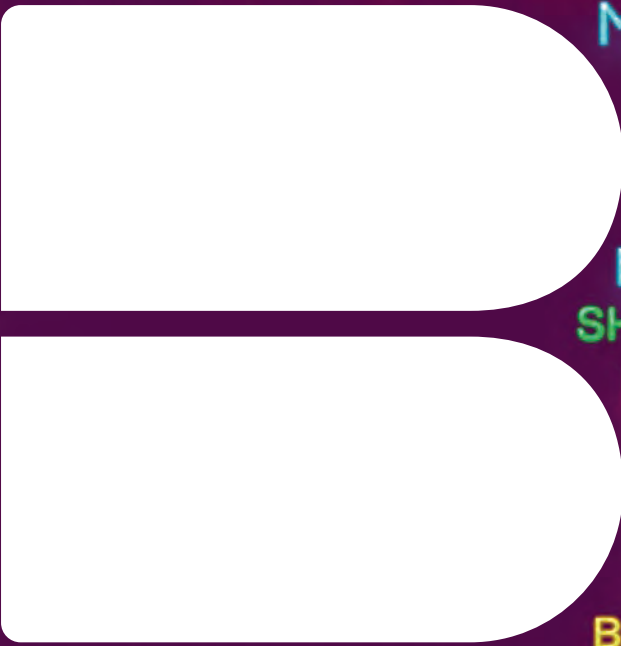


TBI Television Business International

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 LOVE TRIANGLE
 FOUR KINGS
 UPSIDE DOWN
 SURVIVOR
 Front Row
 FALLEN
 DOMINA
 The Fifty
 ANATOMY OF A MURDER BIG BROTHER LEGO® Masters
 The Other Mrs Jordan Three Little Birds The Fortune Hotel
 WOLF HALL: THE MIRROR AND THE LIGHT ROGUE HEROES
 RFDS: Royal Flying Doctor Service THE HARDACRES



MASTERCHEF
 ARCHER
 STAR ACADEMY
 MURDER IN HANKO
 BROCÉLIANDE
 SHAOLIN HEROES
 BANGED UP
 Ambulance
 BUDDY GAMES
 THIS TOWN
 Brits Down Under



The Ivy



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HAMLET

TBI February/March 2024



While the industry has had a pretty rough start to 2024, London TV Screenings and Series Mania in Lille both underline the potential knocking about in this turbulent industry of ours.

To test the temperature of the distribution sector in particular, we've been in touch with the bosses at almost all of the companies involved at London TV Screenings this year to find out what they're making of the sector. Among numerous other insights, each exec has picked three words to describe the industry at present – and not a swear word in sight (see page 10). There's also the hugely popular TBI London TV Screenings map, your handy guide to all the events taking place across the city as almost 30 companies vie for buyers' attention.

For those headed to Series Mania, we dive into the fast-moving scripted sector to find out how finance models are shifting (p26) while for those with a tech bent, check out our fascinating deep dive on VR content following the launch of the Apple Vision Pro (p22). There's also an in-depth exploration of where the global formats market is at (p30), all the hard-hitting columns you've come to expect from TBI and we've even squeezed in some of the best shows (p34). Enjoy...

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About Town

Miami kicks off the year

Miami was bustling in January with the US city once again the first major industry destination of the year with not one, but two, markets to kick off 2024.

Delegates headed out in force to The Magic City for both NATPE Global and Content Americas, with both events claiming thousands of guests and buyers in the high hundreds as competition hotted up under the inconsistent Florida sun.

Despite the weather, major discourse at the two conferences was in ready supply with discussions surrounding the streaming course-correction and the plunging number of scripted series orders among hot topics.

The state of the Latin American market was also explored, with the growing importance of Mexico



and Brazil highlighted, while perennial favourites such as the growing prominence of co-productions and FAST were also very much on the table.

And there was also time for some good old fashioned person-to-person networking as cocktails clinked.

Collaborative approach

Everyone TV's upcoming UK free TV service Freely was the hot topic at Outside The Box 2024 in early February.

CEO Jonathan Thompson (below) used his annual speech to tell audiences at the London event that the service, which will carry content from the BBC, ITV, Channel 4, Channel 5 and UKTV, would "offer the best way of watching live TV in the streaming age."

Panels stressed the need for collaboration between broadcasters, with the UK looked up to as "the gold standard" among other European operators.



Political discourse



Black Panther's Lupita Nyong'o brought star power to the Berlinale international jury (above) last month. The opening day was marked by a furore over the invitation and then disinvitation of far-right politicians to the annual German film festival. Attendees were also eager to get their first look at *Small Things Like These*, the latest film starring Cillian Murphy, and the first Irish picture to open the market.

Swings & Roundabouts

278 Rachael Ray's Free Food Studios received an order to produce 278 episodes of new content for A+E after the US network took a 50% stake in the firm


20 Netflix is continuing its investment in Spain, with more than 20 shows - such as drama *The Asunta Case* - set to come out of the country in 2024

800 Painful times at Paramount Global as 800 staffers were let go, with CEO Bob Bakish saying the decision was not easy but "essential" for earnings growth

59 *Yellowjackets* firm Lionsgate saw production revenues decline year-on-year by 59% in Q3, with the US strikes cited as the major contributing factor



BOSSANOVA



THE INFINITE DEEP: STORIES OF LOST SUBMARINES

1 x 60' / 1 x 90'

History & Mystery



MUSEUM MYSTERIES

6 x 60'

History & Mystery



THE PUSH

2 x 90' / 3 x 60'

Crime & Investigation



Formats Siobhan Crawford

London TV Screenings' unofficial theme: Oldies but goodies...

As the industry descends on London, TBI's resident format expert Siobhan Crawford dives into the back catalogues

It's that time of year again folks, hold onto your hats... we are kicking things up a gear! London TV Screenings continues to grow in prominence. So what should we be thinking about when we land in London? Food (I do), looking shiny and presentable (absolutely)... and content? Perhaps, but not as you would expect.

Bob The Builder

The build up to spring sees people scrambling, looking for ways to get ahead and ultimately survive. We collectively feel the need to bring new offerings, stay relevant, keep our market presence, and I relate to this completely; I am exhausting myself staying proactive! Market expectations are high. As London TV Screenings (and even MIPTV) approach, people will be bringing out older titles, lower-performing titles, paper and piloted titles, just to have something to say, to justify their travel and expenses. And while we should all be utilising our catalogues fully, adding new 'lower quality' content just to have something to say is wrong. I have said it before: build brands, quality over quantity. Manage expectations. Make format owners understand the calibre a format needs to get to for launch.

And if we can all just accept now that we are in for a 'light' content season then we can agree to calm down and just enjoy! We will have nice conversations and become more informed, and perhaps buy something unexpected. Or you finally pull the trigger on that paper idea you have in development that you have been delaying (ideally with that indie who really needs a good start to the year and who CAN deliver the quality).

The OGs

I want to ask you to dig deep into your industry memory bank and consider what is already in the market at a time when the groups will be fuelling you with popcorn to keep your butts in the seats for as long as possible in London. Consider what already exists. I know so much of the market feels a resistance to reboots, but I have a resistance to commissioning new formats that are shit/expensive/rate badly/that already exist in old formats.

I spoke about back catalogues with a friend recently

and she asked if I remembered *Superstar Ding Dong*. This was not a format that came to mind first so I did laugh, but admittedly it's the right thought. Catalogues are amazing! They have so much in them. So I asked those lovely London 'international' TV peeps to name their favourite older formats and boy did we get answers (finders fees will apply if you lot start recommissioning!):

- *10 Years Younger*
- *Pants Off Dance Off*
- *The Photo*
- *Wives With Knives*
- *Don't Tell the Bride*
- *Man O Man*
- *Too Academy*
- *Supersize Superskinny*
- *Faking It*
- *Bridalplasty*

Evolve or revolt

IP is mostly controlled by the groups. It's a bummer but this truth is like an iceberg: their reach goes far into the archives of TV history, way beyond our view, to the obscure and unknown. Entire catalogues. I don't know when enough will ever be enough. But I do believe it has to change: right now commissioners are low risk – meaning they want content that is tested and they want the lowest risk prodco, which 'apparently' means group companies. The indies struggling to survive cannot get the commissions because they cannot access enough tested shows. The groups keep bringing back the same shows each market but in 2.0 version, leaving others in catalogues. Big question: is it time to unlock the catalogues to save the ecosystem? Put an end to 'perpetuity', catalogue deals and exclusive partnerships? Remember 'co-operation' was the buzzword of 2023. No man is an island, no group can be one either... is it time to start discussing how to use the content you have or let someone else try? #lovemeorletmeg

Go forth, enjoy the merriment of London in all its wet glory and expense... I have a feeling this spring is defrosting a few conversations that have long stayed frozen in Formatland.

Let the MIPTV countdown begin. **TBI**

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

HIS ISLAND. HIS RULES. HIS GAME.
THE BANKER IS BACK

DEAL OR NO DEAL
ISLAND



COMING SOON TO  NBC



**EndemolShine
NorthAmerica**

We are Banijay



Banijay



Scripted Anthony Kimble

Getting your foot through the door in 2024

Anthony Kimble, CEO of Arrested Industries, explains how to get your drama pitch noticed in a cool US market

I think we'd all agree that 2023 was the content world's 'annus horribilis'. I certainly can't remember a time when so many things collectively went wrong, providing a proverbial perfect storm that will have a long-lasting impact on our business.

The post-strike feeding frenzy we all hoped for just didn't happen at the end of 2023 and commissions are not expected to bounce back anytime soon. Agencies and management companies have been advising against taking anything new to market as the buyers with slots to fill have only been reaching out to their network of trusted creatives with calls for very specific pitches.

So, how does a producer get their foot through the door in 2024 and make a lasting impression on US networks and platform executives inundated with pitches? Broadly, I think it comes down to a combination of the seven Cs: Connection, Content, Collaboration, Co-production, Casting, Circumstance – and Cojones!

Firstly, do your homework and find a connection. It sounds obvious but we producers can get so carried away with our brilliant idea that we forget this vital point. What is the network currently looking for? What's working well for them at the moment and why? And then, can you draw any comparisons with your own show? When Shonda Rhimes was pitching *Grey's Anatomy*, she knew what the executives wanted, so she linked it to HBO's *Sex And The City* and called her soapy hospital drama pitch *Sex In The Surgery* to pique the network's interest.

The content of your pitch must be on point. Prioritise getting the logline right. If you can't convey your story idea in a logline that's concise, intriguing and leaves your audience hungry for more, it's unlikely the rest of your pitch will land. You might even lose the execs' attention before you share your full pitch. LA network execs and agents have notoriously short attention spans. If you don't grab them in the first few minutes, you're done for.

The pitch, whether IRL or on Zoom, needs to be a performance, not a read-through. Make sure its content is punchy, not over-long, beautifully and interestingly presented, and, if possible, well-rehearsed... to the point (and excuse the contradiction) it looks spontaneous. And always aim to include the showrunner / lead writer so that execs hear their vision first-hand. If you are having conversations with other off-screen talent or have any

cast already attached, see if they can participate too. A-list names will always help open the door.

Collaboration is a major buzzword in the industry now and can work on many levels. In a pitch scenario, producers should, of course, demonstrate that they are collaborative and can work closely alongside executives. But collaboration can also help you get your foot in the door in the first place. It's more vital than ever before to build alliances to demonstrate that you are 'good people' to other producers, agents and industry insiders.

The right collaborators can be useful creatively but can also facilitate introductions, help convey your concept to others and generally improve the visibility of your project.

If you can't get in the door at a particular network/platform, do some research on the producers and projects that most align with your show and that have done well, and consider approaching them to see if they might be interested in co-producing with you. Working with an already-favoured producer is a great way to fast-track your pitch and get in front of the right executives.

Sometimes, the stars align, and other times, success needs a little help. Are there any other factors you can use to make your pitch more relevant or timely. Can you link it to a current news item, anniversary or subject trending in the zeitgeist? What falls on deaf ears today might attract attention tomorrow so keep alert and be ready to pounce.

Finally, every producer – however they might identify – needs cojones. Being bold and audacious can open doors in the first place and then, once there, ensure you are memorable. But make sure it's accompanied by charm, and you come across as confident, not arrogant.

