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APRIL 2019 | YEAR 28 | # 354

Kids Special Edition + Focus in Spain

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IBERO-AMERICAN ANIMATION QUIRINO AWARDS • KINGSTOON • CARTOONS ON THE BAY



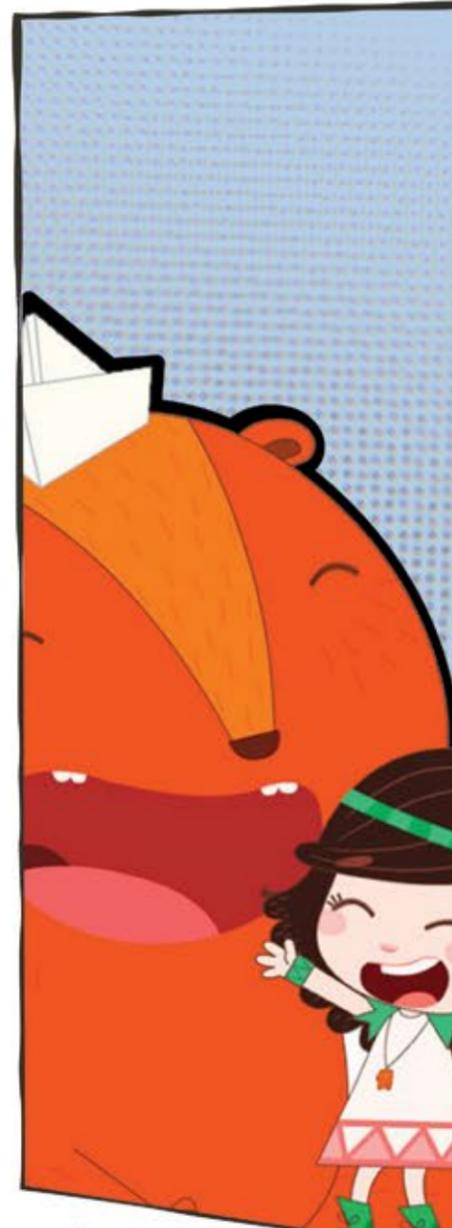
La Casa Animada - Cleo



b-water - Crayons



Ánima - Cleo y Cuquín



Tomavision - Emmy & Gooroo



Mondo TV - Invention Story



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The year of animation at Prensario International



mipjunior.

kidscreen SUMMIT

2019 will be a key year in several aspects for the global audiovisual industry, and it will also be a special one for **Prensario International**. Apart from adding more events and coverages, we will be putting strong emphasis on the animation and the kids content industry, and developing more special supplements exclusive for these genres.

Earlier this year, we attended Kidscreen in Miami, USA, for the first time, where we deliver a special double-edition first distributed at NATPE Miami. This month we are covering three events: happening in the same week, the second edition of the "Ibero-American Animation Quirino Awards" in Tenerife (Spain), and third edition "KingstOOn Animation Festival" in Kingston (Jamaica); and after MIPTV, "Cartoon on the Bay" in Turin (Italy).

This April edition starts distribution at "Premios Quirino", and that's why the Country in focus is Spain, the fifth worldwide and second European animation producer. It is a key global player that shows its strength at this special supplement through its producers, TV channels and public and private organisms.

Spanish animation industry and visual effects generated €654 million in 2017 and employed 7,450 professionals directly. It only represents 4% of the number of companies in the Spanish audiovisual sector, but it generates 20% of employment and 9% of the total turnover of that sector. Along with the Spanish key players, we are also highlighting top global brands and producers through key editorial pieces, interviews and in-deep reports.

In Jamaica, Prensario supports the third edition of this event focused in promoting the country's capital city as an animation production hub. Promoted by the Prime Minister Office and financed by the World Bank, KingstOOn is one important part of the **Youth Employment in Digital and Animation Industries (Yedai)** project that will execute USD 20 millions until 2020. The Caribbean island is offering strategic advantages, including financing programs and funds for global producers to develop their animated (and other genres) projects.

The animation has become one of the most complex audiovisual industries, as it branches in more business segments such as licensing, merchandising (toys, back to school products), music, live shows, among others, allowing IPs creators to keep building up the brand. Welcome to the new atmosphere.

FABRICIO FERRARA
INTERNATIONAL BUSINESS DIRECTOR



Prensario International

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SPANISH ANIMATION
MORE INTERNATIONAL
THAN EVER
TAX REBATES 20% TO 40%





Animation from Spain: strengthening the Spanish industry

Animation from Spain is the umbrella band created and supported by ICEX, Spain Trade and Investment, to promote the Spanish animation industry at all the international shows around the globe, as well as attract foreign investment to Spain.

From Animation we participate in three major events a year in an active way: **Kidscreen** (Miami), **MIFA** (Annecy) and **MIPJr** (Cannes), but there are also occasions when we can collaborate with a particular event because we see an opportunity, as is the case of the **Premios Quirino** (Canarias), where we support the co-production



market by inviting international buyers and distributors', describes **Silvia Barraclough**, ICT and Digital Content Department.

'This is an umbrella that allows to encompass any company, without the need to register, providing information and answering for requests related to any region through any of our 98 offices established all over the world. Then, we provide support from a formation perspective with talks and classes actual topics like new agents and business models, and a Media plan where we negotiate rates and we seek to promote companies. What we are trying to do is to support the sector in the most extensive way possible, and give all companies equal possibilities', she adds.

Regarding the Spanish animation industry, Barraclough remarks that there were some years where the growth stopped by a general social and economical situation, but now 'tons of new interesting projects are merging again'. 'Interesting steps are being taken and both internationally consolidated and new companies are emerging, and even companies that at some point had left their international presence are returning refreshed'.

With 250 companies, producers and distributors focused on the animation industry in Spain, has seen a revival in recent years of the local market. According to Barraclough, this is due to,

Silvia Barraclough, ICT and Digital Content Department

SPANISH ANIMATION IN FIGURES	
NUMBER OF COMPANIES, PRODUCERS AND DISTRIBUTORS	250
EMPLOYMENT	8,270 persons (direct employment) + 21,000 persons (indirect)
NEW PRODUCTIONS PER YEAR	Average of 13 new series, 24 short films and 6 feature films per year
PRODUCTION ANIMATION FEATURES FILMS	90+ expected new productions in the next 4 years
PRODUCTION ANIMATION SHORT FILMS	400+ expected new productions in the next 4 years
PRODUCTION ANIMATED TV SERIES	140+ expected new productions in the next 4 years
NUMBER OF CO-PRODUCTIONS	over 90 %
NUMBER OF INTERNATIONAL CO-PRODUCTIONS	over 70%
MAIN CO-PRODUCER / TV CHANNEL	TVE and Televisió de Catalunya
MAIN CO-PRODUCER/ REGION	European Union and Spanish Speaking
TURNOVER / YEAR	818 M € (24% expected growth rate)
% OF PRODUCTION EXPORTED	90 %
CO-PRODUCTION TREATIES	More than 30 countries

on the one hand, that the market itself responds to cycles, but on the other to the appearance of new agents and the search for new contents that are opening possibilities. 'At the beginning, the companies were not very clear about how to take advantage of the new possibilities offered by the market, which in turn posed times and availability that people were not used to. But now, they understand that not only paid services could offer new opportunities, but also FVOD players that turns into marketing tools 100% monetizable', describes Silvia.

And she completes: 'The support of entities like ours provide the industry not only concrete help through actions in an industry that takes its time as is that of animation; It also allows our companies to have visibility. Our main aim now is to increase the number exporting on regular basis, as diversify the export markets for Spanish product services'.



Diboos congratulates the Spanish finalists of the Ibero-American Animation Quirino Awards



Ibero-American Animation Quirino Awards

Premios Quirino de la Animación Iberoamericana



- La noria*
Carlos Baena
Nightwheel Pictures
- Starting from Zero*
Carlos Salgado
User T38, DDB
- Mum's the Word*
Khris Cembe
UniKo
- Bring You Home*
Marc & Xavi Terris
Alike Studio
- Patchwork*
María Manero
Universidad Politécnica de Valencia
- Mibots Playroom*
Nathalie Martinez
Wise Blue Studios
- The Amazing Story of the Man That Could Fly and Didn't Know How*
Manuel Rubio
Hiru Animation, Afterlife
- Black is Beltza*
Fermín Muguruza
Black is Beltza A.I.E., Talka Records, Set Mágic Audiovisual
- Buñuel in the Labyrinth of the Turtles*
Salvador Simó
Sygnatia Films, The Glow, Hampa Animation Studio, Telemadrid, TV Aragón
- Another Day of Life*
Raúl de la Fuente
Kanaki Films
- Lorenzo Live 2018 Intro*
Silly Walks Studio
Silly Walks Studio

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ICAA: reinforcing the support to Animation

The Institute of Cinematography and Audiovisual Arts (ICAA) of Spain is an autonomous body overseen by the Ministry of Education, Culture and Sports, which plans support policies for the film industry and audiovisual production in Spain.

Some of its key objectives are to help develop creation, increase production and favour the distribution of Spanish productions; to reach an acceptable share of the domestic market in order to maintain the whole of the Spanish film industry; to improve skill levels in companies and encourage the use of new technologies.

It also strengthens the standing of Spanish film and audio-visual arts outside the country; safeguards and promotes Spanish film heritage; and encourages cultural communication among the Autonomous Communities in the area of film and audio-visual arts.

Since July 2018, **Beatriz Navas** is the new general director of the Institute of Cinematography and Audiovisual Arts (ICAA). PRENSARIO interviews her for this Special **Ibero-American Animation Quirino Awards**, taking place in Santa Cruz



Beatriz Navas, general director of the ICAA

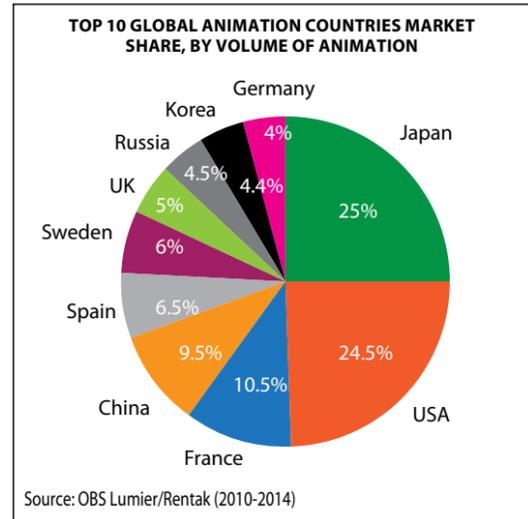
de Tenerife for the second year.

About the shows that is gathering key executives and companies from the region, she explains: 'The existence of this type of contests is fundamental to give visibility and value to the works. In the case of the Quirino, it is doubly important given that we talk about animation works, quality works with great potential for dissemination and cultural reach'.

For the Institute, and following **Valdés** words 'it is essential' to support the promotion of these works. 'Quirino also guarantees the projection of Spanish animation in the Ibero-American environment, covering a basic objective, which makes it a special and necessary event', she adds.

According to data from the **European Audiovisual Observatory**, Spain occupies the fifth position in the global animation sector, and the second in Europe, only behind France. 'The support vehicles of the ICAA are in the production of both, movies and projects that we would like to boost this year with positive changes to the order of aid bases: more points for animation and a minimum budget reserve', she remarks. We would like to have a specific plan for the animation that we will have to develop with a working group throughout 2019'.

