is a universal fascination for these kinds of stories that transcends borders."



Mother Nature

Producer: Plimsoll Productions

Distributor: ITV Studios

Broadcaster: The Roku Channel

Logline: An immersive and intimate portrait of the lives of animal mothers big and small, around the world

From a cheetah with six hungry newborn cubs, to a tiny poison dart frog who has to piggyback her babies to safety, this 2 x 60-minute natural history series is focused on the lives of animal mothers of all shapes and sizes.

“*Mother Nature* explores motherhood through some of our best loved animals as well as some more unusual ones,” says series producer Seb Illis. “The challenges these incredible animal mothers face are familiar to us all – putting food on the table, standing up to a bully, protecting vulnerable babies, self-sacrifice – even if the circumstances are somewhat different.”

The show is “more than just

a celebration of the matriarch,” say Illis, who describes it as a “visual feast.”

“Filmed in some of the most beautiful locations in the world, using the latest camera technology, it is a chance to marvel at the natural world through the eyes of our best loved animals. In short, it’s perfect viewing for the whole family.”

Highlighting some of the animal families featured on the show, Illis shares that among his personal standouts are the cheetah and the Thomson’s gazelle.

“It’s very unusual for a cheetah mother to have six cubs reach six weeks, the age



they were when we started to film them. At that age they are incredibly vulnerable to any number of predators, but also their demands for food are huge.

“It meant the cheetah mother needed to hunt regularly as well as keep track of her young family.”

Meanwhile, Thomson’s

gazelle babies have a desperately low chance of survival, he reveals. “They are an easy meal to any number of the predators in the Masai Mara, but the mothers are extremely protective. We filmed an extraordinary sequence of a gazelle mother fending off a hungry jackal.”

My Name Is Reeva: I Was Murdered By Oscar Pistorius

Producer: WB Productions, in partnership with Cactus Tree Entertainment & Bloodrose Productions

Distributor: Keshet International

Broadcaster: Mnet (South Africa)

Logline: Docuseries with exclusive access to Reeva Steenkamp’s parents as they confront Oscar Pistorius as part of his parole process

It’s been almost a decade since Paralympian Oscar Pistorius was convicted of the murder of Reeva Steenkamp. Now, her parents must come to terms with their devastating loss once again as they confront Pistorius through South Africa’s Victim Offender Dialogue process, a condition of his early parole.

This 3 x 45-minute series offers exclusive access to their journey, while experts, state attorneys, investigating officers, and Reeva’s friends and family speak publicly for the first time

about these events and share new evidence and theories that were never presented in court.

“Because this docuseries is fully endorsed by Reeva’s parents, it is very much an unflinching reclamation and celebration of their daughter, as the bright, beautiful, and gentle soul she was before she became known to the world as a murder victim,” says Fleur Wheatley, VP of sales at Keshet International.

“Her optimism and love touched so many people during her short life and Barry and

June’s loss is clearly still so raw for them. For true crime fans, unprecedented access to the key people linked to these tragic events – investigators, lawyers, experts, journalists, friends and family of Reeva – offers a fresh perspective on a murder case that made headlines around the globe, presenting new evidence

and theories about what actually happened that fateful Valentine’s Day night nearly 10 years ago.”

The doc, however, is far more than a re-examination of the case, it is an emotional journey exploring the impact of Reeva’s loss on her parents and how they must once more face the man that killed their daughter.



Kaepernick & America

Producer: Triple Threat TV

Distributor: Espresso Media International

Broadcaster: N/A

Logline: One-off documentary exploring the aftermath and cultural impact of Colin Kaepernick's decision to take the knee in protest of police brutality and racial inequality in the US

Available in an 88-minute or 52-minute format, this one-off documentary explores the aftermath of US quarterback Colin Kaepernick's 2016 decision to take the knee during the national anthem at the start of NFL games, in protest at police brutality and racial inequality.

His act caused an earthquake in the race debate in the US and beyond, and this film examines both the man and his protest, and the remarkable conflict stirred by his symbolic gesture.

"Kaepernick's protest was an American exercise of free speech portrayed vehemently by his opponents as un-American

or unpatriotic," explains Gary Cohen, executive producer at Triple Threat TV. "The murder of George Floyd re-calibrated the larger public's perception of Kaepernick into a visionary whose bravery and heart compelled him to stand up to a system that has grown unwilling to confront its detractors."

Cohen says that the film explores how Kaepernick's protest helped to shape that larger narrative. "*Kaepernick & America* provides a review of a remarkable moment in American life – the rise of Trumpism and the growing divide amongst its people.

"As the country polarised,

Kaepernick's simple image, a Black man on a knee, became a lightning rod for both sides. Trump used Kaepernick as a symbol of the ungrateful, unpatriotic left, while supporters rallied around his bravery in calling attention to societal issues. It's only now that we can see this issue as the canary in the coal mine of the divide that defines America today."

It's a symbol that reverberated around the world and is "an

issue that remains high on news agendas", adding to its international appeal, says Georgia Walters, marketing & acquisitions executive at Espresso Media International.

"His 'taking the knee' has resonated in sports stadiums around the world, especially within international football where players have taken the knee prior to the start of a game as a symbolic gesture against racism," she adds.



Send Nudes: Body SOS

Producer: Crackit Productions (UK)

Distributor: Passion Distribution

Broadcaster: E4 (UK)

Logline: Relatable series about people with body hangups who get the chance to see what they would look like after cosmetic surgery

This transformational series (also available as a format) offers people with 'body hang-ups' the chance to look into the possible future, via 3D animated avatars, to show them an ideal of what they could look like if they went ahead with cosmetic surgery.

A presenter in the studio and a diverse panel will receive the individual's 'nudes' and add their feedback as the contributor looks to make a big decision.

"We all have issues with our bodies and *Send Nudes: Body SOS* does two important things," says Crackit founder

Elaine Hackett. "Firstly, it gives our contributors an idea of what their bodies would be like if they had surgery to change their shape. Secondly, and more importantly, it gives honest reactions to their body as it is now and post any changes."

"*Send Nudes* takes the TV makeover into the future by combining eye-popping 3D modelling technology with a warm, body positive tone. It's the ultimate cosmetic surgery try before you buy," adds Nick Tanner, Passion's director of sales & co-productions.





Opinion Siobhan Crawford

Sugary treats

TBI's resident format expert casts her eye over the offerings being launched at MIPCOM this year

MIPCOM sounds like it will be a rave. But a rave with very few edibles: don't panic... but we are content-light people!

From that 'paid for advertising' news that is circling, to all the press releases, we are seeing limited new launches. Does that mean people are saving the launches for when they're in Cannes? Securing content is a down-to-the-wire activity and our dear distributors are hard at it!

Rather than say 'hot picks', let's see if we can do a bit of a format topline round-up from what we know at the end of September.

- **Be-Entertainment** – *Finder\$ Keeper\$*. OK, if you are a broadcaster, pick up your phones and call Gepke. If you are a producer sit on your hands and wait. This one is good.

- **Rabbit** – *Wedding Diaries*. The new daily stripped diary format coming from Finland - consider the possibilities with a great cast and big moments following the wedding to extend the series.

- **Phileas** – *Instant Millionaire*. A scripted/unscripted hybrid that delves behind the curtain of a gameshow (that is really being played). Curiosity has me wanting to take a peak.

- **Lineup** – Two launches this market. *In Other News Today*. quizzing celebrities on the news has never been so fun, with viewers winning prizes from the comfort of their sofas.

- **Storylab** – Launching three new formats this market. *The Alcohol Experiment* has the best potential due to the demand for social experiment with soft formatting.

- **Media Ranch** – *The Story Of* continues to be big, plus *The Things My Dad Failed To Teach Me* will also be making waves this market. Call Tanja as big news is floating.

- **D360** – You have to love Canadians - they just get formatted content. *A Cut Above* is the only chainsaw competition you need in your life. High stakes.

- **Newen** – Two titles, plus existing pushes. Close in on *The Bodyguard* as it is unique insight into an industry that we don't see often; a really refreshing approach.

- **BNNVARA** – *Take Me Home* on NPO3 is a 'finding our roots' series, asking people to make the journey to ancestral homes and then asking the big questions but with solid ratings.

- **And the rest:** Acun Medya - we know a dating format is coming our way; Magnify is finalising titles, but will be pushing *Master Cleaners* and *Love Raft* from MIPTV.

And the groups?

All3Media's IDTV may have played the best game announcing the successor to *The Traitors* with no details at all - and *The Unknown* is just that. It will also drive people wild by remaining that way till market. Banijay is asking us to take a hike... *The Summit* is formatted with known game mechanics.

Nippon TV is asking us to drink a *Time Potion* – my experience of drinking is that it makes you forget time, but OK.

Red Arrow Studios is launching *Love For The Ages*, which asks troubled couples to separate and date younger people. Armoza is doing what can only be compared to *Sex Tape*, but for parenting, in *Parents Unfiltered*; Fremantle is challenging their casting department with *Unbreakable*; and Passion is asking us to *Send Nudes*. Optional I guess.

There is more, there is always more, but these are the headlines now. Though I urge you - consider the originality of the content. Also, look around and ask if a format is an investment or a quick burn? I was looking at the K7 MIPCOM 2021 trends recently and there must have been 50 titles. One year later, only nine formats are still active internationally. The idea that content is so disposable really makes me wonder - are we just launching content so we have something to say every six months? There is snobbery about bringing 'old' content back to market, but actually would it not be better to have something stable rather than quick burns? Distributors need to do this more than ever to avoid catalogue bloat.