And, if all else fails, have faith. After all, if you don't believe in your project why should anyone else? The showrunners of some of the most lauded shows of recent years can ably demonstrate this. Marc Cherry saw *Desperate Housewives* turned down by virtually every network before ABC picked it up; Mike White got passes from everyone before landing *White Lotus* at HBO; the Duffer brothers had *Stranger Things* rejected by close to 20 networks before Netflix came on board; and, before AMC picked it up, Matthew Weiner carried the pitch for *Mad Men* with him every day for seven years – just in case he ran into someone useful. Tenacity in this business, as in life, usually pays off in spades. **TBI**

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

FROM THE CREATOR OF **PEAKY BLINDERS**



THIS TOWN

ELECTRIFYING 6 x 60' DRAMA SET IN A WORLD OF FAMILY TIES,
TEENAGE KICKS AND THE MUSIC OF A GENERATION



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NEBULASTAR

BBC

Mercury
STUDIOS



Banijay



Legal Julian Wilkins

AI Regulation begins to get real

Our resident legal expert Julian Wilkins reveals that a busy year beckons for AI regulation

It is not just the awards ceremonies getting into their stride. The potential regulation of AI will be a dominant topic for the TV industry during 2024. Last year saw companies being sued for using third-party copyrighted material to teach AI systems and court decisions in some of those cases should occur this year.

The European Parliament and the Council presidency agreed in December 2023 the European Union Artificial Intelligence Act; arguably the world's first-ever comprehensive regulation on AI. Approval by the different EU member parliaments is awaited.

The EU AI Act will apply to EU AI providers and developers, but also to those located in other jurisdictions like the UK and US if their AI systems affect individuals residing in the EU. The Act aims to ensure the safety of AI systems and protect the freedom of the individual. Under the legislation, providers will need to comply with EU copyright law and provide detailed summaries about the content used for training.

The EU's legislation is more prescriptive compared to UK's less rigid approach, preferring individual regulators, like Ofcom, to develop suitable sector regulation.

The UK government has responded to the 2023 AI Regulation White Paper, detailing various initiatives to support individual regulators having the capability and skills to address the risks and opportunities of AI.

Key regulators have to publish plans by 30 April, 2024, addressing AI risks and opportunities. The Information Commissioner's Office has already updated data law guidance applying to AI systems.

Ofcom and the Competition and Markets Authority have until 30 April, 2024, to publish plans to manage the technology including identify current expertise, and plans for regulating AI over the year.

The government will provide funding including £10m (\$12.5m) to improve regulators' AI skills and develop research and examination tools to tackle risks and opportunities.

Funding includes for different initiatives such as an investment of £9m through the government's International Science Partnerships Fund, bringing

together researchers and innovators in the UK and the United States to focus on developing safe, responsible, and trustworthy AI.

Funding of £2m from the Arts and Humanities Research Council (AHRC) will support new research projects that will help to define what responsible AI looks for the creative industries and other sectors. These projects are part of the AHRC's Bridging Responsible AI Divides (BRAID) programme.

A further £100m will fund the world's first AI Safety Institute to evaluate the risks of new AI models. It remains to be seen whether the funding will curtail the development of malevolent AI.

Meanwhile, the House of Lords has introduced a Private Members' Bill around AI regulation. The purpose of this one is to regulate AI through a statutory 'AI Authority' whose function would include ensuring a consistent approach amongst regulators, coordinating relevant legislation such as privacy, consumer protection and safety laws.

The 'AI Authority' would regulate AI applications to ensure a number of qualitative criteria are met including safety, security, robustness, fairness, accountability and governance.

Further, it wants to ensure that any business that develops, deploys or uses AI should ensure thorough and transparent testing, as well as compliance with applicable laws including data protection, privacy and intellectual property. The Bill would regulate against discrimination whilst AI applications would have to be inclusive by design.

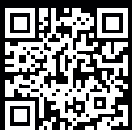
The Bill's provisions include transparency whereby the person involved in the training of AI must supply to the authority a record of all third-party data and intellectual property used in that training. The 'AI Authority' must encourage interoperability with international regulatory frameworks.

Whether the Bill receives government backing to make the statute books remains to be seen.

However, TV and the creative industries generally will be tuning into a long running legal series as the UK, EU, US and other lawmakers tackle AI impact on intellectual property rights, creative thought and freedom of expression. **TBI**

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

KAFKA



Blue sky thinking

As buyers hit London TV Screenings and Series Mania over the coming months, TBI talks to the bosses of more than 25 distribution companies to test the temperature of the global market & find out where their next deals are coming from



Earthbound, Keshet International



Rebecca Glashow, CEO, BBC Global Media & Streaming

What three words would you use to describe the state of the TV/streaming industry right now?

In flux, exciting, resilient.

What three words would you use to describe the state of the distribution sector right now?

Creative, flexible, opportunistic.

How do you expect global streamer demands for rights to change in 2024 compared with 2023?

We've already seen from deals being announced in the news that global streamers are becoming more flexible and open to discussion on rights, assessing each piece of content and its economics on a case-by-case basis. They are looking to further prioritise not only the titles they need but the rights they need on those titles.



Kelly Wright, MD of distribution, Keshet International

What three words would you use to describe the state of the TV/streaming industry right now?

Industry-wide metamorphosis.

Tell us in no more than two sentences about the biggest problem facing the distribution industry and what needs to change so it can be overcome.

1) (Excluding tape sales) The creation of new IP is extremely complex now. There are no straightforward, single-buyer deals anymore (and if you do land those rare deals, those buyers expect to scoop up all of the rights, sometimes without separate fees and premiums).

2) Human resources. If costs keep rising, then the natural reaction is to cut back on expenses – which means laying off your staff. Who is going to manage the IP then – acquire it, create it, manage it, program it, analyse it? We are basically playing right into the hands of AI.



Cathy Payne, CEO, Banijay Rights

What three words would you use to describe the state of the TV/streaming industry right now?
 Challenged, opportunistic, consolidation.

What is the single biggest difference in the discussions you're having with buyers today compared with 12 months ago?

A year on, it's safe to say that buying is more selective. The days of commissioning shows just to have volume are gone – it was never sustainable.

How do you expect global streamer demands for rights to change in 2024 compared with 2023?

I believe there will be a continued focus on broad audience entertainment in 2024, whether this is in the form of reality, factual or scripted content.

Where does opportunity lie for you in 2024?

Expanding new revenue streams for Banijay's burgeoning library and the successful relaunch of proven franchises.



Ruth Berry, MD of ITV Studios Global Distribution and Global Entertainment

What three words would you use to describe the state of the TV/streaming industry right now?
 Transitioning, tumultuous, exciting.

What three words would you use to describe the state of the distribution sector right now?
 Solid, resilient, evolving.

What is the single biggest difference in the discussions you're having with buyers today compared with 12 months ago?
 Exclusivity is less important to many buyers.

How do you expect global streamer demands for rights to change in 2024 compared with 2023?

They will buy more locally and regionally, and window within home markets.

Tell us in no more than two sentences about the biggest problem facing the distribution industry and what needs to change so it can be overcome.

Rising costs of deficits in nearly all genres are creating challenges and unprecedented risk in traditional funding models for TV. We all need to be more open-minded towards new funding models and partnerships to share the risk and keep our great industry buoyant.



Stefanie Fischer, MD of distribution, Off The Fence

What three words would you use to describe the state of the TV/streaming industry right now?
 Change, broken, relentless.

What is the single biggest difference in the discussions you're having with buyers today compared with 12 months ago?

They say less is more but there is strong evidence to suggest there's not more budget, slots or staff...

How do you expect global streamer demands for rights to change in 2024 compared with 2023?

I expect the trend of becoming a little more flexible about exclusivities to continue and the development and facilitation of more multi-partnership projects, which naturally opens up more funding routes and reach.



Rising Phoenix Universe, Off The Fence



Louise Pedersen, CEO, All3Media International

What three words would you use to describe the state of the TV/streaming industry right now?
 Cautious, risk averse, variable globally (some steady markets, some much tougher ones).

What three words would you use to describe the state of the distribution sector right now?
 Steady, prudent, tough for smaller distributors.

Tell us in no more than two sentences about the biggest problem facing the distribution industry and what needs to change so it can be overcome.

Financing UK shows – budgets are high, deficits are unrealistic at times. There is a lack of flexibility around UK secondary rights and co-producer needs, like day and date broadcast, isn't helping. More flexibility could free up more distribution cash.



Jens Richter, CEO of commercial & international, Fremantle

What three words would you use to describe the state of the TV/streaming industry right now?

State of reset.

How do you expect global streamer demands for rights to change in 2024 compared with 2023?

Traffic counts – the streamers are looking for mainstream programming with recognisable IP and talent.

Where does opportunity lie for you in 2024?

There are lots of opportunities for co-productions as well as local territory deals. There are also lots of opportunities around windowing and, of course, accelerating growth in FAST.

Tell us in no more than two sentences about the biggest problem facing the distribution industry and what needs to change so it can be overcome.

There is a disconnect between the inflation of budgets to make and finance shows, while platforms and broadcasters are having to act in a more cost-efficient way.



Emmanuelle Namiech, CEO, Passion Distribution

What three words would you use to describe the state of the TV/streaming industry right now?

Fragmented, in downturn, in transition.

What is the single biggest difference in the discussions that you are having with buyers today compared with 12 months ago?

Buyers' budgets are under increased pressure and their overall buying ability seems to be under additional scrutiny, or certainly subject to a much longer decision-making process.

How do you expect global streamer demands for rights to change in 2024 compared with 2023?

We have seen an increased flexibility in the rights that streamers insist on.

Tell us in no more than two sentences about the biggest problem facing the distribution industry and what needs to change so it can be overcome.

Offering must-have, cost-effective, yet compelling content that engages global audiences is pretty challenging at the best of times, but now more than ever. Adapting to market conditions is a must – as well as diversifying our sources of ideas and ways to reach audiences.



Paul Heaney, CEO, BossaNova

What three words would you use to describe the state of the TV/streaming industry right now?

Needing a hug.

What is the single biggest difference in the discussions you're having with buyers today compared with 12 months ago?

Buyers are being more forensic in their choices, so should distributors.

How do you expect global streamer demands for rights to change in 2024 compared with 2023?

More co-productions – or in plain English, they won't be buying global rights as much, preferring a local/regional approach – without doubt, everyone wants their money to go further.

Tell us in no more than two sentences about the biggest problem facing the distribution industry and what needs to change so it can be overcome.

It's very hard to encompass the whole industry as smaller and larger businesses have totally different set-ups. For smaller firms, the biggest problem is content pipeline but the solution is to focus rather than pivot and avoid fragmenting the message. For larger companies, it's about maintaining growth in a contracted market.



Rodolphe Buet, General Manager, Newen Connect

What three words would you use to describe the state of the TV/streaming industry right now?

Rollercoaster, disruptive, aggregation.

