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OCTOBER/NOVEMBER 2022

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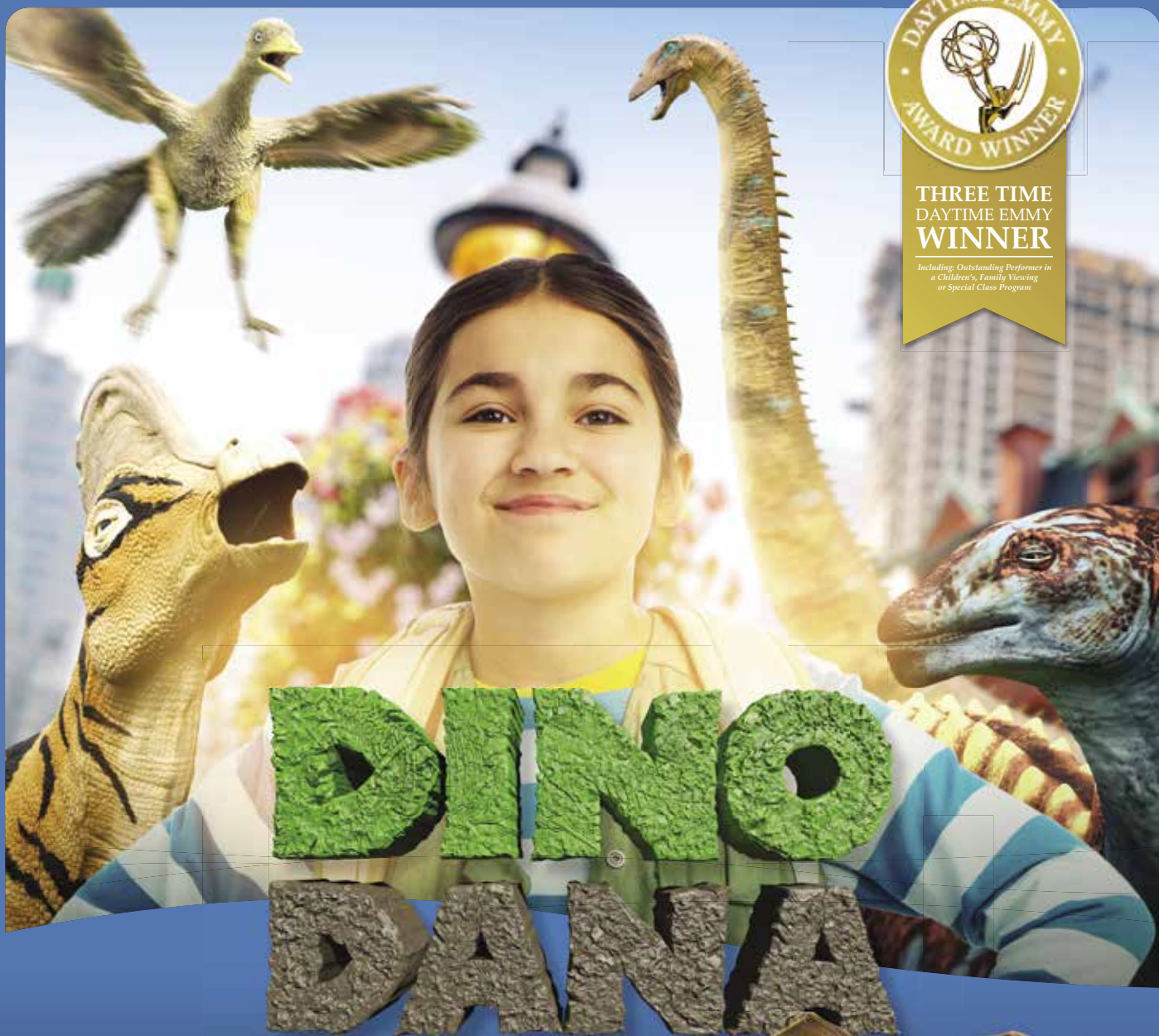
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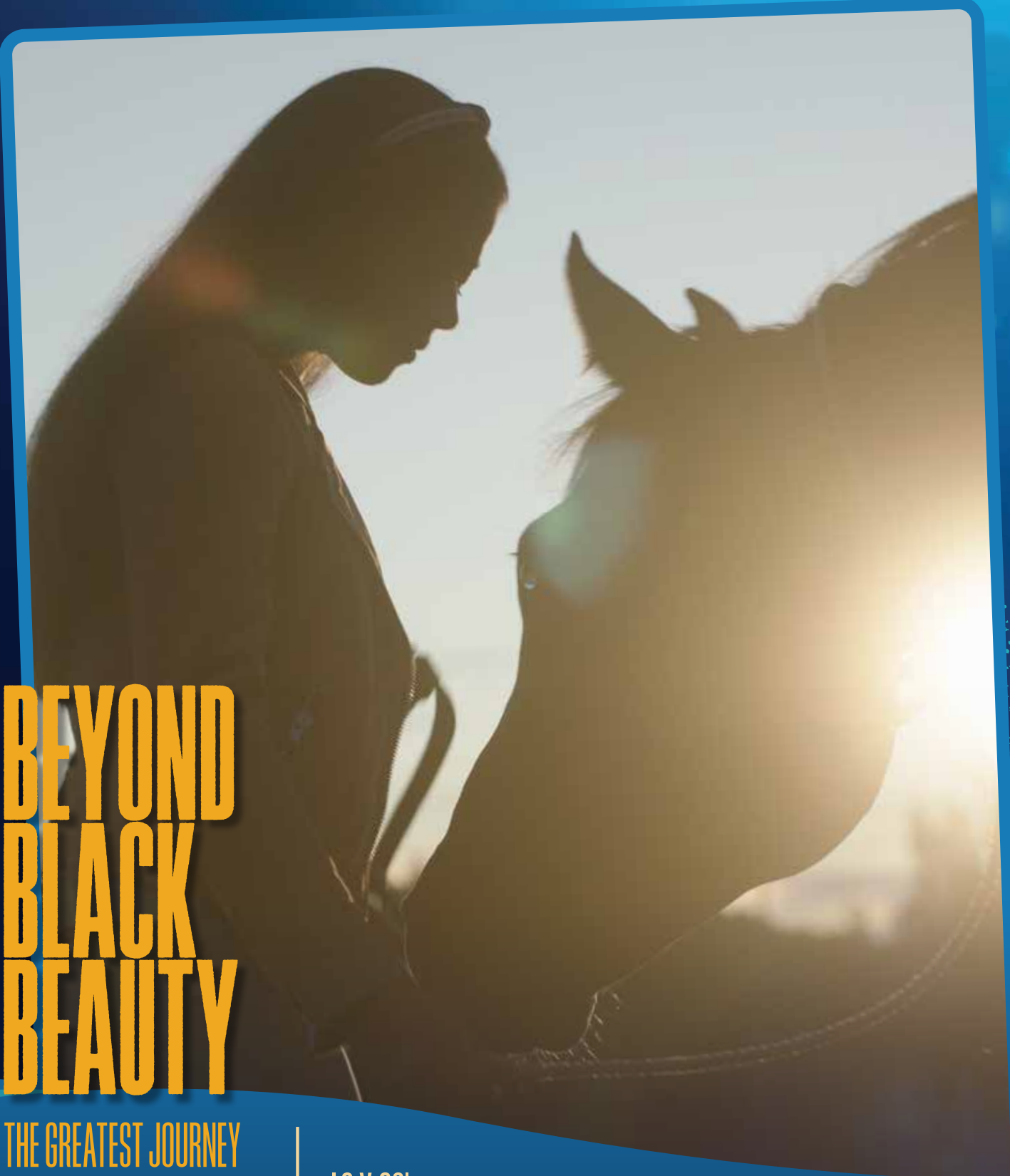
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**SINKING SHIP
ENTERTAINMENT**

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OUR SOLD COVER sports an ad for *Living with Dad* from Mediatoon Distribution, while our editorial cover features Squarefish's 2D/CG-animated adaptation of French graphic novel series *Mekka Nikki*.

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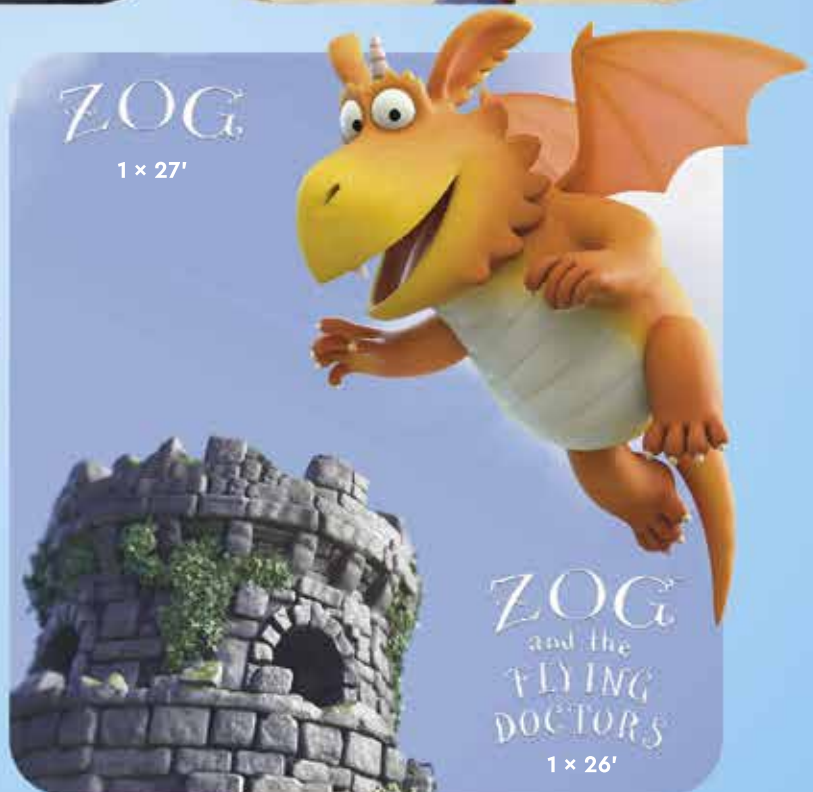
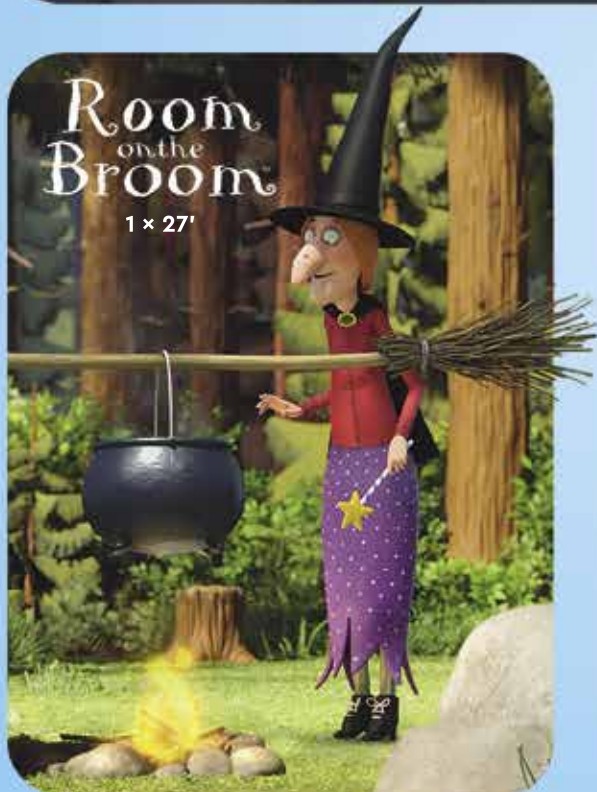


