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EDITOR'S NOTE

STEWART CLARKE



Is the golden age of TV drama coming to an end? Is linear television dying? Should content owners go direct to the consumer? What was the biggest surprise in the international TV industry in 2015? Where's the next kids TV hit coming from? What kind of BBC do we want or need?

We asked the industry, and producers, distributors, broadcasters told us what they thought about all of the above, and more. The results? Linear TV isn't dead, but it might be dying. *Lip Sync Battle* was the format hit of the year. Factual entertainment is in rude health, contrary to rumour. And the golden age of drama? It might have hit its peak.

Broadly, industry consolidation was considered positive. "It shakes up the structures and exposes the weaker players," said TCB Media Rights' Paul Heaney. Opinion was divided on whether 4K broke through last year, as Pioneer Productions' Kirstie McLure said: "That depends which world you are in. With my Korean hat on – Pioneer has a JV there – the answer is a resounding yes. With my UK hat on it's a fat no."

Elsewhere in our industry survey, Pulse Films' Roy Ackerman mounted a spirited defence of the BBC, calling on the creative community to get behind BBC Studios and the Corporation. Stephen Lambert takes a

different view on Studios, the proposed production arm: "The BBC should gradually wind down in-house production," he argued.

The next kids hit? That will likely come from YouTube, according to several execs – with the video platform creating a new funding model for low-cost content that can be tested with viewers right away, before possibly making it to TV.

The drama golden age is either just getting started, or just starting to end, depending on who you ask. Paul Buccieri, John Morayniss and Pascal Breton all took the positive line. Fox International boss Hernan Lopez, meanwhile, said: "We're at least one recession away from seeing any decline in output."

NATPE boss Rod Perth also made a robust case for the need for markets such as NATPE, even in a digitally-connected world. Distributors broadly agreed with him, noting that while deals don't get sealed at the markets, face-time with clients remains essential. A glass of rosé in Cannes or a mojito in Miami will, then, remain part of the business for some time yet.

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Televisa shows off its English language skills

Televisa is the world's largest producer of Spanish-language programming. Now the Mexican media giant is making a major foray into English-language drama, with one show announced and another on the way. TBI gets the low-down on the media giant's English-language initiative

Televisa is one of the biggest producers in the world, making 90,000 hours of Spanish-language content a year. What it is not known for, isolated examples such as *Devious Maids* and *Chasing Life* aside, is English-language drama. With a Dougray

Scott drama *Duality*, set up and another announcement in the offing, however, it is now placing a bet on exactly that.

Mission: Impossible II actor Scott, once tipped as a potential James Bond, will star as part of a secret team of elite agents from the US State Department, the CIA and Mexican intelligence

in *Duality*. Maintaining their secret identities, the team take on Latin America's most dangerous villains, while also battling personal demons. The series is based on an original idea from Barry Schkolnick (*The Good Wife*, *Law & Order*). Vancouver-based Odyssey Media will be the Canadian production partner on the show,



which will be the first series to use the Mexican-Canada copro treaty.

Televisa USA production and distribution boss Chris Philip says the volume of production at the company will increase in line with the success of its series. The show will play across the Televisa free TV, pay TV, or digital channels

and platforms – effectively amortising the cost of making the dramas by showing them on its own nets – with success then further defined by the level of international pick-up.

Televisa and US Hispanic network Univision have strong and longstanding links, but the English drama will be pitched at English-language US channels, particularly those keen to reach out to the contemporary Latino viewer in a sophisticated way. “Look at the US Hispanic market and acculturated Latinos – they are interested in watching content in English, but content that is also close to what they know, or that speaks to them,” says Philip. “Some efforts to do that have been too obvious and tried too hard, this is a more subtle way to attract viewers. *Duality* will feature Mexico City, and that familiarity will attract a lot of US Hispanics intrigued to see a story set somewhere with which they are familiar.”

All of the series that come out of the English push will, like *Duality*, be shot in Mexico, where Televisa has extensive studio space and production expertise, and where production costs are low, by US standards. “It gives us a competitive advantage that will turn heads,” says Philip. “We can speak to that [English-speaking] US Hispanic audience better than anyone.”

The Mexican crews have cut their teeth on telenovela production, but the English series will not run to the 100-plus episodes of the Latin soaps. They are likely to run to 40 instalments although *Duality* is initially set up as two ten-part seasons.

Televisa USA has been staffing up as the drama initiative takes shape. David Sigurani has joined as director of scripted development, coming from *Nashville* producer Cutler Productions. On the sales side, Jonathan South, has joined as director of sales, worldwide. He came to Televisa from OTT service Magine and has previously been at A+E Networks. Andres Santos also joined the sales team, joining from Dori Media Group.

Philip says Televisa currently has eight series at US broadcast and cable networks, and the US arm of Televisa will use different models to get English fare away. With *Duality* it will effectively be the network, the studio and the financier, working up an original idea. Elsewhere, it will also look to rework content from the Televisa catalogue. (Lifetime’s *Devious Maids*, created by *Desperate Housewives*’ Marc Cherry, was based on Televisa’s Mexican show *Ellas son la Alegría del Hoga*, for example.)

“We are digging into the [Televisa] library and identifying shows with the development team,” says Philip. “There are series and loglines there, and we will bring in writers and showrunners and then take them to a network.”

There will also be third-party adaptations, the first example of which is hit Spanish drama *Gran Hotel*. Stephen Kronish (24) is attached as showrunner of the Televisa version, which will be set in pre-Fidel Castro Havana. It will be shot at producer Lantica Media’s Pinewood Studios in the Dominican Republic. Televisa will co-develop and finance multiple projects with Lantica.

In other cases Televisa USA will coproduce with US partners. It has joined forces with the cable production division of NBCUniversal for two upcoming dramas, *Pantera* and *Allies*. Televisa USA and Universal Cable Productions



“We have a competitive advantage that will turn heads”
Chris Philip

will jointly make the shows, which will be aimed at the US and international markets. *Pantera* will be a contemporary adaptation of the 1970s Mexican comic book series of the same name. It follows a corruption-fighting martial artist who is wrongfully accused of murder. *Allies* will be a reworking of Argentinian sci-fi series *Aliados*, following six people from different races who are ‘allied’ to six alien beings as the future of humanity is put at stake.

Another partnership is with Electus on *El Double*, a drug kingpin drama based on Televisa’s *Tiro de Gracia*. Ben Silverman’s prodcos is making the show for WGN America. Televisa has also acquired the rights to Anne Rice’s *The Sleeping Beauty* series of erotic novels. Thania St. John (*Chicago Fire*) been lined up to pen the TV adaptation, which Philip says will be “*Game of Thrones* meets *50 Shades of Grey*” and be “fun, racy and dangerous”.

Philip puts the English-language move into perspective. “Televisa has been operating successfully for decades, but our range of programmes, and different production and distribution models can build an English-language library, and add value,” he says. **TBI**

VIEWPOINT



LOUISE BERG

Testing times for talent

Talent shows have featured on our television screens since the dawn of the medium. From the days of *The Original Amateur Hour* in the US and *Opportunity Knocks* in the UK, viewers have enjoyed watching ordinary people perform their socks off to achieve their dreams.

This is because TV talent shows provide a compelling combination of human interest and pure entertainment. Everyone loves to watch a great singer belt out one of Whitney's best, but the performance is more enjoyable if you are on a journey with the performer. Viewers also like to play God and talent shows remain one of the few genres where they can determine the outcome.

As talent shows are so loved by the public, it follows that they are loved by producers. The megaliths of the talent show world (like *American Idol*, *X Factor* and the *Got Talent* franchise) have returned season after season, and new talent formats continue to spring up.

While on face value the genre seems to be alive and well, with many talent formats still featuring on primetime television, recently there has been a decline in ratings for some of the bigger shows. The latest season of *American Idol* pulled in around nine million viewers on average, a figure way down from its heyday of 30 million, and earlier this year it was announced that season 15 will be the

last. In the UK, ratings for *The X Factor* are gradually declining, prompting speculation the show will be dropped.

Ultimately, if they are to continue making the cut, there are challenges to overcome. One problem, particularly for singing competitions, is that the talent pool could be drying up. The chances are that most talented singers have already auditioned for one of the big shows, and producers can't just sit and wait for the younger talent to come through. Dropping the age range to include more children is one solution, but that brings legal and ethical challenges.

Producers are trying to deal with this issue by sending out scouts, increasingly to other countries, but the inclusion of international contestants can sometimes lead to immigration issues (and major embarrassment if talent has to be excluded).

Scouts are also having to rely on more established performers in their quest for talent. The requirement that contestants be amateurs was abandoned long ago, and many recruits are professional singers. These contestants are more reliable, but they are also more savvy when negotiating. Some already have managers on board, which adds another layer of complication given that finalists are often required to sign up to the producers' preferred managing agents.

Everyone understands that audition slots must be filled, but producers need to be

careful as recruiting experienced talent is not popular with the viewing public. People can feel cheated if they learn that a contestant has already had a recording deal, or has been deliberately scouted.