MIPTV and MIPCOM are essential markets, not for content but for the relationships that give you advantageous access to content. So, foster those relationships hard at Brown Sugar! **TBI**

Siobhan Crawford is co-founder at Glow Media and has worked in the format business for almost two decades at firms including DRG, Zodiak, Banijay and Primitives

The premier event for changemakers in
creating, distributing, and monetising content



MEDIA & ENTERTAINMENT LEADERS SUMMIT 2022



Wednesday 16 November 2022
Church House Westminister, London

Brought to you by

Digital TV Europe

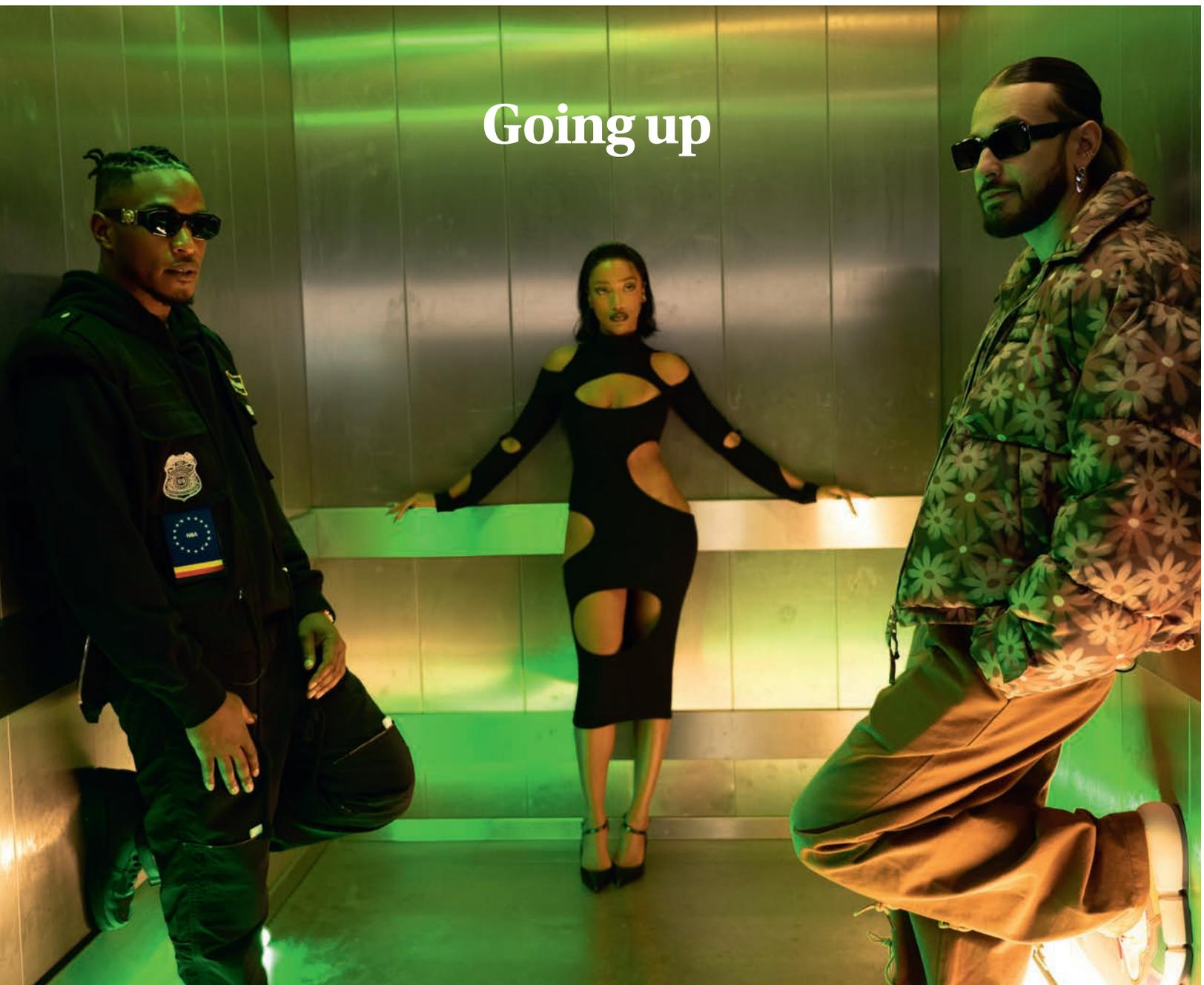
TBI Television
Business
International

OMDIA

Brought to you by
informa
tech

For more information please visit:
www.mediaentertainmentleaderssummit.com
#MELS22





Going up

Amazon Prime Video and Netflix have both enjoyed huge recent success with unscripted formats in France. Marie-Agnès Bruneau reports on what's next and where opportunities lie

Nouvelle École has performed well for Netflix, partly due to France's deep hip-hop roots

France's format market is in flux as growing demand from local broadcasters and streamers fuels a new wave of unscripted programming across the country.

Both Amazon and Netflix have enjoyed recent success with format adaptations this spring, when the second season of comedy gameshow *LOL*

became one of Prime Video's most-watched series across all genres and origins.

Not to be outdone, Netflix had hip-hop talent competition *Nouvelle École*, or *Rhythm + Flow France*, which remained in its Top Ten in France for five weeks in a row. Both, of course, were then also renewed.

Cultural resonance

Part of the reason for *Nouvelle École*'s success lies in hip-hop's deep roots in France and as Lucy Leveugle, Netflix's director for creative strategy in EMEA, tells TBI, the show offered "an authentic story" that was "really relevant to [French] culture."

French production company Black Dynamite, known more for its documentaries than its format adaptations, was chosen because of its connection to the hip-hop community and Leveugle says the result was "a reinvention" of the original US show that debuted in 2019.

It was, she adds, a series that developed its own personality, with new sets and backgrounds compared to the US version. "It's an interpretation rather than an adaptation, so you get a local feel," Leveugle explains, adding that it was introduced over three weeks rather than made available for bingeing all at once. "We do that sometimes – it's a conversational show and we felt it was really important to build on that conversation."

Leveugle says *Nouvelle École* is "part of a bigger regional strategy for non-fiction", with more originals and adaptations in the works. "Subscribers, perhaps, are more used to documentaries, and we'll do some more as well as more format and docusoaps, which can be really impactful."

For Thomas Dubois, who heads Prime Video original production in France, the "great thing" about *LOL* was that its audience grew in the second season. "It became one of our greatest successes in terms of engagement," he says.

Born as *Documental* in Japan, the Prime Video format was first adapted in Mexico, "then with our Italian, German and Spanish colleagues, we thought why not try adapt it ourselves," Dubois tells TBI.

"Humour is something very domestic – we don't all laugh in the same way at the same type of things," he continues. The French version has a different length and includes its own format arcs, while much attention was put into the diversified casting of celebrities.

And although it is fast to shoot, with just one location, and based on one simple rule – to get the other person to laugh – Dubois says "it actually required quite a lot of work upfront, with the talents developing their sketches with the help of writers."

Format hunting

Prime Video also renewed *Celebrity Hunted*, which had already been adapted in Italy, and which will develop more of a humorous tone in season two. "Another innovative format we are launching is *Cosmic Love* – astrology became a very popular topic

during the lockdown," he says.

Adapted from the US dating format, the French version will have more episodes and a host, reality star Nabilla, who already had her own docu-soap on Prime Video. The range underlines Amazon's broad demands. "What matters is the idea and concept. We'd love to find the next *LOL*: a simple pitch, well-known faces, in a surprising situation," he says.

For producers, such as Jean-Louis Blot, president of Banijay's Endemol France and the company that produced *LOL* and *Celebrity Hunted* for Prime Video, the two shows are "a strong signal" of how quickly streamers have acquired the know-how in adapting international formats.

There may also be new opportunities from broadcasters via their own streamers, which are starting to dedicate some budget to production. Leading is France.TV, which just had a hit with a local adaptation of *Drag Race*, a third-party format to which Endemol France had picked up the rights.

France Télévisions has already been producing streamer-first dramas to attract younger audiences and Blot says investment has also come in unscripted, notably with *Drag Race*. "They understood the potential and invested so we could produce a quality show, which became a marker on a society matter," he continues. The show was broadcast on France 2 in a late-night slot following its online success and will gain a better strand for the second season.

Replicating global trends, the major terrestrial

"Is primetime getting more fragmented or perhaps primetime shows are getting more targeted? Mainstream is still capable of driving big numbers"

Jean-Louis Blot,
EndemolShine France



Drag Race has enjoyed online popularity for France Télévisions



broadcasters have also been reviving well-known brands as the market becomes ever-more competitive with fragmenting primetime viewing. “Is it that it’s fragmented or perhaps primetime shows are getting more targeted?” asks Blot. “Mainstream is still capable of driving big numbers.”

However, the recent re-launch of *MasterChef* met disappointing linear audience figures on France 2. Blot says that as the show was targeting younger viewers, the older audience moved away. Reflecting this, the show saw ratings rise considerably on catch-up.

One of Endemol France’s upcoming launches is the reboot of TF1’s former hit reality talent show *Star Academy*. “This format is perfectly suited to modern usages in its narrative and form, with its live feed, its daily show and its primetime and second part of the evening shows,” says Blot, underlining that reality works well on-demand. “It’s perfect for MyTF1 Max.”

Another reason why format franchises are being revived is because unscripted fare is gaining new linear primetime strands at the terrestrials. TF1, for instance, is scheduling shows on Tuesdays, with *Koh Lanta* and *Masked Singer*, while M6 is introducing additional unscripted strands to replace audience-dropping US series, which have no strand on the channel this fall.

“We’re coming off the back of more than a decade of US series supremacy,” says Blot. “Now they are disappearing from primetime and being replaced by unscripted, which is cost effective. There is much



Les Traîtres was a summer success for Studio 89

demand, although broadcasters remain somewhat risk-averse and because nothing happened in unscripted for 10 years, there’s a shortage of talent.”

Talking of risk-taking, M6 subsidiary Studio 89 enjoyed summer success with *Les Traîtres* (*The Traitors*), adapted from Dutch format *De Verraders*. It led at launch and “also reached a 38% share among women under 50, a record for a new show since the channel was launched,” says Florence Duhayot, MD of Studio 89.

“It’s a very disruptive psychological game and it required great courage to do it. Its look, its narrative were completely different,” she says. Here too, much attention was put on casting, including celebrities of various ages. She is now looking for formats “that can bring audiences together, explore new grounds and create an event.”

Studio 89 also found success this summer with original creation, *Qui Peut Nous Battre?* (*Who Can Beat Us?*), marking its “best launch for an original show in two years,” Duhayot says. The show was developed by Studio 89 after it teamed with RTL Group’s development structure, LC Group (Matthias Scholten) and produced together with indie French TV.

Studio 89’s *Top Chef* and *Mariés Au Premier Regard* (*Married At First Sight*) continue to perform, and Duhayot says that despite the influx of streamers, the strategy remains the same.

“Yes, there are more outlets but our job is still the same – to get millions watching us. When you see that *De Verraders* is going to be adapted by HBO Max in Spain, that *The Mole*, that we adapted in the past, was acquired by Netflix and that *Dancing With The Stars* is moving from ABC to Disney+, it shows we all look for extremely impactful shows that break new ground. And then from there, we need to produce it well.” **TBI**

Netflix’s EMEA wishlist

“We are looking for shows in three categories: formats/unscripted; docu-soaps/reality; and docuseries,” says Lucy Leveugle (left), who joined Netflix from Channel 4 in the UK four years ago to develop non-fiction in the EMEA region, together with local teams. She was recently elevated to director of creative strategy for EMEA.