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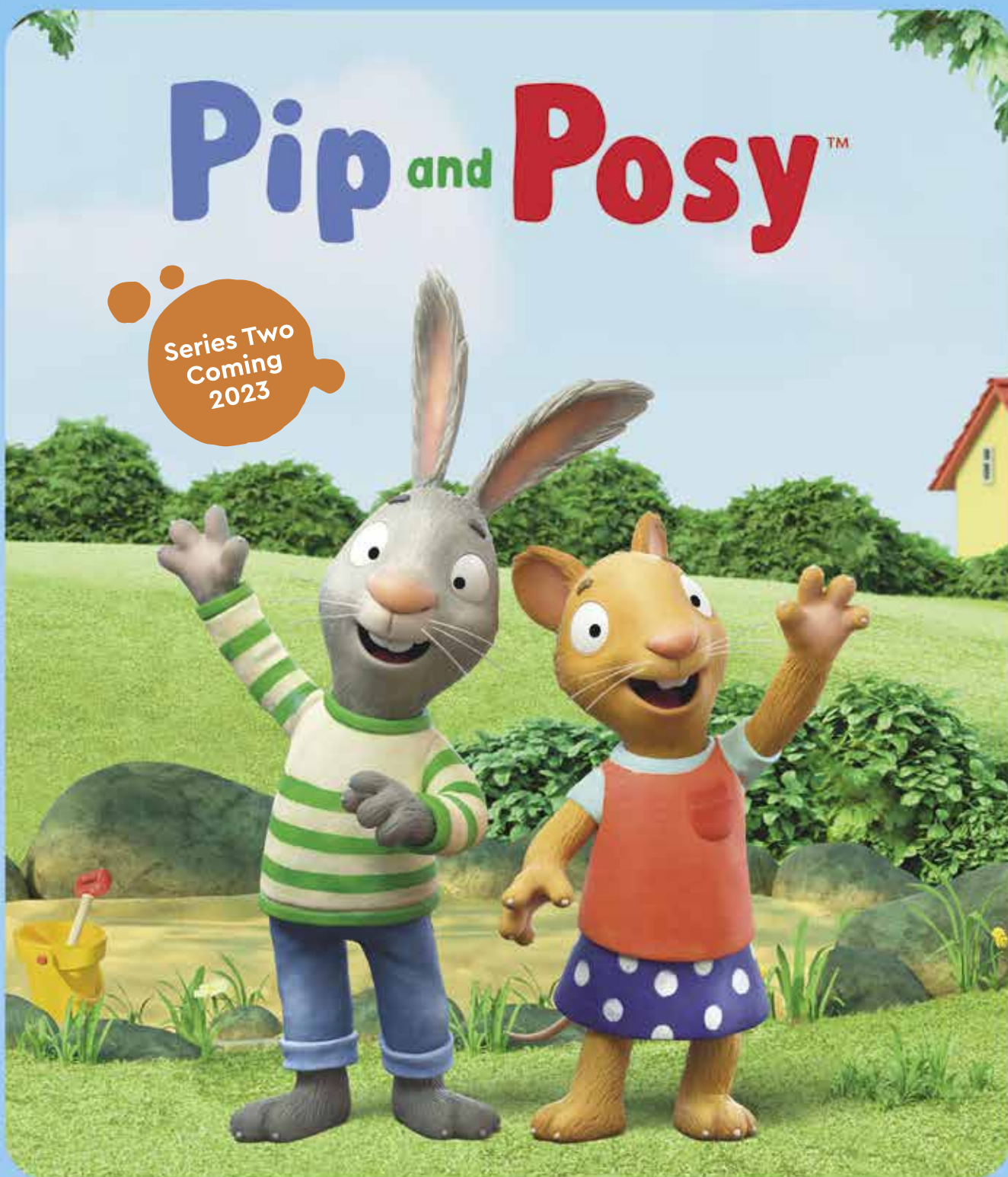
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The magic of IRL

By the time this issue comes out, many of us will have been back to our “old” routines for a while now, working in the office a few days a week, and traveling for markets and events. For some, this has meant a bout (or two) of COVID—a reality check amidst the surge of excitement about getting back in the game. But by most accounts, the risk has been worth the rewards of being out among friends, colleagues and industry contacts, attending the meetings and cocktail parties that make this business tick.

Meanwhile, on the home front for many companies, work routines have been permanently altered, with remote or hybrid structures established as the new normal. Here at *Kidscreen*, our parent company, Brunico Communications, has permanently switched to a hybrid model with the staff split into two groups, each of which comes into the office two days a week.

For extroverts like me, it has been a big adjustment. I now come in most days anyway, because I like people, I like being around them, and I enjoy the energy of in-person team sessions. Teamwork really does make the dream work. When we all get together to hash out content, that’s when the magic happens. One idea comes up, then another, then another, and before we know it, we have the shape of a magazine.

The smallest, most offhand comments can spark the best conversations, and often we realize that we’re all thinking along the same lines. That’s how this issue’s feature section came together—as we returned from Ancestry and other spring events, we discovered that anime had come up in nearly every meeting. So with Features & Special Projects Editor Jeremy Dickson leading the charge, we broke it down, divvied it up, and got it done. I think you’ll really enjoy where the brainstorming took us. Everyone contributed to the ideation and execution, and you’ll see the personalities, interests and expertise of all of *Kidscreen*’s writers shining through.

Other times, a seemingly routine idea can morph into something unexpected. In this issue’s Screen section, Sadhana Bharanidharan turned a conversation about a handful of new kids cooking shows into a deep-dive into the world of tiny food and ’90s cell phone accessories. And Andrea Hernandez sussed out a German SVOD’s ambition to restore and preserve the country’s classic children’s TV series for new generations to access and enjoy. Ryan Tuchow was inspired to contact yoga queen Jamie Amor of Cosmic Kids Yoga and others to discuss the benefits of personalized messaging platform Cameo. And there’s even a totally awesome picture of someone getting eaten by a dinosaur in a VERY unexpected place. (Thanks, Cole Watson!) I’ll let you flip through and discover that one on your own.

Thanks to the polishing of interim Associate Editor Janet Lees and the incredible design vision of Art Director Taylee Buttigieg, the stories draw you in visually, and keep you engaged.

We are always open to out-there ideas, interesting insights and market conversations that inspire us to think, especially when they are shared in person at one of the many exciting locales where we have the privilege of gathering with our industry peers—including Cannes, where I hope you’ll be reading this issue!

—Katie Bailey

kidscreen

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1 On stream

We've been saying that streaming is coming full circle for years, but it looks like now it's really happening. Not only are SVODs introducing AVOD tiers in order to bring down the cost of subscriptions for consumers, but FAST channels (internet-delivered linear TV channels with dynamically inserted ads) are seeing rapid growth, with a recent *Variety* report indicating there are now 1,400 such channels in the US. Another marker of entertainment-industry maturity is consolidation—the big players are starting to merge disparate services into single offerings, including Discovery/HBO Max and Paramount/Showtime, in the same way networks once collected individual cable channels and distributors sold them in bundles. For children's programming, the rise of FAST and lower-priced SVODs is an important evolution, extending the reach of new and library programming to more audiences across a wider demographic and socio-economic spectrum. It keeps content that's made for linear consumption on linear-style services, instead of bite-size or illegal versions on social media networks. And hopefully, it keeps this new OTT landscape viable for all parties, with scale providing the financial scope for programmers to keep investing in original content.

THE LIST

10 things on our radar this month



6

Annecy looks east

Indian film commissioner Ravinder Bhakar revealed over the summer that talks are underway to bring the famed French animation fest to India, with a localized edition highlighting the country's creative labor force, incentives and co-pro potential. We like it!



7

Accessibility now

From Netflix's partnership with RespectAbility that gives job experience to creatives with disabilities, to a new licensed adaptive clothing range from Unhidden, D&I initiatives are on the rise. And that's a good thing in a world where one in five individuals lives with a disability.



2 TCG battles

Breaking into collectibles is tough—you have to create a need and stoke it constantly. But two major players are giving it a go with Lorcana, a new trading card game (TCG) from Disney and Ravensburger featuring iconic Disney characters. Can they catch kids early, build loyalty and steal a little market share from Pokémon and Wizards of the Coast?



3 Shopping redux

Feedback from parents inspired Toys “R” Us Asia to explore a new layout in Hong Kong that sees brands take a back seat. The retailer implemented store sections based on childhood development stages and skills, such as STEM, role-play/dress-up, infant and preschool. This could be a boon to smaller brands, but will bigger players lose the visual impact of branded aisles?



4 Shaping the future

Amidst a global labor shortage, streamers and studios are increasingly investing in mentorship programs to nurture emerging talent. Netflix, for one, recently announced its New Grad initiative, which gives participants applied work experience, technical education, networking opportunities and mentorship for roles in software engineering, creative production and data insights.



5 Let's get vertical

By the time kids hit tweenhood, TikTok is already on its way to being their favorite platform, according to KidsKnowBest. To match kids content to their preferred platforms, companies such as Iervolino & Lady Bacardi Entertainment and Giggiebug are flipping the script (literally), making vertical content that's made for social media. Time will tell if the approach engages kids or falls flat.



8

Funking up collectibles

Funko is, by its nature, a collectibles brand. But it's upping the ante lately by breaking into new areas. Recently announced ventures include a retail store with a big-name rapper, a cross-country road trip to Comic-Con with con-exclusives in its trunk, and limited-edition NFTs.



9

Hip-hop kids

Rappers Snoop Dogg and Taboo are the latest big names to explore the preschool market. Snoop's *Doggystyle—Kids Songs & Nursery Rhymes* YouTube series and Taboo's Indigenous-inspired toon with Gaumont Film Company both point to legit efforts in the hip-hop space.



10

Dinos: not extinct?

It seems that dinosaurs are alive and well in the kids content industry, and they're getting zanier by the day. Zinkia's *Yanco, Dina and the Dinosaurs* are treasure hunters, *Vegeosaurs* (Studio 100 Media) are food-shaped, and *Turbozaurs* (Tale Wind) are mechanized. What's next?

THE HOOKUP

Kidscreen checks in with the market's most prolific buyers of Spanish-language content for kids. For more of this type of intel, check out our *Global Pitch Guide* at kidscreen.com.



HITN

Erika Vogt-Lowell
Director of programming and acquisitions

Looking for: Fresh and inspired content appealing to both preschoolers and parents. We select concepts with a lesson or insight related to social-emotional learning, body activity/movement, understanding the world, and creativity. And we look for reliable and age-appropriate content.

Style: 2D and 3D animation, but we have also been discussing the inclusion of live-action content.

Demographic: Preschoolers (ages two to six)

Format: No restrictions on the number of episodes or their length.

Buying strategy: We're primarily looking for completed content dubbed into neutral Spanish. In the future, we will be looking to co-produce and consider projects in different stages of development.

Recently acquired series: *Little Malabar, Zibilla, Sunny Bunnies, Petit, Fox-Badger Family, Will, Mya Go*



Canela Media

Maggie Salas-Amaro
Director of kids content

Looking for: All genres, but mainly entertainment that educates and encourages co-viewing by the whole family. We also look for shows that talk about friendship, family, problem-solving and adventures.

Style: All types, but mostly live action to appeal to our older demos.

Demographic: Our channel is aimed at children of all ages. For live action, we target kids ages seven to nine and 10 to 12.

Format: We prefer episodes that are 11 to 22 minutes long, but also shorter lengths for preschool series.

Buying strategy: We look for concepts that we can develop as our own IPs, but we also want to co-produce and extend brands with licensing and merchandising opportunities.

Recently acquired series: *Angelina Ballerina, Growing Up Creepie, Barney, Super Genios, MeteoHeroes, Animal FanPedia, Garfield, Peanuts*. We have also acquired content based on popular Mattel brands such as Hot Wheels, Barbie, American Girl and Max Steel.



RTVE

Eduardo Calvo
Kids licensing and content sales

Looking for: New types of children's programming, such as live action.

Style: We don't want to limit ourselves—we are open to all styles.

Demographic: Our current target audience is four- to eight-year-olds, but we are also looking for series that target older viewers.

Format: Open to any number of episodes/seasons and episode lengths.

Buying strategy: Acquisitions are led by Laura Montero, and we issue a callout for co-productions once a year in the first quarter, and a committee chooses five to six projects to develop.

Recently acquired series: *CoComelon, Milo y los Pitufos, Petronix Defenders*

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Moonbug's metamorphosis

The fast-growing prodco is aging up, expanding out, and looking to the next phase.

BY: RYAN TUCHOW

Moonbug is growing up. Since being bought by Candle Media last year and igniting its own M&A strategy, the company is moving forward by focusing on digital-first IPs, acquiring the companies that own them, and investing in an original content pipeline, says managing director Andy Yeatman.