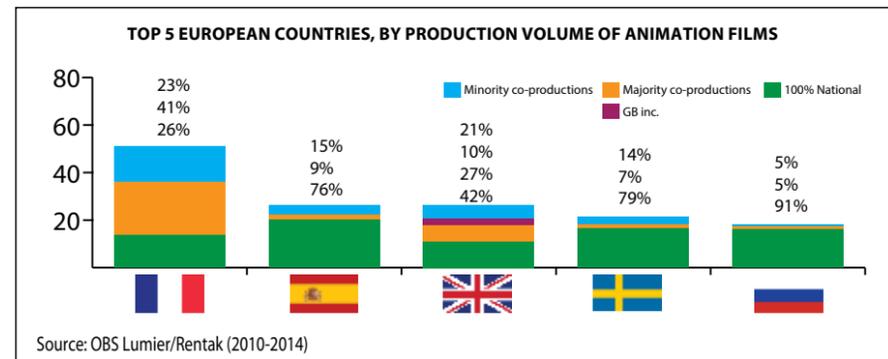
And she continues: 'The idea is to keep working for the improvement in the promotion environment in order to encourage animation and visual effects industries. On the other hand, every year we sign at least one agreement with



a festival and/or reference market of animation to favor the presence of works, creators and national companies'.

The data to defend these improvements in aid is strong enough: for every euro that is invested in animation, two are recovered for the Spanish arks. Each direct job generates two indirect jobs. Thus, Spanish animation represents 4% of the audiovisual sector but generates 20% of employment and 9% of turnover.

To conclude, **Navas** highlights: 'From every initiative that comes to the ICAA for promotion, training or promotion of film and audiovisual we always ask if animation and parity are on the agenda of the projects and that we would like to be taken into account if we support them. That's on one hand, on the other it is true that there should be a greater strategic confluence in which cultural industries would also be active'.



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Clan: innovative, quality entertainment kids programming

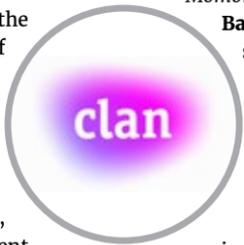


Yago Fandiño, kids content director, RTVE

Clan is the absolute leader in the Spanish kids TV with 14.3% of audience share in the 4-12 years old target. 'It is a leadership that we will have to adapt to the new multi-platform consumption habits and the decline of the European demographic pyramids', advises Yago Fandiño, kids content director of Radiotelevisión Española (RTVE)

Beyond data, the channel obtains its best result in the perception of its group of products and public service objectives, where the most strict precautions abound in the transmission of values for childhood through quality entertainment and different campaigns of environmental awareness, gender equity, promotion of reading, solidarity or advice for the responsible use of networks.

Clan core target is 2-8 years old, but it also has a good perception on the subgroup



of 9-12 years old. 'In part, this strength is because our editorial policy of avoiding the denomination "for boys" or "for girls"'. We try to prioritize EU and Spanish products, without abandon the key international drivers in the prime time slots', describes Fandiño.

For 2019, the executive bets on robust, international-quality series such as MyaGo, coproduced with Motion Pictures (Barcelona) and Piranha Bar (Ireland) that is expected to be one of the biggest releases of the year. 'We also hope to premier

Momonster, a coproduction with Big Bang Box: it is a new animation series concept complemented with an interactive plush that reacts to the audience. This character will allow us to reinforce the emotional values reflected on the show'.

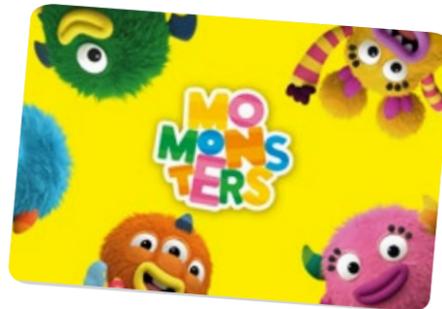
Clan is also proud of the six-episode miniseries Lunnis de Leyenda produced in collaboration with the Museo del Prado to celebrate the Museum Bicentenary. 'In these episodes we'll discover the history of the Museum, Goya's tapestries, the "Greco" or "Sofonisba" and "Lavinia". We'll also develop skills of interactive tales for Amazon Echo and Google Home', remarks Fandiño.

For the oldest ones, Clan offers a musical show called Rooster House with the most recent music news. 'This production represents for us a long investigation because we have to be capable of developing a high quality animation in a very short period of time (10 days) from the script to broadcast. Our partner Zip Zap has been fundamental in this process'.

About the industry, the executive comments: 'We are living a diversity moment: every single consumer expects a Taylor-made product, a unique and exclusive experience. We work for a generation that does not understand the



MyaGo, new animated series coproduced with Motion Pictures (Barcelona) and Piranha Bar (Ireland)



Coproduced with Big Bang Box, Momonster offers a new concept in which an interactive teddy that reacts to the audience



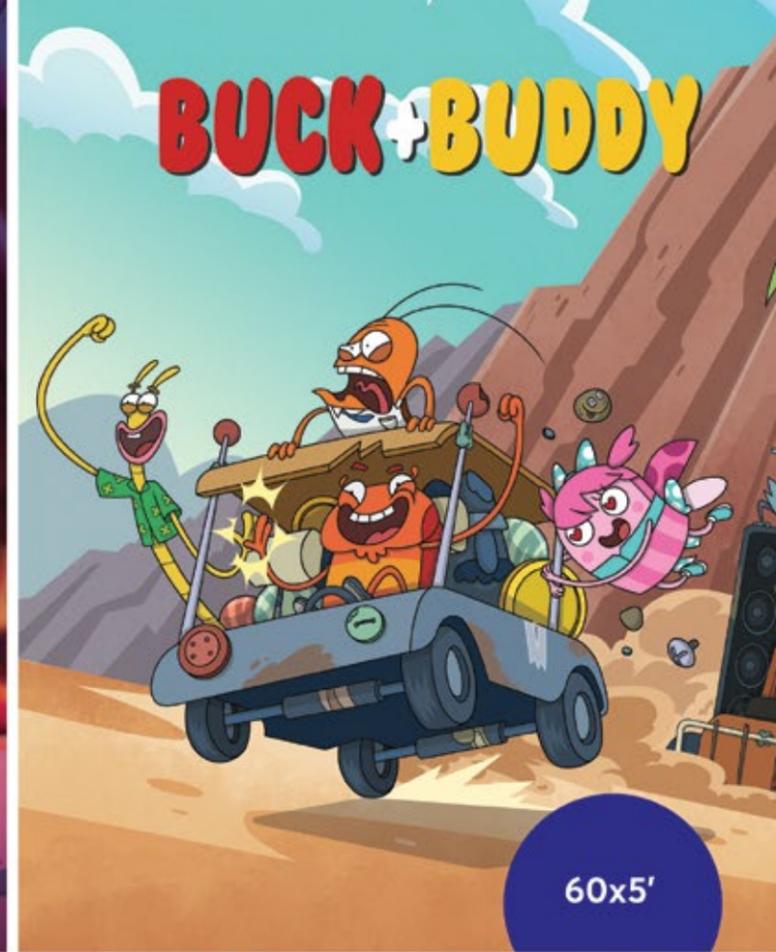
Lunnis de Leyenda is produced in collaboration with the Museo del Prado to discover the marvelous of the Museum

audiovisual consumption if it is not when and how it wants'.

He continues: 'What was a rising trend five years ago, it is now a reality. The parents face a world full of options in which recognized brands such as RTVE give them safe and smoothness. We've launched our VOD platform 10 years ago, so we are very well positioned to accompany the society in this transition. The key is to be effective, agile and to adapt to the trends, but always under the quality standards of RTVE', concludes Fandiño.



52x11'



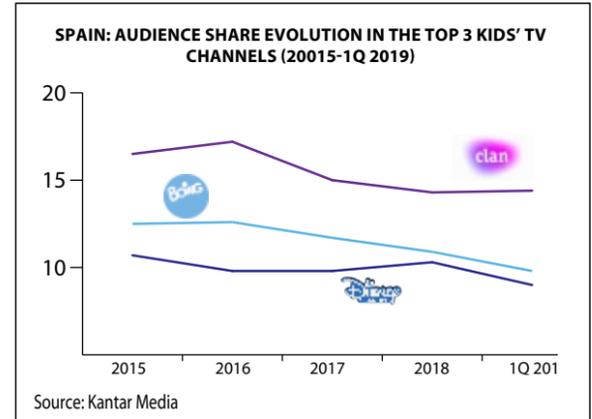
60x5'



52x12'



40x11'





Boing: humor & surprise



Sergio Sans, director

Launched in 2010, **Boing** is a Spanish free-to-air kids television channel, owned by **Mediaset España**. For the seventh consecutive year, it has become in 2018 the leading commercial kids channel with a national average share of 9.7% betting **Disney Channel** (8.9%) in the 4-12 years old target.

Sergio Sans, director, comments: 'By the end of last year we've launched a new app to enjoy our contents in any place and moment, adding also games

and extra contents 'a la carte'. This app has reproduced the channel success and in small time it already accounts with half a million downloads'.

For 2019, **Boing** will incorporate a 'big variety' of contents to its grid, starting with *The Thunderman*, a live action sitcom about a family with superpowers. Moreover, we'll have new animated series and we'll keep betting on original shows with the family contest *La Casa de los Retos*, a game show where five families will face the most funny challenges'.



La Casa de los Retos, a game show where five families will face the most funny challenges



'In a context where we have a larger programming offering, we've become a much more selective audience. And kids are not the exception: they look for contents that offer a bigger spectrum of emotions and allow them to connect with the content in a wider way. Kids, and **Boing** audience specifically, wait for us more humor, imagination, creativity and surprise', adds **Sans**.

About the future, he says: '**Boing** is a highly relevant brand in the life of Spanish kids, so we are concentrated in building that relevance in a much more complex context, and in constant evolution. To adapt and get ahead to this evolution, while we keep accomplishing with the audience expectation in our brand, is our top priority'.

'For that, we'll continue incorporating big quality content, betting more in original developments that innovate and surprise our kids, and taking initiatives that can be reflected and exploited in every platforms used by them', concludes **Sans**.

Neox Kidz: creativity and imagination

Since its launch in 2013, **Neox Kidz** has become into a key brand of the kids market in Spain offering some of the strongest international IPs such as *Pokemon*, *Angry Birds* or *Alvin!!! And the Chipmunks*, as well as own shows like a new magazine, and *MR Plinton*, which has its own series and personalizes most of the channel values, creativity and imagination, and the coproduction *Mutant Busters*, a property with huge success on TV, digital and toys.

Luis León Luri, responsible of programming at **Atresmedia Television** thematic channels, explains: 'More than a slot of programming inside **Neox**, we have always conceived **Neox Kidz** as a channel within another channel since it has its own continuity, branding, ad pie and exclusive content. It has a large presence from Monday to Friday and in the weekend we extend the emission hours within **NEOX** environment'.

Neox Kidz has complemented the Group's strategy to reach every single target. 'We have earned an average share of 2.3% in a highly-competitive scenario in Spain. We've almost tripled that figure in kids with 7.1% in the target 4-12 years old, and especially in 9-12 we reached 11.8%', he remarks.

'*Mutant Busters* was a huge success in many levels and a big experience internally. We are also premiering episodes from all our international series, and we've just confirmed *Pucca*, a franchise that will explode in every platform of the company: **Atresplayer**, social media, web and **Neox Kidz**', adds the executive.