In docu-soaps, the cast must “really stand out” and in docuseries the focus is on stories people know. She gives as examples South African docuseries *Senzo: Murder Of A Soccer Star* and Norway’s *Mister Good, Cop Or Crook?* “Everyone, there, knows these stories.”

As for unscripted and reality, beside *Nouvelle École* in France, recent hits have included *Young, Famous And African*, which has reached the streamer’s Top 10 in South Africa, Kenya and Nigeria over four consecutive weeks. Also renewed were Spanish docu-soap *I Am Georgina* and reality series *Love Never Lies*, “an interesting local format that we are considering adapting in other countries,” she says.

Although Netflix is interested in developing formats, there is no systematic strategy because to be adapted, a format has to be relevant in the country, she points out. The streamer also, of course, likes to retain IPs but has developed a model that sees creators getting a fee each time the IP is remade. It is “an already proven business model,” she says, used for instance with *Too Hot To Handle*. And risk remains of interest, although Leveugle adds that *Too Hot To Handle* is already “quite edgy”. She adds: “Bold does not have to mean shocking – it can be exciting, new, moving a genre forward.”



DICM DUBAI INTERNATIONAL CONTENT MARKET

Jumeirah Beach Hotel

23 - 24 NOVEMBER 2022

The most efficient market for film and TV professionals to meet and close deals

dicm.ae



CONTENT AT PLAY

Organized By





Paper format creators you need to know

Format expert Siobhan Crawford takes a look at some of the best minds in the business and identifies an array of creators who you really need to add to your contacts book

Let's talk about paper. Unscripted formats are in essence long-term games with no short-term rewards and a low success rate - but we do it, as one creative told me, because we are fascinated with new things and possibilities.

The world is global and that odd, obvious statement is poignant: content travelling and people pitching paper from country to country in their networks, purely for the love of their content and new things. The pandemic has ravaged many independent creators' stability and ability to sell, especially those that do not have the financial safety net of a group and which are undeterred by the conscious bias of the broadcasters that want group content 'safety' instead of the unknown.

With that in mind, can we pay it forward and help creatives get their content out into the world in a more immediate way, where for once they are not the hunters but the hunted?

16 Ukers Helvete hails from Nordic producers Nexiko

In an industry where content grabbing is relentless, why not grab the new?

The following are independents, whose current drive is developing paper formats for export to the international market. Almost all are unaffiliated. Does that mean you can swoop in with a \$20,000 advance and some 30+5 BS? No, it does not.

Oldies but goodies

The concern in writing this is that you'll have heard some of these names before. But hey, if you don't speak to them then here's a reminder that you should.

- **Dreamspark** – the one and only Moe Bennani is now an independent. The ex-Talpa creative has made his first hire and the slate is growing.
- **Phileas** – Sergio Sancho, understated but incredibly hard working, generating three to four new paper

formats each market. Most successful in Spanish speaking markets to date, many of you will be scheduling pre-MIPs with this man.

- **Free Kings** – Full disclosure, I'm now working with the ex-Blazhoffski Belgium duo Muriel and Geert, who have been focused on the food space with the success of *Bake Off*. But they also have an expanding portfolio of paper formats that are well worth a look.

Single & ready to mingle

Here are the names of a few solo/duo creators of unscripted content you should get to know. Have a good rifle through for the gems:

- **Chris Lowden** – Chris has multiple active projects with international partners, he is using his personal connections to find homes. So far most of his deals are outside of Europe.
- **Angell Brothers** – Tom and Miles are dedicated creatives who also work in the branded content space. Their last two formats were with Magnify Media. Their name will pop up as more of us internationals befriend them.
- **Kirsten Jan van Nieuwenhuijzen** – Kirsten Jan is one half of the team behind Keshet dating format *Singletown* and he has now co-developed *The Connection* for BNNVARA with solid ratings.
- **Anssi Rimpelä** – the first commissioned format from Anssi will be broadcast this fall on YLE, *The World According To Comedians*. Ask him to talk about his favourite format and be as intrigued as I was.

Names in lights

Trying to keep these names truly global:

- **Bernhard Hendling** – the Austrian ex-commissioner is a hard working man, consulting for broadcasters, co-developing a format with Media Ranch and with a UK development to be announced soon.
- **Carl Schultz** – South Africa is not a market that comes to mind for paper, but genuinely lovely producers should be appreciated globally! Ex-Endemol Shine, Carl is on a mission to get South Africa on the map and he also assists other creatives to finesse their formats for the European market.
- **Orhan Gazi Karamanoglu** – ‘We create originality’

“Can we help creatives get content out into the world in a more immediate way – where they are not the hunters but the hunted?”

Siobhan Crawford



The Connection was co-developed by Kirsten Jan van Nieuwenhuijzen

is just the best tagline in our industry. Turkey has always been open to paper formats, daring even, and thankfully Orhan founded Qcontent entirely focused on unscripted, so the catalogue is growing.

Find a gem

- **Nexiko** – the growing Nordic production group is behind shows such as Discovery's *16 Ukers Helvete* (aka *16 Weeks Of Hell*) and they actively work with you and have international ambitions for their content, with unique formats like *True Colours*. This is a company you want on your 'regular' list.
- **European public broadcasters** – broad, I know, but you have to consider DR, NRK, SVT, VRT, BNNVARA etc. There is a reason they have distributors asking for exclusive deals. They have seasonal gems that have great central ideas and can be formatted!

Remember, all that we are looking for are original, returning formats not associated with talent but with plenty of international appeal. These creatives have as much chance as the groups of creating the next big thing and are even more incentivised to do it.

This is a relationships industry and so how big your network is really does matter - so let's support the creatives who keep going in this sometimes disheartening industry, who spam us with emails because they know one of those emails will one day work! Reward new ideas, originality will happen. **TBI**





Next-step innovation

Format creators are making the most of technology to come up with new formats that can also offer cost-efficient production techniques for buyers. Richard Middleton reports

The best formats tend to be the ones that can be explained within a single sentence. Add new technologies into the mix and describing just what the idea is can become a whole lot more complicated.

Perhaps that's why emergent tech has found it pretty tough going over the years when it comes to format creation. Social media was touted as the next big thing a decade or more ago when it came to engaging younger viewers with competition and reality shows, but as we get further into the second decade of the 21st century, the potential of tech is beginning to be seen on screen and off it.

Intelligent insights

Earlier this year, former Talpa exec and WeMake director Moe Bennani launched his Paris-based format outfit Dreamspark, but rather than looking to embed technology on screen, the aim is to incorporate it across the entire creative process to “enhance idea generation”.

“Our main mission is to produce entertaining universes in which fascinating universal stories can be told,” he tells TBI. “As we all know, tech is already present on screen. The avatars on [Talpa format] *Avastars* for example, or augmented reality (AR) on *Dance Dance Dance*.

“However, we have chosen to first incorporate tech off screen by implementing artificial intelligence (AI) in our deep process of format creation and selling. Our first AI prototype enables us to target the most relevant clients, based solely on the synopsis of the format.”

Launched with Julien Muresianu, co-founder of tech firm Lymia, Dreamspark now claims to have a development slate of more than 20 formats focusing on social experiments, reality competitions and dating reality series, with discussions underway with channels and streamers across EMEA and North America.

Another company using tech off screen is ITV Studios (ITVS), which is exploring the use of AI for content spotting as well as remote production for its shows.

But when it comes to content creation, Arjan Pomper, MD of global entertainment at ITV Studios, points out that it is an evolutionary process rather than revolutionary.

“We’re always looking to innovate our formats with technology, but technology is never a goal - it is always a means to bring those amazing stories to the world.”

Pomper highlights ITVS’s work on online game

Avakin Life and culinary format *Hell’s Kitchen* as one way in which the group is tapping tech for bigger audiences. *The Voice Of Avakin Life* resulted in almost two million singers from around the world performing hit tracks on an immersive virtual stage, while a collaboration with The Sandbox saw the first digital restaurant of *Hell’s Kitchen* transported into a virtual world.

“Our creative labels are also working together with ITV-owned Metavision to develop formats with the metaverse fully integrated in the storylines,” he adds. “Instead of ‘TV formats’, we prefer to speak about [just] ‘formats’ as the format has one overarching story, connecting different audiences on different platforms, including the metaverse.”

Details remain scant on how these formats might look – “we can’t say too much about it,” Pomper adds – but there are direct applications for existing IP and new ideas. “Imagine this: fans of a TV show play a game in a metaverse and they donate their points won to a candidate in the TV show. We see this as an innovation of the voting mechanism.”

Virtual worlds

Banijay is also investing in ideas that can be applied to new virtual worlds and has an initiative across its footprint designed to fuel creativity and come up with IP for the metaverse.

That’s in addition to what may seem like more prosaic uses of tech, such as virtual reality (VR) for example, which is being incorporated into formats such as *Your Home* and *Your Garden Made Perfect*.

“One of the most important things creatives need to consider is if the addition of tech is authentic to the original idea,” says Lucas Green, the group’s

“Our first AI prototype enables us to target the most relevant clients, based solely on the synopsis of the format”

Moe Bennani,
Dreamspark



Chiko’s Challenge, aka *Mapi*, opposite and below, features a half-CGI, half live actor quizmaster character





global head of content operations, adding it needs to come during the development process “to ensure genuine added value”.

“In *My Body Uncovered*, tech makes it possible to see inside the body as never before and, like with the previously mentioned titles, audiences get more of an immersive experience.”

Banijay is also using tech “to elevate entertainment formats”, with Green pointing to the hybrid AR set in *Limitless Win* that provides “a great way to build scale and spectacular visuals.”

Another intriguing yet hugely effective use of video technology is *Chiko’s Challenge*, which hails from NHK in Japan and was picked up by Ed Louwse and Julian Curtis’ Netherlands-based outfit Lineup Industries. It was subsequently sold to Spanish broadcaster RTVE, which worked with Lineup to create processes allowing it to shift from being a weekly programme to stripped weekly.

The format, known as *Mapi* in Spain, challenges a group of celebrities with child-like questions, which are often surprisingly difficult to answer. The twist is that the quizmaster is a five-year-old character named Chiko, who is half CGI, half live actor, and voiced by a famous comedian.

