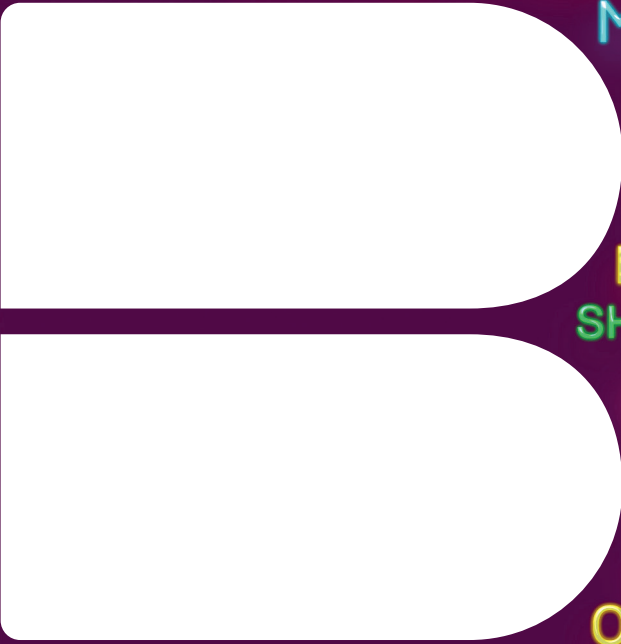


# TBI Television Business International

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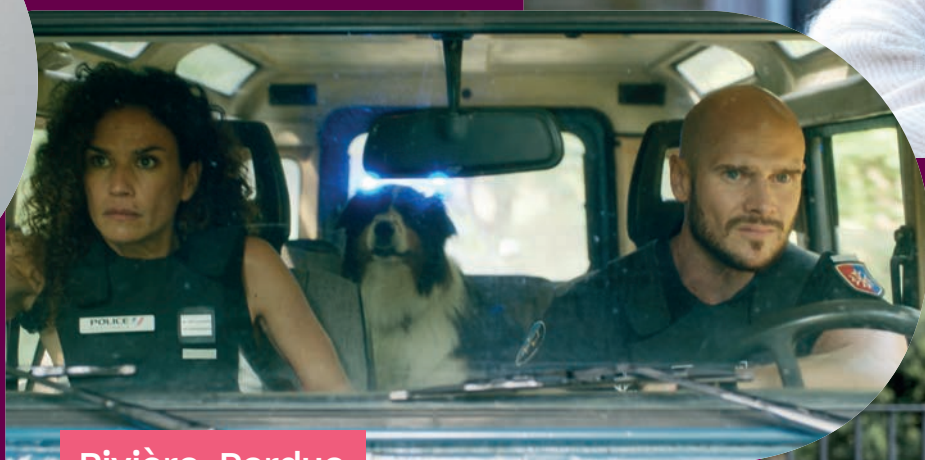
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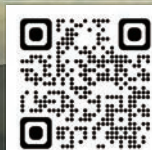
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## Editor's note Richard Middleton Cooking up trouble

I was talking to a restaurateur friend recently. He runs a very decent, independent, mid-range spot in the UK, the sort of place you might go on a Friday night when there's nothing in the fridge (or the local shop) where you don't have to worry about a) the behaviour of your children or b) the bill. But he is worried.

Within five years, he told me, his industry will be in a sticky position. Firstly, costs are rising across the board. Secondly, many restaurants have large debts from the pandemic that are rising with interest rates. Thirdly, people aren't eating out as much. And lastly, partly because of one, two and three, the pay and conditions are turning off new talent.

It all resonated. As did his prophecy.

By 2028, roughly (he's a restaurateur, not a soothsayer), there will no longer be a spectrum of places to eat and enjoy: there will be a few, high-end places charging top dollar; and there will be 'dark kitchens' producing relatively less tasty but low-cost meals in takeaway cartons, delivered via scooter for you to eat at home in your own bubble. Nothing wrong with that, he added, but something once valued will be gone.

As the industry descends on Cannes for MIPCOM, similar pressures are being felt on our industry no matter where you've travelled from. Ad dollars are going digital; public broadcasters are having to fight for their funding futures; global streamer consolidation is almost a given as US studios slash and burn; pay-TV is aggregating.

Against this backdrop, thank goodness for France: the bastion of gourmet cuisine has also created a TV ecosystem in which it continues to serve up tasty morsels for our viewing pleasure (page 62) but it's not the only bright spark – just check out this edition's smorgasbord of Hot Picks across every genre.

There is also an understanding that what's on TV matters to society, hence the launch of the European Writers Club (page 68), questions around the lack of female-focused sports docs (see page 96) and the potential and threats of AI (page 46).

As ever with TBI, we take you around the world with a trip across Asia to explore the diverse region's factual output (page 92); into India following the \$10bn merger between Zee and Sony (page 56); and don't miss this year's Distributor Survey (page 34).

And make sure you take a moment to hide from the masses on the Croisette to check out *Succession* creator Jesse Armstrong (page 28) discussing his craft and his own recipe for success.

Last but by no means least, thanks to the TBI team and our masterful art director Matthew Humberstone for putting this edition together. We hope you enjoy it.

Have a great market,

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## Diversity Deborah Williams

### More than a pipeline

**“Viewing some of the content from Asia has challenged my somewhat narrow understanding of cultural norms, as well as providing encouragement on the portrayal of disabled people”**

**A**s the global industry gathers at MIPCOM, I'd like to think that the writers and actors strikes have helped remind us that we are people working with other people, not just purveyors of a 'pipeline of content'.

AI is in many ways a known and familiar entity, but in other ways it's unknown and fear-inducing. The evidence so far seems to suggest that if you are at the bottom end of decision making and the top end creatively, you should be watchful.

It's even more critical when you add the impact of AI on diversity into the conversation, which very few people are doing. I'm currently working on a research proposal for ethics and AI in the screen industries. It risks opening some old wounds, and perhaps creating new ones, but our intention is how we can work together to embrace progress.

Over the recent months, I've been lucky as a juror on TBI's Content Innovation Awards to have watched some fantastic examples of real people's work, spanning different genres, languages and continents. It's given me a real appreciation of what is being commissioned globally, and on sale, at MIPCOM.

The way that diversity is presented across these shows surprised me. Viewing some of the content from Asia has challenged my somewhat narrow understanding of cultural norms and history, as well as providing encouragement on the portrayal of disabled people.

South Korea, Japan and China are really starting to explore the experiences of disabled people. There can be a slight tendency to 'play' the impairment and it's also unclear whether the actors are disabled. I should have been annoyed by this, but more often than not, I wanted to watch to the end to see what the resolution was – frustrating when you only get one episode and a trailer to watch!

I was impressed with both narrative and representation. Stories about women with learning disabilities using their sexual characteristics to be liked

by men; young women with aesthetically pleasing lives giving it all up to be with an old school love who is now blind. Or the very pedestrian cop pairing of a blind person and a begrudging, young up-and-coming US cop figuring how to cope with fundamentally different ways of working. Think *Rush Hour* with Chinese leads.

From Europe, a comedy series with disabled people leading it that has dark undertones about manipulation and bullying within the caring profession, was very true to experiences I've personally witnessed and was so real, it hurt.

It's in the UK and North America where innovation is less obvious. You're more likely to see disabled people playing disabled characters, but most of the content is firmly in unscripted. So you end up with personal stories which tend to be one-dimensional and don't really tell us anything we don't already know.

*Ralph And Katie* stood out. It wasn't my kind of show, and the theme wasn't new. But the innovation lay beneath its skin – its production processes, access coordination and embedding inclusion across the show – which are key to moving the diversity dial.

To me, narratives about race were disappointing and pedestrian. It was almost as if the attitude was 'we've done that, now what's next?' Where were the black love and hate stories? Where were the regular shows we need for the new generation of creatives to develop and grow their craft? Where are the next *Save Me, I May Destroy You* and *Sorry, I Didn't Know*?

In short, we need to continue to nourish the creativity and talent of real people in our industry and those clamouring to join if we're going to create the best possible content, rather than worrying about whether AI can do it better.

This will be my first time back in Cannes since Covid and I'm really looking forward to meeting creative colleagues from around the world and getting a sneak peek at new shows on the market, which I hope reflect more diverse and inclusive commissioning. **TBI**

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





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# About Town

## Degrees of separation

Cambridge was the destination for the UK industry in late September, as bosses of the BBC, ITV, Channel 4, Paramount and Warner Bros. Discovery UK joined James Corden, Emma Thompson and Piers Morgan for the RTS Convention.

Liberty Global topper Mike Fries, Creative Artists Agency's Bryan Lourd and Sky's Dana Strong were also in town - along with a bevy of others wanting to mingle with the aforementioned - as they descended on the university city to discuss the 'Too Much To Watch' theme bestowed by chair and Channel 4 boss, Alex Mahon.

There was not, however, too much hard news coming out of proceedings but plenty of discourse was espoused, with Mahon kicking off the event with some forthright words about the industry's tolerance for "terrible behaviour" against women in the wake of allegations against UK presenter Russell Brand.

Lourd urged US studio bosses to "bother to understand" creative; ITV's CEO Carolyn McCall said "of course" her company would be looking



again at buying All3Media; and BBC chief Tim Davie chatted about the "fight" of his life to keep the UK pubcaster relevant.

Elsewhere, Morgan threw out barbs and smiles, Corden reflected and comedian Katherine Ryan took to a chair barefoot during dinner to provide laughs and giggles. But the real reason everyone takes the hour-long train from London is to network and gossip, with Roku's late-night drinks providing plenty of opportunity for both. All that remained was for execs to retire for the night, reliving their youth by ditching their swanky apartments for university digs.

## Many happy returns

La Rochelle's Festival de la Fiction celebrated its 25th edition with a veritable blooming of French drama under the late summer sun, with those not in attendance bemoaning the numerous pics on attendee's social media feeds. Broadcasters, producers, streamers and creatives all made their way to the country's southwest coast, with one key takeaway being simply the range of product on offer. Prime Video's *Drone Games* and 13ème Rue's *Follow* were among the event's award winners.



## Toulouse time



It was another jam-packed few days for the European animation industry at Cartoon Forum 2023, with sessions, meetings, pitches – and a drink or two – at the annual event in Toulouse, France. More than 1,050 participants, representing 505 companies and 37 countries, were present, with *Baby's First Crime Spree*, from Ireland's Cardel Entertainment and the UK's Snafu Pictures; and *Littlest Robot*, from Germany's Toon2Tango and V House Animation, in North Macedonia, both receiving healthy interest from buyers.

## Swings & Roundabouts

**13%** The WGA's "exceptional" deal with the AMPTP secured minimum 5% pay increases for 2023, rising 4% and 3.5% in 2024 and 2025. Across three years, it's a compound bump of almost 13%

**A\$175m** A u-turn on Swings & Roundabouts! Australia's New South Wales government backtracked on plans to slash state funding programs, including the Made in NSW Fund that has provided A\$175m (\$115m) over five years

**10** Disney and America's second biggest pay-TV cable operator, Charter Communications, kept viewers in the dark for 10 days before striking a new, but reduced, carriage deal

**30** A day after Roku said it would be reviewing its content strategy, more than 30 shows, including *Dummy* and Joe Jonas's travelogue *Cup Of Joe*, were pulled from The Roku Channel in a cost-cutting move





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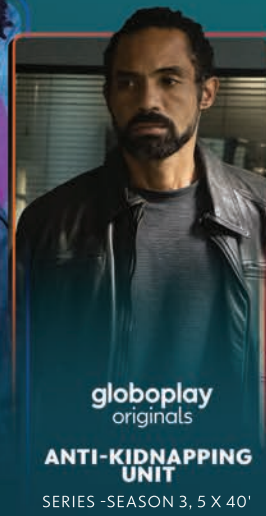
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SERIES - 10 X 30'



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## Formats Siobhan Crawford

# Remember your manners

**“If you move my meeting, I know my priority level – and we all have long memories”**

**T**he last time we ‘spoke’ it seems like the message resonated. I heard ‘shiiiiit’ echoed across all corners of the market – and we will be returning to that point, because the perspectives of so many people in response are fascinating and so worthy of sharing.

But for now, MIPCOM is upon us.

Some of us feel it more than others, or our energy levels do at least.

I thought about our now traditional ‘hot list’, presenting shows from independent distributors who work like mules pre-market to have something to show and forecast against for the next few quarters, but I decided to let you do your own work this time.

Instead, Cannes: what rules should we live by when heading down south? I have asked some of my favourite people in the industry what they advise as the essential etiquette and expectations in Formatland, and boy do we love the answers.

For the newbies and the old-timers, this is Cannes Etiquette – Lesson 1: Don’t be a dick.

### **Living la vida loca**

Some of this requires no explanation, but we all get stung somewhere:

- Set your invites to the right time zone
- Remember press releases pre-MIP are noise, not substance
- Bring earphones to listen to promos
- If you are the most senior, pay for the juniors (and/or freelancers) – we all spend a lot at the bar, let’s pay it forward!
- Be kind to distributors who have likely pitched the same show 40 times (must be a person with a light schedule)
- Make reservations or forget the delights of Da Laura and expect grumpy French at Goéland
- Sunblock is no joke
- Don’t tell people they look tired, it is already known
- If you don’t leave after 25 minutes, you will still be late – you can wear running shoes all you like
- Paper business cards – QR codes? What world are you living in? Paper, please

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

### **The art of a quick ‘No’**

When in Cannes, as in life (as a distributor and producer) we get rejected... a lot. So when you can, be cruel to be kind and rip off that band-aid:

- The art of a quick ‘no’ – it will save us all on our follow-up reports
- Shout ‘conflict’ early when watching trailers – IP theft is rife, and trust, once broken, is hard to repair
- Don’t claim to have something in internal development in every genre – I get it, catalogues are large. The current climate is for collaboration and a percent of something is better than 100% of nothing
- Buy, don’t borrow – I will be saying this my whole life. Do you want to keep your independent distributors and producers? Or do you want to end up with only groups?
- Don’t get too excited, you won’t sell everything – ‘S’ made me laugh when he said this, the market gives false hope. True ‘dat

### **Me, myself & everyone else**

This is a relationship-based industry. I say this on repeat. This may seem basic, but it seems to slip by a few people. So here are four key rules:

1. Don’t be a dick – blanket rule – and the dicks know who they are, but they say they are ‘confident’. “Same same but different,” is the phrase that comes to mind
2. If you move my meeting, I know my priority level – and we all have long memories. So lesson number four below applies.
3. Don’t be a no-show – it is the height of arrogance. You will be called a ‘rule 1’ here if you do this
4. Be real – Dutch direct, Nordic honesty. I hear it all over, the genuine you is the one we want. Forget your company hat and your sales spiel and talk to us!

So this is the wisdom from me and the gang, hard and fast rules to work by with one main rule. At a time when the industry is hurting, be the Jimmy (or insert name of best person you know here) and emulate them. **TBI**



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## Scripted Anthony Kimble

### Too little, too late?

**The US writers' strike is finally over, but are we heading for a new era or an existential moment, wonders Anthony Kimble, CEO of Arrested Industries**

After months of uncertainty and tension, the curtains have finally risen on a new chapter for Hollywood after the writers' strike came to an end. The City of Angels is abuzz with both relief and anticipation, as (almost) everyone ponders over getting back to work. But what will the future hold?

At a post-deal event at the Hollywood Palladium, the Writers Guild of America (WGA) celebrated its leadership and solidarity, and outlined the deal points to its members. It was described by one friend who attended as an uplifting “rock concert”, giving everyone reasons to rejoice after months of hardship.

Some of the productions that were put on hold can now resume. Suspension of overall deals has been halted and the giants like Berlanti, Rhimes and Murphy are already kickstarting their creative engines to get productions up and running. In addition, quick turnaround daily shows with the likes of Bill Maher and John Oliver have swiftly returned to their slots.

For myself, I was elated when the first emails dropped from showrunners and creative partners that I have not heard from in months. And two agencies called to ask about attaching talent to early-stage development projects that were shelved when the strike began. Most bizarrely though, you'd expect Hollywood to have become noisier this week. However, after driving down Overland Avenue, past an eerily quiet, picket-free Sony lot, it hit me just how loud some of the protests were.

But not everyone is bouncing back. The strike has taken a toll on many industry professionals. Sadly, some have already left the business as they have not been able to financially weather the storm. It seems to be the younger, more diverse creatives that flock to LA from their conservative hometowns that have been the hardest hit, and it is heart-breaking to think that we may have lost the next Billy Porter or Janet Mock as a result.

There's a real sense of indignation that the studio heads did not get serious about negotiations and join the conversation until it was too late for many. Everyone believes the strike could have been resolved months ago if only the C-Suite had taken it more seriously. The strike has exposed corporate arrogance, shameful attitudes and ridiculous salaries. A lot of respect has been lost for these once untouchable masters of the universe.

The ‘Golden Age of TV’ had already started to tarnish before writers put down their pens. So, as the market opens, it is with a certain sense of trepidation that we all wait to see what the new era will look like. Accelerated contraction, stripped-back budgets, fewer overall deals, and possibly even more shows being axed are all on the cards... leading to the inevitable – and maybe essential – reset that many have predicted, me included.

We just can't return to 2022's peak drama commissioning in the US, with 599 shows. It's not just a matter of everyone now believing ‘less is more’ – it's plain and simple; the metrics and models don't work. We are going to have to see some further dramatic changes, particularly at the streamers.

I'm guessing buyer caution will remain too. The networks and streamers may have used the downtime to carefully evaluate their slates, but I bet the majority will be looking for the safer, more commercial properties as they step back into the fray. Now is not the time for major risk-taking. So maybe the new era will just look like a slimmed down version of the old?

I've lamented before about the lack of creatively excellent shows being commissioned in the last year in favour of safe shows and dull franchise reboots, so was truly heartened to see Casey Bloys, chairman of HBO, saying that at least the strike won't change the types of programming HBO is planning to order. However, he did call this an “existential” moment for the industry and an “uncertain and scary time”.

But I rather like the sound of this... an existential moment could lead to a real deep dive into the nature of what Hollywood should be going forward and the choices the industry makes to be better, stronger and ensure a meaningful future for all involved. As opposed to a reset, which could just mean going back to a beginning.

While it's difficult to see where it all will land, especially with the actors still striking, wouldn't it be great if the last four months generated a true seismic shift in Hollywood... and it became fairer, more diverse and inclusive, more open and more international? I'm genuinely delighted that writers are now adequately protected and we can get back to work, but I do wonder if, a year or two down the line, we'll really notice any difference. **TBI**

Anthony Kimble is co-CEO and founder of Arrested Industries, overseeing its scripted operations from LA



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## Branded content Luci Sanan

### Investment & returns

**TBI's resident branded content expert Luci Sanan reveals what to expect as companies move deeper into funding content**

**A**s the content industry gears up for another gathering at MIPCOM, more execs will be talking about brand entertainment in Cannes. Here are my predictions for the months ahead for editorially-led, audience-focused video content that is directly financed or partly funded by a brand.

#### More brands becoming studios

More big global brands will set up content studios and behave more like traditional studios in commissioning and producing premium entertainment. We have seen examples recently including P&G Studios, AB InBev (with Sugar 23) and Crayola.

Some brands are tackling the role of both studio and publisher, with Expedia's content platform aiming to be somewhat of a Netflix for travel content. We will see more from big brands doing the same, in turn by passing traditional commissioning and linear routes. This will mean more opportunity for creatives to work directly with brands with good budgets and big ambitions.

#### Meaningful engagement

As broadcasters and streamers feel the bottom of their pockets, the penny is finally dropping that one of the clearest ways to keep up with the creation of great content without diminishing editorial integrity is to engage directly with brands to finance content. It's quite a complicated task, but over the next few months we will see commercial broadcasters and streamers staffing up with people who have experience in working with brands and producing advertiser-funded programmes. This is already starting to happen.

We will also see commercial broadcasters and ad-supported streamers joining the dots more between content and commerce. For example, if you watch the recent Tripadvisor-partnered series *The Wanderer*, available on Amazon Prime Video, you will be served ads because you've watched that show. Addressable advertising and direct links to commerce will grow.

#### Social growth

We will see more content studios producing for social. Ogilvy's Jai Kotecha recently commented: "For perhaps the first time, there are clear and reported direct correlations between content and ROI". Social content and creators have exploded (again) and have refreshed this space with fresh original content. Originals on YouTube from brands like Footasylum and MAN have shown how digital and social formatted content can reach a massive audience with relatively small investment. MrBeast's *7 Days Stranded At Sea* had over 46 million views within 48 hours of uploading it in August. This isn't going to go away, and ad money isn't suddenly going to start pouring back into linear.

#### Socially responsible docs will shine

As the world continues to battle one existential crisis after another, brands are compelled to spend bucks on causes that matter and align with their values. We will see more CSR budget and topical-themed feature docs and festival releases. It won't be long until some major mainstream industry awards are won by brand studios. Key releases can be expected at Tribeca and at Sundance, and SXSW amongst others. Check out US feature doc *Canary* from Oscilloscope Laboratories, Boardwalk Pictures & REI's Co-op Studios.

#### A metric future

Crucially, the next few months in brand entertainment will largely be about measurement. How can media owners look to leverage the commercial opportunity of brand funding without transparent data? Streamers, in particular, need to share more data. We need to see more robust metrics that demonstrate ROI and align with marketing effectiveness. Brands need to know who their content will reach, and how they feel thereafter, and how their behaviour changes because of viewing the content. AI tools will quickly advance how brand awareness and engagement is measured. **TBI**

Luci Sanan runs independent consultancy firm 53 Degrees North Media, set up to provide strategic and commercial consultancy to producers, media owners and brands. She has previously worked for The Story Lab, DRG, Banijay International and Small World IFT



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## Tech & Analysis Tim Westcott

# Forecasting Hollywood's streaming spend

**“After a mostly impressive start, streaming has proved a challenging business for the US studios”**

**H**ollywood studios Disney, Warner Bros. Discovery (WBD), NBCUniversal (NBCU) and Paramount all made the decision to fight back against Netflix in the global streaming marketplace, launching their own direct-to-consumer services. Nearly five years on, how is the studio fightback going?

After a mostly impressive start (Disney+ massively surpassing expectations after its launch in 2019, for one), streaming has proved a challenging business for the studios. As of the second quarter of this year, all of the studios were still losing money in their direct-to-consumer segments, while Netflix has continued to amass profits, taking pricing changes and a crackdown on account sharing in its stride.

Shareholder unrest brought Bob Iger back to the helm of Disney, setting a target of \$5.5bn in cost savings and trimming 7,000 jobs from the payroll. WBD, struggling to bring its debt under control, has also cut costs. On top of this, the studios have been locked into a strike by both screenwriters and actors, many of whose demands are directly opposed to the goal of more profitable streaming.

The strike has affected Netflix, which is on the same side of the negotiating table as the studios, as well, stalling productions including *Big Mouth* and *Stranger Things*. For all players, the strikes are likely to mean that productions due to start in 2023 will be pushed into next year. This is not all bad news for the studios: WBD CEO David Zaslav was reported saying that the strikes had saved the company \$100m.

Despite the high profile of streaming, the US studios are multi-faceted businesses, and their direct-to-consumer divisions are only part of the revenue picture. NBCU was boosted in the second quarter by *The Super Mario Bros. Movie*, while WBD's Q3 results will bask in the halo effect of *Barbie*. Disney's theme parks division has had a strong year, too.

In terms of programming expenditure, direct-to-consumer will account for between 16% to 40% of the money spent by the studios in the US this year, according to Omdia's Digital Content & Channels Intelligence. Overall, we estimate Disney will invest \$25.3bn on TV and online programming in 2023,

with Disney+ accounting for just over \$4bn of the total. WBD is expected to spend \$4.6bn on direct-to-consumer programming (which technically includes the linear HBO channels as well as Max), within \$11.6bn overall.

NBCU is somewhere in between, with 28% of its overall spend by Peacock, while Paramount+ accounts for 30% of its parent company's spend.

Again, looking at overall investment, Omdia is expecting to see a slowdown in expenditure by the big US groups in the full year 2023. Looking at investment in the US only, the Walt Disney Company will increase spending by 2.1% this year, an almost identical year-on-year increase to 2022 versus 2021. Investment on Disney+ will, however, increase by just under 26%.

NBCU will, we expect, invest \$11.5bn on US content in 2023, up 7% on the year before, with investment in Peacock up 9%. WBD will slightly reduce overall spending to \$11.6bn, and will cut direct-to-consumer spending by nearly 3%, we expect. Paramount will cut content investment by 6.5% to \$8.2bn, although direct-to-consumer spending will increase 4% to \$2.5bn.

If we look at spending on online content only, the studios are some way behind Netflix (important to note that we are looking here at P&L spend, not cash spend). Omdia estimates that Netflix will spend \$8.7bn on US content in 2023. This is only marginally more than its total 2022 spend, and is impacted by the writers' strike and a continuing increase in investment outside the US (especially key territories like South Korea and the UK). Amazon is in second place with \$5.6bn (note that, unlike Netflix, this includes some live sport). Apple TV+ has moved ahead of Paramount with a forecast \$3bn investment on content (again, now including sport).

Any hopes that Netflix might be diminished by the US studios' D2C moves have certainly not been borne out. The streaming service appears stronger than ever and is still pouring money into funding new content. As we have said before, Netflix is obliged to do this because it does not have a massive library of film and TV to draw from, unlike the studios (while Amazon has swallowed up MGM). **TBI**

Tim Westcott is senior principal analyst for digital content & channels at Omdia, which, like TBI, is part of Informa



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## Legal Julian Wilkins

# AI is getting (even more) complicated

**TBI's legal eye Julian Wilkins unravels the inconsistencies around potential regulation of AI content**

**A**lthough artificial intelligence (AI) has existed for years, its existential accessibility in the last year is leading to politicians and regulators assessing its benefits and threats to humankind. Whether it is the UN General Assembly, or the recent behind closed doors US Congress meeting, or the UK's planned Summit in November, AI is centre stage.

Meanwhile, the US writers' strike seems to have reached resolution – including in relation to AI. Whilst there are regular proclamations for AI regulation that encourages innovation but protects intellectual property rights, some are taking pragmatic initiatives, with Google and Universal Music negotiating to license the voices and melodies of artists for AI-generated songs.

Elsewhere, decisions are awaited in Getty's US and UK court copyright actions against AI art generator Stable Diffusion – Getty contends that 'training AI' breaches their archive copyright. A US federal court ruling in August deemed AI-generated artwork cannot be copyrighted on the grounds that copyright law only extends to human beings.

The European Union's AI Act will be law before the end of 2023 and will be the world's first significant legislation on Artificial Intelligence. The Act includes an obligation to disclose AI-generated content. AI models must be designed to prevent generating illegal content, whilst there will also be a requirement for published summaries of copyrighted data used for training.

The UK's Copyright, Designs and Patents Act 1998 includes a copyright exception allowing text and data mining (TDM) of copyrighted works for non-commercial purposes, provided that the user has lawful access to the work such as under licence. The UK government was considering extending this exception to AI development but after criticism they halted this approach.

The UK government's white paper suggests each industry sector develops its rules using non-statutory guidelines to create consistency but taking account of their special needs.

The UK's AI code of practice is likely to be launched soon. The proposed code strives to balance AI innovation with protecting copyright owners. The

voluntary code is understood to allow creatives and AI developers to co-exist; what this means in practice remains to be seen. Legislative reform could be considered if the code is not agreed or adopted.

The Code's working group established by the UK's Intellectual Property Office (IPO) includes technology, creative and research sector representatives. The IPO has said the code will aim to "make licences for data mining more available," helping "to overcome barriers that AI firms and users currently face, and ensure there are protections for rights holders."

One can see, however, the tensions building between the creative industries and the innovation sector.

The UK's Culture, Media and Sport Committee published a report calling for improved protections for creatives to prevent misuse of their likeness and performances by AI. The report calls for an expedited accession to the World Intellectual Property Organisation (WIPO)'s Beijing Treaty on Audiovisual Performances. Another recent report published by the Culture, Media and Sport Committee said the government "must work to regain the trust of the creative industries following its abortive attempt to introduce a broad text and data mining exemption."

In the US, potential conflicts and inconsistencies between some State laws and federal laws may arise. The Californian legislature urged the US government to impose an immediate moratorium on the training of AI systems more powerful than GPT-4 for at least six months for time to develop AI governance systems.

The US Congress has introduced a Bill to establish the National AI Commission. This commission intends to provide three reports over 24 months. This timeline appears slow compared to the EU's AI Act. Whether this ends as a legal tortoise and hare fable remains to be seen.

Either way, US state legislation increases the risks of a mix of different, and potentially incompatible, AI regulations.

For the creative industries, this lack of consistency amongst different legal jurisdictions will create a very uncertain market, especially where clarity as to protection against AI generated 'creative work' is sought. **TBI**

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



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# Cooking up a classic



*Succession* creator Jesse Armstrong reflects on his HBO epic with Richard Middleton, dissecting his creative process and explaining why he wouldn't change a thing about the show or its ending

**J**esse Armstrong is the scripted world's hottest property right now. And he's happy doing absolutely nothing about it.

It is understandable: the *Succession* creator tells TBI he had "constant anxiety of screwing the show up" and "infecting" the rest of the series as it reached its climax earlier this year, which, given its name, would have been somewhat detrimental to its legacy.

Instead, Armstrong completed one of the toughest tasks in scripted TV - he landed a critically acclaimed show and managed to avoid upsetting too many people in the process.

*Succession* originally began life as a docudrama more closely based on Rupert Murdoch

## And breathe...

*Succession* wrapped its fourth and final season in May on HBO following a stellar run that tracked the life of media mogul Logan Roy and his attempts to find a worthy successor to his media empire, Waystar RoyCo.

Talking to Armstrong, it becomes clear just how all-consuming the show was - only now is he able to reflect on what has been achieved. It is also clear that he is a thinker, with pauses to collect his thoughts before delivering succinct nuggets that provide insights into his writing process but also the scripted industry as a whole.





**“You take a family dynamic, a bit of mythology, some history and suddenly you have a really rich brew that’s mostly stolen – and then, hopefully, you’re the crucible in which it all gets boiled up together”**

of everything and nothing – they are really different shows, I wrote *Peep Show* with my writing partner, Sam Bain, so it was very much a collaboration.

“But sitcoms are in my bones and I learned storytelling on it, we paid quite a lot of attention to that even though it was a half-hour sitcom. That’s where I learned how to write really and we did nine seasons of it.

“And, you know, most of what I came to rely on in *Succession* was storytelling that I’d learned with Sam on *Peep Show*. There’s a way of looking at *Succession* as a comedy or even a sitcom – perhaps that doesn’t tell the whole story, but it’s not an unprofitable way of thinking about it.”



The story of how *Succession* came to being is now well-known, originating as a docudrama in which a fictional character based on real-life mogul Rupert Murdoch would deliver straight-to-camera insights into his business secrets. That was more than 15 years ago, with the intervening years allowing the idea to evolve into a fictional scripted series that mirrored elements of Murdoch and other media bigwigs’ lives.

But it was life before that on shows such as Channel 4’s slow burning comedy *Peep Show* and films including Chris Morris’s *Four Lions* that provided Armstrong with his skills to deliver *Succession*.

“From *Peep Show* into *Succession*, I got sort



## Creative process

While *Succession* was not based on Murdoch directly, Armstrong used biographies on the Fox founder – as well as books on Sumner Redstone, Robert Maxwell, Conrad Black and Tiny Roland – to research copiously and to create the rich worlds in which the Roys live.

Yet despite the myriad links between the TV industry and those moguls, Armstrong says he didn't talk to "many people face to face" and being removed from his subject matter was important.

"I found it quite useful to be British writing about America and having that distance. When I occasionally have met powerful people in the media or elsewhere, you get such a strong sense of them and their personality that it can almost be distorting in that you feel that you've had insights that aren't there.

"There's just a feeling from meeting this influential person like you're on the inside and it does nothing necessarily for what you write. Maybe you can use that feeling, but people don't need to know who, personally, these people are, and you don't need to chase down that lunch with the person on the inside of it.

"Read the books, read the articles, it's all in there – most of the best stories are in those secondary sources."

And, Armstrong admits, he encourages writers to steal – "you know, not to steal other people's scripts, but to steal from life. Those biographies are rich in specific detail and they're rich in character dynamics. And you then will find that your material metamorphosises in your hands into something completely new.

"You take a story from there and a story from their family dynamic that you know, from your own relationship with family, then a bit of mythology, a bit of history and suddenly you have a really rich brew that's mostly stolen. And then, hopefully, you're the crucible in which it all gets boiled up together."

## Getting the consistency

The industry is in many ways unrecognisable from the one that saw *Succession* commissioned to pilot in 2016. Two things are current however: HBO's Casey Bloys and Donald Trump.

Bloys, who has since risen to become chairman & CEO at HBO and Max, "trusted" in Armstrong, partly because of his work on fellow HBO show *Veep*, so while "it wasn't a big swing, it was still a swing".