Talent shows must adapt to the challenges of a digital age. The content works well as short-form video, but producers have to think how to monetise it effectively. Some people simply watch the best performances on unauthorised YouTube clips rather than tuning in to full length programmes. Also, if producers can find more ways to find to bolster the decline in ad revenue from traditional forms of TV then their shows are more likely to succeed.

As far as social media is concerned, talent shows are a natural fit: these shows were interactive well before the advent of the internet. While most talent shows have embraced social media, when it comes to formats, it is questionable how creative producers have really been with social networking. Arguably a more inventive format with social media at its heart could be a standout success.

For now, the public's love affair with talent shows continues, albeit with slightly less ardour. There are still a multitude of talent shows on our screens, but this in itself is an issue for producers. To draw in viewers (and avoid format claims) producers must differentiate their programmes. Talent shows are already expanding beyond the traditional areas of music and variety, with recent formats showcasing baking, sewing, pottery and even barbecuing, but there is a limit to what prime time viewers will find entertaining.

There are certainly challenges to be overcome, but the basic formula remains a winner. It's unlikely that talent shows will be voted off our screens any time soon. **TBI**

Louise Berg is an intellectual property lawyer

Talent shows have challenges to overcome. One problem is the talent pool is drying up, especially for singing competitions. The chances are most talented singers have already auditioned one of the big shows

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The missing link, as it pertains to the world of TV formats, is between the smaller content creators that own IP and the distributors that can take that content to market. That is Jan Salling's theory on the evolution of format sales, and why he is attempting to bridge the gap with his new business

TV evolution and the missing formats link

It was announced that Jan Salling was stepping down as COO and managing director of sales and acquisitions at Nordic World in May after a turbulent period at the distribution and content company. He had built the distribution business at the firm after joining in 2010, and before that was at Zodiak Media and Banijay International.

Current market conditions, Salling says, have created the conditions for a new type of business, one that connects indie IP owners with distributors. There is increasing competition for content, and distributors having an ever-wider array of development deals, first-look arrangements, and equity stakes in indie start-ups and prodcos. But as the distribution sector becomes more consolidated, and indie producers have to deal with ever-larger businesses to get their content to market, some of the small- and medium-sized companies are struggling to be heard. That's why he created Missing Link Media.

"Over the years I have been speaking to indies in my role at Nordic World, and before that at Nordisk, Banijay and Zodiak, when they were in their early stages," Salling says. "I saw that in the case of the Nordics, while content might be local to local producers, the world saw it as one territory, and there was a

risk the pipeline of content from indies was not being used. Small and medium-sized indies in the Nordic countries and elsewhere still have the same problem, and they are asking, 'I have this IP, but is it sellable, and

glimpse of an idea from an indie, but the packaging is poor," Salling says. "Missing Link can help there, and then get the best deal with distributors for this IP."

Salling, a co-chair of format protection

"Buyers and distributors often see a glimpse of an idea from an indie, but the packaging is poor"
Jan Salling



if it is, who should I talk with?' They need someone to help systemise, place and sell their rights."

Salling will advise indies – from around the world, not just the Nordics – on how to present their formats in terms of promos and pilots, which shows they should focus on, and which distributors would do the best job, on the basis that producers are focused on producing and do not always have the time or wherewithal to present their shows in the best light.

"Buyers and distributors often see a

body Frapa, is no longer on the Nordic World board, but is still working for the TV2-owned company, contracted to work for it on a consultancy basis for two years (a situation that could change depending on what happens with its ownership). His involvement precludes Missing Link from becoming a distributor, but Salling says that is not what he wants to do anyway.

"I'm a consultant and not a distributor, but I have run production companies and distributors, and I can act like an agent or broker and help people to present their content," Salling says. "People have approached me to work for, or co-own a distributor, but my passion is the indie sector, and I want to see if the Missing Link business model works."

The bottom line is that in the modern TV world, even the most talented indies can struggle to do their day job – developing great shows and getting commissions – as well as being able to package, present and identify the best distribution partner. "TV is moving at warp speed now; it's not changing by the year, it's changing by the month," Salling says. "Amidst that chaos it's impossible for SMEs to manoeuvre. My role is to help them get exposure and grow their businesses." **TBI**

"TV is moving at warp speed now; its not changing by the year, it's changing by the month. Amidst that chaos it's impossible for SMEs to manoeuvre. My role is to help them get exposure and grow their businesses"



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There is a tradition of local drama in the Middle East, but *Heart of Justice* is the first time an original legal procedural has come out of the region, and *Qalb Al Adalah* as it will be known locally is being billed as the biggest TV series ever out of the United Arab Emirates

Justice landmark for Middle East drama

With US drama veteran Billy Finkelstein penning the scripts, new series *Heart of Justice* (aka *Qalb Al Adalah*) has been likened to a Middle Eastern *LA Law*. Filmed and financed out of Abu Dhabi, the Arabic-language series is unique in several ways. Firstly, it is not primarily scheduled for Ramadan; many regional dramas are designed specifically for broadcast during the holy month when TV viewing peaks, but with its 20 hour-long installments *Heart of Justice* is not specifically made to be stripped through the period.

Finkelstein, meanwhile, has a long list of scripted TV credits, many in the field of legal drama, including *Law & Order*, *LA Law* and *Murder One*. While his *Heart of Justice* scripts may not be considered edgy in US TV terms, they do break new ground in the Emirates. The writer was brought in by *Men in Black* producer Walter Parkes, who has been collaborating with Image Nation, the studio overseeing *Heart of Justice*. The Abu Dhabi Media-owned content company in turn recruited Dubai-based Beelink, which makes OSN's version of *Ugly Betty*, as the on-the-ground producer.

Another American, former HBO Europe drama boss Marc Lorber, is showrunning the series, overseeing a 75-day shoot that took place entirely in Abu Dhabi. "The series is non-traditional in several ways," he says. "It is not a format, and not a telenovela-type soap; it is clearly a drama. It has also been not been produced solely as a Ramadan series, and has been made without sponsorship finance."

He adds: "We think this will look as good as the top Turkish dramas that are popular in the region."

The show has a strong female character as the co-lead: Fatima Al Taii plays Farah, a Western-educated lawyer who, upon returning home to Abu Dhabi, confounds family expectations that she will join her father's (Mansoor Al Feeli) successful law firm by striking out on her own as a defence attorney.

"Farah is an incredible character to play," said Al Taii when the series was announced earlier this year. "She is a great role model and it's fantastic to see strong female Emiratis depicted on television. This show is testament to how far the UAE has come, not only in the media industry, but the country as a whole."

The plot set-up allows for a legal and family drama that has both story-of-the-week elements, and longer arcs that run for several episodes and through the series. While the two leads are not unknowns, they are not the big names that the region's soapy telenovela-esque series are usually built upon but there are several star turns during the show. Emirati television star Abdulla Bin Haider, Syrian actress Neven Madi, Lebanese media personality Carlos Azar, and Saudi star Khaled Al Buraiki all feature – but the fact these are supporting and not lead roles is a departure from the regional drama norms. Another of the guests stars turn is Lebanese singer Nicole Saba, who appears in a story about a notorious local murder case involving a pop star.



Funding comes from Image Nation and, crucially, the Abu Dhabi Judicial Department. The department was keen to be involved to promote its work and show how the rule of law is enforced in Abu Dhabi. It allowed the production team to film in its court buildings and law courts when they were not being used for official business, giving the series a visual stamp of authenticity.

The political and social ramifications of the series also extend to the boost it has given to UAE's TV production sector, which, while growing, is in its infancy. Billed as the biggest series ever to be filmed in the UAE, *Heart of Justice* utilised the skills of a 70-strong crew, 200 actors and 1,000 extras and the hope is that the series will provide the impetus to create more original series out of the Middle East. That ambition looks more likely to become a reality after Netflix content chief Ted Sarandos, speaking while at the Dubai Film Festival, said the streaming service is looking for original stories from the region that reflect contemporary Arab life.

The idiosyncrasies of UAE law mean that *Heart of Justice* is unlikely to resonate with mainstream viewers in the West, but there are large ex-pat audiences for a distributor to target, though a sales agent is still to be appointed. No broadcast partner is involved yet, with the show was fully-funded without a channel attached. Officials from regional pay TV platform OSN are rumoured to have visited the set, and country-specific and pan-regional free-to-airs are also tracking the project.

Which channel places a bet on *Heart of Justice* will become clear soon. At that point audiences in the UAE and the Middle East will deliver their own verdict. **TBI**

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TV's big questions

As the international television business year begins afresh, TBI asks the industry's most influential players for their views on the hot-button topics from last year, and what will define TV in 2016



What industry development took you by surprise last year?

This time last year, we asked the TV industry what the defining trend of 2015 would be. Some answers were close to the money: drama investment has indeed increased, European programming has become more globally relevant, and there have been shifts in audience measurement as digital viewing becomes more popular.

Others projections were wide of the mark: Facebook has not bought a production company, and while 4K grew, it wasn't the game-changer some anticipated.