The goal is to turn popular YouTube brands into 365-degree franchises. Moonbug successfully tested and fine-tuned this strategy with preschool brands like CoComelon and Blippi. And now, armed with investment

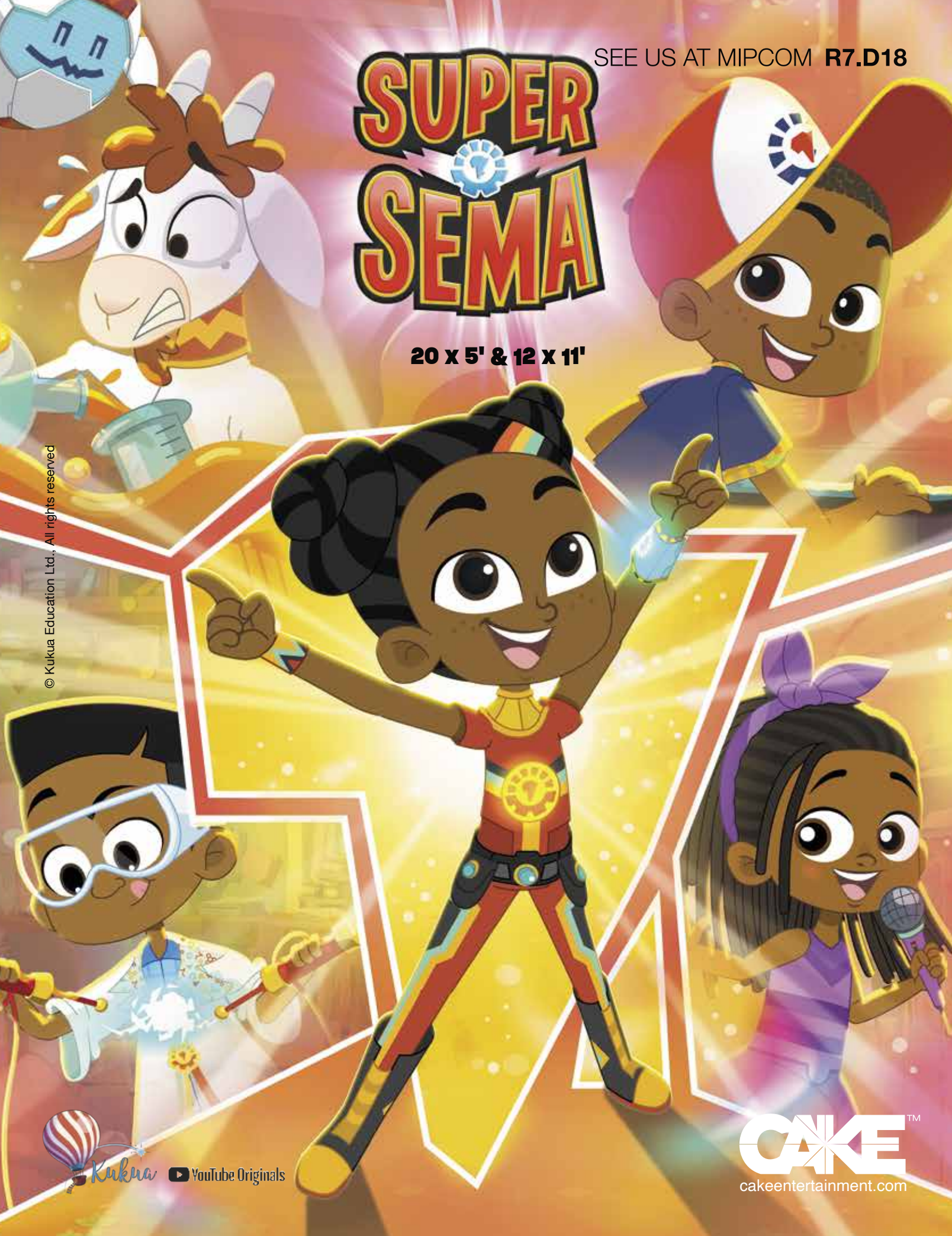


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and direction from Candle—which is owned by former Disney execs Kevin Mayer and Tom Staggs—it has marching orders to “think bigger.”

In this new phase of growth, Yeatman says the company will focus on three pillars: geography, new demos and gaming. It will also expand its international focus to include Europe, Asia and Latin America.

Moonbug has done very well dubbing its English-language nursery rhymes into other dialects. But it’s now moving towards creating original content featuring songs and rhymes from cultures around the world in order to increase its relevance with international audiences. To that end, Spanish- and English-language video *Los Pollitos Dicen Dance* launched in August on YouTube, and the company’s first international series is currently in production in Brazil using local talent. Moonbug also hired former Disney VP Francesca Romana Giansin in May to lead licensing in EMEA, Australia and New Zealand.

On the content side of its business, Moonbug’s recent acquisition of Singapore-based studio One Animation gives it a greater foothold in Asia, Yeatman says. And that ties into another of the company’s goals—to expand its core target demo. Moonbug has had category-defining success in preschool, but now it’s on a mission to reach kids in the bridge demo of five to eight. And that’s where *OddBods* comes in.

The studio’s flagship series, *OddBods* (pictured), is a non-dialogue comedy for



five to eights that has aired in more than 180 countries and has 32 million YouTube subscribers. The format travels easily across borders, languages and cultures—a good example of the type of content Moonbug will be focusing on moving forward.

The company also has its eye on gaming. While its previous focus on younger

children had historically made it cautious of video games, Yeatman sees the rising popularity of Roblox as having high potential for Moonbug to discover new IPs and expand its own properties.

“The next frontier for us is seeing families interact with our shows as they come off the screen.” **K**

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Kixi's recent acquisitions include *The Little Vampire*, an animated series from Munich's Leonine Studios

Kixing it up a notch

German kids SVOD Kixi finds the right formula for success with nostalgic content and well-established hits.

BY: ANDREA HERNANDEZ

Although it's only available domestically so far, Germany's Kixi has been making a splash in the global streaming scene lately with its scope and rapid growth.

The SVOD launched in 2011 but really hit its stride over the past three years, inking deals with more than a dozen new content partners, quadrupling its annual revenue and tripling its subscriber base, says director of acquisitions and programming Sascha Stradtman.

Targeting kids ages three to 13, Kixi's offering now includes 1,000 titles that span live-action and animated TV series, films and factual programming. It is an avid buyer of both international and local content, featuring a good mix of German-language shows and dubbed programming from other regions.

Thanks to a pandemic-fueled viewing surge and cord-cutting in general, the platform is now considered the go-to source for library kids programming in Germany. "Before Kixi existed, parents had to buy DVDs or use VHS recordings of their kids' favorite movies and series if they wanted to watch content that wasn't on linear TV," says Stradtman,

adding that this market gap is what inspired Kixi to launch in the first place.

The streamer focuses on children's content with educational value for its target demo of six- to nine-year-olds, and it prefers episodes that are 11 minutes or longer.

Acquisitions in 2022 include *Odd Squad* (Sinking Ship); *Babar*, *Franklin and Max & Ruby* (Nelvana); and homegrown hits *Coconut the Little Dragon 2: Into the Jungle* and *The Little Vampire* from Munich's Leonine Studios.

On the film side of things, German titles such as *Annaliese & Anton*, *Emil and the Detectives*, *Charlie & Louise—The Double Lotto*, *The Flying Classroom* and *The Wild Chicks* from Geiseltal's Bavaria Media have all joined the lineup this year.

Going forward, Stradtman also wants to add more classic German library programming to Kixi's mix, noting that while the restoration of older titles is expensive, it could set Kixi apart as a steward of German culture. "These programs are not just a business—they are a cultural heritage," he says.

Kixi is available to German consumers via app, website, cable provider Telekom Deutschland and Amazon Prime. **K**

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Pinna is all ears

The audio platform's new voice-activated kids series *Yes No Audio* is taking podcasting in an interactive direction.

BY: JEREMY DICKSON

Kids audio streaming service Pinna is breaking new ground in the podcasting space after launching what it calls the first-ever voice-activated interactive podcast series.

Yes No Audio targets kids ages seven to 12 and consists of three escape room-based adventures (pictured)—Escape the Haunted House, Escape the Sinking Ship and Escape the Marshmallow Dream Forest. The original series launched in June exclusively on Pinna and is available with a full access plan on all iOS and Android devices and via desktop browsers.

In each episode, listeners must escape a high-stakes scenario in five minutes by answering yes or no to a series of questions posed by a host character.

Pinna has launched numerous call-and-response interactive experiences, including *A to Z Mysteries Clue Club*, *ExtraBLURT* and *Hey Story Go*. But *Yes No Audio* is the company's first voice-recognition series where the Pinna app actually listens for answers and responds by altering the storyline, says Amy

Kraft, senior director of development and children's programming.

"Active listening experiences have always been a part of Pinna's DNA," says Kraft. "But with *Yes No Audio*, we've pushed the envelope further on how to get kids interacting."

Kraft, senior production manager Ash Beecher and then-executive producer Anne Richards came up with the initial idea for the series and developed it with senior director of product Hilary Glazer and Canadian interactive agency Curious Media (*Cat in the Hat Builds That*), which built out the voice-recognition tech for *Yes No Audio* in Pinna's app.

After prototyping and kid-testing the series, Richards took a new job in January 2022 as head of audiyo-yo, the podcast division of Boston-based animation and service studio FableVision. But she kept the collaboration with Pinna going, creating and writing the first three titles in *Yes No Audio*, which were produced by audiyo-yo under her leadership. She says her greatest challenge was writing

the series. "Figuring out how to make the yes/no questions compelling, and ensuring that all of the story branches were laid out carefully at the start, were the biggest tests for me," she says.

For Kraft, the biggest challenge was developing the underlying technology and future-proofing it for more voice-recognition titles. "We have some plans for later this year that will be radically different from *Yes No Audio* in terms of interactive storytelling," she says. "But Pinna will also have more *Yes No Audio* titles out later this year that we're making with other creators and internally."

Looking to the future, Kraft says Pinna has a big advantage over others in the space because it operates its own platform. "Having our own app provides us with a playground for developing different formats like *Yes No Audio* or three-minute shows for our Surprise Box feature," she says.

"I'm excited for all aspects of kids podcasting going forward." **K**

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BIG GIG

Mary Coleman

THE BIG GIG: Chief creative officer of Locksmith Animation

PREVIOUSLY: Head of creative development at Pixar

BUILDING A LEGACY: Coleman joined Pixar in 1999, and was instrumental in the creation of beloved classics like *Finding Nemo*, *The Incredibles*, *Ratatouille*, *WALL-E* and *Up*. “A big part of my role was helping directors find and hone their vision for their movies, and then being someone who could remind them of that north star well into production,” she says.

POWER OF CHARACTER: Coleman and her kids were impressed with 2021’s *Ron’s Gone Wrong*, Locksmith’s first feature film. The nuanced storytelling won over her 10-year-old, who observed that the movie didn’t vilify technology, but simply challenged how it’s used. “She wouldn’t have grasped that unless she was first fully engaged by the characters,” Coleman notes. “I only want to tell character-driven stories, and I could see that was Locksmith’s highest priority, too.”

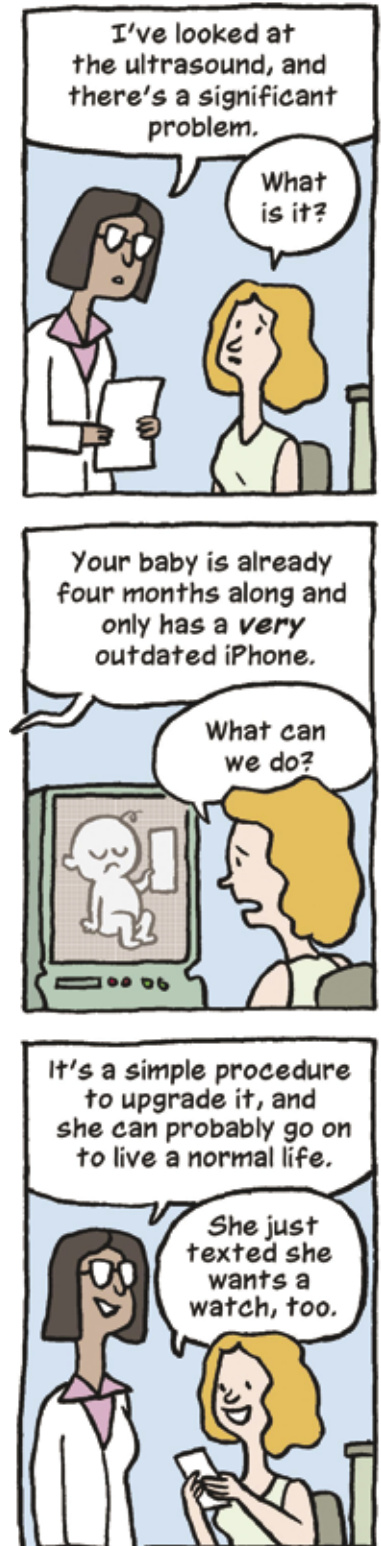
CHAMPIONING WOMEN: Coleman co-founded Pixar mentoring programs The Story Artistas, Animation Artistas and Art Artistas to empower female creatives at the company. “When Pixar recruited me, I was lucky to work with some of the most talented men in animation, but still wished there were women leaders on the creative side who I could learn from,” she says. “I was the first woman on the Brain Trust (directors and creative leads who help elevate stories from good to great), and I was relieved when we gradually started having more women writers, directors and creative execs take their place at the table.”

NEW-AGE AUDIENCES: Studios must keep up with today’s increasingly sophisticated kids, says Coleman. In a recent audience screening for Locksmith’s upcoming film *That Christmas*, any concerns about young viewers not following complex story threads were quickly quelled. “Several adults said they found [the film] funny and touching, but that their kids wouldn’t understand all of it. We were laughing because we had just come from the kids room, where they not only understood the story, but picked up on things their parents had missed.”

—Sadhana Bharanidharan

Know your audience

BY: JIM BENTON



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A tiny chef with huge potential, Cheffy has 3.4 million followers on TikTok and now stars in his own Nickelodeon series

Snackable content

When it comes to food-based programming for kids, there seems to be a growing appetite for smallification. *Kidscreen* speaks to execs and an expert to uncover why this recipe works so well.

BY: SADHANA BHARANIDHARAN

It's said that too many cooks spoil the broth. But what if the cooks are small, and so are the ingredients?

Broadcasters and producers are betting on tiny food as a winning formula for young viewers, with new shows such as *The Big Tiny Food Face-Off* and *The Tiny Chef Show* scaling the kids cooking trend down to micro size.

Face-Off, from Sony Pictures Television's B17 Entertainment, launched on BuzzFeed's

Tasty YouTube channel in July, and quickly attracted more than 61,000 subscribers. Over the course of six 20-minute episodes, tween and teen contestants created miniature-sized dishes, competing to see who could pack the most flavor into them.