Trump, meanwhile, was elected on the day that the read-through for the pilot took place.

"We had this auspicious start, feeling like we were right in the middle of the culture. And up until that point, the only other writer who had been involved with it was my colleague, Simon Blackwell."

After that, Armstrong brought a writers room together and the ship sailed off, helmed by a captain who says he "made it up as he went along."

"You know, it's extraordinary when I speak to fellow showrunners, because there is no one way of doing it. There's no manual, really the job can stretch to whatever you want it to be in America, you're given a lot of latitude."

Yet Armstrong's self-deprecation seems to hide a man who knew exactly what he wanted but was willing to give his writing team the freedom to create this complex world.

"I was willing to let people come in, even if they were only going to be there a couple of days each week," he says. Some joined via Zoom, with five or six writers working some days and 10 or 11 on others.



*Peep Show* is "where I learned how to write", says Armstrong of the Channel 4 comedy

"I did relatively short days, from maybe 10am until 3pm or something like that, partly because there's a limit to how long you can be really concentrated and focused.

"And also that gave me time. You have someone in the room taking notes, keeping a record of what's said, so it would give me time at the end of the day to go to my office and look over what we've done the previous day."

Armstrong says his process remained fairly consistent across the show's four-season run, with the first four weeks or so being "really very open".

"We don't need to worry about what's in an episode. You could pitch a really silly story for Greg or you could pitch a very heart-rending piece of backstory that we wouldn't know if it would make it into the show.

"But we would talk about it and anything's allowed in that time. A lot of character talk, a lot of backstory talk and a lot of 'general shape' talk. By the end of those four weeks, you would hope to have the season arc sketched out and then you can go through and spend a week on each individual episode, breaking them down."





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Scripts would tend to go through 40 drafts and Armstrong says there were “almost no notes” from HBO, until the end of the process.

“I would have already pitched them the arc of the season though and I do that in some detail. I remember Jane Tranter, who was an executive producer on the show, came in during the very first season that we did, before I pitched the season [to execs].



“I did it in a slightly British, maybe ramshackle kind of way, saying ‘maybe this will happen, maybe that’s going to happen here,’” Armstrong says. “She took me aside and said look, you know, I think this is working, but work on that pitch like this is the first time they’re going to hear the season.

“If they have a good reaction, the next six months of your life are going to be a lot easier.” Such an approach, he adds, is key. “Just remember that you’re putting capital in the bank of trust.”

### Day-to-day & next moves

On set, Armstrong says he would often interact directly with actors if they wanted to, assuming the episode’s director was comfortable with that. “And obviously, outside of the production and the director sphere, I’m talking to the actors a lot.”

But what about the varying approaches to acting, particularly those taken by method actor Jeremy Strong (who plays Kendall Roy) and Brian Cox, who plays his father?

“There has been a little bit of crackle about that but it wasn’t a big part of daily life,” he says.

“They prepare in different ways but what it came down to was a preference for a little bit more rehearsal versus a little bit less. Honestly, often, they were in the same space about how much preparation they wanted

Armstrong says that working on *Succession* was a state of “constant anxiety”

to do for a specific scene. So that wasn’t a big challenge in my showrunning life.”

Fast-forward to today and the industry in a state of increasing flux with Bloys and other US studio execs tightening spending, would *Succession* even get made?

“I’m not a good industry analyst type so I don’t know, but the enthusiasm is there for quality shows. *Succession* probably had an outsized reaction because it was set in the media world. In the context of the US population, it had a smaller number of viewers on nights it went out, but on catch up and so on you’re looking at more like 8-10 million people watching it.

“*Peep Show* also had small numbers at the time but now they would be considered very good numbers for a UK sitcom. And I do think that *Succession* – and this was not a consideration at all for us – will continue to make money for people because it is a good show. It is solid, the plots for each episode were thought out and people can continue to watch it.

“And people will continue to think about that. If you make something really solid, its life can be long.”

The next move for Armstrong remains to be seen; there are ideas percolating, but like most writers in the US, he has been striking until September.

“I haven’t had the time or, to be honest, the inclination to chat about the show too much [until recently]. But I feel happier discussing it now because it is in the rear view mirror. I’m not picking apart the body of an athlete while it’s still trying to run a race.”

So are the characters that populated *Succession* still in his head when he wakes up each morning?

“Very occasionally, sometimes I see a news story and I think that’s a great bit of stuff that we could have used as the kernel of a story. But that is massively outweighed by the relief that I don’t have to break that story, to think about how it works and keep on at it for months before realising that it won’t fit into an episode and discard it.”

Perhaps, given this, it’s no surprise that he wants to leave his Logan Roy-led production alone.

“No, [I wouldn’t change anything] and that’s not in an arrogant way, but I was so worried. The state of showrunning is constant anxiety of screwing it up, that what you’ve done so far is OK but the next episode might fail and won’t be coherent or true, or real. It will in some way retrospectively infect everything you’ve done before and make it seem shit.

“The anxiety was constant through every season and there was a fear that it would be the next hurdle where we would fail, which is why there were so many drafts and attempts to make sure we got there, to make it good. That anxiety is particularly acute towards the end.

“I wouldn’t want to fuck with any of the component parts because the whole cake seemed to be edible. I don’t want to start throwing an extra egg in now.” **TBI**





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# TBI Distributor's Survey 2023

From FAST growth to pre-financing shows and navigating a consolidated market, the 2023 survey reflects the ability of the distribution industry to adapt to change. With more than 40 responses from sales companies around the world, join us as we discover this year's key trends

**I**t has been a year of transition for many in the TV industry. On the buyers' side, it has been tough: US studios have been coming to terms with the realities of streaming; commercial networks have been adapting to a squeezed advertising market; and public broadcasters have been ducking and diving as they try to stretch budgets. For those on the other side of the transaction, consolidation and risk aversion are very real concerns, but growth areas such as FAST and the ever-increasing importance of distributors in financing are seen as offering considerable potential in a business that has always had to adapt quickly.

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# Scripted: Crime pays

Crime and thrillers have driven the scripted sector over the past 12 months, with FAST replacing increasingly cost-conscious global streamers as the main growth area looking ahead

**I**t has been a tumultuous year for those in the scripted industry, with the once happy-go-lucky global streamers pulling the plug on spending and nixing numerous shows in the process.

In the US, the writers and actors strikes created simultaneous opportunities and challenges for distributors, as domestic networks and streamers look for offshore product to fill growing gaps.

Outside of the US, a similar trend is growing as buyers eschew delayed American dramas in favour of looking for more local fare or just shows that will be delivered on time.

This shift is not necessarily new of course, but the lack of competition from the US does mean more opportunity for distributors to get their shows onto screens. And with the strikes only just over, the lag effect for buyers is real.

“The strikes are causing delays in the US scripted content pipeline,” says Cineflix Rights CEO Tim



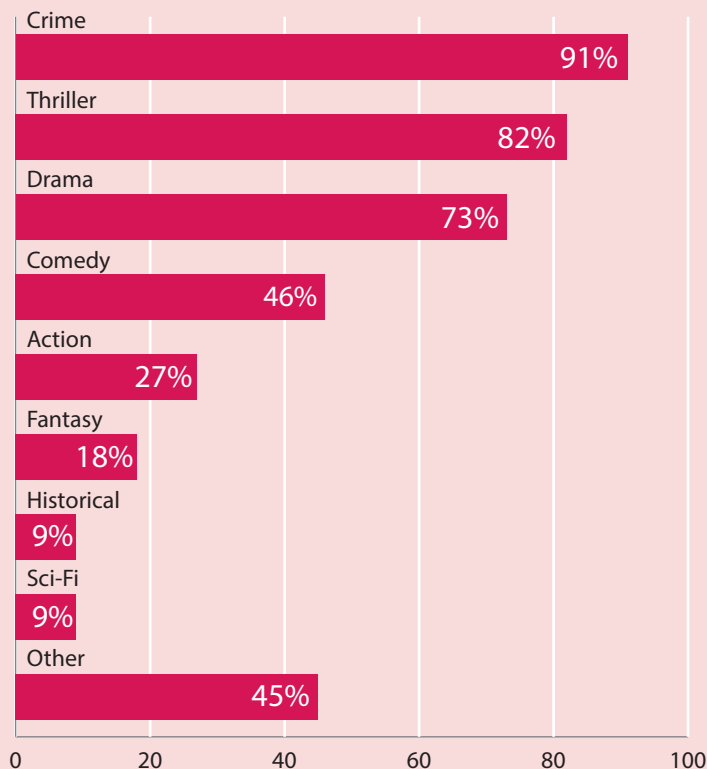
**are financing scripted series earlier than ever**

Mutimer, ahead of the WGA forging a new deal with the AMPTP in late September, but he points to his company’s “diversified” slate with shows from the UK, Australia and Canada, which are not impacted. “We are also anticipating that delays in the pipeline may mean buyers taking another look at existing oven ready IP,” Mutimer adds, with his comments echoed by others including Federation’s Guillaume Pommier and ZDF Studios Robert Franke.

Certainly, this year’s Survey suggests that distributors in the scripted sphere have enjoyed a buoyant 12 months, with every respondent claiming that annual revenue had increased and 63% reporting a rise of between 10-19%. A slowdown is evident when comparing to last year’s figures, however, when almost a third of respondents in 2022 reporting a revenue rise of 30% or more.

Further, revenues in 2023 did not necessarily translate into profits, reflecting the effect that the increasing costs of scripted is having on distributors. Just over 45% of companies saw profits remain the same year on year, while 29% claimed an increase of 0-9% and 25% reported a rise of 10-19%.

## What sorts of shows are selling best for you?



## Calling all crime

Fuelling growth this year has been the surging popularity of scripted crime programming: 91% of companies said this genre was among their best-sellers, with thrillers (82%) and relationship dramas (73%) also among the key series travelling internationally.

Comedy and action shows have also performed, named as best-sellers by 46% and 27% of respondents respectively, but romance, mystery and science fiction all underperformed with only 9% of respondents citing the latter as being a key genre.

And while almost all companies said their catalogues had got bigger since last year, the issue of market consolidation remains upper most in distributor’s thoughts. Just over 72% of respondents said increased M&A action had made life tougher, with the connected issue of accessing and controlling rights cited by 37% of respondents (who were allowed to answer more than one challenge to their business). Further, 72% are financing scripted series earlier than ever to secure their piece of content.



Other major challenges include risk aversion (34%) and falling ad revenues (26%), along with off-screen talent cost (26%).

### Navigating the SVOD stream

Among the most notable themes to have come away from the 2023 Survey is the wholesale shift in expecting growth from global streamers such as Netflix, Max and Paramount+. While 65% of respondents last year said they expected this group of buyers to grow in number in 2022/23, only 9% responded similarly this year, reflecting the ongoing belt-tightening that the industry has seen from players ranging from global operators such as Disney+ to regional operators including Viaplay.

While questions remain over just how profitable FAST will be outside of the US, it remains the sector expected to deliver the most growth in terms of buyers over 2023/24, with 91% of companies taking part in the Survey expecting this largely nascent sector for many parts of the world to expand further.

Yet while the US has embraced FAST and is monetising this emergent sector, much of the world remains several years behind in terms of uptake. This is reflected in this year's Survey, with 54% of respondents reporting that FAST accounts for around 10% of all revenue, with only 7% claiming a return of between 10-25% of annual revenues.

Away from FAST, there seems to be little expectation of any major shift in buyer numbers, although 24% of respondents are expecting acquisitions execs from regional streamers to also grow in number (respondents could pick more than one group). Less than 8% of respondents believe buyers from pay TV will increase in number.

### Expectations

There is optimism that the market will improve, however, with 82% expecting growth and countries including the US, the UK, Australia and Spain among those offering most demand, with regions such as Central and Eastern Europe and the Nordics also cited.

"We are currently facing lots of headwinds with the downturn in the advertising market, consolidation and cuts at the major streamers and studios, the writers' and actors' strikes and inflation impacting budgets. However, we are anticipating an upturn, if slow, when these issues start to resolve themselves," said Mutimer.

Staffing levels also look likely to remain largely steady, with 73% reporting no planned changes



**expect US studios to make more shows available than they did over the past 12 months**

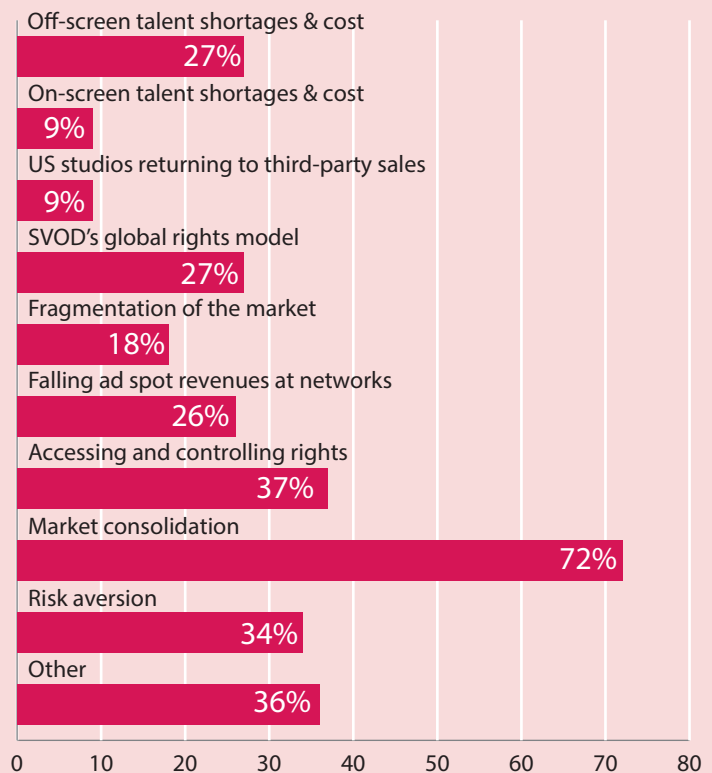
over the coming 12 months, up from 65% last year, although consolidation will likely see the overall number of roles available slimmed down.

The industry is also seemingly settling back into the more traditional cycle of events, with 74% saying they expect to attend the same number of events in 2024 as they did in the pre-pandemic world of 2019.

MIPCOM remains the industry flagship event, with more than 90% of distributors saying it is a must-attend, while Content London has also become a mainstay for the scripted industry and came second in the rankings. LA Screenings, NATPE Budapest and Asia TV Forum made up the top five places (respondents could pick more than one event).

While travel has largely recovered, online sales platforms are seeing their popularity wane, with 91% reporting no use. Artificial Intelligence, meanwhile, is also being experimented with but Banijay Rights chief Cathy Payne summed up most respondent's opinions by admitting that while it "provides enhancements and efficiencies in a whole range of processes, it's important to point out that individual human creativity, development and performance will always lie at the heart of our creative industry."

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





# Unscripted: Switching lanes

Unscripted programming has enjoyed surging demand from buyers in many parts of the world since the pandemic, but while belt-tightening from streamers and networks is hitting production, distribution pain seems yet to hit

**S**treamers looking to secure more bang for their buck have been turning to unscripted content for several years now and the insights from this year's Survey suggest distributors have – at least until now – been reaping the results.

Annual revenues were up for 83% of respondents, with 22% claiming an increase year on year of between 0-9% and a further 36% putting the rise at between 10-19%. Beyond that, almost a quarter of companies taking part in the Survey said revenues were up by more than 20%, with 18% of respondents claiming to have booked profit rises over the same period of more than 20%.

It was not all good news on the profit front, with 4% reporting a decline of more than 20% and 5% citing a decline of between 0-9%, but for the majority of the industry there was growth to be had.

While 27% of companies reported static profits, 29% saw rises of 0-9% while 18% saw an uptick of between 10-19%. Put together, the figures mean 65% of distributors in the unscripted sector saw profit rises, reflecting streaming growth and more recent avenues emerging that favour unscripted product, FAST in particular. But more of that later.

## Criminal thinking

True crime is again the stand-out genre for a sector that remains hooked on whodunnits, yet look more broadly and the interest being felt by distributors comes from myriad places.

While 68% of respondents said true crime was among their best-sellers (respondents could pick more than one genre), historical series (51%), reality shows (48%) and lifestyle programming (45%) were also in high demand.

Securing rights to those shows remains a major obstacle to growth, however. Just over 40% of respondents said the issue was among the greatest challenges they currently face but it was market consolidation that was the biggest worry, cited by 59% of respondents (who were able to pick more than one answer).

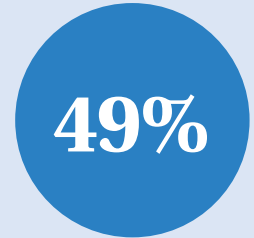
Accordingly, more than 55% of distributors said they were financing unscripted series at an earlier stage than ever before, while 41% of respondents

said that they are directly commissioning unscripted programming without a broadcaster or streamer attached.

Sarah Tong, director of sales at Hat Trick International, says that first-look deals are becoming increasingly prevalent, while Cineflix is among companies to have developed and pushed its 'pre-sales to greenlight' strategy.

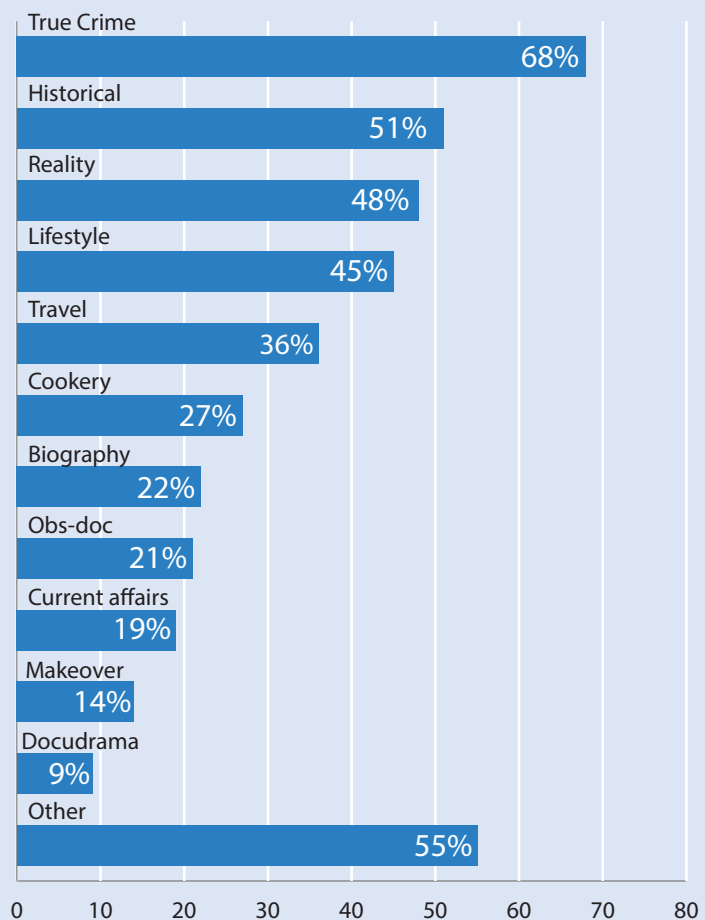
Falling ad spot revenue and risk aversion were also key concerns, again reflecting similar fears in scripted and more broadly across the industry, as streamers and broadcasters alike look to cut back on spending as consumer spending retreats.

Yet for distribution, such a squeeze can always



**49%**  
expect staffing levels to increase over the next 12 months

## What types of show are selling best for you?



be turned into an opportunity with arguably more cost-efficient programming available from catalogues, but there is realism when it comes to how the outlook might pan out in 2024.

Koulla Anastasi, managing director at Woodcut International, points to the “financial and budgetary pressures” on broadcasters and streamers, but says “an improvement” is already being seen for the remainder of this year and into next, while Syndicado founder & president Greg Rubidge and Minna Dufton at Minnari Films highlight the potential effect of the US writers and actors strikes.

“These are causing holes in schedules and increasing demand for ready-made programmes that are still waiting for the right platform,” adds Dufton.

The emergence of FAST (free ad-supported television) and AVOD is also being seen as an avenue for growth, with Orange Smarty CEO Karen Young and ITV Studios’ managing director of global partnerships, Ruth Berry, both pointing to the emergent platforms.

“We have the scale to pivot into new opportunities like FAST and digital,” adds Berry, “alongside the existing business with strong relationships that we can evolve in line with client needs.”

“The market is already changing significantly and will continue to change,” continues TVF International’s Poppy McAllister, “but whether or not it will improve is yet to be seen. The transition from pay TV to AVOD/FAST is one to watch.”

### Getting FASTER

The opportunity presented by FAST channels among those in the unscripted sector reflects a broader trend across the distribution business and almost three quarters of respondents say they expect buyers from this sector to increase.

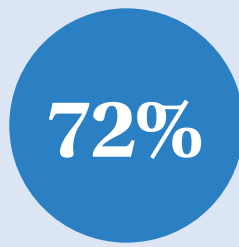
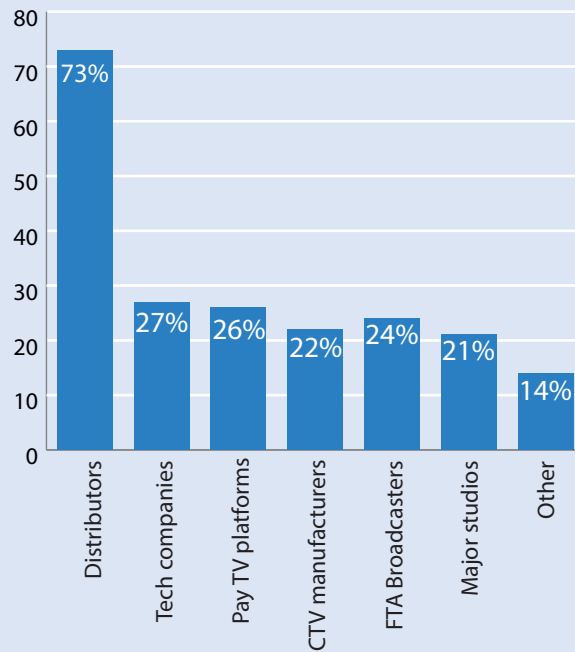
Buyers from regional streamers are also expected to grow in number, with just over 40% of respondents expecting an uptick.

However, increased demand is not widely expected to come from global streamers nor those working for local broadcasters on both the FTA and pay TV side, with less than a quarter of respondents (who were able to pick multiple categories) expecting buyers from these operators to increase.

Revenues from FAST remain in their early stages, however, with 68% of respondents reporting that revenue from the nascent tech accounts for around 10% of their total income, down from 73% in 2022.

A noteworthy 8% of respondents, however, said FAST accounted for between 10-25% of revenues, with a further 10% claiming it brings in between 25-

### Where do expect to see the most activity in entering the FAST space in the next year?



**expect annual revenue to rise over the next year**

50% of revenue.

Perhaps this is a sign of things to come, but it should be noted that some respondents operate largely in the FAST field, potentially distorting the true picture across the sector.

What is clear, however, is the direct role distributors expect to have on the FAST landscape, with the vast majority expecting this sector to be the dominant player in the year to come.

Another nascent tech, Artificial Intelligence, is also being explored but most respondents say usage is at an early stage.

One of the earliest applications being explored is in dubbing, says Bob McCourt, COO for commercial & international at Fremantle, and echoed by numerous others.

While Orange Smarty’s Karen Young sees AI as “an interesting development” that may be useful in “certain areas of the business”, she concludes that: “Ultimately, we are in a relationship business and there is no replacing human contact and experience to generate trust and loyalty.

“These kind of developments are tools that would be used alongside [current ways of working].”

As far as travel and markets are concerned, 77% expect to attend a similar number of events in 2024 as they did in 2019. MIPCOM is the must-attend, with almost all respondents considering it key.



MIPCOM STAND R7.L26

**FEDERATION**  
studios

# LE MANS 55

THE UNAUTHORIZED INVESTIGATION

90'

CANAL+ *Empreinte*  
DIGITALE



# Formats: Keeping competitive

Competition formats have been in high demand over the past 12 months and there's been an uptick in revenue, but economic factors are stalling profit growth

**P**otentially cost-effective and often with the cache of a familiar name, formats continue to be a popular schedule/category filler. It's hard to argue with the results of a show that has been tried and tested on another network before purchase and the bigger companies are sitting on whole flocks of golden geese with some of their major titles.

However, as our Survey results show, rising revenues are not necessarily translating to vastly improved profits when the industry remains in the grip of an economic downturn.

## Escalating costs

The rising cost of doing business is illustrated quite clearly in this year's Survey, with 62% of format distributors reporting that their revenue had increased by as much as 20% over the past 12 months, but overall profit still stayed the same as last year for 81% of them.

Only 19% of companies saw their profits increase upon the 2021/22 financial year and that by around 9% at the most.

Lack of profit understandably means lack of expansion and the percentage of companies expecting staffing levels to change in the next 12 months statistically mirroring how much money they've made – with 81% of companies responding that their workforce numbers will remain the same and 19% planning for a small percentage of new hires.

There is optimism that revenue will continue to climb, with 63% of respondents expecting to this year see up to a 9% rise, while 23% around expecting to see as much as a 19% increase.

However, only 38% of respondents expect market conditions to improve within the next 12 months.

One respondent, Ruth Berry, managing director of global partnerships, at *The Voice and Love Island* distributor ITV Studios, says that: "Due to inflationary pressure, cost increases and reduced advertiser budgets, production budgets are under pressure impacting format sales as well."

However, Cathy Payne, CEO of *MasterChef* and *Survivor* firm Banijay Rights, sees some light at the end of the tunnel, adding: "We expect to see improved



**100%**  
of formats firms have grown their catalogue in the past 12 months

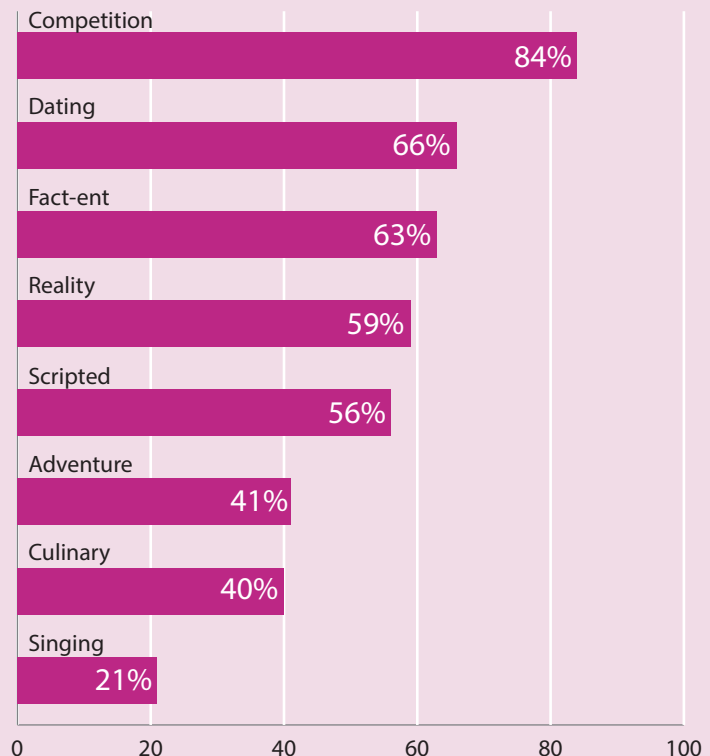
economic conditions along with clarity from those platforms and channels that have been undergoing integration, mergers and/or market correction on their budgets and acquisition and commissioning strategies."

Market consolidation was seen as the greatest challenge for format distributors over the past 12 months, with falling ad revenues and risk aversion also singled out as major difficulties that have been faced by the sector.

## New opportunities

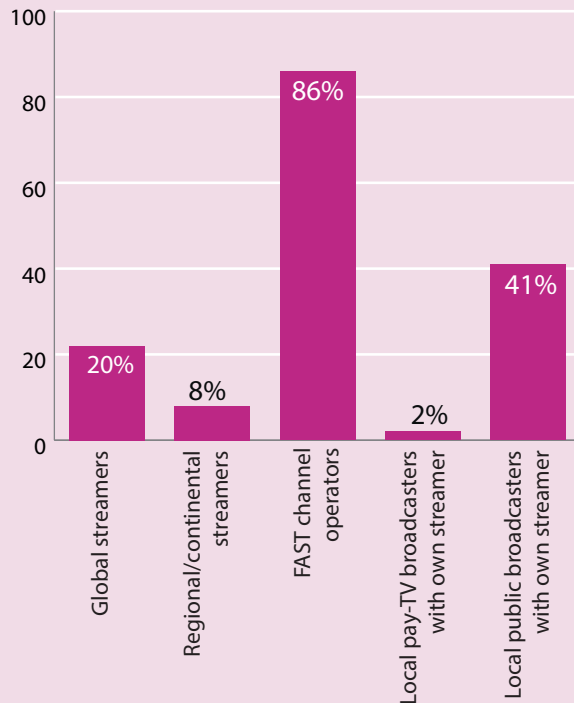
While the majority of the companies surveyed are not expecting to grow their workforces any time soon, there has certainly been catalogue expansion, with every formats firm that took part in the Survey

## What types of shows are selling best for you?





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



responding that they had more shows on offer than this time last year.

Competition series appear to be the best-selling, with 84% of respondents naming this genre as among their most popular, but dating (66%), factual-entertainment (63%), reality (59%) and scripted formats (56%) are also travelling reasonably well (respondents could pick multiple options as to their most popular genres).

Last year, fact-ent was the clear leader with 86% of respondents to the 2022 Survey naming it as their top-seller, but 12 months onwards and only 63% put it in their top categories.

The UK, US, Australia and Central and Eastern Europe were named as the top importers of formats by our respondents, and the large majority of distribution firms (82%) taking part in the Survey are expecting to see more competition coming out of the US in the next 12 months as the studios make more product available to third-party buyers.

“The studios are clearly more comfortable with licensing product to other platforms and channels – it will not be all exclusive to their own platforms. The economics of the studios rely on exploiting all viable windows for their catalogue,” noted Payne.

The strikes in the US were also seen as both an

opportunity and a threat by the distributors, with several companies noting that they were expecting to see a greater demand for non-US content, while others reported that projects had to be put on hold due to attached writers striking – although their comments were made ahead of the WGA and AMPTP reaching a new deal in late September.

## Exploring FAST

With FAST still among the hottest of topics in the industry, 62% of respondents revealed that it contributes up to 10% of their overall revenues, with the remainder of those companies that completed the Survey not currently selling via FAST at all.

However, this space - which is mainly attracting finished tape - looks set to grow, and 86% of respondents expect FAST channels to be the buyers that see the biggest growth over the next 12 months, followed by local public broadcasters, with their own streamer, at just 41% (respondents were able to pick more than one answer).

A not-insignificant 64% of surveyed distributors suggested that the expansion into FAST would likely be powered by sales firms such as themselves moving into the space in the coming 12 months – perhaps sharing some indication of their own interests.

Other respondents said that they expect it to be the major studios and FTA broadcasters that will make the biggest push into FAST in the year ahead.

Looking at other tech breakthroughs, most of the formats businesses surveyed are not using artificial intelligence (AI) in any major ways currently, though some have begun to experiment with it - and other expect to do so soon.

“AI will become very important to lower production budgets so am not using it yet, but am confident I will be in the near future,” said Tanja van der Goes, founder and CEO at All Right Media.

Interest in online distribution platforms has meanwhile almost entirely evaporated, with only 4% of respondents stating that they still use them.

MIPCOM and Content London appear to be the biggest draws for formats firms, with almost all respondents naming these two markets as must-attend.

LA Screenings (82%) and NATPE Budapest (64%) are also popular events among formats distributors, while the relatively nascent Content Americas is also drawing interest, with 38% of respondents adding it to their definite travel plans.

And plenty of travel is still on the cards for most formats distributors, with 86% of those surveyed planning to attend a similar number of physical events in 2024 as they did five years ago.

81%

**of respondents said that they expect their workforce to remain the same over the next 12 months**

# Kids: Steady growth

Children's content distributors have been expanding their catalogues and increasing their profits over the past 12 months, but changing studio strategies may mean fresh competition in the market

**A** strong children's content offering remains vital for global streamers and local broadcasters alike, though depleted budgets and shifting strategies have caused some turbulence in the sector over the past year, TBI's Distributor Survey has found.

The US studios' move from locking in their content on D2C services back to the old model of third-party sales does mean further competition, but revenue and profit appears to be steadily growing for these firms (mostly, see below) while maturing AVOD and FAST channels are providing new distribution avenues.

## Profit and loss

For the most part, kids content distributors reported a healthy 12 months, with three-quarters of all those surveyed reporting that both revenue and profits had risen over the past financial year.

A little over a quarter of respondents (26%) had seen revenue and profits increase by 20% or more, with a further 48% reporting rises of up to 19%. However, it wasn't all positive news, as a further 18% of respondents said that these figures were down by more than 20% on last year.