There was a big new format, as many predicted. Spike's *Lip Sync Battle* broke out in a big way, as Peter Higgings, vice president of talent at US producer Renegade 83 notes. The talent format, from Eight Million Plus Productions and Matador Content and created out of a segment on *Late Night with Jimmy Fallon*, brings together karaoke and A-list stars, and has sold internationally through Viacom International Media Networks.

Another unscripted show, the BBC's bakery competition format *The Great British Bake Off*, did "astounding numbers", says Sam Barcroft of Barcroft Media. Ratings were indeed huge, with the 11.6 million recorded on week one growing to a massive 15.1 million for the finale.

Bake Off did not, however, solve the big problem of Saturday night entertainment formats – or the lack of new hits in the genre, as *The X Factor* suffered ratings drops in UK, as did *American Idol* in the US. Malcolm Gerrie, CEO of UK indie Whizz Kid Entertainment, says that the big surprise was "the stagnation of Saturday nights".

At TBI we have written a lot about 'slow TV' – where one event, such as train journey, is filmed and broadcast in its entirety – and Kirstie McLure, managing director of Pioneer Productions, says the genre's emergence on various channel schedules last year "amused and dismayed" her in equal measure.

Regulatory changes were the hot-button topic for some. Sophie Ferron from Canada's Media Ranch says the abolishment of Canadian content quotas – "drastic policy changes made to our TV industry in an attempt to respond to the fundamental shift in our television landscape" – will change production and distribution in the North American territory.

In the UK, S4C CEO Ian Jones says the possibility of the government selling pubcaster Channel 4 came as a surprise. "The current discussion

surrounding the possible privatisation of Channel 4 is something that could bring huge consequences for the UK TV industry," he says. Similarly, Zig Zag Productions founder Danny Fenton says privatising Channel 4 even being on government's itinerary is a shock. It's a story that, along with the future of the BBC, will likely set the UK news agenda throughout this year.

Across the Channel, Samuel Kissous of Pernel Media says TF1 Group's controversial acquisition of producer Newen "is a huge game changer in the French TV industry and may have a global impact".

For Turner Broadcasting System EMEA president Giorgio Stock, the surprise of 2015 was "the enduring resilience of linear TV, and traditional advertising, amidst an onslaught of new offers".

"Less surprising – and an area increasingly important for us – is the emergence of better quality 'digital native' content, some of which is crossing over to linear TV," he adds. "We are also looking with interest at the emergence of the eSports market as it evolves into a broad based proposition."

Digital developments are coming thick and fast, with a deluge of SVOD platforms launching and technology firms becoming bigger players in rights ownership discussions. Simon Andreae, former Fox unscripted chief and founder of FremantleMedia-backed Naked Entertainment, says the key change was "the speed at which we're reaching the tipping point where catch-up and VOD are becoming the preferred or default method of viewing".

"No one has a crystal ball, but surely it would have been impossible to predict how much digital would continue to disrupt the TV industry," adds Greg Beitchman, VP, content sales and partnerships at CNN International.

And then there were the SVOD players. Amazon Studios shocked the world in July by securing the services of Jeremy Clarkson, James May and Richard Hammond, who were newly on the market after an altercation over catering saw the *Top Gear* trio leave the BBC.

"Amazon Prime poaching Clarkson, Hammond and May – who'd have thought that was possible?" asks Liza Abbott, CEO of unscripted prodco 7 Wonder. "Amazon's investment in 'the new *Top Gear*' and in factual programming makes perfect sense, but was a surprise all the same," adds S4C's Jones.

Paul Heaney, CEO of TCB Media Rights, meanwhile, makes an astute observation about the increasing levels of hirsuteness in the business: "I was surprised by the sheer volume of beards now in the industry, especially amongst the menfolk."

From far left to right: Giorgio Stock, Ian Jones, Liza Abbott, Danny Fenton, Kirstie McClure, Paul Heaney, Simon Andreae, Kate Beal



Has the wave of M&A been a positive for the industry?

Industry consolidation continued apace in 2015. The biggest deal, announced last year and effective in 2016, was the merger of Banijay Group and Zodiak Media, and the news French media giant Vivendi was buying a 26% chunk of the new entity in a €290 million (US\$314 million) deal.

Canal+ owner Vivendi is set to play a bigger role on the international stage this year, not just as a shareholder in 'Zodijay/Banijak', but having also acquired a cluster of smaller content companies has clearly made expansion of its global footprint a priority.

It was a tumultuous year in France, with enormous fallout from the TF1-Newen Group deal. Meanwhile, like Vivendi, Lagardere Entertainment is refocusing on activity outside France, and has a more international outlook as we head in to 2016.

TF1 could well be taking a strategic cue from ITV, which has been the most aggressive buyer of production companies in recent years and in 2015 did its biggest deal yet, buying *The Voice* prodco Talpa Media. ITV also installed Leftfield Entertainment's Brent Montgomery atop its restructured US division in 2015, replacing Paul Buccieri, who had left for A+E.

But as mega indies become more mega (giga?), and both production and distribution gets more consolidated, is it good news for the sector? "It's absolutely fantastic for the industry," says TCB's Paul Heaney. **"It shakes the structures up and exposes the weaker players. It also allows a trickle down of talent who relish an opportunity to 'go it alone' as indies, rather than being in a super-indie. It acts as fertiliser for the business, allowing green shoots of talent to grow."**

The M&A is a result of indies retaining rights, says Stephen Lambert, the Studio Lambert founder and All3Media executive who has started indie brands, and worked for large and small content companies in the UK and US. "Once indies became profitable, consolidation was inevitable," he says. "That leads to strong, robust companies able to retain talent and spend a lot on development. However, since it is easier than ever to set up new indies, the big merged groups have to make their organisations creatively exciting and rewarding or their best people will leave."

One company active in buying into prodcos was FremantleMedia, which took stakes in *Man Alive*, *Naked Entertainment*, *Corona Pictures*, *No Pictures Please*, *Fontaram*, *Kwai* and *Wildside*.

Did 4K break through in 2015?

There was a buzz around ultra-high definition television coming into 2015, but did the medium have the impact many expected? For *Naked Entertainment*'s Simon Andreae, it was a resounding no. "How many people got a 4K set for Christmas? Not many," he says.

MoMedia boss Lucas Bertrand has a similar view. "It's not even close to breaking through," he says. "It's still a bit of the Wild West for delivery formats. Keeps selling the TVs though..."

Whizz Kid Entertainment's Malcolm Gerrie saw 4K television "dribbling through", though he expects it to break in a bigger way in the future, while Lee Morris, managing director of *SS-GB* prodco Sid Gentle Films, says: "I'm sure that 4K will arrive, but no-one is really pushing us to produce in the medium at the moment."

Others such as Blue Ant Media, Discovery Communications and Pioneer Productions have already made big 4K production commitments that are already resulting in UHD specials and series coming through.

"It's an interesting question that depends on which world you are in," says Pioneer's Kirstie McLure. "With my Korean hat on – Pioneer has a JV in Korea, Buzz Media – the answer is a resounding yes: we are now shooting and mastering two wildlife series in 4K. But with my UK hat on – it's a fat no. However, I suspect we will see a gradual move towards more 4K in 2016 in the wildlife and drama arenas."

Amazon Instant Video's Chris Bird says all of the SVOD firm's UK productions, including new effort *The Collection*, will be shot in 4K (and it's a similar story at Netflix), while Peter Higgings from *Renegade 83* says that while it hasn't made a dent on the consumer front, "everyone on the inside is talking about it".

The medium has completely convinced some. Woodcut Media CEO Kate Beal says: **"2015 proved that 4K is here to stay as more and more producers started adopting the format. It's not the technology fad that 3D turned out to be."**

She says camera prices are now reasonable, "so there is no barrier to entry out on location", though post-production remains a longer process than with HD or SD.

"Once this part of the process is smoothed out, sped up and made more economical, we'll see 4K not just break through, but dominate production from now on," she adds. "Until the next new big format that is."

TV's big questions



Which SVOD/next-generation platform made the most impact in 2015?

"I am in no doubt that Netflix in particular has completely changed the way we watch and think about television," says S4C boss Ian Jones, summing up what most in the industry think.

Netflix indeed dominates the SVOD conversation, and will continue to do so as it doubles its original output this year – spending a cool US\$5 billion on content.

The SVOD story is, however, becoming more complex as local and regional rivals come to the party. GraveTV, Shomi, Stan, Presto, Wuaki, Icflix, Watchever and a host of others now rank as competition to Netflix in the streaming world. "It is the proliferation of such a large amount of platforms that was a standout in 2015," says Turner's Giorgio Stock. "This is positive for the whole industry: for the consumer with easier access to content; for the content providers with more outlets to market; for us broadcasters with options to go direct to consumers or to team up with providers with space for us to curate our content."

The SVOD content story is getting more nuanced as well, with original films and now entertainment shows: the ex-*Top Gear* trio's Amazon Studios show is one of the most-anticipated in any genre in 2016.

When it comes to drama production, programme makers are in no doubt an SVOD effect is occurring. "Netflix has changed the game, but it doesn't have to play by the same rules as everybody else," say Al Gough and Miles Millar, the pair behind buzzy AMC drama *Into the Badlands*.