Curtis tells TBI about the format’s multiple uses of tech, not least the CGI host who can react in animated ways to the celebrities’ answers. “It creates lots of opportunities for social media, for example,” he says, with memes of the character dominating online around its airing. The central character also has her own social media accounts, with interactions driving interest and engagement.

But arguably, the real differentiator has been RTVE’s use of the format across the week. Because of that, the broadcaster and Lineup needed to come up with a way to create the CGI footage quickly, rather than employing the labour-intensive methods

My Body Uncovered offers a look inside bodies like “never before” in a TV series

“We’re always looking to innovate our formats with technology - but technology is never a goal, it is always a means to bring those amazing stories to the world”

Arjan Pomper,
ITV Studios



that had been employed on the original NHK show.

“The big thing is how we make [the CGI] happen in post-production,” adds Curtis of the motion capture tech, “how can we use the latest developments to make it possible. It’s almost live.”

Money talks

Curtis and Louwse point to the fact that the show is using techniques from movies, but, crucially, in a cost-efficient way for a public broadcaster. The duo add that much of the tech being used is likely to be found in most major broadcasters’ studios wherever in the world they may be, making the format’s potential globally more viable.

Pomper agrees that his group’s investments into AI for content spotting and the remote production of shows will also make format production more cost-efficient, and Green agrees.

“Once the tech is made part of the format it easily forms the exportable IP, which adds even greater value to our catalogue and the production bible assets, which can then be seamlessly streamlined from one international adaptation to another.”

Pomper adds: “There are also opportunities for advertisers. Last Christmas, the main sponsor of *I’m A Celebrity...Get Me Out of Here!* in the UK, John Lewis, created an *I’m A Celebrity* experience in *Fortnite*. You could explore a virtual castle with new challenges rolled out weekly. By playing these games in *Fortnite*, users got coupons for the John Lewis stores. John Lewis launched their famous Christmas commercial in this virtual castle as well.”

While such applications might be somewhat removed from the creative process of coming up with a new Saturday night gameshow, for example, they underline the potential avenues that format creators can now explore.

Bennani says AI offers huge potential for the format business, “to enhance creativity, sales and production” while Pomper adds that the metaverse, or virtual worlds, will enable creators “to bring a format across different touchpoints to connect different generations and bring them together as fans of your brand. We see the metaverse as the more affordable digital bridge between the linear passive viewer and the younger active user.”

“For us so far, it has been VR and AR. These areas have been a natural fit for imaginative fact-ent formats which explore the world and entertain with compelling narratives,” Green adds. “Having said that, we see scope for a completely new kind of entertainment in the metaverse and it’s a venture we are boldly looking at.” **TBI**

mip[®]

The **World's Largest** Entertainment Content Markets



mip[®]tv

**mipformats
mipdoc**

17-19 April 2023
Palais des Festivals,
Cannes, France



mipcom[®]
CANNES

17-20 October 2022
Palais des Festivals,
Cannes, France

mipjunior

15-16 October 2022
JW Marriott, Cannes,
France



mip[®] cancun

13-16 November 2022
Moon Palace, Cancun,
Mexico



mip[®] africa

6-8 September 2023
Cape Town, South Africa

Built by



In the business of
building businesses

MIPTV[®], MIPDoc[®], MIPFormats[®], MIPCOM[®], MIPJunior[®], MIP[®]Cancun,
OneMIP[®] and MIP[®]Africa are registered trademarks of RX France - All rights reserved

onemip[®]

The new online
global content
community



Uphill battle

Resilient, long-established formats and a desire for IP that can instantly cut through make for a tough market for new ideas. Richard Middleton hears how the industry is shifting

Format reboots have had their fair share of bad press over the past few months, notably at the Edinburgh TV Festival in late summer.

Yet the demands from broadcasters and streamers to have shows that instantly cut through the noise make them understandably irresistible to buyers, but is the trend softening? And what about the associated risks of rebooting a format that was last a hit a decade ago? Can this IP still do the business?

For Kevin Lygo, MD of media and entertainment at ITV in the UK, the format market continues to provide a key route to attracting large audiences. Yet he is clear that while the underlying IP is important, the bigger issue is how the format will be produced.

“The format is of course vital and it is the first block, but it is only 25% or 35%,” he told the industry at RTS London last month. “I am more interested in who will produce it and host it,” he added, with the comments coming in the midst of preparations to re-introduce one of the heavy hitters of the format

Survivor has turned 25 years old and is currently more successful than ever before

world - *Big Brother* - back into the UK after a five-year hiatus. Just how the rebooted show looks remains to be seen but Natalka Znak, CEO at Banijay-owned Remarkable TV Entertainment, Initial and Znak TV, rejects any notion that repurposing the IP for the new UK version, which she is overseeing, will be easy.

“It’s a hard job to reboot such a popular show... TV has moved on from when *Big Brother* was first on and we used to just love watching people eat their Cornflakes. The trick is to keep the heart of it and make it modern,” she says.

There are also balancing acts to perform with such a format, she adds, most notably drawing in the “hard core fans, who are saying don’t change it” while ensuring it also attracts new viewers. “My 16-year-old daughter doesn’t know what it is,” she adds.

It is an intriguing conundrum for Lygo, too, who explains that the show will sit on ITV2 and soon-to-launch streamer ITVX - rather than flagship linear network ITV - because of the likely ratings.

“ITV has to be all things to all people. We need mass appeal... although with ITVX we are moving into more niche shows that don’t need to have such broadness,” he adds.

Lygo adds that *Big Brother*, like *Love Island* - one of the commercial broadcaster’s biggest recent format hits, which also sits on ITV2 - finds a natural home from a scheduling point of view away from the main channel, partly because it provides some protection for the IP.

“Normally these shows get one or two million if you’re lucky so the danger is that if you had it on the main channel, there’d be talk it’s not working. And also, the way it works best is if you flood the channel and I’m not sure it would be appropriate for ITV, which has a public remit. Plus it could scare people.”

Reinventing the establishment

While *Big Brother*’s re-entrance to the UK has perhaps taken some domestic industry watchers by surprise, there are few raised eyebrows elsewhere.

K7 Media’s annual report on the top 100 travelling unscripted formats, *Tracking The Giants*, earlier this year revealed *Big Brother* had secured six new versions in 2021, in addition to a slew of renewals including in the US, where it’s into 25th season.

The report underlines the ongoing strength of well-established formats securing new commissions, with Sony Pictures Television’s evergreen quizzer *Who Wants To Be A Millionaire?* bagging nine new sales and Fremantle’s *Game Of Talents* snagging seven.

Such trends highlight the troubles facing format creators trying to push new ideas, although Lygo points to the fact that interpretation plays a key role when shows are being pitched.

“*The Masked Singer*, for example, was pitched to everybody including us and we turned it down,” he explains. “I was then shown a clip of the Korean version and it’s doing that that makes that particular show, it’s as important as the clockwork mechanics.”

Clearly, however, format success derives further from commissioning. Banijay recently celebrated the 25th year anniversary of adventure reality format, *Survivor*, by revealing it had had its most successful year-to-date last year, with 25 productions in 2021.

Yet that doesn’t mean commissioners aren’t on the look-out for new ideas – it just may take some time. Clare Laycock, SVP & head of content and planning at Warner Bros. Discovery UK, says the key for her company is to find shows that work as tapes and then move into local versions.

She points to *90 Day Fiancé* as an example. “That started in the US and we’ve now done 30 remakes, with a UK version that has been massive. We’re on that

“It is about finding the middle ground of keeping original formats and then adding layers onto them - that doesn’t mean you’ve run out of ideas”

Gama Gbio,
Expectation



journey but it has taken 10 years of heritage to get this many fans in.”

Znak and Laycock agree that creating a new format takes time and patience, most notably from the streamers and broadcasters buying the shows, and there’s no shortcut when it comes to creating a show that can travel.

Gama Gbio, Expectation’s development producer of entertainment, says: “trying to globally develop a hit comes afterwards. Even with a show like *Love Island*, the first version took a few seasons to become the hit we know. And then it became a global show.”

Gbio adds that for development executives, there is a balance to be found. “It is about finding the middle ground of keeping original formats and then adding layers onto them. That doesn’t mean you’ve run out of ideas,” she says, pointing to the dating trend of recent years that has delivered shows such as Netflix’s *Love Is Blind* and *Too Hot To Handle*.

Laycock adds that for many, including WBD, the aim is to “look after the big, valuable brands, which have been around a long time, but we need to refresh them with twists and talent.” And there are also new formats, she says, pointing to Discovery+ dating format *Written In The Stars*, which combines perennial favourite dating with astrology. “These are risky, they’re big swings and you go in with your heart in your mouth a bit.”

And while breakthrough formats on the global stage are few and far between – arguably *The Masked Singer* has been the only real success of the last decade – it is clear to see why.

“We are quite brutal, I admit it,” Lygo says. “If a show doesn’t work early on, we kill it. In the old days you could adapt, but now I don’t do an entertainment show without a proper fully funded pilot.” And as competition between streamers and broadcasters continues to rise, there is no reason why that particular format trend will end any time soon. **TBI**

Celebrity Survivor Italy is one of the 25 versions of the format in production last year



Formats Hot Picks

Our pick of the latest, greatest formats heading to market

Top
Pick

Finder\$ Keeper\$

Producer: PIT

Distributor: Be-Entertainment

Broadcaster: VTM (Belgium)

Logline: Families get 30 minutes to hunt down cash prizes hidden in multiple locations around their own homes - but finding the cash will be far from easy

From the minds of *Send in the Clowns* creatives Kamiel De Bruyne and Wannes Deleu comes this new entertainment format, with a straightforward premise and a huge potential for comedy chaos.

Fortunate families get the chance to win up to €100,000 (\$97,000), so long as they can find it. The cash is hidden in various locations around their own home and they get 30 minutes to hunt it down and keep as much as they can find.

However, the task isn't as easy as it sounds, with the cash hidden in myriad locations, ranging from inside sealed bags of cereal to the inside of an unopened bottle of wine, within game consoles or behind a newly built fake wall.

After 30 minutes, the buzzer sounds and the family has just 10 seconds to leave the house, otherwise the prize money they've grabbed will be halved.