This is a step backwards from the results recorded in last year's Survey, which found that demand for kids' content had increased revenue and profits for all respondents by around the same percentages as this year, demonstrating roughly consistent growth were it not for the outliers.

While kids' content clearly remains in high demand, this inconsistency can probably be attributed to several factors, but perhaps most likely the financial strains being felt across the sector and the buyers now playing it safe with their acquisitions.

Indeed, risk aversion was identified as the greatest issue facing kids' distributors, with 63% of respondents identifying it as one of the greatest challenges of the past 12 months.

Other hurdles highlighted by respondents include market consolidation and the global rights models of streaming services, as well as delayed payments from these clients.

It's telling then, that looking to the year ahead,



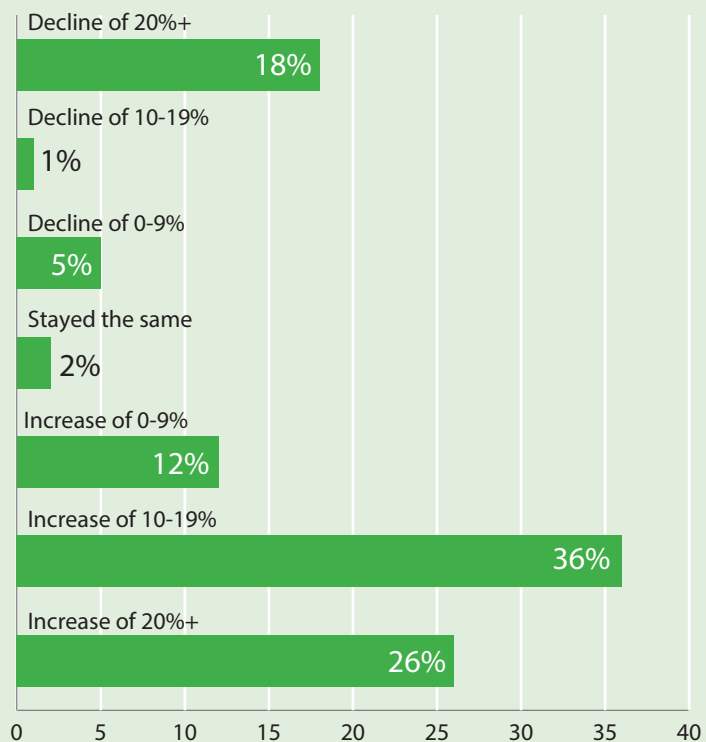
**50%**  
of kids' distributors are commissioning IP without a broadcast or streaming partner

a growing number of Survey respondents - 38% in total - are expecting to see declines in revenue of 20% or more, far more than the 18% drops seen over 2022/23. For those predicting revenue growth, the rate of increase expected is lower than last year.

Nevertheless, 77% reported that they have expanded their catalogues in the past year, while 64% said they believe the market will improve in the coming months.

Sharing their reasoning, respondents highlighted the opportunities created by streamers and broadcasters having less budget to spend on original content, the end to structural changes at major commissioners over the past 12 months and optimism that digital ad revenue will increase as audiences continue to shift to new methods of consumption.

## How did your annual revenue change in 2022/23 compared with the previous year?





“We finally feel that all the streamers have finished their reorganisation and they’re settled in place,” says Monica Levy, co-chief of distribution at Federation Kids & Family, whose sales catalogue includes *Spellbound*, *Theodosia* and *Find Me In Paris*. “We expect the channels will need content and we will be here with our great shows.”

### Old competitors

Animation continues to be in higher demand than live action children’s programming, with 76% of respondents reporting that it is selling best. That is no surprise, but it is an increase on figures from last year’s Survey, when around two-thirds of distributors said that animation was more greatly sought.

The US, UK, France and Germany were all named as the biggest buyers of children’s content, while distributors also highlighted a growing demand from the Middle East, as well as steady business from the Nordics and Central and Eastern Europe.

Despite grabbing a generous number of headlines over the past few months, the Hollywood strikes have not had much of an impact of kids’ content distribution and most respondents don’t seem to be expecting any big knock-on effect.

However, some did share their belief that US streamers in need of content will soon turn to distributors from other countries in the coming months as they seek fresh titles for their services.

Keeping the US in mind, 73% of respondents said that they are expecting the US studios to make more product available over the next 12 months than in



**75%**  
of respondents said animation is selling better than live action content

the previous year.

As one respondent, Sophie Prigent, head of sales for Paris-based *Grizzy & The Lemmings* and *Mystery Lane* distributor Hari, noted: “This means new strong competitors will enter the market, taking share in an already crowded space.

“We don’t expect to be significantly impacted because we distribute only our own IPs, for which we have a premium production outfit, and the trust of our partners who wouldn’t consider our content less qualitative or less of an audience-driver.

“That said, output deals with entire slots filled with studio content would be more of an issue as we can’t create airtime that isn’t available anymore.”

### New sales avenues

The emergence of FAST is of growing importance to kids’ distributors (read more about this on page 2), with an eyebrow raising 12% of respondents revealing that more than 50% of their revenues come from FAST. A further 38% said they receive around 10% of their revenue from these services but that still leaves 50% who indicated that they do not sell via FAST at all. However, as more services crop up – something 88% of respondents expect to see in the coming year – new distribution avenues will increase further opening up.

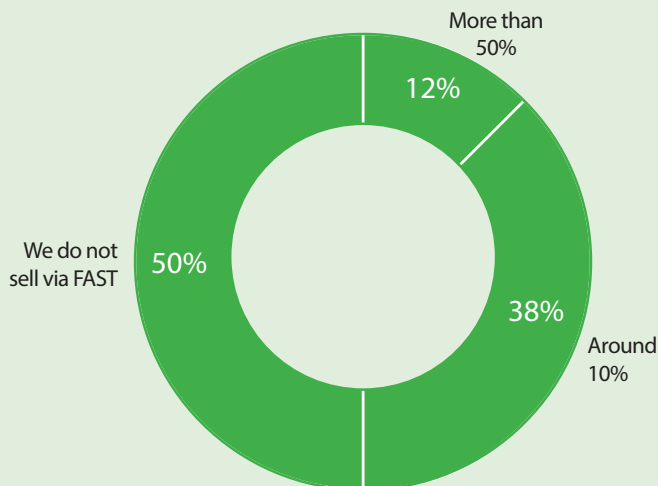
AVOD, meanwhile, is bringing in 10% revenue or more for 77% of kids’ distributors, with 26% revealing that AVOD services contribute more than 50% of their revenue. And it was a fairly even split when it came to windowing, with 51% of firms selling more windows than they were last year.

Claudia Scott-Hansen, principal at Cookbook Media, highlighted that: “AVOD platforms are picking up where linear & SVODs are not supporting shows (for example, limited launches, no promotions or reduced episodes).”

Prigent at Hari, meanwhile, added: “It really depends on the accessibility and popularity of the partners we work with. When thinking about pan-regional players, their penetration sometimes varies from one market to another. The combination of several windows is what really matters. That said, AVOD & FVOD are increasingly significant also because they provide immediate data.”

MIPCOM remains the most important market for children’s distributors, with every respondent marking it as a must-attend event. However, MIPTV is seen as less vital, with only around half of the respondents rating it one of their most important markets, trailing Kidscreen (88%) and Annecy International Animation Festival (63%). **TBI**

### How much revenue do you derive from FAST channels?



# Conclusion: Familiar picture

Revenues continue to rise for most distributors, even if the cost of doing business means profits are not extraordinarily greater – while FAST is still viewed as one of the biggest growth areas, with many firms looking to enter the space

**T**his time last year, the previous edition of this survey concluded that ad-supported services would offer the biggest revenue growth opportunities for distributors in the 12 months ahead.

We've now arrived at that point and the conversation remains largely unchanged. Many distributors are selling a lot of content to FAST services in particular, and yet, just as many respondents to this year's survey told us these buyers amount to just a small fraction of their annual sales, or not at all.

What has stayed the same is the belief that – despite the downturns in the ad market – FAST services are still a major growth area to watch, investigate and exploit. Perhaps a further 12 more months will provide a different perspective.

We also saw revenues on the rise across the board last year, a picture that has continued over the past 12 months with a large number of scripted, unscripted and formats distributors seeing rises of up to almost 20% – less so for kids distributors, whose gains were not quite so substantial.



**91%** of scripted distributors said that crime shows have been among their most popular titles

Crime has been a clear front-runner in terms of genre over the past 12 months, with 91% of scripted distributors naming such shows as among their best-selling titles. This was mirrored by factual distributors, with 68% of respondents naming true crime shows as among their most popular – far ahead of the next highest genres, history and reality.

Competition shows reigned supreme for format sellers having dislodged fact-ent titles – last year's most popular category – by a substantial margin.

With a cost of living crisis and a grim news cycle impacting the public just as much as the industry, could it be that the differing thrills of crimes and competitions are what audiences are looking to escape into when they switch on their TVs? **TBI**

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

This year's distribution survey provides welcome relief from world events, which have been so unrelievedly bad that even news junkies like this writer have been tempted to look elsewhere. TBI's impressively thorough and detailed poll reveals an industry coping with what one respondent lightly refers to as 'headwinds' remarkably well. Every single scripted distributor reported an increase in revenues this year, and well over half of format sellers reported a gain of more than 20%. Times have been tougher in the children's sector, though even here more than a quarter of respondents saw an increase of more than 20%.

Of course, profits are a different story and rising inflation has added to the cost of doing business. But the Hollywood writers' strike – a headwind for some with productions shut down and US presale money staying in the bank – offers grounds for optimism for the year ahead. The world has carried on producing new TV despite the shutdown of most of the US, and many Cannes-bound vendors will be hoping to fill the gaps in schedules that would usually be stocked with US product. FAST channels continue to gain a higher profile and FAST is cited as the sector of the industry expected to see the most growth in the year ahead.

**“Every single scripted distributor reported an increase in revenues this year, and well over half of format sellers saw a rise of more than 20%”**

Tim Westcott, Omdia



Should we worry about the continued popularity of crime in both scripted and factual? Maybe not. At least in the format space, dating shows are second in popularity only to competition shows. Children's distributors could be seen to be more exposed than most to the harsh realities of the modern TV business (a decline in commissions, risk aversion and rising costs,) and another finding that jumps out is that half of the respondents in kids commission new shows without a broadcaster or streamer on board.



**73%** Unscripted distributors expect firms like theirs to be entering the FAST space in the next year



MIPCOM STAND R7.L26

**FEDERATION**  
studios

6X45' DIRECTED BY LOUIS FARGE

# FOLLOW

WHO'S FOLLOWING WHO?



BOÏNE PÛCÈHE

13  
RUE

NBCUniversal  
INTERNATIONAL NETWORKS  
DIRECT-TO-CONSUMER

CNC

SG IMAGE 2022

INDÉFILMS

SOFICA  
Cinéma

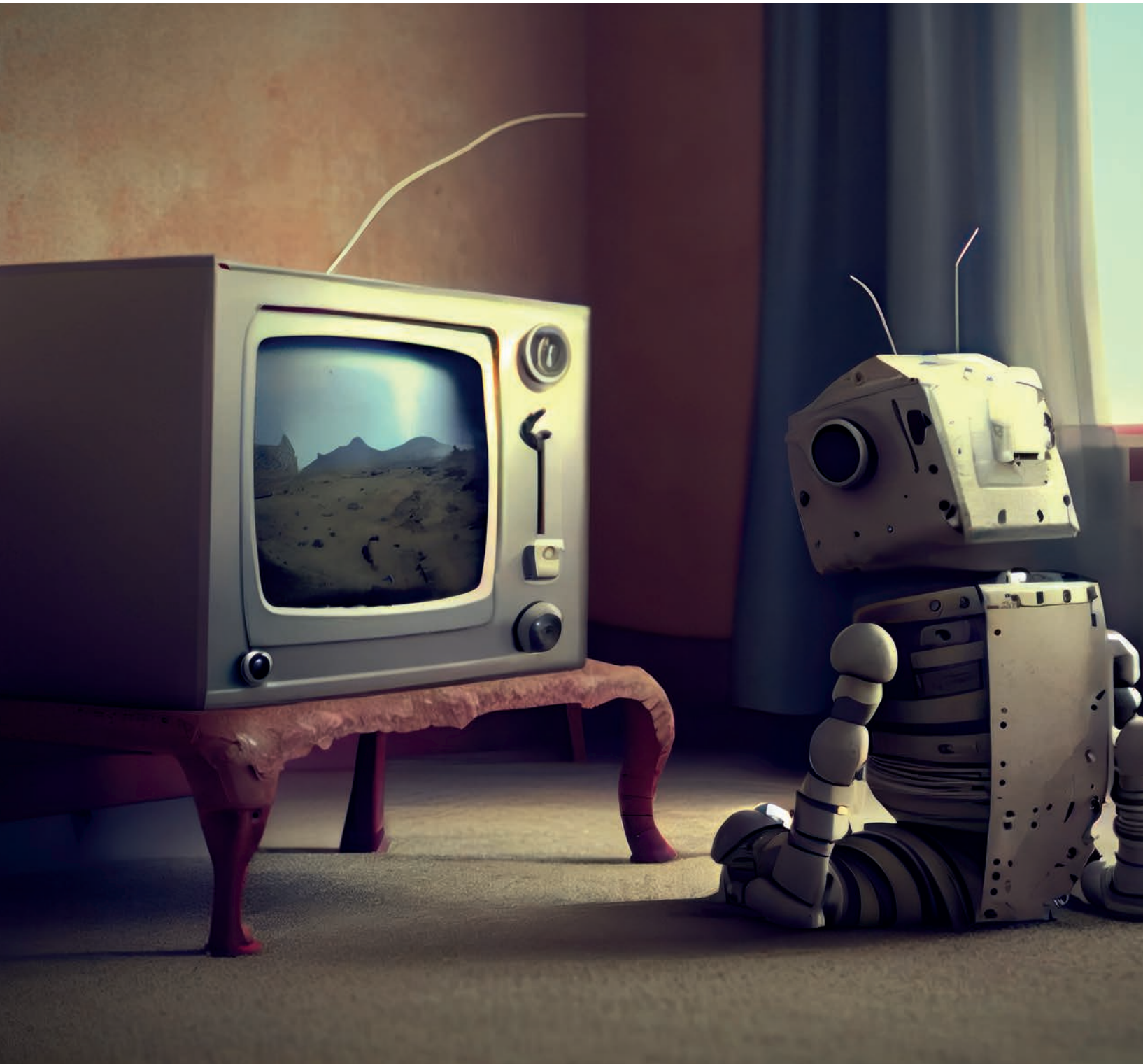
RAYMOND GUSTOBY



# Rise of the machines

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Mark Layton (and ChatGPT) explore the myriad uses for artificial intelligence in the TV sector and how future developments could revolutionise the business





**I**n a short span of years, the idea that artificial intelligence (AI) could become a part of our daily lives has transformed from the stuff of science fiction into very real discussions around how the technology can and does impact how we work.

While we might not (yet) be at risk of termination by a robotic Arnold Schwarzenegger, many in the industry certainly view the rise of the machines as a threat to their livelihoods.

Look to the Hollywood strikes, and the strikers' concerns around AI, and you will see these fears writ large – enough to bring US studios to a standstill as creatives seek assurances that they won't be replaced by the technology.

Content creators often grapple with concerns that AI will gradually encroach upon their livelihoods. As AI technologies become increasingly sophisticated, they can generate text, images and even videos with surprising accuracy. This automation can expedite content production, but it also raises fears of human creators being sidelined.

It's not hard to understand these fears; that entire paragraph above was written by AI-powered language model ChatGPT upon this author's prompt – with AI tools such as this just a click away for anyone that wishes to use them.

### Speeding up development

However, not everyone is entirely opposed to using AI and some have been utilising it as a supporting tool for some time, particular in the animation sector.

Carl Reed, producer of Oscar-winning short film *Hair Love*, and CEO of US animation studio Composition Media (*Bad Grandmas*, *Catapult Feud*), tells TBI he has been using AI machine learning to uncover budget trends and with asset tracking to speed up production time and predict future issues.

“So that's one side, and then in the actual generation of art and animation, during the concepting process, and during development, [to] rapidly generate ideas.”

Reed estimates that AI allows his visual development team and artists to save around 40% of their time by creating generative imagery or by applying some of their work on to footage. He adds that Composition Media is also looking at developing bespoke internal AI tools.

“Generative AI has raised the floor of even what a non-artist can produce. In actual production, you have a very specific need for specific assets – we aren't there yet as to where it can meet that need, but if we can get there, then that gives a boutique shop like ours superpowers,” explains Reed.

“It gives us the ability to compete at a level that

we've never been able to compete before; it gives us the ability to operate in tighter teams; it gives us the ability to operate in faster timelines in a market where the demand is at an all-time high.”

These sentiments are being shared across the animation sector. Speaking to TBI at MIFA in June, Terry Kalagian, president of global animation, kids & family, at Gaumont, said that while the Paris-based firm is firmly opposed to the use of AI in scriptwriting, it has been using the tech to speed up the production process on shows still in development.

“We're not afraid of it and we're using it as a tool, not to replace anyone, but as an initial inspiration for visual development, so that we can have a better language to go to artists and say, ‘OK, this is the thing we're kind of looking for’. Before, it would have taken us maybe months to get there, now it's taking us weeks.”

Benoît Di Sabatino, CEO of Banijay Kids & Family, meanwhile, told us: “We are also using AI as supporting tools, but not more than that, because I think we are opening the Pandora's box.”

### Return of the Jedi

The concern is that once that box is opened, it will lead to job losses and could cause even more dramatic repercussions, as is slowly becoming clear.

Since the 1970s, the *Star Wars* franchise has been helping to push forward developments in both practical and visual effects. Its recent crop of Disney+ shows were not different, grabbing headlines, for good or ill, for their use of AI in innovative ways.

*The Mandalorian*, *Obi-Wan Kenobi*, *Ahsoka* and *The Book Of Boba Fett* have all used AI to recreate either actors' voices or appearances, with AI-driven de-aging and deepfake tech bringing actors Mark Hamill and Hayden Christensen back to the franchise with a younger appearance to match how they looked in their movie outings decades ago.

The technology to take a step beyond a youthful digital makeover – and to instead resurrect an actor (or their voice and appearance, at least) years after their death and insert them in a new show - is now well within reach.

“That's definitely going to happen; there's no question at this point,” says Frank Spotnitz, the Big Light Productions CEO who created titles including *Leonardo* for Rai, *The Man In The High Castle* for Prime Video and was a writer and EP on sci-fi/horror hit *The X-Files*.

“I'd watch that; I'd be very curious to see Humphrey Bogart or whoever it is. But I think it's going to be like watching a cartoon; I don't think it will replace real live



AI-generated image from Adobe Stock



drama,” he told TBI at the Monte-Carlo TV Festival in June.

“I think there already are existing copyright laws. I don’t think you can use Humphrey Bogart or Marilyn Monroe without securing the permission of their estate – but they probably will, that’ll happen,” predicts the US writer-producer.

Speaking on a panel at the festival, Spontitz further suggested that AI-written shows entering the market was an inevitability, and that projects from human creators would, in effect, become premium content.

“I wouldn’t be surprised if, in time, there isn’t a class of entertainment that is wildly popular, and mass produced and inexpensive that is completely AI generated.

“But there will be people who want human created content. It’ll be like fine artists; more expensive, not for everybody. But I want to see Aaron Sorkin write something, not the Aaron Sorkin AI. I want to see Martin Scorsese – I want to know he did that movie by hand, not Martin Scorsese AI.”

Echoing this sentiment, Composition’s Reed told TBI: “You know, McDonald’s didn’t kill restaurants – there’s a purpose for fast food. I will stop there when I need to, but I still enjoy fine dining.”

## The real AI revolution

Production and distribution giant Fremantle has not let the AI revolution pass them by either. Even before the explosion in AI usage over the past year, the firm had been working with companies like Papercup to do synthesised translations, as well as machine learning for predictive analytics around different shows.

In August, TBI revealed that Fremantle had promoted long-standing exec Tom Hoffman to a newly created, dedicated role overseeing how AI can be applied to its entire global business.

*The Book Of Boba Fett* (above) and *The Mandalorian* both used AI to help make actor Mark Hamill appear and sound as he did in the 1980s, while *Ahsoka* (right) de-aged Hayden Christensen to match his 2005 film appearance



“Unlike the last major tech revolution with social media, AI is a transformative technology that is growing to underpin everything we already have been using, from cameras to spreadsheets,” Hoffman tells TBI, explaining the need for this oversight.

“It requires a central position of technical empathy to make sure a talented employee who does not know what [AI program] Midjourney is, is not afraid to ask and subsequently learn it. Likewise, if a maverick editor in Germany has discovered a game-changing post-production tool, we win when our editors from Spain to Indonesia also know about it.”

Hoffman highlights the two main uses of AI in the industry, which he refers to as “the creative bucket and the productivity bucket.”

“Generative AI may seem like the most obvious entertainment panacea, but anyone who has used these tools knows they aren’t as creative as you would expect.

“That’s fine, though, because when we start to look at it more realistically, the practical applications start to reveal themselves; like machine learning filters to upscale 1980s TV into 4K HD.”

Hoffman suggests that the true major uses for AI are less about the tech itself and more “the inspiration it is bringing for clever people to look at their work now and come up with new solutions. That cultural shift is the real AI revolution.” **TBI**

## The Analyst’s View on AI

“The speed of development in the AI space is very quick; however, the speed of adoption can be much slower. Creatives will need time to develop skills and products using these tools, while organisations and studios need to build trust in new technologies and invest in them.

“On-set virtual production [for example] gained notoriety from its use in Disney+ series *The Mandalorian* (2019) for reducing the production costs of the series, but the number of virtual production stages is still limited, and they are by no means an industry standard yet.”

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



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# What the writers won

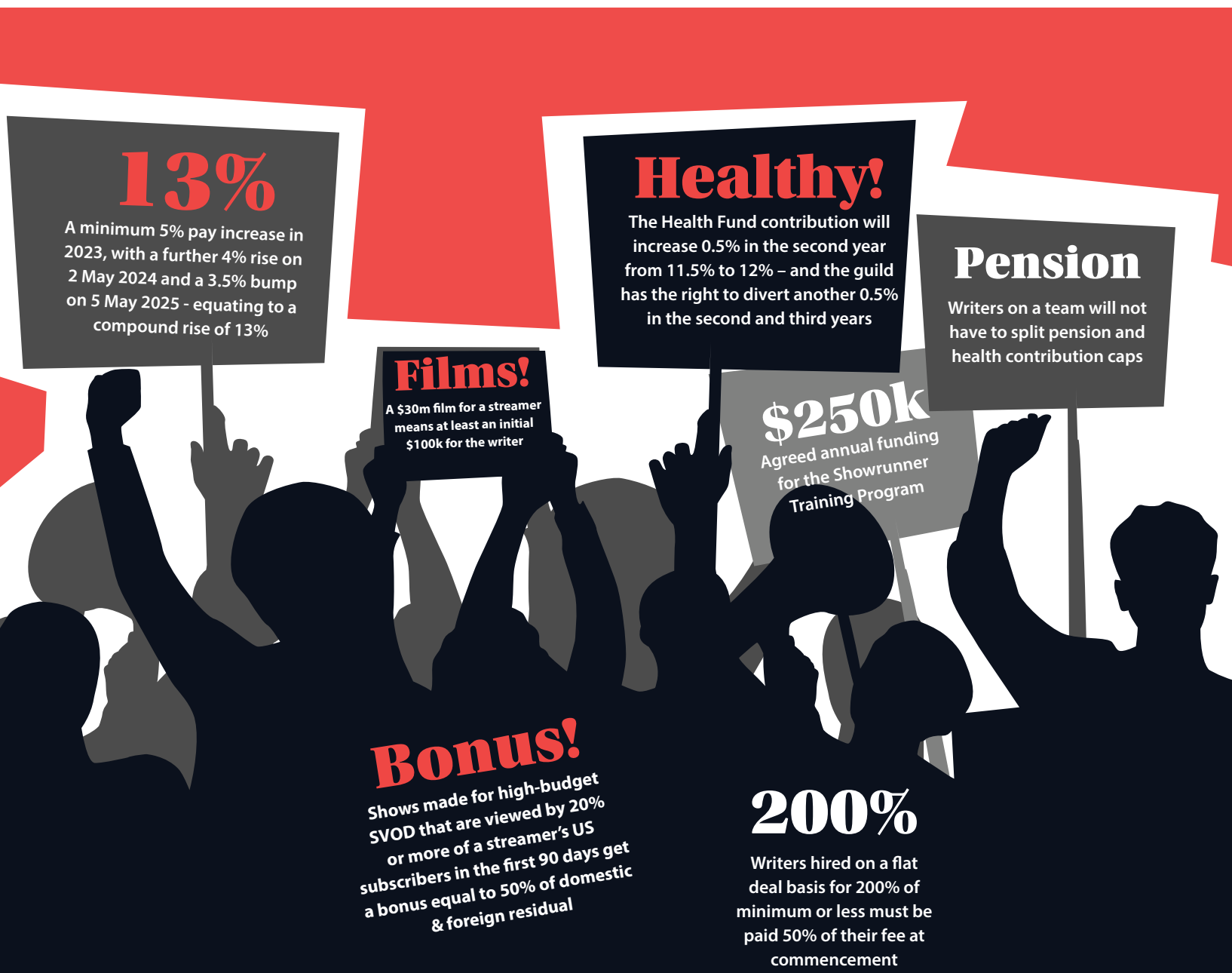
After months of strike action and a near \$5bn cost to the Californian economy, the WGA and AMPTP reached a deal that saw Hollywood writers return to work. But what did they get from their demands? Richard Middleton finds out

**T**he Writers Guild of America (WGA) formally ended its strike action against the Alliance of Motion Picture and Television Producers (AMPTP) in September, with guild leaders voting “unanimously” for a new three-year deal.

The WGA members put down tools in May, forcing production hiatuses for US studios including Warner Bros. Discovery, Paramount and NBCUniversal, as well as streamers like Netflix and Apple TV+.

But with the strike nearing 150 days and a near \$5bn cost to the Californian economy, WGA members were told they could return to work after the WGA’s East and West coast leaders voted for the Minimum Basic Agreement (MBA).

The new pact, which the WGA described as “exceptional”, runs to May 2026 and provides a minimum 5% pay increase this year, with a further 4% rise on 2 May 2024 and a 3.5% bump on 5 May 2025.





The 94-page contract also includes increased health fund and pension contributions, guard rails around Artificial Intelligence use, staffing minimums around writers rooms and a new formula for residuals.

“Foreign streaming residuals will now be based on the streaming service’s number of foreign subscribers for services available globally,” the WGA contract summary explained, “amounting to a 76% increase (including a 2.5% base increase) to the foreign residual for the services with the largest global subscriber bases over three years.”

It means that Netflix’s three-year foreign residual, for example, will increase from the current \$18,684 for a one-hour episode to \$32,830.

With shows made for streamers that are viewed by 20% or more of its US subscribers in the first 90 days of release, writers will receive a bonus equal to 50% of the fixed domestic and foreign residual (despite the views being calculated based only on US audiences).

The bonus also applies to shows or films in the first 90 days of any “subsequent exhibition year”, but would not apply to series made for TV that are then moved onto streamers, meaning those behind *Suits* would not benefit from the recent uptick in viewership on Netflix.

AMPTP members have also agreed to provide confidential viewing figures on originals, namely the total number of hours streamed in the US and globally, which the WGA can share in “aggregated form.”

“What we have won in this contract,” the WGA told its members, “most particularly, everything we have gained since 2 May, is due to the willingness of this membership to exercise its power, to demonstrate its solidarity, to walk side-by-side, to endure the pain and uncertainty of the past 146 days. It is the leverage generated by your strike, in concert with the extraordinary support of our union siblings, that finally brought the companies back to the table to make a deal.” **TBI**



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Foreign streaming residuals now based on subs numbers – meaning up to a 76% increase

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## French connection

Nick Edwards explores what has made France such an attractive location from which to launch international groups and speaks to companies across Europe to find out how they benefit from the country's ecosystem

It is almost two decades since gritty crime drama *Engrenages* (aka *Spiral*, 2005) changed the world's perception of what French TV drama could be. Since then, France has produced many ground-breaking hits, from *Lupin* and *Le Bureau Des Legendes* to *Dix Pour Cent* (aka *Call My Agent!*), to name but a few. Yet arguably even more impressive is the impact that French production and distribution outfits – from StudioCanal and Federation Studios, to Mediawan, Newen, Gaumont and Banijay – have made on the global stage during this period.

“Regulation is behind much of the explanation,” says Pascal Breton, founder & group chairman of Federation Studios, with his comments highlighting that France was the first country in Europe to reach an agreement with Netflix and Amazon to regulate content investment and rights ownership as part of the European Union's Audiovisual Media Services Directive (these started to be put into law in 2021).

Not only is the ownership of IP shared with the streamers, as well as pay and free TV channels, but there is also an obligation for companies to invest 20% of their local revenues back into new French productions.

Today, France is in a unique position in Europe. “There are almost no players like Gaumont, Banijay, Mediawan or Federation in Germany, Italy or Spain,” says Breton.

To achieve this environment, Breton and his industry peers sat around the table with President Macron and figured out how to work with the new demands of the streaming giants.

“Everything belonged to the streamers, but we managed to negotiate with the government and created a system that really shares the ownership of the shows between the channels, the streamers, the producers and the creators,” he says. “They have obligations to invest in our shows and they have an obligation to share the intellectual property of these shows,” he adds.



*Engrenages*, *Le Bureau Des Legendes*, *HPI*, and *Dix Pour Cent* are among the most successful scripted shows to emerge from France in recent years

This legislation has not curtailed opportunity or creativity. “These ring fences do help to protect local producers and content, and does give producers an advantage there,” says Marc Lorber, the former Lionsgate head of TV acquisitions and co-productions, who recently returned to his role as an international format, programming & production consultant, “but not at the risk of just making programming that fits simply to the guidelines and won’t travel well.”

## Lessons for others

The expansion of French groups on the international stage, however, had been occurring years before the more recent streamer developments. Indeed, France was already ‘well’ regulated, meaning it faced little ideological resistance when it came to implementing these most recent changes.

Thus, it has moved faster and been able to secure larger investment targets than almost any other European country.

Legislation has also built something of a shield around an industry that consists of not only supplying public service broadcaster France Télévisions and commercial rival TF1, but also multiple other models such as Canal+, Arte, M6 and OCS.

“Highly entrepreneurial with a long history of creating shows that travel,” is how Philippe Levasseur, head of Newen Studios International, describes the character of the French market.

And like cinema did in the 1950s, French TV is now attracting the world’s attention. The country has always been famous for producing great film directors, ever since the days of Truffaut and Godard, but writers of TV have arguably made less impact on the global stage. However, this has changed in recent years and France now boasts the kind of talented and experienced showrunners – including *Engrenages*’ Anne Landois and *Le Bureau Des Legendes*, Éric Rochant – it once lacked.

## Scripted surge

International buyers are also being drawn into French programming by the ecosystem’s ability to provide a fertile environment for innovative IP. Unifrance-CNC’s recent export data, revealed in September, showed that sales-generated revenues were up 15.4% to €214.8m (\$231m) – their highest level ever.

Shows such as *Vortex* and *Women At War* both sold to Netflix, while young adult series *About Sasha* was picked up by Disney+, while shows including *Marie-Antoinette*, as well as ongoing procedurals *High Intellectual Potential (HPI)* and *Deadly Topics*, also travelled.

There have been format successes too. *Call My Agent*, one of the biggest recent French-language success stories, has inspired multiple remakes from countries and regions as disparate as the UK, South Korea, the Middle East, the Philippines and Poland.

*HPI* had already proven successful in TF1’s Thursday night cop show slot, which led to more than 100 territory deals, and a remake was recently taken from pilot to series by ABC in the US, to be

known as *High Potential*. Showtime, meanwhile, has announced it is remaking Canal+’s *Le Bureau Des Legendes*, with George Clooney on board to direct.

“Now, the Americans respect us as creative partners, business partners and collaborators. That was not the case a decade ago,” says Levasseur.

Well-crafted French action movies, such as Netflix’s *AKA* (in which former footballer Eric Cantona has a role), have also performed internationally for streamers, while auteur style series such as *Bardot*, which was pre-sold to Netflix in France and beyond, underline the opportunities for a complimentary relationship between film and streaming in France.



**“We managed to negotiate with the government and created a system that really shares ownership of the shows between the channels, the streamers, the producers and the creators”**

Pascal Breton, Federation Studios

Packaging internationally recognised French culture into TV shows that can be sold at home and abroad is a well drilled procedure: Canal+ series *Versailles* was a typical example and the model can also be applied to docuseries such as Netflix’s *Tour De France: Unchained*, which are again engaging sizeable chunks of the international audience, as well as domestic.