In factual, Netflix is the leader, according to Simon Chinn, co-founder of *Man on Wire* prodco Lightbox. **"Netflix continues its bold march into original programming with more great drama and feature docs, and increasingly some ambitious factual and documentary series commissions, which no other SVOD platform has thus far matched."**

Karim Ayari, CEO of Vivendi's German SVOD service Watchever, says smart partnerships will be key to on-demand growth. "Despite all the excitement around SVOD services in 2015, non-linear television is still very much in its infancy," he says. "The industry needs to reconsider the whole value chain, from content design and production to distribution. Success will come from new forms of partnerships between rights holders and SVOD operators; together, new ways of curating and aggregating content should be explored."

How have direct-to-consumer services affected the market?

The launch of HBO Now was hailed as a watershed moment in 2014 and heralded a seeming acceptance from traditional media that affluent, young audiences were not going to take a pay TV subscription, but would pay for an alternative that offered better access on the go. Last year saw many go the same way, with Disney launching DisneyLife, Viacom creating Viacom Play Plex and CBS deciding to put its upcoming *Star Trek* series exclusively on CBS All Access.

"For many types of programming – notably drama – being able to watch what we want, when we want, is far, far better than being forced to watch things at specific times," says Simon Cornwell of *The Night Manager* prodco Ink Factory.

"There's been a marked change in how and where we consume television, with more and more consumers rethinking how they access video content and more people subscribing to direct-to-consumer online services and on-demand," adds Andrew Cole-Bulgin of Komixx Entertainment. "Companies like HBO are looking to remove the barriers to those who want to access their content."

"This will affect unscripted as well as scripted shows," says Simon Andreae, "with *The Jinx* leading the way and fascinating experiments like *The Murder Detectives* close on their heels."

Chris Hilton from Essential Media says the rise of OTT services relates "directly to the unbundling of cable services in Canada and the USA", and that some cable groups will "disappear" as a result, though Sam Barcroft suggests the platforms' popularity gives hope to broadcasters that they can go direct to consumers to retain some of their market share.

Hopster chief Nick Walters says D2C has "profoundly" affected industry conditions, adding it means "pay TV will get cheaper; we'll re-think what a channel means; some existing channel brands will disappear; commissioning will get faster and more data driven; and telcos will become major players in the distribution landscape".

Going forwards, Renegade 83's Peter Higgings expects traditional media groups to react by producing higher-quality content and develop their own streaming technologies. Malcolm Gerrie from Whizz Kid, meanwhile, has a word of warning: "If the TV industry isn't to go the way of the record business then it needs to be able to improve choice and finds new ways of monetising content."

From far left to right: Andrew Cole-Bulgin, Simon Chinn, Nick Walters, Karim Ayari, Simon Cornwell, Roy Ackerman, Stephen Lambert, Gina Brogi, Bob Bakish, Christian Baumard



The BBC is at the centre of a huge debate; what direction should it take?

“Any TV executive who doesn’t care about the health of the BBC needs their head examined,” says Pulse Films unscripted boss Roy Ackerman. “What does it need to do? Spend as much of the licence fee on distinctive programmes as possible. This should include popular mainstream shows like *Strictly Come Dancing*, *The Apprentice* and *The Great British Bake-Off*. Contrary to some opinions, distinctive doesn’t mean only programmes that other networks wouldn’t do – which can land you with a track record of market failure. However, it does mean that the BBC’s channels can afford to take more risk.”

It is a tumultuous period for Aunty, as the BBC is affectionately known in the UK, with discussions ongoing about its new charter, how it is governed and its wider role in the TV world. The pubcaster, with Tony Hall at the helm, has come out fighting, and the debate is fierce.

The Beeb now part-funds S4C. The Welsh broadcaster’s boss, Ian Jones, says the BBC is an “essential institution” and a “beacon of creativity worldwide”. He adds: “A strong and vibrant BBC is essential to the UK’s creative economy.”

A major development in 2015 saw Danny Cohen announce in October he was exiting the corporation, leaving a director of television-shaped hole.

Cohen is “a huge loss to the BBC”, says Komixx Entertainment’s Andrew Cole-Bulgin. “He was a massive creative talent, continually pushing boundaries and taking chances,” he adds. “His ability to disrupt thinking was a credit to the BBC and something that they must take on board with his replacement.”

Meanwhile, money-making arm BBC Worldwide bought into indies last year, and plans to launch new production arm BBC Studios were revealed, ruffling the feathers of ITV, the indie sector and others in the process.

“I am sceptical about the idea of BBC Studios standing alone as a supplier to all broadcasters,” says All3Media’s Stephen Lambert, echoing the thoughts of many in the production world. “The BBC should concentrate on commissioning the best ideas from the market and gradually wind down in-house production.”

Pulse Films’ Ackerman, meanwhile, issues a rallying call. “Everyone in the creative community should support those who can help the BBC get BBC Studios right,” he says. “Good luck to Peter Salmon, a smart and thoughtful choice as director.”

Is linear TV dead/dying?

For Peter Higgings from *Naked and Afraid* producer Renegade 83, the writing is on the wall for linear TV. “It’s dying, but slower than many people expected,” he says. With timeshifted, binge- and on-demand viewing increasingly the norm, traditional channels have reason to worry, although demographics mean linear isn’t going away any time soon.

Viacom International Media Networks president Bob Bakish says: **“There is without a doubt a generational shift underway in how TV is viewed. Increasingly, we see a shift towards on-demand versus scheduled viewing; more binge viewing of multiple episodes of a series; and a migration from traditional TV to multi-screen viewing. But, while all of this is going on, we see the vast majority of viewership accruing to linear feeds.”**

The point is echoed by others. “Today’s audiences are more demanding than ever,” says Christian Baumard, CEO of France-based producer and distributor KABO Family. “However, I don’t think this signals the demise of linear TV as such, for two reasons: Western audiences are getting older, and those with solid viewing habits aged 50-plus tend to watch what they like among what is offered and linear TV is part of it. Secondly, multimedia groups and TV channels have the resources to pick premium programmes and projects.”

Digital hipster brand Vice is among those betting that linear TV remains relevant, and in partnership with A+E is rolling out traditional TV channels, having announced the launch of Viceland in the US.

Sports, events and news remain the preserve of linear, although viewing is now across different devices. “Linear TV is not dead in the slightest, but is evolving in the way that TV has continually changed since its very inception,” says CNN’s Greg Beitchman. “However, the mass reach via the TV is still there, but enhanced by a presence on every imaginable screen. Yes, you will have breaking news bites on your mobile, but linear TV still delivers a real-time experience available nowhere else.”

“With countless viewers who see television as a lean back experience and want to be programmed to, I don’t believe linear TV will ever fade out completely,” adds Gina Brogi, 20th Century Fox, executive VP, worldwide distribution, pay TV/SVOD. “However, this is a challenging time for linear TV channels in that viewing content on a linear basis is declining.”

TV's big questions



Are the main TV markets still relevant and vital?

Commerce is changing. The Frank brothers have created a digital rights trading platform, TRX, which sits alongside others from the likes of Screen Hits. With these, online screening rooms, Skype and other new ways to connect, the folk running TV markets must be concerned.

Outgoing NATPE boss Rod Perth offers a robust defence of the industry get-together. "Online content screenings and utilising online products like Skype as a communication tool is both valuable and inevitable, and actually helpful to the most important markets," he says. "Our event is all about blending both traditional suite and market floor screenings, and digitally providing screenings that augment and make markets even more valuable."

NATPE's Miami event has become bigger and better for many in recent years, while NATPE Europe moves back to Budapest this year. Reed MIDEM, meanwhile, reported 13,700 MIPCOM attendees in October, the same as in 2013. MIPTV has claimed 11,000 delegates for three years.

What is clear is that international TV is a people business, and talking shop with a glass of rosé in Cannes remains popular. "Most exhibitors do the majority of their business outside of these markets and have done for some years," says distribution veteran and Raydar Media founder Alison Rayson. "Digital screenings have enhanced this trend and so the major markets have become less transactional and much more about relationships, strategy and pitching."

Greg Phillips, president, Content Television & Digital, says: "Our goal is to spend more time getting to know our clients, and their channel and territory needs – and the markets provide an invaluable opportunity to achieve this." For Nicky Davies Williams, DCD Rights CEO, "online screenings and Skype are certainly an essential tool to keep business moving throughout the year, but they don't compare to the face-to-face time you get with clients at the key markets".

She adds: **"It's important to spend time getting to know buyers, their audience, their schedules, their regional trends, to build an ongoing partnership – and you really can't do that effectively only on screen."**

Paul Heaney sums it up for many in the industry: "In a world where content is so similar, relationship building has never been more important. Email doesn't have the same effect as a Salad Nicoise and a glass of Cab Sav."

Will there be a global kids TV hit in 2016?

If 2015 felt like a strong year for drama and documentary series, the same cannot be said for kids TV. Developing a children's brand remains a slow process, and largely dependent on a successful retail programme. So where is the next *Peppa Pig* coming from?