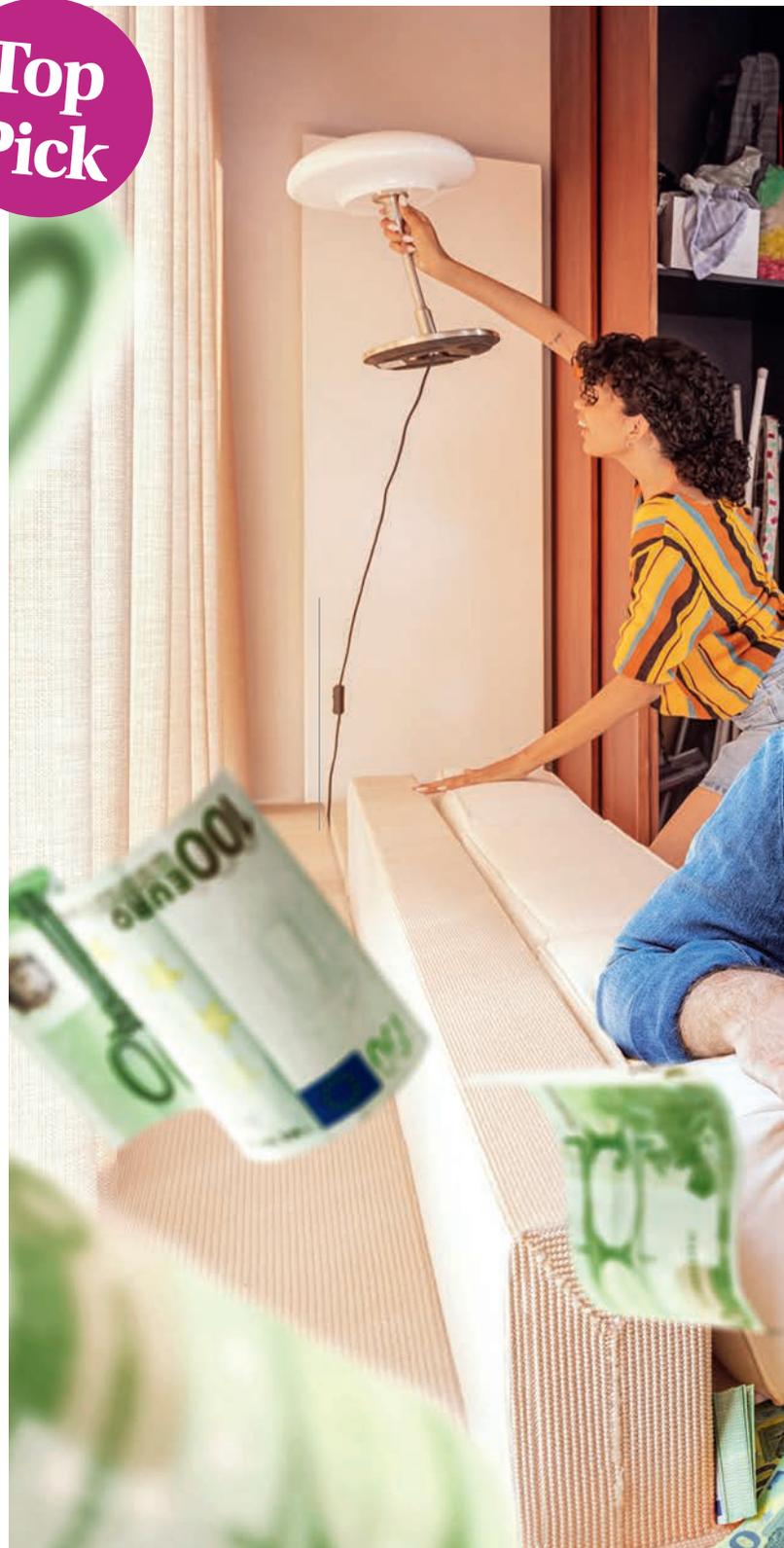
"Our expert team of hiders create the craziest hiding places," reveals Be-Entertainment MD Gepke Nederlof. "They take objects from the house and replace them with replicas that are just slightly different from the

original so the family can't notice them - like a Buddha statue that is wearing a small gold necklace with a dollar sign on it. Or a bottle of wine from 'Chateau D'Argent'."

Nederlof reveals that a big part of the entertainment comes from how the different family members approach getting their hands on the cash. "We love the dilemmas and the way they are handled differently by other family members. Like a champagne tower on the kitchen table with money underneath... the woman of the house carefully takes the tower down glass by glass, where the man just shoves the whole tower on the ground and gets the cash."

She adds: "We've already seen hilarious scenes and hiding places in the first episode and there is a long list of dilemmas and hiding places that will be shown in the full series that is now in production."

Highlighting the format's international appeal, Nederlof says: "The idea is very simple and most of all entertaining. This is not like anything we've seen before. The humour and lightness will hopefully make it stand out from others."





Home Tutor

Producer: Nippon TV

Distributor: Nippon TV

Broadcaster: Nippon TV (Japan)

Logline: Scripted format in which three families receive help from a home tutor that provides them with some important life lessons

This scripted format tells the story of three mothers and their children, all of different ages, as they deal with common life problems and who are saved by a peculiar home tutor.

The women are from diverse backgrounds, but are united in dealing with the pressure of motherhood and the hope of getting their children into their dream schools. With the help of a home tutor, the families learn valuable life lessons.

“Times are always changing but one very important, constant life lesson would be ‘how to use money wisely’. The team created a story where the



student, as well as their family and even the tutor herself, changes drastically after going through her peculiar but unique life lessons focusing on money and life decisions,” Yuki Akehi, director of international business development at Nippon TV, tells TBI. “Watching and following

this process, viewers of the series will sense a feeling of hope, which is what the team wanted the viewers to experience.

“At the end of the series, audiences who have seen this drama will want to meet the tutor again. The tutor herself knows that money is just an

object, something neutral to anyone. How someone spends money is up to them. Thus, students (and the viewers) learn through her about the importance of spending money wisely, how one must feel towards it and how to use it in order to live a life well spent.”

Art On The Brain

Producer: BBC Studios ANZ

Distributor: BBC Studios

Broadcaster: ABC (Australia)

Logline: Social experiment testing if the simple act of creativity can help heal the invisible wounds of poor mental health

This new 6 x 60-minute fact-ent format follows people facing mental health issues who aim to better their lives through art - guided by a psychotherapist and acclaimed artists.

Sumi Connock, creative director of formats at BBC Studios, tells TBI: “Our development team was aware that while there were a lot of campaigns and initiatives in Australia surrounding mental health awareness, cases of suicide were still increasing at an alarming rate. They felt that now was the time for TV to help

remove the stigma of mental illness and explore activities that could have a positive impact on people’s health and wellbeing.”

Connock reveals: “The team’s research from around the world uncovered the positive impact that art therapy could have on mental wellbeing, and that’s when *Art On The Brain* (or *Space 22*, as the show was known in Australia) started to come together.”

Casting producers worked alongside a specialist Australian mental health organisation. Shortlisted contributors

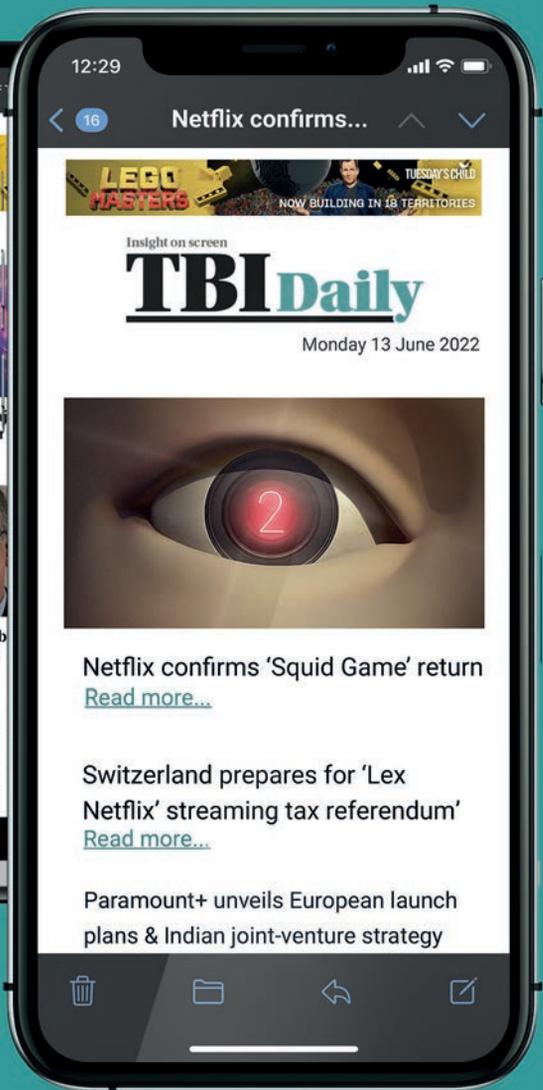
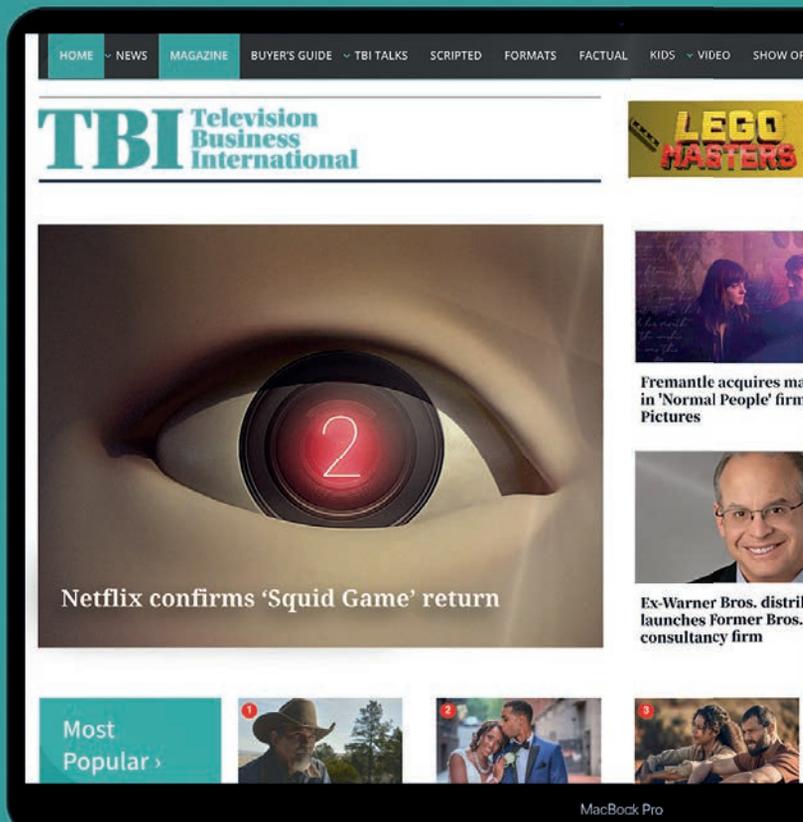


underwent rigorous psychological testing with a psychologist before being cast.