Daniel Haack, kids & family creative lead at YouTube Original Content, says it's inspirational for young viewers to see scaled-down cooking in action.

"A lot of hobbies require expensive tools and materials, but with tiny food, you're typically only using small amounts of ingredients," he says. "So a kid may be able to play around more freely, and have some trial-and-error, without worrying as much about impacting a family's food budget."

The tiny approach also adds tension to the competition format, Haack notes. On one hand, the judges (creators/hosts Matt Stonie



and Inga Lam) have to carefully base their decisions on small bites. The kids, meanwhile, also have to be significantly more precise with their processes, such as measurements and heating.

"Tiny food brings an element of fantasy and play to cooking, while also requiring so much creativity and inventiveness," says Haack. "It allows kids to express themselves, but also to experiment and learn how to problem-solve."

Laura Miller, Shibusawa professor of Japanese Studies at the University of Missouri—St. Louis, theorizes that tiny food likely has its roots in the Kawaii aesthetic of cuteness that originated among women and girls in Japan. She also notes that traditional Japanese arts such as Bonsai and Netsuke are similarly shaped around a love of miniature things.

In fact, Kawaii played a prominent role in *Face-Off*, serving as the theme for one of its episodes. "We really wanted to celebrate the long history of tiny food cooking and give viewers some awareness of its cultural context," Haack notes.

Mapping out other possible origins of tiny food, Miller also points to the art of Dekoden—decorating accessories that styled up cellphones in the '90s. Food-based ornaments like tiny cakes and candies were so visually appealing that they became a specialized genre of Dekoden, she notes.

People eventually began creating these accessories themselves using polymer clay and resin. And eventually, the idea of making edible versions of tiny food became appealing in order to demonstrate both expertise and creativity without giving up functionality or cuteness, Miller explains.

From there, it stands to reason that the internet has played a major role in boosting mini-food's popularity and accessibility. "As the miniature fake and edible food fad escalated, Japanese fans posted videos and photographs to social media," says Miller. This went on to capture the attention of companies in the West.

While tiny food has been around for a long time, platforms like YouTube have really helped bring it to a wider audience over the last few years, adds Haack. He notes that kids have found their way to tiny food through a variety of entry points—while some of the young contestants on *Face-Off* got involved through their interest in cooking, others discovered tiny food through a passion for DIY and crafting.

The internet is also where the Tiny Chef brand first gained popularity back in 2018. In a dedicated, eponymous Instagram account and other social channels, pint-sized puppet Tiny Chef (a.k.a. Cheffy) is seen engaging in various activities, from playing his tiny banjo, to baking an apple pie in a bottle cap. Today, Tiny Chef has more than 620,000 followers on Instagram and upwards of 3.4 million followers on TikTok.

The mix of quaint-looking visuals and Cheffy's amusing personality has attracted fans of all ages (including actor Kristen Bell, who is now an executive producer on the Nickelodeon series), setting the stage for a franchise that includes consumer products—and now a major-network TV series.

The Tiny Chef Show premiered on Nick in September, produced by Imagine Kids+Family, Nickelodeon Animation and IP owner Tiny Chef Productions. With TV personality RuPaul as a voice announcer, the series features Cheffy whipping up tiny plant-based dishes, interacting with celebrity guests and learning lessons along the way. (For example, one episode sees him overcome his loss of confidence after breaking his favorite spatula.)

Rachel Larsen, a co-creator and executive producer on the series with Adam Reid and Ozlem Akturk, echoes Haack's emphasis on fantasy as a key element in this nascent genre.

"It's one thing to play with dolls and doll-houses, where everything is plastic. But when you cook tiny, you can actually consume [what you create]," says Larson. "There's something interactive about it—it puts you into that tiny world."

Larsen agrees that the tiny trend owes some of its success to its compatibility with bite-sized video formats (pun intended). "I think social media has done a great job of [giving a platform to] things that didn't necessarily have a home in longer formats," she says.

It's also worth noting that a large-sized effort went into the small-sized sets and props on both projects.

For *The Tiny Chef Show*, production designer Jason Kolowski prepared soundstages inspired by the tree-stump home featured in Cheffy's social media backdrop. The intricately designed sets are equipped with small culinary accessories such as pots, pans, spatulas, jars, plants, a miniature burner and more. Tiny Chef, who is always seen in his signature apron and hat, occasionally also rocks a tiny pair of spectacles.

Meanwhile, in addition to the miniature utensils and furniture featured in *Face-Off*, the winner also receives a tiny golden trophy. And each episode ends with footage of a small hamster enjoying the prepared meals—something that really helped capture the "whimsical" feeling of tiny food cooking, according to Haack.

"Our partners at B17 did a great job in thinking about set design, camera angles and perspective to properly capture the small scale, while still making the show itself feel big and exciting," he says. And that's no small feat. **K**



Going on an IP hunt

To catch a big one, you need to cast a wide net. Here's how three companies are using unique strategies to find or build out digital-first kids entertainment brands.

BY: MARYAM SIDDIQI

We all know that a great idea can come from anywhere, but the scale of content creation today is so vast that determining which ideas have potential for expansion—and which don't—is daunting and complex. *Kidscreen* spoke with three digital-first companies to get a read on their strategies for finding new IPs and monetizing them in as many ways as possible.

The takeaway? Don't just think outside the box—get rid of it.

pocket.watch

Pocket.watch launched with five YouTube creators in 2017 and made a business out of transforming channels and personalities into franchises. Today, it has 30 creators/channels and distributes content to 45 platforms in 80 countries. In June, the company signed on 13 more creators. How does pocket.watch keep its pipeline full? Kerry Tucker, chief marketing and franchise officer, explains.

THE HUNT: Size of audience is no longer the metric it used to be, says Tucker. Today, a YouTube channel is not even a slam-dunk at 100 million followers. What does matter is authenticity.

"It's important that creators come to us with an authentic story, that they really love what they do and do it for a reason—and we can suss that out pretty quickly," she notes. "Kids and family creator management at pocket.watch is a very high-touch business with deep subject matter expertise. From the CEO down, we're always scouting for talent on social channels—who's emerging, who's trending. And we have a 10-person creator management team dedicated to handling everything from scouting, to contract reviews, to day-to-day management."

She adds, "Many of these creators are just families in their living rooms, so it's really just human management as we move them from something very insular into a broader business landscape."

THE ASSESSMENT: Pocket.watch invests in creators across all platforms, including YouTube and TikTok. "The scale and diversity on YouTube is still incredibly strong and provides unique opportunities, specifically related to a creator's library of long-form content," Tucker says.

The company looks at data and demographics, as well as key metrics like engagement and audience penetration globally.

"Franchise value is really interesting because we look to develop franchises from digital-first talent, which is a bit of a differentiation for us. A video library is one of the most important things that we look for because we specialize in transcending the content from YouTube onto other platforms," says Tucker. "The libraries are very important for that business, and give us an immediate secondary revenue stream for these creators."

THE OPPORTUNITY: The final consideration is whitespace. As Tucker explains: "Where are we not playing? We want all of the world's kids to see themselves in our content, and therefore representation really matters. So

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we will forgo scale for representation, if necessary. Gaming is still a massive opportunity that I don't think is going to go away anytime soon. And I've been really interested in what's happening in magic [as a category]—it feels ripe for disruption.”

Pocket.watch's definition of diversity is not limited to demographics, says Tucker, explaining that “it also includes a diversity of perspective, lifestyle and geography.” She cites Hudson's Playground as an example. The YouTube-based IP with over a million subscribers is about a family living on a working farm. “We believe Hudson's Playground can potentially provide the inspiration to disrupt the genre of farming through everything from original content to consumer products.”

Invisible Universe

According to CEO Tricia Biggio, Invisible Universe (IU) considers itself an internet-first animation company that utilizes storytellers, animation studios and community managers to create and distribute content on the platforms that everyone visits most often on their phones—TikTok, Instagram, YouTube and Twitter.

The company has developed mobile-led IPs for kid audiences with celebrities such as Jennifer Aniston and Serena Williams, and it raised US\$12 million this summer to fuel its expansion. While IU's strategy is to partner

with influential creatives or personalities to develop brands, Biggio says it's the process to exploit them that sets it apart.

THE HUNT: At Invisible Universe, the hunt is all about connecting new IPs with the right audiences, and then using those connections to further develop and exploit the IPs.

“There's this incredible whitespace that social media platforms provide to incubate IPs in collaboration—and in near real time—with the very audiences that will later become your consumers,” says Biggio.

“It's more of a collaborative, direct-to-consumer approach, letting an audience tell you what they love about it and what they don't. If you look at some of the broader trends around gaming and where kids are spending their time creating—in the Epic Games ecosystem, in Roblox—that same desire to build and create is going to extend to entertainment.”

When it comes to partnering to develop content, the company looks to all sectors of entertainment, whether it's sports or film. “It's crucial that the partner is genuinely interested in the creative development and willing to promote any franchise expansions, such as books, TV shows or other kinds of licensed products,” says Biggio.

Clydeo, whose TikTok bio is “Dog, Foodie, Cousin, Best Friend of Jennifer

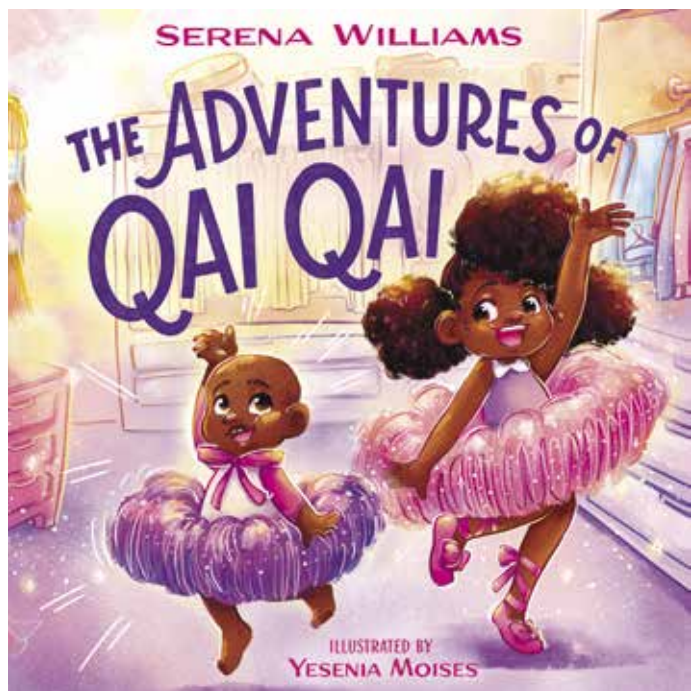
Aniston,” was created in partnership with Aniston (the character is an animated dog based on her own pooch, Clyde). The actor gives input into storylines and licensing opportunities, but isn't involved in the day-to-day creative.

THE ASSESSMENT: The number of people liking, favoriting, sharing and commenting weekly on Invisible Universe's content is in the tens of thousands, according to Biggio. “We get this really organic pickup, and what we're able to do then is start to look for the signs and signals of affinity getting built,” she says.

“We look at engagement—the number of likes or comments over the number of views on that particular post. But then there's also what I consider the signs and signals, things like publishers reaching out, the streamers inquiring about film and TV rights, conversations with toy companies. We're looking for that initial build on social, which spurs the conversations for franchise extensions.”

THE OPPORTUNITY: A big part of Invisible Universe's success stems from the ability to respond to its audience with new animation in a matter of days, notes Biggio.

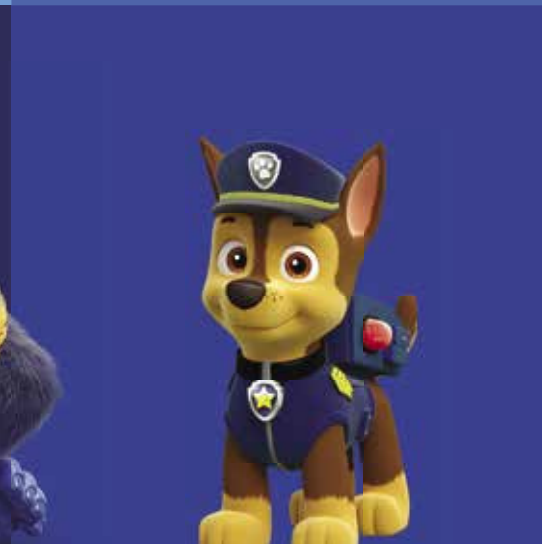
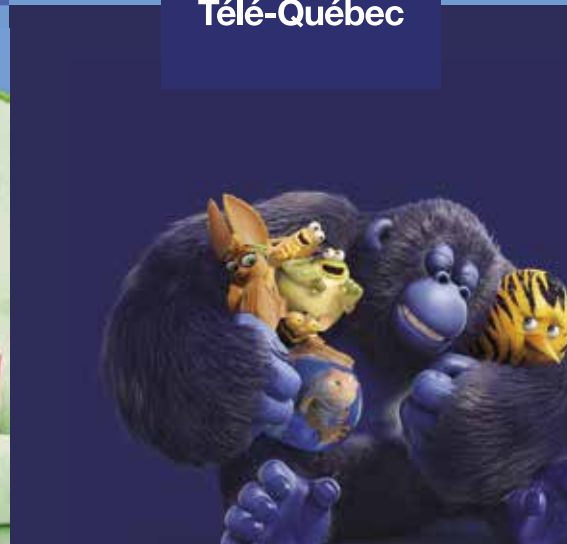
“On a micro level, we can source content ideas in the comments,” she says. “But on a macro level, we're earning the audience's affection for a brand, because we're showing



Invisible Universe works with high-profile personalities to bring kid-friendly ideas to life, including Clydeo (left), based on Jennifer Aniston's canine buddy; and Qai Qai (right), the fictional kid inspired by Serena Williams' daughter



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The creator has to have a REAL COMMUNITY that rallies around them and ADORES THEM.

