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TVKIDS

Summer Festival

**EXCLUSIVE
WHITE PAPER:
KIDS' MEDIA
TRENDS**

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Introduction

Generation Alpha may be unlike any other demographic kids' media executives are used to catering to. Most are spending at least part of their busy days on gaming. And they're consuming all kinds of content, from the beautifully animated, expensive-to-make shows on broadcasters and streamers all the way through to made-on-a-shoestring-budget videos found across the creator economy.

The third edition of the TV Kids Summer Festival featured valuable insights from those working across this ecosystem. We've compiled the key takeaways into this exclusive white paper.

If you missed any of the sessions live, you can access the entire festival on-demand here: TVKidsSummerFestival.com.

The View from Disney

Insights from:

Ayo Davis, President, Disney Branded Television

Watch it [here](#).

Davis leads all operations for Disney Branded Television, the unit of Disney Entertainment that produces content for kids, tweens, teens and families for Disney+, Disney Channel and Disney Junior.

Something for everyone is paramount:

“We have this huge slate that helps serve a global audience from preschoolers through adulthood,” Davis said. “All these shows are filled with signature Disney qualities of magic and wonder, adventure and heart, with heroic characters that are relatable and reflective of the world that we live in and are truly guided by kindness and understanding, respect and optimism. Music is so integral to our storytelling. It’s about creating stories and characters that encapsulate the best of Disney, forge deep emotional connections that stay with the hearts of our audiences for their entire lives.”

Linear first? Streaming first? It depends:

“When I think about linear networks, we’re looking for shows that are highly repeatable. They lean into comedies. We give an emphasis

on all multi-cams and music always, and ultimately, it's our volume play. When we're thinking about Disney+, the storytelling here always appeals to our broader audience and has that sort of premium wow factor. We tend to do more limited episodes, and depending on the story, we'll do an all-at-once drop or week-over-week cadence."

As for different viewing patterns on linear versus streaming, Davis commented: "We've never really had a hit show on one that wasn't a hit on another platform. That being said, though, our approach to launching a linear show is different. In our linear launches, we can lean into scheduling, stunting and on-air promotion to drive sampling and awareness. For Disney+, you have to be clever because it's really about the pure marketing of the title."

From Star Wars to Spider-Man, Disney is working to ensure that most of its core franchises can extend to multiple demographics:

"We've had great success with our Marvel and Lucasfilm partnerships. We've focused primarily on preschool and kid audiences. We're providing these early entry points into these beloved franchises and characters. So very early in the process, we work closely to ensure that we combine their deep knowledge and expertise about the characters in their canon with our decades of experience in creating and engaging in trusted stories for kids."

Diversity and representation run across the entire slate:

“We spend a lot of time thinking about the power of storytelling. Our focus at Disney Branded is to create entertainment that allows our audiences to see themselves authentically reflected in our magical and optimistic stories and characters. When people see themselves reflected in our stories, the stories of magic and wonder and adventure, that’s powerful stuff.”

AVOD Platforms: What Are They Buying?

Insights from:

Brenda Bisner, Chief Content Officer, A Parent Media Co. (APMC)

David Di Lorenzo, Senior VP, Kids & Family, Future Today

Maggie Salas-Amaro, Director, Canela Kids

Daniel Nordberg, Founder, Playground TV

Watch it [here](#).

Kids' ever-evolving consumption habits, inflation and overall price-of-living increases all bode well for the AVOD space:

“There’s a lot of subscription cutting,” said Bisner. “There are issues with the economy. There is a desperate need for content with no barrier to entry for kids and families globally. The drive for kids’ AVOD comes from parents being younger and having grown up with the internet and, of course, knowing the dangers that kids can face online and making wise decisions and researching where their children can safely view content.”

Di Lorenzo: “It is about transitioning audiences. In the U.S., we lost about 6 million subscribers on cable and satellite last year. There’s been a paradigm shift in where audiences are going to watch content. Streaming is where they find most of their content.”

Content strategy at Future Today’s HappyKids:

Di Lorenzo said HappyKids has been “aggressive in acquiring content. Kids are watching a lot of different types of formats, a lot of different types of content. We’ve got a mix of studio-produced

content, YouTube influencers, UGC, gaming. We have very strict standards and practices, making sure that we have a safe environment for kids to watch this content. Last quarter, we brought in about a thousand half-hours.” Of that lineup, about two-thirds was studio-produced content from global producers. “The rest of that was YouTube content. And that was just in terms of new IP. We’ve got monthly refreshes coming in from partners like Moonbug and others who are bringing in new content on a monthly basis.”

Live action and movies are on Di Lorenzo’s wish list. “We’re also looking for new ways to work with partners, whether that is a spin-off series or something that maybe is exclusive to our audience. It’s working with partners to find new ways to bring exciting content around a brand they’re already familiar with. We’re 0 to 12, but our focus lately has been on juggernauts in the preschool space, whether it’s *CoComelon* or *DuckTales* or *PAW Patrol*. We’ve got a very strong presence in preschool. One of the challenges for us is trying to find that older audience content.”

Content strategy at Canela Media’s Canela Kids:

The service targets the U.S. Hispanic population and audiences across Latin America and is acquiring across a range of sources, including the ubiquitous Moonbug Entertainment. “We took advantage of the fact that they had new content coming in that wasn’t available on other Hispanic streamers,” Salas-Amaro said. “We were able to capitalize on that. We’ve rolled out anywhere from 1,700 to 2,000 hours in the last year. We have about 3,000 hours right now on our platform.”

“We want to tell stories from a kid perspective,” Salas-Amaro noted. “I think we need to be telling more stories about culture. I don’t see that out there. We’re not looking so much for preschool. We’re looking more for 7 to 9 and family-oriented titles.”

Content strategy at APMC’s Kidoodle.TV:

Kidoodle.TV has been in operation since 2012 and, as such, has a “robust catalog,” Bisner noted. “We’re serving kids under 12 in 160 countries. It’s curating the biggest brands in the world. It’s not a quantity play but a quality play for us. We want partners that care about that mission and what we’re doing to better the children’s experience online around the world, matched with philanthropic endeavors. We want partners who are going to talk about being on Kidoodle.TV. We want brands that will plant the seeds and continuously water the plants. We have a backstage analytics portal, which is very transparent, and it’s quality revenue. We want our partners engaged. This is a relationship, and that’s very important in AVOD.”

Bisner added that IP owners doing business in the AVOD space need a “social strategy. With the right execution, it does help elevate a brand.”

“We’re not just looking for back catalog,” Bisner said. “We’re looking for brands with significant awareness and partners that are engaging.”

Content strategy at Playground TV:

The platform focuses on multilingual content for its European footprint. “We’re looking for the European favorites,” Nordberg said.

“*Barbapapa* in France, *Fix and Foxi* in Germany; they resonate with parents. We’re going after classics and newer productions of those.”

Known franchises in AVOD are key. As is diversity:

Salas-Amaro: “It is important to showcase well-known franchises to both the kids and the parents. We promote our space as safe, 100 percent in Spanish and an always free environment for our families.”

Nordberg: “Getting multilingual content throughout Europe is a key driver for growth in this region with all the different languages you have across Europe.”

AVOD deal structures are in flux, as is the approach to exclusivity:

HappyKids is doing flat-fee licensing, advanced minimum guarantees and revenue shares. “It depends on the content, the exposure the content has across other platforms and how well it’s known across our audience. There’s no one set structure for us. We want to bring partners in and make sure that we do the best job we can to support their content, make sure that their content is seen and that it’s given an opportunity to shine on our network.”

It’s a similar situation at Canela Kids. License fee models are preferred over rev-shares, “unless it’s a FAST opportunity. A minimum guarantee depends on who it is. It depends again on the property and what it will bring to the platform ultimately.”