“Mental ill health is a global issue, made worse by the pandemic. One in four of us will experience symptoms of mental illness in any given year and *Art On The Brain* offers hope for the 900 million people

worldwide who are suffering right now. This format is a unique, uplifting and ambitious social experiment to see whether art can help heal the mind. It’s also backed by scientific research which monitors real results for the participants as they are surveyed at the beginning and the end of the experiment.”

TBI Television Business International



Stay informed with the latest TV programming trends and developments, as well as the day's breaking news stories via the TBI Daily newsletter - delivered straight to your inbox!

SCAN THE QR CODE TO SIGN UP
tbivision.com/newsletter-registration



Hungry For Love

Producer: Sipur, HSCC

Distributor: Sipur

Broadcaster: HOT (Israel)

Logline: Reality dating show meets psychological experiment as couples looking for love must go on a date every time they get hungry



This one is a reality dating show with a psychological experiment twist. The premise connects physical and emotional hunger, claiming that if people become as active looking for love as when looking for a meal, chances of finding love increase.

Therefore, the series has only one rule - no one eats alone. If participants are hungry, they must go on a date. One bachelor and one bachelorette, guided by a professional therapist, will participate in the experiment with the goal of dining their way to romance.

The format stems from a co-development deal between Sipur and Stampede, with Sipur's head of unscripted, Zipi Rozenblum, the creator.

"Our show is not fully casted a priori, we are covering our protagonist's authentic search for a meal date and follow how their stories further develop," reveals Sipur's Michael Schmidt, who executive produces.

"We do not know whom they

will meet and have not designed or pre-produced the dates, that is all in our participants hands.

"The show is engaging and surprising, it feels real and authentic. We feel with, and root for, our protagonists and want to see them being successful in their quest for love."

Schmidt says that the format is a "noisy idea on the surface", but its conceit allows producers to "tell intimate stories of lovable characters that make us laugh and cry."

It's a premise that should be internationally appealing, he says. "Simple, yet universal and approachable - it can be done everywhere by everyone."

He adds: "On top of that, and unlike some other more complicated dating formats, everybody at home can try the scheme of *Hungry For Love* for themselves and see what happens to their dating life."

The show will make its global debut on Israeli platform HOT later this year.

Le Plus Grand Karaoké de France

Producer: DMLSTV

Distributor: Banijay Rights

Broadcaster: M6 (France)

Logline: Musical competition show of massive scale as 6,000 people perform karaoke, but only 1,000 among them have microphones – and judges choose who is the best singer

Another singing format, but this one sees 6,000 people belt out songs as part of a giant karaoke event. Among the participants, only 1,000 will be equipped with headsets and microphones. Behind the scenes, experts - singing teachers, musicians and vocal coaches - have the task of selecting the best as the four rounds of the competition roll.

The stakes get higher throughout the show, with the finalists given the opportunity to perform a duet on stage with a star before one contestant is named the best karaoke singer. "We wanted to create a big music show where everyone could be involved: the artists on stage, the audience and the viewers at home," reveals Mathieu Vergne, president of DMLS TV. "We knew this show would be popular as the audience's need to party, sing, and be together has never been stronger," he adds.

Vergne describes casting so many people as a "huge task" which involved contestants

sending in videos of themselves singing.

"For us, it wasn't just about finding the very best singers or performers, but making sure the participants represented a real cross-section of our society. We have a diverse range of participants who all share a passion for singing and music.

"The strength of this show is everyone has a chance to participate, with 1,000 people mic'd up to sing on stage - this really brings a positive atmosphere of the show."

Vergne tells TBI that the format is "very ambitious, in its scale both visually and in the number of participants, and its use of technology. We had 1,000 contestants with a microphone connected to their mobile, which allowed experts backstage to hear their voices and judge who should go through to the next round.

"We had to get used to this brand-new technology and determine areas of the software that could be made more efficient for future shows."



SERIES 2 COMING SOON

SERIES 1 NOW ON BBC, HULU, CANAL+, ZDF, ABC AUSTRALIA,
YLE, NRK, SVT, E-VISION, AND TELE QUEBEC



S I L V E R P O I N T

© Zodiac Kids Studio UK Limited 2022
A Zodiac Kids Studio production for the BBC and ZDF German Television Network
and ZDF Enterprises GmbH in association with Northern Ireland Screen





Coming of age

YouTube is celebrating a big birthday next year and ahead of the occasion, Helen Dugdale explores what the platform offers that others can't and what 'traditional' TV can learn from its success

Next year will mark the 18th birthday of YouTube and with billion upon billion of views, it's hard to imagine life without it. For content creators, the Google-owned streamer offers almost zero barriers to entry with their shows, few restrictions on length and allows them to reach niche audiences. Users, meanwhile, can easily access content from around the globe and develop a close relationship with their favourite creators.

In many ways, it's a win-win on both sides of the screen – as well as a way to grow programming, particularly of the kids variety.



Ferly, a Finnish animation studio and brand-building company that specialises in storytelling through TV and film, has a handful of shows sitting on the platform and targets audience growth via its YouTube strategies.

“Our aim with our YouTube content is to engage with fans, but obviously at its best, content drives both engagement and revenue,” explains co-founder Laura Nevanlinna.

“We have the short-form of our pre-school brand *Momolu & Friends* out on there. *Star Stable: Mistfall* is a short-form series we developed and produced with

Doggyland was backed by rapper Snoop Dogg and launched straight to YouTube - its creators have no immediate plans to place it anywhere else

“We said let’s go ahead and invest in the show ourselves and put it on YouTube. Down the road, we may do something with traditional TV - but we just really wanted it so everyone could watch it”

Claude Brookes



gaming company Star Stable and is available in three languages,” she adds.

Straight-to-streamer order

Seasoned industry figures also increasingly favour placing content on YouTube rather than going straight to public service broadcasters or streamers. The Emmy-nominated producer and creator of children’s franchise *Hip Hop Harry*, Claude Brooks, partnered with rapper Snoop Dogg, on a new show called *Doggyland*, which launched straight to YouTube in August.

The show features a colourful cast of dogs who use songs, dance and rap to teach social, emotional, and cognitive skills aimed at toddlers to eight-year-olds.

“*Doggyland* just organically developed by working alongside Snoop Dogg. It is led by a cast of dogs that teach kids about social and emotional skills through dance and song. Snoop voices the main character, Bow Wizzle, who serves as the adult mentor to the rest of the cast. It took about a year to make and we’ve already got over 30 episodes and creating more. There is a new drop on YouTube every Tuesday.”

Kris Maric, founding CEO and executive producer at Australian-based virtual production services Fika Entertainment, who has worked on programmes such as *Scream Street* and ABC’s *Mini Beast Heroes*, adds that the platform can also act as a springboard for doing more things with IP.

“We’ve seen that the digital-first approach is the future of content creation because it has enabled many to generate meaningful income and to explore their creative voice in a dynamic and agile way,” she says.

“It is also a gateway to enabling broader monetisation opportunities off the back of YouTube-launched content through other digital experiences such as games, apps, eBooks and music.”

With a household name like Snoop Dogg attached to *Doggyland* and Brooks’ experience, people would be forgiven for asking why they decided to go straight to YouTube with the new show. Surely with their contacts, they could have caused a bidding war between streamers and broadcasters, knowing the audience the show would instantly pull in?

“It was always about access and letting every child be able to enjoy the adventures of *Doggyland*.”

“We said let’s go ahead and invest in the show ourselves and put it on YouTube. Down the road, we may do something with traditional TV. But we just really wanted it so everyone could watch it. We’re not looking to build an audience on YouTube and then move on. *Doggyland* is always going to be a YouTube and YouTube Kids show.”

Brooks adds that if offshoots of *Doggyland* happen,

Adventures With Auntie Ada hails from Fika Entertainment, which believes that the digital-first approach is the future of content creation



“There is a whole world out there that loves and embraces diversity and gender-fluid stories. YouTube does a great job of enabling both of those audiences”

Kris Maric,
Fika Entertainment



organically with other channels or platforms, the team would be open to having conversations.

From its offices in Finland and Canada, Ferly, has worked on an array of shows, including animation *Kingdom Of Nom*. The company aims to create storylines that show characters in ways that reflect the fluidity of gender and avoid creating stereotypical behaviour – and Nevanlinna believes YouTube is the best place to do that.

“It’s a place that allows for more freedom of exploration in storytelling when it comes to length of content, language and non-verbal etc, and this absolutely encompasses going beyond the dichotomy of male and female in character building.

“YouTube as a platform doesn’t need to directly answer to a corporate board or a set of partners wishing for certain types of content, the creators can be more inclusive and build characters that aren’t especially one or the other but maybe more one and the other.

“I feel that young children do not consider gender as a decisive factor in a person or character, so the possibility for content creators to use YouTube as a platform mirroring this reality is wonderful.”

Direct demand & lessons

For Maric, YouTube’s appeal is clear: it shows to the world what the audience really wants. “It has allowed freer market space to allow diverse and gender fluid creators, their stories, and characters to have no barriers to release, nor barriers to being watched.

“There is a whole world out there that loves and embraces diversity and gender-fluid stories. YouTube does a great job of enabling both of those audiences.”

Clearly, there are millions of hours of content on

YouTube that receive few views, while quality levels vary dramatically. But what can the likes of public broadcasters learn from content creators who are sitting between traditional channels and YouTube with shows in both worlds?

Brookes adds: “Channels and streamers are trying to find things that feel unique. I say if you can hit your content lane and stay in it you’ve got a better chance of pulling other people in from different lanes, which is what makes the experience that much more special. *Doggyland* has a specific point of view.”

Maric compares traditional TV to the cinema a couple of decades ago. “It’s become a premium space where a series launch is like a major event that has a global community excited to share its anticipation of and then watching it.

“We think it would be good to have access to better data on the performance of these series so creators could feel more confident that they are building and pitching the shows that people genuinely want to buy and watch.”

After almost 18 years, the Google-owned streaming service is interwoven with the world of content creation. For Nevanlinna, YouTube provides kids with direct access to new ideas whenever they want it, something that broadcasters can learn from.

“Many traditional broadcasters also offer content online on either their channels or YouTube. Whether it’s the same content everywhere or different on each platform is an important decision to make. Shorter episodic lengths work better online,” she points out.