—Maria Perez-Brown, TIME Studios Kids & Family



The littles is one of the projects on TIME Studios' Web3-based slate of animated series

them that we're always listening, and we're letting them feel like they're part of the process."

However, she adds that there is no one-size-fits-all approach to social, and IU tailors content and community management to each specific platform. For example, content for Qai Qai, a sassy doll, is aimed at an older audience on TikTok, while preschool kids are the target for the YouTube channel Qai Qai's Nursery Rhyme Remixes.

TIME Studios

Established kids entertainment exec Maria Perez-Brown joined TIME's new kids & family division in June 2021 and quickly started looking for new ways to source IPs to make the legacy brand's content stand out, landing on the nascent world of NFTs for source material.

"As a new studio, we needed to make a splash, so we're coming at IP creation and ownership differently," says Perez-Brown. "Our Web3 division, in addition to helping people amplify their brands around NFTs, is also generating NFTs of the covers of *TIME* magazine. Because of that, we have a lot of respect in the industry from the creative community, which happens to be very young. We're getting access to new, innovative voices that are not coming through traditional sources to pitch shows.

THE HUNT: "When I start having conversations with NFT creators, I see that there's a world there—an IP that they've thought about quite deeply—but it's not necessarily reflected in the illustrations that become the basis of their NFTs," notes Perez-Brown. "Their rules are very different from the rules that we all subscribe to in creating content

for children. That whole dynamic of the traditional journey to [develop a] series is inverted, because they're drawing, putting their images out there and taking them directly to the consumers. And the people who buy NFTs become the marketers of that particular IP."

When evaluating creators, Perez-Brown says she and her team look for places where TIME Studios can bring added value to a creative relationship, asking: "How can we look at communities that have very strong, static creatives and use the strength of TIME Studios to help them develop character arcs and storylines that nobody thought were possible?"

THE ASSESSMENT: In a global market, the concept has to have global reach, notes Perez-Brown. "Diversity is also one of our pillars. There are universal stories in all of the shows that we do, but do we have a diverse lens to tell that story through?"

Another priority is to ensure that the creator's fanbase will support this new form of content. "The creator has to have a real community that rallies around them and adores them," she says.

THE CHALLENGE: For TIME Studios, the main challenge is how to cut down the time it takes to produce a traditional television show, says Perez-Brown, adding that the answer to this question is still not clear.

"If we're going to take a new IP and put it through the regular channels of creating a TV show, that's a two-year process, and this community is a little impatient," she says. "They really want to see results right away,

because with NFTs, you're able to come up with an idea and get it to market very quickly. So we are also working with animation houses that understand that speed is an important element of this—speed to market, but not sacrificing quality and remembering that you're going to be there for an audience of kids who are getting content from many different sources."

The studio is learning and adapting to this form of IP-building in real time, adds Perez-Brown, pointing to the company's agreement with Toronto-based Nelvana to develop and produce NFT-based animated series as an example.

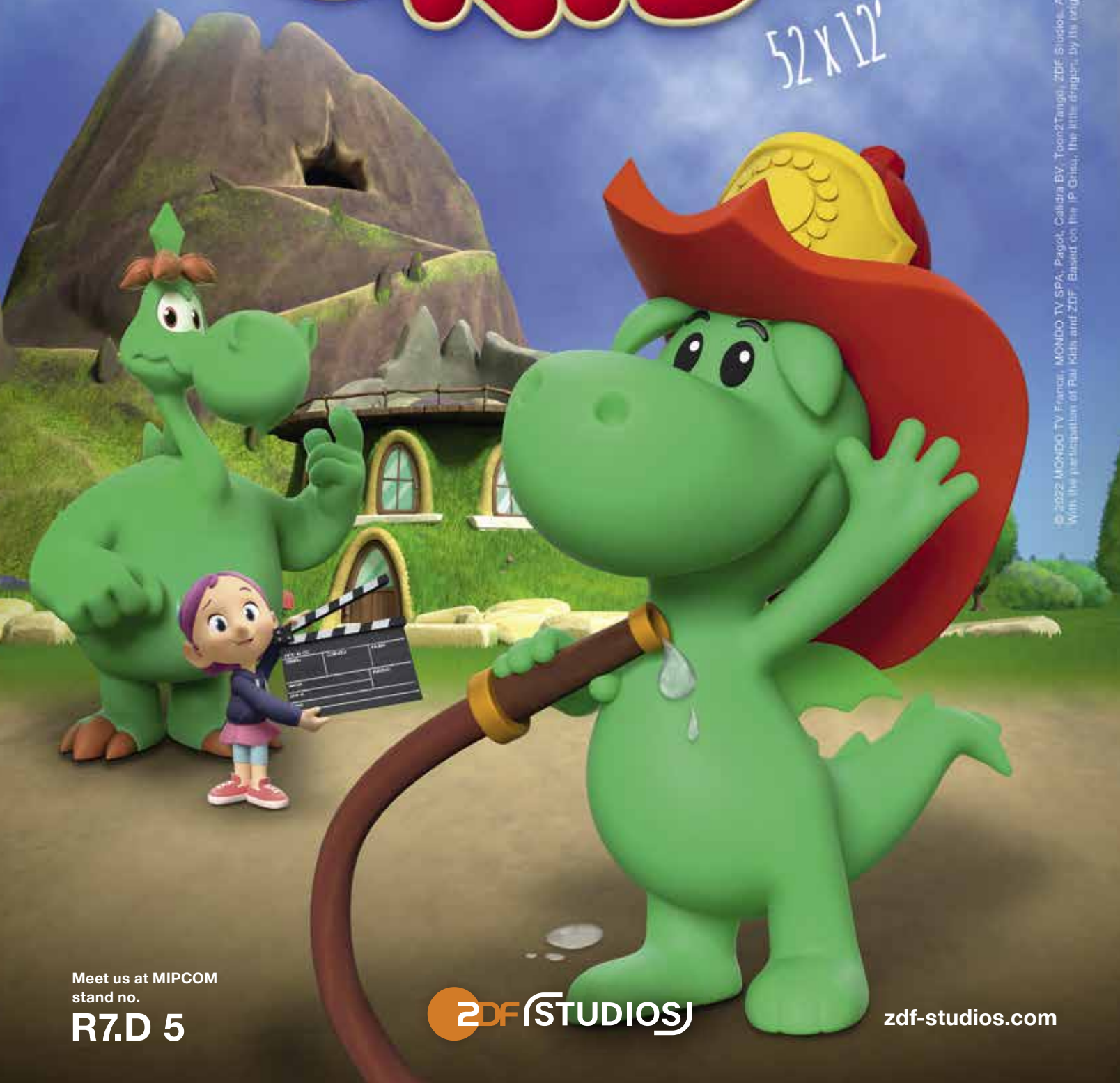
"We've moved at an unheard-of pace," she says about the deal, which went from idea to handshake in just seven months. "[The time between] the announcement that we were developing these properties and the partnership with Nelvana was infinitely shorter than most."

THE OPPORTUNITY: It's all about seeing everything as an idea, says Perez-Brown. "With the two or three IPs that we're working with right now, we're talking to publishers, and we already have scripts and bibles on the way for traditional TV series. We're also looking at ways that we can enhance the NFT experience by launching a new NFT with different traits or different characters that may or may not be related to the original NFT."

No matter what model is on trial, companies will need courage and confidence as they experiment in new spaces. And then, of course, it will be up to kids to determine just how far they'll go. **K**

GRISÜ

52x12'



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It's a small world after all

The pandemic accelerated the aging down of smartphone ownership, and the effects for content creators could be profound.

BY: GARY RUSAK

For prodcos making content for kids, the world is shrinking...and fast. Screen sizes are getting smaller, episode durations are getting shorter, and content producers are responding with snackable morsels that can be easily consumed on pocket-sized devices.

The reason is simple: Ownership of smartphones is aging down at an extraordinary rate, resulting in higher-than-ever demand for short-form kids programming, according to the latest data from UK-based researcher and consulting firm Dubit.

The migration of kid eyeballs to smartphone screens started well before the pandemic turned the world upside-down. But the radical change in how kids content is consumed was accelerated by quarantine conditions, says David Kleeman, SVP of global trends for Dubit. "We knew that we would get here sooner or later, but it probably arrived a little quicker than we anticipated," he notes.

During the pandemic, with its ubiquitous lockdowns, online learning and shelter-in-place mandates, more and more parents

around the globe began allowing their kids to have phones at a younger age.

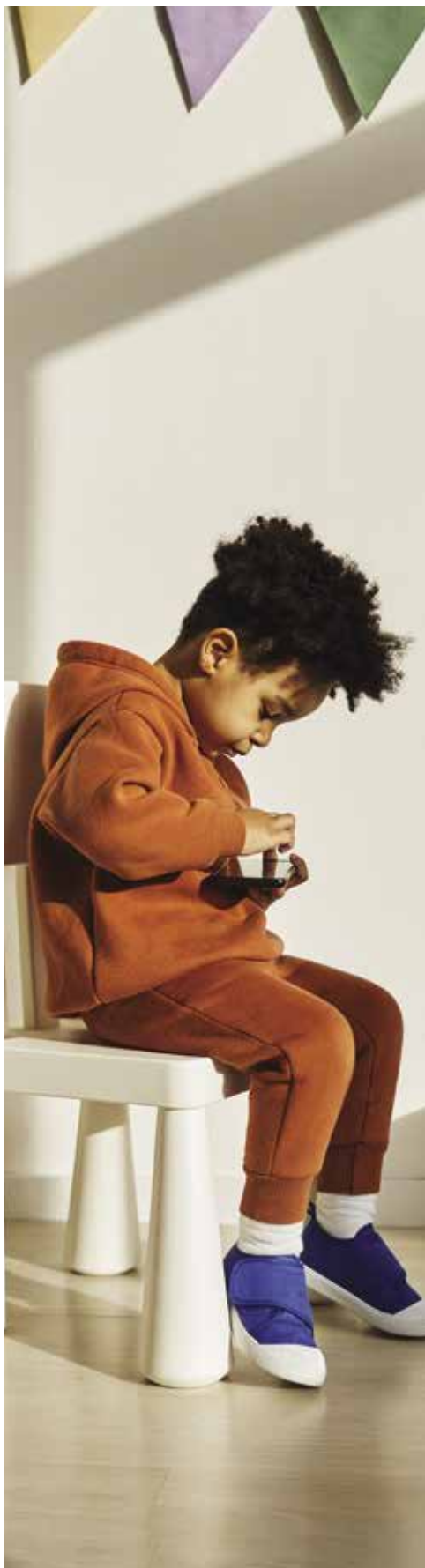
"A lot of parents wanted their kids to have the freedom that a smartphone brings," says Kleeman. "Even if they couldn't be with their friends or go outside, they wanted to be in touch with [their friends]."

According to Dubit's latest trend study, 57% of nine- to 12-year-olds surveyed in the US now have their own smartphones. In some European countries, like Germany, that number jumps way up to around 77%.

Zak Jinks

104X13'





And smartphone ownership among an even younger cohort is also growing. “In the past, we found that the tablet was a rite of passage for six- to eight-year-olds,” says Kleeman. “But kids are starting to feel like tablets are for babies now. It’s a shift from push to pull—younger kids are now wanting to be in control of their engagement.”

The current revolution in smartphone ownership promises to usher in a “total revision of thinking on the part of content creators,” adds Kleeman.

But one company’s attempt to exploit the growing appetite for short-form, smartphone-exclusive programming for an older demographic offers something of a cautionary tale—namely, the high-profile flop of mobile streaming venture Quibi, founded by former Disney chairman Jeffrey Katzenberg in 2020. The startup commissioned hundreds of millions of dollars in content before shutting down operations after only seven months.

Kleeman acknowledges that the timing of Quibi’s launch could not have been worse. It debuted in April 2020 and was, to put it charitably, DOA. “Those little moments that they were programming for, like waiting for a bus or short breaks at work, all at once just disappeared,” he says. “That was obviously out of their control, but there was a major miscalculation beyond that, too.”

The crucial mistake, according to Kleeman, was the underlying incongruity between the programming Quibi was commissioning and the way it was going to be consumed.