“Being a young company, it’s fairly expensive to build a good content portfolio,” Nordberg said. “We are limited, and we only do

revenue-share deals with no minimum guarantees. That's our structure to build our portfolio."

APMC is a tech company, Bisner said, with the ability to accurately measure how shows are faring. "Estimations can be made around brands that we know have already been successful with us. We pay a CPM rate that's not advert dependent, and all of our adverts are vetted for kids and not interrupting the show, which we are very serious about. We have been a new revenue stream for a lot of people. You want eyeballs and revenue, right? You want to reach kids, and how you're reaching kids should matter. Just putting it anywhere and not knowing what it's sitting next to, what it looks like on the service and how other things may be found are considerations that need to be put on the table before making any deal. We feel we have a very fair deal structure. Every conversation has to be different, especially the bigger the brands are, especially what their needs are. It's a dialogue."

On the role of exclusivity in AVOD, Bisner noted, "There's no such thing as exclusivity in AVOD. We have a lot of similar brands. We all know the same people. So how is it going to be different for David? How is it going to be different for me? How is it going to be different for Maggie and Daniel? That's important. What's that conversation, and how are the two companies going to cross-promote in a way that's going to make sure it has exposure and people are going to go there to watch it? That's the bottom line."

Salas-Amaro agreed, adding: "When we acquired the Moonbug package, it was on another Hispanic streamer. But since we had done a deal after they did their deal, we got new stuff. That was the competitive advantage that we had. CoComelon is all over the

place, and so are the other shows, but we're coming in with new seasons, and we had two new shows that were not part of the package that another streamer had. Now their license is over, and we are the ones that are owning the space."

"We work toward exclusive packages in some instances," Di Lorenzo noted. "Some of this content is across multiple platforms, so whether it's an exclusive special or something we can say to our audience, we're bringing something new to you that's different. Future Today is a publisher of apps. We publish apps for a lot of different brands. So it may not be exclusive content, but we're the largest place to find that content. Whether we're talking about the LEGO app or the CoComelon app or the Blippi app, these are destinations that have an entire portfolio of content. In that respect, it's not necessarily exclusive, but it's the destination hub to find everything under a specific brand."

Exclusivity doesn't "go hand-in-hand with a revenue-share model only," Nordberg added. "Exclusivity demands some kind of commercial commitment, which we are too young to take on board."

Engagement and discoverability remain significant challenges:

"What is toward the front of any row is going to get more attention than anything that is passed the fifth or the sixth poster," Salas-Amaro observed. "It's the same with the linear [FAST] channels."

Di Lorenzo agreed, noting that it's generally the "usual suspects"—well-known brands—that kids will flock to. "We try to make sure that we're promoting these shows by using banner ads and billboards in different spots. One of the great things about AVOD is that

we do have the ability to have a large catalog of content that allows our users to search and find things. It's nice to have a lot of content available for kids to watch because they want to explore. This platform allows us an opportunity to create an environment to find a little bit of everything you want to watch.”

Bisner added: “Shows have to compete against the usual suspects. *Peppa Pig*, *PAW Patrol*. How are you going to hold up? It goes back to that social strategy and that brand packaging and how it is special for being on that platform.”

She continued, “Long-form content is the bastion; it's sticky. It keeps kids there for longer. Retention is very high. That's important for us. We're looking to make time and space for the brands that will come out and do well and then invest more time into the ones that are doing well and adding more.”

FAST channels are an increasingly important tool:

At Canela Kids, “We premiere some of the titles first on the FAST channels and then we move them on to AVOD,” Salas-Amaro explained.

Di Lorenzo said Future Today operates a range of FAST channels and brought a FAST experience into the HappyKids AVOD app. “The FAST channels we're launching are branded around a specific brand. Kids are not a lean-back audience; they lean in, and they want to watch what they want to watch. We've got about ten FAST channels in HappyKids right now, and we plan to expand that because we've seen that our audience is gravitating toward that viewing experience.”

Kidoodle.TV is also operating in the FAST space, Bisner said. “We’re looking back at traditional models of television programming. How can we update it? We’re looking at day-parting. What can we bring to an audience in the morning, afternoon, evening and then on the weekend to make it special? What kind of promotion can be done around that? We’re exploring how we can show up in a way that is more eventized and leads to some social cross-promotion.”

AVOD originals are happening, slowly:

Salas-Amaro said Canela Kids’ move into that space was a natural evolution given the investments its parent company, Canela Media, has been making in Spanish-language content across its portfolio.

Kidoodle.TV has also been investing in originals. “We’re not someone you would call for co-production or gap financing,” Bisner said. “Our originals are made in-house with our incredibly creative team.” She added: “We’re taking very analytical approaches to our decision-making there.”

Similarly, Di Lorenzo said HappyKids is not at the point where it would “co-produce a studio-produced show. That’s something we’re interested in exploring, but not sure 2023 will be that year. We work with many gamers and have a lot of user-generated content. It gives us an opportunity to create thematics around some of this gaming content, as well as making sure that it fits into our standards and practices.”

Nordberg said that Playground has been exploring the AI space. “At the beginning of this year, we started to develop another service

called Storyplai where users can create their own stories. These are right now audio-only, but it's really interesting what you can do with a tool like that. For us, AI would play a bigger part in our future when it comes to producing original content.”

Decoding Gen Alpha

Insights from:

**Evan Shapiro, Media Cartographer, Executive Producer,
Podcaster, Professor**

Watch it [here](#).

If you're not paying attention to how much time kids are spending on gaming, you're missing out:

“The one thing that Generation Alpha says that they do every day is game,” Shapiro said. “Seventy percent of kids between the ages of 8 and 15 say they game every single day. It’s not just gameplay. A tremendous amount of the time is social. There is a metaverse that’s taking place on Roblox, on Minecraft and Fortnite and PUBG. That is part gameplay, but a good deal of this is a new version of social media. If you want to see where Web 2.5 is taking shape, it’s in these fully functional, always on, with their own economies, platforms that we call games that are much more than that.”

It’s all about yes/and:

“When you look at where they spend their video time, increasingly there’s this ‘yes/and’ point of view among all consumers, but especially among those under the age of 20. YouTube is one of the first places that they’ll go for video content. Netflix is the second place. Twitch is a place that they spend a tremendous amount of time, but

then also Disney+. There's this real acceptance of the idea that I'm going to jump from free media on social video to premium video on a subscription platform and back and forth. The idea that publishers don't see social video as premium video is a big mistake. They're going to miss a whole generation if they don't pay attention to social video consumption, which younger consumers see as equal to premium video. The amount of time that young people spend on Twitch, YouTube and TikTok and all these other social media platforms is really important to pay attention to."

No, young audiences don't just want free content:

Shapiro referenced a study done with Publishers Clearing House showing that 64 percent of people under the age of 34 are willing to pay for content. "If you have a child under the age of 15 and you've ever seen charges from Fortnite or PUBG or Minecraft or Roblox, you know that these generations are very willing and able to pay for content, whether it's their own money or their parents' money."

Shapiro continued: "When we asked these consumers under the age of 34, what are they planning to do in the year ahead with their subscriptions—across audio and video and other areas—41 percent said, I'm going to pay more to get rid of ads. That doesn't mean that they won't watch free stuff with ads, but their intention is, as they get resources, to create environments where they're ad-free because that's seen as a better experience. The content still is king,

and you have to think like these young consumers if you're going to get inside their minds, their pockets, their eyeballs."

So, you have a piece of beautifully made, "traditional" IP, not a video game or an influencer. What do you do to help kids discover your brand?

"If you own a really big brand like Snoopy or Teletubbies or something like that, it makes a lot of sense to make a deal with an Apple or a Netflix because they're going to pay you enormous sums of money to get exclusive access to that intellectual property," Shapiro said. "However, if you're an IP rights holder or a producer of content, 50 percent of the value that you're going to get out of your intellectual property from this point forward is going to come from what most people call the creator economy, but what I call the community economy. One of the most important tenets of Web3 is the relationship between the publisher or the artist and their audience, their community."