And while billions of hours of content is good, TV retains a vital role, she adds. “What traditional TV at its best can do is the same thing publishers do: offer a curated experience and quality content on both their linear and their digital platforms.” **TBI**

78x7'



KARATE SHEEP

READY TO BE WOOLED?



Come & See us at Mipcom!
STAND R7.J9

© Xilam Animation

NETFLIX

SUPER RTL

CNC

Co-funded by the
European Union



Xilam

The winds of change



Hoho Entertainment's joint-MD Oliver Ellis tells Mark Layton how *Toad & Friends* will both honour and update *The Wind In The Willows* for a new generation

Among the children's series headed to market in Cannes this year is a new adaptation of a British literary classic in Hoho Entertainment's *Toad & Friends*.

The London-based firm has spun Kenneth Grahame's beloved 1908 fable *The Wind In The Willows* into a 52 x 11-minute CG animated series that Hoho's joint-MD and producer Oliver Ellis tells TBI remains "true to the spirit of the book and the characters", while adding some much-needed diversity to bring it up to date for modern audiences.

The original story follows the adventures of riverbank residents Mole, Ratty and Badger as they try to help the irascible Mr Toad of Toad Hall when his obsession with vehicles lands him in trouble with the law.

As Ellis notes: "There are very few female characters in the book and certainly not central ones, so we have changed that in our series adaptation, with Hedge

(Seána Kerslake), our feisty cheery hedgehog joining the trio of Mole (Rish Shah), Ratty (Reuben Joseph) and Toad (Adrian Edmondson), thereby making a strong quartet of primary characters.

"Other female characters include Mrs Otter, who was in the book, but we make more of her in the series, and the new characters, Tinker, Heron and Adder."

An essential addition

Amid the current push for diversity both on-and-off-screen, children's programming is among areas where such change is most crucial.

As Ellis highlights: "The book was written in 1908 in a much more paternalistic society than we have now, so it wasn't just important, it was essential to make changes to better reflect 21st century society."

Alongside the addition of "eternal optimist" Hedge



to the main cast of characters, Hoho has also created “Heron the taciturn delivery bird, Adder the self-serving opportunist, Tinker the clever-but-scheming weasel and Mrs Otter, the maternal figure of the riverbank.

“They all fit into the setting and amongst the other characters very naturally and serve as a seamless extension of the line-up of characters from the original book,” says Ellis.

The producer reveals that Hoho, which is also behind *Cloudbabies* for Cbeebies and *Shane The Chef* for Channel 5’s Milkshake!, has a commitment to diversity that extends off-screen as well “from the writing team, casting and throughout the production team.”

Familiar icons

Animated in Scotland by Wild Child Animation and directed by Tim Searle (*Danger Mouse*, *Dennis And*

Gnasher), the series is not a direct adaptation of the novel, but rather an extension of the source material that follows the characters in situations both new and familiar.

Ellis explains: “Although these are 52 new stories, we were keen to continue giving nods to the original book. For instance, in the episode *A Lick Of Paint*, we see Mole whitewashing his front step, which is a nod to the very beginning of the book.

“Toad in the book has a passion for anything new, particularly the motor car. This continues in the series with Toad loving his car obviously, but he’s also driven to enthusiastically embrace a hot air balloon, his own specially designed boat and his power kite; all with the same feckless passion and zeal that we have come to expect,” he says.

Ellis adds that the traditional villains of the story, the weasels, will also return: “At the end of the book, the weasels are chased out of Toad Hall by our hero characters led by courageous Mole. In the series, we return to this theme with the weasels constantly trying to get into Toad Hall and get the better of Toad, always with disastrous consequences.

“We have also made much more of the weasels’ individual characters, who provide an additional comic element to the series.”

Acquisition opportunity

Toad & Friends has already been picked up by Warner Bros. Discovery for pre-school brand Cartoonito across EMEA and on streaming service HBO Max in Europe for a 2023 debut, with Ellis describing the media giant as “terrific partners throughout.”

However, for any buyers out there whose interest has been piqued, linear broadcast rights to *Toad & Friends* are also still “broadly available” in those territories, as well as all rights outside of EMEA, as of the time of writing.

Some episodes are now complete and have received “very positive feedback” after being shown to broadcast partners, says Ellis, who confirms he will be treading *La Croisette*, with Hoho’s new riverbank friends in tow. **TBI**

Toad & Friends adds new characters to the familiar setting, for a diverse cast



78x7'

ZIG & SHARKO

New Season!



Watch out!
Mermaid on legs!

© Xilam Animation

COME & SEE US AT MIPCOM! • STAND R7.J9

Xilam

Cultivating curiosity

With parents acting as gatekeepers to kids' content consumption and young viewers often stuck on their old favourites, Mark Layton finds out how streamers and broadcasters go about getting children to move on to new shows

As any parent can tell you, getting a young child to move on from their favourite shows and try out something new can sometimes be a bit of a challenge.

Linear programming blocks with a set schedule make this process simple, but when the possibility of binge watching is available, it can become a whole different ball game.

Unsurprisingly, streamers and broadcasters want to make sure that young audiences are watching their latest original productions and acquisitions, but despite the anecdotal evidence, just how much of a problem is discoverability?



Stephen Mowbray, head of series & kids, Viaplay Group

“Every viewer is unique, regardless of age. But in general, we don’t see any major difficulties in introducing younger Viaplay viewers to new shows,” reveals Mowbray. “It’s true that some titles always seem to be at the top of the viewing charts.

“However, that’s just as much about their quality and broad appeal, as it is the same viewers watching them over and over.

“Kids grow up quickly and are usually open to something new that matches their own developing interests,” adds Mowbray, whose Viaplay Group teamed with Moonbug to produce *Mia’s Magic Playground* (pictured, below) and is soon to launch *Karma & Jonar*.

“We’ve learnt that the more visible we make a series on Viaplay, the more likely it is that kids will watch it. Positioning new content by featuring it at the top of our landing page when it premieres, followed by suitable blocks and promos over the following weeks, is one proven approach. We also see positive viewing levels for new shows that are based on a well-known brand.”



Monika Oomen, VP, brand, communications and franchise management, Warner Bros. Discovery

“Firstly, it’s important to note that kids, and pre-schoolers especially, do love to binge watch and this, in many ways, is a very positive habit,” says Oomen. “It’s born out of comfort rather than boredom and creates a strong emotional connection between the audience and the brands and characters they love.”

She explains: “When introducing new content to pre-schoolers, parents are the gatekeepers, and as much as they listen to their child’s preferences, they have ultimate control over what their kids watch. As such, we consider a dual audience in marketing and communications when introducing any new show – the kids and their parents. The amount of content offered to kids at home is overwhelming and the challenge is to be heard and seen amongst all the noise.”

Kids and parents are more likely to try something new from a brand they trust, notes Oomen, highlighting the power of a portfolio of known brands, such as Warner Bros. Discovery’s Cartoon Network, Cartoonito, Boomerang, Boing or HBO Max.

“It helps if that world or characters already resonate with parents too. That’s why we’re launching pre-school iterations featuring some of our best-known and most loved global franchises with brand new preschool series *Batwheels* (pictured, above) and *Bugs Bunny Builders* set to premiere in the next few months across EMEA.”

**Shannon Friedrichs-Higdon,
SVP of content & brand
strategy, kids & family,
Paramount Global**



“I would argue that young children are amongst the most content curious viewers I’ve worked for. Their tastes are just forming and, as such, they are very open to experiencing new things. It’s up to us as content creators and programmers to serve them lots of different types of programs,” says Friedrichs-Higdon.

“This is not to say that young children don’t have strong opinions or that they don’t have favourites,” she adds, with titles such as *PAW Patrol* and *The Patrick Star Show* (pictured, right) performing well for Paramount’s Nickelodeon.

When it comes to introducing young viewers to new content, Friedrichs-Higdon suggests: “You really must go where the audiences are. Increasingly, this means a diverse mix of linear (pay-TV & FTA) and streaming (SVOD & AVOD), paid and organic media placement. If you are building a franchise, you need to reach the broadest possible audience as quickly as possible, so ubiquity is key.”

However, she adds, “if you were asking me how to build a platform or a channel brand, I would be telling you the opposite - exclusive content is key to a unique USP. There is a natural tension between these competing goals and that’s where a content strategist with brand expertise can help you define which partners and platforms are best positioned to help you reach the biggest (and most aligned) audiences for your content.”



**Katie Wilson, VP of channels
& global acquisitions,
WildBrain Television**



“Discoverability is always top-of-mind, given the range of entertainment choices available for kids and families to engage with content, both in terms of the different platforms where content lives and also the volume of programming,” says Wilson, who is currently seeing titles including *Curious George*, *Mighty Mike*, *Caillou*, *Grizzly And The Lemmings* and *LEGO Ninjago* (pictured, left) performing well with young audiences on Wildbrain.

“When it comes to new exclusive titles, the connection takes longer than it would with an established show – this investment in time is key,” she adds.

“When building an audience for new content, it’s ultimately about being flexible and creative in your approach. For example, insights from WildBrain Spark, our digital media team, can develop our understanding of how to engage kids through digital and social platforms, supporting the awareness of the shows on our channels and driving their long-term success.” **TBI**

78x7'

OGGY

AND THE
COCKROACHES

NEXT
GENERATION



A fresh look for a New Generation!

© Xilam Animation

COME & SEE US AT MIPCOM! • STAND R7.J9

Xilam

Kids Hot Picks

The latest kids shows heading to market





Top Pick

Karate Sheep

Producer: Xilam Animation

Distributor: Xilam Animation

Broadcaster: Netflix

Logline: Hybrid animation following an over-enthusiastic sheep whose antics keep causing trouble for the rest of the flock

Created by Xilam's Hugo Gittard (*Zig & Sharko*, *Mr Magoo*), this 78 x 7-minute hybrid of CG, 2D and stop-motion animation is a non-verbal slapstick comedy following Trico, an enthusiastic sheep who loves to share new objects and ideas with the rest of the flock.

Unfortunately, this causes problems in the mountain pastures for Wanda, a tough ewe whose job is to keep the sheep safe from a nearby hungry wolf.

Morgann Favennec, EVP of distribution at Xilam Animation, says that the show is a "unique and engaging blend of themes - there's friendship, teamwork and accepting the differences of others, but there's also martial arts, plenty of humour and a celebration of nature in the mix too."

The exec adds: "Through the adventures of Trico, Wanda and the flock, the series really promotes the importance of sharing and listening to each other, as well as sticking up for those who may need a bit more help.