“The content has to fit the platform,” he says. “[The series that they were commissioning] were too much like traditional TV. With high-budget stuff, people want to enjoy it, see it on a big screen and become immersed. I think people might have looked at it and said, ‘I don’t want to watch this in five-minute chunks on my phone.’”

Marrying medium and message is as important in the kids space as it is in the adult space, according to Anttu Harlin, CEO of Giggiebug. In fact, the Helsinki, Finland-based prodco has taken this idea to the extreme with its new original series *Tadpoles*, which was created to be watched vertically rather than horizontally.

Appropriately set in a pond, the animated series is designed to be consumed on a smartphone, emphasizes Harlin. “In *Lord of the Rings*, the characters are on a quest, moving from left to right across the screen,” he says. “That is meant for a wide screen. We thought that since *Tadpoles* is going to be watched primarily on smartphones, we need to flip it around [and make the action vertical].”

Just as the physical design of a series has to be adapted to fit the specific size and shape of a smartphone, so too does the duration. That’s where the concept of “snackability” comes into play. “We know that shorter content works better on a phone,” says Kleeman. “Look at the rise of TikTok as the most obvious example.”

On smartphones, the pace of consumption and other factors like FOMO (the dreaded “fear of missing out”) have put an unprecedented premium on bite-sized programming that runs anywhere between 10 seconds and two minutes long.

“If a child watches something that doesn’t really engage them, at least they aren’t missing something else that would,” he explains. “It doesn’t represent a huge time commitment, and if they get interrupted, it’s not a big deal.”

The challenging part of creating short-duration content is that it’s counterintuitive to everything we know about brand-building in the entertainment space.

And this consideration is paramount for Harlin. “I don’t think [short-form content] gives you as deep a commitment to the characters on an emotional level,” he says, adding that revenue from ancillary streams such as licensing and merchandising is only possible when that critical connection is cemented. “We think of micro-content on digital platforms as a starting point; it’s pretty risky to build your monetization model on revenues from mobile alone.”

In the end, while the changing technological environment is transforming what kids watch and for how long, prodcos will want to make sure that their bottom lines won’t shrink along with screen sizes.

That’s why Harlin insists that the age-old tenets of storytelling must apply.

“Whatever the format, we still need people to come away saying, ‘Wow, these characters are awesome’ and ‘I want to hear more of this story!’” **K**

Taffy

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Feeding the fan frenzy

As conventions return to live events, toyco's are producing more show-exclusive products to build brand equity and consumer loyalty.

BY: COLE WATSON



Mattel released this Jurassic World Outhouse Chaos set as part of a special convention-exclusive promotional event

After three years of canceled and scaled-back events, fan conventions are returning in full force, drawing crowds of more than 100,000 back to San Diego and New York for their Comic-Cons. And fueling the hype are toyco catalogues filled with convention-exclusive products that are both badges of honor and Con souvenirs—an irresistible combo for superfans of all ages.

For Jeremy Padawer, chief brand officer at Jazwares, the objective when developing these exclusive products is not margin or profit, but enhancing the company's portfolio of brands by directly engaging with its dedicated fanbase.

"The business of toys today is about serving multiple groups of people," Padawer tells *Kidscreen*. "I'm a believer that if you service [collectors] and you do that in a good, meaningful way, they tend to be much more completionist than any other consumer. They're willing to dive deeper and help grow the brand."

Padawer says the collector market's members are as young as 13 years old and account for 25% to 35% of a toy line's consumer base, depending on the strength

of the brand. In Jazwares' case, this means developing exclusive products with wide collector appeal—such as All Elite Wrestling and Halo action figures, Squishmallows and Pokémon plush lines, and a fleet of Star Wars Galaxy Squadron vehicles.

One strategy the LA-based toyco hones in on when constructing its fan expo products is balancing scarcity and value for consumers. "If you're going to a convention, don't be a manufacturer that's trying to squeeze every dollar out of your consumer," advises Padawer. "You should be giving them a value and a benefit because they are willing to stand in line for you. If you make 10,000 pieces of something, don't expect them to be all that excited about it if there's only an audience of 6,000."

While Jazwares focused on producing five convention-exclusive products this year for San Diego Comic-Con (SDCC), Mattel unveiled 12 new collectibles for the show during its 12 Days of Fandom campaign in July.

The LA-based toyco's strategy is to honor its iconic properties (such as Jurassic World, WWE and Masters of the Universe) by developing exclusives that celebrate events in

their pop culture, says PJ Lewis, VP of global marketing and portfolio leader.

"We want to do what we can to deliver great experiences for fans around our IPs and deliver joy to the widest audience possible," says Lewis. "In the case of a brand like WWE, it's really an IP that reflects pop culture. You don't need to be a wrestling fan to buy the No Holds Barred two-pack or the Slim Jim Randy Savage because these [toys represent] iconic moments."

Other pop-culture exclusives Mattel developed for this year's SDCC include the Jurassic World Outhouse Chaos set, which recreates the T-Rex's vicious attack on unsuspecting attorney Donald Gennaro from the original *Jurassic Park* film; and the Masters of the Universe 40th Anniversary two-pack, which pits He-Man against his archival Skeletor in Mattel's new seven-inch Masterverse action figure line.

Unlike Jazwares, which focuses on scarcity to add value to its products, Mattel is increasing the quotas of certain releases based on what the toyco is hearing from its community, says Lewis. "We don't look at scarcity as a strategy. We look at trying to size what we



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Mattel's Masters of the Universe hits high nostalgia notes but also has new fans, thanks to the IP's Netflix revival



NECA's Teenage Mutant Ninja Turtles are a hit with 40-something parents—and their kids



This one's for the dads: The Thing at 40



Over 30 points of articulation make Mattel's WWE nostalgia figures both playable and collectible

did last year and determine how many more products we need to build," he says. "We want as many fans to participate as possible, while making sure we're not in a position of overbuilding an item or getting stuck with some inventory."

While Lewis sees SDCC as one of Mattel's pillars on the convention circuit, the company has begun to evolve its collector-targeted toy business by participating in new shows and developing exclusive online products through its e-commerce platform, Mattel Creations.

"I think what we do at Comic-Con and for fans now is a 365-day proposition," says Lewis. "We've built this [direct-to-consumer] arm in Mattel Creations, which is not just helping to shape our exclusives at Comic-Con, but also allowing us to collaborate with various writers, artists and brands to support IPs that may not necessarily strike you as collector brands."

Since launching in 2020, Mattel Creations has released several new collectible toy lines based on Mattel's portfolio of IPs, including the Hot Wheels Collectors series, the

Monster High Haunt Couture fashion doll collection and exclusive MEGA Collectors building sets.

Meanwhile, National Entertainment Collectibles Association (NECA) has embraced e-commerce for several years at conventions, establishing a six-week pre-order window on its online store to allow both show attendees and regular customers the opportunity to purchase exclusives.

"For customers who can't go to the show, certainly there's been a number of challenges in the last few years," says NECA senior director Randy Falk. "It's hard to get tickets for these shows. It's expensive to travel, and San Diego generally sells out a year in advance. We've tried to make our system as fair as we can."

The pre-order window has also been a helpful tool for helping NECA gauge supply and demand for exclusive products, adds Falk. By announcing its SDCC lineup by the end of May, the New Jersey-based toyco can quickly determine which items are selling the fastest, and adjust its production strategy accordingly.

NECA produced four convention exclusives this year: two four-packs for Teenage Mutant Ninja Turtles; Dungeons & Dragons Lost Wave action figures; Wedding Greta from *Gremlins 2*; and a 40th-anniversary The Thing figure. The pre-orders are then fulfilled at either the on-site booth at the convention or shipped out two weeks later so consumers are getting the products at around the same time.

An emerging trend Falk has begun noticing is that, due to supply chain issues, some companies didn't physically have their exclusives at the convention. "At the booths, it was a pre-order and fulfillment-later system, or QR codes that you could scan—but you're still not getting the figure for several months," he explains. "I usually come out with two gigantic tote bags or another full suitcase of stuff every year. This was the first time I left Comic-Con empty-handed."

Despite some companies no longer fulfilling orders on the show floor, exclusive products are definitely here to stay, and they have become an important part of most modern conventions, Falk says. "Having these exclusives serves two main purposes: The marketing helps create awareness for different toy lines, and it helps offset the huge expense of doing these types of shows and events." **K**

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Playing with inflation

Ahead of the holiday season, the outlook for the toy sector is robust, despite a year of record price increases and recession fears.

BY: NICK KREWEN



With inflation at a 40-year high and US toy sales growth slowing in 2022, one might expect the category to be heading into choppy waters for the holiday season and beyond.

At first glance, the data doesn't look promising. The first six months of the year saw US toy sales increase by only 2%, while unit sales declined by 6%. But that's not the whole story, says Juli Lennett, SVP and industry advisor for toys at the NPD Group.

"We've had two record-breaking years of US toy sales," says Lennett, citing back-to-back increases of 18% in 2020 and 20% in

2021. "When you factor that in, we're still well ahead of pre-pandemic times."

Toys are a particularly resilient category, notes Steve Pasierb, president and CEO of The Toy Association. "The average spend per child in North America doesn't really change much, inflation- or recession-wise. What changes is what parents buy for their kids."

NPD found that while there have been some declines so far this year in the 11 toy "super-categories" it tracks, six of these have posted double-digit growth rates since 2019, with explorative & other toys (26%), plush (25%) and games & puzzles (20%) leading the way.

Behind the numbers, the 26% bump in explorative & other toys was fuelled by sports trading card launches; building sets were up 8%, thanks to LEGO; and the return of summer blockbusters such as *Jurassic World: Dominion* and *Sonic the Hedgehog 2* fuelled action figure sales. Meanwhile, Jazwares juggernaut Squishmallows continues to keep the plush category fluffy, contributing seven of the top 15 best-selling toys for the period and playing a significant role in the category's growth (along with Disney and Moose Toys' Magic Mixies line).



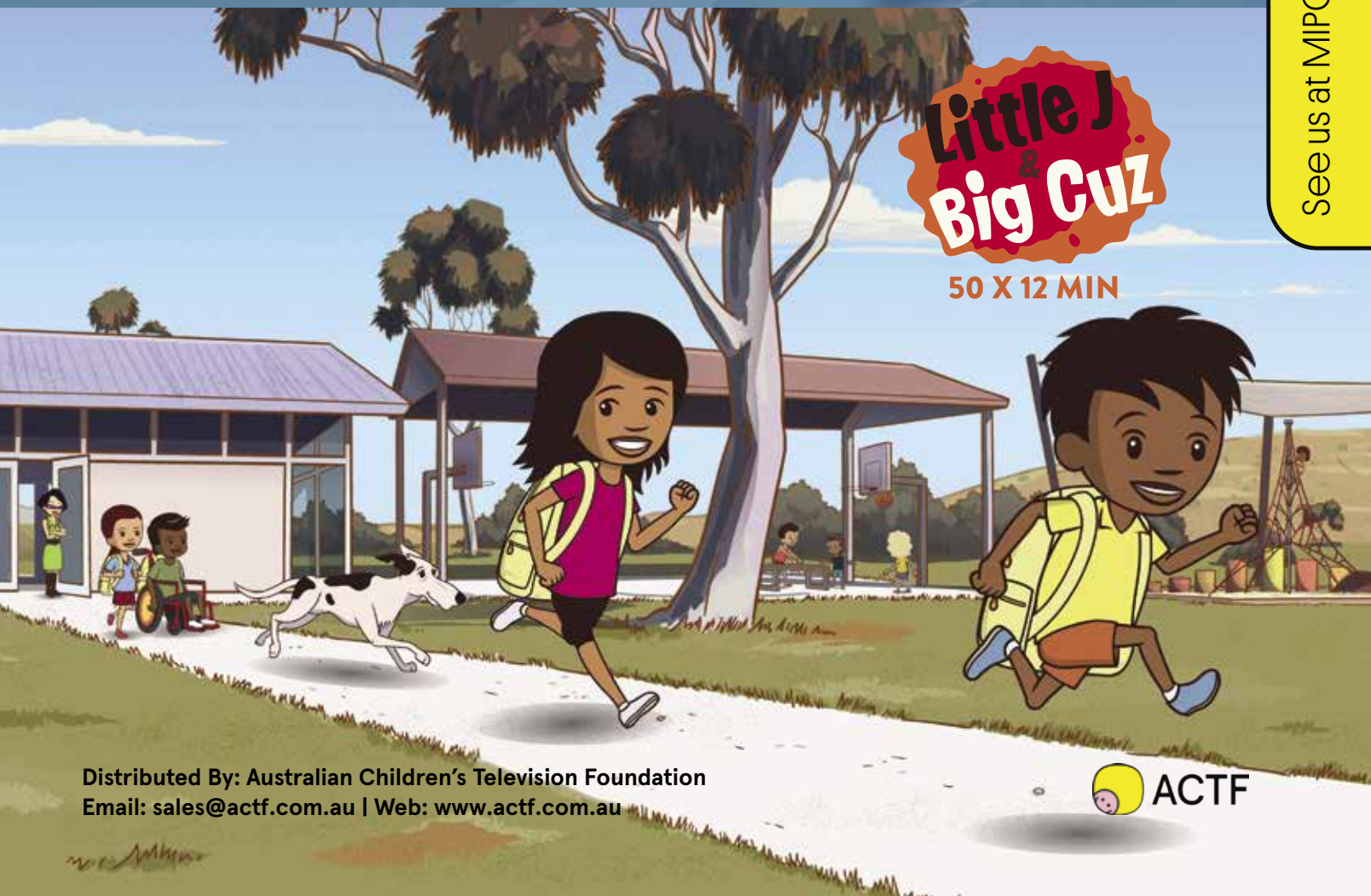
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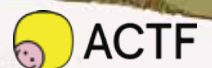
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The number of growth categories is notable because prices have increased year over year since 2019. The average price of a toy currently sits at US\$11.30—representing an 8% annual increase (which pales in comparison to a 19% price jump in 2020) due to higher supply chain costs. And this year's unit decline is likely related to the higher average price per toy, notes NPD's Lennett.