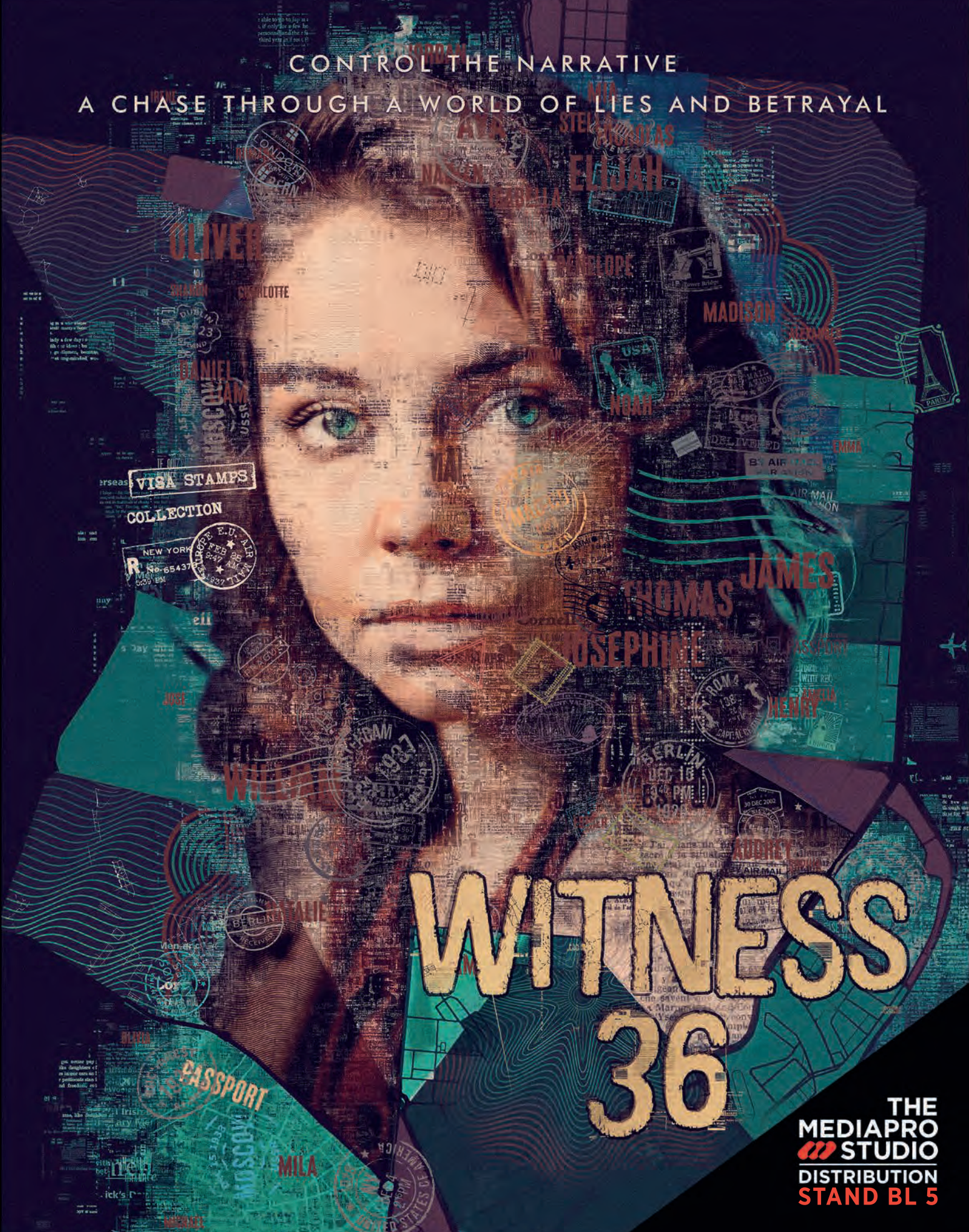
What is the single biggest difference in the discussions you're having with buyers today compared with 12 months ago?

We are increasingly involved in the early stages of a project. That's a major change in our relationships with our partners, in line with transformations in the market. Whereas we used to partner on ready-made programmes, today we think more in terms of development and pre-financing. This is the case with recent shows such as *Bel Canto*, *Cat's Eyes* and *We Come In Peace*.



In The Shadow, Newen Connect

CONTROL THE NARRATIVE
A CHASE THROUGH A WORLD OF LIES AND BETRAYAL



WITNESS 36

THE
MEDIAPRO
STUDIO
DISTRIBUTION
STAND BL 5



Gerbrig Blanksma, SVP of international sales & partnerships, Blue Ant Media

What three words would you use to describe the state of the TV/streaming industry right now?

Resilient, transitional, consolidating.

How do you expect global streamer demands for rights to change in 2024 compared with 2023?

We are seeing a lot more M&A and more flexibility. Clients are open to exploring new rights models and windowing strategies as a path to partnering on originals and pre-sales. We are also seeing global streamers sharing territory rights. A great example is *Davey And Jonesie's Locker*, where the series was co-financed with Hulu in the US and Amazon in Canada. Blue Ant co-financed the project and represents the series in the rest of the world.

Tell us in no more than two sentences about the biggest problem facing the distribution industry and what needs to change so it can be overcome.

Recently, we have observed a decrease in the number of distributors that channel partners deal with, so in order to be included in the list of preferred suppliers, it's crucial to have strong, established relationships with them and fortunately, Blue Ant has already built strong relationships and is positioned well to continue doing so with existing and new partners.



Poppy McAllister, head of TVF International

What three words would you use to describe the state of the TV/streaming industry right now?

Dynamic, evolving, turbulent.

How do you expect global streamer demands for rights to change in 2024 compared with 2023?

We foresee more global streamers looking to diversify, especially with SVODs looking to provide ad-supported alternatives and exploring FAST Channels. This could mean demand for thematic high volume series. Our flagship traditional factual genres of science, history and wildlife still prove high in demand, but elsewhere the interest in factual-entertainment genres such as crime, lifestyle and food continues to increase across the globe.

Where does opportunity lie for you in 2024?

We see huge opportunities in more co-production and pre-sale projects as we grow our team and raise our ambitions. We are constantly expanding our clientele, from an impressive expansion in MENA and Iberia, to a record year of sales across Central Eastern Europe.



Mark Young, EVP of distribution & networks for EMEA, Sony Pictures Television

What three words would you use to describe the state of the TV/streaming industry right now?

Fascinating, challenging, dynamic.

How do you expect global streamer demands for rights to change in 2024 compared with 2023?

It's evident that platforms are wanting to expand their ability to monetise their services and the content they've acquired, and so we are having certain rights discussions. I'd say that is probably the most notable change from last year.

Tell us in no more than two sentences about the biggest problem facing the distribution industry and what needs to change so it can be overcome.

As our partners continue to strive for viewers/subscribers and profitability, volume of content, funding models and cut-through continue to be key industry conversations.



Lisa Kramer, president, international content licensing, Paramount Global Content Distribution

What three words would you use to describe the state of the TV/streaming industry as a whole right now?

Evolving, fast-paced, exciting.

What is the single biggest difference in the discussions you're having with buyers today compared with 12 months ago?

Exclusivity has given way to co-exclusivity and/or exclusive windows are shorter.

Where does opportunity lie for you in 2024?

We just introduced our new brand destination area and this provides a new licensing opportunity for our third party partners to build on the Paramount+ branding within the comfort of a bespoke licensing deal.



Coma, Paramount Global Content Distribution

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Vanda Rapti, EVP of Viaplay Select & content distribution, Viaplay Group

What three words would you use to describe the state of the TV/streaming industry as a whole right now?

Fragmented, evolving, consolidating.

Tell us in no more than two sentences about the biggest problem facing the distribution industry and what needs to change so it can be overcome.

The true biggest problem is the straining media business and reduced available funds; but that isn't much under the distributors' control – and there is no point in talking about what will shift the whole industry, including inflation or available money spend on streaming or advertising.

So, distributors should look at what part of the problem is within one's control. For me, the answer is flexibility and openness for the buying platform and broadcasters' needs – but I am not sure I would like all distributors to catch up on that front.



Rick Barker, SVP of sales and acquisitions, DCD Rights

What three words would you use to describe the state of the TV/streaming industry right now?

Evolving, consolidating, cautious.

What is the single biggest difference in the discussions you're having with buyers today compared with 12 months ago?

In uncertain times, buyers can be risk adverse, so tried and tested shows, tentpole and returnable franchises with earlier commitment are a must.

Tell us in no more than two sentences about the biggest problem facing the distribution industry and what needs to change so it can be overcome.

Buyers are adapting quickly as viewers needs and habits change in an on-demand landscape, but on tighter budgets due to pressure on advertising and an over saturated market place. Distributors need to be nimble and flexible to react to a fast evolving distribution industry.



Thou Shalt Not Steal, DCD Rights



Guillaume Pommier (GP) & Monica Levy (ML), co-heads of distribution, Federation Studios

What three words would you use to describe the state of the TV/streaming industry as a whole right now?

Pragmatic, local, library. (ML)

What is the single biggest difference in the discussions you're having with buyers today compared with 12 months ago?

The market is getting traction again and, surprisingly enough, over the last two months we had three bidding wars on different programmes (including the amazing *Samber*), which shows that the buyers are active when content is good and well-marketed. (ML)

How do you expect global streamer demands for rights to change in 2024 compared with 2023?

1) Even more local than ever, 2) More library, 3) Less exclusivity, 4) Less money, but 5) ...more flexibility/co exclusivity. (GP)

Tell us in no more than two sentences about the biggest problem facing the distribution industry and what needs to change so it can be overcome.

Managing to pre-finance shows as much as possible in a landscape where commissioners/buyers, private or public, have less money to invest but with a growing appetite from audiences for big budget productions (mainly driven by streamer originals). (GP)



Anne Chérel, EVP of global sales and distribution, Studiocanal

With fewer shows being commissioned, how are you securing your pipeline?

Studiocanal owns the largest catalogue in Europe and one of the world's most prestigious libraries with more than 9,000 titles created across a century of production, so we are very fortunate to have many opportunities explore new projects. We aim to continue our journey with directors, writing and acting talent and to offer high quality programming across all formats with breakout series such as Xavier Giannoli's cinematic thriller *Of Money And Blood* and the first drama series from award-winning director Thomas Vinterberg, *Families Like Ours*, which is currently in post-production.

Where does opportunity lie for you in 2024?

Last year was Studiocanal's most ambitious in terms of production and one of our main priorities is to continue to increase our output during this coming year.

We are continuing to invest in projects with strong global appeal, as well as diversifying the use of our library via TV sales, formats, merchandising and gaming. Accelerating our IP development, particularly the growth and strengthening of our family IP alongside *MIFFY* and *Paddington*, is very important for us in 2024.



Will Stapley, head of acquisitions, Abacus Media Rights

What three words would you use to describe the state of the TV/streaming industry right now?

Challenging, restructuring, necessary.

What is the single biggest difference in the discussions you're having with buyers today compared with 12 months ago?

Budget freezes / restrictions across the board.

Tell us about the biggest problem facing the distribution industry and what needs to change so it can be overcome.

With a smaller pool of available new content coming through global production pipelines, there is more competition for third-party content and the larger groups will inevitably outbid the mid-sized and more boutique distributors. Production companies need to weigh up immediate funds vs long term distributor suitability for each project beyond 2024.



David Smyth, EVP of content sales & partnerships, Fox Entertainment Global

What three words would you use to describe the state of the TV/streaming industry right now?

Changing, collaborative, cautious.

What three words would you use to describe the state of the distribution sector right now?

In the spirit of alliteration: re-energised, rewired, remodelled.

Tell us about the biggest problem facing the distribution industry and what needs to change so it can be overcome.

The greatest challenge all global distributors face is adapting to today's fast-changing landscape, rather than how it was in 2019, when access to platforms and their viewers was much more centralised. Now, in the age of audience diaspora, we need to be determined, yet inventive and flexible, by forming new partnerships across the spectrum to find (and retain) these viewers as the variety of services they consume expands.



Agapy Kapouranis, president of international television & digital distribution, Lionsgate

What three words would you use to describe the state of the TV/streaming industry as a whole right now?

Transition, disruption, opportunity.

What is the single biggest difference in the discussions that you are having with buyers today compared with those from 12 months ago?

We're now in a very crowded marketplace. With more sellers than ever before shopping their series, it has become increasingly important to differentiate our content and ensure that it stands out among the competition. To cut through the clutter, we offer a broad range of noisy premium series, such as the highly anticipated *Spartacus: House Of Ashbur* series, a reboot of one of Starz's biggest original hits.

Where does opportunity lie for you in 2024?

The acquisition of Entertainment One (eOne) has enabled us to enhance our extensive television portfolio, bringing an even stronger content lineup to the marketplace.

In addition to adding network procedurals to our library, we also now offer an even broader array of non-scripted content following the launch of Lionsgate Alternative Television.

The division spans Pilgrim Media Group, Renegade 83, Blackfin, Daisybeck Studios and eOne's U.S. and U.K. unscripted groups, the labels responsible for hit series like *Naked And Afraid*, *Street Outlaws* and *Killer Inside: The Mind Of Aaron Hernandez*, to name a few.



Borderline, Lionsgate



Sarah Tong, director of sales, Hat Trick International

What three words would you use to describe the state of the TV/streaming industry as a whole right now?

Positive, accessible, expanding.