If you focus solely on the "gatekeeper economy," Shapiro said, "you're going to leave so much of your relationship with your audience and the value you can get out of your intellectual property if you do not practice in the community economy."

Shapiro urges IP owners to have a presence on a platform like YouTube, TikTok, Fortnite or Snapchat. "Launch the content there, in short periods, get data in, A/B test, understand what works,

understand what doesn't. More importantly, establish the IP and the relationship and the cult around the intellectual property on these other platforms before you start to try to extract the value from the gatekeeper economy. If you walk in the door with an existing piece of intellectual property that has an engaged audience or community already on your side, you're going to get so much more value and you're going to offer more value. I can drive an audience to your platform."

How do you begin to measure engagement in a fragmented market?

"Reach" is "no longer a metric" that holds significant value, Shapiro said. "First of all, we were never measuring it very well to begin with. And I don't think it's a useful metric to even concentrate on. As publishers, we invest because we're trying to either extract subscription from the user or sell advertising. Either way, those are the two metrics that matter. Is someone willing to pay and how much? And am I selling stuff? Not am I reaching consumers, but are they buying the products I'm selling?"

Managing the discoverability conundrum requires patience and creativity, because it's not going anywhere:

"We have created this series of walled gardens that makes finding content incredibly hard. We've also oversaturated the market in storytelling to a certain extent because of all these different walled garden platforms. We've created a massive paradox of choice issue

for publishers and audiences. The more choice you give consumers, the fewer choices they will actually make. I think that's why testing things out and building audience and community in direct-to-consumer relationships is incredibly important. Just because you sell a show to Netflix doesn't mean they're going to surface it well and doesn't mean anyone's going to see it. YouTube is a great platform, but it's also this firehose of content. One of the powers of TikTok is that it helps you discover things through the algorithm that is literally for you. Now it's also spyware and an addictive, depressive, mind-numbing platform. But there is something to it, which is if you understand what an audience likes, if you can build a direct relationship with a community, they will tell you what's working. They will tell you how to find more people like them. They will work on your behalf to make sure that your content is being discovered. If you operate exclusively through the gatekeeper economy, even if you're lucky enough to sell a show to a gatekeeper, the odds that it's going to get a second or third season are decreasing at a very rapid rate."

The Moonbug Model for Ubiquitous Distribution

Insights from:

Andy Yeatman, Managing Director, Americas

Nicolas Eglau, Managing Director, EMEA & AsiaPac

Watch it [here](#).

Candle Media, founded by Kevin Mayer and Tom Staggs, shelled out \$3 billion in cash and stock in late 2021 to take ownership of Moonbug Entertainment. The company has built up an enviable slate of hit properties, born in the YouTube ecosystem and subsequently rolled out to all sorts of platforms.

Building a company to be digital-first has powered Moonbug's success:

“Our whole business is set up around IP that has started, found and proven to have a big audience on a digital platform,” Yeatman said. “With the emergence of digital platforms as the primary way kids discover and engage with content, the choices are almost limitless. In a world of infinite content but limited time, brands become even more important. We’re taking this popular content that’s found an audience on digital platforms and investing time, resources, skill and money, in building them into brands and franchises for kids and families all over the world. It’s all about the audience. We’re constantly testing new things. Does this new character resonate?”

Did this type of animation, this storyline resonate? The audience is our North Star.”

“We’re constantly putting out new content,” Yeatman added. “We’re constantly looking at what the audience’s reaction is, and then fine-tuning our content strategy and our creative strategy based on that. And then we’re making shows for a global audience. We want our content to be accessible to that global audience. The fact that our content is available on the world’s biggest, most accessible platform, YouTube, is critical. We also want to work with the premium platforms to make sure that our content is also there. The combination of that intense focus on what the audience wants and is looking for, their reaction to our shows and the accessibility help make our brands some of the most popular in the world with kids.”

To the naysayers who criticize the overstimulating nature of many of Moonbug’s shows?:

“Sometimes people might have a hard time understanding the popularity of some of our shows,” Yeatman said. “We take a lot of pride in our content being popular and engaging but also enriching. Every single episode has specific values, a specific life skill attached to it. We have educational consultants, curriculum consultants and development consultants. We’re proud of the fact that it’s engaging kids.”

How do you make it into the Moonbug slate?

Yeatman: “Does it have an established audience base? It could be a popular YouTube show or a Roblox game. Does it have core values? Does it help kids laugh, learn and grow? Do we think we can help grow it substantially? Are there potential extensions for the show?”

And how do you measure success? Moonbug has built up its own data analytics team to give it the intel it needs:

“We see how people are watching our content,” Eglau said. “We don’t think data will replace creativity, but it’s great input for our creative people. We look at an IP and see how we can make it even better, grow it and distribute it. We look at the distribution situation and add new players in certain markets. Then we can create and kickstart a consumer product and experience business. That’s something we do with every IP.”

Being everywhere all at once underpins the Moonbug model:

“Each IP we acquire or build is born on YouTube,” Eglau said. “Then we want to extend the distribution. We add it to premium platforms, streamers around the world and broadcasters. As we own every IP, we have the freedom to package the content and fulfill the needs of our clients. We’re not big fans of windowing or exclusivity. If someone funds a big original, they need to have a chance to refinance that and have a certain period [of exclusivity], but even that show will eventually go to other streamers and broadcasters. We

don't want to dictate to people or households how they watch our content. Our content is for every child, every family, and we try to be across all these platforms, and our content works on all these platforms, whether advertising-funded or subscription-funded.”

Building a Kids' Powerhouse at the BBC

Insights from:

Cecilia Persson, Managing Director, Kids & Family, BBC Studios

Watch it [here](#).

BBC Studios opened its kids' and family unit in April 2022 to bring shows with the BBC stamp of approval to children's channels and platforms across the globe. Its early success speaks to the talent it has been able to attract to the unit:

Edward Barnieh leads an internal development team that has “brought an external look to the market and knowledge and awareness of people that we haven't necessarily worked with, both on the talent side and the broadcast side,” Persson said. “He's working very closely with our team to get out there and find new ideas, new approaches to content as well as talent that we hadn't previously worked with. We've also continued relationships with talent we've been working for years with, like Jacqueline Wilson, and also brought in established writers like Eoin Colfer. It's been a bit of new and a bit of continuing what's tried and tested for us.”

Supporting talent with the right resources and creative environment is paramount:

“It's very important that you give individuals the space and the support needed to realize the original idea that was appealing to us and

fit with what we needed for our slate in the first place. But then also, one of the reasons we feel that we've gotten a lot of positive interest in what we're developing is that trust that comes with being the BBC and the values that we uphold."

As is having a clear 360-degree strategy:

Setting a clear content strategy has been paramount for her unit, Persson said, working in tandem with broadcast partners, digital and consumer-products teams, "to make sure that we are pulling together and approaching the audience at the same time and harnessing what the characters and the stories are about, and making sure that we're giving the best opportunity for our shows to land when they launch or as they continue to connect with audiences. Also making sure that there's consistency in how our characters are presented and that they embody the characteristics and the joy that the shows are about, so that they connect with the audience and they recognize that thread. It's essential for this audience as they're coming up now, particularly in preschool, that they are able to connect and see the characters that they love and see the stories that they enjoy in many places, and that they can dig deeper and learn more and understand more. That sort of access is important for kids today. And that's what we're working on accomplishing with our content."

Addressing the challenges of discoverability, Persson explained: "It is about consistency and being available on a lot of platforms—being ubiquitous and working with your partners to make that

possible. Parents and kids are expecting games, YouTube short content compilations. It's that consistency of delivering the characters and the stories across all those different mediums. You can build the perfect storm so that you are cutting through in this fragmented environment."