Market leaders Mattel and Hasbro both raised toy prices in 2022 to combat higher costs, but each posted a strong first-half nonetheless. Mattel went so far as to announce more planned price increases to counter rising raw material, freight and labor costs, and Lennett says prices will undoubtedly keep rising as long as inflation is in play.

"If inflation continues, I suspect that manufacturers are going to have to pass on those increases to their customers, and retailers are going to pass them on to consumers," she says.

However, that doesn't concern Pasierb, who reiterates that what parents buy may change, but how much they spend remains relatively stable. He says the average toy spend per child in the US was US\$366 in 2021—the highest in the world—followed by Europe at US\$222 and Asia at US\$35. And he expects household toy spend to remain status quo.

"Inflation is softening. The pricing gap is coming down. Those are all good signs," he says. "Supply isn't an issue with the ports, [and] as long as gas prices keep coming down and inflation doesn't take off again, families are probably going to spend on their kids."

That said, price sensitivity is a concern. In the Q2 report it released in mid-August, Walmart pointed to consumers leaning more heavily on sales and clearance racks outside of the grocery aisle—a trend that affected its quarterly consolidated gross profits.

Three weeks later, the retailer announced a new category of "under US\$25" toys in its annual toy list and an increase in the number of its branded "Rollbacks" on holiday toys.

It's a change in consumer spending habits that is likely to put pressure on both manufacturers and retailers, notes Lennett. "I imagine they'll be looking to figure out how to cut costs as much as they can, because we do have psychological purchase price-points of toys at US\$9.99."

The pricing pressure is a trend Walmart CFO John Rainey pointed to in the retailer's



Q2 investors call, saying the company has seen an increase in consumer interest in lower-priced items. "We'll continue to manage pricing for customers in a way that preserves our price gaps and allows us to earn market share profitably," said Rainey.

The pressures are also likely to continue on the supply side. It's an issue The Toy Association is working on with its members, specifically to diversify the supply chain and reduce China's dominance in the sector, says Pasierb.

"Companies around the world are looking to get their manufacturing closer to the customer," he says. "Mexico is actually growing in importance, [and] some companies are manufacturing in Europe."

Pasierb sees speed to market and supply chain diversification as probably the biggest issues the toy industry will face over the next

couple of years, along with environmental sustainability. "Consumers don't want as much packaging, and they want to make sure that things are recyclable."

As for the holiday season ahead, NPD's US toy industry report highlighted one other key insight—how place influences spend.

"Consumers are making fewer trips to buy toys, and buying fewer toys per trip, but [they] are spending more money," Lennett notes. "Whereas, in the online channel, consumers are making more trips and buying more toys per trip—resulting in stronger growth in the online channel."

It's a trend with the potential to influence toy rollouts: Will higher-priced premium items command more shelf space, leaving competitively priced items to duke it out online in an algorithm-fueled battle for SEO dominance? Only time—and more data—will tell. **K**



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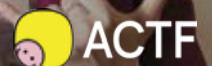
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BANDWAGON

Product trends on the road to retail

State of play

Exploring the trends shaping play into holiday sales.

BY: CHRISTOPHER BYRNE



As we bear down on the holiday selling season for toys—the “hard eight,” as the two-month sales push in Q4 is often called—bets have been placed, retail sets and online storefronts are ready to go...and everyone’s fingers are crossed for good measure.

As I write this in the waning days of summer, no one can accurately predict which toys will sell. But it is possible to look at trends shaping how kids play, and what that might mean for companies in the holiday season.

THE METAVERSE: Forgive a little crankiness, but where kids are concerned, this is just a fancy word for online play. Roblox and Minecraft are the leading platforms, and kids are spending lots of time on them. Marketers are responding by embedding advertising and even creating their own games, but as tracking service Backlinko notes, there are currently 40 million active Roblox games. So you still have to get kids engaged, and that likely means some form of traditional marketing.

As kids socialize more online (in addition to IRL), brands and properties need to implement strategies for engagement, play and sharing kid-generated content on these platforms.

REPRESENTATION: With diversity growing in importance as a cultural value, kids and families are looking for toys—and dolls, in particular—that reflect diverse identities. Not long ago, companies were hedging their bets with “racially ambiguous” offerings, allowing the child to project onto the doll what they wanted to see.

This is classic play, and it’s still valid with characters. But there is also room for literal representation of different races, as lines like The Fresh Dolls (pictured) have demonstrated. This may change some product strategies because of potentially smaller audiences. But addressing specific niches may offer points of difference in the market, as well as more potential for creating products.

We’ve also been hearing from parents that they’re looking for different expressions of gender in toys. This is a growing awareness—not huge yet, but worth considering. Even when boys and girls gender-identify in traditional ways, parents are beginning to look for toys that aren’t prescriptive. It’s all about a child’s freedom to express themselves authentically without being told that they “should” be one thing or another.

SUSTAINABILITY: We will continue to hear a lot about this, but it’s primarily a concern for older consumers.

If a child wants a toy, they don’t care whether it or its packaging is from sustainable sources. That said, parents are definitely paying attention.

ENTERTAINMENT: From everything we can see, particularly with properties like Bluey and CoComelon, what’s resonating with kids now are characters and storylines that reflect their real world, rather than a fantasy world—and that’s what they want to take off the screen and play with.

Stories about home, family and friends are what kids are selecting as they choose what and when to watch in this on-demand era. Plus, shorter, “snackable” content provides more flexibility as limiting screen time becomes more prevalent since the pandemic.

There is one constant in all of this: Toys reflect the world children live in—they always have, and they always will. Understanding how kids perceive that world—and what’s influencing their perception—remains the best way to encourage play (and, ultimately, boost sales). **K**



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ACTF



"Baller" Xavier

Passions fuel new personas

A wave of demographic, tech and lifestyle trends has redefined how kids express their interests—and savvy creators should take note.

BY: WYNNE TYREE



"Furry" Aleah



"E-boy" Hunter

Xavier's world revolves around basketball. His bedroom is drenched in University of North Carolina colors and signage because that's where he plans to play college basketball someday. His closet is filled with Nike sneakers, his drawers with court-ready tees and shorts that round out his athletic look. Afternoons are spent shooting hoops in the driveway or at practice, and summers are all about basketball camp.

Xavier fuels his passion with YouTube highlights of gifted players, social media feeds of basketball influencers and documentaries about NBA stars. He is a self-proclaimed "baller"—that's what his peers call him, too.

Aleah's worldview and aesthetic are quite different. Her room is covered in animal prints and cat-themed decor. "I'm a cat" T-shirts hang in her closet alongside belts with removable tails. Fuzzy slippers that mimic paws and headphones with "ears" rest next to her bed.

Aleah strongly believes "animals are better than people," and she isn't embarrassed to admit that her cat, Oreo, is one of her best friends. They snuggle, watch *Unikitty* and *My Cat From Hell*, and send her friends funny cat GIFs and pictures.

At school, Aleah loves pretending she's a cat. When asked about a test grade, she licks her closed hand and rubs it across her eyebrow or makes a hissing sound. Friends understand the secret language and give her a sympathetic hug. Others at school know Aleah and her friends as "furries"—animal lovers who act like animals.

She takes pride in the "furry" moniker and is frustrated that her school recently created

a "no tails, no ears, no collars or leashes" policy that quells her self-expression. (School administrators see it as a distraction and worry that it could be confused with the sexual or fetish-based "furries" of the adult world.)

Hunter is fine if you refer to him as "they," "he" or even "she." He sees gender labels as limiting, and believes that adults obsessing over pronouns is silly. In fact, he finds many things ridiculous.

He's a thinker and a feeler, with as many girl friends as guy friends—all with long, dark bangs that create a pensive mystique. Hunter is artistic and expressive, with pens, markers, song lyrics and sketches scattered all over his bedroom. Black eye liner sits on a bedside table, while plenty of black clothes and high-top Converse sneakers rest in the closet.

Hunter's aesthetic represents the darkness he sees in the world—school shooters, divorce, abuse, climate change, racism, violence. To escape, he binge-watches *Stranger Things* and listens to emo rappers like Lil Peep and Juice Wrld.

Schoolmates refer to Hunter and his friends as "emo kids" or "e-boys" and "e-girls." He doesn't care about the label; he's more focused on convincing his parents to let him get his first piercing.

Xavier, Aleah and Hunter aren't teens in your local high school. They are 12, eight and 10 years old, respectively. Alongside peers like the attention-hungry "Pickme Girl" and the Pokémon- and Naruto-loving "Anime Kid," they are part of a new wave of kids who have found their passions—and their people—much earlier than past generations.

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THUNDERBIRD DISTRIBUTION

Children coming of age in the 2020s are the product of several demographic, tech and lifestyle trends that have coalesced to create niche-based kid personas that are deeper and more distinct than those of yesteryear.



DEMOGRAPHIC SHIFTS

There are more “only children” around the world today than ever before. Growing up in a single-child family—particularly during a pandemic—can result in more solitary play, personal exploration and longing for like-minded peer groups and playmates.

As well, a record number of kids are now home-schooled, “unschooled” or attend remote K-12 institutions. This, too, can create strong desires to connect with peers.

Pet ownership is also at an all-time high. More adults treat and refer to their pets as their children/babies and see them as family members. Hence, more children are growing up with four-legged “siblings” and playmates.

TECH-FUELED PASSIONS

Childhood is defined by curiosity and discovery. It’s also a highly social time, when kids come to understand the world and their place in it through interactions and experiences. They *need* social engagement and will find it if it’s missing.

Growing up during the pandemic meant that many opportunities for IRL social engagement were put on hold, and digital exploration and discovery took over. Kids connected with existing friends and met new ones who became “their people” via shared digital experiences.

Through TikTok communities, YouTube videos and even Google searches, kids have

found more information about—and more people who share—their (often niche) interests, in turn fueling their confidence in that interest.

THE ALGO EFFECT

Endless streaming content options—assisted by “for you” algorithms—have allowed young people to explore their interests and discover their passions in ways that linear programming and traditional kid broadcasting never have.

Like adults, kids have gone down the digital “rabbit hole” to learn anything and everything about their topics of interest.

DIGITAL IDENTITIES

The expansion of avatars, the metaverse and anthropomorphic playthings continues to blur the lines between reality and fantasy, digital and IRL personas. Kids can be whoever they want to be online, so why not in real life, too? If Aleah can be a cat on Fortnite, Roblox and TikTok, why not at school?



UNDER THE INFLUENCE

Social media influencers play a key role in feeding children’s niche interests and behaviors. If a kid is into makeup, there are tens of thousands of influencers available with a tap or a click to give advice, show off their skills and inspire makeup creativity. The same is true whether a kid is passionate about dogs, dancing or interior design.

While kids enjoy connecting with their IRL friends about common interests, they are also OK having more unique passions because there are plenty of other kids/influencers to engage with about them online.



EXPRESS YOURSELF

Globally, there has been a push towards kids speaking up for and expressing themselves. Concerned about children’s physical and mental well-being, adults have told kids to share their feelings and find friends they can connect with and rely on.

Kids and tweens are finding their people and creating their “tribes” in ways formerly seen among teens. Today, more personal exploration, identity development and creation of like-minded (and similarly dressed) friendship circles is taking place between ages six and 12.

OPPORTUNITIES

Understanding kid archetypes can help content and product developers create more relevant and authentic characters, storylines and offerings. Profiles can also serve as a foundation for segmentation in the ever-changing kids marketplace, allowing companies and marketers to zero in on key prospects while identifying their typical style, behaviors, product needs and brand wishes.

The long-standing mission “to create for all kids” is becoming less effective in an era of niche-based affinities and kid/tween personas more akin to teens of yesteryear. Segmenting kids beyond broad age groupings and (sometimes) gender is worth a second look. **K**

Kid types are derived from one-on-one interviews with more than 80 US kids ages six to 12, parents with kids in this age range, and elementary and middle-school teachers.

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Lights, Cameo, Action!

Personalized messaging platform Cameo broke out by breaking down the fourth wall between celebrities and their fans. Now, a handful of kid-facing brands are testing the waters—and their insights are as individualized as their messages.

BY: RYAN TUCHOW

Cameo wants the kids entertainment industry to know that it's open for business as it aims to become a hub for brands and creators looking to engage young fans.