What is the single biggest difference in the discussions you're having with buyers today compared with 12 months ago?

VOD. These conversations are by no means a bolt from the blue but in the last 12 months they are now foregrounded as part and parcel of a linear broadcast deal, which adds windowing complications.

Tell us about the biggest problem facing the distribution industry and what needs to change so it can be overcome.

As consolidation grinds on, larger groups can acquire producers and distributors, which means content is locked in but not necessarily looked after. Servicing a 50,000-hour catalogue over one of 3,000 hours clearly comes with very different and sizeable challenges.



Tim Mutimer, CEO, Cineflix Rights

What three words would you use to describe the state of the TV/streaming industry right now?

Cautious, contracting, consolidating.

What is the single biggest difference in the discussions you are having with buyers today compared with those from 12 months ago?

Some buyers who had stopped buying for a while are starting to come back. Increasingly, we're finding that buyers are looking for sure-fire hits that can cut through in a landscape of fragmented audiences.

How do you expect global streamer demands for rights to change in 2024 compared with 2023?

There will be a greater focus on catalogue titles that already have currency with viewers. With fewer local commissions, they will look to acquire more content that appeals to local audiences.

Tell us in no more than two sentences about the biggest problem facing the distribution industry and what needs to change so it can be overcome.

Budgets and deficits are getting bigger whilst the market for some genres is contracting. We need to develop models that share and reward risk better.



Oliver Bachert, chief distribution officer, Beta Film

What three words would you use to describe the state of the TV/streaming industry right now?

Consolidating, streamlining, innovating (the need for innovative financing models).

What three words would you use to describe the state of the distribution sector right now?

Concentration, flexibility, efficiency.

What is the single biggest difference in the discussions you're having with buyers today compared with 12 months ago?

On the production side, there has been a widespread consolidation of national companies into larger national or European, fully integrated media conglomerates. This, paired with budget cuts and a shift in content, leads to a market situation that is very tense and highly dynamic. For us as a distributor, it is even more important to be agile, strategic, and forward-looking. Still, what remains utterly important is that content is key! Twelve months ago, there was a craving for captivating and authentic storytelling, and there is still today. We try to not lose the big picture, combine resources and potential, and beware of fast trends and tendencies in the industry.



Prentiss Fraser, president of TV distribution, Fifth Season

What three words would you use to describe the state of the TV/streaming industry right now?

Challenging, evolving, exciting.

What three words would you use to describe the state of the distribution sector right now?

Strategic, possibilities, dynamic.

What is the single biggest difference in the discussions you're having with buyers today compared with 12 months ago?

In general, a lot of companies are having conversations they are not used to having around single title acquisitions – but this has always been something we've specialised in doing. We're also seeing an increased focus from buyers on known IP and titles that have previously aired, so come with existing brand awareness built in.



Adam Barth, director of co-productions, acquisitions & development, Eccho Rights

What three words would you use to describe the state of the TV/streaming industry as a whole right now?

Contracting, challenging, 'reset'.

What is the single biggest difference in the discussions you're having with buyers today compared with 12 months ago?

Buyers are unquestionably more risk averse than they were a year ago.

Tell us in no more than two sentences about the biggest problem facing the distribution industry and what needs to change so it can be overcome.

On both ends of the spectrum, broadcasters and producers are becoming more reliant on distributors for bridging financial gaps. That's why we are so concerned with co-production, sharing the costs fairly and making sure everyone gets the best deal. **TBI**



Fallen, Eccho Rights



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London TV Screenings 2024

Our comprehensive guide to what is happening, where and when during London TV Screenings week

All week

Fifth Season

Venue: Fifth Season Office screening room, 7-10 Beaumont Mews, W1G 6EB
Genre(s): Scripted, Unscripted, Formats

Monday 26 February

BBC Studios Showcase

9am - 6.30pm
Venue: 180 Studios, The Strand, WC2R 1EA
Genre(s): Scripted, Factual

Tuesday 27 February

BBC Studios Showcase

9am - 6pm
Venue: 180 Studios, The Strand, WC2R 1EA
Genre(s): Factual and Global Entertainment incl. Scripted and Unscripted Formats

Viaplay Content Distribution

8.45am - 12pm
Venue: Soho Hotel, 4 Richmond Mews, W1D 3DH
Genre(s): Scripted, Unscripted

Beta Film

9am - 12pm
Venue: The Ivy Club, 9 West St, WC2H 9NE

NBC Universal Formats

12am - 12pm
Venue: Central St Giles, WC2H 8NU
Genre(s): Formats

Studiocanal

12pm - 4.30pm
Venue: Ham Yard Hotel, 1 Ham Yard, W1D 7DT

Paramount Global Content Distribution

2pm - 5pm
Venue: Bafta, 195 Piccadilly, W1J 9LN
Genre(s): Scripted

Newen Connect

3pm - 4pm (Factual)
 4pm - 6.30pm (Scripted)
 6.30pm - 8pm (Cocktails)
Venue: Soho Hotel, 4 Richmond Mews, W1D 3DH

Off The Fence

4pm - 6pm
Venue: Curzon Soho, 99 Shaftesbury Ave, W1D 5DY
Genre(s): Factual

TVF International

4pm - 6pm
Venue: Icetank, 5 Grape St, WC2H 8DW
Genre(s): Factual

Hat Trick Int'l & DCD Rights

4.30pm - 8pm
Venue: Vue West End, 3 Cranbourn St, WC2H 7AL

Abacus Media Rights

6pm - 9pm
Venue: Charlotte Street Hotel, 15-17 Charlotte Street, W1T 1RJ

Wednesday 28 February

Banijay

9am - 1pm
Venue: Bafta, 195 Piccadilly, W1J 9LN
Genre(s): Scripted, Factual

ITV Studios

11am - 6pm
Venue: Odeon Luxe, Leicester Square, WC2H 7LQ
Genre(s): Formats, Unscripted, Scripted

Keshet International

12pm - 3pm
Venue: Soho Hotel, 4 Richmond Mews, W1D 3DH
Genre(s): Scripted
 3pm - 5pm
Genre(s): Unscripted

Banijay

2.30pm - 4pm
Venue: Bafta, 195 Piccadilly, W1J 9LN
Genre(s): Formats

Passion Distribution

3.30pm - 6.30pm
Venue: The Groucho Club, 45 Dean St, W1D4QB
Genre(s): Documentaries, Factual Entertainment

Lionsgate

5pm - 7pm
Venue: Ham Yard Hotel, 1 Ham Yard, W1D 7DT

Eccho Rights & Bossanova

7pm - 10pm
Venue: The Century Club, 61-63 Shaftesbury Ave, W1D 6LQ
 (Cocktail Party)

Thursday 29 February

Federation Studios

9am - 12.30pm
Venue: Soho Hotel, 4 Richmond Mews, W1D 3DH
Genre(s): Drama

WBITVP

9.30am - 12pm
Venue: Bafta, 195 Piccadilly, W1J 9LN

Dogwoof

9.30am - 12pm
Venue: Soho Hotel, 4 Richmond Mews, W1D 3DH
Genre(s): Documentaries

All3Media International

12.30pm - 4.15pm
Venue: Odeon Luxe, Leicester Square, WC2H 7LQ
Genre(s): Scripted, Unscripted, Formats

Disney

12.30pm - 4.30pm
Venue: Curzon Soho, 99 Shaftesbury Ave, W1D 5DY

Fox Entertainment Global

1pm - 4pm
Venue: Charlotte St Hotel, 15-17 Charlotte St, W1T 1RJ

Cineflix Rights

3pm - 6pm
Venue: Soho Hotel, 4 Richmond Mews, W1D 3DH
Genre(s): Scripted, Factual

*Sony Pictures Television

4.30pm - 5.30pm
Venue: Picturehouse Central, W1D 7DH
Genre(s): Scripted then, 5.30pm - 9pm
Venue: Ham Yard Hotel, 1 Ham Yard, W1D 7DT
Genre(s): Unscripted, Formats

Blue Ant International

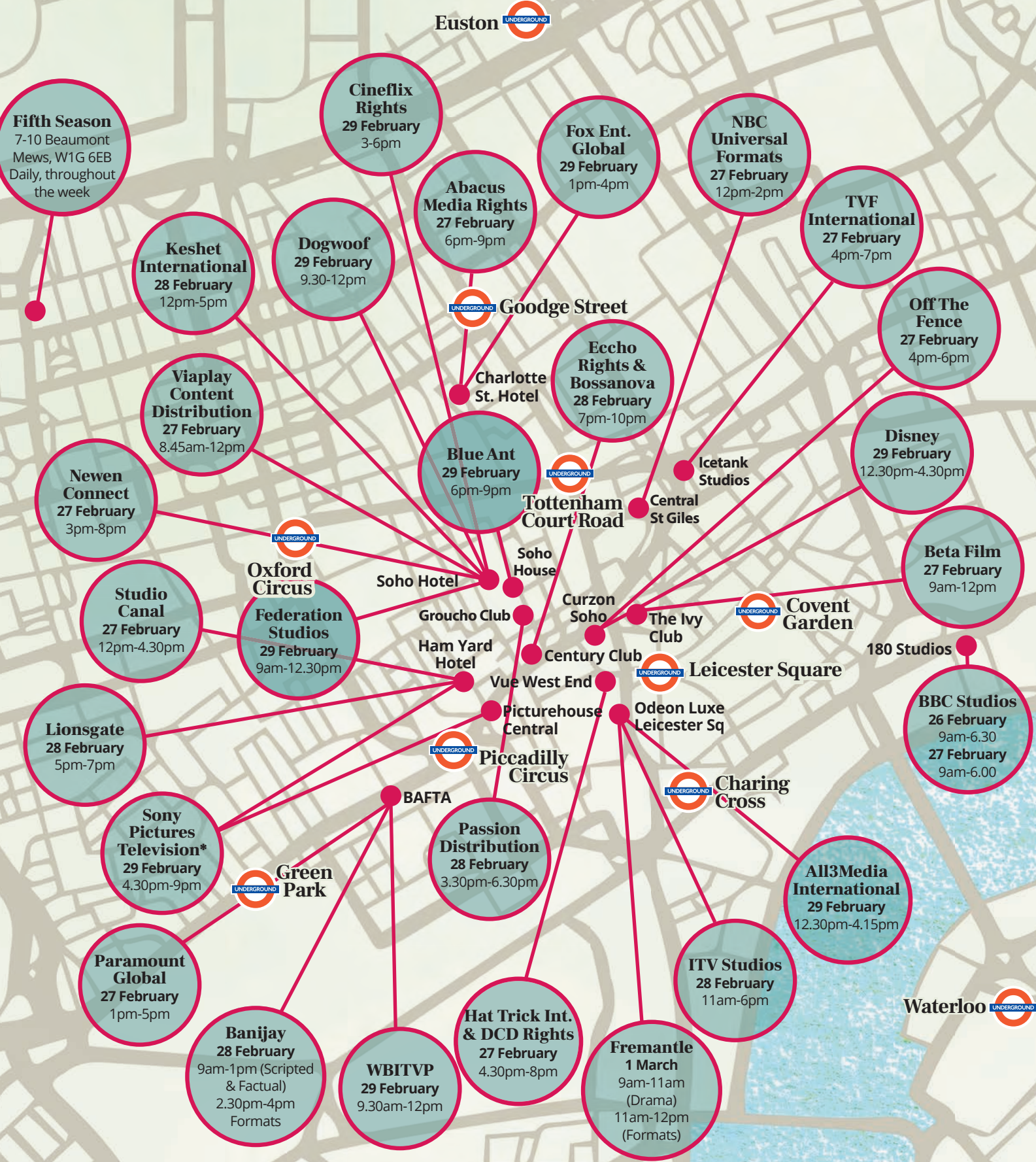
6pm - 9pm
Venue: Soho House, 76 Dean St, W1 3SQ
Genre(s): Factual, Factual Entertainment & Scripted

Friday 1 March

Fremantle

9am - 11am
Venue: Odeon Luxe
Genre(s): Drama, Documentaries
 11am-12am
Venue: Odeon Luxe West End WC2H 7DX
Genre(s): Formats

*Check with organisers as events may be invitation only



Immerse yourself

With Apple TV+ recently adding immersive originals to its lineup, Mark Layton delves into the opportunities, financial models and potential return on investment for producers that make the quantum leap into VR content

Virtual reality and immersive content have, for the best part of a decade, remained largely within the province of gamers and exhibition attendees.