The channel has opened a new opportunity for kids content in the Spanish FTA market: 'Having brands such as *Pokemon* demonstrates our strength as a key operator: this season the series averaged 2.2% and grows to 5.4% in kids and 8.8% in the 9-12 segment', exemplifies.

Apart from **Neox Kidz**, the **Atresmedia** is enriching **Atresplayer** with kids' content: a good example is *Pucca* that can be consumed in full in VOD along with additional content. 'We aim to keep growing like we are doing now, as well as enhancing our brand with the best content for the audience, and the best strategic deals in all levels', finalizes **León Luri**.



Luis León Luri, responsible of programming at Atresmedia Television thematic channels



MR Plinton, own developed brand



Pokemon and *Pucca*, big international franchises have found a good place at Neox Kidz

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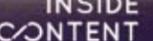
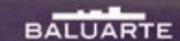
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Turner Spain bets locally



Ana González, Kids Content Director for Turner Spain

Cartoon Network's globally renowned shows have broad distribution in Spain through **Boing**, a Turner participated FTA with **Mediaset España**, which is the #1 commercial kids' channel in the country. Shows like *The Amazing World of Gumball* lead ratings in the territory and our properties have high recognition among kids, advertisers and licensees.

'In recent years we have also developed a strong VOD strategy for **Cartoon Network** in Spain, which is now available on the SVOD branded areas of **Movistar+**, **Sky**, **Rakuten** and **Orange**', describes **Ana González**, Kids Content Director for **Turner Spain**.

'Original production is at the center of our strategy in Spain. In the last few years we have produced live action game shows like *Hora de aventuras: Misión Zuzumba* and *La isla del héroe* that have been successfully released on **Boing**. Our next local show, *La casa de los retos* was launched last month: it's a game show where families can have fun together facing the most surprising challenges'.

She continues: 'One of the main objectives of local production is to create an emotional link with our audience and increase our viewers' engagement. In that sense our original productions have been a great success, as well as in terms of ratings. Some of these shows like *La isla del héroe* or *Woola* have been produced alongside other **Turner EMEA** territories, like Italy, who created their own local versions for **Boing Italy**'.



La isla del héroe and *Woola*, strong focus in original production in Spain



Turner is committed to reinforcing non-linear consumption in Spain. Gonzalez remarks that non-linear consumption is something 'natural' for kids: 'We have adapted to this with a solid SVOD offer for **Cartoon Network**, as well as a clearly defined **YouTube** strategy and the recent launch of **Boing** app which has had half a million downloads in less than three months'.

'Kids spend much time playing games or watching videos on **YouTube**. We produce bespoke content that kids can enjoy in those environments, including a portfolio of original apps and web games based on our characters. We have also developed digital native content for our **YouTube** channel. An example of this is *Toony Tube*, featuring a puppet *youtuber* who is a **Cartoon Network** superfan. This content generates really strong engagement with kids'.

Actually, *Toony Tube* was launched last summer and has reached 10 million views so far. This success inspired CN to give the character a block on its linear channel, bringing the language of YouTube to linear: 'Our aspiration is to always keep increasing our touchpoints and relevancy with kids', concludes **Gonzalez**.

Nickelodeon, a full content experience

Nickelodeon España has been the number one kids network in the Pay TV arena for the last five years, while **Nick Jr** leads the market on its business segment. The channel content has also succeeded in the FTA market, following important deals closed with key operators. On the digital side, Nickelodeon and Nick Jr. have accumulated +52 million of videos view in 2018, showing an increase of 158% compared to 2017.

Moreover, the company has developed the recreation business with the enlargement of **Nickelodeon Land** at Parque de Atracciones in Madrid, and with the new concept of Mall Entertainment Center (MEC) with two Nickelodeon Adventure: one in the shopping mal intu Xanadú (Madrid) and another in the mal Thader (Murcia). Last but not least, the family festivals such us *NickFest*, and the highly success consumer products

Laura Abril, SVP editorial multibrand, **VIMN Spain**, says: '**Nickelodeon** targets 4-12 years old kids, specializing in the segment 6-12 and getting the best results on 7-9. We program an equilibrated offer of animation and live action, mainly from our own source of content in the US and internationally, but also locally produced series such us *Pumpkin Reports* (**Motion Picture**)'.

Nickelodeon has just launched its second live action drama series *Noobees*, coproduced with **Mediapro**, and **Nick Jr** has released the animation *Butterbean's Café*. In the next months, the group will launch new episodes of its most successful series such us *The Loud House*, *Rise of the Teenage Mutant Ninja Turtles* and *Henry Danger*, among others, while we wait for *Cousins for Life*. This year the company is celebrating *SpongeBob* 20th anniversary and will have many activities on and off screen.

'Kids entertainment is evolving fast. Our strength lies precisely in the quality of our contents and that we own the majority of the properties, and our intention is to make them available in as much platforms as possible. The success for the future industry is to build third-party collaborations: while we do this with *The Loud House* and *Ninja Turtles* with exclusivity for Netflix in the US, we plan to expand these alliances in every area and every territory', concludes **Abril**.



Laura Abril, SVP editorial multibrand, VIMN Spain



Nick Spain second live action drama series *Noobees* coproduced with Mediapro, and Nick Jr new animated series *Butterbean's Café*



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Disney: 'Live shows are where we get to the deepest emotion'



Martin Iraola, SVP Walt Disney Studios Latin America

In addition to being one of the main generators of theatrical and TV shows, Disney has managed to grow in recent years in the realization of live shows from the hand of its main properties.

Good example of this has been *Disney en Concierto* (Disney in Concert), a format developed some years ago and that has come to Latin America with some good experiences, the most recent coproduced with the **Teatro Colón**, one of the most recognized classical music theaters in

Argentina and Latin America. In charge is **Martin Iraola**, SVP Walt Disney Studios Latin America, who a year ago added the supervision of Disney Theatrical Productions and Disney Music Group to his functions after 27 years in the company.

'We set ourselves the challenge of making an opera house that would unite our stories and our songs, and bring families to the theater and the balance was very positive. What started with an idea of doing three shows and it went to six with almost 200 artists onstage', explains Iraola.

The format has already had other similar experiences with **Pixar** and **Star Wars** and goes for more, seeking to add new territories and projects, all within the framework of continuing to do shows with orchestra. He also continues to develop *Radio Disney Vivo*, multiplatform show focused on millennials with 14 editions in 7 countries, and working with properties from **Disney Channel** and **Disney Junior** like *Junior Express*, with **Topa**, or *Bia*, the next live-action hit of the Company with which they seek to replicate the success obtained with others such as *Violetta* or *Soy Luna*, both in America and Europe

'We constantly seek to be more innovative and innovative, with a strong interaction with the audience and the public, always being sure of having the product we want,' remarks the executive.

'The Studio is going through one of the most relevant moments in its history, with titles like *Aladdin*, *Dumbo*, *Frozen* or *Avengers*, many with very strong music components. We have *Lion King* with Beyonce, with distribution from **Universal**, and we are working on a big project with *Coco*, an incredible property to explore in Latin America'.

'Music is everywhere, especially in a company like ours. Every week we evaluate projects to expand the territory of what has to do with the relevance of music in the audiences that love our assets', adds Iraola, and highlights the relevance of live shows. 'The look is set on the live, what people and audiences most want and enjoy... Live is where we get to the deepest emotion, and to all audiences', he completes.



Disney en Concierto



Hasbro: 'Storytelling with great characters'

Through its award winning Studio, recently rebranded as **Allspark**, **Hasbro** has become a clear example of the synergy between content and toys to develop and push the engagement to the next level.

Being responsible of brands like *Transformers*, *My Little Pony*, *Littlest Pet Shop* and *Family Game Night*, the company has bet on the development of content, both for theatrical and TV/digital platforms, in order to strengthen its licensing area.

Finn Arnesen, SVP International, explains: 'Storytelling with great characters, heart and emotion are our key drivers in the new age of entertainment. Our mission is to use immersive, cross-platform storytelling to bring Hasbro's most iconic brands to kids and families. Our focus on the market is to work closely with our partners across both linear and digital platforms and find innovative ways to execute on our omni-platform approach'.

And the company keeps adding new big characters to its slate. In late 2018, Hasbro acquired one of the biggest brands for the last 2018 to **Saban Group**, *The Power Rangers*, and introducing this year *Power Rangers Beast Morphers*, which expands the universe with tactical leather suits, its Beast Bot partners and more developed battle images.

In theatrical, the company also continues to grow, with the release at the end of 2018 of *Bumblebee*, a film that refreshes the *Transformers* saga, which began in 2007 and which gave rise to a host of animated projects, including series such as *Transformers Cyberverse*, also focused on in *Bumblebee* and a critical mission. While *Transformers Rescue Bots Academy*, where a group of young Bots newly arrived from Cybertron have the honor of being the first class to sign up for the Earth Rescue Bot Training Academy and learn how to become Earth's heroes through of practical experience.

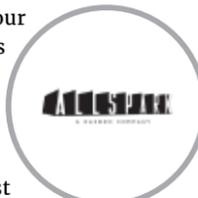
'When we designed the appearance of *Transformers: Cyberverse*, we were inspired by the clean and classic look of the original G1 style, which made it feel like the perfect fit for this new story of origin', described **Tom Warner**, SVP of the *Transformers* franchise in Hasbro. Other strong properties are *My Little Pony: Friendship is Magic*, issued in more than 193 countries around the world. The show was released in 2010 and since then it has grown uninterrupted, even having its own film in 2017.



Finn Arnesen, SVP International



Power Rangers Beast Morphers is the first season of the show after the acquisition of the brand by Hasbro



nickelodeon
CLUB 57
TEEN SUPERSERIES 60 X 60'

Logos at the bottom: AWESOMENESS, 5, COMEDY CENTRAL, ELEPHANT HOUSE, M, nickelodeon, Paramount NETWORK, TOY STORY, teletre.

The kids' industry: the challenge of being evergreen

Although in recent years, the content industry has seen important changes in general, when you look at the children's market, the changes are even greater. This is undoubtedly due to the fact that the main change is in their audience, not only in their habits but in their way of relating to the world.

The concept of "Television" went from a large element in the living room, to a screen, no matter where it is and its size. And the content, from shows produced by large generators, to a video that generates engagement. But in the kids industry, there are also new concepts such as "gamification", which means the convergence between TV and video games, an industry of over than USD 130 billion, according to IHS Markit.

A good example are series such as *The Black Mirror* or *The Adventures of Puss in Boots*, both from Netflix, where the viewer /kid can participate in an interactive way, developing the content that sees and generating according Kathi Chandler-Payatt, from The NPD Group, 'the real concept of "on demand" on those contents'.

'Young people are undoubtedly the most active audience... they have been binge viewers even before the concept appeared. Children only care to watch their favorite series, their favorite characters or the games that entertain them; they are not interested in additional information, just by seeing their images on the screen, the fun begins, that's why it's important to simplify the selection,' adds Chandler-Payatt.