Co-productions remain central to funding strategies:

"We want to connect with audiences globally. It's really important that you have a partner that can bring that editorial input that connects with an audience. So you don't sort of get too focused on what you know and where you come from. We also work on co-productions with independent producers. It's about finding the right partnerships to get that editorial execution, but also to think about a broader market than potentially where your original talent is from."

Inside M6 Group's Cross-Platform Offer for Kids

Insights from:

Maud Branly, Children's Acquisitions Director & International TV Channels Children's Programming Director, M6 Group

Watch it [here](#).

Branly's remit covers free, pay and on-demand offers, including the DTT channel Gulli, which leads the French kids' market, and the M6 Kid morning block. In the pay-TV space in France, Canal J serves the 6 to 10 set, while TiJi targets kids 3 to 7. Internationally, there are Gulli and TiJi services in CIS and the Baltics, with TiJi skewing slightly younger than its French counterpart. Gulli Girl features animation and live-action content. There's also a Gulli Africa channel and Gulli Bil Arabi across the Middle East.

The rights' ask is evolving as Branly looks for content to deploy across the portfolio she oversees:

“It is now more and more important to acquire ‘deep rights’ and to be able to propose the right combination between linear broadcast and nonlinear exploitation. We are looking for content that we can exploit across all our platforms without limits.”

Addressing the issue of exclusivity, Branly said: “It is essential for us to propose exclusive content for kids that they will find only on our

channels and services. So yes, we are taking exclusive rights wherever we can and covering broader usage across VOD. Having said this, if a show is outstanding and already on pay TV or a [digital] platform, we are happy to be part of it anyway. We work on a case-by-case basis and have different approaches depending on the program.”

The range of styles and demos she’s seeking content for is broad and covers live-action and animation:

Gulli is home to several originals, as well as global franchises such as *The Loud House*, *Pokémon* and *Alvinnnn!!! and the Chipmunks*. “We are looking for shows that fit the Gulli DNA: comedy, laughter and based in reality so kids can recognize themselves.” Animated comedy is a key priority, but as the “positioning of Gulli is to target all the kids from 4 to 12, we’re also looking for preschool shows, live-action series, action-adventure, girls’ shows; we want to keep offering all kinds of content to our audience.”

For TiJi, Branly is focused on upper preschool shows targeting kids 5 to 7. “The channel is slightly more girly,” Branly said, with top performers like *Polly Pocket* and *Spirit*, but she is keeping an eye out for gender-neutral content.

Canal J is an “action/adventure channel,” Branly said, serving as home to properties like *Pokémon* and *Power Rangers*. “We have a lot of big franchises.”

Across the board, “it is important to have a lot of volume,” she said. “It allows us to create big blocks of programs in the grid, and we can create brands in the long term.” Acquisitions that can run across the company’s geographical footprint are also important for Branly, she said.

Local acquisitions are key for the international channels:

Each of the international channels is “tailor-made” for its local audience, Branly said. “We adapt the programming grid to the kids’ habits and school rhythm, and we acquire local content. On Gulli Africa, it’s 30 percent African content. So it’s finding the right balance between French animation, international blockbusters and local content.”

Being in the free AVOD space, including YouTube, is important:

“We are assessing all our rights situations and working on a strategy to develop our presence on [YouTube]. We are looking at YouTube as a platform to bring our content to an even wider audience in a different format. For Gulli, it’s a great way to propose a complementary offer to our linear channel, as we want to provide lots of unique content that is not available on our other platforms.”

Branly also highlighted the success of Gulli Replay, its catch-up service. “Last year, we started to make AVOD acquisitions not

related to linear rights; it worked very well. So acquiring for and developing the AVOD offer is definitely a priority for us.

“For example, last year, we acquired a few shows for toddlers and serialized live-action series for kids 11 to 14. All these shows fit Gulli’s DNA, but they are more adapted to nonlinear exploitation.”

FAST Facts: Success Strategies for Working with FAST Channels

Insights from:

David B. Williams, Senior VP & General Manager, Channels, pocket.watch

Lara Ilie, VP, Revenue Share & Transactional, WildBrain

Watch it [here](#).

WildBrain began its FAST channel business with Roku, growing that slate to 12, with another one on the way. Overall, the company now has almost 60 channels across the U.S. and Europe. Pocket.watch currently operates two FAST channels, one serving as a companion to its SVOD service.

Why you need to be in FAST: revenues are small but growing, they serve as additional promotional heft when you need it, and can foster significant brand loyalty via single IP channels.

“We look at the FAST channels in a lot of ways as a platform for driving awareness and excitement about our SVOD platform,” Williams said. “But then also our other businesses: the consumer products and the games. It also helps create market enthusiasm for all of our brands and all of our lines of business.”

At WildBrain, the focus has been on single IP channels. “We have a healthy dynamic with our distribution arm,” Ilie said. “You’ll have a

hard time finding a traditional broadcaster willing to buy 365 episodes of *Teletubbies* and air all those episodes. That left us with a lot of our beloved franchises that have found a new home in the FAST world. They thrived in this world.”

Williams highlighted pocket.watch’s role in the creator economy, bringing YouTube-originated content into “much more premium environments. FAST channels look and feel like traditional television. So from the parent optics and the business-to-business optics, it elevates the quality and perception versus just being on YouTube.”

He added that FAST channels present an “opportunity to eventize launches and bring shows to market in an exciting way that can be part of a broader life cycle for our programming.”

The U.S. is the hub for the FAST market currently, but opportunities are expanding, with partners you already know:

Ilie expects Europe to soon catch up to the U.S., with one key difference: “The FAST channels in the U.S. started and still reside within the CTVs and the free AVOD apps. Europe is taking an already baked-in concept and making it available as an option to already well-established local broadcasters who put FAST channels on their sites, which is a completely different method of exploitation than how it started in the U.S. That’s not to say that the CTVs of the world are not going to try to get their market share in Europe as well; they are. But if you think about it, a TF1 or an ITV has already a built-in

audience and advertising, so if they're going to launch FAST channels within their own experience, they're going to have more viewers than anyone entering the market fresh."

Where's the money? It'll come to you, in a range of different ways:

"When it started there were really two basic models: rev share and inventory share," Williams explained. "We actually have a really healthy and growing ad business. We've got this terrific opportunity where we can work with our creator providers and their YouTube channels and create custom content. And then we have direct sales rights into YouTube and YouTube Kids so we can build these great media plans around custom content. Then we can extend those media plans into our FAST inventory and our other OTT inventories. So it gives us a great engine to monetize inventory. We were going pretty deep in inventory shares where we could get them. Especially in the long term, that's where the biggest opportunity is. A lot of platforms don't want to do inventory shares, so you limp along a little bit with a rev share that ends up not being the greatest yield in the world!"

There are other models emerging. "We're going to be extending our channels in a new way where we're going to get essentially carriage fees. It will be part of a subscription tier and ad-free, so technically not FAST, but we're looking at subscriber fees. We've even done fixed-fee licenses, and that was in an international territory because those international economics can be super challenging."

WildBrain has also operated across inventory share, rev-share and license fees. “We also have our own ad-sales team that has been focused on selling our YouTube content and now are looking into selling CTV ads from our FAST channels,” Ilie explained. “The one thing that’s very important for us is access to analytics. The revenue model that we choose comes hand-in-hand with certain perks or disadvantages. When it comes to license fees, they do their math pretty well. It’s somewhat in keeping with what we would have made ourselves if we were to go on a rev-share partnership. Internationally it’s a different conversation; it’s harder to go rev-share.”