But there are changes afoot that signal new opportunities on the horizon for producers, particularly of factual content, who are willing to venture into the third dimension.

Streaming service Apple TV+ revealed in January that it was adding a selection of original immersive programming, specifically for its tech giant owner's new Vision Pro mixed reality headset.

Its initial line-up includes *Prehistoric Planet Immersive*, a short film based on the existing Apple TV+ dinosaur show from Jon Favreau, and Atlantic Productions' *Adventure*, which allows viewers to experience footage as though they are joining extreme athletes in remote locations.

Disney+ is getting in on the action too, with some 'environments' based on locations from IP such as *Star Wars*, *Monsters Inc* and *Marvel's Avengers* to explore,

as well as some more straightforward 3D versions of movies like *Elemental* and *Encanto*. Mouse House CEO Bob Iger enthused on the ability of the Vision Pro to bring viewers closer than ever to Disney content.

However, as big a step as this might be for Apple TV+, even its new originals remain in 180-degree 3D 8K – resembling something closer to a more traditional TV viewing experience. But some producers have been working with fully 360-degree productions for some time now, transporting viewers right into the middle of their shows and documentaries.

There are advantages and, crucially for some, unexplored revenue streams available once they take that step into virtual reality.

Demand exceeds supply

Briege Whitehead, founder and creative director at Australian factual indie White Spark Pictures, has feet firmly in both the 2D and 3D worlds.

She founded the firm in 2017, with the company



White Spark Pictures has taken VR doc *Beyond The Milky Way* to venues in Europe and Australia

made up of two divisions: one producing factual content for the international TV market and one focused on VR, immersive and interactive films.

White Spark's credits include factual TV shows *Impossible Planet* and *Poisonous Liaisons*, as well as feature-length doc *The Last Horns Of Africa*.

On the immersive side, White Spark launched the Brian Cox-narrated VR documentary *Beyond The Milky Way* last year, following the global effort to build two of the world's largest radio telescopes and virtually transporting viewers across the stars.

Meanwhile, 2018's *The Antarctica Experience* gave audiences the chance to 'visit' one of the world's most remote locations, with the film accompanied by a 2D companion doc, *The Real Antarctica Experience*.

"We've got an entire VR slate and we have an entire TV slate, and many of those things crossover, especially because we're gaining access to some locations that have never been captured on camera before," Whitehead tells TBI.

"If we're already getting the budgets for these productions through our VR side of things, why would we not also be trying to do a lot of those things in television?"

She adds: "Producers should look very seriously at if they want to finance their productions [in both 2D and 3D] and then you come out with two very commercial, highly marketable productions that are fit for television and VR."

Whitehead says that the "economy of scale is really affordable" when shooting in VR, as well as the more traditional 2D.

"We're finding it's usually between a 15% to 30% increase on budgets to be able to do both," and that "you'd be more than getting that back" by selling the two different productions "even if you just released it in Australia and New Zealand."

On the practical side, Whitehead explains: "Your pre-production is largely the same. In production, VR doesn't take a huge amount of time – we shot all of *The*

Antarctica Experience in two weeks with a crew of three people in the field.

"It's more on the post-production side of things where costs really do start to come in. It's very hard to fix it in post – even harder than usual."

However, the opportunities are there for VR content, with Whitehead revealing that, at least for White Spark, demand is exceeding their supply.

"Our current demand, just in Australia and New Zealand, is 10 VR films a year and currently, we can only keep up with one."

Buyers are also increasingly willing to contribute to the budget, and while the likes of Apple, Meta and Pico have been partnering with content producers for a home headset experience, much of the business is to be found with venues such as museums and cinemas.

"Originally, we were coming up with the entire budgets ourselves and then putting them into museums. Now we're seeing the museums and the venues put in money for the budgets. So we've created entirely new pathways to audience and entirely new pathways to revenue," says Whitehead.

"We deliberately haven't been putting our films online yet because the demand is there in shared mass experiences. If I had a lot of money, I would buy and manufacture my own VR headset."

Instead, in November, White Spark launched Surround Sync, a new tech business that aims to allow hundreds of viewers to experience virtual reality productions at the same time, with Whitehead serving as CEO of the new venture.

It aims to be a cost-effective solution for cinema operators, sidestepping the need for significant investment while leveraging existing cinema venues and infrastructure.

Producing for mass appeal

Working purely in VR and immersive content is Paris-based Targo Stories, founded in 2017 and with documentaries available for home consumption via Meta and Pico platforms, as well as Viveport and YouTube VR.

Co-founder and CEO Victor Agulhon says that his aim is to make immersive content that is "meaningful for mainstream audiences," noting that the relatively few headsets that are being used – and the high price point barrier for entry – means content must "speak to everyone" to cut through.

Indeed, according to research firm Statista, the number of VR headsets sold worldwide is expected to surpass 34 million in 2024. Not a small figure, but a drop in the ocean compared to the more than 1.7 billion TV sets in the world.



“You come out with two very commercial, highly marketable productions that are fit for TV and VR”

Briege Whitehead,
White Spark Pictures



Targo Stories' most recent immersive documentary is *JFK Memento*, recounting the 1963 assassination of US president John F Kennedy.

The title features narration from witnesses, journalists and investigators, and brings them to life by virtually placing viewers in 360-degree recreations of key locations, such as Dealey Plaza and the Texas School Book Depository, overlaid with images and footage of the events of that day.

Previous Targo docs include *Surviving 9/11*, about the 2001 Twin Towers attack; *Solo To The South Pole*, following polar explorer Matthieu Tordeur; and culinary title *Behind The Dish*.

“We pick a moment that most of us have already seen on a traditional TV, but we want to show how immersion can give you a new perspective on all these stories,” says Agulhon.

“History is one side for us, the second is entertainment stories, and we’ve done documentaries on someone crossing to the South Pole on his own, and a sort of *Chef’s Table* in VR, in which you get to dive into the behind the scenes of the cooking world.”

Agulhon believes the home consumption market is set to grow over the coming years, with devices like



Targo Stories' latest doc, *JFK Memento*, puts viewers on the ground of the 1963 assassination

the Vision Pro marketed as a spatial computer, rather than a gaming device. That could open up a whole new audience to VR.

“We are seeing an evolution that’s ongoing right now,” explains Agulhon. “I think VR headsets are going to be shifting progressively from being a gaming-oriented platform to being a mainstream media consumption platform.”

What producers need to focus on is supplying the demand for quality immersive content that will draw consumers to these devices, he says.

“Our most-watched documentaries have millions of views in VR, so you can reach a serious and real audience when you have the right topic that’s treated in the right way.”

Co-producing with venues

Once producers have made that leap into VR content, they need a distributor that knows the terrain – and that’s where firms like Lucid Realities, come in.

The producer-distributor, also based in Paris, specialises in location-based experiences, rather than the home market, with Alexandre Roux, head of distribution, suggesting that the current usage of personal VR headsets is for “like 90% gaming content.”

Instead, Lucid Realities has worked with cultural venues, such as the Louvre and the Musée de l’Orangerie in Paris, the Casino Luxembourg, and the Serpentine Galleries in the UK, involving them in the early stages of their immersive experiences.

“We sign many co-productions with huge cultural institutions. It’s a way to greenlight a first showcase, and that’s really important to then [be able to] promote the projects overseas and to target, other venues in the international market.”

The company’s distribution arm, Unframed Collection, has meanwhile developed an online platform for producers to more easily sell their immersive content worldwide.

“They submit their programs to the platforms, we will do an editorial and technical check, and then we will publish the programs in the platform,” explains Roux.

“We propose two different business models to the cultural venues. The first one is a pay-per-minute system. We can get all the screening data from the venues sent to the platform and will automatically generate revenues. We will get 30% as sales agents and we will redistribute 70% to the company’s copyright holders.

“The other business model is a flat fee based on an estimate we do in collaboration with the copyright holders,” says Roux.

While moves into immersive content are being made by platforms such as Apple TV+, it might be small steps rather than giant leaps for the moment. Unless 2024 becomes the unlikely year of sky-rocketing VR demand from streamers, we aren’t quite on the cusp of an explosion in home consumption.

Nevertheless, quality content is in demand from existing VR platforms like Meta Quest TV, while museums, institutes and other cultural venues are loosening their purse strings to innovate their offering and provide a more natural home for some of these augmented experiences.

There is opportunity to be found, for producers willing to rethink where – or where else – their content might be placed and if that extra cost is worth the return. **TBI**



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Navigating choppy waters

Streamers fuelled a booming scripted sector in the US and across Europe, but with spending tightening, Richard Middleton explores the scripted industry's next moves



Anyone hoping that the start of 2024 would bring blessed relief from the storm of the last 12 months is likely to have been left disappointed.

While 2023 spiralled into something to forget for swathes of the industry, the current year has not shied away from starting with a bang of its own. Companies of all flavours are in cost-cutting mode – Disney is slashing jobs at Pixar, UK broadcaster Channel 4 is overhauling its structure and Paramount is firmly in the retrenchment game.

Its CEO, Bob Bakish, confirmed in January that around 800 lay-offs were on the cards, with its teams in the US and those looking towards a more international horizon subsequently affected towards the middle of February.

Blame for the cuts was put on “a soft ad market, a volatile macroeconomic environment and two historic strikes,” Bakish said, factors that can be applied to almost every company as much as Paramount. And alongside the lay-offs has come a re-evaluation of content priorities, with a refocusing on “Hollywood hits” that have the “biggest impact”.

It means Paramount will produce “fewer local, international originals” for its platforms, but there’s a silver lining of sorts. The

company also owns networks in Australia (Network Ten), Argentina (Telefe), Chile (Chilevisión) and the UK (Channel 5), all of which will “continue to have a strong pipeline of local content.”

This re-evaluated strategy neatly highlights the fluxing nature of today’s scripted industry and reflects how the swaggering US streamers that were flooding the market with cash just 18 months ago are now scrabbling to recoup whatever they can. Much-publicised Disney+ original *Nautilus*, for example, was pulled in August last year by the Mouse House bean counters and flogged off to AMC Networks in the US, while *The Spiderwick Chronicles* found a new home on Roku. Needs must when you need to slash content costs by around \$1.5bn.

And yet, as Wayne Garvie points out, the industry is not all doom, gloom and kaboom. Streamers are still spending tens of billions on content excluding sports rights; public broadcasters have relatively stable coffers into which they can dive; and more importantly the industry is adept at navigating budget squeezes. It’s happened before, after all.

“As producers, we have come through a real ‘boom’ era of ever-expanding budgets which have accompanied the proliferation of new platforms popping up all over the place,” Garvie tells TBI.

“Now the wheel is turning again, but we are still going to be left

with a drama market substantially bigger in scale and ambition than anything that existed ten years ago, as well as an audience that is much more sophisticated and global in its tastes,” adds Garvie, who has been behind shows ranging from *Sex Education* and *The Crown* to *My Life With The Walter Boys* in his role as Sony Pictures Televisions’ president of international production. Worth noting that that trio are also all Netflix shows.

Indeed Garvie’s company has, probably better than any other of the US majors, navigated the boom to great effect. It famously did not enter the streaming wars and now, with Netflix sitting pretty, is neither burdened with giant debts nor desperate for consolidation.

“From a production perspective we have to realise that for the next few years, cost will be crucial,” Garvie continues. “Those inflated global budgets are going to be increasingly hard to find, but producers who can make premium drama at a more compelling price are going to find this could be a wonderful new era.”

Kollegial thinking

While US scripted product might have the pulling power of Hollywood behind it, European producers are the ones that are most adept at creating “premium drama at compelling price points”, as Garvie puts it.

Part of that is because of the nature of the European landscape and its make-up. Budgets have never been as big across the continent as they were on the other side of the Atlantic, and in these leaner, meaner times, that’s good news.

One timely example comes in the form of *The Kollektive*, an upcoming thriller that was first unveiled in 2022 and which has The Alliance – the public broadcaster triumvirate made up of France Télévisions, Italy’s Rai and ZDF in Germany – onboard.