"It's hard to predict," says Raydar Media's Alison Rayson. "Kids TV global hits tend to take years to become established, as opposed to other genres. Buyers need to see that shows are on established and like-minded platforms, and are being recommissioned, to give them the comfort to take the leap and acquire. **My hunch would be if there is a global hit, it will be an existing series that has been stealthily building in a number of key markets.**"

Genius Brands International CEO Andy Heyward is convinced 2016 will see a new hit as there are "more and more avenues of media speaking to kids", while The Jim Henson Company executive VP of global distribution Richard Goldsmith agrees a winner is on the way "as long as we distinguish between a hit and a phenomenon".

Zig Zag Productions boss Danny Fenton says a major hit is "probably due any time soon".

Sources this year have talked about 2015 being the year retail companies began to see original kids programmes on Netflix and Amazon Prime Instant Video as strong enough to launch licensing and merchandising programmes around. Previously, producers were so reliant on major terrestrial broadcaster backing that they would often be inclined hand over TV rights for very little (in some cases nothing at all) to help their brands gain the exposure that hopefully leads to the lucrative shelves of a toy shop.

Accordingly, if there is to be a hit, "Netflix will decide", says Sam Barcroft, CEO of Barcroft Media. "With all the new platforms interested in children's content, there are now more opportunities than ever before for exceptional properties to succeed," adds Jim Henson's Goldsmith.

Last year also saw the launch of the YouTube Kids app, which was thought of as a game-changer by many. Could the Google-owned platform also spawn the next big children's hit?

Lucas Bertrand from MoMedia says there will "absolutely" be a new show on the block, but adds it "may not come from where you expect. YouTube anyone?"

From far left to right: Rod Perth, Nicky Davies-Williams, Alison Rayson, Andy Heyward, Richard Goldsmith, Malcolm Gerrie, Hernan Lopez, Pascal Breton, Greg Beitchman, Paul Buccieri



Is the 'golden age of TV drama' over?

The boom in high-end scripted drama production is swelling the coffers of content owners and lengthening viewers' lists of must-see shows. There's so much that FX Networks released data showing there were 409 dramas in the US last year, a 9% year-on-year rise and 94% rise since 2009.

Can it continue, or has it peaked? "It's just getting started," says Amazon's Chris Bird. "Only hindsight will tell us that," says Lee Morris of Sid Gentle Films, "but my guess is there is plenty more to come."

"When it comes to drama, especially as seen throughout Europe, the market has just begun to unveil its potential growth," adds Pascal Breton, whose company, Federation Entertainment is producing Netflix's first French scripted series, *Marseille*.

Entertainment One Television president John Morayniss says: "If anything, the proliferation on a global basis of new platforms and on-demand subscription viewing has created even greater demand for high-impact, high-quality, provocative and compelling content. I think creative risk-taking has never been greater among buyers and sellers."

Fernando Szew, CEO of LA's Marvista Entertainment, notes a "two-thirds increase in series since 2010", but believes there's more to come. "At Marvista, we don't think the golden age of drama and series has reached its peak," he says.

History and A&E president Paul Buccieri echoes those sentiments. "In fact, more people are consuming television than ever," he says, though this does mean competition for writers, showrunners and directors is "fierce" among the studios.

There are those who see commissioning slowing. Samuel Kissous from Pernel Media believes the golden age is ending, "but this peak may last for a while", while Essential Media's Chris Hilton says: "There's a mad scramble for drama, and every time that happens the quality drops and people start looking for the next thing."

Sam Barcroft is more unequivocal. "Yes, it is over," he says. Danny Fenton from unscripted producer Zig Zag takes a different line. "We are still seeing the sun shining on drama, but I think it maybe setting rather than rising," he says.

Fox International Channels boss Hernan Lopez says the boom will continue... for the time being at least. "We're at least one recession away from seeing any significant decline in output," he says.

What trends and shows are shaping the world of content?

In the world of docs, Lightbox's Simon Chinn says 2015 was the year of the documentary serial. "For me, HBO's *The Jinx* was the game-changer," he says. "Following in its wake is a genre of serialised, highly-narrative docs which deploy fiction filmmaking techniques in a way that feature docs have been doing for some years."

Woodcut's Kate Beal highlights Endemol Shine's UK version of Swedish drama *Humans* as a highlight. "It was great to see a drama on Channel 4 break through to audiences of all ages," she says. "It became appointment to view for the 16-34s, which is incredible for a linear channel."

S4C's Ian Jones says last year saw live news broadcasting entering into uncharted territory with coverage of the Charlie Hebdo terrorist atrocities. "In the aftermath, big questions have been asked about the morality of such detailed coverage. Did the broadcasters behave irresponsibly? Did the broadcasts hinder the police operation, and worse still, endanger the lives of the hostages?"

The drama industry, meanwhile, is asking itself whether there is too much TV, with the debate sparked by FX boss John Landgraf. From a creative perspective, producers Al Gough and Miles Millar note it is an amazing time to be in TV, but that changes are afoot.

"It does feel that we are reaching a tipping point," the pair say. "There is going to be shakeout. Audiences have come to expect *Game of Thrones* production values, jacking up the costs of production. It's going to be more difficult and prohibitively expensive to make and market an ever-increasing number of shows."

The current era will shape the drama series to come, they add: "Whatever the future, it will be paved by this era of creative expansion and daring. The medium will emerge and settle stronger and richer."

While scripted TV has bloomed, some say the reality and fact-ent worlds have not in recent years. Stephen Lambert, who is behind some of the biggest unscripted shows on TV, rejects the idea that the genres are in the doldrums. **"To suggest that fact-ent needs to bounce back seems bizarre; it's never been stronger,"** he says. "The most popular show on the BBC this year is *Bake Off*. ITV continues to show that *I'm A Celebrity* is a ratings juggernaut and our own *Gogglebox* is the most popular show on Channel 4. I'm confident we will see a lot of new successful fact-ent shows hit our screens." **TBI**



Hungry for horror

What is whetting the appetite of horrors fans? Zombies? Demons? Monsters? Jesse Whittock looks for answers from the key broadcasters, producers and distributors behind the best fear-inducing shows on television

On Friday, October 9, 2015, around 15,000 people flooded into Madison Square Garden in New York City to attend an exclusive event for the season six premiere on *The Walking Dead*. The iconic venue in Midtown Manhattan is more

used to hosting music concerts, boxing fights and American sports events than actors from a horror television drama show, but the night proved things are changing.

The Walking Dead, AMC's ratings juggernaut about a group of survivors in a zombie apocalypse, has led a new generation of horror programmes in

the past half-decade, with other efforts including sister series *Fear the Walking Dead* (now holder of the largest-rating debut cable TV season record), *Ash Vs Evil Dead* (Bruce Campbell returning as schlock-horror anti-hero Ash Williams), new season Fox effort *Scream Queens*, and *American Horror Story* (an FX anthology series from *Glee*



American Horror Story

creator Ryan Murphy).

"*The Walking Dead* paved the way for horror to come through more mainstream television channels," says Rick Ringbakk, co-founder of US reality TV producer 5X5 Media.

Broadcasters may now be looking at horror as banker genre, but when the zombie apocalypse started in October 2010 "nobody knew *The Walking Dead* would be a hit in the US", says Sharon Tal Yguado, head of Fox International Studios and executive VP, global scripted at



Ash Vs Evil Dead

sister firm Fox International Channels. The latter had invested in the project early, taking international day-and-day rights, but Tal Yguado says that as AMC's ratings expectations were much lower than they are now, the main commissioning qualification was "quality". That quality assurance came from the popularity and depth of Robert Kirkman's *Walking Dead* comic books, which have published since 2003.

"The show broke records all over the world – it broke records on its premiere night," says Tal Yguado. "When we look back in retrospect the thing that was obvious was that it was groundbreaking, a first in genre. Like *Lost*, there was a something for the viewer in the survivor element. That was the identifiable element, and that is also quite addictive."

That element has helped AMC's chat show spin-off *The Talking Dead* to do huge numbers immediately after the main show, and Fox UK recently acquired the series. "The host, Chris Hardwick, is a fan of *The Walking Dead*, and his enthusiasm to get the story behind the episode is addictive," says Tal Yguado.

"There is a culture of binge-viewing happening and a saturation of content in television – I'm a producer and even I can't keep up with half of what is launching – so you need shows that manage to grow their audience, create an urgency around them and get people talking about them," she adds. "It's important to create a desire to continue the conversation."

A gluttonous desire for horror content is driving demand, something that has led to the creation of horror themed video-on-demand platforms. "This is a dedicated fan base," says David Fannon, executive VP of Screen Media Ventures, which operates on-demand app FrightPix. "People who love horror, love horror. They can go from high-end to over-the-top schlocky crap."

FrightPix offers horror films such as *Paranormal Activity 1, 2, 3 and 4* for free in Canada and the US, and recently did a deal with cult horror-cum-social-commentary-film director Lloyd Kaufman. This will see the Troma Entertainment founder curate 20 of his favourite films, prefaced by a personal video introduction to each.