## European advantage

In straightened times, co-productions are also becoming increasingly important for ambitious projects in Europe. Lorber points out that “the EU remains the largest aligned block of countries within which to co-produce and in doing so has access, for instance, to funds from Creative Media Europe and Eurimages, as well as entities like the Alliance (France TV, Rai & ZDF) and the European Broadcasting Union.”

Additionally, since Brexit, the UK has lost eligibility for some of the soft money that enable many of Europe’s prestigious co-productions to get off the ground, so it is a less attractive lead partner on such ventures.

France, however, is well placed to helm projects. *Around The World In 80 Days* is a case in point: written by a Brit, based on globally recognised French story, starring major European actors and financed by pan-European partners (France, Germany and Italy). Its producer, Federation, is now working on a similarly structured espionage thriller on which Eric Rochant will be showrunner.

And Hollywood does not only want to adapt French shows but to work with French companies too. Plan B, the multi-Oscar winning production company, is co-owned by Brad Pitt and Mediawan, which in turn has launched a US-based division.

Elsewhere, Anonymous Content (*True Detective*, *The Revenant*) partnered with Federation in 2021 on a joint venture, Anonymous/Federation, based in Paris, that is focused on developing and producing

premium TV and film for both French and global audiences.

Importantly, France's large but independent production groups also offer a rival model to Hollywood's huge studios and associated streaming platforms. "There is a real point of difference in being able to utilise the European powerhouse and being able to stand somewhat independently of the US market," says Kate Bennetts, MD of Ringside Studios (a joint venture with Newen), which made the French/English drama *Liaison*, starring Vincent Cassell and Eva Green for Apple TV+.

Sabine de Mardt is CEO of the German branch of Gaumont. She believes the company behind *Barbarians*, *The Wasp* and the upcoming *German House* offers something unique: "While many international companies in Germany focus on entertainment formats, Gaumont – unlike hardly any other company – looks back on a rich and long history of cinematic and serial storytelling with long-standing successes."

### Across the spectrum

France has also supported a range of groups: StudioCanal, for example, operates in nine major European markets, plus the US, Australia and New Zealand, while smaller but fast-growing outfits are also emerging, such as Asacha Media Group (AMG), which has a controlling stake in Red Planet Pictures in the UK, amongst others.

Each company has its own global strategy and some see themselves as essentially international entities rather than primarily France focussed. Others see expanding their footprint outside of France a priority, whilst others do not.

"We are quite happy with our current size and definitely not looking to aggressively expand," says Levasseur of TF1 Group-owned Newen, which has offices in 10 countries. "I like knowing the managers of the individual companies personally, and we are mindful of owning companies that compete in same territories."

For a UK perspective, Bennetts says Newen has assembled "a like-minded, collaborative group of companies from all across Europe", adding that this also allows companies like hers to "discuss ideas and generate projects" with sibling firms across the group.

"Gaumont is an independent, truly European family-owned company," says de Mardt. "It is a rare phenomenon nowadays in a growingly competitive margin focused industry."

Indeed, with so many disruptive forces running roughshod through the US landscape, France's seemingly more sustainable model has become attractive to global streamers, too.

"Streamers don't want to spend 100% of the budget but they may want to spend 50%. For that they are willing to leave us free TV rights and worldwide rights. Their priority is to exploit the show locally," says Breton. And this is part of a wider trend.

"Owning 100% of rights is becoming increasingly unusual," he continues. "Free TV doesn't want everything because they can't afford to pay for everything. Even pay TV can't afford to own 100% of the rights forever, it's too expensive. So, more and more hybrid models are being created between French traditional channels such as TF1 and Amazon, for example."

There is also a greater emergence of countries seeking to protect local content and their own soft power initiatives and cultures. "Not just in France," adds Lorber, pointing to developments in Denmark and

Australia. It is also worth noting that several of the world's major TV markets take place in France. "With events like Series Mania, MIPCOM and La Rochelle [Festival de la Fiction], I've found more engagement by and in the market than ever before in France."

Couple these positive attributes to the volatile share prices, strikes and general existential uncertainty in the US and the appeal of making a show in Europe grows further. "Of course, it's also appealing to make a show for 10 times less than it would cost you at home. Nowadays there is the added bonus that a French show may become popular in America too," says Breton, reflecting on how streaming has led to US audiences consuming more imported drama.

As a result of these positive factors, the climate in the French industry is in stark contrast to much of the rest of the world. Whilst the fall-out in the streaming world and beyond continues, France is in a good position comparatively.

"Two years ago it was easier to sell to Disney or Netflix," admits Breton, "but they still need more shows for their audience and [to meet] their obligations. New players such as HBO, Apple TV+ and Paramount+ hadn't really started serious commissioning before the new legislative changes were implemented. And, of course, they need content if they wish to stay (which they do). They all need drama and they all need French drama, and of course all the local players still need content," says Breton.



*Liaison* is a French/English drama series for Apple TV+ from Ringside Studios

The Federation chief admits the local market "is slowing down, but not that much" and he points to an underlying reason why so many international groups have emerged from France.

"It's been stable for the last 12 months and I think it will be stable for the next two years. It's not very fast-growing but it is a growing market and it's a strategic market. It's not extremely profitable but it is stable."

These are key factors for investors when it comes to backing companies that have the intention to grow and it's also a convincing argument that the country's model should be explored by others.

"It's strategic because if you have the best talent, the best movies and the best series, that's a lot of IP that will have a lot of value in the future," says Breton. **TBI**



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## A place at the table

Marco Ferrarese explores what drove India's \$10bn merger between Sony and Zee Entertainment and how it highlights the potential of one of the world's largest yet most underrated markets

*Call My Agent: Bollywood* is an Indian remake of the French series for Netflix

**W**hat happened in August in India, the world's most populated country, marked the beginning of what many forecast to be a turning point in the history of Asia and the global TV industry.

In a deal nearly two years in the making, Japanese giant Sony Corporation merged with Zee Entertainment, India's largest media group and owner of more than 70 local TV channels, a film studio and a huge catalogue

of movies. The end of this long and challenging deal drove another nail in the coffin of India's linear broadcast industry in favour of subscription-based video-on-demand (SVOD) and over-the-top (OTT) streaming services.

"If you look at a country's advancement, the entertainment field expands in the latter half of the development phase, and we're seeing that now in India," the CEO of Sony, Kenichiro Yoshida, said in an interview at the company's headquarters in Tokyo.





Sony understood that India's TV market could no longer be ignored: the South Asian nation is set to be the world's third-largest SVOD market after the US and China with 180 million subscriptions expected by 2027, while a valuation of \$15bn is predicted by 2030.

According to a 2020 survey by TV monitoring agency Broadcast Audience Research Council, 210 million Indian households own TV sets, a 6.9% increase from the 197 million surveyed in 2018. Even the reach of TV increased

by 6.7%, from 836 million in 2018 to 892 million in 2020, and the numbers keep rising.

### Cross-pollination & competition

The long-awaited merger followed a painful approval process, requiring several regulatory hurdles related to Zee's shareholders to be overcome. But now, the new Sony-Zee entity has a \$10bn potential, with the Japanese giant indirectly holding more than a 50% interest in the new conglomerate. Catering to a diverse nation of 1.4 billion people, Sony hopes to replicate in India the huge commercial success it achieved in the US, offering TV shows, animation, films and video games that provide endless cross-pollination opportunities.

Yet a giant market still requires considerable skill to navigate. While Sony and Zee were trumpeting the good news about the merger, one of the company's main local competitors, OTT streaming service Disney+ Hotstar (which is thus far India's largest operator with 52.9 million paid subscribers as of 1 April 2023 or a 29% share of India's 171 million streaming subscriber base), announced that an astounding 12.5 million memberships had been cancelled in the quarter ending June, having lost rights to Indian Premier League cricket.

This is a reminder that, albeit confident, Sony/Zee is entering a crowded and highly competitive space – think of Viacom18, owned by millionaire Mukesh Ambani, which in 2023 merged its two OTT platforms (JioCinema and Voot) and at the end of August secured digital and TV rights to India's domestic cricket matches for the next five years.

While the market is huge, the impact of global streamers remains somewhat limited. US-based Netflix and Amazon opened Indian branches around 2016: Amazon Prime Video now has about 12.4 million subscribers and has announced investments of 20 billion rupees (\$240m) for original Indian content. The streamer offers English content and has been available in six Indian languages since December 2018.

Meanwhile, Netflix in India has secured between 8 and 10 million paid subscribers, according to the *Economic Times*, despite prices that are rock bottom: a monthly mobile-only Netflix subscription comes in at 149 rupees (\$1.79), while Amazon Prime Video starts from 179 rupees per month.

### Pandemic pivot

The crucial point that the Sony/Zee merger really highlights is the dynamic moment of transition that India's TV and entertainment industry is experiencing, with OTT turning its traditional film-dominated model upside down.

**\$15<sub>bn</sub>**

India's SVOD market is forecast to be worth \$15bn by 2030

Before the pandemic, billboards plastered with huge Bollywood movie posters were common in any medium to major Indian city. These days, those advertising spaces have progressively switched to promoting TV series, largely because of the rise of OTT streaming services during the lockdowns. This changed consumption patterns dramatically, helping younger generations access more international content, some of which made Bollywood productions look outdated and, consequently, not as fashionable.

Large financial investments in filmmaking shifted to producing episodic TV, especially in the fast-paced Hindi-language content industry, where demand for more drama series skyrocketed amidst a crowded and competitive field.

Scripted formats now have higher budgets compared to their earlier unscripted siblings such as *India's Got Talent*, *Voice Of India* and *Bigg Boss* – all Hindi-language adaptations of UK and US shows.

There are now Indian versions of numerous western shows, ranging from Netflix's *Call My Agent: Bollywood* (produced by Banijay Asia, the joint venture between Banijay and stalwart Indian film producer Deepak Dhar) for Netflix, and *The Good Wife* and *The Night Manager* on Disney+ Hotstar. Adaptations are faster and easier to churn out as they rely on pre-existing formats that help sate the appetites of Indian streamers constantly hungry for new content. But adapting also creates a very inward-looking, limited market – there is little demand for localised Indian remakes (although there is interest from the Indian diaspora), especially when the original versions are still on air in other countries.

To get around this hurdle, there is a growing consensus that more truly original Indian content is required, especially unscripted formats, which can be standalone and perform better in international sales.



*The Night Manager* (above) is a remake for Disney+ Hotstar, while *Made In Heaven* (below) has been well-received on Amazon Prime Video

## Competition & choice

Despite these challenges, India remains home to an incredibly diverse and engaging array of content, particularly scripted. Fierce competition has generated great choice, to such an extent that it may be difficult to navigate the veritable jungle of South Asian content for starters.

For those bingeing, Netflix and Amazon Prime Video are the most easily accessible international services: the latter has been behind well-received series such as *Made In Heaven* (2019), a nine-part series about the Delhi netizens who work tirelessly to put on the biggest, most ludicrous Indian weddings, and crime thriller *Mirzapur* (2018-2020), set in the mafia underbelly of the Indian state of Uttar Pradesh.

Netflix's most notable Indian series remain *Sacred Games* and *Leila* from 2019, the latter a dystopian Indian original that's slightly influenced by Hulu's adaptation of *The Handmaid's Tale*. Regarding non-fiction, Netflix's reality TV series *Indian Matchmaking* (2020) investigates the hyperlocalised Indian tradition of arranged marriage through its modern connotations.

Suppose India will keep developing as an even bigger, stronger, booming economy by 2031, doubling its GDP as predicted by the Morgan Stanley Report 2023. In that case, even its OTT industry will keep refining, eschewing formats in favour of more thoughtful and unique local content. "We have a lot of stories to tell, don't ape the west," said Aashish Singh, formerly with Netflix and currently a producer at Lyca Productions, at the latest Content Hub annual industry summit in Mumbai. "Play with your characters, play with your culture... the world is out there, wanting to watch." **TBI**





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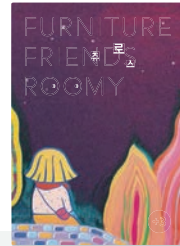


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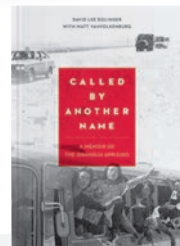
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# Having a moment

Marie-Agnès Bruneau takes a deep dive into French drama at La Rochelle's Festival de la Fiction and finds a luminescent industry that is expanding its scope on all fronts

**L**a Rochelle's 25th Festival de la Fiction in September marked another renewal for French drama, with greater diversification across genres and styles but also in terms of outlets, talents and producers.

The breadth of France's drama output was perhaps best illustrated by the shows that won awards at this year's event. Prime Video took the best 'one-off' award with *Drone Games*, created by Olivier Abbou (*Black Butterflies*), while the best one-hour series prize went to a broadcaster without deep pockets, 13ème Rue, with its thriller *Follow*, which was also the most screened drama at Unifrance Rendez-vous the week before.

Similarly, the third season of multi-language comedy *Parliament* – a digital show produced for France.tv streamer Slash – won the award for best half-hour series. The show represents France Télévisions' efforts in young adult digital originals, with the service also launching daily teen series *Deter* this autumn as the streamer looks to build audience.

## Talents & topics

It wasn't all about the awards, though: French broadcasters and streamers also brought new shows. France Télévisions' *Infiltré(e)* is the reunion of talents from classic series *Le Village Français*, while Canal+ was showing a pilot of its new legal series *66-5 (Conviction)*, from the same creator and producer as *Spiral*.

Prime Video, meanwhile, premiered its new comedy *Killer Coaster*, created by Nikola Lange and Thomas Mansuy, who made a name for himself with Slash's young adult series *Derby Girl*.

France Télévisions was also showing the first episode of *Sambre*, the new mini-series from Jean-Xavier Lestrade, which explores historical serial rape cases, with the show looking to depict and denounce the culture around the crime.

Indeed, public broadcasters have increasingly been looking to tackle broader subjects, including diversity and societal issues. France Télévisions had a TV movie about a woman who becomes blind and a thriller series dealing with gay issues, while many series explored themes around feminism. At its presentation, the pubcaster said it wants drama that resonates with the times.

"We want to shine a light on the anonymous," said Anne Holmes, head of programmes & scripted, as she looks to push back against criticism for having too many crime dramas by diversifying. Last year, for example, the broadcaster went for sci-fi series *Vortex*, while it is also developing more costume and classic literature-based dramas, with a sitcom in demand. "There is a need for comedy," added Holmes.

Alongside societal issues and thrillers, La Rochelle also reflected lighter series with Arte showing *Sous Contrôle* (aka *Under Control*), an



attempt at a political comedy series that had already been awarded at *Séries Mania*. The channel also won several prizes with its pandemic-based romantic comedy movie *Cheers To Joy*, while another series - *Loulou* - tracked the life of a broke and eccentric mother.

Dramas slated for 2024 include kung-fu series *Machine* and Arte's drama director, Agnès Olier, used her first presentation to explain that she would be "continuing the work" of her predecessor, adding that she would be "going where you won't expect Arte to go, looking for bold projects and promoting talents' visions."

## M6 remains 'Vigilante' as Netflix eyes returners

On the returning series front, M6, which is increasing its output, premiered pilot episodes for its new missing children series, *Vigilante*, something the broadcaster had not done in 15 years.





The channel has also taken a risk with a spy series about the November 2015 Paris attacks, *Les Espions De La Terreur*.

Returning series are also now what Netflix is primarily looking for and the streamer used its presentation in La Rochelle (at which it showed no drama) to highlight that having 10 million French members meant its demands for scripted were similarly vast.

In French series, the company is mostly looking at three genres. Firstly, there's comedy that promotes a point of view, such as political black comedy *En Place* (aka *Represent*), from Jean-Pascal Zadi, which got a second season.

Secondly, there's action, such as upcoming female-judge-led series, *Furie*; and thirdly, thrillers.

The streamer, which launched the third season of *Lupin* earlier in October, will still have a few limited mini-series, it said, such as its new show on late French businessman Bernard Tapie.

*Sous Contrôle* (aka *Under Control*) is a political comedy series from French broadcaster Arte, which was feted at this year's *Séries Mania*

## Renewal & refresh

Next to French drama's renewal on the commissioning side are the green shoots emerging in the production sector. *Follow*, for instance, is produced by Bonne Pioche Story (Victoire d'Aboville), the scripted arm of a factual producer now part of Federation Studio that is less than three years old and which has also been behind M6's *Vigilante*.

And whereas many execs' career goals once tended to focus on becoming a channel commissioner, the trend now is for channel bosses to depart and become producers themselves.

Head of TF1 drama, Anne Viau, joined Federation Studios last month to create *Quelle Aventure!*, and in the Spring, Olivier Wolting



of Arte announced he was joining Asacha Media's Mintee Studio. "For nine years I was heading drama at Arte," he said. "I was getting a bit frustrated not being involved more and working with writers during development."

Some talents are also getting attracted by the production side of the business, such as actor Audrey Fleurot (*HPI*, *Women At War*). A president of the jury this year, Fleurot has set-up her own production company – Bahia Blanca – together with group UGC, with an eye on developing scripted shows in which she will not necessarily have the lead role.

## Streaming & funding

Business-wise, French producers are less worried than those in other countries about streamers possibly reducing commissions because of local production obligations.

Writer-director organisations, together with the producer unions of drama, animation and documentaries, even managed to sign an agreement last week improving the deals with Netflix, which has to dedicate 20% of its French revenues to French film (4%) and TV production (16%).

Now, 68% of that output – up from 66% before – will have to be independent (i.e. with producers retaining some rights). The deal also improved minimum investment in docs and animation, as well as the ratio of French-language content. Furthermore, the unions managed to get rid of the possibility that Netflix could meet 5% of its obligation with unscripted reality and formats. (Of course, unscripted producers unions did not sign the new deal.)

Nevertheless, producers union USPA said it was downsizing its estimate around streamer commissions: instead of a potential 200-300 annual hours, it is now set to be no more than 200 hours, they said, and more probably 150 or 10% of production volume. Traditional broadcasters will remain the main commissioners, the union said.

The issue of rising costs against static broadcaster funding remains an issue, and pre-sales and international co-productions were down last year, which USPA said the industry should be vigilant about.

French drama sales export figures were at their highest over the past 12 months, but it was suggested that this had been driven by a handful

*Killer Coaster* for Prime Video is the new series from Nikola Lange and Thomas Mansuy, who made a name for himself with the YA series *Derby Girl*

of titles, while competition is rising from other countries such as Spain.

On the international co-production front, both pubcasters Arte and France Télévisions said they remain as committed as ever to drama. Arte is continuing its European tour "with five European co-pros broadcast this year," said Alexandre Piel, following his promotion to become deputy drama director.

That included hit Belgium comedy *Des Gens Bien*. "2023 marks the tenth anniversary of the strategy," he said, "and we have worked with 21 countries so far and with a number of remarkable talents." Upcoming series include *DNA*'s second season, along with a couple of Swedish dramas, such as a new adaptation of Ingmar Bergman's *Faithless* script. "Scandinavia is an important pillar to us," he added.

The channel is also investing in pre-buys and acquisitions, having stepped in on the second season of *Vigil* from the BBC and picking up *Séries Mania* grand prize winner *The Actor*, from Iran. It is also buying shows for its on-demand platform, which carries 40 series including *Bloody Murray* and *This Is England*.

France Télévisions, meanwhile, has 20 projects in development with the Alliance (ZDF and Rai), with the next show to emerge being *Concordia*. It is also active through the European Broadcasting Union's pre-sales system and is a part of the European Writers Club initiative (read more about this on page 68), which already supported the channel's teen drama *Alpha*.

As for international pre-buys, shows include Irish mini-series *The Boy That Never Was* and BBC's *Best Interests*, along with two Ukrainian series involving numerous partners, *Those Who Stayed* and *In Her Car*.

## Windowing & writing

Contradictory signals were given regarding the co-ventures between platforms and traditional broadcasters, which had multiplied last year.

While TF1's new head of drama Anne Didier said that the channel had several projects in development with Netflix and others, France Télévisions programmes & channels boss Stéphane Sitbon-Gomez admitted that despite numerous projects that were meant as co-ventures with streamers, there had been no progress.

Netflix said it was open to opportunities, on a project-per-project basis. "The thing is to find projects suitable for each," added Didier.

And those creating such projects – namely the writers – were out in force at La Rochelle, which was as busy as ever in terms of numbers. "There is a rise in the writer's role, or more exactly of the creator's role, who is now really at the centre. This wasn't really the case 20 years ago," noted festival president, Stéphane Strano. "And there is also a rise in the ambitions of producers and of enhanced production values."

There have also been improvements on gender disparity, with audiovisual body the CNC detailing an improvement in the number of women benefiting from its grants. Female directors made up 32.9% in 2022, the highest level ever and up by 4% on 2021, and by 14% on 2016. Budgets of the dramas they direct remain 20% less than shows directed by men, however. **TBI**



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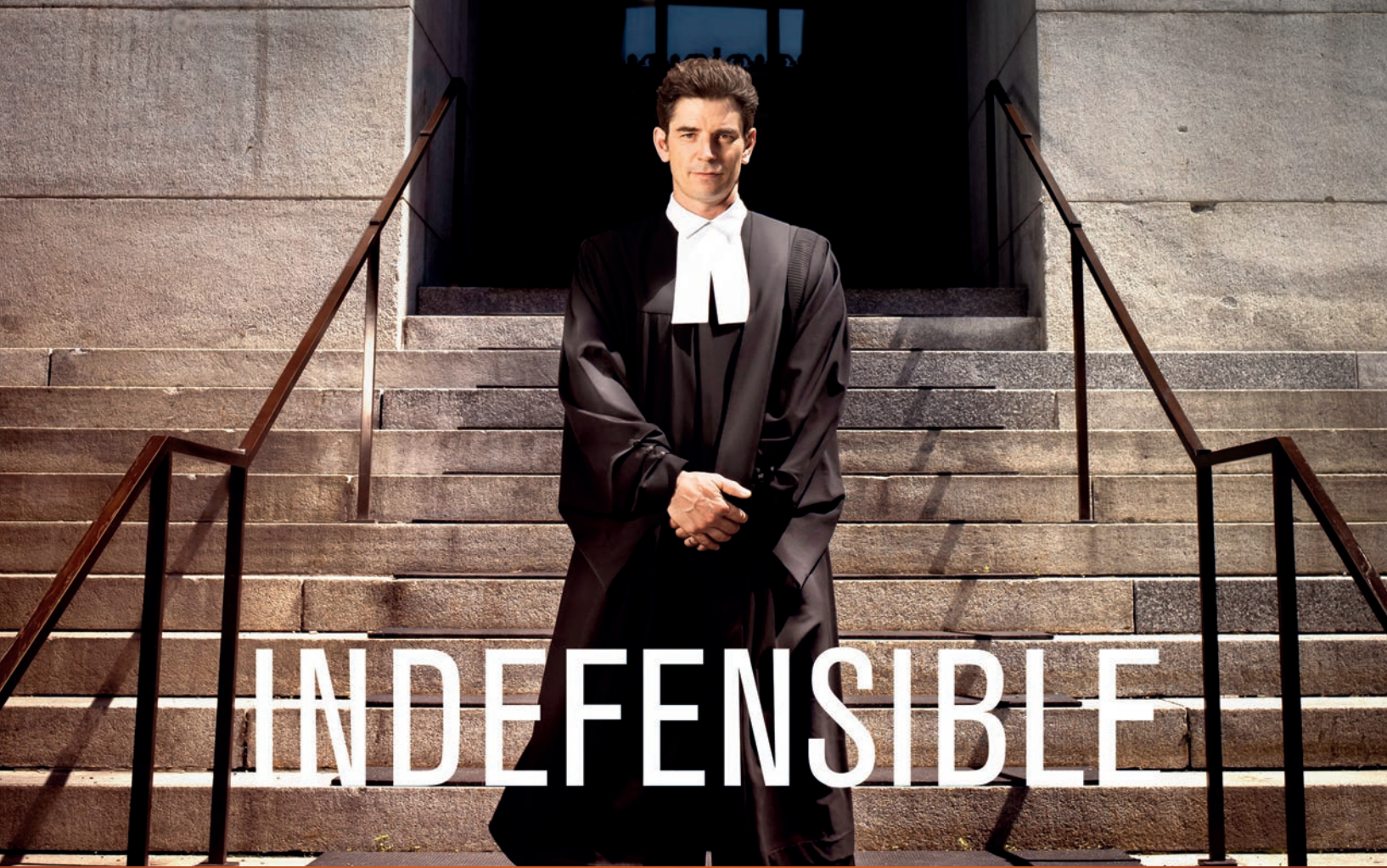
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## Creative about co-operation

Getting scripted shows off the ground has never been easy, but squeezed budgets and streamer pull-backs are making life even harder. Richard Middleton explores how one European scheme is connecting creatives, producers and broadcasters

**T**he past 18 months have been something of a turbulent time for the European scripted sector, with all manner of obstacles thrown into the paths of those looking to get shows onto screen.

Streamers such as Disney+ and Viaplay have been re-evaluating their spending on local originals, while others such as Warner Bros. Discovery's Max have pulled spending entirely from certain regions.

At the same time, commercial broadcasters have found the advertising market squeezed, causing a

consequent hit on their own spending, while public broadcasters are being asked to maintain output with declining budgets. It has made for a challenging environment for many on the creative side and posed larger questions about the types of dramas we can expect to see on our screens in the years to come.

### Why now?

Yet such circumstances can also provide the impetus for action, as evidenced by the European Writers Club

The EWC aims to create an infrastructure to help regional talent compete with global streaming services



(EWC), which launched just over a year ago. The organisation was born out of a European Union (EU) initiative – Writing European – that aimed to help nurture regional talent but also break down divisions across the continent.

TV series, the EU decided, could help to do this and so it provided funding for two pilot schemes – one of which was the EWC – that would empower creatives and assist those who control what goes on our screens.

“With EWC we aim to spark and facilitate collaboration between creators, writers, broadcasters, and producers of European TV series to boost creativity and originality in telling important and entertaining stories that transcend to a large European audience at once,” says EWC’s CEO Thomas Gammeltoft, whose previous includes heading up the Copenhagen Film Fund and being a partner at Denmark’s True Content Entertainment.

A quartet of EWC schemes have been conceived to deliver more joined-up thinking between creators, producers and commissioners. Boosting Ideas, Boosting Impact (a new session for 2023/24), Boosting Concepts, and Boosting Broadcasters (see box-outs for more) all vary in their approach but the ultimate aim of each is to leverage talent and broadcasters to create shows that are genuinely European – as opposed to generic stories produced with the global market at the forefront of mind.

“By collective and collaborative processes of sharing, exchanging, and getting inspired, EWC is all about creative empowerment and building an infrastructure that can compete with those of the global streamers,” Gammeltoft tells TBI.

“By creating a room of trust, EWC is focusing on involving the key creative partners from the very early development, to optimise the chances of realisation. We want to make our local private and public service broadcasters the most attractive go-to place for the best European talent.”

## Broadcast ready

On that front, EWC’s network of broadcast partners comes in handy, with relationships with organisations ranging from Germany’s ZDF, Denmark’s TV2 and France Télévisions, to Norway’s NRK, SVT in Sweden and RTÉ in Ireland, plus numerous others.

Simone Emmelius, ZDF’s SVP of international fiction & co-productions, tells TBI that the pan-European nature of Boosting Concepts was immediately attractive.

“It was the idea of enabling authors from different countries to write international series by supporting them with new methods of dealing with their ideas and building up a network of writers who are interested in

working trustfully together,” Emmelius says, echoing comments from SVT’s head of drama, Anna Croneman.

“There are a lot of initiatives available for emerging writers. What we liked was the idea of doing a writers programme for more experienced writers,” the SVT exec adds. One of the projects it put forward – Mona Masris’s *The Building* – was selected and has now been put into development.

Morad Koufane, head of international scripted series at France Télévisions, adds that the goal of finding projects that were “authentically and organically European” was key, but says strengthening ties with broadcast colleagues was also a boon.



And, reflecting the industry more broadly, Croneman, Koufane and Emmelius add that the scheme enables European partners to work more closely with each other at an earlier stage, a vital benefit in the current landscape.

“Most of the authors and the producers are used to dealing with domestic shows, but it’s becoming increasingly necessary to join forces especially as the younger audience is more cosmopolitan and expects international shows,” says ZDF’s Emmelius.

“High-end content is also difficult to finance without partners, and with regard to content as well as to creatives, the competition became much harder due to the various streaming platforms.”

## Creative thinking

For those on the other side of the equation, the EWC’s schemes provide another potential route to market. Gammeltoft’s organisation claims to reach more than 3,000 writers and producers across Europe, and ambitions for results are high.

One project to have emerged from Boosting Concepts is *Alpha*, created by French duo Alexandre Charlet and Louis Aubert, an “intrinsically international show” the

The initiative aims to involve key creative partners from the early development stage

## Boosting Impact

Designed to facilitate deeper collaboration between journalists, scientific researchers and the world of storytellers, the purpose of this scheme is to co-create and accelerate impactful and entertaining stories with importance and relevance for a large audience in Europe and beyond.. (To be launched at MIA Market, Oct 2023 with a session in 2024).

pair say. “We immediately saw the Boosting Concepts initiative as an excellent opportunity to bring our story face to face with an international perspective,” continues Aubert, who says the chance to spend two weeks with fellow writers and consultants, but also broadcasters from across Europe, offered unique potential.

“I’ve never experienced anything like it before,” Aubert adds, “and to get confirmation that the story can resonate outside France too was also great.”

## Boosting Ideas

Turning the seed of an idea into a fully fleshed concept across two one-week camps. 12 established European writers worked with Le Groupe Ouest, using the innovative methodology of pre-writing to develop each other’s ideas, with 10 European broadcasters offering direct feedback and collaboration opportunities.

Aubert says that Boosting Concepts also ensured *Alpha*, which has been backed by France Télévisions, was “confronted... with different points of view and cultures. Even if we’re all Europeans, we all have our own culture and our own way of thinking, and that’s very interesting to understand when you want to make a

**“It’s becoming increasingly necessary to join forces especially as the younger audience is more cosmopolitan and expects international shows”**

Simone Emmelius  
ZDF’s SVP of int’l fiction & co-productions



The EWC holds camps to spark collaboration between creators, writers, broadcasters and producers

project that appeals to a broad international audience,” he adds. “Learning from others and from their way of working was also really enriching.”

The EWC’s schemes are also seen as an important facilitator to deliver improved writing across Europe, says Aubert.

## Boosting Concepts

Six concepts and their teams of creators and producers came together to supercharge development during two one-week camps, led by TorinoFilmLab. Gathered in an eclectic writer’s room, the creators, consultant writers, producers and broadcasters united under the same goal: to boost the concept into being ready for script commissioning.

“The audiovisual landscape has changed enormously since the emergence of streaming platforms. Now we can talk to the whole world without waiting for the Americans to remake our series.

“This is a fantastic opportunity to take our European stories, ideas and point of view around the world, and we must seize it. But we have to admit that we’re lagging behind in terms of storytelling skills, compared to the Americans for example.

“That is why it is so important to create links between European writers in order to pool our strengths and know-how, so that we can create a truly European creation. Tomorrow, we won’t just be writing in our own countries and that is great news. Let’s get ready for it,” the writer says.

## Boosting Broadcasters

Featuring ten European commissioners, Boosting Broadcasters was made up of four two-day camps, which took place during Boosting Ideas and Boosting Concepts. The aim is to strengthen collaborative endeavors, while also exchanging ideas with the creators, writers and producers.

“Louis is right,” Charlet adds. “And to go further, in terms of production, we feel that our TV projects need significant financial resources to compete with US creations and that European creative actors must work together to be stronger.

“EWC is this creator of links, it is this place where there are these rooms of trust to boost projects and give them adapted and international financial support.” **TBI**







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# It's a small, small world

*Cold Courage* scribe Brendan Foley reflects on what's working and what isn't in the emerging world of scripted co-productions following a trip to the Heart Of Europe International TV Festival in Poland



**I** blame my parents. One of the first toys I can remember was an aged tin box with a handle on the side. It had once contained something that went 'boing' and popped out when the lid was flipped, but by the time I inherited it, it was just an enigmatic empty box. Luckily, when cranked by an enthusiastic three-year old, it still played wonky music. My mother told me the tune was 'It's a small, small, world.'

Maybe that's why I've spent most of my career loving working internationally across 77 countries, first as a reporter, then a features journalist, then book author, then writer-producer-director of indie co-pro features, and for the last decade as a writer-creator of multi-country TV drama. The thing that ties it all together? Storytelling for ever-changing audiences, always working with people who look, think, seem or sound a little different from me.

My most recent wanderings took me to Warsaw, Poland, partly to discuss some Polish stories in international development, but mainly to listen. I did so at the gathering of public broadcasters from all central Europe at the Heart Of Europe Forum.

It was fascinating. The public broadcasters were hosted by Polish state broadcaster TVP, in the third year of the initiative. Delegates from a dozen state broadcasters, some distributors and festival folk discussed – often with admirable honesty – the challenges they face.