Earlier this year it emerged that the show had also attracted A+E Networks as distributor, along with a US-based buyer in the form of Hulu. The 6 x 60-minute drama is now in production, tracking the story of an intrepid group of young citizen journalists as they travel from Budapest to St. Petersburg and London amid a globe-spanning web of government lies and corruption.

The show is from Mediawan-owned Submarine (*Undone*) and was created by *Gomorra*’s Leonardo Fasoli and Maddalena Ravagli, along with the prodco’s Femke Wolting, who was also instrumental in moving the show from script to screen.

“We received the greenlight in 2022 for the writing phase and in 2023, we received the production greenlight,” she tells TBI.

“During the writing phase, we worked on finalising the budget and closing the financing. We partnered with A+E as a distribution partner and eventually attached Hulu in the US. In the Netherlands, Videoland became a partner for the series and we received financial support from Creative Europe.”

The show is being shot in Hungary, Belgium and the Netherlands – meaning tax incentives can be employed – and Wolting’s Submarine (which has produced *Undone* for Amazon and Richard Linklater’s

Apollo 10 1/2 for Netflix) is working on the FX for *The Kollektive*.

“There are tax incentives in Belgium and the Netherlands, and by keeping the whole production in-house we can keep the creative vision complete.”

For those looking for a recipe of how to get bigger budget drama off the ground, look no further. It is in many ways a throwback to a decade or so ago, when budgets were pulled together piecemeal and co-productions ruled supreme.

Putting co-pros into context

Much has been made of the return of the co-production but in truth it has never been away – such models have been in play throughout the streaming boom to some degree. The difference now is that the model is so necessary, but also that the scope of spending is far greater than a decade ago when the copro was a go-to for producers filling budgets.

One key challenge of the co-production model is reaching critical mass, of ensuring you can scabble together a big enough budget to get the thing moving to secure more investment and then get it into flight, rather than striking lucky with one global streaming deal.

“Getting these more extensive international series off the ground might be more difficult in the current climate,” admits Wolting. But she points to another change in the market compared to a decade ago: the demand for international drama.

“We believe viewers want to see authentic and substantial character-driven stories, and viewers are now more than ever used to watching series from Korea to Europe to Latin America. I don’t think that viewing behaviour will now all of a sudden change.”

And as for the challenge of getting the co-production together, there are now numerous co-commissioning buyers that are looking to get more bang for their Euro. The Alliance has been around shows such as *Germinal*, *Around The World In 80 Days*, *Leonardo* and *The Swarm*, which Beta Film and ZDF Studios subsequently sold to The CW.

Then there’s the Nordic 12 and the more nascent New8 – ZDF (Germany), NPO (The Netherlands), VRT (Belgium), SVT (Sweden), DR (Denmark), YLE (Finland), RÚV (Iceland) and NRK (Norway) – all now potential options for producers seeking a more significant budget hit.



The Swarm (opposite) and *The Kollektive* (right) are both scripted commissions from The Alliance that have US buyers

For Rai, the attractions are clear. “The projects of The Alliance give us the possibility to be part of endeavours that we would never have been capable to tackle alone,” Michele Zatta, Rai Fiction commissioning editor of international co-productions, tells TBI.

“The negative aspect is that they’re usually pretty expensive. And since we have the smallest budget we have to be careful in choosing not too many – and the right ones for our audience.”

There also seems to be a shift in the balance of commissioning



“Viewers want to see authentic and substantial character-driven stories – I don’t think that viewing behaviour will now all of a sudden change”

Femke Wolting, Submarine

power, partly with US streamers’ spending priorities less focused on international fare, but also because the collective might of European pubcasters and soft money adds up.

“It is true that we’re experiencing a pendulum movement,” says Morad Koufane, head of international drama at France Télévisions. “We’ve been receiving a lot of abandoned developments from the streamers that rediscover their purpose and the added value that we can offer to creators and talents.

“For the next two years, I guess our role is to be present for the creators and to be ready to commit to talents that have something to say through the [public service broadcaster] lens. One cannot substitute the crazy amount of ‘peak TV’ money, but the Alliance can be the new Eldorado for meaningful entertaining projects that are increasingly leaving the streamers.”

The Kollektive, of course, ticks that ‘meaningful entertainment’ box and Frank Seyberth, head of co-production at ZDF’s International Fiction unit, adds that his organisation’s public broadcaster status also reflects stability in a time of uncertainty.

“As a public broadcaster, our editorial line is always shaped by a multitude of factors, such as relevance, social and financial needs, as well as public demand. In this sense we see ourselves as a stable and reliable partner for our producers in an especially fast paced market.

“We are alert to how quick some market players have been changing their behaviour and investments. Even so, we believe strongly in the benefits of a sustainable and trust-based slate development over a longer timeline with reliable partners. This will attract the best talent and result in (commercially) viable projects.”

Distribution partnerships

Reliable partners also come in the shape of a show’s distributor, a vital part of the machinery and never more so than now. ITV Studios’ Ruth Berry points out that rising costs of deficits in nearly all genres “are creating challenges and unprecedented risk in traditional funding models for TV.” The key for her is “to be more open-minded towards new funding models and partnerships to share the risk”.

Patrick Vien, group managing director of international for A+E, tells TBI that *The Kollektive* appealed because it offers cut-through and will “strike well above its weight creatively”, with its sale to Hulu seemingly a fair indicator on that front. The cost of the show has not been revealed, but Vien says it is “definitely healthy”.

He is also broadly bullish about the global scripted market, pointing to the billions that continue to be spent despite the pull-back, but admits that “whoever’s deploying capital in scripted is going to be doing so more strategically than ever and they’re going to be more careful with the amount of capital they’re deploying than ever before.”

“We definitely went through a period of time where there were simply no rules,” Vien says. “Now, there’s a very grounded approach, but it’s still an extremely exciting time for scripted – I think we had a period of time where there was way too much and consumers reacted to that, so this correction is justified.”

Certainly, the collective intake of breath that the entire industry has been taking of late seems to be constricting supply, although there seems at present little correlation between production cost inflation and the softening of commissioning budgets.

With macroeconomic inflation also at play, determining when – if at all – production costs will decline is the stuff of crystal ball gazing. But as Wolting highlights, “there are many opportunities for European drama producers as we are able to produce high-quality series for a cost-effective budget that now have the potential to reach a global audience.”

There is also increasing incoming interest from US talent, she adds,



Around The World In Eighty Days hails from co-production collective The Alliance – ZDF, Rai & France Télévisions

with Submarine currently producing *Safe Harbor* by Mark Williams (co-creator of *Ozark*). Her prodco financed the show in the Benelux and now hopes to sell it internationally.

And as Vien points out, streamers are “going to maintain a strong – a very strong – position in the marketplace. If we can prove it out [with *The Kollektive*]... we can show that elaborate collaborations can absolutely work.

For Garvie, market conditions are also offering “an opportunity for these various European free-to-air and PSB’s to engage creatively together” to secure scripted shows that would previously have gone to a streamer. “It can reenergise both those buyers and a distribution industry that was being sidelined by global buying models,” he says. Perhaps calmer waters aren’t that too far off, after all. **TBI**

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Fighting fit

Format reboots are proving more popular than ever, with a slew of both recent and iconic titles finding new or extended life. Andy Fry delves into this revival trend to see what's next

The global format business is so diverse and dynamic that predicting its direction of travel is like forecasting next month's weather. But as 2024 grinds into gear, it looks as though this year will be all about bankers, big swings and 360-degree exploitation.

'Bankers' isn't an oblique reference to the return of Banijay's *Deal Or No Deal* on ITV in the UK. It is recognition that the format business is more reliant on proven formats than ever. Laura Burrell, VP of international formats at Paramount Global Content Distribution, highlights that the "big trend" is the revival of classic formats, because buyers want shows that "can be relied on to deliver."

This is evident in the recent renewal of social experiments like *Big Brother* (Banijay), reality series like *Real Housewives* (NBCU) and physical competition formats like *Gladiators* (MGM). But if there's one corner of the market where reboots are especially hot, says Burrell, "it's game shows."

Examples include a refresh of Fremantle's *Family Feud* in Mexico

and the return of Sony Pictures Television's *Jeopardy* and *Wheel Of Fortune* – both managed by Paramount. "These shows are really working," says Burrell. "They are fun, they encourage co-viewing and they can be played along at home."

Aside from being safe bets, they are also cost-efficient and flexible, adds Burrell, a major plus point in these difficult times. *Jeopardy*, for example, can be used as a primetime or daily show and lends itself to hubbing. Last year, a UK version (for ITV) and an Australian version (for Nine Network) were shot back-to-back in Manchester. Two seasons of the Swedish version were also shot one after the other.

Narrowing the odds

Reboots are often characterised as a failure of nerve by broadcasters, but Burrell stresses that getting them to land with a new generation of viewers is not a foregone conclusion. "They're a safer bet, but they're not a guaranteed hit. Part of the reason *Jeopardy* and *Wheel Of Fortune*

Gladiators (opposite) recently returned to UK screens on BBC One, while *The Traitors* (below, right) has been a big success for M6 in France

broke through in the UK is because we managed to attach great hosts (Stephen Fry and Graham Norton, respectively).”

Ninder Billing, VP of unscripted international co-productions at A+E Media Group, agrees that classic formats are in vogue but that they need to be adrenalinised to succeed.

“Shows like the BBC’s new *Gladiators* are delicious and delightful co-viewing,” she says. “What *Gladiators* shows is how invigorating an existing format can give it a fizzing energy.”

Billing also notes a new twist to the trend that has brought audiences celebrity and junior versions of shows. “At Realscreen this year, there was a buzz about ABC/Hulu’s *The Golden Bachelor* and that got us thinking about what we can do in the ‘golden’ space to serve the audience that came to [that show].”

Reboots only tell one side of the story, however. Broadcasters and platforms also need to take risks, making the ‘big swings’ that define schedules. Celine Cauderlier, director of production and development at M6 content division Studio 89, says reboots “are immediately identifiable, they bring back emotions and memories, viewers trust them. But for how long? That’s why we also need to be innovative with new formats.”

The big success for M6 has been *The Traitors*, which Cauderlier describes as “immediate, addictive and visually mindblowing,” adding that it “perfectly represents what we are looking for when adapting or creating a format.”

Keep it simple

Cauderlier says a key strength is that the show tells “a simple but intriguing story, almost everything you have to know is in the title. With more and more content available, viewers need to immediately identify what they will get out of a format.”

The Traitors is proof that the right idea can still blow up into a global hit, even in an era of risk aversion. Billing calls it a “juggernaut”. And while A+E continues to place great store by its own power-brands such as *Alone* (recently licensed to SBS Australia), she says: “We’re also acquiring and investing in new formats – entertaining smart formats that offer an authentic approach to a universally relatable theme.”

The Traitors is not the only relatively new format to have captured buyers’ attention over recent years, with formats such as *Too Hot To Handle*, *Lego Masters*, *The 1% Club* and *Beat My Mini-Mes* also breaking through.

The latter, from Fox Alternative Entertainment, features celebrity singers facing off against each other while surrounded by children all wearing the same outfit.

One fan is Carmen Ferreiro, Atresmedia’s entertainment programme director, who acquired the format for Antena 3 in Spain and describes it as “an extraordinarily original show that fits perfectly with a family and entertainment channel such as Antena 3.”

For Ilanit Siman-Tov Hirsch, head of programmes and acquisition at Keshet Media Group, the key is to embrace the yin and yang of bankers and big swings.

Bankers include *Dancing With The Stars* for Keshet 12 and *Rising Star*; and Hirsch points out that “the combination of a singing competition show with finding the talent to represent Israel in Eurovision really works for us.”

Risk & reward

Keshet is also testing out newer formats too, however, with *The Masked Singer* debuting in recent years and *The Traitors* set to launch.

“We have produced Israel’s first season of *The Traitors* - it’s not broadcast yet, but the outcome is brilliant. We have a slot reserved for reality shows like this – we’ll test it out with our first season of *The Amazing Race*.”