Measuring success is still a challenge, even though analytics are improving. The lack of standardization remains an issue:

“We invested substantially in some proprietary tools to help normalize the data and give us a consolidated view of our whole network,” Williams said. “It’s great to get the data. Some of it is hard to interpret and the definitions are all over the map. Some give you more and some give you less. But the insights into your programming, to get that direct audience context is just so invaluable. We use it constantly to make decisions.”

Hot Properties: The WIT Kids Garden

Insights from:

Bertrand Villegas, Co-Founder, The WIT

Watch it [here](#).

“Kids watch the content, they remix the content, they co-create the content and then they rewatch this content,” Villegas said in delivering exclusive findings from The WIT on the properties making an impact with kids across social video, streaming and linear.

As we all know, kids aren’t just watching “kids” shows.

Hot properties highlighted by The WIT Kids Garden include Netflix’s *Wednesday*, with kids remixing the music from an iconic dance scene in the show. “They created new content on TikTok and other social media.”

The rise of the influencers:

James Charles, a beauty influencer, made The WIT’s selections with his 37.6 million followers on TikTok, more than 23 million on YouTube and almost 22 million on Instagram.

In a similar vein is Korean influencer Seungbini, who “mixes beauty with humor,” Villegas said, and Nikkie from the Netherlands, whose YouTube channel NikkieTutorials has 14 million followers.

“She pivoted from social media to TV on NPO Zapp,” Villegas said of the show *Nikkie’s Makeup Mansion*. “She was able to translate her social media content to a TV show with a makeup competition.”

Sports and gaming are driving viewing trends for lots of young ones:

Gaming and sports are key, Villegas said, highlighting the African animated series *Jay Jay: The Chosen One* on Showmax. “He looks like a superhero and a video game character,” Villegas said.

Moving to Twitch, The WIT Kids Garden highlights the gamers Ninja, who has 18.5 million followers on that platform, and close to 24 million on YouTube; and Spain’s AuronPlay, with more than 15 million Twitch followers and 44 million on YouTube.

Making them laugh is still paramount:

The WIT Kids Garden highlighted the NPO Zapp series *Verboden te lachen*, calling it a “smart way for a linear channel to reuse viral content and make a TV show out of it.”

“Pranks are all over YouTube,” Villegas continued, highlighting SMOL (almost 20 million subs) and South Korea’s KIMPRO (almost 10 million).

Chasing the Korean wave:

Highlighting the global interest in Korean pop culture, The WIT Kids Garden selected the HBO Max Brazilian live-action series *My Magic Closet*. “It tries to capitalize on the craze for K-pop stars. It’s about a teenage girl who finds a magic portal in her closet to the dorm of the biggest K-pop group in the world.”

Live-action winners:

CBC Gem’s *Macy Murdoch* made The WIT’s selections. The tween spin-off of *Murdoch Mysteries* reflects an “interesting strategy for a broadcaster to work with their IP.” Villegas then highlighted another live-action series, this one from Australia: ABC ME’s *Turn up the Volume*, set at a music camp and featuring a diverse cast. Also making the cut is CBBC’s *A Kind of Spark*, focused on an autistic 11-year-old.

Creating a European Animation Hub: France's Success Story

Insights from:

Clément Calvet, President & Producer, Superprod

Julien Borde, President, Mediawan Kids & Family

Emmanuèle Pétry-Sirvin, Producer & Head, International, Dandelooo

Sophie “Kido” Prigent, Head, Sales, HARI

Watch it [here](#).

France’s positioning as a European animation hub has been long in the works and has involved the creation of a vibrant educational system, tax credits and a quota system to encourage domestic production:

HARI’s Prigent referenced the country’s robust animation training framework, tax credits, subsidies and content quotas as key benefits. Dandelooo’s Pétry-Sirvin mentioned the abundance of linear channels in France, while Superprod’s Calvet highlighted the stability of the local market. “We are very lucky to have a system of very strong commissioners,” Mediawan’s Borde added.

International partners “trust the French producers to be capable of delivering new, innovative, fresh ideas,” Borde added. “They also know that we are capable of resolving many very complex financing situations.”

Calvet added: “French animation can travel; more and more, you can see our content on the channels or platforms in every country in the world, including the U.S.”

Pétry-Sirvin highlighted how French animation has matured. “We’ve strongly improved, notably on the writing. And on the design, we’ve proven our diversity in styles. We have great designers. The talent has increased so much.”

Borde added that French producers are also now “not only seen as people who can finance, who can find the right talent, but also studios that can manage to build an IP. Many high-ranking shows in the U.S. originated in France.”

Across streaming and linear, commissioners have a broad range of needs:

Borde pointed to “broad demand” from broadcasters, ranging from young preschool to adult animation. “Traditional broadcasters are more open than ever. They can go to more serialized series to different demos. In the last months, we have seen the streamers moving to more commercial IPs.”

Commissioners are looking for “lovable characters who spark empathy, who are experiencing everyday situations that kids can relate to, but also emotional intelligence,” Prigent noted. “And a lot of comedy. With all that, if you can bring the family to watch the shows together, then you tick so many boxes.”

Pétry-Sirvin also pointed to the enduring demand for comedy but added, “They’re asking for more meaningful programs. Parents and

broadcasters don't want kids to just be eyeballs anymore and be entertained, but they want to have takeaways. Not in an educational or preachy way, but intertwined into the story to have things that are helping kids feel better about themselves.”

And in an on-demand era where discoverability is a conundrum, Pétry-Sirvin noted: “The kid has to click on something they recognize as a brand or something extremely striking. Your series is judged on a very small image. You cannot explain what it's about and how good it's going to be. You have to be extremely impactful on two centimeters.”

“Discoverability is critical for the streamers,” Borde added. “Netflix has been such a big believer in the algorithm mechanism pushing content and a function of your taste. The streamers have seen that is not enough and that if you want to build an IP, a franchise, you need to help discoverability. You need to curate your content and market it. We are starting to see the streamers [using] the traditional ways of establishing an IP.”

Funding models are in evolution, but the traditional co-pro model remains paramount:

Dandelooo is relying on the traditional co-pro model to manage financing productions, partnering with other entities within Europe and tapping into the regional subsidy program. It's the same at Mediawan, Borde said. “It's using the European toolbox that is here. We have real competition between the different tax credit systems in Europe to attract business. It's really something that is helping us cope with the different financing challenges we face.”

And as funding models evolve, so do windowing strategies:

“There is a better understanding that content needs to be everywhere,” Borde noted. “To build an IP in such a fragmented environment, you need to be where kids are. Our partners understand that. But still, in their DNA, they love exclusivity. They need exclusivity for their own business. We understand that. But it is moving to sharing more.”

“In theory, they all say they want to share,” noted Pétry-Sirvin. “But when you boil down to two trying to make a deal, it doesn’t work anymore. I’d love it to be easier, but exclusivity still seems to be king in many situations.”

Prigent added: “A lot of the platforms and broadcasters have been asking for known franchises and successful second runs. They’re aware they can’t necessarily get full exclusivity. Budgets have been a bit challenged recently. So we see more flexibility, but it’s true that as much as possible, they’d love to have that exclusivity, or at least they make compromises in one season or shortening the length of the holdbacks.”

Calvet noted the need for exclusivity is not coming from the streamers—linear channels are still hesitant to take on a show that is already available on-demand. “We need to convince both sides to live together.”

For Pétry-Sirvin, though, it’s the streamers that are least willing to share, especially when it comes to shows already airing on a linear broadcaster in a market. “They will not touch it if France has already taken it. It’s starting to slowly change a bit. They realize that if they don’t make an effort there, they will walk away from great projects.”

Animation Innovation: How Leading Studios are Driving New Techniques & Shortening Timelines

Insights from:

Raphaëlle Mathieu, COO, Cyber Group Studios

Matt Bishop, Producer & Founding Partner, Sinking Ship Entertainment

Ulli Stoef, CEO & Producer, Toon2Tango

Watch it [here](#).