Heart of Europe 2023 Pitching Forum Winners, Dagmara Brodziak and Michał Krzywicki for *Why God Doesn't Play with Time*

These included:

- Squeezed budgets at a time of economic hardship for many of their viewers, whose earnings fund the pubcasters' existence through taxes.
- The increasingly tricky tightrope of meeting audience expectations when their national audiences are often politically or culturally divided internally, as well as segmented in terms of age, gender and interests.
- The challenges of the drive to co-produce internationally while fulfilling national remits. In order to reach levels where stories will stand a better chance at international distribution, both the content and budget have to work locally as well as internationally for all the co-pro partners and audiences. This needs a very different skillset from just tailoring shows to a home market these pubcasters know inside-out.

In my corner of the business, the creative and development end of international co-pros, these regional needs sound very familiar from other parts of the world.

Working with China, for example, many of the bigger deals between US and Chinese giants in the past decade foundered, with both sides thinking that their way of structuring development or recoupment was the 'right' way, and 'big country certitude' sometimes getting in the way



of finding middle ground. Yet smaller, more tailored East-West creative alliances have often worked out well and my own experience with China with streamers and producers has been much more positive.

On the other hand, several speakers at the central European gathering singled the Nordic alliance of 12 public broadcasters (N12) as an example of how buying power and budgets could be beefed up without sacrificing national creative needs.

I have been involved in several series in the Nordic region and I have always admired the ability of people from countries from Iceland to Finland and all frosty points in between, to find subject matter and economies of scale that work for all involved. The alliance's origins lie in the more prosaic broadcaster need to get on board earlier in projects and to compete with the buying power of the streamers, but I think their success has been down to more human factors.

The partners seem to have taken the time to develop a specific shared understanding of how each could contribute and benefit, rather than rely on who had the loudest voice, sharpest elbows or sneakiest lawyers.

## Many moving parts

In western Europe on the other hand, working methods and funding models first developed in the wild west of the indie feature world, machines with many more moving parts than my childhood music box, became increasingly common in TV drama.

The task of building budget levels and finding subject matter that would work for several broadcasters and distributors together helped get many international series over the line, sometimes without turning them into a creative 'euro-pudding'.

One of the panellists at the event, Markéta Štinglová of Česká TV, generated a forest of nodding heads when she described the challenges of co-producing internationally. Česká has a longstanding collaboration with France's Arte, which has built up trust on both sides over years.

Most pubcasters in smaller countries do a great job with biopics and dramas about national heroes and figures from their past in arts, science and politics. In their homeland, all of these figures are household names, but apart from the real global giants, some of them would still draw blank stares internationally while being well known at home.

Štinglová pointed out that in choosing their subjects, they often go for someone who had a strong link to the co-pro country, maybe having lived in or worked in France, making them more accessible outside their own back yard. But that requires the need to not dumb down the character for the home audience, who often know their lives in minute detail and will switch off if they feel patronised.

She says with good co-pro partners it is always possible to strike a storytelling balance, making the local universal and aiming for shared cultural experiences – it just needs some work.

## Breaking tax burdens

Similarly, the previous 'arms race' for which country could deliver the newest, shiniest national production tax break has resulted in some location-hopping multi-country co-productions. Sometimes these made sense on paper, but saved little money in the long run when dragging talent around the world and having different crews working in different

locations with little shared overview of the project as a whole.

These were just some of the issues wrestled with at the Heart of Europe Forum. Luckily, there was very little navel-gazing and a lot of looking at how to co-operate in the future.

Typical of the presentations was Matthew Trustram of the EBU who said that the body did not want national broadcasters to work on co-productions out of some sense of duty as 'the right thing to do' but that they should seek out projects that worked both financially and culturally for all the countries co-operating, on a case by case basis. And the public broadcasters are of course just one side of the coin, with the shifting priorities of the streamers being the other.



**“The real difference between success and failure in co-pros seems to me to be more human – a willingness to put yourself in your partners shoes ...”**

Brendan Foley

While I was there for the Forum, a huge part of the event was a pitching contest in series, features and documentaries from across the region. My personal favourite was a sparky young couple of Polish actor-producers who deservedly won the feature pitch contest with the interestingly titled *Why God Doesn't Play With Time*, a near-fi drama in the vein of *Black Mirror* and a dash of *Blade Runner*, if not necessarily the budget.

Marek Solon-Lipinski, TVP's director of international relations, who hosted the Heart of Europe event, said he was delighted to see the gathering's evolution, with countries from the Baltic to the Black Sea, previously with little detailed knowledge of their professional neighbours, now developing year by year a greater understanding of related history, sometimes shared cultures, economic possibilities and changing national broadcast remits.

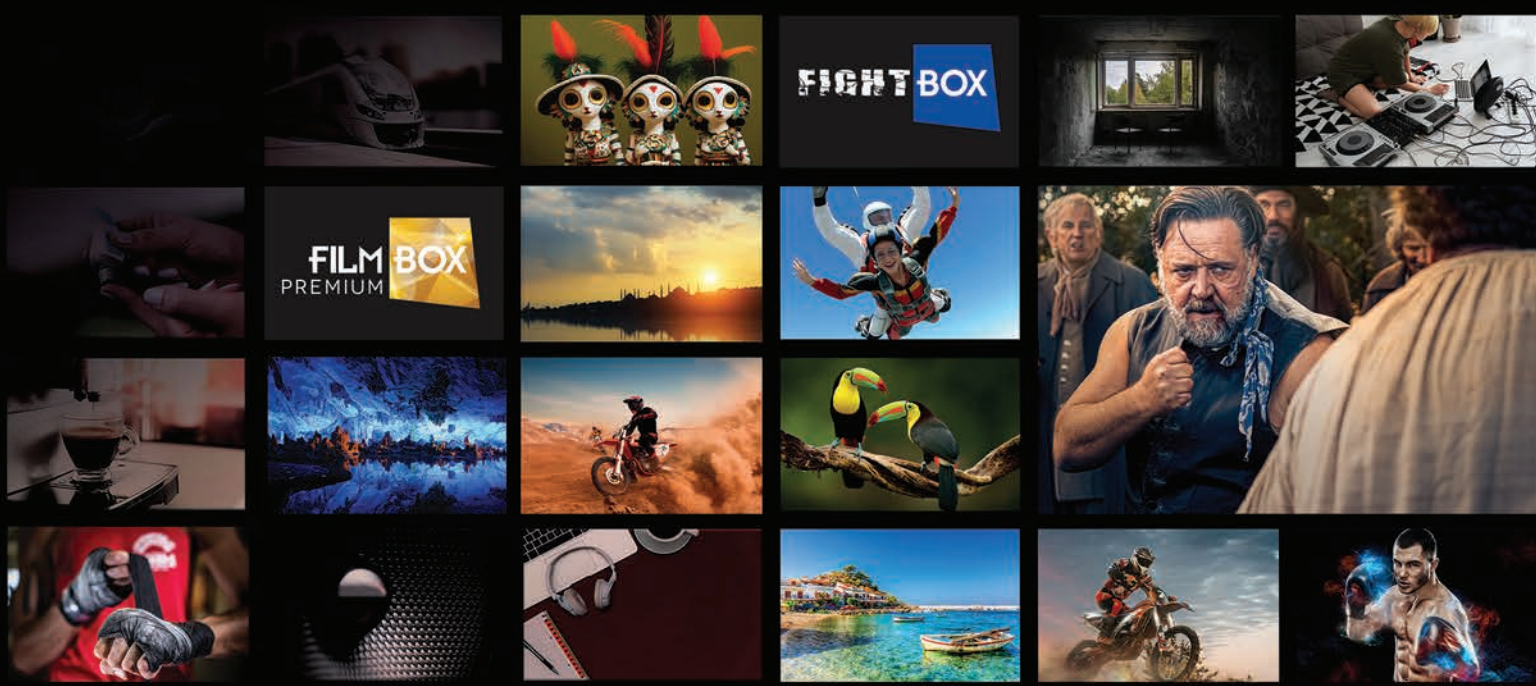
TVP plays a pivotal role not just in the event, but the region. As the biggest pubcaster in the biggest regional economy, it seems to me to operate as something of a co-pro mothership for the numerous other smaller pubcasters, many of whom were delighted to spend time comparing notes in animated 'Eurenglish' with their neighbours.

My own experience is that whatever combination of countries you end up working with, and regardless of the region of the world, some things are universal. Having complimentary rather than competing objectives, clear creative expectations and transparent division of costs and labour are always good starting points.

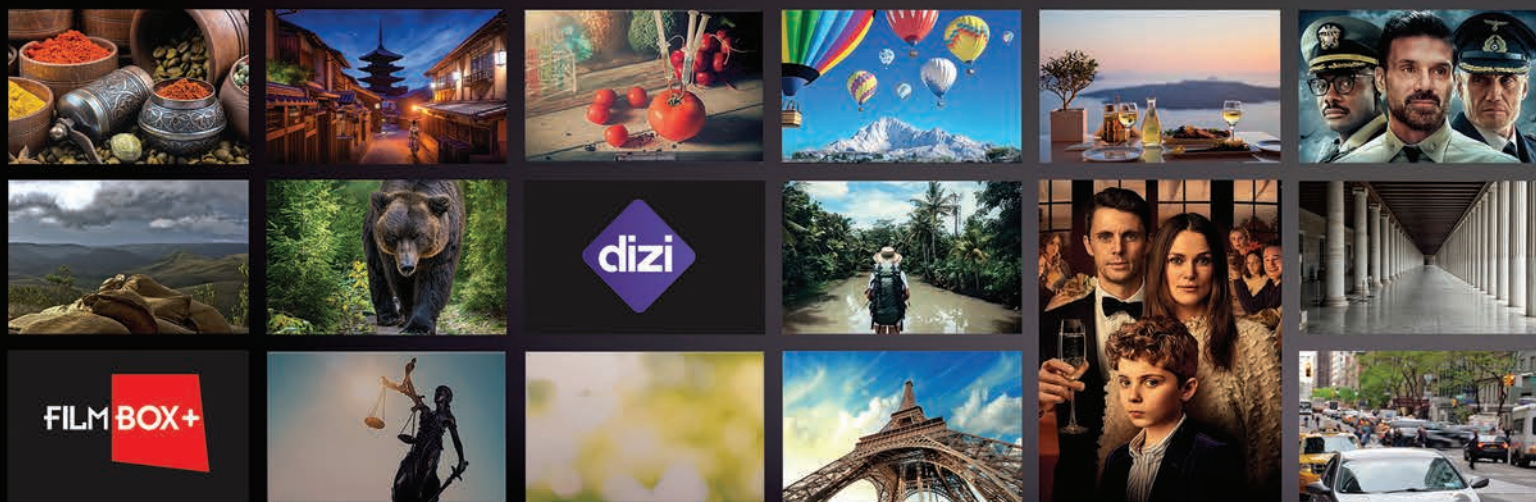
Certainly all of that needs beefy legal agreements. As Robert Frost observed: “Good fences make good neighbours”.

But the real difference between success and failure in co-pros seems to me to be more human – a willingness to put yourself in your partners' shoes, to listen, and to identify creative stories that speak to more than one audience; to build co-pro structures that deliver win-win solutions, even if no one has done it before in that exact way.

Now, if only I can find that old tin box and turn the handle, maybe it can still squeeze out one more verse of 'It's a Small, Small World'. **TBI**



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## Into the dark

Crime dramas remain an opportunity for buyers and producers despite the cooling market, writes Nick Edwards

**C**rime has always been seen as the dependable hero of the TV world, livening up linear schedules and adding intrigue to streamers' slates. But do 2023's headwinds mean the genre has finally met its match?

"Commissions are down across the board as everyone faces the current market difficulties and the same is true for crime shows," says Rodrigo Herrera Ibarquengoytia, VP of scripted acquisitions & co-productions, at Red Arrow Studios.

"But when compared directly with other genres, crime commissions remain more stable overall."

In the UK, all buyers "remain active in the space," says Richard

Tulk-Hart, co-CEO of Buccaneer Media, which was behind *Crime*, the ITVX series that was adapted from Irvin Welsh's novel.

Tulk-Hart says there is particular appetite for the genre when "it is very rooted in the UK," but adds that crime "continues to be a very strong genre," throughout Europe.

In North America too, scripted crime and thriller commissions continue to rise in popularity. According to Ampere Analysis, these genres increased between the second half of 2020 to the first half of 2023 both in terms of volume and share of overall titles – the only genre to do so. In addition to first-run titles, the number of scripted crime and thriller renewals increased nearly threefold in the first half of this year.





## Crime scene investigation

However, like the first impressions from any crime scene, such instant takeaways must be taken with a dose of scepticism.

“Budgets in the last decade have rocketed without tariffs keeping pace. Right now, they have plateaued and we expect a downward pressure on talent and crew costs which will help – and which are way overdue,” continues Tulk-Hart.

In Canada, budgets are up too. This is due to a “triangle of reasons,” says Carolyn Newman, EVP of global scripted at Blink49 Studios, who cites “inflation, side effects from post-Covid and interest rates”.

It is the public broadcasters that are currently taking the biggest narrative risks in crime drama, such as the BBC for its recent series *The Sixth Commandment*

However, “while budgets are up, the real question is are the licence fees up or down? Licence fees seem to be status quo, which makes it harder to close the gaps,” she says.

The majority of producers have now come to terms with the fact that these headwinds are a long-term challenge. “The market rates remain and won’t adjust overnight,” says Herrera Ibarquengoytia. “While the budget could be reduced with a very economical and efficient production schedule, it risks leaving no room for error and being susceptible to inflation or other external factors.”

With audience expectations so high and the market so competitive, cutting production values is not an option. “We don’t do cuts that impact quality,” says Tulk-Hart, “we just find original ways of getting the same or better results in a pressurised environment.”

“Viewers expect a certain quality, so you can’t simply cut production budgets,” says Marcus Ammon, MD of content at Germany’s Bavaria Fiction. “Finding smart, time and cost-efficient production concepts is the key.”

And there is no magic money tree, so how will outlets and platforms strategise in these straightened circumstances? Herrera Ibarquengoytia suggests a likely outcome: “A trend of decreasing budgets is more likely to be determined by the projects being developed and commissioned; more grounded concepts that inherently require less ambitious budgets.”

## Plotting & planning

With the amount of money producers have upfront declining, Hana Palmer, head of sales at Abacus Media Rights, says her company is “part-funding or arranging pre-sales” and “pulling together different parties for more and more projects in order to get them off the ground.”

The upheaval in the industry has also sparked a reversal in what linear channels and streamers traditionally make.

“There has always been a huge demand for crime. We are now seeing that trend with the streamers as they tend to commission less high end and less edgy programming and seem to be focusing on more mainstream genres. Cost efficient production and the necessity to grow their subscription base with local product has become more important,” says Ammon.

“In some ways, public service broadcasters seem like the ones taking risks successfully: shows such as SVT’s *Blackwater* in Sweden or Wild Mercury and the BBC’s *The Sixth Commandment* are examples of huge successes for shows that are a slow burn, intelligent, intense and very, very dark,” says Banijay’s Steve Matthews.

Formats are reflecting the changes too. “We are indeed seeing a trend for shorter, limited series with capped episodes for public broadcasters,” says Ammon. “At the same time, the demand for long-running, weekly linear self-contained shows is declining.”

“One-offs and minis are tricky to finance but there are green shoots with the likes of ITVX, which is able to do things they couldn’t when it was only a linear space,” explains Tulk-Hart.

“Experimenting in our industry is where exciting shows get made. We need to get back to a space where making mistakes in commissioning is OK.”

## Repeat offenders

For crime shows in the current environment, conceiving of series that have self-contained season story arcs but which retain the potential to return for further seasons make for a compelling pitch.

“In *The Gone* finale, the case is closed, giving the season a satisfying end and delivering a complete, self-contained series. But nevertheless, it also provides a cliffhanger allowing for ways to reopen the story and expand creatively with subsequent seasons,” says Herrera Ibarquengoytia.

Also worth noting is how *The Gone* came about: the show is an Irish-New Zealand co-production, produced by Kingfisher Films & Keeper Pictures in association with Southern Light Films for TVNZ and RTÉ.

Co-pros such as this provide financing for ambitious shows in crime, or indeed any genre. “They are in many ways essential, it’s either that or a co-commission in a certain budget range,” says Tulk-Hart, who adds that in terms of potential partnerships, “Australia and Italy are interesting.”



**“Budgets are up but licence fees seem to be the status quo, which makes it harder to close gaps”**

Carolyn Newman, Blink49 Studios

The uncertain times we live in are also reflected in audience tastes and there is an appetite for feel-good shows and procedurals. “What’s old is new again,” says Newman, pointing to Blink49’s *Wild Cards*, a procedural with a comedic twist.

“It’s a lean-back crime series with comedy sprinkled in that has a feeling of nostalgia, connection and easy watching,” she says. *Wild Cards* was created by Michael Konyves as the world emerged from the pandemic. “He wanted to create a light-hearted show that would make viewers smile and laugh so he pulled from inspiration that is familiar and nostalgic,” says Newman.

“The perceived wisdom is that if the world feels miserable, people like happy colourful shows that will cheer them up,” says Matthews. However, “people enjoy facing the darkness despite, or perhaps because of, the state of the world,” he says.

## ‘Emotional catharsis’

“There is still a need for emotional catharsis,” says Newman. In *Sight Unseen*, also from Blink49, “the lead character is faced with a life altering condition, yet she is still able to keep a sense of herself and overcome obstacles to live a life of what she sees as her purpose,” she



*The Gone*, for TVNZ and RTÉ, has a self-contained story arc but leaves the door open with a cliffhanger to continue the show in subsequent seasons

says of the show, which is spearheaded by Karen Troubetzkoy (who has experienced sight issues first-hand) and sister Nikolijne.

“We find that there is demand for light, procedural crime such as *Hope Street* (we have S3 coming soon), it works for broadcasters in peak slots especially when there is high volume. And, also, for the more edgy, noir type series such as our new *Catch Me A Killer* and *Scrublands*,” says Palmer.

Crime’s ability to explore any theme means that what is often seen as a staid genre, that appeals to older people, can actually prove popular with younger audiences too. “Our young adult horror series *Lost In Fear* shows the causes and aftermath of a school rampage, and launches soon on ZDFneo,” says Ammon.

A new addition to Red Arrow’s catalogue is the Australian short-form series *Appetite*, produced by Fell Swoop Productions and Photoplay for SBS. “The series follows three penniless food delivery riders brought together after their housemate mysteriously vanishes. The series’ satirical tone allows it to explore heavier social issues and shows the other side of convenience culture. Its fast pace and format makes the crime genre more accessible to a younger audience,” says Herrera Ibarquengoytia.

Demand for scripted crime shows has grown but there are more questions around true crime’s surging popularity on the factual side – Ampere data has reported a notable move away from this genre of non-scripted. This reflects the fact that commissioners feel they have potentially reached near saturation point with younger audiences and now want to appeal to older audiences – and they are investing in the kind of high-quality scripted shows they are fond of.

The US strikes have also created a potential window for more acquisitions from the rest of the world, but as Herrera Ibarquengoytia points out, “most broadcasters had an overflow of content and are therefore well placed to fill sudden gaps. The full effects of the strikes won’t be felt until late 2023 and into 2024, where demand for foreign content might rise.”

Like any good crime fighting hero, the crime genre remains as tenacious as ever, adapting to new market conditions as they arise. “Crime is still king and will continue to be,” says Ammon. **TBI**



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## Script to Screen: Lost Boys And Fairies

*Lost Boys And Fairies* is set to become UK broadcaster BBC One's first primetime bilingual English/Welsh drama. Creator Daf James tells Nick Edwards how the show made it to the screen

**W**ales is one of the rare countries that has not only remained largely immune to the tumult that has taken place across the global scripted sector but is actually thriving like never before, and *Lost Boys And Fairies*, from creator Daf James, may prove to be jewel in its crown.

### Act One: Genesis

The series follows singer and artiste extraordinaire Gabriel, who is immersed in Cardiff's queer culture scene, and his partner Andy, as

they adopt their first child. Gabriel's journey of self-discovery means he must try to repair his relationship with his father before he can be a good parent to his seven-year-old, Jake.

"I wanted to tell this story because I hadn't seen adoption represented authentically on screen, nor my queer, Welsh experience on primetime television before," says James. He wrote his first play because "I hadn't seen myself, or my own experience reflected in drama before." Now he wants to apply this to TV.

"When I was a kid, TV was a magic box. It was so powerful. It hasn't lost any of that power and magic for me."

After Daf's first theatre play, *Llwyth*, he was asked to write on





the school-based Welsh language TV show *Gwaith/Cartref (Home/Work)*, created by Roger Williams. “It was a brilliant environment to start learning my screenwriting craft. The tone of the show suited me: an ensemble drama, with great characters and a satisfying balance of humour with emotion.” He wrote on that series for four years.

*Lost Boys And Fairies*, however, marks James’ first original screenplay for the BBC (BBC Cymru Wales and BBC Drama) and the first production from Leeds-based indie Duck Soup Films, which was backed by the C4 Growth Fund in April 2021. It is also BBC One’s first primetime bilingual English/Welsh drama.

“We found Daf through the BBC Writers Room scheme,” says

Fra Fee and Sion Daniel Young star as Andy and Gabriel, respectively, a gay Cardiff couple on the path of fatherhood after they adopt their first child

Jessica Brown Meek, co-founder of Duck Soup Films. “As soon as we read his pilot for *Lost Boys And Fairies* we knew both he and it were special,” she says. The creative commissioners within the BBC felt the same way.

“The script went very quickly right to the top,” Brown says, with full financing achieved when All3Media International (with whom Duck Soup has a first-look deal) came on board, shortly followed by Creative Wales.

For Maartje Horchner, EVP of content at the distribution firm, the collab was a no-brainer. “The script absolutely blew us away. We laughed and cried out loud, even in our open office.”

## Act Two: Production

The scripts were developed across a 12-month period during Covid. “We would have our script meetings over Zoom,” says James. “We all went through so many things personally during that time, that we became very close. I need these types of relationships to enable me to go to these places in my writing. It’s not just a case of script-editing and feedback; it’s a case of creating an environment within which I could courageously speak my truth,” he explains.

Like their Welsh colleagues, being outside of London means Duck Soup are highly attuned to representing the authenticity of a place – perhaps, a result of many years of seeing their own home town barely represented on screen and when done so, from a London perspective. Yet clearly being based outside of Wales was something the Leeds-based production company had to address, which it did partly with the help of Welsh producer Adam Knopf and the establishment of a local team.



**“When I was a kid, TV was a magic box. It was so powerful. It hasn’t lost any of that power and magic for me”**

Daf James

“The wealth of local talent in Wales has shone bright,” says Brown. “Across the board, we have been blessed with a hardworking, friendly and passionate crew from heads of department all the way through to work experience.” Duck Soup Cardiff (part funded by the BBC, with whom the company also has a first-look deal) has now been set up to establish a slate of films and TV projects with Welsh talent that will be produced in Wales.

Casting was no mean feat. A world-class Welsh-speaking performer (from a specific cultural background) who could deliver humour, plummet emotional depths, and who could also sing (music is an integral part of the show and James is also musical director) was required to play the lead Gabriel.



Maria Doyle Kennedy (top) and Sharon D. Clarke (above) also star in the series, which explores themes such as “love for your chosen family”

So, for this role they turned to Sion Daniel Young, who went to the same Welsh-language school as James, comes from the same cultural community, and his first acting gig was in *Llwyth*, James’ debut stage production.

“He played an innocent Welsh-speaking gay teenager in that drama. That too was a very personal play. There’s a beautiful poetry in that. The cyclical nature of things.” Members of the local queer community had roles as supporting artists (particularly playing club goers at ‘Neverland’ where much of the action takes place).

Direction, meanwhile, was entrusted to James Kent (*MotherFatherSon*, *The White Queen*) “whose body of work speaks for itself,” says Brown.

### Act Three : Impact

Clearly, *Lost Boys And Fairies*’ themes of queer culture and parenting are ground-breaking and ambitious, especially for a primetime BBC One drama. “I’ve always been interested in the tension between queerness and the mainstream and how you might craft a story with minority perspectives for as wide an audience as possible,” says James. “What’s been so brilliant about working with Duck Soup and the BBC is I haven’t had to compromise my vision. I’ve been encouraged to tell my story authentically.”

However, what may be a valuable unique selling point in some markets may make it a more challenging proposition in others (particularly in more traditional or conservative cultures).



“In certain areas of the world it will always be difficult to sell programming with certain themes,” says Horchner. “Although to me, the themes are very broad about love and acceptance. Loving someone for who they are regardless of what the world thinks. Fighting for something you truly believe in and sharing that love with someone who desperately needs it. Love for your chosen family (in this case the queer community) and love for family no matter how complex that love is. It seems to me there is so much in this anyone can identify with.”

Universal themes such as these are the perennial qualities of successful TV drama historically. Horchner points to *It’s A Sin*, which her company also represented, as an example of a ground-breaking drama that became one of the most successful shows in recent years.

The realisation of this project has been so close to James’ original vision that working on it has been “like walking through my dreams,” he says.

Hopefully, it will fulfil his social ambitions too: “This story also really matters to me because I’m a huge advocate for adoption. Adopting has been one of the most rewarding (and challenging) things I’ve done. In Wales alone, there are currently hundreds of kids waiting to be adopted. Adopting changed me profoundly as a human and as an artist. I see the world differently now, through my children’s eyes. Their stories are now part of my story too.” **TBI**



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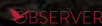


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# Age of Temptations

# Sairyland

CAST: PÉTER DÁNIEL KATONA, BARNA BOKOR, FERENC PATÁKI, ABIGÉL SZÓKE, ZSÓFIA SZAMOSI, ATTILA PÁL D., ZOLTÁN RAJKAI, KATA GÁSPÁR, MÓNI BALSÁI, EVELIN DOBOS, LEVENTE DIMÉNY, ZSÓLT ZAYZON, NÓRI PARTI, PÉTER KÁLLÓY MOLNÁR, DÁNIEL LUKÁCS  
PRODUCED BY: BALÁZS ENDRŐDY  
WRITERS: NÓRA ZELENKA, REKA PINTÉR, GEZA SZÜLLÖSI, FERENC IFJ. BALOGH, LÁSZLÓ RUMBOLD  
DIRECTOR OF PHOTOGRAPHY: GÁBOR GARAI HCA  
EDITORS: ANDRÁS DEZSŐ HORVÁTH, VIKTÓRIA JELI  
EXECUTIVE PRODUCERS: GEZA BEREMÉNYI, ISTVÁN TASNÁDI  
PRODUCED BY: ISTI MADARÁSZ  
PRODUCED BY: DOROTTYA HELMECZY, GÁBOR KÁLOMISTA



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Top  
Pick







## Scripted Hot Picks

From supernatural thrillers and dark comedy to adult animation, here's our selection of the best scripted titles making their way to market right now

### Scrublands

**Producer:** Easy Tiger

**Distributor:** Abacus Media Rights

**Broadcaster:** Stan, Nine Network (Australia)

**B**ased upon Australian author Chris Hammer's debut novel of the same name, *Scrublands* is set in Riversend, an isolated country town in New South Wales, where a charismatic and dedicated young priest (Jay Ryan) calmly opens fire on his congregation, killing five parishioners.

One year later, investigative journalist Martin Scarsden (Luke Arnold) arrives in Riversend to write what should be a simple feature story on the anniversary of the tragedy. But when Scarsden's instincts kick in and he digs beneath the surface, the previously accepted narrative begins to fall apart, and he finds himself in a life and death race to uncover the truth.

"Each episode of *Scrublands* starts with the shattering events of the year earlier, revealing it from a different character's perspective," reveals Hana Palmer, head of sales at Abacus Media Rights, to TBI. "Returning to this moment in different ways mirrors Martin's journey as he struggles to uncover what brought this charismatic young priest to make this

terrible decision, while also mirroring the experience of the townsfolk, unable to move on from this shattering moment."

The 4 x 60-minute crime drama series is directed by Greg McLean, written by Felicity Packard, Kelsey Munro and Jock Serong, and produced by Ian Collie, Rob Gibson, David Redman and Felicity Packard.

Its cast also includes Zane Ciarma, Adam Zwar, Victoria Thaine, Robert Taylor, Stacy Clausen, Genevieve Morris and newcomer Ella Ferris.

"We were aware of the producer's work, which was very successful and established," says Palmer of Easy Tiger's Ian Collie and Rob Gibson, who worked on *Colin From Accounts* and *The Twelve*. "We had early visibility of *Scrublands* and liked the adaptation and scripts, so we made an early commitment when they were close to getting greenlight with Stan."

Even though *Scrublands* is a closed-ended story, Palmer adds that the show is designed to be a returning series with Scarsden at the centre of events, opening the door for future instalments.



## Black Daisies

This Polish supernatural thriller is inspired by the mysterious disappearance of several cult members in the Silesia region before the outbreak of the Second World War.

Combining emotional drama with otherworldly mystery elements, the 8 x 60-minute series follows Lena, a geologist, who faces her worst fear when her estranged teenage daughter vanishes alongside a group of kindergarten children in her care.

Returning to her hometown of Wałbrzych, Lena partners with Rafal, a childhood friend and policeman, and together, they uncover a chilling link to a local businesswoman with a dark facade of philanthropy that leads them to navigate an eerie underworld of abandoned tunnels.

"[Silesia] was a scientific research center for the Third Reich and, during the war, huge underground tunnels were built, with mines transformed into huge shelters. Until today, the mystery remains - what was the purpose of the massive underground buildings in Wałbrzych?"

"We wanted to place a human story in the midst of this interesting arena, with a dual time frame," reveals Beata Ryczkowska, director of original productions and co-productions at Canal+ Poland.

"And so we have the story of Lena, a geologist, who investigates the disappearances of her daughter, during

which she discovers the war secrets of Lower Silesia and gradually comes into contact with the parallel reality of underground lakes, mysterious creatures and her own repressed memories."

Karolina Kominek, Dawid Ogrodnik and Edyta Olszówka, head the cast of the series, which is directed by Mariusz Palej (*The Black Mill*).

"The narrative, full of expressive characters, is interspersed with the dream visions of the main character - Lena. They not only play an important part in solving the mystery of the abducted children but are a story in itself about the happenings and horrors that women experienced after the end of the war," Ryczkowska tells TBI.

Beatriz Campos, SVP of global sales & production financing at StudioCanal, adds that the series "offers an original narrative with fascinating characters and astonishing twists". She believes it will appeal to international broadcasters "as a ready-made drama" and also with "huge potential for scripted adaptation in other countries."

**Producer:** Balapolis

**Distributor:** StudioCanal

**Broadcaster:** Canal+ Poland (Poland)



# Obituary

Siobhán Cullen heads the cast of this 6 x 60-minute Irish dark comedy crime drama, which follows 24-year-old Elvira Clancy, who is feeling unfulfilled, although she adores her job writing obituaries.

When her newspaper falls on hard times, her boss tells her he is unable to keep her on the payroll and she finds herself being paid per obituary overnight. When she ‘accidentally’ kills a nasty piece of work in the town, she discovers she might have an untapped bloodlust.

She relishes using ever more crafty methods to kill off the town’s unpleasant residents while making them look like accidents. Unfortunately, a wrench lands in the works - the paper hires a suspicious new crime correspondent with a penchant for conspiracy theories, and she really, really likes him.

“Hailing from a small Irish town, I realised that my TV show should be set within the confines of a modest local newspaper, with the central character being an obituary writer, but I had to create a character that

**Producer:** APC Studios & Magamedia

**Distributor:** APC

**Broadcaster:** Hulu (US) & RTÉ (Ireland)

resonated with my darker personality and narrative voice,” reveals show creator Ray Lawlor.

For the character of Elvira, the writer says that the job of an obituary writer “caught my attention – it seemed unusual and fresh. With this twisted concept, the show found its engine.”

Laurent Boissel, executive producer for APC Studios, meanwhile, describes *Obituary* as “a unique genre fusion” that combines elements of dark comedy, crime, and drama to create “an unconventional genre blend.”

He adds: “The show is a combination of both episodic and serialised TV. We always have a ‘kill of the week,’ which feels like a standalone story, while in the background, the serialised elements provide the first series with a strong narrative drive.”





## Grimsburg

Coming straight out of the gate with an early season two renewal, this new adult animation stars and is executive produced by *Mad Men* actor Jon Hamm.

He voices Marv Flute, who may be the greatest detective ever to catch a cannibal clown and correctly identify a mid-century modern armoire.

However, there's one mystery he still can't crack – himself. To do that he must return to Grimsburg, a town where everyone has a secret or three, and redeem himself in the eyes of his fellow detectives, his ferocious ex-wife and his lovably unstable son.

“*Grimsburg* originated as spec script written by two film school professors at Loyola Marymount University here in Los Angeles. It was sent to us by executive producer Gail Berman. The premise was a true-crime comedy set against a Nordic noir backdrop – two things you normally don't associate with animation,” reveals Michael Thorn, president of scripted programming at Fox Entertainment.