"For example, we see Wanda not only helping her

fellow creatures, but also the wolf when he's in difficulty."

Favennec expects the series to be a hit with kids who "are going to love the endearing and varied characters in *Karate Sheep* - there's Trico who is a showman at heart and promises progress, novelty and fun, but without considering the consequences. Despite having the best intentions, Trico's often the root of all the chaos happening in the mountain, resulting in some very humorous situations.

"Then there's Wanda who is a natural-born leader and doesn't let anyone walk all over her - she's actually a martial-arts expert and will knock you flat in two shakes of a lamb's tail!

"Then of course, there's Wolf, who is the time-honored predator of the pasture, and there's the [wider] flock who tend to think and react as one, with a routine that revolves solely around grazing and sleeping."

The show, which is aimed at 6-9-year-olds, is set to make its global debut on Netflix next year, although second-window linear rights are still up for grabs at the time of writing.



Big Nate

Producer: Nickelodeon Animation Studio

Distributor: Paramount Global Content Distribution

Broadcaster: Paramount+ (US)

Logline: Animation about the misadventures of sixth-grader Nate Wright and his friends

This US animated series follows the adventure of Nate Wright, a precocious 11-year-old boy, and his best friends, as they navigate the challenges of sixth grade.

“Whether he’s dealing with disasters at home or detention at school, Nate is no stranger to a challenge,” explains Lauren Marriott, SVP of content partnerships & brand strategy, Paramount Global Content Distribution. “Luckily, he’s able to express himself through the world of cartoons that he creates. Charming, mischievous

and a magnet for misadventure, Nate always finds a way to turn trouble into fun.”

Marriott says that *Big Nate* owes its legacy to the Nickelodeon series of the 1990s - “shows that were not afraid to push the envelope with both storytelling and design.”

“The sole purpose of the show is to make people laugh, which seems like something everyone can get behind after the last couple of years.”

Marriot reinforces that comedy is “the pillar of the



series” and says that while children will enjoy the hijinx that Nate and his friends get up to,

she adds that “all of the stories are wrapped in love, acceptance, and understanding.”

The Smeds & The Smoos

Producer: Magic Light Pictures

Distributor: Magic Light Pictures

Broadcaster: BBC One (UK)

Logline: Two bickering families of aliens learn to put aside their differences in this adaptation of the Julia Donaldson and Axel Scheffler story

The UK’s Magic Light Pictures continues its successful run of Julia Donaldson and Axel Scheffler adaptations with this

new one-off half-hour animation.

Due to premiere on BBC One in the UK this Christmas, it follows the story of the red

Smeds and the blue Smoos, who are longstanding enemies on their far-off planet.

However, when a chance encounter between young Smed Janet and young Smoo Bill leads to romance, it results in a great intergalactic adventure - and two families who must learn to understand and work together for the very first time.

Producer Barney Goodland tells TBI that the story shows viewers that “differences are to be celebrated and something that makes life magical. The Smeds and the Smoos learn that through their bickering they lose the people they love and feel worse as a result. By working together and accepting others they all get to enjoy themselves and experience new things.”

Goodland adds: “On their journey, the Smeds and Smoos also visit lots of incredible planets and meet new aliens. Similarly, we hope that this will leave young viewers feeling excited

about discovering new cultures and the benefits of doing so.”

This is now Magic Light’s 10th adaptation of a Donaldson/Scheffler book and Goodland praises the source material as “engaging and wonderfully imaginative” and for creating “exciting worlds where children want to spend time.”

“Our goal with the specials is to take that experience further and develop the story into a half hour animation for families to enjoy and bring them into the world they know and love.”

Goodland adds: “The look and colour palette of the special is quite incredible, and it’s been a great challenge designing and building all the planets – there’s even one made out of slime!

“We’ve loved creating a universe where lots of things feel familiar, but that are all slightly alien. Every shot is enchanting with something amazing to look at and you can almost touch and feel what’s on screen.”



Happy The Hoglet

Producer: Paper Owl Films

Distributor: Aardman

Broadcaster: CITV (UK), RTÉ Jr (Ireland), S4C (UK)

Logline: Pre-school animated series following the adventures of a prickly hedgehog and his friends, whose experiences reflect the emotional ups and downs that young audiences are coming to grips with in their own lives

New 26 x 7-minute animated series from Paper Owl, the Northern Irish firm behind popular BBC series *Pablo*.

Set in the Sunny River Community Garden, the series follows Happy, a little hedgehog with big feelings.

Through their adventures, Happy and his friends reflect the emotional ups, downs and everything in between, that are experienced by pre-school audiences; from feeling excited to feeling angry to feeling like you just need a quiet minute.

“The stories are very relatable to the audience, ranging from feeling guilty about hurting a friend, to giving something a go even if you aren’t good at it yet, dealing with being overwhelmed and celebrating the joy of feeling happy with your friends,” Paper Owl Films’ producer Grainne McGuinness tells TBI.

“Each episode of *Happy* explores different emotions, and models how to acknowledge, accept and share these feelings. For young audiences, Happy names and validates feelings they may encounter in their own lives. For co-viewers, watching *Happy The Hoglet* with their child will spark conversations about emotional wellbeing.”

McGuinness describes the series as “more than a TV show - this is a global movement for ‘Making Happy’.”

She adds: “The characters are really funny, the stories are relatable and the world of the show is stunning.”

“There’s danger and scary, there’s music and laughter, comfort, joy and true friendship. It respects the emotional intelligence of the audience and reassures them about their own feelings,” McGuinness says.



Biff & Chip

Producer: BBC Studios, Kids & Family Productions

Distributor: Jetpack Distribution

Broadcaster: CBeebies (UK)

Logline: Live-action kids series based on the phonics books, following youngsters who come up with interesting scenarios through their play - and often turn small disasters into big adventures



Kids and parents in the UK will recognise *Biff & Chip* as being based on the Oxford Reading Tree phonics books that are commonly used to teach children to read in schools.

This live-action series extends their world to the screen for “pure entertainment” with a focus on children, their family and friends, spending time together, having fun and coming up with interesting ideas through creative play.

The young characters will go on such adventures as: “losing their cuddly toys while playing detectives, which turns them into real detectives to solve clues and find the toys,” reveals Jetpack CEO Dominic Gardiner.

He tells TBI: “In one episode they think they have made their dog disappear while playing magicians!”

“The kids also do thoughtful and kind things like make a restaurant at home for their

parents, who are not able to go out.”

What sets this show apart from other kids series is its “strong focus on real kids having fun and playing, as opposed to being focused on aspirational characters such as superheroes or being overly educational,” says Gardiner.

“It’s a mix of relatable situations and imaginative, sometimes magical, solutions or explanations.”

He describes the series as “a warm, family focused comedy drama” and explains that during the kids’ playtime: “Invariably something unexpected or funny happens and characters come together to make things right or turn a disaster into a fun adventure.”

“It’s especially interesting for children to see popular book characters come to life through live action, as opposed to animation.” **TBI**



Last Word Shaun Keeble

How finished tape on FAST can fuel formats

“Essentially, FAST channels are an effective way of keeping the shelf lives of TV shows going, reaching out to an audience who may not be necessarily watching on linear television”

The news that *Survivor* will return to UK screens after a 20-year hiatus is nothing short of a tremendous coup for all involved. The international TV industry’s warm reception to this announcement is testament to the legacy of this iconic entertainment format, which has seen 50 adaptations since its debut in Sweden back in 1997, following its creation by producer Charlie Parsons.

But let’s rewind 25 years. At its inception I’d dare bet not a single person in our business could fathom how this extraordinary piece of IP could expand beyond the traditional linear television environment to become a shining light - or torch (if you will) - in the digital channels portfolio of the world’s largest independent producer-distributor.

Of course, the notion of a FAST channel back in the 1990s was unimaginable. Yet one theme that was as relevant in 1997 as it is today, is ‘key, recognisable IP’. Those who know me realise I talk a lot about this when proceeding to launch any new FAST channel. I’ve always maintained it is paramount to have market awareness and recognisable content to offer a lean-back viewing experience and to attract that new, fresh, audience at a time when so many media firms are flocking to this space.

Survivor, with its incredible global influence, delivers this in abundance for Banijay Rights’ digital operation. This was proven in February 2022 when our *Survivor* FAST channel launched across Samsung TV Plus UK, alongside our other recognisable brands: *Deal Or No Deal* and *McLeod’s Daughters*. Since then, more than 17 million minutes have been viewed on the UK channel – which, to date, has over 210 hours of content scheduled at any one time. And there’s plenty more scope to launch the channel across other platforms in the UK and beyond in the coming months.

But why’s all this important for a global producer-distributor like ourselves?

To put it simply, *Survivor*’s success in the FAST channel realm highlights the importance of leveraging finished tape content across huge formats into the digital space. In essence, if we want to expand on Banijay Rights’ 15 unique live channels and 47 syndicated feeds, single recognisable IP like this long-running format is essential to our ambitions. It’s important to have that much-needed scale in big markets like the US, the UK and Germany, which will continue to drive those strongest returns to companies like ours.

It’s also worth bearing in mind that FAST channels are an incredible way to further monetise back catalogue titles, which are perhaps in their third or fourth window relicenses. I’m not drawing back the curtain too much here, but a brand like *Survivor* can actually spearhead our portfolio and send ripples down to our relatively smaller IP, which can - in turn - make gains off the back of this. Essentially, FAST channels are an effective way of keeping the shelf lives of TV shows going, reaching out to an audience who may not be necessarily watching on linear television. Not that they won’t be watching *Survivor UK* on the BBC of course!

Indeed, these channels continue to be the key evolving distribution proposition that allows us to generate incremental revenue outside of traditional finished tape sales.

Now entering a new dawn, *Survivor* is without doubt a key contributor in driving these returns, as we look again to increase viewership across our combined channels next year (beyond 2022’s mark of 50 million hours).

So, allow me to be one of the first to toast to *Survivor*’s return to UK linear television on behalf of our digital community – and raise a glass to another 25 years. **TBI**

Shaun Keeble is VP of digital at Banijay Rights, where he oversees the distributor’s digital self-publishing commercial activities



GREAT KIDS' ENTER-TAINMENT LEAVES ROOM TO CHANGE THE POINT OF VIEW.

**MIPCOM
BOOTH R7.K17**

distribution@studio100media.com
www.studio100group.com

STUDIO100

“THAT GIRL”



KANAL D
INTERNATIONAL