Trendwise, Hirsch is seeing “many copycats of *The Traitors* but I’m not sure how long it will last. I’m sure we’ll see more and more formats circling around in this area, but I don’t know if it will have the same longevity as *Big Brother* or *Dancing With The Stars*.”

“Reboots are immediately identifiable, they bring back emotions and memories, viewers trust them. But for how long?”

Celine Cauderlier, M6’s Studio 89



Hirsch agrees that cost effective game shows “are in their beauty hour” but points out that not all territories share the same taste.

“We’re seeing lots of attempts to find the next hit game show, but in Israel they are not working particularly well. Our focus is on talent shows, shiny floor entertainment formats and special live events – which allow us to fight for the viewers’ attention, in the way that live sporting events do.”

While some of these newer, heavyweight formats highlight that some new ideas are coming to market, the pursuit of big swings doesn’t mean buyers are willing to snap up ‘back of a napkin’ ideas.

Often, the job is more about turning over a thousand stones in the



search for gems that can be scaled up into global phenomena. Burrell describes deep dives into the archive for half-forgotten shows (eg *The Joe Schmo Show*) and blowing up segments of shows into full scale formats – as happened with *Carpool Karaoke*, *Lip Sync Battle* and, most recently, *The Line Up*.

The latter, she says, was transformed from a short segment on *The Late Late Show* into a two-hour programme on France’s TF1.

Powering up co-creation pacts

Korea’s success with formats such as *The Masked Singer* continues to pay dividends, with format businesses looking to mine Asian creative genius in search of global hits and untapped IP. Fremantle has just optioned Seoul-based Something Special’s *Battle In The Box* for several markets, while Nippon TV’s *Silent Library* (originally a segment on Japanese TV) has just been picked up by RTL+.

East-West relations are typically characterised by co-creation – rather than the classic buy/sell model. Nippon TV director, global business, Yuki Akehi, says her company has enjoyed success with local adaptations of *Are You Smarter Than A Fifth Grader?* and *Doctor Foster* (a scripted series from the BBC).

Right now, Akehi says the company is collaborating on “a super fun game show format called *Koso Koso*, with BBC Studios and Empire of Arkadia,” with a pilot airing successfully on Nippon TV.

Akehi believes the prank show is indicative of a trend towards supporting “the greater good. A key feature is celebrities being willing to sacrifice comfort and luxury and take on challenges to win not for themselves, but for the non-celeb participants”.

Even if there are no celebs in the cast, adds Akehi, “the notion of going out on a limb for someone, like in *5 Friends, 5 Favours!* and *Baby*



“Shows like the BBC’s new *Gladiators* are delicious and delightful co-viewing – it shows how invigorating an existing format can provide energy.”

Ninder Billing, A+E Media Group

Shower has gained traction”.

In a sense, the format business is all about brand extension – into new territories, out of the archive and with spin-offs. All3Media International’s enduring format *Cash Cab* has just spawned *Cash Cab Music*, for example, while Paramount’s *Ex On The Beach* now has a winter version, *Peak Of Love*.

But there is also a burgeoning trend towards 360-degree exploitation – beyond mugs and T-shirts into the digiverse.

Well-documented is the launch of entertainment-based single IP FAST channels. But already this year there have also been the global expansion of the *Masterchef World* app, a branded content spin-off from *Big Brother* on Twitch in Germany (*Big Brother Knossi Edition*), and a virtual fashion line for *The Voice*.

On the latter, Jurian van der Meer, EVP of brand licensing & global



Big Brother Knossi Edition is a Twitch-based branded content spin-off from the German version of the globally popular reality format

partnerships at ITV Studios, tells TBI that the deal with Roblox to create virtual fashion “is the perfect way to connect one of our most successful brands with Gen Z.”

Turbocharging trends

Ongoing trends, such as the popularity of dating, are also evolving, with Burrell pointing to increased diversity in relationship shows, citing the reboot of *Finding Prince Charming* as an example. There is also a wave of entertainment formats based on iconic scripted IP – *007: Road To A Million* and *Squid Game: The Challenge*.

Africa is also emerging as a significant format buyer (recent deals include NBCUniversal’s *Real Housewives*), while demand for budget efficiency is also encouraging expanded renewals – where shows come back with longer season orders (and perhaps increased episode lengths).

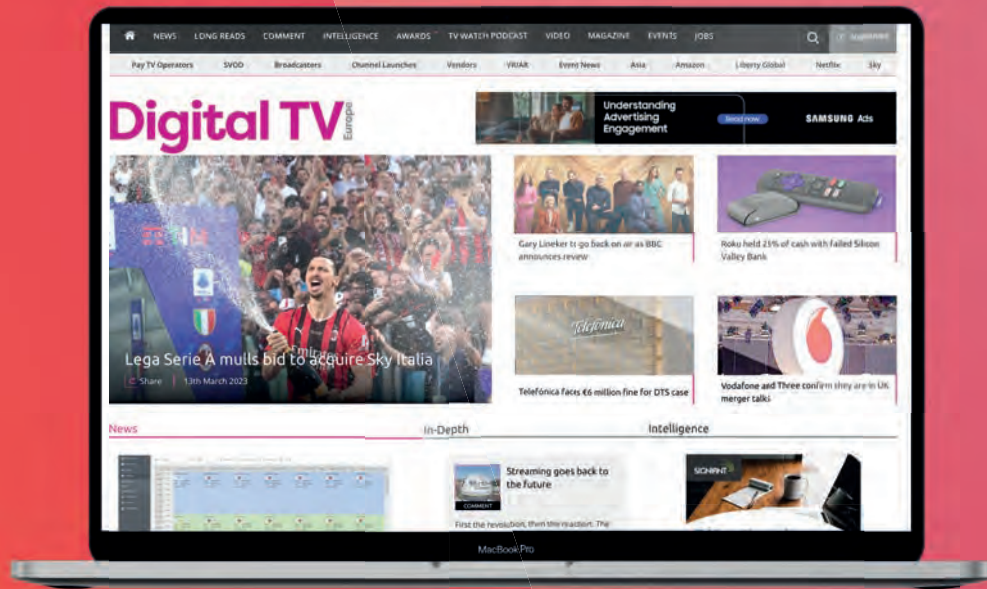
The pursuit of ‘bankers’ is also driving a new kind of deal, where broadcasters secure multiple shows from the same source.

HRT Croatia, which has aired ITV Studios’ *The Chase* and *The Voice*, has now picked up spin-offs *Beat The Chasers* and *The Voice Kids*, as well as *A Year to Remember*. Mario Sedmak, HRT head of entertainment, tells TBI he is “very happy with the continuous cooperation” with ITVS, highlighting the importance of partnerships amid turbulent times. “All ITV Studios shows at HRT are well received by audiences, so we are confident this will be the same for the brand new commissions too.”

And while the market is undoubtedly tough for producers and many distributors, there are chinks of light, some provided by global streamers looking for just the sort of cost-efficient of programming that formats can provide.

Netflix, for example, recently dropped its own *Traitors* lookalike *The Trust: A Game Of Greed* in multiple markets and unveiled a local version of *Love Is Blind* in the UAE, following previous adaptations in Brazil, Sweden and Japan.

With Amazon pursuing a similar strategy and Disney+ signing up for Fremantle’s *Italia’s Got Talent*, the streamers have put paid to the notion that unscripted formats are the exclusive preserve of linear broadcasters. And that must be good news for the entire business. **TBI**

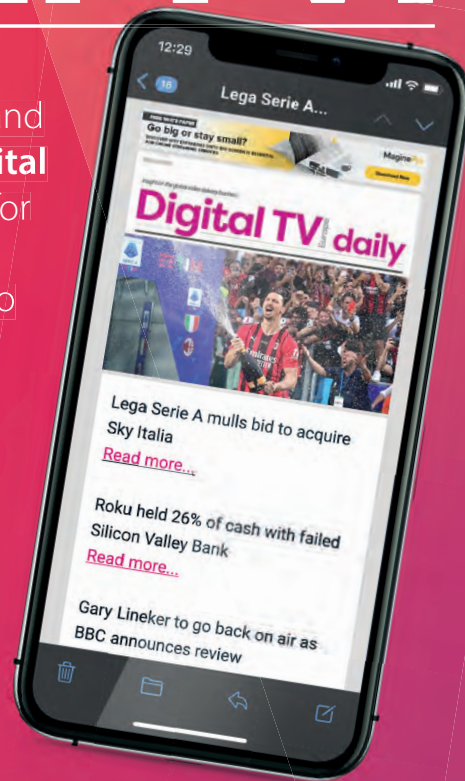


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Hot Picks

From detective drama and an international thriller to a reality murder mystery and uplifting tween series, TBI takes a look at some of the hottest shows heading to market

Monsieur Spade

Producer: Black Bear Television

Distributor: Fifth Season

Broadcaster: AMC+ (US), Canal+ (France)

Logline: The year is 1963, and Dashiell Hammett's legendary gumshoe Sam Spade (Clive Owen) is enjoying his retirement in the South of France – until six nuns are brutally murdered

Sam Spade, the iconic detective from American writer Dashiell Hammett's 1930 classic novel *The Maltese Falcon*, returns in this crime drama series that finds him in retirement in 1960s France.

"Life on the continent is a big contrast to his former private eye days in the city. The series has a kind of neo-noir tone and it's unashamedly a period drama," reveals Jennifer Ebell, EVP of EMEA sales & acquisitions at Fifth Season.

"When we find Sam, he's still hard boiled – but widowed and in France over half a decade. He's older and feels settled, more like a local."

Unfortunately, the one-time San Francisco gumshoe finds his peaceful life shattered with the return of an old adversary. When six beloved nuns are brutally murdered at the local convent, the town grieves and secrets emerge.

As Spade digs deeper into the crime, which has shocked the local community, he learns that the murders are somehow connected to a mysterious child who is believed to possess great powers.

Clive Owen (*A Murder At The End Of The World*) stars as Spade, with the show, which is made in association with Hammett's estate, following one continuous case over the course of the series.

Owen, says Ebell, "has a great presence and a gritty suaveness which brings the hardnose detective to life in a contemporary way – although it is a period piece it feels completely fresh."

She adds: "Spade is drawn back into his old craft, but he's motivated in a completely different way to solve the crime since he knows everyone in this community and has personal connections to the people affected. This isn't the faceless bustle of a big metropolis with a dark underbelly."

The show hails from *The Queen's Gambit* creator Scott Frank, alongside Tom Fontana, with Ebell describing the pairing as "an incredible creative pedigree."

The series, she adds, has "the timeless appeal of a compelling whodunnit with some deeper themes – a cosy mystery providing escapism during the depths of winter."



Top
Pick





Conflict

Things get very serious very fast for the residents of a small, Finnish seaside town, when their preparations for the midsummer's eve festival are interrupted by the arrival of armed mercenaries.

Locking down the entire area and holding those within hostage, the group is intent on provoking a wider conflict in Europe – and Finland is dragged into a proxy war.

Fleur Whatley, VP of sales at Keshet International, highlights the show's “*Call Of Duty*-style” action, with the series focusing on a mis-matched squad of conscripts left behind following the initial invasion, and a veteran war hero who goes rogue.

With more than 10,000 people held hostage behind enemy lines – including high-profile foreign nationals and the newly elected president's family – the series mixes high level politics with palace intrigue and close-up personal drama.

“It's a cleverly constructed narrative that the producers see playing out over three seasons, that

Producer: Backmann & Hoderoff

Distributor: Keshet International

Broadcaster: MTV Finland (Finland)

Logline: A Finnish seaside town becomes the centre of an international incident when an unknown enemy takes the entire area hostage

could also involve spin-offs set in other territories,” says Wheatley, teasing the franchise potential of the show, which already has a local commitment to re-order from MTV Finland.

“The concept of a proxy war in Europe involving global superpowers immediately makes this drama feel international as well as timely.

“More than 50% of the script is in English in this truly multilingual series. Only the locals speak to each other Finnish, in a *Narcos*-style approach,” says Wheatley. “There is also an extensive cast of well-recognised international actors including Peter Franzén, Dylan Smith, Nadia Forde, Sara Soulié and Larry Lamb,” reveals the exec.