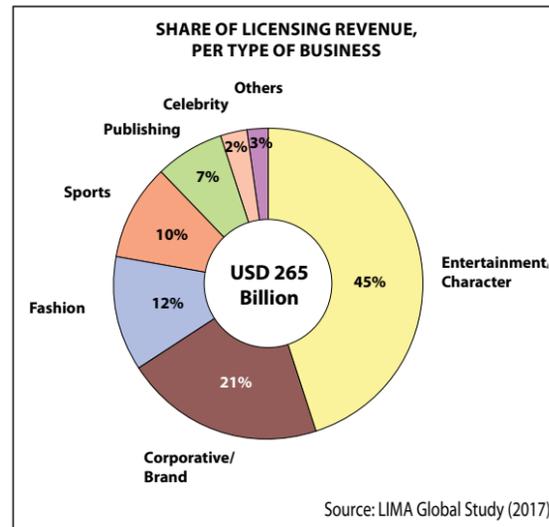
And when choosing where to see that content, the gap between ages becomes

increasingly clear: in boys aged 6 to 8, linear TV is still the boss, with pay TV channels such as **Cartoon Network**, **Disney**, **Nickelodeon** leading the ratings, but for those from 9 to 12, **YouTube**, with more than 400 hours of new content uploaded per minute, and **Netflix**, gain greater relevance from the hand of the original production.

Be original

Although in "non kids", nowadays 20% of the offer of on demand services corresponds to original production (+ 6% than in 2017), in children and youth this number reaches 22% (+ 8% vs. 2017), and the gap is expected to grow even more. In some countries such as Japan, this has been key to the development of animation, which saw a 30% growth in total sales of the genre between 2016 and 2017.

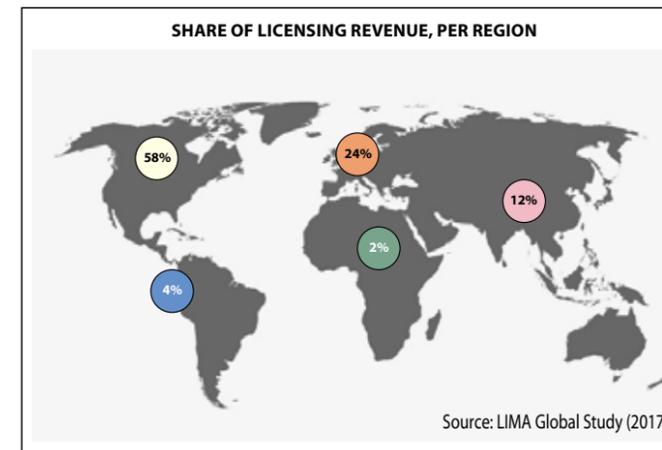
And some regions like Canada, France and Brazil are betting strong on local content, mainly by regulations that protect the screens. While in other regions such as Asia, there is a strong commitment to own production while international co-production is further encouraged. In part, because of the high consumption of AVOD and SVOD services among children, unlike



other regions where linear TV still has more weight, and that provides more windows to the content.

According to some pubcasters like **CBC** (Canada), this 'more globalized' access has reinforced the importance their work when it comes to 'caring' for the younger ones, in a more active way. 'We need to go where the kids are instead of waiting for them. At the end of the day we want content that improves the quality of life of our audience,' says **Catherine Tait**, president and CEO. Following this trend, **France Télévisions** is planning to launch its FVOD services with a strong investment in animation and local content by late 2019, as previous stage of the close of **France 4**, expected by 2020, and **BBC** (UK) is launching a platform focused on kids between 12-16 y.o. 'We must think more about delivering content in the way it is consumed, and

Spongebob (Nickelodeon) is one of the largest evergreen series, with 12 seasons and 20 years on air + movies launched on theaters



not so much based on the way organizations work,' says **Alice Webb**, director of BBC North & BBC Children's.

A new language

Which are the main trends? from the genre perspective, pre-school content is the order of the day, with universal and increasingly inclusive stories, highlighting diversity either within the family or outside it. Equality in gender between the protagonists, and less violence. In addition, there is a trend in broadcasters in the search for content associated with the protection of the Planet and wildlife- In the case of the audience +6 there is an increase in live-action with more adult themes and fiction as the genre that travels the most; but with new reality formats entering the market, such as children's news or magazines. This, however, generates a gap in 5-year-olds, according to **Leslie Rotenberg**, **PBS** (USA), a very young audience for some content, but too mature for the preschool ones.

As in the drama market, there is growth in co-productions, mainly driven by rising costs and strong competition with linear TV screens and OTTs increasing their share of original content. For this, governments of countries such as Canada, Spain, where more than 70% of the content produced corresponds to this business model with international players, or the Caribbean, which appears as a strategic region, offer tax incentives for third parties.

Licensing - Engagement

Engagement is a key word in the kids industry. Connecting with the audience from an emotional side can make a difference when evaluating the success of a content. And there's where the Licensing and Merchandising industry takes a lead rol.

According to figures from the Licensing International Merchandisers Association (LIMA), this is an industry that in 2017 generated a global revenue of 256 billion dollars, of which 45% corresponded to "Entertainment and Characters", more than double that "Corporate"

(21%) and triple that "Fashion" (12%), mostly generated by North America (58%), Europe (28%) and Asia (12%).

However, **Maca Rotter**, **Panadería** (Mexico) notes that not all brands are suitable for all products, and vice versa. 'It requires a very clear strategy or at least very versatile and above all a vision of the life cycle of the brand, as a starting point'.

From the side of the content generators, it is a tool that fulfills a double function: on the one hand to increase the engagement and interaction with the children's audience, as in the case of theme parks and hotels such as **Nickelodeon**, **CBBC** or **Disney**, but on the other, recover revenue in an industry in which the sale and broadcast of content to TV, whether digital or linear, is no longer enough to pay the costs to small and medium-sized



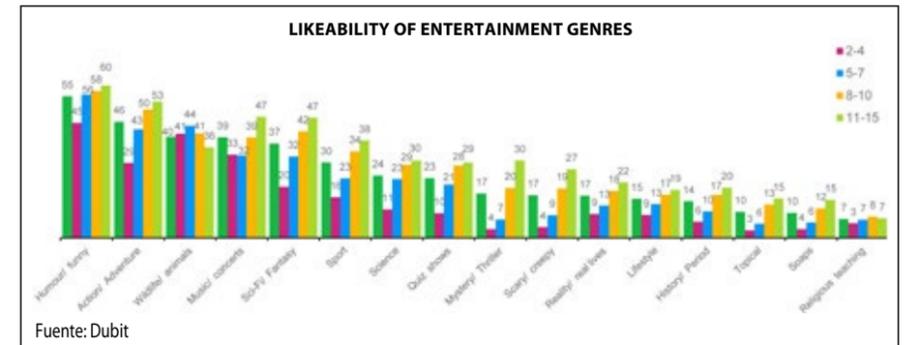
Jams (Rai, Italy) addresses issues such as sexuality and abuse



Guru Studio's *True & the Rainbow Kingdom*, premiered on Netflix as original animated preschool series

immediacy among children. Development of audiovisual content is now a big supporter of this products and allow kids to expand the world of them,' describes **Raquel Roca**, from **IMC Toys**.

This can sound like an increase in competition, but it also means new possibilities of alliances where each party provides its know-how in one of the most



independent companies.

But while the retailer still relies heavily on the robust presence of linear TV content when making decisions, the new digital ecosystem is also changing the rules of the game for them. And for this reason companies like **Lego**, **Mattel**, **Hasbro** or **IMC Toys** (Spain) develop original content based on their products. 'Toys are losing their "magic" in this era of overexposure to information and

changing and complex industries such as children's content.

In summary, the challenge in this new era is twofold: on the one hand, to stand out among so much supply, understanding that each screen, a different language and business model, and on the other, that content needs to be "evergreen", that is, its relationship with the audience managed to endure in time.



From toys to the small screen: Hasbro's *Transformers: Robots in Disguise*



The Canaries: a land of opportunities



Natacha Mora, coordinator of Canary Islands Film

The Canary Islands have gained a place as a leading destination for film shooting. A growing number of producers have chosen its scenarios in the last years

for one main reason: a highly attractive tax incentive scheme with which few countries can compete and that is well above the ones that apply in the rest of Spain.

It allows deductions of up to 45% to the first million invested (and 40% for the rest) to national productions or co-productions; and up to 40% to international ones. Due to its ultra peripheral status, the Islands enjoy an own special Economic and Fiscal Regime (REF) that guarantees the diversification and empowerment of its economy and

CANARY ISLANDS INCENTIVES
40% Tax rebate for foreign productions
45-40% Tax credit for national productions or co-productions
4% corporate tax rate
0% VAT for audiovisual productions
45% Tax rebate for R&D and IT

Source: Canary Islands Film

advantages for key sectors. Thank to it, the specific incentives on film production in the Corporate Income Tax Law, are increased by 20% and the limit is 80% higher than in the rest of Spain.

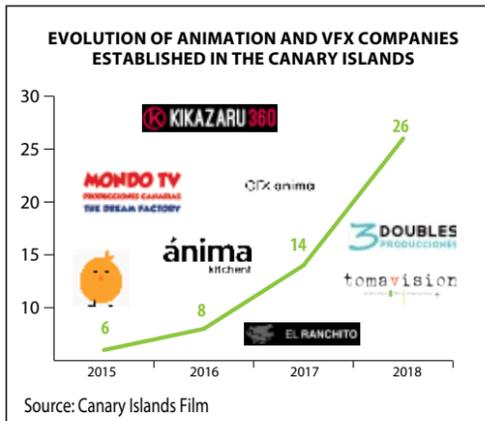
Regarding animation, the Government released a modification introducing two improvements in the text applying the tax incentive for foreign productions in the Canaries

The deduction of the incentive for international productions, 40% tax rebate, is now capped at €5,4 million (it was €4,5 until now). For post-production and animation, the minimum expenditure in order to apply the tax rebate is 200.000€, and for all the rest (films, series, documentary, drama), it continues being a €1 million minimum expenditure (from a €2 million minimum total budget of the project).

Other reasons are its mild climate (+3,000 hours of sunlight throughout the year) and landscapes; hotel infrastructure and excellent air (4 hours from most of European capital cities) and sea connections; security and health system; state of the art technology; local talent and ad hoc training programs.

Since 2015, several producers have settled down in the territory as a Canary Islands Special Zone (ZEC) company, enjoying the benefits to pay a reduced tax rate of 4% on the profits in the Corporate Income Tax, while they are also able to repatriate their dividends back to their mother company with no withholding tax on it.

From 6 producers established in 2015 to 26 in 2018, including Italian **Mondo TV**,



Source: Canary Islands Film



Barcelona-based **Tomavision**, Spanish/Mexican **Anima**, and Germany's **B-Water**; two created here: **People Moving Pixels** (Stafan Fjeldmark and Linni Rita Gad) and **3Doubles**; France's **Birdland** (a branch from Amuse) and Austria's **Arx Anima**, as well as **Perruncho** and **La Casa Animada**.

In addition, the Canary Islands Government is about to call subsidies in an amount of more than €1 million for development and production of Canarian animation, drama, and documentary productions and co-productions.

Internationally, Canary Islands is growing in the recognition of these benefits. The territory wants to grow in numbers and in the role the established studios play (service or co-productions). The top priority is to strengthen the business ecosystem, to create a whole-circle industry with solid companies ranging from original content to animation services, permanent training programs, and an improved tax system.