On the subscription on-demand front, AMC earlier this year launched the horror-themed Shudder, after the success of its thematic Doc Club. The platform currently offers curated and hard-to-find movies for US\$5 a month.

Sam Zimmerman, a former horror magazines editor and now curator of Shudder, says of the model: "Horror is essentially niche, but is one of the only genres that constantly has had crossover appeal. *The Walking Dead* has exposed people to fandom, but many people enjoy horror movies without even realising that they do. The genre can inspire the dedication for an SVOD service like this, and there is the library out there to service them."

Horror does indeed have a long history, stretching back nearly 120 years to the silent films of cinema pioneer Georges Méliès. It also spans a wide variety of genres – schlock, psychological and gore, for just three examples – and even more sub-genres.

“There is a bit of a spectrum in the horror genre,” says Greg Phillips, president of UK-based distributor Content Television & Digital, which launched serialised horror drama *Slasher* at MIPCOM. “Are we talking the kind of horror that boys watch when they’re drunk at midnight, or is it the kind that couples cuddle up to? In TV it’s a mixture of both.”

Slasher represents the first original series for thematic horror cable channel Chiller in the US, and has Canada’s Super Channel and Shaftesbury on board. Phillips says it has appeal to a television audience as well as to core horror fans because it is “mystery horror, suspense and crime fiction. It has a horror edge, especially if you look at the artwork we’ve done for it, but it’s actually serialised television”.

Formatting horror to make it more ‘tevisual’ has been a key element in the success of *The Walking Dead* and FX anthology drama *American Horror Story* around the world for the Fox channels, says Tal Yguado.

She expects the same from Robert Kirkman’s next project, *Outcast*, which FIC wholly owns, and which will soon air on premium channel Cinemax in the US. The show, again based on a comic predecessor, follows Kyle Barnes (played by Patrick Fugit), a young man plagued by demonic possession who, with the help of a troubled preacher, embarks on a journey to find answers to his predicament.

“What Robert has done again is create the human story that is at the heart of the piece, which is very identifiable and sympathetic,” says Tal Yguado, an executive producer on the show. “He treats the story as if it could happen anywhere.”

She says *Outcast* presents a different kind of opportunity to *The Walking Dead*, because, “a larger part of society believes in demonic possession than zombies”.

The fanboy element common to many horror hits has even extended to unscripted TV through shows such as Sony Pictures Television and ITV2 format *Release the Hounds*, BBC Three’s *I Survived a Zombie Apocalypse*, and Game Show Network’s *Hellevator*, which comes from *The Purge* studio Blumhouse Productions, Matador Content and Lionsgate Entertainment.



The Walking Dead



Hellevator

In *Hellevator*, pairs of contestants enter an elevator that stops on different floors with each offering up challenges that play on their fears.

“Each episode has specific nods to horror fans, from using genre lingo to introducing urban legends and real-life stories such as the first documented American serial killer Dr. H. H. Holmes, who lured his victims to their deaths in his elaborately constructed ‘Murder Castle’ home in Chicago,” says executive producer Todd Lubin.

There are elements of humour, too, which is common with another new effort, 5X5 Media’s *Bruce Campbell’s Horrified* (WT), which will see the comedy-horror legend hosting a reality competition show that celebrates horror fandom. Each episode focuses on one horror staple – monster, zombie or psychopath for example – and has contestants completing challenges to stay in the game.

“Part of the issue with horror merging into reality is that horror is all about the suspension



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Outcast



Troma Entertainment

of disbelief, and in reality no-one is going to get killed,” says 5X5’s Rick Ringbakk. “That’s why the comedic-based horror genre was the starting point of development. We wanted it to be a celebration of the genre itself; to help fans live out their horror fantasies.”

Ringbakk points the Campbell’s cult appeal among fanboys and girls, saying the actor is “definitely enjoying a resurgence, with *Ash Vs Evil Dead* getting the second season pick-up before the first has even gone out fully”.

US premium cable channel Starz is placing

significant faith in *Ash Vs Evil Dead*, the drama-comedy based on classic horror film *The Evil Dead*.

“*Ash* is a unique property, which can attract people who grew up with the original show, and appeal to the next generation,” says Starz managing director Carmi Zlotnik. “The fact [the film] broke ground as a mash-up of horror and comedy made it unique.”

Keeping continuity with the film’s tone and aesthetic was paramount, adds Starz’s senior VP, original programming, Marta Fernandez, which is why the involvement of Campbell, *Evil Dead* director Sam Raimi and original producer Rob Tapert was mandatory. “Bruce is amazing on set,” she says. “He knows how to make everything *Evil Dead* whenever it veers off.”

The idea was to create a unique world of comedy and terror. “We’ve tried to show the horror of it all,” says Zlotnik. “This is a scary movie with an idiot as a central character. It has all of the psychological triggers that we think of in horror, but then have someone wise-cracking his way through the story.”

Almost inevitably, the show debuted in the US on the spookiest night of the year: October 31. “There are a few factors you have to think about when launching a show: one is availability – what window, what competitive products are on the market and what sort of experience is it for the audience,” says Zlotnik. “With *Ash* we felt it was great to air it at Halloween.”

With horror programming in its various guises continuing to draw in big audiences, producers and broadcasters are searching for ways to make their efforts reach traditional horror fans and comic book collectors, as well as much broader primetime TV audiences.

“Fear for fear’s sake doesn’t work on television,” says FIS’s Tal Yguado. “Maybe it does in cinema, where the room is dark and there is surround sound.”

“In TV it’s about putting yourself in the shoes of other people, and if you can do that people will watch week after week.”

The genre is, however, showing signs of fatigue; *The Walking Dead*’s sixth season premiere may have brought thousands to Madison Square Garden, but couldn’t match the record-breaking season five premiere, which took 17.3 million.

For the moment, however, viewers remain as numerous as the ‘walkers’ stalking Rick Grimes and his ragtag band of zombie apocalypse survivors. **TBI**

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THE SHOW: *Marry Me Now*

THE PRODUCERS: Armoza Formats, Zipi Rosenblum

THE DISTRIBUTOR: Armoza

THE CONCEPT: Reality format in which would-be brides prepare their wedding, and their proposal, and then pop the question on air

Marry Me Now is borne out of Armoza's annual Formagination formats competition. Comedian Odelia Yakir successfully pitched the idea and presents the pilot of the show, in which women prepare for their wedding over a three-day period. The twist is the groom does not know what is happening, with the would-be bride popping the question, on air, in the final part of the show.

If the answer is yes then the couple proceed directly to the wedding ceremony and reception. Each one-hour installment will feature one couple's story.

"It is empowering, showing decisive women who aren't waiting any longer for someone to propose to them," says Avi Armoza, Armoza's founder. "They are preparing for a wedding without knowing their partner's answer, and there is an element of humour in that, but overall it is a very strong human drama."

Having triumphed at Formagination, *Marry*

Me Now was worked up by Armoza Formats and Zipi Rosenblum, a former Formagination winner and the creator of *Couch Diaries*.

The host, Yakir, provides the bride with emotional support and also keeps the wedding planning on track as the event takes shape over the three days.

Marry Me Now will be entering a market well-stocked with wedding formats, from the stalwarts such as *Don't Tell the Bride*, *Bridezillas* and *Say Yes to the Dress*, to newcomers such as FremantleMedia's *Say Yes – Four Proposals* and a *Wedding Dress* and edgier offerings such as *Married at First Sight*.

"The fact there are a lot of [wedding formats] prove it is a relevant topic," says Avi Armoza. "We are coming with a fresh perspective, this is an up-to-date format where the bride takes control."

Armoza launches the format at NATPE, before taking it on to Realscreen and then MIPTV.

THE SHOW: *Fit to Fat to Fit*

THE DISTRIBUTOR: A+E Networks

THE PRODUCER: Renegade 83, Gaspin Media

THE BROADCASTER: A&E Network (US)

THE CONCEPT: Personal trainers pile on the pounds to better understand the weight-loss journey

The experience of personal trainer Drew Manning is the inspiration for A+E Networks' new weight-loss format *Fit to Fat to Fit*. Manning realised there was a disconnect between him and his out of shape clients, so he deliberately piled on 75 pounds in order to understand the process of moving from fat to fit.

From *Naked and Afraid* prodco Renegade 83 and former NBC entertainment boss Jeff



THE SHOW: *Who's On Top?*
THE DISTRIBUTOR: Keshet International
THE PRODUCER: Flare Productions Israel, July August Productions
THE BROADCASTER: Keshet (Israel)
THE CONCEPT: Variety gameshow in which celeb contestants in pods are propelled up or down a five-storey tower as they answer general knowledge questions

Who's On Top? is billed as a variety-gameshow, containing, as it does, the Q&A stylings of the latter, but also the pizzazz and humour of the former.

In Israel the 6x60mins series recently ended, commanding a 30% share. The format was co-developed by Keshet and Flare Productions, the prodco behind *The Vote*, one of Israeli shows that started the country's formats exports boom when it sold to ITV in the UK.