The need to give creators new tools, the emergence of streaming platforms and a squeeze on budgets are driving studios to push their techniques:

“In our industry, we’re here to create, to innovate,” Mathieu said. “When new stories come up and you want to tell it the best way possible, you need to have the tools enabling you to do it.”

“Back in the day, we used to have feature animation and television animation and never the two shall meet,” Bishop said. “Right now, I think we’re kind of at the precipice; you’re starting to see things that look like feature animation, but it’s actually television. As things continue to advance, that gap is going to shorten and shorten, and the quality is going to increase. I like to view future technologies like newer paintbrushes, newer ways of painting, and every single time it just gets better and better. Now with the birth of

real-time, I think it's going to become a better eraser. It's going to allow people to be more flexible and faster, but actually just give them more creative options.”

“We are all pushed to create more innovation by the market itself,” Stoef added. “Quite some money has been taken away from the market. So at the moment, budgets are a little bit tighter. We have to be really innovative and cost-effective in order to produce great shows with the utmost creativity. That almost cries for innovation.”

Embracing real-time animation:

Sinking Ship is fairly new to animation, Bishop said, with the outfit having made a name for itself in kids' and tween live-action shows that were heavy on special effects, all handled in-house. “We were able to take a fresh approach to animation for our most recent television series and also for our first feature that's coming out this year. We looked at our VFX pipeline, which is a Maya Houdini-based setup, but we realized that as things were progressing, there was a massive move toward real-time. We decided to really double down with Epic and invested in building out an entire real-time pipeline for our first series, *Builder Brothers Dream Factory*. We still do our animation of Maya, but it was really important for us to come up with a way that we could actually adapt a lot of our live-action mentality into production. The nice thing with working in real-time is it's very similar to how we do location scouts. It takes a lot of the preproduction that you would have in live action and

moves it to the front, so the pipeline kind of flipped, which is exciting. We've also been making a massive move into universal scene description (USD). Our traditional pipeline couldn't handle the feature side of things, so we had to double down on USD. Long term, USD is going to absolutely revolutionize both collaboration and also give a competitive advantage for the studios that are running it because it's so much faster, it's so much more efficient. We can move between software incredibly quickly. We can go with the benefits and speed of an Unreal pipeline for television, and then using USD for robust rendering and high-quality fidelity."

Cyber Group has also been working with real-time animation, Mathieu said, calling it a "game-changer." Its use, which began with *Giganto Club*, a digital companion to the *Gigantosaurus* series, is "complementary" to the company's traditional animation pipeline. "It gives us more possibilities, more flexibility and more ability to speak in a language that is appropriate to the content or to the cost-effective need of creating content with budgets that are getting smaller. Or you need to create content that is digital-native. The financing for that type of content is not necessarily the same, and we have to be creative."

Beautiful animation is great—but kids are spending a lot of time on shows made at a fraction of the budget; so, now what?

Stoef noted: "The best possible animated picture does not automatically have the biggest fan base. It's a clear message that we have to

create very deep stories that relate to the kids and not to us. You see so many shows out there in the market that look stunning, but they are so distant from our core demographic. That is frustrating to me personally, especially when you see those shows that are partially financed by government funding subsidies, tax credits, tax breaks—they fill the pipeline to the platforms or to the broadcasters or whatever with these shows that will never succeed because they simply don't hit the heart of our core demographic.”

“It can be a bit frustrating from time to time to see a show that I would say visually is not so great having a great success,” Mathieu said. “But they got it right on so many other levels that maybe we can learn from it and we have to do better as well. I think we're at a moment in our industry where there are really two different ways to work that will coexist. The first one is the traditional one that takes a lot of time, and we will be able to reduce it at some point, but if you want to do great quality visually at the service of amazing stories, appealing to the hearts and the emotion of kids and grown-ups, it will take time. On the other side, you have the digital space where you can experience another language, another type of storytelling, and they can complement each other. We're newbies in the second area. It's good to be challenged.”

Bishop said he's excited that “broadcast is becoming democratized.” He continued: “It really boils down to story. If you're telling a good quality story and you're connecting with your audience, there's so much to learn from that. You can look past bad quality if

there's a good story, but you can't look past a bad story if the quality is good. It won't connect with the audience. It's exciting that these platforms exist because some of these shows would never see the light of day ten years ago because there would be no audience for it. And I think it's only going to continue to grow. I think we're going to see more and more of this content, and we're going to see what connects and what doesn't."

"We've got to get better in every discipline," said Stoef. "The so-called cheaper animations, which are having great success, should motivate us to find a formula that enables us to produce high-quality, stunning pictures, fantastic stories. Story has to come first because we can never repair that part."

Brand Building: From Toy Shelves to Roblox and Everywhere in Between

Insights from:

**Katrina Hitz-Tough, Senior VP, Franchise Strategy & Marketing,
9 Story Media Group**

Ken Faier, El Presidente & CEO, Epic Story Media

Rob Goodchild, Commercial Director, Aardman

Rob Bencal, Co-Founder, Cookbook Media

Watch it [here](#).

To build a brand, you have to be everywhere kids are:

“There are so many ways to reach kids,” Faier said. “When thinking about brand strategy, you have to think about where the audience is, where it is going to be, and develop your content strategy, engagement strategy accordingly.”

Hitz-Tough said it’s crucial to know where your audience is and “how they operate in all of those different spaces. What are they looking for? So many brands can say, I’m on social media, I’m in Roblox, but the experience they have is marketing. It is not an experience that’s true to the DNA of how kids play or the DNA of the IP. You start with: What is the core intrinsic DNA of the content? What is it about? Why will kids care about it? Why are they going to be passionate about it? How are they going to want to take it into their life and make it their own? How are you going to provide that?”

Bencal added: “It’s never been easier to reach a consumer, but it’s also never been harder because it is so distributed out there. Also, it’s expensive for brands to reach all those different platforms. It’s almost like mining for gold. You’re hitting a couple of these different platforms to see which one strikes. It’s time-consuming. And it requires spending upfront.”

Goodchild added that where your brand is in its life cycle must inform your strategy. “It really is about making decisions about where it is just for a touchpoint because you feel you need to be there and where you really want to invest your time and energy to make it the most compelling and the deepest experience it can possibly be.”

And you need to be thinking about your potential brand extensions at the outset, not once your show has already launched:

“The more you can think about how you build that world and how it will iterate across other platforms, the more it stays true to the DNA,” Goodchild said. “Now that’s very different from saying, when should I launch or when should I go to market? You can go too early and mess yourself up for five years.”

Faier agreed, noting that Epic Story was founded with the intention of building franchises, with creators at the heart of the conversations. “Some creators don’t want to have the toy partner in the room

or the gaming partner in the room. It's about educating the whole chain of creativity throughout the IP development."

Bencal added, "The economic realities of where we are as an industry and as a business, you have to think about it from day one. Just making the financials work off of content alone is a very tough thing in the day of platforms and building a brand through digital. Creators really have to think about it from the start."

"To grow [a concept] into a brand, we need to know what other stories we can tell," Hitz-Tough added. "What other experiences can we tell? How can we take this story and expand it? Yes, we want to know that there's room and growth and evolution for a second series for television. How do we make sure that we have enough that is at the core of the story, but we have something new to tell? If you're a true fan and you go to see an experience and it just feels like a repetition of the TV show, that's boring. There is a whole core component of thinking about expansion; how you are going to keep it fresh and interesting? And when you're handing a property to kids, they are going to want to make it their own. [Creators need a] level of understanding and comfort of what that might look like and acceptance of that."