Help! We Bought A Hotel

This 6 x 60-minute obs-doc series follows up True North's previous show, *Help! We Bought A Village*, by instead focusing on the stories of people who have given up their jobs, their homes and their lives to become hoteliers in some of Europe's most scenic locations.

The show charts the trials and tribulations of the owners of properties ranging from an empty Gothic revival mansion in Wales to diffused hotels and abandoned palazzos in Italy, a holiday complex in Spain and boutique hotels in France.

"From a flood in the kitchen during a busy breakfast service just days after launching their hotel, to a chimney flue catching fire, destroying a room, and opening a hole in the roof, it's been a rough ride for some of our contributors," shares True North COO Norma Wisnevitz.

"But they had plenty of nice times too. Like meeting the old owners of their hotel, who shed some light into what business used to be like half a century ago."

Wisnevitz adds that: "We can testify that there is never a dull moment in the life of a hotelier," with

the show uncovering the eccentricities of some former guests and residents – and even reports of a ghostly sighting.

Sean Wheatley, head of acquisitions at Passion Distribution, sees great international potential for the show, explaining: "Home renovation shows can work well on the international market, but renovating a hotel adds both an element of heightened drama and makes the end goal of the renovation something that is aspirational."

He adds: "Our buyers need to be confident their audiences will relate to a foreign TV series: buying a grand country house or a hotel in Italy to start a new life is something many people dream of doing, even if most of us never will, so it speaks to audiences across different territories."

Producer: True North

Distributor: Passion Distribution

Broadcaster: More4 (UK)

Logline: Obs-doc series following people who have given up the rat race to become hoteliers in some of the most scenic locations in Europe



Whodunnit - Easter Or Die

Eight-episode daily murder mystery reality series, stripped as a family friendly holiday event, in which 10 celebrities (and one host) are invited to a remote resort in the snowbound Norwegian mountains.

On arrival, they all learn they've been summoned by a celebrity obsessed murderer. Trapped on the mountain they must play the murderer's sick holiday themed games. The loser of each competition gets 'killed' in an overly theatric way, often in a nod to a famous film or murder mystery.

What's more, while the host is forced to facilitate each competition, the mysterious murderer is also a well-known celebrity, with the stars given hints to unmask the killer's identity before they are 'bumped off'.

In the final episode, the remaining three contestants compete in solving the murderer's identity and only the last celebrity left standing gets to leave the mountain after unmasking the murderer.

The show will launch on NRK in Norway this Easter and will involve competitions based on traditional Norwegian vacation activities like skiing, ice swimming and an egg hunt – but the format can be adapted internationally depending on the host country or holiday season.

Producer: Magga og Anders

Distributor: Lineup Industries

Broadcaster: NRK (Norway)

Logline: Holiday-themed murder mystery format in which a group of celebrities must complete challenges and work out which famous face is secretly out to 'kill' them

“Crime shows have long been a traditional Easter holiday television experience in Norway, so we saw this period as a perfect opportunity to pitch a daily reality show that combined all the best elements of the murder mystery genre and a fun family friendly reality competition,” shares exec producer Magnus Liestøl.

“We think of the format as very flexible,” adds Lineup Industries co-founder Julian Curtis. “The core components of *Whodunnit* are reality competition, murder mystery and a guessing game and these have universal appeal.

“The producers focused on an Easter-based competition and the theme of a masked murderer is rooted in Norwegians traditionally being in the mountains, potentially at their cabin reading or watching crime during the Easter period. But location, timing and theme for the competition can be based on anything,” he explains.





Louise Lives Large

Aimed at 9-13 year olds, this 8 x 24-minute series follows the uplifting story of newly cancer-free teen Louise Edgar as she embarks on a mission to make up for lost time, completing the items on her ‘Live Large List’.

With the help of her new friend and school outsider, Jess, Louise starts to tackle her list one item at a time and, whether experiencing triumphs or setbacks, truly starts to live large.

Creator Carol Walsh was inspired to write the show using her own teenage experience of returning to school after an accident as a starting point.

“She [also volunteered] extensively with teenagers and younger kids who had the same illness Louise had,” reveals Mairtín de Barra, from Tailored Films.

He adds that the show was further developed through interaction with teenagers who have been in Louise’s situation, “so the details of the series are authentic, accurate, mindful, sensitive to the topic at hand, and above all else, as warm and funny as the young cancer survivors who helped shape the show.”

Ultimately, the message of the show is “one of empowerment and taking control of the future after

Producer: Tailored Films, Storyhouse & Vérité Films

Distributor: WildBrain (excl. Ireland and Belgium)

Broadcaster: RTÉ (Ireland), Family Channel (Canada), Ketnet (Belgium)

Logline: Uplifting tween series following the story of a newly cancer-free teen as she sets out to make up for lost time

devastating setbacks. These topics are heavy and often dealt with in a somewhat maudlin manner in other media, so we subverted this by showing Louise’s complicated and nuanced journey in a way that is both accessible and informative.

“While reflective of the unfortunate reality of childhood illness, the series is hopeful and bright in tone, with a focus on humour.”

Caroline Tyre, VP of global sales & rights strategy at WildBrain, adds: “As we’re seeing with shows like *Malory Towers*, live action tween series with strong ‘coming of age’ themes remain extremely popular with global audiences and buyers alike.

“A heart-warming show that tackles a serious subject with an uplifting message and spirit of hope, *Louise Lives Large* is an ideal addition to our slate of character-driven live-action content.” **TBI**



Last Word Gerrit Kemming

Don't fear the digital-first age

“Maximising the production budget isn't the ultimate goal, it's about minimising it – while keeping the same quality”

Over the last year, media commentator Evan Shapiro has been warning the TV business about the challenge represented by YouTube. At MIPCOM, he pointed out that the platform dwarfs the FAST business – currently the focus of so much frenzied attention. More recently, he called YouTube “an existential threat” to the legacy TV business.

Key to Shapiro's thesis is that YouTube's share of big screen viewing is growing rapidly thanks to the increased penetration of connected TV sets (the same phenomenon driving FAST). Not only does YouTube look set to overtake Netflix's share of eyeballs as a result of its presence on CTV, but it has become the default viewing option for many kids and teens around the world. Shapiro concludes that “there's a real risk that broadcasters are going to lose this generation of consumers forever.”

Possibly, it's already too late for legacy broadcasters to do anything about this paradigm shift. But for content creators, the emergence of YouTube as a dominant player in the TV business shouldn't hold any fears. Endlessly creative and adaptable, producers have all the skills to become key players in this dynamic content-centric ecosystem.

That's the theory, anyway. In practice, many TV producers are yet to take YouTube seriously. Despite the fact that audiences watch a staggering one billion hours of content on the platform every day, most production houses still use the platform primarily as a destination for clips, bloopers and behind the scenes content. Very few have embraced YouTube as an opportunity to originate new content.

In part, this reluctance is due to the outdated view that YouTube's digital-first productions can't match the quality standard of broadcast counterparts.

Clearly, the economics of YouTube are currently such that you won't find the money to make *The Crown* or *Blue Planet* – and that's unlikely to change unless the platform gets back into the premium subscription business that spawned series like the popular *Cobra Kai*.

But in the realm of kids, factual, entertainment and animation, the gap has narrowed dramatically –

a fact that should come as no surprise.

The global success of Moonbug's preschool hit *CoComelon* is one high profile illustration. Quintus Originals are another. Series like *Red Zones* and *Beyond Borders* are digital-first series that launched on our Free Documentary YouTube channel and have since been licensed to traditional broadcasters.

And we're not alone in narrowing the gap. Studios like LADbible, Little Dot, Jungle and Vice have all created digital-first and TV-second content that can easily compete with traditional TV-content in regards to storytelling and production value.

Many of the people in charge at those innovator companies have a TV background who took their demand for sophisticated content with them to the digital world and now they apply it to the (digital) behaviour of their target group.

Of course, some producers are acutely aware that digital-first content can be as good as TV. But their reluctance to engage is more about the business model. For companies used to securing their budgets via commissions and presales, it's true that financing a show via YouTube can look more daunting. In the absence of a commissioning budget the risk is a lot higher, not only as the investment into the production will only be made back if the produced content performs accordingly on the market, but also the business metrics change. The business is not driven by the reliable service of producing the content any more, but by the profit that the produced show actually makes.

Suddenly maximising the production budget isn't the ultimate goal, it's about minimising it – while keeping the same production quality. This requires a complete shift of a traditional producer's mind set.

We at Quintus are fortunate that we come from a distribution and co-production background, because the deal-making skills we have learned are well-suited to the world of digital first content. For producers, the message is that there is a viable digital first opportunity if they are willing to flip the script on funding models.

That's not necessarily a message producers want to hear, but it could be the key to survival. **TBI**

Gerrit Kemming is managing director of Quintus Studios

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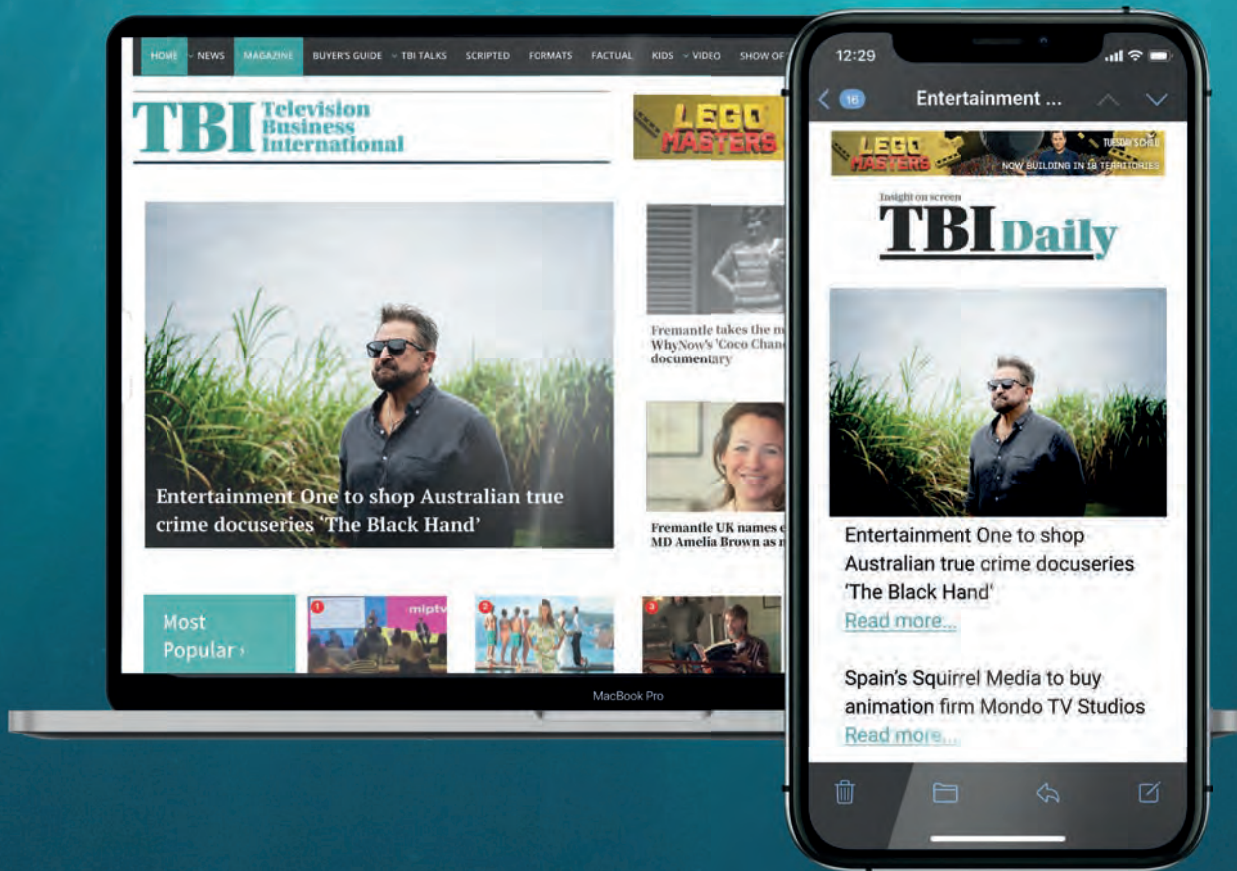
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