All the Kids



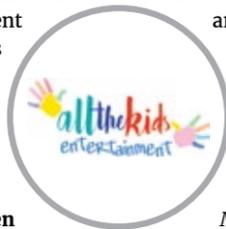
Joanna Carrion, CEO & founder

All The Kids, which specializes in bringing fresh and original TV content to the global kids, tweens and teens entertainment space, is actively developing formats for prestigious entertainment companies such as **Mediapro**, **Plano a Plano**, **New & Co**, **Funwood Media** and **Tomavision**.

It works alongside celebrated and award-winning scriptwriters such as **Solange Keoloyan** (*Violetta*, *Florencia*) and **Steve Aranguren**

(*The Penguins of Madagascar*), and it has recently signed with **Javier Ródenas** (*La Pecera de Eva*) for TV script development.

The company has also initiated a strategic alliance with **El Cañonazo** for the development of the innovative transmedia series *Time to Face* and a kids' dance program with Spanish dancer and choreographer, **Sergio Alcover** (*Fame on Cuatro*); and has two strategic partnerships with the producers **Onza Partners** and **POW WOW** for international projects.



All The Kids also offers consultancy in the entertainment arena, and it is currently developing a project for the **Museo Thyssen** in Madrid, as well as the development of a consumer products IP, *Lua y Marcos*, to take it to TV.



Imira: global hits



Paul Robinson, CEO

Now in its 16 year, **Imira Entertainment** is a key independent producer and distributor of premium kids series representing some of the most prestigious producers and brand owners. It has a large catalogue aimed at the Spanish and Latin-speaking markets, with many of our series dubbed many languages.

Paul Robinson, CEO: 'We have created produced and distributed global hits such as *Lucky Fred*, *Lola & Virginia*, *Vitaminix* and *Sandra The Fairytale Detective* and the company is now embarking on its next production, the gender-neutral kids' comedy series, titled *Mondo Yan* (52x'12), a co-production with **TV3 Catalunya**,

Telegael and **Toonz Media Group**, which is currently in production'.

The company is well positioned for its new 100 title-strong catalogue which covers all genres, all kids targets from preschool to tweens, including 2D, 3D and live action, and with multiple language versions available. 'We have a large focus on comedy heavily demanded by broadcasters and platforms, and short format series that fit perfectly in the digital and telco space', he adds.

Some of the new productions for MIPTV are *Panda and Krash* (52x'11) from **Fun Union**; *Miniforce X* (52x'13') from **SAMG**; the non-dialogue action comedy *Spy Penguin* (26x5') from **Next Animation**; the non-dialogue comedy *Buck and Buddy* (60x5') from **Lil Critter Workshop**; and the recently completed comedy, *Sindbad and The 7 Galaxies* (26x11') produced by **Toonz**. Aimed at a younger target, the



Mondo Yan, co-produced with TV3 Catalunya, Telegael and Toonz Media Group



educational preschool series *The Story of Bookworm Gogo* (104x5'). 'Imira will this year aim to further add to our excellent catalogue of acquired content from established and new producers worldwide and to continue the strategy to bring more co-productions and original shows to the market. We want to find authentic stories from Spanish speaking markets and around the world that will delight and entertain kids worldwide. We want to be a destination for the very finest kids and family content for audiences wherever they be in the world', concludes **Robinson**.



Mondo TV Producciones Canarias: huge potential



Maria Bonaria Fois, GM

Launched two years ago, **Mondo TV Canarias** is a division of the Italian animation group **Mondo TV** that offers visual developments and pre-production service for all sorts of animated series. It is also part of the **Tenerife Film Commission** and one of the leading animation studios based on the island.

Why Canarias? **Maria Bonaria Fois**, GM **Mondo TV Iberoamerica**, answers: 'We saw a place with huge potential: Tenerife brings together an appealing and attractive location with the capability to host all kinds of audiovisual productions. Animation has become an important sector with great benefits, and, thanks to the tax incentives Canarias became the perfect place to help us

localize most of the work on the animation chain. We aim to transform the studio into an international hub for the creation, development and production of top-quality projects'.

In **Canarias** the company is working on the visual development and pre-production of *Invention Story*, a 3D CGI co-production with **Henan York Animation** (China); *MeteoHeroes* (52x'7), an animated eco-adventure co-produced with **Meteo Operations Italia** (MOPI) that will be available by 2020; and in the second season of *Bat Pat*, a 2D series co-produced with Italy's **Atlantya**, in which RTVE's **Clan** has confirmed its participation.

Bonaria Fois: 'While distribution remains a key function, we consider the development of original content to be one of the pillars of our business plans for the future: we are increasingly involved in co-productions, the management of format production in different markets, IPs and licensing merchandise'.



Invention Story, a 3D CGI co-production with Henan York Animation (China) is being developed by Mondo TV Producciones Canarias

Building on successes such as our live-action drama comedy for teens and tweens, *Heidi Bienvenida*, co-produced with **Alianza** (Argentina) for **Nickelodeon** (premiered on **Disney Channel Spain** with all episodes available at Disney app), **Mondo TV Iberoamerica** now pushes the drama/sci-fi series *2050* co-produced with **VIP 200 TV** (USA) and **Casablanca** (Brazil). 'We have just announced an agency agreement with **Azteka Films** (Argentina) with the aim of developing key fiction projects', concludes **Bonaria Fois**.

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Conecta FICTION 3 renews



Geraldine Gonard's Inside Content

Conecta FICTION is moving on its third edition to Pamplona-Iruña (Navarra), held on June 17-20 at Congress Centre and Auditorium of Navarra, Baluarte. Driven by Clavna, Navarra Audiovisual Cluster, it is supported by the local Government through the local business development entity SODENA and Infrastructure Culture, Sports and Leisure NICDO and Fundación SGAE.



Geraldine Gonard's Inside Content is responsible for the design and the production of the event that has become a key point in the audiovisual calendar promoting networking, fiction co-production and exchange of talent between America and Europe

'Moving onto a new location is an incentive and an additional charm. Santiago de Compostela has been a fantastic scenery for the first two editions, and now in Navarra the participants will have the opportunity to see the excellent conditions for the city and the possibilities it offers regarding shootings and tax incentives', she says.

'Our even must preserve its reduced number of participants in order to be truly effective: this is the most important idea and the one that we want to fully maintain. We want to keep working with high profile executives, so decisions can be made during the event and we can ensure a real business environment. Several projects that have born in Conecta FICTION are now in production. We are also going to organize more workshops'.

'We have never lived this fiction fever, neither had the industry been so open to sit down and face challenges in an aggregated manner. The arrival of global platforms has fortunately broken down many barriers, and there is no turning back. We are very lucky to be able to live this historical moment, and the co-production is a reality and a necessity to which the industry has turned around for years'.

Peekaboo: more production in 2019

The Barcelona-based production house Peekaboo Animation has enlarged its development pipeline with a new book-based project called *My Little Heroe* (52x'11) targeted to a bridge gender-neutral audience (5 to 8 years old) and introduces historical characters in their child version like: Rose Parks, Nelson Mandela, Michelangelo, Coco Chanel, Mozart, Maryam Mirzakhani.

The project is based on a collection of more than 100 biographies targeted to kids originally created in Spain by EMSE Publishers but also published in Italy, Belgium, Portugal, Greece, Romania and South America. The TV adaptation is currently an on-going development with a Canadian partner and new materials are expected during 2019.

Peekaboo is also delivering by end of this year the kids comedy show *Rocky Kwaterner* (52x'12) in coproduction with Monello Productions and Mondo TV



My Little Heroe: historical characters animated

Kingstoon: boosting the Jamaican industry



Debbie Powell, creative director TV Jamaica, with Tristán Alleyne, promotion officer at JAMPRO and Carlos Biern, business development, with the Jamaican delegation at Kidscreen 2019

From April 5 to 7 at the University of Technology, Jamaica will received close to 1,500 executives to the third edition of KingstOon, an international animation, market and festival conference organized by the Office of the Prime Minister in partnership with the World Bank.

The event seeks to attract the attention of international investors for production services, at the same time that it promotes the development of young developers.

Among the main participants confirmed are Carlos Biern, animation consultant; Bradley Kravitz, Toon Boom Animation (Canada); Camille Selvon Abrahams, Animae Caribe (Trinidad and Tobago); Douglas Little, Wacom Technologies; Louis Hillelson, Reed Midem; Rick Farmiloe, Disney animator; and Sir Wade Neistadt, animator and artist VFX, youtuber.

Tristán Alleyne, promotion officer at JAMPRO, describes: 'Our idea is to build a framework around the developing animation industry with the support of private and public film funds, and show to the world that things are happening in the Caribbean'.

'We have young fresh talented animators and competitive prices, which, along to the support of the Government and the Private sector, create the full necessary ecosystem to develop the industry', he completes.'



Iván Agenjo, CEO

France, about a prehistoric boy who has to adapt to XXIst century life after getting unfrozen from a glacier. The series was selected in 2018-coproduction call by RTVE, and Kids First (France) handles global sales.

The company also accounts with the upper preschool slapstick show *Mironins* (26x'7) currently closing its financing stage, and *I Elvis Riboldi* (52x'11'), an edgy kids comedy show presold to 130 territories. First episodes will be available by MIPJunior 2019 while the series will be delivered by 2020.

Iván Agenjo, CEO: 'We are always looking for new ideas that could turn into fresh content for the international market, and we specialize in adapting children stories from book to screen. However, we are also working on a couple of original ideas, yet in early stages, for both preschool and older kids. In parallel, as distributors, we also look for ready-made content to represent in our core markets'.

ANIMAR

ARGENTINE ANIMATION CLUSTER



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The Spanish animation and visual effects industry: a bridge to the future

Spain is the 5th world and 2nd European producer of animated feature films with 28 productions in the period 2010-2014. Over the next 4 years, more than 90 feature films, more than 140 series and around 400 short films will be launched, positioning Spain as a strategic global animation provider. Let's take a look at this amazing market.

According to the Whitepaper of the Spanish Animation published by the Spanish Federation of Associations of Animation Producers, DIBOOS, the Spanish animation sector is made up of more than 250 companies that are mainly concentrated at the country's two biggest regions: the Community of Madrid and Catalonia. But while other regions such as Navarra and Canarias have been offering better tax conditions, the Spanish producers have been moving to there recently.

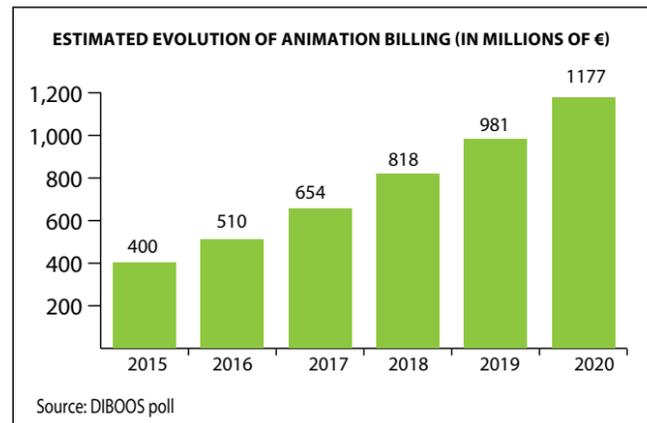
The industry of animation and visual effects invoiced €654 million in 2017 and employed 7,450 professionals directly. It represents only 4% of the number of companies in the audiovisual sector. However, it generates 20% of employment and 9% of the total turnover of that sector. Almost half of the companies active today did not exist 10 years ago. It is an atomized sector, composed mainly of Small and Medium-sized Enterprises (SMEs) with predominantly Spanish capital. 65% of them invoice less than €500,000.

