Manasha Daswani hears from several leading distributors about the latest trends in the thriving drama business.

We are still in a new golden age of drama, but the bigger story for many executives involved in the scripted business is that we are deep into the era of niche, fragmented viewing. Live sports may still be able to command mass viewership, but for drama series, the chances of having a big, broad-audience global hit are starting to wane.

“Market segmentation is picking up speed, primarily driven by the streaming platforms,” observes Robert Franke, the VP of drama at ZDF Enterprises. “Even smaller shows tend to find an audience now. That is great, but also kind of scary. People in our industry are used to selling their flagshipships to hundreds of territories. Now you have all these smaller shows popping up like mushrooms. People call it the golden age of television. In my mind, it’s the golden age of fragmentation.”

The upside for many is that pretty much any concept is on the table. “We are only limited by the ideas that we come up with,” says Paul Bucciari, the president of A+E Studios and A+E Networks Portfolio Group. “In today’s marketplace, the opportunity is immense, pipelines need to be fueled with excellent content, and we intend to accommodate.”

Indeed, A+E Studios is not just producing for its sister Lifetime and HISTORY businesses. “Our first priority is to super-serve our brands,” Bucciari says. “But we have taken a very methodical approach and over the last 14 months have sold quite a big number of shows with top-tier talent outside of our networks.”

TALENT FIRST

But it’s not enough to just have a good idea. The key, Bucciari notes, is being associated with high-caliber talent. “More than a strategy, it’s a philosophy,” he says. “You want to have ease of transaction; you want to have a place where the creatives feel empowered and supported. That’s starting to shine through here. We have projects with Jenji Kohan—right before she went into her Netflix deal—Greg Berlanti, Robert Zemeckis, Jon Favreau. If they have a good experience, that then translates throughout the community, and we are able to attract more talent. That’s our approach. Having been on the producing side, I know how much I wanted a studio, a support system, to back me. We’re trying to do that for producers who are coming to us.”

At FremantleMedia, Christian Vesper, executive VP and creative director of global drama, observes, “A good idea with a good writer attached always stands a good chance” of succeeding. But being affiliated with prominent names or known IP always helps. The current FremantleMedia drama slate includes My Brilliant Friend, based on the first in the Elena Ferrante Neapolitan Novels four-part book series, which is being produced by Wildside in Italy for Rai and HBO; the book-and-film-based Picnic at Hanging Rock for Foxtel in Australia; and The Miracle. The latter, for Sky Italia, is based on an original story and written by and partly directed by Niccolò Ammaniti, one of the most important literary fiction writers in Italy right now,” Vesper notes. The company also recently announced that it is working with filmmaker Michael Haneke. “He is one of the great auteurs,” Vesper says. “We continue to work with Paolo Sorrentino, and we’re about to launch a few more projects with other filmmakers who have won Palme d’Ors.”

For Leona Connell, the director of sales at Sky Vision, “it’s all about having a great series that has some unique selling points and great marketability. Everyone out there is looking for strong narratives, great scripts and great talent that will help broadcasters and platforms market the shows and help them build their own brands.”

Françoise Guyonnet, executive managing director of TV series at STUDIOCANAL, expresses a similar perspective when she says, “First of all, a drama must have a truly engaging narrative and a storyline that resonates with viewers wherever they are. Secondly, audiences are now so used to seeing the highest production values and talent on their screens, we just cannot let standards slip.”

CRIME PAYS

With its goal of delivering distinctive, innovative content, STUDIOCANAL arrives at MIPTV with Crime Time, a thriller produced for the STUDIO- international mobile app. In its original format, the show spanned three seasons of 10-minute episodes. The series is now available in a re-edited version of 4×1-hour, which STUDIOCANAL is distributing in Europe. This crossover between digital and traditional sounds very interesting to us,” Guyonnet says.

The crime and thriller genre remains a lucrative one, with STUDIOCANAL also showcasing NOX, a Canal+ original, starring acclaimed French actress Nathalie Baye. However, Guyonnet adds, “One of the recent global trends that we have seen is the exploration of the family unit in different ways through dramatic and innovative narratives. Complex family relationships are particularly of interest at the moment and we are delighted to have two brand-new drama series, Come Home and Ride Upon the Storm seasons one and two, that reflect this important trend.”

ZDFE drama’s Franke reports that amid audience fragmentation, “It’s important to become more diverse in the titles we’re adding to our catalog. There are smaller shows with great premises for niche audiences and you have to find these viewers out there. It’s harder and harder to generate these worldwide hits. People are more selective and they are watching things that cater to their needs. In that regard, we are diversifying our portfolio. We have been very strong in the past in crime and romance, but now we see there’s a growing
A Canal+ Creation Originale, NOX is a new six-part crime thriller—set in Paris and starring Nathalie Baye—that is being co-distributed by STUDiocanal and Gaumont.

Demand for elevated genre ideas, things blending into each other, and there's even more flexibility in what channels want. We will continue to have our very strong Scandinavian production lineup, but we will also look into smaller topics now. We're broadening our corridor of what we take in."