“The script was very funny and its heightened

animated setting is something that fits right into our brand. Think *Twin Peaks* meets *Lilyhammer* meets Animation Domination.

“We brought in Chadd Gindin, whose credits include *The Cleveland Show* and *It's Always Sunny In Philadelphia*, to evolve the series and show run. But it wasn't until Jon Hamm came on board to voice Marv Flute when it all came together. His performance is so hilarious and adds the additional layers of neurosis that makes this character so special.”

Thorn explains that the writers use crime, mystery and horror to satirise pop culture, politics and the world around us. The array of bizarre crimes that Flute faces are ripped from the real world, but with a twisted, comedic re-interpretation.

**Producer:** Bento Box Entertainment

**Distributor:** Fox Entertainment Global

**Broadcaster:** Fox (US)



# The Greatest Teacher



This suspenseful one-hour drama follows the story of a teacher, who is pushed off the school balcony after a graduation ceremony. The last thing she sees is the sleeve of someone's uniform, but the next minute she suddenly finds herself rebooted back one year in time to her homeroom class on the first day of school.

With 30 suspects and only a fleeting glimpse of a uniform sleeve, the time-travelling teacher embarks on a relentless journey to unveil the truth.

Based on Nippon's own 2019 series *Mr. Hiragii's Homeroom*, this new, updated spin is being launched to market as both a show and a format, with global audiences in mind.

"We were inspired to create a new series featuring the reality of school life but from a very different, modern, dramatic angle. This series is also in line with our storytelling style of depicting what's happening now in the real world through mystery

**Producer:** Nippon TV

**Distributor:** Nippon TV

**Broadcaster:** Nippon TV (Japan)

and emotional stories to keep viewers engaged," says Yuki Akehi, director of global business at Nippon TV.

"The most important change that the teacher makes on the second round of her life is an absolute resolution to make a difference this time. If not, not only will the students not change, but she will be dead again," reveals Akehi.

She adds that, aside from the mystery elements, the show also tackles social issues with "an innovative and exhilarating approach, sure to inspire global production companies to create their own version based on this format." **TBI**



## Going off script in Asia

Netflix's recent ramping up of its unscripted slate in Asia has illuminated the enormous potential across APAC, with commissions increasing and more quality content coming onto the market than ever, writes Marco Ferrarese

**I**n August, Netflix unveiled its largest unscripted content initiative in Asia Pacific (APAC), underlining a shifting emphasis for the global streamer. With a regional HQ in Singapore and offices in Seoul, Tokyo and Mumbai, APAC is seen as offering growth potential for Netflix and most of the 11 original titles – hailing from Japan, South Korea and India – are unscripted in nature. The first two, India's true crime docuseries *The Hunt For Veerappan* and South Korean reality show *Zombieverse*, were released a couple of months ago.

Netflix's latest move follows regional trends: in 2022, 75% of its APAC subscribers watched unscripted or factual content (non-fiction or unscripted scenarios, entertainment and documentaries). Even if it remains the service's smallest regional market overall with 39.5

million subscribers (according to US business magazine Fortune), over the previous five quarters, APAC alone added 64% (6.9 million) new Netflix subscribers - and they enjoy watching factual content.

*The Hunt For Veerappan* is an intriguing example of what is being sought, with the English-language docuseries tracking a dreaded smuggler whose bloody reign sparks a 20-year-long manhunt in south India. It became Netflix's top show in the country two weeks after its roll-out in early August.

### Under the radar

Netflix's new focus on producing factual-focused APAC content is also in line with its late 2022 decision to start producing a slate of fictional films and series from South

*Zombieverse* was one of the first titles to emerge from Netflix's recent APAC push



East Asia (Indonesia and Thailand in particular). But its unscripted focus is not unique. Under the radar of mainstream TV, other APAC-based companies have laid the groundwork for this type of content for years.

One regional pioneer was Hong Kong-based Asia Pacific Vision (APV). Founded in 1991 by British reporter Mark Erder and American documentary filmmaker Adrian Brown, it specialised in addressing the then-large coverage gap about this part of the world. Clients included CNN, BBC, Sky, Fox News and Australian broadcasters TCN9 (Nine), Seven Network and Network 10. Today, APV still delivers docs to National Geographic but mostly produces branded content for major corporations like HSBC.

Another landmark company is Blue Ant Media-owned Beach House Pictures, one of APAC's largest independent TV and film production companies, also headquartered in the region's business powerhouse of Singapore, with a base in China and partners across South East Asia, Japan, Korea and India.

"We are currently producing quite a few projects – both scripted and factual – across true crime, drama, science, natural history, survival and lifestyle for not only local but also global and regional platforms," Jocelyn Little, Beach House MD, tells TBI. Clients range from regional operators to international streamers such as Netflix, Amazon Prime and Warner Bros. Discovery.

"With streamers tightening their belts, they are being more selective, but there is still a hunger for great content," she adds.

## What the streamers want

Little believes that to remain relevant in APAC, one has to deliver on both 'must have' ideas and come up with more innovative financing solutions. "Our target markets range from key Asian territories to the US, so we are always talking to filmmakers, studios and IP holders from within and outside of APAC to collaborate with," she says.

"We are looking for great stories that speak to us and speak to our brand of storytelling. But more importantly, we are looking for absolutely unique access or talent to package the best 'must-have' documentaries or factual entertainment shows."

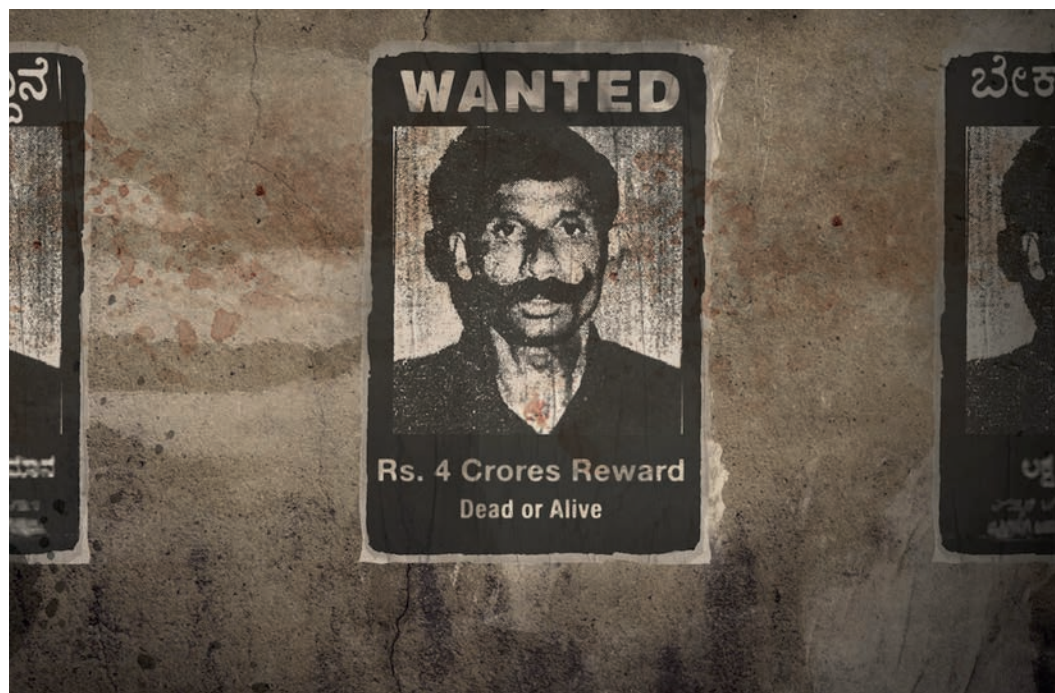
Despite the growing interest in unscripted content across APAC, streamers still "lead with scripted content, but do tend to expand their originals with non-scripted, factual, lifestyle titles," says Sabrina Duguet, EVP of Asia Pacific at the Singapore office of All3Media International.

According to Duguet, "as the production budgets in the region keep growing, the production of such titles is reaching wider audiences, international buyers and getting international recognitions with shows such as *The Elephant Whisperers*."

Released in 2022 on Netflix, this Indian documentary from Kartiki Gonsalves and produced by Mumbai-based Sikhya Entertainment, tells the story of a South Indian couple who devote their lives to caring for an orphaned baby elephant named Raghu. It was the first Indian documentary to win an Oscar for Best Documentary Short Film.

**"We strive to train creators to tell stories from a human perspective, for [more] emotional and personal appeal"**

Sheril A. Bustaman,  
producer & lecturer



*The Hunt For Veerappan* became Netflix's biggest show in India just two weeks after its release in August

Duguet is also seeing “a strong interest in true crime and travel-focused lifestyle content. And we’ve had several series produced in Asia about Asia for local and international broadcasters. For example, Nine Network’s *Travel Guides* strand from Australia, a hit adaptation of Studio Lambert’s travel format, was filmed in Vietnam, Sri Lanka, Taiwan, and Tokyo, amongst others.”

There are also new avenues being explored, with Beach House in production on an IMAX feature-length documentary called *The Elephant Odyssey*, which chronicles the adventure of the wandering Asian herd that in 2020 left their usual habitat to trek over 1,000 km across China’s remote southwestern Yunnan province.

“We have several returnable docuseries in production for local, regional and international platforms in the natural history, crime, lifestyle, and travel & adventure genres that will be announced soon too,” says Little.

Big-name shows are also starting to arrive in the region, paving the way for more international cooperation and sales. “This year is the first time All3Media International is distributing *The Earthshot Prize*, the ambitious global initiative to protect and restore our planet founded by Prince William,” adds Duguet. The series is produced by Studio Silverback, which was launched in 2021 by All3Media-owned Silverback Films, with the APAC show being shot in Singapore this year.

**“We are seeing a strong interest in true crime and travel-focused lifestyle content”**

Sabrina Duguet,  
All3Media International



*The Elephant Whisperers* (below) follows the story of orphaned elephant Raghu, while *Come And See* (bottom) explores controversy at the Thai Buddhist temple Dhammakaya



**Hyper-localisation boon**

Yet while unscripted commissions are growing across the vast and varied APAC region, the intrinsic differences between markets are a potentially limiting factor.

In APAC, “the commissioners are still mainly scripted and hyper-localised for each key market,” says Little. In other words, different countries across the region produce lots of factual content but with stories loaded with complex cultural nuances and specific backgrounds that may not be immediately palatable to the average international viewer.

One example was *Come And See*, a feature-length 2019 documentary produced by Thai non-fiction film production company underDOC. Released in 2021 on Netflix, it’s a deep dive into the controversial world of the Thai Buddhist temple Dhammakaya, whose abbot was charged with money laundering, and Thailand’s unique relations between politics and religion.

Hyper-localisation, however, is not necessarily a bad thing, as it ensures unique stories that can also make an impact beyond mere viewership numbers. One example is found by looking deep into the underbelly of Malaysia’s factual content production, where Kuala Lumpur’s independent documentary production company Fat Bidin collaborated with the South East Asia Regional Centre for Counter-Terrorism (SEARCCT) on a unique series of three documentaries that raised awareness on the violent religious extremism that continues to nest among some Muslim populations in South East Asia.

The first, *Perempuan Radikal (Radical Woman, 2021)*, documents the confessions of Wardah, the former wife of a Malaysian man with ties to the terrorist Islamic State (IS), from the perspective of the unknowing victim who has her life turned upside down because of her husband’s ill-fated decisions.

The series also includes *Oretulo* by Hadi Azmi, which examines the long-standing separatist insurgency across Pattani (an Islamic Southern province of Thailand) and Kelantan state in northeastern Peninsular Malaysia. These documentaries aired on the Malaysian national pay television news channel Astro Awani and visited Malaysian public universities.

“I don’t think these [hyper-local] topics are sidelined, just presented in a very methodical or statistical manner that makes them impersonal to the public,” says Sheril A. Bustaman, the producer of *Perempuan Radikal* and a documentary-making trainer.

“That’s why we strive to train creators to tell stories from a human perspective, for [more] emotional and personal appeal,” she says. The result could be to sow the seeds for a new generation of filmmakers who might push APAC’s unscripted talent to new heights. **TBI**



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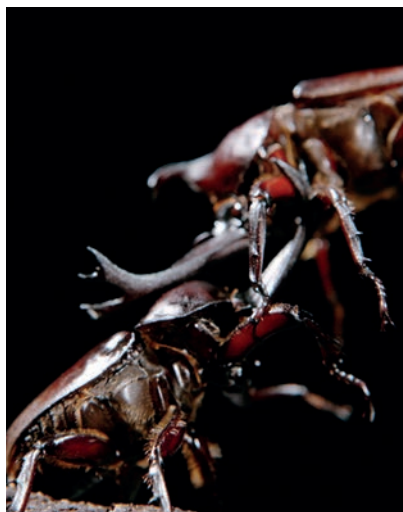
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# Time for action



Sports docs have mushroomed over recent years, so why isn't the explosion of interest in women's sports being reflected on screen, asks Helen Dugdale

**T**his summer's FIFA World Cup in Australia set the broadcast media ablaze with stories of female sports teams and individuals excelling in the world of football. But should it take a major international sporting event to give women's sports the recognition and airtime they deserve?

Rebecca Sowden, former New Zealand Football Fern player and women's sport sponsorship marketing consultant, believes that broadcasters and streamers should be doing a lot more.

"While we have seen coverage improve generally in the past few years in various regions and at times when there are pinnacle events like the FIFA Women's World

Cup, it's still only a fraction of what we see covered with men's sport.

"Yes, we have seen huge impact and interest around the World Cup, but this level of coverage and interest isn't the norm in New Zealand and Australia on a day-to-day basis," she says.

## New rules

UK-based author and documentary maker Sue Anstiss took it into her own hands to make *Game On – The Unstoppable Rise Of Women's Sport*, a film that explores the growth in women's sports and its impact across society.

Having written a best-selling book of the same name, Anstiss wanted to reach a wider audience with her stories and took the treatment for the 60-minute documentary round to broadcasters and streamers looking for UK distribution.

"I made *Game On* partly because there was nothing

Stacey Copeland in *Game On – The Unstoppable Rise Of Women's Sport*, which was self-funded and sold to Netflix





else out there in the sports space on the slate. Initially, the people we talked to loved the idea but said no in terms of commissioning. So, we self-funded it and then went back and got a great response, but decided to go with Netflix as we made the documentary with them in mind. I knew the power of the platform and their positioning around sport would allow us to reach and influence audiences,” she says.

Directed and produced by Anstiss and Jack Tompkins, *Game On* features interviews with some of the world’s most successful sports stars, such as boxing champion Stacey Copeland, alongside key sporting moments from 2022, including the UEFA European Women’s Championships, the Rugby World Cup and Katie Taylor and Amanda Serrano’s headline fight in Madison Square Gardens.

“*Game On* has resonated strongly, especially with people who work in sport. It has touched the audience I’d hoped it might reach – men, partners, dads, and brothers,” reveals Anstiss.

**“I would encourage commissioners to be open-minded because the future is going to be about women’s sports”**

Sue Anstiss, author & documentary maker



## Human interest

Liz Tang, distributor, and executive director of acquisitions at Fifth Season, believes that documentaries and docuseries are the ideal format for telling stories from the world of sport.

She is part of the team responsible for distributing two well-received feature docs about women in sports. *The Wall: Climb For Gold* (pictured above) is a feature documentary that follows four female climbers as they attempt to compete in their first Olympic climbing competition at the Tokyo Olympics in 2020.

In *My Name Is Ada*, Norwegian football player Ada Hegerberg, the first-ever female winner of the Ballon d’Or trophy, tells the story of how she quit her national team and missed the World Cup, to empower women and change the power dynamic between men’s and women’s football.

“These two features stood out because of their premium nature and international appeal,” she says.



“It’s not just about the sports piece, it’s about the human-interest story behind it. *The Wall* brought climbing to the masses and showed that it should be on the world stage.

“Sport is still one of the remaining must-have content for all broadcasters and all streamers across all platforms. TV has always held a great responsibility in changing society and the culture, so any light that is shone on unrepresented voices is only a good thing,” adds Tang.

As well as making sure all sports are reflected on screen, Sowden is calling for more stories showing the lives of women off the pitch.

“Historically, we’ve had to rely on the players themselves to provide fans with insight into these off-field stories on their personal social media channels. We hadn’t seen the investment in the likes of documentaries or longer-form content previously.

“I’ve loved seeing the recent introduction of docs around the Matilda’s and Angel City, but I’d like to see this trend continue. There are such unique and powerful stories to be told around female athletes and this is what we need to pull in new and casual fans along with ensuring an always-on presence.”

## Celebrity catch-22

One issue Anstiss finds in meetings with commissioners is that they look for stories about celebrities that will help draw in the audience. However, that isn’t always possible when it comes to telling stories away from football.

*Game On* explores the growth in women’s sports and the impact on society

**“TV has always held a great responsibility in changing society and culture, so any light that is shone on unrepresented voices is only a good thing”**

Liz Tang,  
Fifth Season



“The issue we have for some women’s sport is that we haven’t had those celebrities as they haven’t had the coverage. So, until we’ve had the documentaries and we’ve had the back content, people won’t know them. I’d like broadcasters and production companies to recognise that there are great opportunities for shows in all women’s sports,” continues Anstiss.

With the increase in the coverage of the World Cup, WSL and Women’s Ashes, Anstiss is hopeful that more sponsorship will come, along with TV audiences and crowds, which in turn will inspire more shoulder content about both individuals and teams.

What is clear is that there is demand. More than 21 million people in the UK watched the BBC’s coverage of the World Cup this summer, and Sowden is now eager to continue banging the drum to ensure broadcasters show commitment to what happens behind the camera by investing in production standards.

“Major events or tournaments attract high production values, such as we saw at the World Cup. But we need to ensure the product is living up to expectations and ensuring the best possible viewing experience for fans, whether that’s more camera angles or the level of those cameras.

“While we need to balance commercial returns with free-to-air distribution, I still believe the benefits of making women’s sports more visible and accessible at this stage to ensure growth are essential so that it can then be better monetised in the future.”

What now for broadcast media and how can it better support women’s sports? With offices in America, Asia and Europe, Fifth Season is actively looking for international untold stories.

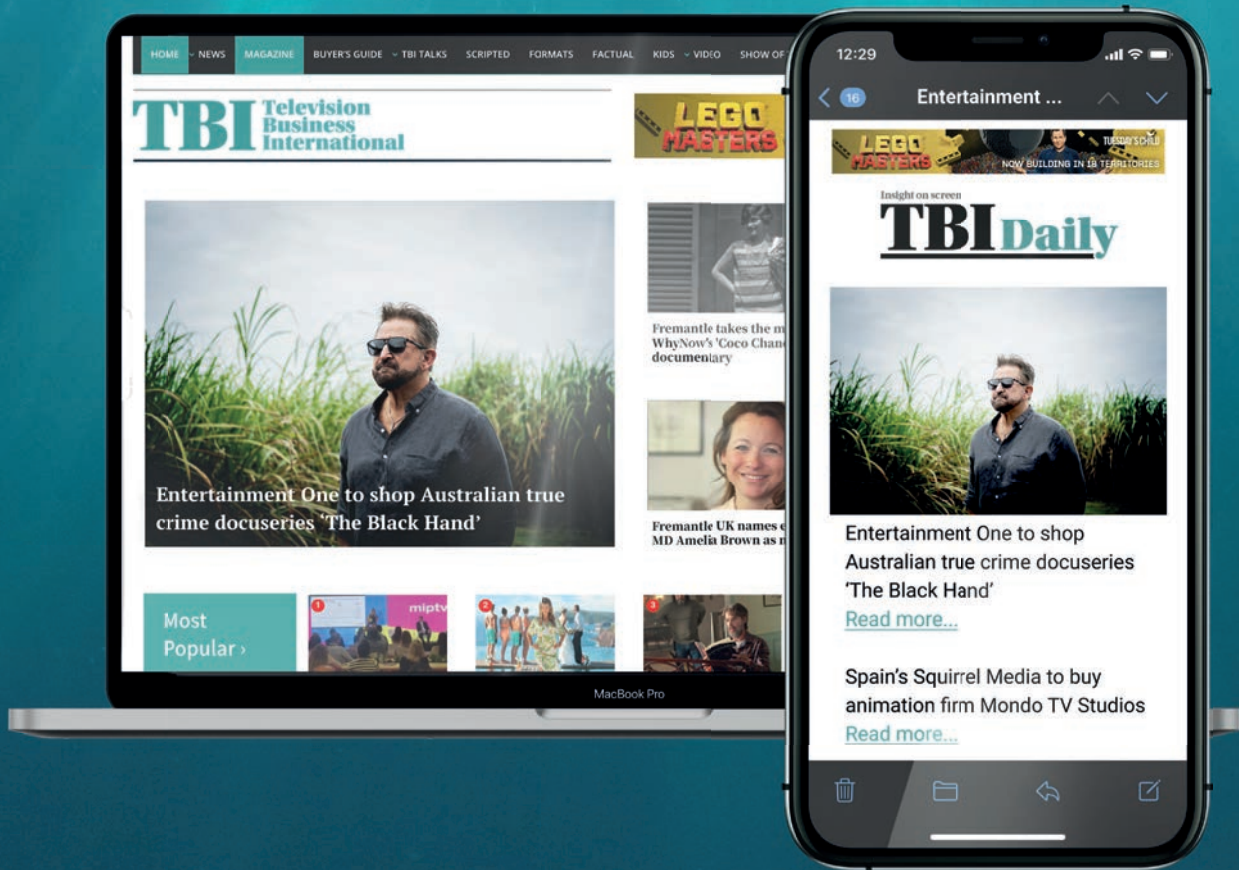
“Even if it’s a sport that has already been covered like football or basketball, if there is a new angle to it or new characters to shed light, we want to hear about them. I would love to see a breadth of sports covered, even down to what could be perceived as niche ones,” says Tang.

Anstiss also wants her work to continue to inspire and tempt audiences about all the other stories out there still waiting to be told. “There is a richness in the stories around motherhood and all the things that women face and overcome. Sometimes content creators forget that because there has been that male bias across production companies and broadcasters.

“It’s become natural to go with what they know, and the names we recognise. I would encourage commissioners to be open-minded because the future is going to be about women’s sports. I want to turn on the TV and see loads more amazing women’s sports content.” **TBI**



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# Fact to Feature: Searching For Satoshi: The Mysterious Disappearance Of Bitcoin's Creator

Filmmaker Paul Kemp tells Mark Layton how he embarked on a global journey in an attempt to solve "the greatest mystery in technological history" for his upcoming CBC documentary

**F**or the past few years, Canadian director and producer Paul Kemp has been on a mission: to solve the disappearance of Satoshi Nakamoto, the mysterious figure who created Bitcoin.

It was not an easy task. While most might now have at least heard of the widespread cryptocurrency, little is known about the person who actually brought it into the world; even their name is a pseudonym.

After launching Bitcoin in 2009, the individual – or individuals –

known as Satoshi Nakamoto disappeared in 2011, as the holder of an estimated one million Bitcoin that have never traded or moved from the blockchain.

The value of this cryptocurrency has gone from less than \$0.01 in 2009 to – at the time of writing – roughly \$26,500 per Bitcoin. And because there will only ever be 21 million Bitcoin in existence, a quantity built into the code, if its price keeps escalating then Satoshi Nakamoto could potentially become the richest person to ever walk on planet Earth.





## Act One: Interest piqued

“When I heard of Bitcoin in 2009, 2010, 2011... it was in the media but I didn’t really know what it was. I thought it was like ‘Monopoly money’, that it was just some crypto-weirdness that I didn’t think had much staying power,” Kemp tells TBI.

“But as the decade went on, I started to realise that people were still working on this thing and the name, Bitcoin, was everywhere. I saw ATM machines selling Bitcoin, I saw vendors or stores

accepting Bitcoin, so I started paying more attention to it.”

Kemp, the Canadian writer, director, producer and showrunner behind documentaries such as *The Pretendians* and *The Rise Of Jordan Peterson*, began looking into the cryptocurrency in more detail, soon hearing of the name Satoshi Nakamoto.

“Everyone who knows anything about Bitcoin realises he’s the greatest mystery in technological history, because nobody knows who Satoshi Nakamoto is.

“All they know is that he could possibly be the richest person in the world in the years to come, because he’s vanished. But no one has really asked the deeper questions about who he is and why he did this,” highlights Kemp.



**“While there have been several attempts to uncover Satoshi, none of them reached the level I would have hoped as a filmmaker”**

Paul Kemp

His interest in the mystery thoroughly piqued, Kemp set out to get to the bottom of it himself, noting: “While there have been several attempts to uncover who Satoshi is, none of those stories kind of reached the level I would have hoped as a filmmaker. So, I went on my own journey to try to investigate this story.”

## Act Two: The hunt is on

Bitcoin is a decentralized global currency, and fittingly, going in search of its creator required more than a little international legwork.

“I needed to get on a lot of planes; I needed to do a lot of interviewing,” says Kemp.

“Throughout the making of this documentary I’ve been to the UK to uncover somebody who has claimed to be Satoshi. I’ve talked to people in Australia. I’ve been to Saipan, which is a US protectorate in the middle of the Pacific, where I uncovered some amazing evidence of who Satoshi might be. And, of course, I’ve been to Silicon Valley and the enormous Miami Bitcoin conferences.”

Kemp was doing more than just make a film, he was also playing detective, and came up with a shortlist of five names that could potentially be the mysterious Bitcoin creator.

“So the main candidates for Satoshi are currently Adam Back, a UK cryptographer; Hal Finney, a now deceased cryptographer who was deeply influential in creating digital currencies; a man named Wei Dai, he’s of Taiwanese descent and has been a cryptographer in the late nineties who had created some precursors to Bitcoin.

“There’s also a fellow by the name of Nick Szabo, who is a polymath. He’s written on all sorts of things from politics to economics, but also had the coding ability to possibly be Satoshi.

“Then there’s Craig Wright, a man who has claimed to be Satoshi

Kemp created a shortlist of potential Satoshis, including Craig Wright (right, below) who claims to be the elusive Bitcoin creator, although not everyone is convinced

for many years. Many people are not convinced that Craig is Satoshi – I got an interview with him and we discuss if he is [who he claims to be].”

Kemp acknowledges that the level of mystery surrounding Satoshi’s identity means that there is also the possibility that the elusive Satoshi is somebody that did not make their way on to his list. “Perhaps we’ll never know who it is.”

And, as alluded to above, not all of Kemp’s strongest suspects are still alive, putting a rumple in his investigation.

“I found out a couple of the Satoshi suspects had actually passed away, so that made it very difficult to get them on camera, obviously. But I was also able to chat to a couple of them.

“Another agreed to go on camera and then kind of ghosted me after I chatted to him, so that was that was disappointing.

“But let’s not forget the fact that, ultimately, whoever Satoshi is, he’s gone to great lengths to be anonymous. He has covered his tracks – so if I’m phoning Satoshi and talking to him, he’s not going to tell me he’s Satoshi.”

### Act Three: Mission accomplished?

The 1 x 60-minute (or 1 x 90-minute) documentary will premiere on Canada’s CBC as part of its factual strand, *The Passionate Eye*, with All3Media International co-producing in association with Paul Kemp Productions and taking distribution rights.

Rachel Job, SVP of non-scripted at All3Media International, says she was quickly intrigued by the documentary. “I’d met Paul at various events over the years, and then earlier this year at Realscreen in Austin we started to discuss the project.

“He didn’t reveal too much other than it was about Bitcoin and was a detective story. The team was intrigued and once we had some more insight into what the documentary would cover it became clear it would be an attractive proposition to our international buyers.

“Most of the project funding plan was place and CBC were attached. Paul was clear about what was needed to greenlight the project, so we were able to move ahead quickly.”

Job sees a lot of international appeal for the film. “It’s an intriguing mystery, offers exclusive access into a digital world many people don’t understand but would like to how it works – and it addresses a fascinating and important question that hasn’t been addressed by mainstream media.”

While the film might now be ready for distribution, Kemp considers it to be “a detective story that’s still unravelling.”

He adds that the doc was “constantly changing and evolving as I discovered new interviewees and new pieces of evidence,” but he is confident that his investigation has paid off and that he now knows who Satoshi’s identity.

“I went into this film not knowing who I thought Satoshi was. I had an idea that it could be probably three or four people. I was thrown for a loop on that and was forced to rethink my conclusions and look at the evidence that people were presenting to me.



“The deeper I did my research, I came up with different conclusions. In the documentary I have presented a character who I strongly believe is Satoshi. Maybe I’m wrong, but if so, I’d love my critics to prove why.”

Viewers will soon be able to decide for themselves whether Kemp has found the missing Bitcoin creator, and as for the filmmaker he says he has achieved what he set out to do.

“I wanted to create a documentary that reached a level I would have hoped for as a filmmaker, which I believe I have.

“I’ve traced a compelling story for the audience, I’ve come up with a creative way of delivering the story and I’ve been honest to the story and not scared to change my opinion.

“Making a fun and entertaining film, but also staying true to what I wanted to discover and create, with broad audience appeal (I hope), has definitely been rewarding.” **TBI**



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# Factual Hot Picks

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Running the gamut from ancient history to current events, this is our selection of some of the best factual programming on sale now



## Julius Caesar: Rise of the Roman Empire (w/t)

Five centuries of ancient Roman democracy was overthrown in just 16 years thanks to the ambition and power-lust of Julius Caesar.

This 3 x 60-minute docuseries explores how Caesar was able to take control of the republic and consolidate its vast power under his imperial rule so swiftly.

The series brings together expert historians, military leaders and experienced political operatives to analyse this epic story, exploring Caesar's remarkable rise to power, the impact it had on Rome's delicate political system and what led to his demise.

"It examines a very specific period in Caesar's life – from the beginnings of his rise to power, through to his death at the hands of the senators he ruled over," says Abigail Priddle, creative director, specialist factual

productions, at BBC Studios. "By taking this boundary approach, we revel in the detail of the story, unfolding each narrative moment of the final years of the Roman Republic in fascinating forensic detail."

Contributors include academics and experts such as the historian and author Tom Holland, alongside input from individuals who bring unique perspectives on power, ambition and political strategy, such as former UK Conservative Party leadership candidate Rory Stewart.

"The drama of Caesar's story, his desire for power and his journey as he claws his way to the top of the political ladder holds remarkable parallels and learnings that make this story feel modern, exciting, and significant," says Priddle.

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**Producer:** BBC Studios The Documentary Unit & PBS

**Distributor:** BBC Studios

**Broadcaster(s):** BBC2 & BBC iPlayer (UK), PBS (US)





## Migrants: The Failures of Fortress Europe

This documentary explores the pressures that the European Union (EU) is facing from large-scale migration and the vast sums of money it is paying in an attempt to tackle the issue.

“To keep migrants away from European shores and limit applications for asylum, the EU has chosen, since 2015, to resort to a new strategy: the externalisation of migration policy,” says producer Anthony Orilange.

“This involves entrusting third-party countries, outside of Europe, with the task of preventing waves of refugees from arriving on the continent. Turkey, Niger, and soon Senegal, Mauritania and even Rwanda, are, or will be, responsible for retaining asylum candidates in exchange for financial or diplomatic advantages.”

Combining field investigation, geopolitical reflection and historical context, this film questions the moral, human and financial cost of the EU resettlement program.

“Our film reveals the mechanisms of this strategy, and the dangers it entails. For migrants, forced to take even more dangerous routes. For transit countries,

**Producer:** Capa

**Distributor:** Newen Connect

**Broadcaster:** Arte (France)

responsible for welcoming growing populations despite strong local tensions. And for the EU, which, by entrusting the keys to the fortress to others, exposes itself to migratory blackmail from its partners and its enemies alike. It all adds up to major geopolitical risk-taking,” explains Orilange.

The producer says that the film is the first documentary to deconstruct and analyse in detail “this strategy of externalisation of European migration policy – and its consequences.”

He adds: “It is not covering the issues from a moral point of view, as there are already many remarkable films evoking the dramatic fate of people attempting a passage across the Mediterranean. Our film is purely factual, even clinical: does this strategy work? What are its financial, human and geopolitical costs?”







## Le Mans 55, The Unauthorized Investigation

This feature-length documentary delves into the biggest tragedy of motor racing, through the eyes of the people who lived it.

On 11 June 1955, the legendary Le Mans 24-hour race turned into a nightmare, following a collision that led to the death of French driver Pierre Levegh, along with 82 spectators, injuring almost 120 more.

Despite this accident, the race continued – without the German team, which withdrew from Le Mans – ending in a bittersweet victory for Jaguar.

Sixty-five years after the tragedy, numerous questions remain despite previous investigation, including why would the files be classified and sealed until 2031?

“The terrible accident during the Le Mans 24-hour race in 1955 is fascinating for its shadowy areas,” says director Emmanuel Reyé.

“It is these areas that we have brought to light. I believe that the investigation reveals why the families’

mourning is impossible and the major role played by the French state in managing the tragedy.”