It is expected that by 2020 the Spanish industry will exceed €1 billion in turnover, with an average annual rate of growth of 24%. Employment growth of 11.17% per year is expected, reaching 10,000 direct jobs and 40,000 professionals in total linked to the animation industry by 2020.

90% of the companies are dedicated to the production of content, both for TV and for cinema. Already half of them are engaged in the production of animation content for mobile and new digital channels; 72% have generated their own IP and 42% industrial brands; 60% of them export: 45% to European markets, 23% to North America and only 10% in the Middle East and Africa. The North American market is the top destiny for Spanish animation, accounting with 52% of



Wonder Park is the most recent American-Spanish adventure and comedy film produced by Paramount Animation and Nickelodeon Movies, with Madrid producers Ilion Animation Studios working on the animation; from Spanish animator Sergio Pablos (Despicable Me co-creator), Spa Studios and Antena 3, the animated movie Klaus will premier on Netflix on Christmas 2019



total revenues, followed by the in-home market (Spain), Rest of Europe and Latin America; Asia represents both challenges and opportunities, due to the difficulties of introduction and its huge potential in terms of audience.

Content & talents

DIBOOS's Whitepaper said the average budget for a feature film is estimated around €12 million; for a 13-hours series some €3 million; and for a short film of less than 10 minutes, around €60,000 thousand. In Spain, the most produced content are the series (74%), followed by feature films (58%) and short films (44%).

According to data developed from the projects presented in the last editions of the 3DWire festival, on average, international co-productions in the sector are around 24%. For the series, the average of co-productions with other countries is 28% of the total. For the feature films, the average is higher, reaching 36%, which places the animation at the top, with respect to the productions of feature films in general, which in the last 5 years is around 32%, according to the Spanish Institute of Cinematography and Audiovisual Arts (ICAA).

In Spain, 15.23% of cinema tickets go to animation films. However, the share of Spanish feature films that are projected in national cinemas is small compared to that coming from other countries: in 2016 it represented only 19.2% of the total, and never exceeded 25% in the last 6 years. Even so, the Spanish feature films enjoy wide acceptance at the national box office: Tadeo Jones 2: The Secret of King Midas and



Anima Kitchent has installed in Gran Canaria to develop the new series of Cleo & Cuquin, as well as Italian Mondo TV in Tenerife who is producing its new series MeteoHeroes, launched last MIPJunior

Deep accounted for 20% of the total box office in Spain in 2017 and 22% of all the Spanish cinema box office for this year.

The Spanish talent has been working in several Major movies, such as Wonder Park, from Paramount and Nickelodeon on theatres since March 15, and with the animation from Ilion Animation Studios; Klaus from Spanish animation Sergio Pablos —well-known for being the co-creator of Despicable Me—, Spa Studios and Antena 3 Films that Netflix will premier next Christmas; and Kanaki's Another day of Life, which won the "Best European Animation Movie". On Visual Effects, El Ranchito's supervisor David Ramos has won an Emmy for its work on the 6th episode of the 7th season of Game of Thrones (Beyond the Wall).

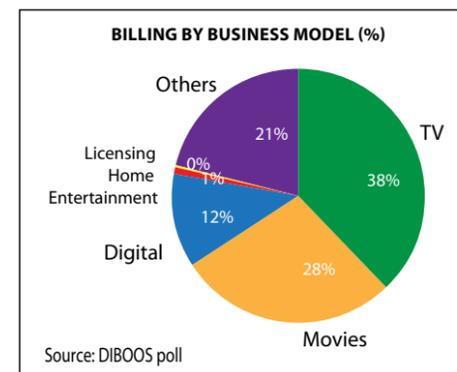
Platforms

TV brands dedicated to animation in Spain are leading RTVE's Clan (4-12-year-old), Mediaset España's Boing, FTA Grupo Vocento's Disney Channel and Atresmedia' Neox, and altogether they sum up 7.1% of the total audience share. The share obtained by national animation productions on TV channels is very low: it did not exceed 13.1% in 2013. In terms of advertising, Disney Channel and Boing concentrated 80% of total investment from the Toy sector during the Christmas of 2016.

However, animation has considerable success in TV, as evidenced by the offer of thematic channels in both open channels and Pay TV. According to the latest Barlovento report, in the total set of Spanish channels (FTA and paid), the genre with more presence in the programming grids is fiction with 41.3%, and within this genre, animation ranks third (16%), after feature films and real image series.

Clan is the channel that bets more in Spanish animations: more than 30 series have been co-produced in the last 5 years. Canal Super3 from Corporació Catalana de Mitjans Audiovisuais (CCMA), stands out as the only one that has invested regularly and constantly in animation series for more than two decades. It gathered 1.4% of total audience in Catalonia in 2017, and its annual investment is around €1.5 million.

Moreover, RTVE has released Clan Internacional in the Americas putting strong emphasis on the own and co-produced contents from Spanish and independent European producers, which represents almost 80% of the total programming. It is available already in Movistar Colombia, operators in Argentina and Chile plus México, Costa Rica and Panama, as well as the US Hispanic.



DIBOOS, a more collaborative industry



Formed by the main associations AEPA and ProAnimats, DIBOOS represents more than 90% of Spanish animation production, a sector that is expected to generate more than €1 billion (USD 1.13 billion) per year from 2019 on, and with close to 40 companies associated.



Carlos Biern, president

Carlos Biern, president: 'We defend animation on a double aspect: as a generator of culture and as an industry. On the first, it produces an imaginary of its own that must be preserved, in addition to disseminating the appropriate values for children. On the second, the sector claims its character as a generator of stable employment, exporting (70% of the turnover of these companies comes from abroad) and in the growth phase (based on its tenacious use of R + D + I)'.

'Spanish producers have a unique mix in the global arena, building a perfect bridge between Europe and the Spanish-speaking audiences, with a vast experience in international co-productions. We have talented artist who have won awards in international festivals, innovative and well recognized digital software, and visual effects companies... together with top productions distributed by the leading global players in theatrical, TV, VOD and merchandising sectors', adds Biern.

All these skills, founded on the work of great animation and visual effects academies, together with recently upgraded incentives, new supports and coproduction by Ibermedia, have turned Spain into a key global partner. 'We created an interesting community to develop animation content in Latin America and we are committed to seek joint development with talent above all', he adds.

Biern concludes: 'It's very painful to see that projects with a Latin essence that last year were successful in films like Coco or Ferdinand have been developed in USA. But at same time it shows that Latin content can work well globally, and that we have to start thinking on a more collaborative market. There are enough examples to say that contents that are produced in Ibero-America can be exported, and I notice that there is a collaboration from everyone to make this happen'.



SPANISH COMPANIES THAT HAVE RECEIVED PUBLIC AID, BY TYPE		
Country	Deduction	Maximum amount of the deduction
Spain	20% tax rebate	€ 3 millions
Spain (Canarias)	40% tax rebate	€4.5 millions
Spain (Navarra)	35% tax credit	No
France	30% rebate	€ 30 millions
UK	25% tax rebate	No
Belgium	40-45% tax shelter	
Ireland	32% tax credit	
Italy	30% tax credit	

Source: DIBOOS poll

New business models

The most notable exponents of the high technological level of this industry are the Spanish software and visual effects companies, which in recent years have generated important commercial successes and recognitions and awards. Animation productions transcend its format and generate spillovers in other sectors: advertising, videogames, education, books, interactive, apps, toys, textiles, etc.

26% of Spanish companies are carrying out developments for VR or AR, and 63% want to do so in the near future; 73% of companies intend to work in original series exclusively for pay TV providers and over the top (both national, as **Movistar +**, and foreign, such as **Netflix**, **Hulu**, **HBO** and **Amazon**). Already 9% of companies are currently working on these productions.

The turnovers continue to depend in large part on the traditional business models, TV and cinema, which together represent 66% of revenues, while digital business models (online distribution, digital licenses and digital derivatives) account for an average of 12% of turnover and are expected to become more important in the future; for some companies, they mean almost 100% of the income.

Alternative business models, such as the provision of services, advertising, consulting and training, account for 20% of the industry's revenues. Also, public aid, above all regional aid, is an important source of funding: 50% of the companies surveyed declare that they have received some type of public aid, whether at the regional, national or European level.

The investment in a Spanish animation leads to a deduction of 25% on the first million of the base of the deduction and 20% on the excess

from the first million (Canary Islands: 45% on the first million and 40% on excess, Navarra: 35%). The execution of the production of a foreign work in Spanish territory is entitled to a deduction of 20% on the expenses incurred (Canarias: 40%, Navarra: 35%). There are more than 20 international co-production agreements ratified by Spain. From them, only three (China, India and Israel) pick up some of the specialties presented by the production process of an animation work in relation to the execution of certain works (storyboard, layout, main animation).

Challenges

Spanish companies unanimously identify access to financing as the main factor that represents an obstacle to their development, according to **DIBOOS'** Whitepaper. Public aids from the Spanish State and the spending of the TV channels are diminishing, and the new channels and platforms by Internet do not offer at the moment a solid source of returns. In particular, the level of TV investment has evolved in recent years with a worrying downward trend. The main cause is the decrease in the profits of these companies over time, which is directly reflected in the reduction of the obligation to finance.

The other major challenge is the retention of talent: in an environment of unstable financing and not enough, it is very difficult for companies to ensure sufficient continuity of projects and this ends up generating high turnover of staff and that many of our professionals. They end up developing their careers outside of Spain.

Spanish companies also need to invest more in promotional actions throughout the life cycle of their productions, if they want more visibility in international markets. The incentive system at the State level should be reinforced: contemplating its annualization and the pre-approval of the investment by the Treasury Administration; extending the limit of rebate to the incentive for international shootings so that it is situated at the level of the countries of our environment; designing a fiscal incentive that stimulates both the production of feature films and animation series.

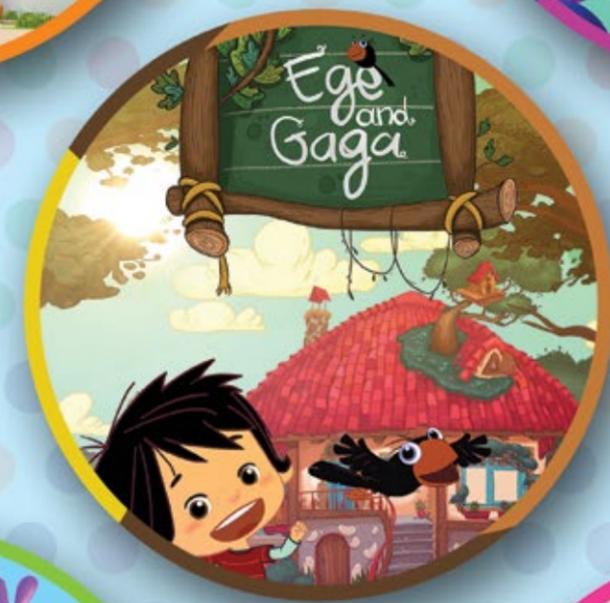
Last but not least the strong competition from the US. From the 188 animated films released in the EU in 2014, the 44 US productions had a market share of 71.6%, while the 107 European animation productions only they got 20% of the audience. In contrast, European productions represent 3% in North America.