SOMETHING FOR EVERYONE
Sky Vision has also been broadening its slate.
In addition to Sky-commissioned series in its portfolio—such as the buddy cop dramedy Bulletproof; Save Me, starring Lennie James; the Benedict Cumberbatch-led Showtime copro Patrick Melrose; and the best-selling-book-based A Discovery of Witches—the outfit is showcasing its first Australian series, Goalpost Pictures' military-themed Fighting Season for Foxtel. The company is also representing some non-English-language shows, among them Movistar's The Plague and Sky Deutschland's Acht Tage.

FremantleMedia's Vesper cautions against just being reactive to apparent gaps in the market. "The minute you start saying what everyone is looking for, it changes," Vesper quips. "The SVODs want projects to come to them set up already with talent. With those projects, IP helps, or a well-known writer or director who people trust. And if you happen to have a big piece of casting talent, all the better. That makes it easier to set up. But the challenge we have as distributors and producers is how to push the conversation toward new ideas. Those are the things that seem to pop, ultimately. Look at something like Stranger Things, which came out of left field. It was unique. That's what people want. It's always the conversation on this side of the business: what is going to work and where are the edges of what is new and interesting?"

A+E's Buccieri says that it comes down to giving "great writers and producers the freedom to tell the stories they want to tell," as the company has done with recent successes like Knightfall, SIX and UnREAL. "There are so many opportunities out there. With our ambition to grow, we want to get even more scale than our platforms allow us to have. We've been quietly amassing a nice portfolio. We source projects too. We'll say we want to go into a specific genre or area. We'll say we want to go after certain book rights. And then we attach a writer. Or we go after a story or article we

Benedict Cumberbatch stars in Sky Vision's Patrick Melrose, which is set to air on Sky Atlantic and Showtime.
found about an interesting, unique world, and then we'll source talent and writers to see if it fits with their passion."

Buccieri is also excited about the prospects of collaborating with platforms outside of the U.S. "I think there are wonderful, talented storytellers from all over the world and I want to be in business with them. Look at what we've done with Knightfall—that whole show is scripted out of the U.K., with U.K. talent. But to be clear, while the U.K. is a wonderful territory for great talent, there are so many other places that are exciting to work with. The Netherlands, Germany, France. We're trying to mine great stories from all over the world."

NEW SOURCES
As is ZDFE.drama, Franke reports, with the company expanding outside of its traditional strengths in German and Scandinavian scripted series. "We've added a lot of Belgian shows. The whole ecosystem in Belgium resembles Scandinavia. It's a small territory, so they have to co-produce. There is more openness to creating something that doesn't only do well on the big turf. Also, there are more internationally marketable programs coming out of the big territories. Germany is a good example—Ku'damm now has a chance to travel the world. That is not always true for our bread-and-butter business like these early evening German shows, which we sell very successfully to a handful of territories but we have a hard time selling to the U.S. Ku'damm can travel everywhere because of the narrative quality and the production values. Italian content had a reputation for being slow-paced and not very sexy. We have Maltese, which is super successful. It represents a new generation of film and TV makers driven to produce exciting new stuff."

CROSSING BORDERS
Next up for ZDFE.drama is exploring opportunities in the U.S. "We teamed up with a couple of handpicked U.S. producers," Franke says. "The first show out of development is One Bad Apple with Gavin and Rebecca Scott. Paul Johnson from Tuvalu is producing it for us. It's unique for us because we haven't done anything like this in the past. There are two more shows in the pipeline with U.S. producers. Like everybody else, we're investing at an earlier stage, taking more risks, and becoming more involved in the creative side to make sure we get something that we can really sell. We also co-produce and we help finance."

Distributors are also spending more time crafting windowing strategies on their shows in order to fully exploit them globally. "Our broadcast and OTT partners are putting a lot of marketing resources behind these drama series to help build their platform or brand out," says Sky Vision's Connell. "As a result, distributors are left wondering if we'll be in a position to sell the shows we've invested in beyond the first window because they've been strongly marketed as belonging to a certain channel or platform in a territory. But it's clear to us that great content can sell. On lots of our dramas, we're just on the first window. But on

Riviera, for example, which launched last summer—so it's still very young in its life cycle—we're already moving onto second windows. In America, we did a deal with Ovation after Sundance Now, so that's two windows already. In Africa, we were able to do a first window on SVOD with iflix, followed by a second window with BBC First. If it's the right content—great writing, great production values, fantastic talent on and off screen—there are opportunities for further windows. We as distributors work very hard to optimize those windows. We have to put a lot of thought into the strategy of each program to ensure that we leave as many opportunities as possible to then optimize those windows when the time comes."

ZDFE.drama's Franke notes that there is no one-size-fits-all approach to selling drama today. "We determine who are the most likely candidates to greenlight a project, and we try to get feedback as early as possible. And then we work out a strategy together with them. If you go to a large SVOD platform and they turn something into an original show, there isn't much windowing you can do. You have to ask yourself, is it the right thing to do for the show? It might be, and sometimes you have to say no, this is not what I want, we are aiming for a different type of exposure and we'd rather sell it off one by one. It's always weighing the strategic value of a deal versus the commercial value. We talk to our producers and ask them, what are you expecting from us, besides the money? That might be exposure or festival success or whatever, and then we craft a windowing strategy that reflects that."