In the original Israeli incarnation, celebrities take part in a general knowledge quiz over three segments. The celebs are in 'air pods' that can travel up or down a huge tower in the studio; they are powered upwards for a correct answer and down if they answer incorrectly.

The variety element comes as videos are played and guests brought in to accompany the questions – the country's tallest man making an entrance for example for a question about his height.

Keshet International is bringing the series to

market and will be shopping it to buyers at NATPE. Keren Shahar, managing director of distribution, says the first deals for local versions of the show will be announced soon.

Despite the eye-catching studio set, the format is scalable. "It looks like a million bucks, but it doesn't cost a million bucks," Shahar says. "Constructing the set is not an enormous cost, and you could also strip it down, take out the celebrities and run it as a fast-paced quiz."

The ability to run it as a straight high-stakes fast-paced gameshow makes it an adaptable format. "If you take out the variety elements it is even more scalable and could be a daily or an access prime show, but if broadcasters are looking for primetime weekend shows, then it will probably be the celebrity version they want," Shahar says.

With NATPE Miami and the Latin market in mind, the Keshet exec notes the one-hour show can be made longer to fit local tastes.

THE SHOW: *Doctor in the House*
THE PRODUCER: Studio Lambert
THE DISTRIBUTOR: All3Media International
THE BROADCASTER: BBC One (UK)
THE CONCEPT: A professional doctor lives with a family and puts right their health problems

With health a perennially important subject, All3Media International hits NATPE with *Doctor in the House*, a Studio Lambert-created format aimed at promoting healthy living that debuted on BBC One to good ratings in the UK.

"Health is universal, and in all developed territories there are issues around access to doctors," says All3 International's senior VP, international format production, Nick Smith.

Scheduled against ITV ratings giant *I'm a Celebrity, Get Me Out of Here*, its debut episode took nearly three million. "It has done really well against its competition," says Smith.

The format essentially does what it says on the tin: in each episode a professional doctor moves in overnight with a family to assess their health problems. Over coming months, they visit the family's home and workplaces to check their recommended changes are taking place. The dénouement sees the family take a health test that compares them to the national average, and it is then revealed how their lifestyles have changed during the credits.

"We all have various health issues, and doctors in the UK have been in the press so much recently with the debate around their contracts," says Smith. "Generally doctors get ten minutes with a patient, but here they get to see how people actually live. It's a bit like a health MOT."



Gaspin's Gaspin Media, the series debuted in mid-January on US cable net A&E in a Tuesday 10pm slot. Manning, who penned the book *Fit2Fat2Fit* and appeared on numerous US talkshows and news programmes to discuss his experiences, appears in the opening episode, but the series is about ten other personal trainers who embark on a similar journey from in-shape to overweight and back.

In each episode viewers will follow an elite trainer as, over four months, they stop

exercising, start eating badly and gaining weight. The physical and emotional effects are captured and, after the bulking-up period (under medical supervision), they are reunited with a client and both begin the transformation back to fit. There is no competition element, but the culmination of each episode is a weigh-in that reveals whether the trainer and client have achieved their health goals.

A+E is selling the finished version and the format. "This is a new way into weight-loss," says Ellen Lovejoy, A+E's vice president, international content sales. "It sits between a social experiment and a lifestyle show. For anyone who has battled to get fit, if you have worked with a trainer you can feel they don't always know what you are going through. Here, the trainers are not just talking about losing weight they are going through it."



THE SHOW: *Crime Scene*
THE PRODUCER: JTBC
THE DISTRIBUTOR: Small World IFT
THE BROADCASTER: JTBC (S. Korea)
THE CONCEPT: Celebrities attempt to solve crimes in studio-based gameshow

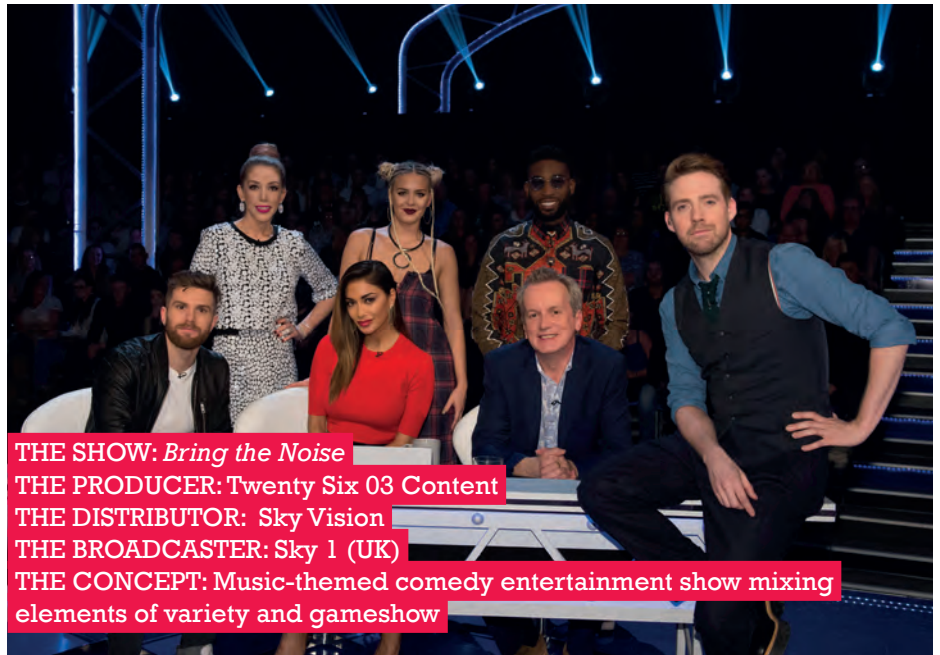
The concept behind *Crime Scene* – a gameshow in which contestants attempt to solve fictional crimes – is one that has been attempted very few times. Fox’s short-lived 2001 effort *Murder in Small Town X* is perhaps the closest example, though the core format elements differ.

Where that saw contestants attempt to solve cases in an American town with the locals were played by actors, *Crime Scene* is studio-based and has employed celebrities in its originating territory, South Korea.

There it plays on JTBC, a channel with whom distributor Small World IFT has a strong relationship. “This is a fun and unique way to do a whodunit show,” says Small World president Tim Crescenti. “Everyone likes a good crime mystery, which is why that genre does so well.”

Crime Scene sees six celebrity contestants attempt to solve a crime mystery through a series of role plays. One is secretly designated ‘the criminal’, and it is their job is mislead the others. If they are successful, they keep a cash prize to themselves, or the reward is shared between the them for a correct guess.

“This is not morbid or bloody, but fun,” says Crescenti. “You’re asking regular people to suspend reality and pretend to be part of a crime.”



THE SHOW: *Bring the Noise*
THE PRODUCER: Twenty Six 03 Content
THE DISTRIBUTOR: Sky Vision
THE BROADCASTER: Sky 1 (UK)
THE CONCEPT: Music-themed comedy entertainment show mixing elements of variety and gameshow

Bring the Noise, according to Sky Vision’s director of factual and entertainment, Barnaby Shingleton, brings “the best of the music entertainment genres” together.

“At one end of the spectrum is *The X Factor* and at the other end of the scale you have got *Lyrics Board* and *Never Mind the Buzzcocks*,” he says. “This sits in the middle of those two examples.”

The show is a mesh of TV staples: a panel show, shiny-floor series, music programme, and light entertainment variety format. It includes performances from chart toppers, celebrity guests, musical set-pieces, spoof video parodies, trivia rounds and mash-ups.

In the original Sky 1 show, pop star Ricky Wilson presented, with singer and former *X Factor* judge Nicole Scherzinger, comedians Katherine Ryan and Joel Dommett, and British rapper Tinie Tempah the weekly celebrity panellists. They perform in a studio set designed to look like a music arena, with a house band performing each week.

“The talent is equivalent that in the big talent formats, but this doesn’t have that very highly-produced narrative you get in *The X Factor*, which audiences seem to be getting wise to,” said Shingleton. “With this, you get more variety. That’s interesting to broadcasters, who are interested in music shows of scale.”

The format also marks an early commission for Twenty Six 03 Content, the UK producer that former Sky entertainment

commissioner Duncan Gray launched. Shingleton says the show was ordered after Sky 1 director Adam MacDonald had “wrestled for some time” with finding a suitable new music format for primetime.

The format came under fire when FremantleMedia wrote to Sky questioning alleged similarities to a show pitched to Gray while he was at the UK satcaster, but those claims have been strongly rebuked and no formal allegations have been made.

Debut ratings in the UK gave Sky 1 a 1.2% share in a 9pm slot.



THE SHOW: *My Diet is Better Than Yours*
THE PRODUCERS: Kinetic Content, Milojo Productions
THE DISTRIBUTOR: Red Arrow Int’l
THE BROADCASTER: ABC (US)
THE CONCEPT: Reality competition in which overweight contestants partner with diet experts to shed weight

Available for the first time at an international market at NATPE is brand new format *Wonderkids*.

Originally made by Nordisk for DR in Denmark, *Wonderkids* is a live, primetime entertainment family show, which follows the efforts of gifted children.