Faier noted that's crucial to ask creators: "What's the meaning of this property to the audience and what is the relatability? Everything's been done. So on the one hand, we want it to be unique. But if you go to Walmart, if it's too unique, they're like, I don't get it. So

what is the meaning to the audience, and why do you think this is going to resonate? What does success look like to you? ‘I just want to get it made,’ is not enough. We all want to get properties off the ground. But what does true success look like? And what role do you want to play in all of that? The challenge we all have is kids’ attention spans are so short now. I love the show. Is there a game to play? Are there toys? And books to read? If there are not, they’re going to move on to another property pretty quickly. And even if you have all that, the life cycle of your super fan hopefully is lifelong, but often it might only be a couple of months. That’s very hard to plan around.”

Bencal agreed that since people are “burning through content” you need to have a lot of elements in place to keep consumers engaged. “If there’s not enough there, they can disappear or they just don’t come back because there’s just so much being thrown at them. The one good thing we have is, the preschool audience doesn’t mind rewatching that content over and over and over again. When you get into the older kid, 10-plus, which is always an elusive audience, it’s more challenging.”

Between inflation, a cost-of-living crisis and lingering supply chain issues, there are challenges in the L&M sector, but IP owners should have reason for optimism:

“When I was in the toy business with Mattel for a number of years, we always said Christmas always comes,” Bencal said. “It was

always a silver lining for us. But the reality is that it just might be smaller. Some of the retailers that in the past would support kids' properties in a big way are no longer with us. Some of them are in different iterations with a smaller footprint. Some of the major ones have a low tolerance for unproven properties to give them a chance in this kind of environment because they just can't risk something sitting on the shelf, whether it's physically or in the e-commerce space. It gets a lot tighter for opportunities out there unless you have some of these IPs and proven success in the retail world. Buyers have always been tough out there in retail. But now with consolidated space and consolidated footprint, it's even more challenging."

Faier added: "There are some things going on this year with an over purchase of inventory last year tied to Covid and supply chain issues, so that's working its way through the system. It's still a big number. So if it's down 1 or 2 percent, let's say, or even 10 percent; it was projected to be down a lot more pre-Covid and it was up 20 percent. I do think there's pent-up demand for travel that's taking some of that discretionary spending. So, yes, inflation has an impact in terms of the cost of products coming out. But if you have a child who's a big fan of something, parents are going to continue to purchase it. Retail is more challenging, but 50 percent of toys are sold by e-commerce. There is still the possibility to go direct to consumer. So you can test there, or right-size your investment."

In this climate, Hitz-Tough noted that IP owners can consider how to "deliver a brand experience at a price that enables everybody to

participate. You've seen the growth of the dollar stores and all the discount channels. Obviously, those price points are lower. So how do you make sure you create a product that is worthy of your brand, that provides real play value for a child or an activity that's worth doing at a price point that's truly accessible? Kids are still having birthday parties. They're still having experiences with the brand as they travel. That in itself is an opportunity. How do you be the brand that fulfills those needs at a price point that is easy for a parent to say yes to?"

Studio Evolution: From Work-for-Hire to Original IP

Insights from:

Heath Kenny, Chief Content Officer, Mercury Filmworks
Chantal Ling, VP, Original Series & Co-Productions, Mercury Filmworks

Watch it [here](#).

Led by Clint Eland as CEO, Mercury Filmworks was established in 1997. The company is well-known for its 2D capabilities and was an early player in embracing Toon Boom Harmony and other digital animation technologies. After working on several co-pro projects, the company has embarked on an originals drive.

Being in the work-for-hire business means emphasizing the word “service”:

“We’re really seeking to be of service at the highest level, but also seeking to understand from the onboarding process of any new show what the needs are of our clients and our creative leaders,” Kenny said. “Whoever the creative stakeholders are, the first thing we do is try to actively listen.”

Ling added: “We realized we needed to be the guardians of the creative. It’s in our DNA from the service, and it’s fed into our originals team as well.”

Expanding into original content requires a well-thought-through strategy:

The process begins with identifying the “pillars or the promise of a show,” Kenny explained. “Chantal and I go through a sort of thought exercise of figuring out, based on what we believe to be the strategy or the promise of the show, what are the stories we’re telling ourselves that need to be true for this to be a reality? Once we list those in terms of importance, we know exactly what we cannot compromise on for this to be a success. It’s an empowering place to be because you can be a collaborative partner, but you’re not compromising unintentionally.”

Supporting the creative vision is crucial, Ling added. “The processes that Heath brought into the company have elevated us even further and enabled us to focus on each project uniquely and servicing that project and that creative team.”

Kenny added, “We have a very deep and robust pipeline, but it’s thanks to our people that it’s able to be flexible and agile at the same time. We can do something that feels slapstick, cartoony and almost hand-drawn, and then we do something else that is subtle in its performance and very complex. We can flex and move our pipeline to suit the creative. We’re always thinking about how we can make sure that the technology and our people serve the creative.”

Ling noted that ensuring the slate is diverse and authentic is vital. “We work extremely hard in our projects to ensure that we’re casting appropriately and have a diverse voice as far as the types of stories we’re telling.”

That’s easier said than done, Kenny added. “Sometimes projects get delayed heavily because we haven’t found the right people. We

have to wait. We have to keep looking. That's a passion of ours. When you have the right level of diversity of voices in and around the show's core team, its potential reach internationally [expands]. It makes a real difference in terms of audience engagement. It's become a pillar of the way we approach original content."

The Mercury Filmworks process is creator-led:

"One of the mantras that we use a lot is this idea of creating a safe place to be creative and a creative place to do business," Kenny noted. "A lot of people just focus on the projects, but if you don't create the process for your people, there's nothing for them to follow. Also, if you ask your people to go from doing one thing that they've been doing in terms of expertise incredibly well, and now you're going to jump into the fear of the blank page, it's terrifying. So you have to get them ready. It's people, process and projects. You can't do it any other way. Part of how we make a safe place to be creative is to openly manage risk. We need to manage the expectations of our creators. As we move into more strategic partnerships, it's the same thing. We need to understand how we're managing our risk as partners."

There's an art and science to crafting a development slate:

"We need to make evidence-based decisions on how we move projects forward," Kenny said. "We need proof of real engagement, and we'll take the project to the next phase. That means we can make bold and confident moves in terms of the sales tools we're creating to pitch things. Ultimately, it's bringing clarity, transparency and safety. We want to ensure that our creators feel safe and confident because nothing is worse than a creator that lacks confidence."

The development process ends in the preproduction phase, Kenny continued. “That’s where all the theories and the stories you’re telling yourself about finance become either a reality or you end up with a gap. At that point, you must decide how to pull the trigger on a green light.”

Kenny then outlined the “workshop process” the company deploys to onboard projects. “One of the biggest challenges for anyone working on originals or creating content from scratch is alignment. If you lack alignment, you can waste precious money and time and people being misaligned and ending up in different places than you expected. That’s the worst outcome.”

Mercury’s workshop process “allows us to identify any property’s core themes and promise. From that, we can create a business and a creative strategy, and we can cast a team that is set up for success. We want to make sure that everyone’s on the same page. And then we’re building sales tools that will deliver on the core promise of a show.”

AI could be a game-changer:

“The industry has been driven by the commercial half-hour for the longest time. And then, we shifted from that advertising-driven model to subscriber-driven. That’s a different interaction with content and a different way of consuming content. The next logical thing that AI will empower us to do is create user-driven formats. The next frontier for us as content creators is to find a way to elevate that user experience through AI and to create content that has multi-use cases,” Kenny said.

Kenny expects AI will also be used in production management. “OpenGPT is interesting in the way it’s creating production management tools. If you give it a timeline and budget, and it can spit out a working plan for you, that’s valuable.”

Building an Animated Hit: *Builder Brothers Dream Factory*

Insights from:

Drew & Jonathan Scott, Creators, *Builder Brothers Dream Factory*

Watch it [here](#).

The twin brothers are the co-founders of Scott Brothers Global, which is working with Sinking Ship Entertainment on *Builder Brothers Dream Factory*, inspired by their own children's books. The twins have been making their hit show *Property Brothers* since 2011.