The film is a personal investigation for Reyé, who reveals that two of his uncles died in the accident.

“It was important to me to reveal this dramatic episode as it has changed my family forever.

“When I started this project, I thought it was going to be a story about the unspoken in families but in the end, my film took on a whole new dimension.”

Reyé questions: “Not being able to get access to the judicial file was a shock to me. Not a single person involved, not a single company, wants to talk about it. Why?”

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**Producer:** Federation Studio France & Empreinte Digital

**Distributor:** Federation Studios

**Broadcaster:** Canal+ (France)



## The Arctic, 66.5 Degrees North

From Greenland with its vast ice sheet and calving glaciers, to the frozen wonderland of the Svalbard archipelago, this 3 x 45-minute series explores one of the least touched places on Earth – the Arctic.

With interest in this remote part of our world growing, from tourists to those seeking the vast mineral resources buried beneath the ice, this landscape is changing and may soon be lost forever.

The docuseries meets the scientists working on the front line to hear their latest findings and what these changes will mean to the planet and the people and wildlife who call the Arctic home.

“The summers are becoming longer, there is less sea ice, and the glaciers are retreating. This opens up new possibilities for the discovery of strategic and rare earth minerals needed for the transition to renewable energy,” reveals Freddie Röckenhaus, director and producer of the series, as well as the founder of colourFIELD.

“The world-renowned American glaciologist Jason Box generously shared his newly published data on Greenland’s melting ice sheet which we

converted into animation. He is also well known for his groundbreaking research on black ice and how the phenomenon is accelerating melting in the Arctic.”

Röckenhaus tells TBI that the series is “more comprehensive” than other documentaries on the Arctic, covering not only its beauty and the wildlife and people living there, but also the topic of natural resources and how climate change is impacting all of this.

“ColourFIELD visited some amazing locations to make this film. I would say many of the places we accessed have never been captured on film before,” adds the producer-director.

“We filmed in some incredibly inaccessible places for this documentary. We have footage from the middle of the Greenland ice cap at the East Grip International Research Station, which is mostly constructed underneath the Greenland ice sheet. The only way to get to East Grip is by military aircraft.”

Meanwhile, the crew were the guests of an Inuit community in Canada’s Northwest Territories.

“Tuk, as the locals call it, is being swallowed by the sea due to melting permafrost,” says Röckenhaus.

“We filmed a team of international researchers working with the locals to find a new location for the town and solutions to the landscape becoming misshapen or lost by the effects of climate change.”

**Producer:** colourFIELD

**Distributor:** Orange Smarty

**Broadcaster:** ZDF (Germany) & Arte (France)



## Eva Longoria: Searching for Mexico



Following CNN and Raw TV's previous collaboration on *Stanley Tucci: Searching For Italy*, comes this 6 x 60-minute series in which US actor, producer and director Eva Longoria explores her Mexican heritage by embarking on a culinary and cultural tour of the country.

"The series is a perfect blend of Mexican history, culture and cuisine that searches for the real essence, origins and flavours of Mexico," reveals Claire Jago, EVP of sales & acquisitions, EMEA, at Banijay Rights.

"Eva Longoria travels to different states, meeting the locals and understanding their different favourite dishes, whether that be street food, traditional dishes or a high-end dining experience. It generally avoids traditional tourist areas rather than featuring them."

The star is "passionate about her own heritage and showcasing all that Mexico has to offer," says Jago. "She is both informative, inspiring and authentic in her appreciation of Mexican cuisine and culture. Eva's down to earth personality and relatable approach means she

**Producer:** Raw TV

**Distributor:** Banijay Rights

**Broadcaster:** CNN (US)

creates a great rapport with the many families interviewed in the series."

Along the way, Longoria reveals how Mexico's rich culture, landscape and history have shaped its food.

"The series highlights Mexican cuisine beyond stereotypes. It delves into its intricate flavours and history," elaborates Jago. "Flavours such as chocolate and vanilla originate from Mexico. Fruits such as tomatoes and avocados originate from Mexico.

"It's a country with a huge variety of cuisine influences which many people will most likely not be aware of.

"Great cuisine, beautiful landscapes and friendly people. This is a show that makes your mouth water and if you've never been to Mexico you'll be booking a trip after watching this."

# Pooling ideas



Mixed-genre formats are flooding the market but delivering on their initial appeal is tougher than it looks, writes Richard Middleton

*Deal Or No Deal Island* sees contestants competing for the chance to play the original *Deal Or No Deal*

**F**ormat creation has always been partly about finding that next turn of the wheel, but increasingly, wheels are not so much being turned as geared together.

From *Love Island Games* and *Make Love Fake Love*, to *Queer Explorer* and *Stranded On Honeymoon*

*Island*, formats hitting la Croisette this MIPCOM are distinctly mixed-genre affairs.

For those creating truly new formats, the emergence of these shows might be frustrating – as might their appeal to buyers.

*Deal Or No Deal Island*, for example, might not





be breaking many new boundaries, but the concept immediately cuts through.

Contestants travel to the banker's island, where there are more than 100 hidden cases. Teams must then find the cases to be in with a shot of playing the original *Deal Or No Deal* game against the aforementioned banker, all against the background of a tropical setting.

For broadcasters, it seems like something of a no-brainer in these risk-averse times: indeed, NBC is rolling the show out in 2024.

Combining format genres such as adventure and gameshow is not new, but their rise is not surprising, says Tim Gerhartz, MD of Red Arrow Studios International. It has two mixed-genre formats at MIPCOM: dating-adventure show *Stranded On Honeymoon Island*, and *Claim To Fame*, which combines mystery and reality as ordinary people with famous relatives are challenged to keep their identities a secret while exposing the others one-by-one.

"These shows offer a different take on a format [while still being] a trusted and familiar formula," he says. "They give viewers something different without completely pushing buyers out of their comfort zones.

"And as many broadcasters at the moment are having the most success with tried and trusted genres, and often extensions and adaptations of key brands, then a concept that offers a different mix of those genres and shows is attractive."

*Stranded On Honeymoon Island*, meanwhile, was only launched earlier this year, having been created by Snowman Productions, but it has already been picked up by Seven Network in Australia, Germany's ProSiebenSat.1 and SIC in Portugal, with more deals in the works. So what's the attraction?

"When Snowman and Red Arrow brought the project to us I could see it straightaway," says Kristine Willems, channel manager of Belgium's VTM, which commissioned the show.

"I could visualise the jump from the boat in the wedding clothes. I could see the challenge for two people trying to get to know each other in this beautiful environment, looking for a way to connect but with nowhere to escape to during the tougher moments.

"I know enough about island adventure shows to know what they can do to a person and how that experience can bring out the best and sometimes the worst in them. Can the toughest journey be the quickest route to love? It's a pure and simple concept. I was looking for a loud show to profile for VTM2 and I decided instantly that it was for us."

Mike Beale, ITV Studios' MD of global creative & production support, offers a similar assessment and his slate suggests the demand is rising: *Love Island Games*, combines former *Love Island* contestants with "super-sized classic games"; *Party To Die For* merges celebrity, crime and reality; and *Loaded In Paradise* (aka *Catch Us If You Can*) sees teams hunting down one another, before being brought together in a luxury safehouse to create tension as they reunite.

"The increase at the moment is because of how hard it is to get audiences to new shows in a world of broad choice," he says. "So we give audiences things they love (without using an existing brand) but look to surprise them with a smart twist or new direction.

**"It could start with a funny brainstorming session where we cut the famous shows' titles into two and then shuffle the parts – so *MasterChef* and *Dating In The Dark* could become *Master In The Dark* and *Dating With The Chef*"**

Arnaud Renard,  
Can't Stop Media





*Stranded On Honeymoon Island* (top) has been picked up for several iterations, while *Rat In The Kitchen* (below) combined cooking and murder – though only lasted one season in the US

## Growing audiences

Combining traditional subsets also means, theoretically, appealing to a broader audience although smashing two disparate genres together comes with its own risks, says Arnaud Renard, partner at France’s Can’t Stop Media, whose slate includes *Queer Explorer*, a combination of travelogue and the queer/drag queen genre. It debuted on France 5 earlier this year.

“Broadcasters intend to attract as many viewers as possible and by mixing genres they try to please a larger audience,” he says. “But the risk is you create a format that actually does not satisfy anybody.”

Arnaud does not believe buyers are actively seeking mixed-genre shows but says the soaring popularity of dating means there are myriad opportunities to combine it with other genres. “It’s probably because in real life, there are an infinite number of ways to fall in love, so there are no boundaries to what a dating show could be.”

For Beale, there is no one answer to which genres can be combined beyond “what’s the most surprising”. He points to *Rat In The Kitchen*, which took cooking and “threw in the murder mystery/guessing game to layer the show.” It only survived one season on TBS in the US, but it was at least commissioned.

“This is not dissimilar to our dating show *Make Love Fake Love*, which again puts the mystery guessing at its heart,” Beale adds, highlighting that such shows are emerging following the success of formats like *The Masked Singer* and Netflix scripted hit *Knives Out*.

“Documentary and factual work really well,” adds Tim Whitwell, creative director for Banijay’s Shine TV in the UK, which is behind Channel 4 show *Banged Up*. The format sees celebrities sharing a cell with former criminals in a bid to explore how they feel about their incarceration and the prison system more broadly using a rig set-up.

“What we’ve got with *Banged Up* is that the documentary approach allows us to talk about what are quite serious subjects – law and order, crime and punishment – but do it in an entertaining and sometimes very amusing way,” he says.

“The people in the prison aren’t boring, they talk about these issues using a lot of humour because that’s how they get by, it’s a coping mechanism. That kind of humour has allowed us to make this a very entertaining show. We’re not doing it in an irreverent way or in a mocking way, we’re trying to bring out some of the prisoners’ humour and allow us to discuss serious subjects.”

## Grinding gears

While mixed-genre formats might provide initial cut through, getting through the development and production stage provides plenty of opportunities for mishaps.

“It could start with a funny brainstorming session where we cut the famous shows’ titles into two and then shuffle the parts,” Arnaud says. “So *MasterChef* and *Dating In The Dark* could become *Master In The Dark* and *Dating With The Chef*,” he adds. Both shows sound imminently plausible.

Whitwell adds that having creatives who are expert in their respective genres is also vital to create a show that actually delivers.

“You absolutely have to find people who have experience in both fields. For example, our series editor, Emma Young, comes from a documentary background. Our executive producer, Tom Clarke, comes from a fact-ent background. So the two of them together, along with me, have enabled us to make this mash-up format work. Without one you wouldn’t have the other.

“We wouldn’t be able to make this series work if we didn’t have story creation, which is a fact-ent way of telling stories. The documentary discipline is vital because you want everything to feel authentic, and not just made up for television. It’s really important to have both those worlds coming together.” **TBI**





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# Savvy operators

*Drag Race* is a global format success story, but how did World Of Wonder's Fenton Bailey and Randy Barbato do it? The duo tells Richard Middleton about streaming, strategy & scripted

**F**ew formats have travelled into 24 countries and fewer still have done it without the backing of a large group.

Yet the chances are that you've heard of *Drag Race* no matter where in the world you live. It is one of those brands that has transcended TV – local versions are in the UK, the US, the Philippines, Chile, Mexico and France to name but six – and made it into the mainstream. It is a story of how to take a brand global, but from a rather unlikely starting point.

"It wasn't really about global domination," says a chuckling Fenton Bailey, who co-founded production firm World of Wonder (WOW) with Randy Barbato in 1991. Since then, the pair have created a sprawling enterprise: sure, it houses *Drag Race*, made famous by RuPaul, but Bailey and Barbato have taken the format and run and run.

There is now a streaming service (WOW Presents Plus), FAST channels and a YouTube offering based around the *Drag Race* franchise, while the company also runs live events, creates podcasts and, it should be noted, produces a whole raft of other shows ranging from the *Million Dollar Listing* franchise to docs such as *Wojnarowicz*.

"A lot of the dialogue in media these days is about having the biggest footprint possible, but actually, I think the idea behind WOW Presents Plus, for example, is that it's a specialty service for an audience that is more like an extended family than a mass audience," Bailey tells TBI.

And creating that has not been by design, he adds, admitting that without "billions of dollars to throw at original programmes" the growth has been slower but more organic.

"Sometimes circumstances conspire to help you because it actually feels that it's authentic growth and that very specific focus has actually been really helpful," he continues.

"That is especially the case at this point in the streaming wars, where everybody's saying the model doesn't work. You know, the model does work – it just doesn't necessarily work with massive giants throwing billions of dollars back and forth."

*Drag Race Down Under* is the Australian version of the drag competition format that has now travelled to 24 countries – and still counting









## Control & competition

While WOW has taken drag to new heights, Bailey says the subject matter was never niche but there was a perception that it was. The duo were able to foresee a wider audience and, crucially, made a series of savvy moves when it came to retaining rights that allowed them to retain control of their format and create the franchise seen today.

“The secret to the success of the growth of *Drag Race* has to do with how scrappy World of Wonder is because initially, when it first started, there was very little money to be spent on it,” Barbato says. “We deficated it so that we could maintain control, but we didn’t have very much money and the outlet didn’t have very much money.”

“It was unusual,” Bailey continues, “because – and this is the very short version – the network said they had X amount of money to spend on the show. And we said, well, that’s not enough.”

“And by the way, when they said they had X amount, it was like 10 cents,” adds Barbato.

“We said it’s going to cost X amount and they said they couldn’t spend any more,” Bailey says, with WOW then “putting in the extra” but taking rights for rest of the world.

“They said absolutely not, we cannot do that deal and so again, we said, OK, sorry we just can’t do it. We thought it had gone away. But it didn’t, they came back and said, OK we’ll do that.”

Reflecting on the sprawling reach of *Drag Race* today, it is easy to forget the format’s slow burn. *Drag Race* in the US was an Emmy-winning show, but there were years without versions in major European markets

“There was a sense of like, oh, well, it’s great that it’s in the States, but we don’t think it would be right for our audience,” Bailey says, but persistence paid off. Word of mouth got around and executives found their kids and partners watching it, paving the way for growth.

Now 24 countries in, the process of production remains “artisanal” Barbato says, with companies in each territory “rolling up their sleeves and crafting it for their own countries”.

Fenton Bailey and Randy Barbato launched World of Wonder in 1991, with streamer WOW Presents Plus rolling out worldwide in 2017



But there have also been developments, including the creation of a hub in Bogota, where the Mexican, Brazilian and German shows were shot over summer.

## Next moves

The myriad versions have also enabled WOW to expand further and to make the most of the international audiences around the world by bringing them into the central *Drag Race* concept.

And indeed, while US studio giants continue to flail as they attempt to make direct-to-consumer services pay, the tech of streaming is offering potential for smaller – but by no means small – audiences dotted around the world. Drag was one such area.

“There was a sense that there’s an audience out there, but how do we reach them? And then technologically, it became possible,” with WOW Present Plus rolled out worldwide in 2017.

“But there’s a myth that it’s either linear or it’s streaming and everybody’s in the battle for domination. Actually, there’s a world in which a lot of these things are additive, and collaborative and all work in concert. What’s great is that we’ll have a linear broadcaster in our territory, as well as streaming, either locally or internationally. And the combination works.”

Bailey and Barbato are now plotting deeper moves into scripted – they were involved in the 2021 Jessica Chastain movie *The Eyes Of Tammy Faye* – with “a bunch of stuff in development” including two projects with studios.

With a global brand able to cut through, the opportunity seems clear. And there’s no doubt that Bailey, Barbato and the wider WOW team are well aware of that. **TBI**







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## Sales pitch

Idea to Iteration is a new regular strand that explores how a show has gone from being the kernel of a thought to a format with global potential. First up, Fox Entertainment's *Snake Oil*

“As someone who spends way too much time online shopping and specialises in buying random products I may never use, *Snake Oil* really speaks to me,” says Allison Wallach, president of unscripted programming at Fox Entertainment. The format debuted on Fox in the US last month





and is now being taken to market for the first time at MIPCOM. It looks to turn the wheel on the veteran sales pitch shows such as *Dragons' Den* (aka *Shark Tank*) – and similar concepts such as *Billion Dollar Buyer* and *Million Pound Menu* – by adding a layer of glitz and glamour, as well as a healthy dose of competition, to the familiar recipe.

**“Creator Duncan McIntosh is a Brit who has lived in America for a long while and is fascinated by the myriad of consumer goods available here and the pathway they need to take to successfully break through the clutter”**

Allison Wallach,  
Fox Entertainment



In *Snake Oil*, the contestants are pitched products that may be real – but could be fakes

## Idea on the page

The format's origins lie with Duncan McIntosh, VP of development at Fox Alternative Entertainment (FAE), who became intrigued by the way products of varying quality found an audience.

“He’s a Brit who has lived in America for a long while and is fascinated by the myriad of consumer goods available here and the pathway they need to take to successfully break through the clutter,” Wallach tells TBI.

“It’s amazing how a person can create a product – whether it be completely normal or entirely insane – and sell it to customers before realising they even want or need it. It’s pretty simple when you think of it after the fact, but we wanted to create a gameshow that takes a fun look at this premise.”

The initial concept was a hybrid of ideas, combining comedy and play-along elements that would engage viewers.

Contestants are pitched unique products by entrepreneurs, some of whom are showcasing real business ventures and others who are ‘snake oil salesmen’ with products that are fake. To progress, contestants have to guess the real products and which are a sham, with a cash prize lying in wait for the winner.

“Development took approximately a year and there was a lot of discussion about the products we wanted to feature and how we could make sure that they feel real, even if they weren’t,” Wallach adds.

“That was key because it’s crucial to the play along. We also talked about the structure and mechanics of the game. Things like, how do you go from one round to the next; how do the rounds differ; and can contestants poach ideas?”

## Talent & greenlight

Central to the format was a comedic element and David Spade was secured as ‘ringmaster’, to offer up “trademark sarcasm, coupled with a troupe of up-and-coming comedic actors who hilariously bring each product’s infomercial to life,” Wallach says.

“It’s a brilliant, broad viewing experience because you have these ridiculous products and services you can debate with your family while watching and letting the contestants and celebrity advisors help guide you along throughout the entire episode,” she says.

Will Arnett was also onboard via his Electric Avenue Productions, with the *Lego Masters* presenter’s company keen to cement in the concept of “a payoff for everyone”, Wallach continues.

“You want the competition to be meaningful for



the contestants, who are playing for life-changing money, so the stakes are high. But we also needed to make it fun and suspenseful for the audience and that's where David Spade and celebrity advisors like Will, Rob Riggle, Christie Brinkley, J.B. Smoove, Bethenny Frankel and others came in."

With the format developed and talent attached, FAE took the project to Rob Wade at Fox earlier this year and it was formally greenlit in April.

Its 'in-house' nature made the process simpler and Wallach says it was "an easy call to move forward with it, especially when we nailed down the format with the help of our showrunner, Neal Konstantini, and had Will and David attached."

### Production & travels

With the show's budget and greenlight secured earlier this year, Wallach and the FAE team, along with Arnett's Electric Avenue, got ready to move into production.

Having made the products - both real and fake - the creation of the infomercials that would bring lightness to the show were created.

Ahead of production, Wallach says the main challenges revolved around "getting the balance between the comedic elements of David and infomercials and the suspense of gameplay just right," with "strong hooks" required to keep the viewer engaged.

With talent, contestants, assets and production schedule in place, the show started filming over the summer in Atlanta with the first show going out 27 September. It was handed the slot that immediately followed the premiere of *The Masked Singer* season 10, providing a welcome boost for the new entrant.

With the show's first season now on air in the US, Fox's alternative division is taking the format to the international market at MIPCOM.

"This is a format we think has great potential, given its play along premise and business/product element that's applicable to every territory," Wallach says.

"There hasn't been a new and fresh business-oriented gameshow on the market in a while, and we think *Snake Oil* can fill that void. We've had some preliminary discussions with key buyers and are looking forward to holding more during MIPCOM." **TBI**



# Are you in The 1% Club?

A large, 3D golden logo for 'The 1% Club' is the central focus. The logo consists of a large '1', the words 'THE 1%' stacked vertically, and 'CLUB' in large letters at the bottom. It sits on a circular, glowing golden base. The background is a virtual studio set with a blue and red color scheme, featuring a curved audience seating area with people, stage lights, and smaller versions of the logo on the side walls.

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# Format Hot Picks

From survival competition shows to pansexual dating series and some very big boats, here's our pick of the hottest new formats on the market

## The Lost Ones

**C**o-operation is key in this new survival competition show in which a group of ordinary people are dropped into the remote wilderness in individual locations.

Far from civilisation, they are each equipped only with a radio, an essential survival kit and a locked canister containing an unknown share of a cash prize fund.

Before evacuation arrives, they must find the rest of the contestants stranded somewhere across the landscape. If they want to claim the cash prize, they must find a way out together, before the time runs out.

“The nature of the prize really stands out in our format. Unlike other survival competition formats, contestants will each carry a mystery portion of the prize with them in sealed canisters. Not only is this an incentive for each of the contestants, but also for the group, as it motivates them to

support and work together all the way to the finishing line,” says Sune Roland, CEO of Strong Productions.

“Where most survival formats have a ‘last man standing’ approach, our show is the extreme opposite. Its underlying premise is that we are stronger together than alone.”

The contestants face “hunger, fatigue, isolation, cold nights and challenging terrain, as well as inner struggles,” reveals Roland, while the biggest obstacles for the production crew involved the logistics of keeping dry and warm while filming in such a remote location.

“We see huge potential for this format internationally,” he adds. “The overarching story about personal development through challenging environment and group dynamic is universal – and we think that our time is craving stories that reassure us that we are stronger together.”

**Producer:** Strong Productions

**Distributor:** Fremantle

**Broadcaster:** TV2 (Denmark)





Top  
Pick





## Hot Yachts: Miami

Sea, sun and sex-appeal are the watchwords for this new reality format in which a group of super-competitive, good looking, party-loving, yacht brokers compete ruthlessly to sell everything from \$1m motor launches to \$100m super yachts.

Miami and Fort Lauderdale are home to the largest yacht brokerage in the world, as well as the biggest boat show and the largest number of luxury yachts – making it the ideal location for the show.

“Miami is the Mecca of high-end yachting in the US and is known for its glam, money and cultural diversity,” says Travis Webb, SVP of sales, Americas, at Fifth Season, which is why it was only natural that the 8 x 60-minute series is set in sunny south Florida.

“I see this as *Selling Sunset* meets *Below Deck*. So, it’s easy to understand the appeal,” says Webb. “It couples the wish-fulfilment of seeing ultra-high-end

property (in this case luxury yachts) with the drama, competitiveness and scandal that ensues when you have a bunch of big personalities doing business in this small world.”

The brokers were selected because of their “success, charisma and penchant for drama,” explains Webb, who sees international potential in the format.

“I know from my experience at Netflix that shows like *Selling Sunset* have universal appeal and travel well. You’re getting a glimpse into a world that few have access to and that’s interesting whether you’re in the US, France or South Korea.”

**Producer:** Curve Media

**Distributor:** Fifth Season

**Broadcaster:** Paramount+ (UK)





# Love ALLways



Online content creator Lexi Paloma is looking for love and – in a break from typical dating show norms – as a pansexual bachelorette, her dating pool includes suitors of all genders.

“Aimed at a young adult audience, this reality dating format has diversity and inclusivity at its heart,” says Laura Burrell, VP, international formats, Paramount Global Content Distribution.

“Our bachelorette is a Gen-Z influencer who identifies as pansexual and struggles to find love, despite having a large social media following and no fixed type when it comes to who she will date.

Heading into a house full of possible future partners, Paloma looks to narrow down her pool of hopefuls – and they will have to work hard to impress, says Burrell.

“A creator with a social following, like Lexi Paloma, already has access to some of the most attractive and successful suitors in a city. She’s had the opportunity to date very notable people. Despite that, she’s still single. That means the daters must be top-calibre and competitive to win her heart.”

Upon arrival to the house, the suitors are split into two teams, each team being led by one of two dating mentors – Spicy Mari and Anthony Recenello. The suitors compete in daily challenges – some practical like

a cooking challenge, some more fun and light-hearted – in hopes of winning a date with Paloma.

“For the suitors, it’s all about having the maximum amount of time with the bachelorette. Those who spend the most time with her have a better shot at winning her heart, so some might try to steal a bit of her free time in-between the challenges.”

However, all is fair in love and war – and nothing is stopping Paloma’s potential suitors from hooking up.

“The appeal of this format should be two-fold,” adds Burrell. “Firstly, it is a reality dating show – still one of the most in-demand genres internationally. Secondly, it appeals to a young adult audience. Attracting the sought-after Gen-Z audience is no easy feat.

“*Love ALLways* achieves this by successfully combining the traditional rules and tropes of reality dating with a well-known TikTok personality. Local licensees of the format will be able to build their adaptation of the show around local social-media stars, tapping into their online following.”

**Producer:** Awesomeness Unscripted and Digital Studio

**Distributor:** Paramount Global Content Distribution

**Broadcaster:** Paramount+ (US)



## The Underdog

What seems like a straightforward reality competition format with a charismatic cast comes with an unexpected twist in the form of the unassuming ‘Alan’.

The participants believe they are competing in a popularity contest set in a unique environment, with underdog Alan amongst them. However, living secretly next door is a group of reality show celebrities who are playing their own game to manipulate everything to make sure that ‘Alan’ wins.

“The celebrities act as ‘producers’, so they have the ability to control key elements of the contestants’ world, not least the confession room interactions, which allow them to know what every player is secretly thinking,” reveals Primal Media’s Mat Steiner, executive producer on the series.

“They can create and control the challenges, influence the VTs played in the house, and even introduce format twists. They have one objective: to make the underdog shine and become the most popular person who wins. And where necessary, to try and hold back the incredible reality characters that the underdog is up against,” he adds.

‘Alan’ is deliberately set up as the antithesis of typical reality show contestants in order to make his successes all the more baffling to the other participants.

“All the contestants are conventionally popular, have big followings online and excel at influencing people,” says Steiner. “They are ‘alpha types who usually win contemporary reality shows. The underdog has none of these qualities – he is more of an observer than an extrovert and has an unfazed ‘why not?’ attitude about trying to be the most popular. He’ll be fine if he loses.”

Nick Smith, EVP of formats at All3Media International, meanwhile, believes that *The Underdog* “has all the ingredients to be an international hit. Reality and talent shows made up of gifted and glamorous people with big personalities are hugely popular all over the world and *The Underdog* offers a charming and surprising reinvention of these formats.”

**Producers:** Primal Media & Motion Content Group

**Distributor:** All3Media International

**Broadcaster:** E4 (UK)



## The Summit

A group of 14 strangers faces both the beauty and harsh realities of New Zealand's rugged Southern Alps in this reality competition series in which they must work together to overcome nature and win a large cash prize.

Each of the contestants is carrying an equal share of AUS\$1m, but they have just 14 days to reach the peak of a distant mountain to win the cash.

Standing in their way are a series of endurance and morality-testing challenges.

"Inspired by mountain action thrillers, expect money exploding and ropes burning as the contestants climb to safety," reveals James Townley, CCO, development, at Banijay. "Every challenge has a different consequence, ensuring the path to the summit is unpredictable and the stakes are supercharged."

The strangers have the choice to work together or turn on one another once the going gets tough and even

if they reach the summit in time, who will walk away with the money remains in question.

Hosted by actor Jai Courtney and already recommissioned for a second season by Nine Network, the Australian version doubled its viewership on catch-up.

The format was specifically designed to be adaptable and scalable to different budgets and territories, and Townley sees it working well internationally. "New Zealand as a location was perfect, but there are epic mountain ranges right across the world that could work just as well.

"As long as casting focuses on an ordinary and varied group of people and the core premise remains the same; the three key format beats can be quickly dialled up or down depending on budget and the pace & flow required in a particular market."

*The Summit* is not about recruiting a group of mountaineering enthusiasts, adds Townley. "For the premise to work they all need different skill sets, values and should not be comfortable in that environment. Humour and different levels of physicality is key."

**Producer:** Endemol Shine Australia, Nine Network

**Distributor:** Banijay Rights

**Broadcaster:** Nine Network (Australia)



# A licence to thrill

In a wide-ranging conversation, Mark Layton talks to BBC kids' chief Patricia Hidalgo about the UK pubcaster's content demands, the myriad challenges facing the children's sector and her mission to create more local animation

**A**s director of children's and education for the BBC, Patricia Hidalgo holds arguably one of the most important roles in shaping the landscape of kids' programming in the UK.

In her position at the public broadcaster, which is the biggest commissioner of children's content in the country, Hidalgo is responsible for leading the department's operations and content strategy across the BBC's Bitesize, CBeebies and CBBC services, as well as for kids programming on VOD platform, BBC iPlayer.

Her division commissions and acquires content for children aged 0-12 across all genres, from cartoons to news, with a remit to broadcast shows that inform, educate and entertain young audiences through local commissions. What she is looking for right now is "scripted comedy and drama, original UK animation and compelling, ambitious, factual entertainment covering the whole breadth of contemporary children's interests," Hidalgo tells TBI.

BBC Children's and Education will be ordering around 350 hours of original content for 2023/24, but those slots have almost already been filled, she says.

"In the case of factual, entertainment and drama, timing for commissioning of this content can be from six months to one year before we need the show on-air. On the other hand, when it comes to animation, we do tend to commission much further in advance, sometimes up to two years before we need it."

These lead times are only expanding, says the exec, with it becoming "harder and harder to find all the third-party funding we need to commission some of our shows." For this reason, the gap between commission and production is getting longer, she adds.

Money is tight all round, with the rising cost of production hitting the whole industry. Added to that, the UK TV licence fee, the BBC's primary source of funding, was frozen by the government until 2024, compounding the issue for the pubcaster.

What the BBC can contribute towards a production "really depends on the show, where it is produced, how much the producer can raise, if it is a UK show or a foreign commission, if it is hyper-local, or if it has got potential to find international sales or co-producers," says Hidalgo, who joined from WarnerMedia in 2020.

**"BBC Children's is known for taking risks and making new formats and shows no commercial channel would dare make for children"**



"Our needs are many, our funds are limited and we have a set of obligations. Our primary remit is to bring the best content to our UK audience whilst we also support the UK creative industry, so our contribution will take all these parameters into consideration before we decide how much we can or should invest."

## Seeking partnerships

One way in which Hidalgo is looking to make her budget go further is "by increasing our co-pro partnerships and by looking very carefully at what we greenlight. There is no space for shows that don't help us build iPlayer."

There is also a balance to be had: "BBC Children's is known for taking risks and making new formats and shows that no commercial channel would dare make for children," says Hidalgo. But that doesn't



mean shows can't return, with ground-breaking titles of their time such as *Numberblocks*, which teaches mathematics to children from the age of four, and historical sketch comedy show *Horrible Histories*, "which after 13 years... is still a huge success."

Hidalgo tells TBI that co-productions have become "an essential part of our strategy" and highlights three projects for which she is actively seeking partners: pre-school series *The Underglow*; animated comedy adventure for 7-9-year-olds *Captain Onion's Buoyant Academy For Wayward Youth*; and dialogue-free slapstick animated comedy *Duck And Frog*.

These three shows are the animation finalists from the Ignite initiative, launched by Hidalgo in 2021 to unearth new animation talent and create more homegrown series that reflect the lives and culture of UK kids – and to specifically offer young viewers an alternative to imported American cartoons.

"Animation is the most watched and loved medium in TV for kids. The UK is one of the most talented and creative countries in the world when it comes to making TV programmes, and especially those for children. So many world classics and big TV animated pre-school children's brands have been created by British writers, creators and animation talent, from *Winnie The Pooh* to *Peppa Pig*.

"But one thing that's missing today is enough British animated titles for those aged seven and older. Most animated TV shows that kids consume today are coming from the US. The common language is our biggest problem. It means easy access for US studios and cheaper shows for most UK broadcasters to just acquire this US content."

Hidalgo says it is "imperative" that children over the age of seven start watching locally produced animation that has "British values and represents the UK culture."

### Original content focus

While BBC Children's and Education does acquire international content, it represents "a small percentage of our total content spend".

Australian animation *Vegesaurs* and evergreen Japanese favourite *Pokémon* are currently among the BBC's most successful acquisitions, but the primary focus remains on originals.

International hit *Bluey*, which is a co-commission between Australia's ABC and BBC Studios, and *Hey Duggee* and *Bing*, are doing "great numbers" for pre-schoolers on CBeebies, while *Supertato*, co-produced by BBC Studios Kids & Family and China's Tencent



*Phoenix Rise* (above) is a top performer with teen viewers, while *Bluey* (below) continues to be a hit with audiences

has also proved popular.

Then, for the 7-10 age group, live action comedy *Odd Squad* and animation *Boy Girl Dog Cat Mouse Cheese*, factual entertainment shows *Horrible Histories* and *Operation Ouch!* and period dramas *Dodger* and *Mallory Towers* are all top performers.