From an early age they have revealed a huge talent, such as playing the violin, performing classical ballet or singing opera, and here they take part in a series of challenges to extend their ability even further, to become the ultimate 'Wonderkid'.

The show is being distributed by Banijay International, which is bringing the Nordic talent show to market.

The talents of the kids featured lie in classical fields and the kid contestants are paired with

a specialists in their field, who partners up and mentors them ahead of a studio performance.

"It's showing kids at the top of their game, it's not about discovering new talent," says Banijay International managing director Emmanuelle Namiech. "It's about celebrating and supporting kids that already have a [recognised] talent."

The kids perform in front of a three-strong judging panel – with two regulars and a weekly guest judge – in challenges designed to stretch their abilities.

The winning *Wonderkids* each week then progress to a live studio final.

"The kids are classical artists, but this is not highbrow or elitist; it's genuinely feelgood," says Namiech.



THE SHOW: *Wonderkids*
THE PRODUCER: Nordisk
THE DISTRIBUTOR: Banijay International
THE BROADCASTER: DR (Denmark)
THE CONCEPT: Shiny floor entertainment format highlighting the classical skills of gifted kids

The original version of *My Diet is Better Than Yours* debuted in the US on broadcast network ABC as *Diet Wars* on January 7. Coming through Red Arrow Group's US producer Kinetic Content, it has been scheduled for those looking to shed the extra pounds gained at Christmas.

"The show is incredibly timely: diet fads, life coaching books and health tracker apps are all the rage but what actually works," says Harry Gamsu, VP, format acquisitions at Red Arrow's sales arm, Red Arrow International. "This format puts them on trial for everyone to see."

The structure sees five overweight contestants matched with five diet experts, each of whom has their own unique weight loss method. The pairs work together over 14 weeks to improve the contestant's physique. If they clash, the contestant is allowed to

ditch them and partner with a new dietician.

At the end of the season the contestants participate in a half-marathon, which they must complete in order to get to a final weigh-in, and the focus is on the strength of the diet plans rather than the reality elements.

"We want a holistic, full 'body and mind' overhaul," says Gamsu. "This is a lifestyle format first and foremost; it isn't all about losing weight. No contestant will be eliminated and left behind on this show."

The ABC show will sit alongside big hitting lifestyle formats such as *The Biggest Loser* and *Extreme Makeover: Home Edition*, which gives it credibility but also ratchets up the pressure to do well.

"In a crowded EPG this is a great addition to ABC's line-up as a big family-friendly entertainment format," says Gamsu.



THE SHOW: *Ciao Darwin*
THE PRODUCER: R.T.I. Mediaset
THE DISTRIBUTOR: Kabo International
THE BROADCASTER: Canal 5 (Italy)
THE CONCEPT: Primetime show in which different categories of people compete against each other

Arabelle Pouliot-Di Crescenzo, Kabo International's managing director, says she first saw *Ciao Darwin* over a decade ago. Fast forward to 2016 and her company has picked up the rights and is taking the format to market.

The show hails from Italy where it is on Mediaset's free-to-air channel Canal 5 with season seven launching in March. It pitches contrasting groups against one another – men vs. women, young vs. old, bald vs. hairy – in an attempt to discover, in true Darwinist fashion, the best designed members of the human species.

"Each of the groups is represented by a celeb and [producers] can choose the categories to tap into the zeitgeist," says Pouliot-Di Crescenzo.

The final segment sees a representative of each group face off in a head-to-head in which they are in a cylinder that fills with water when they incorrectly answer a question.

Kabo has been bringing classic formats to market such as *Who's Who* and this is the latest in that line.

The format has been sold into some international territories before, including Greece and Poland, but Kabo is giving it a full international launch, with the sales effort underway at NATPE.

"It's a big party basically – a tongue in cheek format that has an amazing track record in Italy, where it is a huge show," says Pouliot-Di Crescenzo. "We have a detailed promo and not all of the elements in the Italian version need to be included internationally." **TBI**

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LAST WORD



MILES WEAVER

MCNs should go beyond YouTube

With the top ten multi-channel networks on YouTube generating 370 million views in the first week of August 2015, most would agree that the partnership between YouTube and the world's most successful MCNs are striking many of the right cords.

The nature of the relationship between video platforms and the highly specialised 'talent agents' that work across their channels would best be described as symbiotic: YouTube, along with user-generated platforms such as Dailymotion and Youku Tudou, offer huge audiences keen to feast on the vast and varied range of content that is constantly being uploaded. In turn, MCNs deliver greater organisation to the platforms, driving opportunities across the wider web to create sustainable online-video careers.

Yet, in the past few years there has been a noticeable shift in the way that the industry views the growing potential of MCNs, as they gain increasing recognition for their expertise in online talent acquisition and development. Last year, Disney paid US\$500 million (potentially rising to almost US\$1 billion) to acquire Maker Studios, highlighting the growing importance of the MCN business model and market confidence in its long-term profitability.

Up to this point, MCNs have trodden a relatively gradual path towards maturity, but an accumulation of factors are now pushing them and their talent to take a more proactive approach to extending their online presence. One such incentive has been the increasing accessibility of technologies that, with the right business model and technical expertise, enable businesses to build a successful platform from scratch, establishing, cultivating and giving real identity to the brand and talent it supports.

The opportunity to generate greater

revenues from direct-to-viewer platforms, to gain the finances for re-investment into more professional production, to reclaim control of their own content and to embed ad opportunities that better meet the audience's specific needs are other, equally compelling reasons.

However, there is also another simple, yet crucial motivation driving savvy MCNs to look outwards: capturing the attention of a growing pool of millennial viewers that are searching beyond established platforms like YouTube.

With this in mind, content network giant Endemol Beyond USA recently launched a new direct-to-consumer platform, GetBeyond.US. The new website, designed and developed using Pikel Hive, features video content from the likes of the wildly popular Michelle Phan, mainstream celebrities like Pitbull, and Vine star Brittany Furlan.

Putting all that content in one place offers a single point of engagement for Endemol Beyond USA, offering a prime example of how MCNs can maximise the value of their talent and content to meet the increasingly diverse preferences and expectations of today's online audience.

The MCN direct-to-viewer model offers a highly-tailored and purpose-built space to increase direct-engagement with consumers, offering behind-the-scenes, long-form, and exclusive content via a platform that carefully aggregates, engages and evolves alongside its audience. As a result, MCNs can greatly expand revenue opportunities and drive up customer satisfaction, simultaneously addressing the inconvenience of content and platform fragmentation.

Another important benefit of having a dedicated video hub is that it allows the MCN to regain control of its own content. When content is syndicated to different platforms like YouTube, Vevo or Dailymotion, the ability to control how their content is showcased and retain revenue for eyeballs is greatly diminished.

The risks of brand damage are heightened when related videos or ads that are directly opposed or unsavoury (adult-themed related videos placed next to kid-friendly content, for example) are presented to the viewer.

This concern becomes increasingly valid as the sheer amount of content, and the sophistication of trolls and malicious users, increases. Thus, to be able to control not only the content itself, but the items and ads that appear around it can offer piece of mind for an MCN.

Moving forward, creating the means to exercise greater control over the way content is discovered and delivered should be at the forefront of every MCN's audience engagement and monetisation strategy. MCNs that invest in their own channel have the opportunity to build hyper-personalised functionality into their design, taking into account viewer preferences into the user interface, advertising, personalised notifications and improved content discovery; all things that are currently not possible when syndicating to third-party platforms.

The MCNs that focus on continuously adapting to changing consumer demands have a far greater chance of retaining viewer loyalty, and profitability over the long-term.

The partnership between YouTube and MCNs will continue to launch an infinite number of successful video personalities and media careers, driven by the mutually beneficial relationship that has created the high-value platform we know today. However, MCNs should also embrace the opportunity to increase their presence and improve their audience's experience by establishing avenues for direct engagement.

The future holds great promise for MCNs that are able to leverage the expanse of the media landscape and drive partnerships across the broadcast, OTT and social media spaces, while providing a purpose-built platform for their own talent to shine. **TBI**

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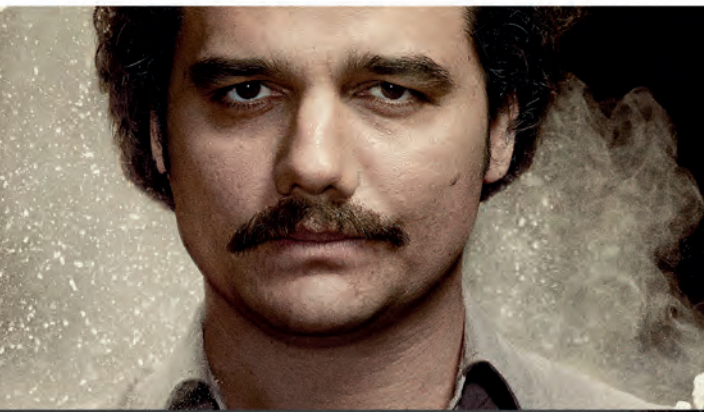
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