There is a strong imbalance in European TV programming: according to the latest edition of the **Eurodata TV Kids TV Report**, international productions represent in Spain and Italy 88% and 75%, respectively; in Germany and the UK, just over 60%. Only France more than 60% of programs placed on the grid of children's channels are local. In this battle, public children's TV channels play an important role, as they still attract one in four spectators in Europe. They are the most efficient in the development of their audiences, obtaining a market share four times greater than their weight by number of channels (European Audiovisual Observatory).

With the aim of defending the interests of the European animation industry, Animation Europe, the European Federation of animation producers, was created in 2016 gathering 15 associations from 13 countries, including **DIBOOS** and **Pro-Animats** from Spain.

Its main objectives are: a) to get TV and OTT platforms in Europe to invest in continental productions, b) to ensure public funding at European, national and local level for the production of films and animation series in Europe; c) to maintain a regular and constructive dialogue with the European authorities on the regulation and financing of the animation industry.

The European Commission has approved a European Plan for Animation, which establishes three objectives for the following years: first, promoting the reach and global appeal of European animation; second, make Europe a great place to work for European and international talent; third, facilitate access to financing.



Successful Spanish TV Series: Zinkia has launched the four season of **Pocoyó**, coproduced with YouTube and globally commercialized by Brands & Rights 360; **Lucky Fred** (Imira, Televisio de Catalunya, Rai Fiction and Top Draw Animation) is one of the greatest Spanish animation successes, sold in more than 165 territories, and season two is under production



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Cordoba: “Centro de Animación Quirino Cristiani”



Jorge Alvarez, coordinator of the Polo Audiovisual of the Province during the inauguration of the First Animation Production Center Quirino Cristiani in Unquillo, Cordoba, with the Governor Juan Schiaretti, Jorge Fabrisin, Mayor of Unquillo, and Roberto Avalle, Minister of Industry, Commerce and Mining

Italian-Argentine creator of the first animated feature film in 1917 that lived in this region.

It has been built in an old house of almost a century of life that was restored (USD 200,000 were invested by the Government) to become the headquarters of 12 producers of the Province: **El Birque, Osa Estudio, Bixel, Ilusionario, Volando Alto, Cha Animation, Potaje Creativo, Guasuncho, Cien Volando, Muchas Manos, Martin Eschoyez** and **MeuAnimacion**, gathered at the **Association of Animation Producers (APA)**

The Center was conceived as a place of shared work, where companies can develop their projects in a favorable atmosphere, promotion and dissemination of the Province talent applied to the audiovisual industry. The spaces are assigned to companies per project, depending on the number of people and the time it takes. The rotation of companies and projects within the establishment is guaranteed, generating wealth in that interaction of human and technical resources.

This action is part of a bigger provincial policy towards this strategic industry: similar initiatives are being inaugurated in Villa Maria (music center for audiovisual productions), San Francisco (advertising and commercials productions) and Río Cuarto (transmedia content), placing Cordoba at the forefront of audiovisual production at the national level.

In April 2017, the Province enacted a pioneer Audiovisual Law that brought concrete tax benefits to local producers, and for co-productions partnerships between local and international producers. The law has its own fund, which worth USD 1.25 million this year, distributed in *Funding Programs* and *Co-Production Incentives*, apart from a cash rebate subsidiary for the advertising industry (up to 50%), the support to participate at international tradeshows, training and trade missions.

COTB: “Fantastic in the animation”

Promoted by **RAI** and produced and organized by **Rai Com**, *Cartoons on the Bay* welcomes at its 23rd edition around 1,000 professionals and 900 primary and secondary pupils each year, while more than 7,000 people attended the three-day programme, divided in “Professional”, “School” and “Public”, with screenings and retrospectives.

The festival offers an official competition divided in 8 categories. It receives every years more than 500 works from 50 countries in competition. An International Jury, composed of five leading figures, awards the best work of each categories,

Animar: Argentine animation for the world



With more than 10 years in the market, the animation & VFX producers **Can Can Club, Caramba Studio, Malabar, Hook Up Animation** and **Malditomaus**, assembled at **Animar Cluster** to strategically position Argentina for production, co-production and services, in an associative way. More than 8,000 minutes of animation have been produced for **PakaPaka, Cartoon Network, Disney, Discovery, Fox, Nickelodeon, Warner, MTV** and **NBCUniversal**.

This year, **Animar Cluster** will have presence in 12 international markets with the support of the **Argentina Investment and Trade Promotion Agency (AAICI)** and the **ICBC Foundation**. **Laura Gagliesi** represents and coordinates the Cluster offering a catalog of more than 15 projects in development and production.

She is in Tenerife promoting key projects such as **Can Can Club’s Dos Pajaritos** coproduced with **Palermo Estudio** (Uruguay), which won 3 awards in Animation!-Ventana Sur (Argentina) from **Señal Colombia, MIFA-Anney** and **Liga de la Animación Iberoamericana** (Animation!, Premios Quirino and Pixelatl).

Caramba Estudio promotes *King of the Worlds* (52x’11) co-produced with Copernicus (Canada); *Mystery Network* (26x’11) with **Split Studio** (Brazil), and continues the production of *Dixi Detective* (27x’2), and its new series for adults *Joe Thunder* (13x’22) for which is searching co-production partners.

Malabar’s Basurama won a development contest from **INCAA**, while it has started the production of *Robotia Temporada 2* (13x’13) co-produced with **PakaPaka** and a feature film based on the series; *Monsters of the Guard* (13x’11) got a “Patronage” from the City of Buenos Aires and will be added to its catalog of animated content along with *Mati and Rocco* (13x’7) and *Minimalitos* (91x’13).

Hook Up Animation produces the feature film *Gilgamesh* and the series *El Canal de Gina* co-produced with **PakaPaka**, while it presents for co-production *Go-Yello* (26x’11), *Rock D ‘House* (26x’11) and *Baloca* (26x’11). **Malditomaus** has solid experience in creating visual worlds through VFX and immersive technologies with more than 30 films and international series. It is currently working on the animated feature film of the chicken *Turuleca*, and Argentine-Spanish co-production.

assigning the prestigious **Pulcinella Awards**, while US has been selected as Country of the Year.

The topic will be *Fantastic in the animation*, with two important exhibitions called *Dragonero* and *Topolino: the story of a pop star*. The objective of the event is to open a window on the international animation market and with this event wants to understand in which way the Italian market can meet the international world, ensuring the high quality of the works in competition and in the international showcase, with the presence of important stars in the animation field.



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Viacom: latest trend



Rita Herring, SVP, Content Distribution

Viacom International Studios launches in Cannes its new preschool series *Abby Hatcher* (26x30'), the brand new CG1 animated series from the makers of *PAW Patrol*, *Spin Master Entertainment*. The show follows Abby, a kind-hearted seven-year-old, who goes on wild adventures in her family hotel with her magical friends, the Fuzzlies. This charming and hugely likeable Nick Jr. series champions the power of optimism, compassion and friendship. *Abby Hatcher* will roll out internationally this spring.



The Viral Factory, interactive gameshow

Other big new is *The Viral Factory* (7x22'), an interactive children's gameshow format that taps into the latest trend for content incorporating social media-led video creation. The weekly series is a competition during which celebrity YouTubers help fans create their own viral video clips. Once posted to a relevant **YouTube** channel, viewers can then vote for their favourite clip. The multi-platform format first aired in the Netherlands and Belgium as *De Viral Fabriek* in March 2018.

Lastly is **Nickelodeon's** live action series *Cousins for Life* (20x30'). Created by live action stalwarts, Kevin Kopelow and Heath Seifert (*Austin & Ally*, *All That*, *Kenan and Kel*), the series centres on 12-year-old cousins Stuart and Ivy. After Stuart's mother is deployed overseas, his fun-loving dad, Clark, decides to move the family to Portland to live with his uptight brother, Lewis, bringing the cousins together, where they team up and become unstoppable. Full of comedy and heart, with a positive, empowering undertone, *Cousins* debuted on Nickelodeon's international channels and branded blocks from March 2019.

Tomavision: expansion



Mercedes Marro, director

Based in Barcelona and Tenerife, **Tomavision** is a production company with over 15 years' experience in the international kids market offering a wide range of services including 2D & 3D animation. It develops and provides scripts, storyboards, animatics, animation 2D-3D, compositing, voice over, music, live action integration, etc.

The company takes full advantage of the Canary Islands' tax rebate (40-45%), and thanks to this extensive know-how and experience it is fully prepared to help out any production interested in producing premium content on a co-production or service work basis, and it can also come in as GAP Financing.

Director **Mercedes Marro** and executive producer **Pierre Nothman**, along with an international team of talented professionals, are the acclaimed team behind the 2012 Emmy's Nominated TV series *Ask Lara*, and the short film *Water Path for a Fish*, multi-awarded and selected in the NYICFF among many others.

TRT: the best Turkish animation

Turkish Radio and Television (TRT) is the only Turkish TV channel to own a separate channel for kids that produces the best animation series in Turkish animation industry: **TRT Çocuk**, and those contents are available worldwide through global distributor **MISTCO**.

'Now, we have more than 60 animation titles in our kids' catalogue for different age groups', explains **Aysegul Tuzun**, VP Sales & Marketing at **MISTCO**. During their production process, prominent editors review all of these titles, and this year, as a pioneer, **TRT** has produced a brand new series only for kids, which will be launched at this MIPTV.

Our new kids' title is named *Little Archer and the Legend*, and the story is focused on the extraordinary adventure of a 10-year-old boy named Mete whose biggest dream is to become an archer.

In Cannes the distributor is offering *Aslan*, showing a very clever and funny boy going to elementary school. He comes with up extraordinary inventions and solutions created in his limitless imagination to solve the problems he faces in his daily life or at school; *Momo* is a very smart bunny living in a forest with his friends. He is gifted with a very special ability of finding lost things; and *Atishoo*, a curious and active child whom children may identify themselves with. He lives with his friends in a lovely village.

'Regarding our animation sales worldwide, it is an honour for us to announce that recently we have closed new deals for our animation titles. These deals both include linear TV channels in Bosnia and Albania as well as a package deal for 10 titles with **Netflix** and we are very satisfied concerning our active international distribution', concluded **Tuzun**.



Aysegul Tuzun, VP Sales & Marketing



Aslan and Momo



Bradley & Bee

The company expansion focuses on sizing up the studio to a capacity of 100 plus, adapting its content and producing originals for online platforms in both animation and live action. 'Securing partnerships and productions with emerging markets such as Latin America and China as key territories is also a top priority', they say.

Tomavision is currently working on the second season of *Emmy & Gooroo* (2D) and *Bradley & Bee* (3D), among other projects in development with the US and France for terrestrial TV and online platforms. 'Co-production and co-development are key factors in securing the required funds and ensuring a well-executed IP', comment the executives, who are studying various options to enter the educational market by developing and implementing International Training Centers aimed at different key market segments in the animation industry. 'We are also consolidating our efforts to respond to the growing demand to provide affordable premium service work for animation and live action integration', complete **Marro** and **Nothman**.

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Ibero-American Animation Quirino Awards 2019

The second edition of The Quirino Awards is being held in Santa Cruz de Tenerife, Spain, on April 4-6. With Cabildo de Tenerife as its main sponsor through the Tenerife Film Commission, the event reflects the determined commitment that is being made for the animation for years on the island.

This commitment is also materialized in concrete actions to support the flourishing local industry, attendance to the main international markets and the promotion of the brand "Tenerife Isla Cartoon", specific for this sector.