There are lots of kids who know exactly who the Scott brothers are:

“There are so many people who started watching our show as kids, teenagers, and now they're grown-ups and they're actually buying a house and they're settling down,” Jonathan said. “Even today, we'll have 5-year-olds that stop us at the mall—it's the Property Brothers! We thought, how cool would it be if we could inspire a whole new generation of kids? I know our kids are very tactile. They love anything that they can get their hands on to build.” The animated series, he noted, “felt like a natural progression.”

The timelines between a factual series and an animated one are vastly different, and take some getting used to:

“When we did our book series originally, that was sort of our first dip in the pool just to see what the process would be like,” Jonathan said. “We then took all of the feedback that we had, listened to the audience and what the audiences were looking for. People know our shows for technology, that 3D technology where you see things flying in and out. We decided to bring a whole new type of 3D technology to the animation, which you usually would only see in feature films, not in regular animated series. It took a good two and a half years to finally see it come to fruition. But it was worth it because it’s unlike anything people have ever seen in the TV space.”

There is plenty of edutainment built into the series:

Making the show fun was crucial, Jonathan said, while “also bringing in that positive messaging. We worked with several child psychologists to make sure that we’re getting the right approach to some of these real problems that kids have and being relatable and enjoyable for them. We were like the go-to kids in the neighborhood; whenever any of the other kids would have a problem, they would come to us and we would figure out a solution. We literally went and built a doghouse for one neighbor. We took that with a little creative embellishment and worked it into the series.”

And making it in CGI was a crucial element in bringing their vision to life:

“We worked with incredible partners to figure out a way to do it so that we can bring that top-tier quality for the animation, but get enough content that we’re going to do it as a regular series,” Jonathan said. “We found that secret recipe and we pulled it off. It also helps take you out of this animation realm and make it even more believable. Kids want to believe that anything they put their minds to, they can accomplish. We actually did this. We had big imaginations and we had even bigger determination to get it done.”

“Innovation is always important to us, with everything we do,” Drew added. “We’re one of the larger lifestyle, unscripted producers in North America. This is an original 3D preschool series. To be able to have 40 episodes launching with this full 3D feel is pretty amazing.”

Resurrecting Classic Brands

Insights from:

Delphine Dumont, Chief Commercial Officer, Banijay Kids & Family

Katharina Pietzsch, Former Director, Junior, ZDF Studios

Luana Perrero, Head, Content Sales, Mondo TV Group

Watch it [here](#).

Known IP is high up on commissioners' and buyers' wish lists:

Dumont has noticed an increased interest in known IP from both broadcast and streaming partners. “It’s been a resounding demand in the last couple of years,” she said. “We’ve been doing a deep dive of our catalog of IPs. The element that has been very important for us to work with is the digital factor. We are very lucky to be quite strong in this area. We’ve got more than 70 YouTube channels for our own IPs. When we look at developing an old IP into a new IP, those metrics have been very important for us to consider.”

To reboot or not to reboot? A track record of success is key, as is the ability to keep the show’s DNA while modernizing it for contemporary audiences:

Pietzsch said: “Content-wise, we always look at what’s at the heart of the IP. What do we love most about it? What is it known for? And then can it still be relevant for kids today and how can it be made that way?”

Striking a balance between the charm of the original IP while also making it contemporary and relevant for current audiences is “the tricky bit—that’s what everybody is trying to get right,” Pietzsch noted. “You want to take what’s most appealing about the brand and what everybody loves about it or loved about it and then bring it into today.”

“We do a lot of research and insights about who is the target [audience] to make sure that we’ve got all the values and what they really care for and that we make sure that we can incorporate that in some ways into our show as well, without losing the original DNA,” Dumont said. “You want to get the older generation on board as well.”

Co-viewing is important for heritage brands, given their ability to attract multiple generations:

“The fact that it’s a classic kids’ IP will transcend generational and country divides,” Dumont said. “That’s not always easy, because a show is not always a global success. It’s all about layers—in the script, in the appeal of the brand. We need to make sure that we don’t alienate our fandom. When we look at our social media and our digital footprint, it’s a lot of adults and those adults hopefully will have children and those children are the new core targets for these new products.”

Pietzsch added: “It’s really important to keep the original DNA, so parents can recognize the original. They will still see what they

loved about it. Sometimes it's really fun to work with subtle references, inside jokes, visual references, character names, voices, iconic lines. Parents really go for that. We get a lot of feedback from properties where the new version is different look-wise from the original. And that's a tricky part because a lot of people don't like that. Keeping visually and tonally something from the original keeps the DNA alive."

Tapping into social media is important when relaunching classic brands:

"It's a tool for preparing the launch as part of our branding strategy," Dumont said. "We also aim to keep when we negotiate with commissioning partners as much as possible some exclusivity on certain rights for digital exploitation. Sometimes it's a bit of a fight with the commissioners, but I'm convinced that having your content available, it doesn't have to be the full-form content that you have on digital, but having, you know, a snippet to be able to play with that brand, it benefits everybody. People pay money for exclusivity, but if you want your brand to exist and thrive, you need that non-exclusivity. As an IP owner, it's a benefit to us to keep our brand alive."

Pietzsch agreed, adding: "You can really start creating or building momentum before the launch, once you start creating the new reboot, and then just keep feeding social media, even if it's only snippets. It just creates such buzz even before you launch. And that's really helping on a lot of our brands."

From Book to Screen: Animating a Beloved Picture Book

Insights from:

Brian K. Roberts, Executive Producer, *Not Quite Narwhal*

Watch it [here](#).

Adapted from the Jessie Sima picture book, DreamWorks Animation's *Not Quite Narwhal* is streaming on Netflix, telling the story of Kelp, who was living his life as a narwhal until he discovered he's also a unicorn.

Keys to staying true to the original story:

The picture book served as the team's "North Star" throughout development, Roberts said. "Whenever we were doing anything, thinking about stories, about characters, we were always pointing back to it as our inspiration, and also something to live up to. We all wanted to do Jessie's story justice and really honor it with the series itself, even though the series is a different thing. One of the main big ways that it's different is that there are no other named characters in the story at all. If you're telling 26 half-hours, actually 52×11-minute episodes, you need other characters. So we had to build out that world and look at what made Kelp special, but then also fill the world with other special and unique characters, both underwater and in unicorn land above water."

The “big storytelling hook,” Roberts noted, “is that because Kelp is narwhal and unicorn and has lived underwater and now is learning about unicorn land, they have a unique perspective on anything. Kelp is the only one who has been in both worlds and being in both worlds and having those experiences in both worlds leads Kelp to have a unique way of solving problems. That helped inform our storytelling. A lot of series have a didactic, binary, if you do this, you can’t do that. How could Kelp, with their unique perspective, figure out how to put the two things together to make something new? That really gave us a unique way of telling stories. And that was all driven by Kelp and what made him unique.”

True diversity and representation can be a challenge to execute, but it’s well worth the effort:

“Representation and diversity was something we talked a lot about. Whenever you are talking about these things, it really requires an atmosphere of openness and generosity. We all come at these conversations with our own backgrounds, our own biases, and our own expectations of the right way and wrong way to say things and do things. It leads to a lot of interesting, sometimes even awkward conversations because you’re talking about things like ethnic and racial coding in fantasy characters. You’re talking about how does a Black unicorn need to look when you’ve got this multicolored rainbow of unicorns that could be any color? What makes them Black? Is it the voice? Is it the hair? Is it the

eye color? We also have a unicorn who has a prosthetic limb. And I'm pretty sure that's the first unicorn character in mainstream media that's ever had a prosthetic appendage. That creates a whole lot of interesting conversations as well. One really important thing throughout that process has been using consultants who we bring in to help hash out some of those ideas.”

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