"Older kids, 10-12, have also reacted very positively to new seasons of our ongoing football drama *Jamie Johnson*, as well as a new entry *A Kid of Spark*, both titles hitting top CBBC spots on iPlayer," while school drama *Phoenix Rise* and *The Next Step* have "done phenomenally well" with the harder to reach 13-15 demos.

### Kids sector challenges

American imports are not the only thing pulling children away from local programming, with digital platforms such as YouTube, gaming and social media all competing for their attention. The BBC knows it needs to be on these platforms to maintain and grow brand awareness, says Hidalgo.

"We have devised a strategy to reach them in these other platforms, whether it is with an event to view the first episode of the new season of *The Next Step* live with the cast on TikTok, or a new themed game of *Jamie Johnson* on Roblox."

And these efforts appear to be paying off, reveals the exec: "We recently launched a *Newsround* channel on TikTok, which is actively bringing back audiences to our *Newsround* online offer every day and that's very encouraging."



There's also the competition from global streamers, with their deep pockets and even deeper children's programming libraries, but Hidalgo is confident in the BBC's position as a broadcaster straddling both linear and digital to differentiate its offering.

"It's a very competitive landscape out there, and yes, we have suffered like everyone else from the increased competition as well as the flood of new children's content coming from the US that UK kids have access to today. We do have one thing US streamers don't, and that's both a linear and a VOD platform that can complement each other."

BBC Children's uses its linear channels as family co-viewing opportunities and marketing windows, and Hidalgo says there has been a correlation between new children's brands being launched and promoted on these channels and their immediate pick-up by viewers when then launched on VOD service iPlayer.

The kids' exec is not averse to co-producing with the streamers either, so long as it doesn't compromise the public broadcasting remit.

"We have done quite a few [co-productions] and share acquired content between us," she says. "Disney, like us, also acquired *Bluey* for the UK, and we have a couple of co-pros with Netflix, *The Worst Witch* and *Get Even*."

"But we will not do co-pros with content that clearly defines who we are."

"It all depends on what, when, as well as how much we are investing, but yes, we are very much open to sharing acquired content and co-producing new shows with everyone."

## Tax incentives required

The challenges faced by the UK children's content industry are myriad: while streamers and new media are drawing audiences away, the biggest problem for producers, as ever, is financing.

Many in the sector lamented the loss of the BFT's Young Audiences Content Fund last year (though the BBC did not join the scheme), which saw rivals ITV, Channel 4 and Channel 5 use government money to support the creation of content for young viewers.

"In general, the BBC doesn't believe contestable funds are the best way to address failure within the market, which is why we did not participate. The government also felt that a contestable fund was not the most suitable way forward either," says Hidalgo.

The exec instead suggests that there are other initiatives that could help to solve the problem of the lack of investment in "culturally relevant British content" for children.

"We recently saw a change to UK production tax



Hidalgo is seeking partners for Ignite finalists *Captain Onion's Buoyant Academy For Wayward Youth* (top) and *Duck And Frog* (bottom)

credits. Whilst we welcomed this increase, unfortunately it is still not competitive enough if compared to the European Union (EU).

"I believe we can go further; an extra tax incentive to take the current UK tax rebate to somewhere between 30% to 35% to match what other EU markets have, which is linked directly to a point system to deliver enhanced culturally relevant content for UK children.

"This would generate further investment in British content made primarily for a British audience, but which could also have international appeal, increasing co-pro possibilities between broadcasters in the UK and other countries," says the former Disney exec.

Whatever the future holds, Hidalgo doesn't believe "this failing children's industry" is out of the woods yet. "In the last 10 years, new streamers and pay-TV competitor channels have been commissioning, producing and acquiring so much more content for children than ever before, but they have now stopped doing as much.

"The UK TV industry is not just local; it is global, and anyone you talk to is in the same position – there is less investment and less money overall for children's content. I think we are going to see more consolidation of studios and TV networks and more sharing of programmes and rights across the board globally." **TBI**



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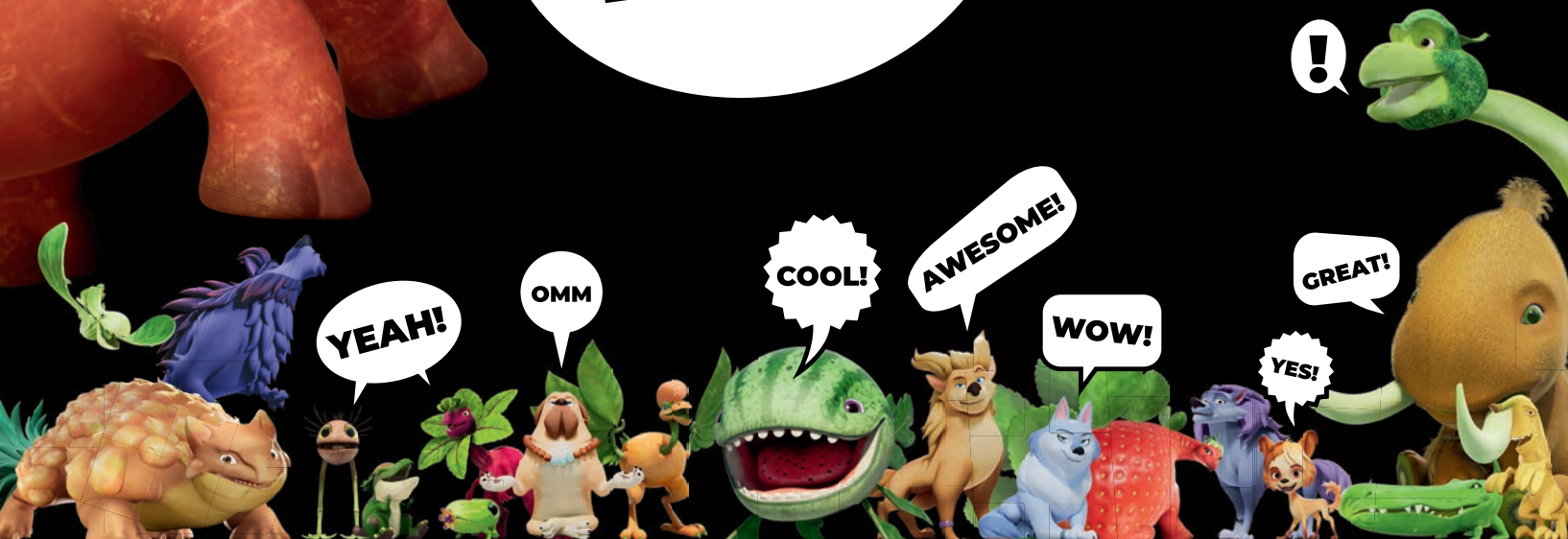
**VEGESAURS**



**SEASON TWO**



**US TOO**



**YEAH!**

**OMM**

**COOL!**

**AWESOME!**

**WOW!**

**GREAT!**

**YES!**



## Tech & Analysis Tim Westcott

# Why FAST is suited to children's audiences

**“While children's channels certainly have a niche on FAST TV, the economics do not support originals on any but the lowest of budgets”**

Some time ago, we surveyed the children's programming on UK TV channels for a presentation. One of the UK public service channels was scheduling episodes of the same pre-school show around the clock. At the time, this seemed to be a waste of valuable broadcast spectrum, but it now turns out that channel was just a few years ahead of its time.

The rise of FAST channels has been one of the talking points of the last year or so in media, even though the general concept has been around for longer. The acronym stands for free ad-supported streaming television. Unlike traditional linear ad-funded channels, FAST channels are fully distributed via digital networks that are fully addressable and are therefore perfectly suited to targeted advertising.

FAST platforms include PlutoTV, part of the Paramount empire, consumer electronics manufacturers LG, Roku and Samsung (the growth of smart TVs has been a key dynamic in the rise of FAST) and newcomers like Plex and Rlaxx.

Channels available on FAST services are a mix of brands that have moved from traditional TV distribution platforms and channels that originated as on-demand services (usually YouTube in the children's space). Many are single-IP channels: Nickelodeon's archive is particularly prominent in FAST, with *SpongeBob SquarePants*, *iCarly*, *Dora The Explorer* and *Blue's Clues* channels among a raft of others.

Crucially, channels are curated rather than being algorithm driven. In many ways, they tap into a consumer preference for passive, 'lean-back' viewing as an alternative to on-demand services. The children's audience – generally more prone to watch back-to-back episodes of the same show on repeat (as parents of young children will wearily attest) – is perfectly suited to FAST.

Omdia's snapshot of FAST channels in Q1 this year identified 85 children's FAST channels in the US, 53 in Germany and 39 in the UK. The pre-eminence of the US is no surprise given that it is well in advance of other markets in terms of development, with the US and Canada combined accounting for 90% of global FAST channel ad revenues.

The main platform for the genre in the US is PlutoTV, with Nick-based channels featuring prominently, as well as Moonbug's *Little Baby Bum*, the Lego Channel and *Yu-Gi-Oh*. Roku is also a key player in the US with 26 children's channels, while LG has 24. Some 23 of the children's channels are single-IP – the others feature a mixture of content.

The next largest FAST markets outside the US are Germany and the UK, and here Pluto TV is also the leading player in children's FAST, with 30 channels in Germany and 10 in the UK. Rakuten TV is active in both countries, with 10 channels in the UK and seven in Germany, and Samsung has seven children's FAST channels in both countries.

After Paramount, the most active children's channel owners in the FAST channel space are WildBrain, Toon Goggles, Moonbug and Mattel. These are mostly companies that have a sizeable archive of programming available, ideally with an established audience and strong branding. Channel operators have told us that 100-150 hours of content is a minimum for a FAST channel. The schedule also needs to be refreshed, and many single-IP channels will have a limited shelf life.

There are a variety of business models for FAST channels. Typically, content owners would share revenues from their channel with the platform owner (with another cut going to the technology partner). The split is usually 60/40 in favour of the channel provider. The other major model is inventory share, where the channel owner sells some of the advertising itself. A less frequent model sees the platform paying an annual fee to the content owner and keeping 100% of ad revenues.

While children's channels certainly have a niche on FAST TV, the model will not work for all types of content and the economics certainly do not support original production on any but the lowest of budgets. Omdia's consumer research also indicates that while the heaviest users of FAST skew young, families with children under-index as FAST users. Children's channels account for just 5% of the overall FAST channel offer in the US and 7% in the UK. **TBI**

Tim Westcott is senior principal analyst, digital content & channels, at research powerhouse Omdia. TBI and Omdia are both owned by Informa



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## Opinion Anna Home & Greg Childs Reclaiming the 'lost audience'

**Following their Children's Media Yearbook article in July that reviewed the UK kids' content scene, Anna Home and Greg Childs update us with stark but optimistic news on recent developments**

Anna Home and Greg Childs are the chair and director, respectively, of The Children's Media Foundation. Both are UK kids' media veterans, with Home having previously served as head of BBC Children's and Childs launching CBBC and CBeebies while head of BBC Children's Digital

**A**s we head into MIPJR and MIPCOM, the kids' industry needs some good news – not just in the UK, but worldwide, because the situation is tough.

Delegates at July's Children's Media Conference (CMC) in Sheffield, which gathers most UK kids' content professionals together, were as upbeat as ever, but also hit hard by the collapse in commissioning in the UK.

With no Young Audiences Content Fund to boost commissions from the commercial public service broadcasters (ITV, Channel 4 and Channel 5), the BBC cutting back and focusing on animation, and the cavalry much less likely to come to the rescue – i.e. the streamers cutting their commissioning ambitions too – the situation is probably at its most difficult in living memory.

At the same time there were considerable concerns expressed at CMC about the future for broadcasting and for society, as the young audience deserts linear channels for unregulated SVOD and AVOD services.

The numbers are stark, with average viewing figures on the CITV channel before closure as low as 4,000 per programme. The 'lost audience' is a real and current issue. And it's a threat not just to the business models of companies delivering content to kids, with loss of advertising revenue leading them to spend less. It also potentially impacts on the entire future of public service media across Europe. This has implications for social cohesion, engaged citizenship, life-long learning, well-being, appreciation of impartiality and much more. If a generation grows up with no understanding of public service values and no loyalty to the funding models that underpin public service content, that also threatens a vital source of media funding.

However, concerns at CMC led to action. In an unprecedented move, all sides of the industry have come together to create a proposal to put to government. They're asking politicians to recognise the value that the UK's world-class kids' media industry brings to the economy and culture, and the immense importance for society and individuals that kids and teens can continue to watch a wide range of relevant, appropriate, engaging and stimulating content,

designed for them as young people, and reflecting the diverse society and culture in which they live.

A working group of broadcasters, industry associations and audience advocacy bodies including the Children's Media Foundation has already met and is drafting proposals. Before the end of the year an all-industry summit will be called to build a campaign to persuade government to take action – to increase industry support, give serious thought to new forms of regulation and incentivisation, and protect the future of public service content for young people.



At the Children's Media Foundation, we strongly believe that a healthy UK industry will lead to greater choice and quality of content for the audience. The two areas of concern are interlinked. The lost audience impacts on the commissioning crisis and both issues need to be resolved to support the industry and the audience. And this isn't just an issue for the UK. Already, a number of countries are tackling the 'lost audience' in a variety of ways, including levies, quotas and regulation. It is vital that governments and regulators understand just how much the media landscape has changed, how kids and young people are at the forefront of that change, and how that threatens not just the stability of media businesses but much more besides. **TBI**



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## Paws-itive about pets

In the first instalment of a new strand of articles exploring how local shows are reaching new shores, Mark Layton goes behind the scenes at China's *Pet Hotel* to find out how the animated series made its way to MIPCOM





**I**t has been almost 18 months since China's Tencent Video opened the doors to *Pet Hotel* and its colourful cast of furry friends are now looking for new homes on the international market by way of the Croisette.

Robin Guo was inspired to create *Pet Hotel* after rescuing an array of animals

The 2D animated series, which is aimed at children aged 7–9, has already proven popular in its home country, taking the number one spot for family co-viewing during its debut on Tencent last year.

Produced by Tencent Video and animation studio Miaow's House, alongside GZ Art-land, the show follows the adventures of Lili the dog, Bubu the guinea pig and cats Nai Nai and Vicky as they welcome new animal friends to their home.

Unlike other hotels, the Pet Hotel, which has been converted from an old grocery store, is filled with high-tech inventions created by the pets' caregiver and hotel owner, Robin, with massage tables and automatic feeders on offer.

The animal buddies and their young owner face various quirky customers and their wacky pets every day, with life lessons being learned along the way.

Canada's WildBrain picked up the series for international distribution, outside of China, in August and Caroline Tyre, VP of global sales & rights strategy, tells TBI that the series stands out due to its "laugh-out-loud comedy, cleverly exploring the unique characteristics of different animals to deliver entertainment and humour, all the while teaching kids how to care for their pets."

### **Bringing home strays**

The original idea for the show came from Robin Guo, chairman of the board of Miaow's House and director of series, who was inspired to create *Pet Hotel* by the many stray animals that he has given a home.

"I have rescued over a dozen stray cats – and basically all the fluffy creatures around my neighborhood are waiting for me to start dinner every day. They all have their own unique personalities, but they all have one thing in common: they eat and then





leave, totally free,” shares Guo.

“One of the strays, a piebald tom, loved to be close to me and decided to live in my home. At first, I wanted to call it ‘奶奶’, which means Grandma, but I didn’t think it was the right name for him, so with a little word play I changed it to ‘乃乃’, which has the same pronunciation and is how Nai Nai, the protagonist in *Pet Hotel*, got his name,” Guo tells TBI.

“In addition to supervising my work, Nai Nai also likes to socialise – the puppies and other small animals around the house all know Nai Nai, and he is not shy about bringing them to the house for dinner and to the yard to play and rest.

“Surrounded by such a friendly and warm

The animated series has already proven a co-viewing hit for Tencent Video



atmosphere, I was inspired to create an animated sitcom with animals as the main characters. This was how *Pet Hotel* was born.”

## Pet problems

As for the animated animals and their adventures, Guo says that each of the fluffy characters face different challenges over the course of the series.

“For example, there’s the beautiful Arctic fox who has to cool down indoors and a social media influencer dog who gets anxious away from his cell phone,” Guo explains.

“Then there’s the twin rabbits who look almost exactly the same but have totally opposite personalities, the chameleon who is a master of hide-and-seek, and the little penguin who was supposed to go to Antarctica but got wrongly delivered.

“Even Robin, the hotel’s owner, has to worry about maintaining his relationship with his girlfriend. No matter how much of a mess they make, they all become good friends in the end, and the concept of ‘love’ overflows in every episode of *Pet Hotel*.”

Guo tells TBI that the focus of the series is on the relationship between pets and people.

“The core concept is that pets are irreplaceable family members. It popularises the scientific knowledge of animals and pet-loving and pet-keeping, transmits the goodness and virtue of human beings, and positively guides children’s hearts towards goodness through the way of getting along with small animals. Kindness and tolerance, sharing and giving - these are the core themes of this show.”

## New shores

The series made its debut in China on Tencent Video in February 2022, where it has been “a big success so far, proving well-loved by many pet lovers and family viewers alike,” says Selina She, director of kids’ IP, development and programming, at the streamer.

“Comedy is an important part of our original content offering and the universally hilarious humour in *Pet Hotel* that stems from the relationships between pets and humans has proved hugely popular,” She explains to TBI.

The Tencent exec adds that the show has also found a following in “children and grown-ups alike”, with its “cast of quirky characters” proving popular among multiple demos.

Having made an impact in China, WildBrain and Guo are now hoping that “the entertaining efforts”, as She puts it, of the *Pet Hotel* inhabitants will engage a new wave of buyers looking to book a stay. **TBI**



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# Calling all cats

Banijay Kids & Family CEO, Benoît Di Sabatino, was introduced to *Shasha & Milo* at MIPTV back in 2019. He tells Mark Layton why he was immediately moved to secure the South Korean project



**F**our years ago, Benoît Di Sabatino, CEO of Banijay Kids & Family, watched a presentation from a South Korean production firm.

Pingo CEO Hee Seok Shin and COO Seul Gee Yoo were presenting a project at the Cannes kids’ content market and “animal lover” Di Sabatino admits to being instantly hooked. “I took just three minutes to tell them I wanted to be a part of this co-production.”

Fast-forward to 2023 and the result of that encounter is *Shasha & Milo*, a CGI animated children’s action-comedy co-

produced by Banijay-owned Zodiak Kids & Family France and South Korea’s Pingo Entertainment.

**“I took just three minutes to tell them I wanted to be part of this co-production”**

Benoit Di Sabatino, Banijay Kids & Family



“The creative work they had done was amazing. I remember during this meeting, they presented a trailer, the animation, the character designs and the concept – everything was on the table.”

The admiration was very much mutual, reveals Shin, telling TBI that Zodiak had been his “first choice” partner for a Pingo that was, at that time, a “young company”, only being officially registered the prior year, with aspirations to take its project worldwide.

While Pingo brought the art and the idea, Di Sabatino says that Zodiak was able to provide help with the writing and the “international concept to go to a global market.”

## Brand aspirations

The 25 x 22-minute and 12 x 2-minute show, aimed at 6-9-year-olds, follows titular 12-year-olds, Shasha and Milo, as they juggle school and their home lives, along with their secret power to transform between human, cat and a formidable hybrid form. The duo are tasked with protecting their island home from villainous cats and their often ridiculous plots to gain ultimate power, while also dealing with the daily complexities of pre-teen life.

The show is executive produced by Di Sabatino and Shin, alongside Banijay’s Gary Milne and Yoo attached as co-director and creative producer, and Hyeong Min Kim as co-director.

The series was first picked up by China’s Tencent Video in May 2022, and subsequently found pre-sale partners in Warner Bros. Discovery Latin America and Korean public broadcaster EBS – as exclusively revealed by TBI earlier this year.

Pingo Entertainment exclusively controls all rights in Korea, Japan and Southeast Asia, while Zodiak Kids and Family Distribution holds international sales rights, and also handles sales, marketing and consumer products. “We now have a strategy in place with the style guide ready with partners aligned; we’ve started [talking] pre-sales, and we’re really pitching it widely to everybody,” Delphine Dumont, CCO of Banijay Kids and Family, tells TBI.

“We’re [also] partnering on the commercial aspect because we want to make it a success, to become a brand and and hopefully *Shasha & Milo* ticks a lot of the boxes.” **TBI**



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## Kids Hot Picks

Our selection of the best and latest kids shows heading to market

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 Top Pick
**Davey & Jonesie's Locker****Producer:** Marblemedia**Distributor:** Distribution360**Broadcaster:** Hulu (US), Amazon Prime Video (Canada, Australia & New Zealand)

Multiverses are all the rage right now and this new young adult comedy series from Canada's Marblemedia is getting in on the action with the story of the titular Davey and Jonesie, two eccentric high schoolers who embark on a wild adventure after stepping through a portal built by their science teacher.

However, while the friends are initially excited to trade their own reality for another, their travels only ever bring them to bizarre, alternate versions of their high school surrounded by offbeat versions of their classmates.

These new worlds include "a universe where the only food consumed is oranges, a world with no music, and a *Hunger Games* inspired world which pits Davey against Jonesie," reveals Diane Rankin, executive producer and EVP of rights at Distribution360.

"Davey and Jonesie are always their true selves from universe to universe, but we see them grow in their own relationship and in understanding of their peers as the season progresses.

"In addition, each universe has a distinct look which dictates how the characters present themselves. Creator and showrunner Evany Rosen's

vision drew on B-movies and camp classics to make a weird, fun and curious environment in which the characters can live large," explains Rankin.

It's not all fun and games though, as the girls are being chased by a highly motivated and severely intense Delinquent Acquisition Deputy (D.A.D) from the Management Organisation of the Multiverse (M.O.M) determined to send Davey and Jonesie to a 'Detention Dimension' and permanently erase their memories of each other.

"This character-driven comedy is like nothing else currently on offer for this demographic and that is what our partners at Hulu and Amazon Prime Video told us they were looking for," said Rankin.

"It really occupies a sweet spot of sophisticated humour that's approachable for younger audiences, with a signature style that feels specifically designed for them. The Davey and Jonesie friendship is both relatable and aspirational; this type of buddy comedy-for-comedy's-sake is a domain most often reserved for boy's stories, so it's fresh to see two wacky, but clever teen girls at the helm."

### Hold On Gaston!

**Producer:** Dandeloo

**Distributor:** Dandeloo

**Broadcaster:** Canal+ (France)

French producer-distributor Dandeloo has partnered with Aurélie Chien Chow Chine for this adaptation of her popular children's books, *Les Émotions De Gaston*.

The author, working with Chloé Sastre and Romain Gadiou, has turned the stories into a 52 x 11-minute 2D animated series following the titular Gaston, a young unicorn, and his friends, who live in the village of Corneville-la-Joie.

The comedy is “rooted in daily situations,” says Emmanuèle Pétry Sirvin, producer & head of international at Dandeloo, who tells TBI: “Kids will see Gaston going to school, having fun with his friends, making plans with his cousins, visiting his grandparents, but moreover they will be able to identify with Gaston as their own selves, going ‘wild’, being free and being themselves in a secure environment.”

Sirvin adds: “Gaston is a very enthusiastic kid – well a unicorn, really – a very special and super intense unicorn,” with a unique ability: his mane changes colours according to his emotions.

The series, aimed at upper preschoolers, aims to help kids identify and manage their emotions. “Thanks to Gaston’s extreme (visual and funny) embodiment of a given emotion, children will be able to see and feel their own self in a ‘distortion mirror’, which will allow them to laugh and understand the ridicule of each situation,” says Sirvin.

“Being able to put a precise name on each emotion will help them attach a tag to their own reactions when they do feel it themselves,” she adds.





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### Buddybot

**Producer:** Xilam Animation

**Distributor:** Xilam Animation

**Broadcaster:** France Télévisions (France)

Aimed at kids aged between six and 10, this 52 x 11-minute series explores the friendship between Chloe, an ordinary 12-year-old girl, and Buddybot, a little robot from the future.

“Chloe and Buddybot are set on helping the planet, whether it be by planting loads of flowers across town, saving rare caterpillars from a cold wave or trying, dressed up as ghosts, to sway industrial

baddie, Nina Manchkin.

“Our duo knows that every little step counts, which is why they want to convince family, neighbours and other townspeople to start helping the planet too,” reveals Safaa Benazzouz, EVP of distribution at Xilam Animation.

“Chloe is an average girl who wants to play video games, ride her skateboard and spend time with Buddybot. When facing

hardships, she will nonetheless find surprising and relatable solutions to complete her missions. As for Buddybot, he is a robot like no other you’ve ever seen: no superpowers, no high-tech gadgets, just endless optimism and cuteness.”

Created by Vincent Souchon, not only does the 2D animated series introduce young viewers to the issues around climate change, but also teaches them the importance of optimism and perseverance.

“*Buddybot* focuses on the following theme: how do you balance theory with reality? For

instance, how do you complete a noble mission against climate change, when your flaws get in the way? Our characters are imperfect: their desires and fears often give a surprising turn to our stories. But we embrace them as they are: our viewers will feel no sense of guilt or inadequacy watching this series.

“Neither Chloe nor Buddybot are perfect role models or knights in shining armour. Because doing good doesn’t necessarily come easy, and it’s a lot of hard work – but it’s worth it,” says Benazzouz.



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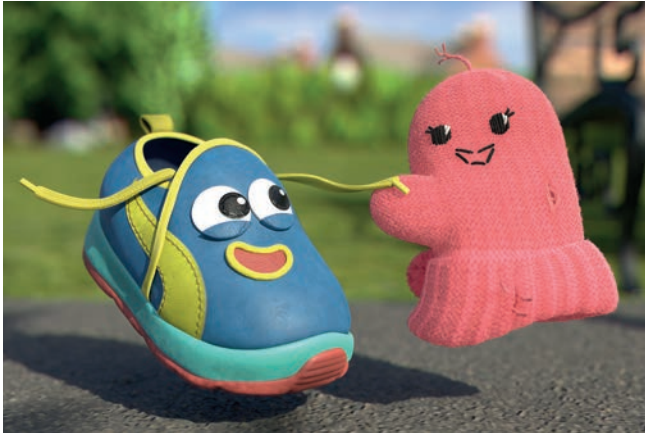
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### Mitten & Shoe

**Producer(s):** Matinai Animation, Hotel Hungaria & Jam Media

**Distributor:** Aardman

**Broadcaster:** CBeebies (UK) & Ketnet (Belgium)

Developed with the support of the now defunct Young Audiences Content Fund,

this 52 x 7-minute pre-school animation is set in a playground and follows the titular Mitten

and Shoe and their friends, who are an assortment of children's belongings that were left behind and are now looked after by an umbrella named Mc Drizzle.

It's always playtime at the playground, where Mitten and Shoe meet new visitors from around the world, learning new songs and games.

"They'll get lost in a maze of Mitten's messy things, dig up all sorts of treasures in the sandpit, make stick dens in the park with Sargent Boot, help a lost Santa's hat and save Christmas, have splashy fun in the splashpad next door and learn to beatbox with a pair of flipflops," reveals Robin Gladman, Aardman's head of acquisitions, sharing just a few of the adventures the duo have in store.

The idea for the series came from creator Nai Morris's own experience taking her children to the playground and seeing other kid's belongings – like dummies, hair clips and shoes – left on the fence or dropped on the floor," reveals Gladman.

"This sparked the idea for a mitten and a shoe being left behind and becoming best friends and living in a playground with a family of other left behind characters."

He adds: "It's a comedy for young children, so it'll be full of delightful and playful silliness from Mitten and Shoe and their quirky band of friends.

"We want the series to be very relatable for preschoolers, about making new friends, kindness, acceptance, and play."

### A Horse Named Steve

**Producer:** Sixteen South & Nelvana

**Distributor:** Sixteen South Rights

**Broadcaster:** RTÉ (Ireland) & Treehouse TV (Canada)

Irish animation studio Sixteen South and Canada's Nelvana co-developed and co-produced this 2D animated series, based on the picture book by author-illustrator Kelly Collier.

Aimed at four- to seven-year-olds, the series follows the titular horse on his mission to be his 'best self'. Steve is a fine horse, but he thinks he could be finer – he wants to be exceptional.

What he lacks in common sense, Steve more than makes up for in positivity and determination. Never daunted by his failures, Steve wears his heart on his hooves and with the help of his friends shows that being yourself is the most exceptional thing you can be.

"Whether it's winning the forest relay race, becoming an 'ever-so-fancy' unicorn or

excelling in the local talent show, Steve throws himself into everything with unbridled enthusiasm and utter self-belief," says Sixteen South's chief exec Colin Williams of the series' comedic equine hero.

"Sometimes life (and Steve's own actions) get in the way but that's all part of the ups and downs of growing up," he continues.

"The second we saw the book cover we fell in love with Kelly Collier's wonderful illustrations. Once we peeked inside the character of Steve came to life and jumped off the page to us," reveals Williams.

"The humour is wonderfully visual and physical, so we knew immediately it was something we wanted to bring to screen.

"There's also an underlying



message of learning how to navigate the world in your own unique way which is something we explore in all the stories we tell," said the exec.

Williams adds that one of the big appeals for young audiences will be Steve's "curious, happy-go-lucky approach to life".

"He's so endearing that you can't help but cheer him on. His world view is very much that of a seven-year-old so it is very relatable to the audience and we know kids will adore following

him along on his laugh out loud adventures.

"The show is absolutely beautiful and we know it's a world that all kids will want to spend a lot of time in with Steve and his friends."

Williams adds that Sixteen South had been looking to partner with Nelvana and its parent company Corus Entertainment "for years".

"We want to make the best shows and Nelvana are one of the best," said Williams. **TBI**





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## Last Word Angie Cox

# Nothing but the truth

**“Today’s stories are going to be tomorrow’s ‘history’ and it’s crucial not to re-frame the narrative to fit contemporary values”**

**W**hen it comes to the past, historians are on a continual voyage of discovery to authenticate information based on records passed down.

Sometimes, our understanding of historical events can be clouded by the judgements and social mores of the era of the historian who wrote about it and so ultimately, we are constantly interpreting and re-evaluating events to some degree.

Throughout history, there have been many incredible women and when it comes to retelling their stories, the lens we use to explore their lives also has to look at the societies they lived in, especially when you consider that over the course of history patriarchy dominated.

Therefore, we must look at the limitations, restrictions and politics that women had to navigate so we don’t judge them too harshly in comparison to contemporary life. In that way we can pay homage to their achievements, good and bad.

Over the years I have worked on multiple unscripted productions, in particular true crime, but most recently the experience of filming my first historical series, *Queens That Changed The World*, as a creative journey has been fascinating and raised a lot of questions and thoughts about how to shine a spotlight on these women’s incredible achievements as disruptors of their time, amid the adversity they faced.

Whether it was female pharaoh Hatshepsut, British warrior queen Boudica or Queen Victoria, there were some key factors that needed to be considered to do their stories justice. Rather than produce a biographical retelling of their lives, we wanted to focus on a few key moments that had a real impact on history.

We felt it would engage a wider audience if we focused on trying to get a sense of the person in question, to ‘walk a mile in their shoes’ so to speak. What was their emotional journey? How did they handle conflict? What motivated their actions? How might they have felt at the time? And also, not shy away from the more problematic issues that arose from their decisions.

Eleanor of Aquitaine, for example, was an incredible politician who understood when to be strategic, ditching King Louis VII for an up-and-coming Henry II, or when to call upon her power as a woman and mother, as evidenced in her emotional letters to the Pope when she was trying to secure the release of her captured son Richard.

After weathering a scandal early in her career, Queen Victoria quickly learnt the power of positive PR and understood the impact photography could have in shaping her public persona, much like we do today with social media.

The female pharaoh Hatshepsut used male iconography in her statues and hieroglyphs. She harnessed a familiar visual language to cement her rule for her people, all the while maintaining peace, whereas her predecessors and successors opted for war.

Language and the way in which our queens have previously been portrayed (sexual slander being a common one) also needed to be given consideration. It was important to unpack certain preconceptions and question what relevance they have today.

Maybe Queen Anne was in a relationship with her husband and Sarah Churchill? But she also helped to unseat her own father from the throne, and oversaw the union of England and Scotland.

Queen Elizabeth I almost certainly wasn’t ‘The Virgin Queen’, but she understood an unmarried monarch was a problem, and repackaged her ‘virgin’ status to show how she was married to the nation, so didn’t need a man. But in reality, when your father beheads your mother, perhaps marriage poses other challenges.

As we know, today’s stories are also going to be tomorrow’s ‘history’ and it’s crucial not to re-frame the narrative to fit contemporary values but to look closely at the context of the moment, then you can think about how to play with the narrative, whilst analysing from a modern-day point of view, after all, we are all a product of conditioning, whatever the era. **TBI**

Angie Cox is senior producer at Woodcut Media, the UK factual indie also behind shows such as *Confessions Of A Psycho Killer*, *The Murder Of Meredith* and *Hitler: A Life In Pictures*



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