The initiative also count on the sponsorship of ICEX Spain Trade and Investment, Town Hall of Santa Cruz de Tenerife and Tenerife Espacio de las Artes (TEA), Iberia Express, HP and Tangram Solutions; the collaboration of ICAA, AECID, Ibermedia Program, Fundación Cultural Hispano Brasileña, Brazil Embassy, Auditorium of Tenerife, University of La Laguna and RTVE; and the support of DIBOOS, SAVE, Pixelat!, 3D Wire, Ventana Sur Animation!, La Liga de la Animación Iberoamericana, Tenerife

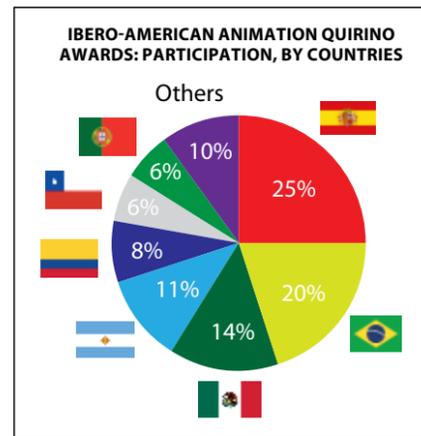


The announcement of Quirino nominees: ICAA general director, Beatriz Navas Valdés; Silvia Barraclough, ICEX, Spain Trade and Investment's Head of Video Games, Animation & VR Sector; Elena Vilardell, Technical and Executive Secretary of the Ibermedia Program; Alberto Bernabé, VP of Cabildo de Tenerife and Tourism, Internationalization and Exterior Action Counselor; Antonio Pérez-Hernández Torra, Casa de America General Director; Carlos Biern, DIBOOS President; and Jose Luis Farias, Quirino Awards Coordinator; besides representatives of the Brazil, Chile, Colombia, Mexico and Portugal embassies

Moda, Annecy Festival, and Polytechnique University of Valencia.

The most important animation associations of Ibero-America are also supporting and participating at the event: **Asociación de Productores de Animación de Córdoba (APA)**; Argentinian Cluster of Animation & VFX Animar Cluster; **Associação Brasileira de Cinema de Animação (ABCA)**; **Animachi Chile**; **Grupo de Empresarios de Animación de Colombia (GEMA)**; **Gremio de Animadores de Ecuador**; **Asociación de Creativos Digitales de México (ACDMX)**; **Perú Animación** and **Casa da Animação of Portugal.**

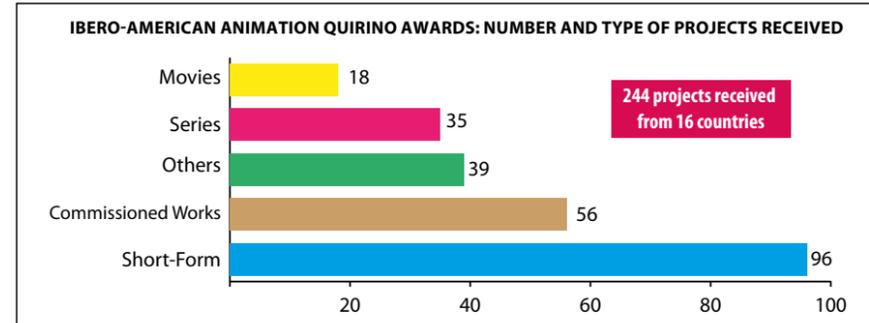
Jose Luis Farias, Quirino Awards Coordinator, comments: "The Awards are born out of the necessity of recognizing the talent of the Ibero-American animation



industry, generating links and networks between both sides of the ocean. They reflect the determined commitment that is being made for the animation for years on the island. The initiative come from the industry itself, there are many people in Latin America who have made it possible for this shared dream to become a reality. The work that is being done from the associations is incredible and see how all we are all paddling in the same direction is inspiring'.

The Award

In 2018, the Mexican feature film *Ana and Bruno* by **Carlos Carrera**, the series *The Tiniest Man in the World* by the Argentine **Juan**



Pablo Zaramella and the Spanish short film *Decorado* by **Alberto Vázquez** were the works recognized in the main categories.

For the 2019 edition, which is being held this April 6, the Organization of the Awards have announced the finalist works in the nine categories of its second edition. All in all, the organizers received 244 works from 16 countries, but only 25 works from seven countries from the region are aiming for the statuettes.

Productions from Argentina, Brazil, Chile, Colombia, Mexico, Portugal and Spain will opt for the Quirino Awards in the nine categories of a selection that reflects the international projection of Ibero-American animation and that counts with a wide representation of works oriented to a young and adult audience.

The Spanish animation received 13 nominations while Brazil presents seven finalists, followed by Colombia (5), Argentina (4), Chile (4), Portugal (3) and Mexico (1). The Spanish short film *La noria* is the one with more nominations (3), followed closely by the Chilean series *Paper port 2nd season - The Lives of Others* and the Colombian feature film *Tropical Virus*, with two nominations each.

The selection has been made by an international jury integrated by the director and script-writer **Alé Abreu**, the Pixar character art director **Deanna Marsigliese**, the producer **Gustavo Ferrada**, the **Sola Media** sales director **Barbie Heusinger** and the **Xilam Animation** head of development **Marie-Laurence Turpin**.

The four feature films that go for the Quirino Award are: the Spanish *Another Day of Life* and *Buñuel in the Labyrinth of the Turtles*; the Brazilian *Tito and the Birds* and the Colombian *Tropical Virus*. For its part, the finalist series are the Chilean *Petit* and the second season of *Paper Port - The Lives of Others*

(the first season was finalist for the Quirino Awards 2018) and the Brazilian *Jorel's Brother - Be Broccoli!*.

In the short film category, the candidates are: the Spanish *La noria* and *Mum's the Word* and the Brazilian *Guaxuma*. For its part, in the school short films category, the finalists are the Portuguese *The Hat*, the Mexican *Reverie* and the Spanish *Patchwork*. In addition, other 16 works opt to the Quirino Award in the innovative works, commissioned films, visual development, animation design and sound design and original music categories.

The Co-production Forum

The organizer keep promoting the Co-production and Business Forum, taking place the previous days of the Award Ceremony. It is aimed to Ibero-American, or with an interest in this region, companies, production companies or TV channels, and congregates professionals from the region in B2B meetings, round tables and conferences in which the state of the industry in the different territories will be discussed.

This year the forum has, as a novelty, the participation and sponsorship of **ICEX Spain Trade and Investment and Animation From Spain**. Among the first participants of the co-production forum are **Discovery Kids, Cartoon Network, RTP, RTVE, CLAN Internacional, Sola Media, Indie Sales, PlayKids, Cake Entertainment, Dandeloo, Autour de Minuit, Xilam Animation and Ikki Films**; as well as representatives of the associations **DIBOOS, GEMA Colombia, Animar Cluster** and **ABCA**, among others. Last year, around 350 meetings were made, and professionals from 20 countries participated.



The Spanish short film *La noria* (Nightwheel Pictures) is the one with more nominations (three), followed closely by the Chilean series *Paper port 2nd season - The Lives of Others* (Zumbástico Studios, Globo, Señal Colombia, Pakapaka) and the Colombian feature film *Tropical Virus* (Timbo Estudio), with two nominations each

2019 Quirino Award Finalists, by categories

Best Ibero-American Animation Feature Film

- *Another Day of Life*, directed by Raúl de la Fuente & Damian Nenow. Produced by Platige Films y Kanaki Films in co-production with Walking The Dog, Wüste Film, Animationsfabrik, Puppetworks Animation Studio (Spain, co-production with Poland, Belgium, Germany)
- *Buñuel in the Labyrinth of the Turtles*, directed by Salvador Simó. Produced by Sygnatia Films, The Glow, Submarine B.V., Hampa Animation Studio, Telemadrid, TV Aragón (Spain, co-production with Netherlands)
- *Tito and the Birds*, directed by Gustavo Steinberg, Gabriel Bitar & André Catoto. Produced by Bits Filmes (Brazil)
- *Tropical Virus*, directed by Santiago Caicedo and based on the graphic novel of Powerpaola. Produced by Timbo Estudio (Colombia)

Best Ibero-American Animation Series

- *Jorel's Brother - Be Broccoli!*, directed by Juliano Enrico. Produced by Copa Studio (Brazil)
- *Petit*, directed by Bernardita Ojeda Salas. Based on the work of Isol. Produced by Pájaro, in co-production with Pakapaka, Non Stop and Señal Colombia (Chile, co-production with Argentina, Colombia)
- *Paper Port Season 2 - The Lives of Others*, directed by Alvaro Ceppi. Produced by Zumbástico Studios, Globo, Señal Colombia, Pakapaka (Chile, co-production with Brazil, Colombia, Argentina)

Best Ibero-American Animation Short Film

- *Guaxuma*, directed by Nara Normande. Produced by Vilarejo Filmes, Les Valseurs (Brazil, co-production with France)
- *La noria*, directed by Carlos Baena, and produced by Nightwheel Pictures (Spain)
- *Mum's the Word*, directed by Khri Cembe. Produced by UniKo, Autour de Minuit (Spain, co-production with France)

Best Ibero-American Animation School Short Film

- *The Hat*, directed by Alexandra Allen. Instituto Politécnico do Cávado e do Ave (Portugal)
- *Patchwork*, directed by Maria Manero Muro. Universidad Politécnica de Valencia (Spain)
- *Reverie*, directed by Philip Piaget. The Animation Workshop - VIA University College (Mexico, co-production with Denmark)

Best Ibero-American Animation Commissioned Film

- *The Amazing Story of the Man that Could Fly and Didn't Know How*, directed by Manuel Rubio. Produced by Hiru Animation (Spain)
- *Lorenzo Live 2018 Intro*, directed by Manuele Fior & Silly Walks Studio. Produced by Silly Walks Studio (Spain, co-production with Italy)
- *Starting From Zero*, directed by Carlos Salgado. Produced by User T38, DDB (Spain)
- *The Fall - Love Never Let Us Down*, directed by Paulo Garcia. Produced by Zombie Studio (Brazil)

Best Ibero-American Animation Innovative Work

- *Belisario - The Little Big Hero of the Cosmos*, directed by Hernán Moyano. Produced by Planetario Ciudad De La Plata (Argentina)
- *Bring You Home*, directed by Marc Terris & Xavi Terris. Produced by Alike Studio (Spain)
- *Mibats Playroom*, directed by Nathalie Martinez. Produced by Wise Blue Studios (Spain)

Best Visual Development of Ibero-American Animation Work

- *Augur* by Bando À Parte, Zéro De Conduite Productions (Portugal, co-production with France)
- *The Wolf House* by Diluvio, Globo Rojo (Chile)
- *La noria* by Nightwheel Pictures (Spain)

Best Animation Design of Ibero-American Animation Work

- *Lino - An Adventure of Nine Lives*. Produced by Startanima (Brazil)
- *La noria* by Nightwheel Pictures (Spain)
- *Paper Port Season 2 - The Lives of Others*

Best Sound Design and Original Music of Ibero-American Animation Work

- *Black Is Beltza* by Black is Beltza A.I.E. Talka Records, Set Mágic Audiovisual (Spain)
- *Between Shadows* by Anmais, co-production with Vivement Lundii. Um Segundo Filmes (Portugal, co-production with France)
- *Tropical Virus* by Timbo Estudio (Colombia)