Since launching in 2017, the online platform has carved out a solid market niche for itself as a service that lets consumers buy short, personalized video messages from celebrities running the gamut from skateboarding legend Tony Hawk to OG rapper Snoop Dogg.

Its business really took off during the pandemic, when stuck-at-home consumers flocked in droves to Cameo as a way to reach out and connect with friends and family. Today, the platform has a roster of 50,000-plus personalities, who have delivered more than four million Cameos and live calls to their fans around the world.

But the reach of these messages is exponentially bigger than their sum total, says Cameo president Arthur Leopold, given that 85% of them are shared on social media or otherwise distributed to friends by their recipients.

A number of TikTok celebs, voice actors and stars with kid appeal are longtime residents on the platform, including Scott Innes (the voice of Scooby-Doo) and Ernie Sabella (who voiced Pumba in *The Lion King*). But kids entertainment brands were noticeably absent until more recently.

The platform added popular YouTuber Blippi in 2019, and then cut a deal with Universal to offer messages from *The Boss Baby* in October 2021. The success of those launches has piqued the company's interest. "We want to partner with more studios and IP holders," says Leopold. "Kids content is a big opportunity for us."

The company is primed for growth right now after securing US\$100 million in funding this past March. And breaking into more niches and fandoms is high on its priority list, according to Leopold. Cameo is also introducing new features that will give kids a wider variety of options for connecting with the characters they love, such as live events with 10- to 15-minute streaming experiences and live video calls.

Outside of mascots at live events, there aren't really many opportunities in the market for personalized interactions, explains Leopold. "On Cameo, brands and characters can say something directly to kids, and that kind of engaging experience can turn a child into a fan for life."

This potential for building long-lasting fan relationships is a big reason why Toronto's Guru Studio chose to bring its flagship animated series *True and the Rainbow Kingdom* onto the Cameo platform in June.

Guru Studio's *True and the Rainbow Kingdom*'s Cameo profile lets fans order custom greetings from its star character

Guru had already been receiving requests from parents wanting True to speak to their kids in personal videos. But at the time, there weren't many kids brands on Cameo, and animated characters were even rarer (with the exception of a few big brands such as Mattel's *Thomas & Friends*).

The studio saw an opportunity to meet an existing demand while also building a new type of consumer product that could mark key milestones in the lives of kids, says VP of marketing Daniel Rattner.

True is one of the first animated characters to be featured on Cameo, where families can order short videos in which the namesake character wishes kids happy birthday, celebrates their milestones (like school graduations), or just says hello. The





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videos are about a minute long, and Guru charges US\$25 for each one (with Cameo taking a standard 25% on all transactions).

The work of animating and customizing the videos would have been too costly and time-consuming for the studio to handle solo, so it turned to Texas-based software developer Aquifer Motion. Aquifer has built a platform that uses 3D animation, AI and AR to let producers create videos for any platform—a service that's perfect for Cameo.

Live performers can record themselves reading the customized message, and then Aquifer's tech will automatically overlay True's animated face and voice onto the videos.

Guru provided Aquifer with artwork and oversaw the animation featured in the video messages to ensure that it was faithful to the show. The studio also built a simple pipeline for scripting, approvals and animation to make sure turnaround would keep up with demand. Using this process, Guru is typically able to deliver a video message in three days.

The response from kids and families has been positive, and when kids share their reactions to the videos on social media, Guru can see in real time what works and what they love most about the brand, says Rattner. "Personalized video is an exciting opportunity to move beyond the traditional experiences of consumer products and TV," he says. "It offers something unique, personal and intimate."

Cameo is also proving to be a timely replacement for live events, adds Steve Watts, a YouTuber whose channel, Steve and

Maggie, has amassed 5.4 million subscribers. Its namesake preschool show features Watts and a bird puppet singing songs, telling bedtime stories and playing games.

COVID-19 put all live performances featuring Steve and Maggie on the shelf, and those opportunities still haven't returned to pre-pandemic levels. But since joining Cameo in 2020, Watts has been able to connect with his fans around the world through live calls and personalized videos.

As he looks to expand his brand beyond YouTube, Watts can also highlight his success on Cameo in meetings and negotiations with potential broadcast and distribution partners. His 250-plus Steve and Maggie videos on the platform, along with the positive reviews they've generated from happy customers, help him demonstrate the IP's popularity and potential for engagement.

Watts has also discovered some simple strategies for success on Cameo, such as increasing the price for a video if the demand reaches a certain level, or setting up windows in the live experience function where he can meet with 20 to 30 fans one right after the other.

"There were more and more requests coming in for me to record messages, and Cameo came on my radar at the right time," says Watts. "With a click, I can get thrown into someone's living room and talk directly to fans."

Kids yoga sensation Jaime Amor—whose YouTube channel Cosmic Kids Yoga has 1.3 million subscribers—says Cameo helps her

interact with her audience in a way that isn't possible otherwise. On YouTube, Amor's ability to converse one on one with her viewers is restricted because comments aren't enabled on videos for kids.

During the pandemic, she was flooded with emails from families asking her to make personalized shout-out videos to wish kids happy birthday or give them a pep-talk, and she was fulfilling these requests herself.


Going it alone was time-consuming and left too much room for errors—Amor had to make notes about what families wanted her to say, record the videos and then email them out directly to the recipients. Managing this "side business" with her regular content production schedule quickly became overwhelming.

Amor joined Cameo at the start of 2022, seeing it as a way to make the process quicker and easier. Now, she simply opens each request from a notification that comes through on her cell phone, which activates her camera and a teleprompter pre-loaded with the message details. She records the greeting on video and sends it off right away.

She can also re-record as needed, and the app keeps her up to date on deadlines so she doesn't miss a kid's birthday.

The app also handles payment and video delivery, and lets Amor send a quick text message through its chat function to thank the person who made the request. So far, she has only made around 10 videos this way, but she hasn't started marketing the fact that she's on the platform yet (wanting to test the waters first).

Despite taking it slowly, Amor says Cameo is already opening up other opportunities beyond one-on-one personal videos. For example, she has received several requests from teachers who want her to give encouraging pep-talks to their classes to get kids excited about exercise and physical activity. She sees this group approach as a new way to reach larger audiences, while still making something special and personalized.

She adds that the future of personalized videos for kids looks bright. "It's a wonderful connection that's super-personal. Kids can participate in what you're creating when they send in what they want to see, and that makes the content mean so much more to them. And it builds their engagement with the final product." 



Cameo helped YouTuber Steve Watts stay connected with fans when the pandemic forced the cancellation of live events



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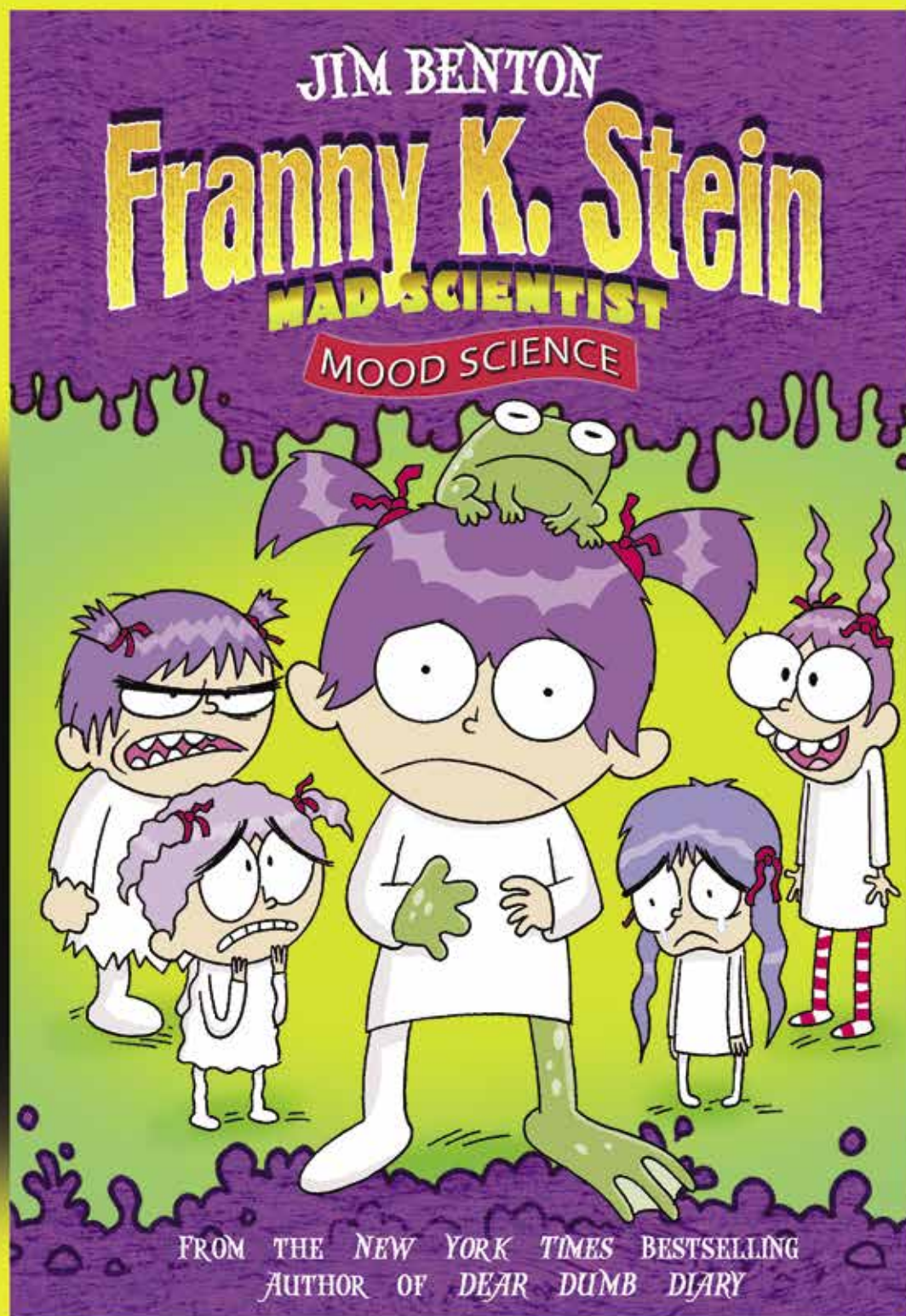
Anime's ultra-distinctive aesthetic, edgy undertones and emotional weight have long made it a cult favorite with teens, adults and legions of Pokémon-loving kids. But with the rise of global streamers like Netflix, the genre has exploded, hitting a much wider demographic and driving demand across TV, film and books.

Exploring the impact of this resurgence, *Kidscreen* takes a look at the state of anime today, the growing popularity of manga—anime's source material—and how producers around the world are interpreting and adapting the genre. What emerges is not unlike anime content itself: a complex world with vexing challenges, colorful characters and a constantly evolving storyline.






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THE FUTURE OF KIDS ANIME

The anime market is hotter than ever as streamers continue to drive more and more demand. It's traditionally been a complex genre that's hard to break into, but there may be new opportunities brewing for hybrid anime series that can travel.

BY: JEREMY DICKSON

From auteur-based domestic beginnings in the early 20th century, to a global breakout driven by brands like Astro Boy, Sailor Moon, Dragon Ball Z and Ghost in the Shell, anime has long since outgrown its niche genre status.

And today's proliferation of streaming services such as Netflix, Disney+, Amazon and Sony-owned American anime SVOD Crunchyroll is fueling demand for both Japanese-made anime—often classified demographically for children (kodomo), girls (shōjō), boys (shōnen) and adults—and anime-influenced content produced elsewhere.

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Crunchyroll and Sony Pictures released *Dragon Ball Super: Super Hero* theatrically this summer, exceeding expectations with a US\$21-million domestic opening weekend



The anime market worldwide is expected to increase in value by 7.5% to US\$52 billion by 2032, according to Future Market Insights, with sales of content to online platforms driving much of this growth. And while Japan is likely to maintain the largest share of this business (it cornered 43% last year), other regions are starting to emerge as players—particularly the Middle East and Africa, where the anime market is predicted to expand by nearly 10% in the next 10 years.

Silas Hickey is a former Cartoon Network APAC executive who recently co-founded an animation studio called Custom Nuts (*Amy & the Afterlife*) in Tokyo. He says that while the global anime market hasn't reached a saturation point yet, domestic factors in Japan like an over-supply in certain anime genres, the cyclical nature of content trends and the country's declining youth population are making change necessary.

"Massive shōnen action-comedy shows like *One Piece*, *Demon Slayer* and *Jojo's Bizarre Adventure* have a huge export market driven by growing fandom and exposure on streaming platforms. But slice-of-life shows aimed at the bridge audience, such as *Doraemon* or *Crayon Shin-chan*, don't work outside of Japan because they're very parochial and quite different culturally from Western shows," Hickey explains. "I've been researching how to hybridize a new type of bridge anime that will work overseas and in Japan. Japanese studios need to start addressing generic diversification so that when the market does

cycle down, there will be other genres with massive potential to tap into, especially in terms of consumer products."

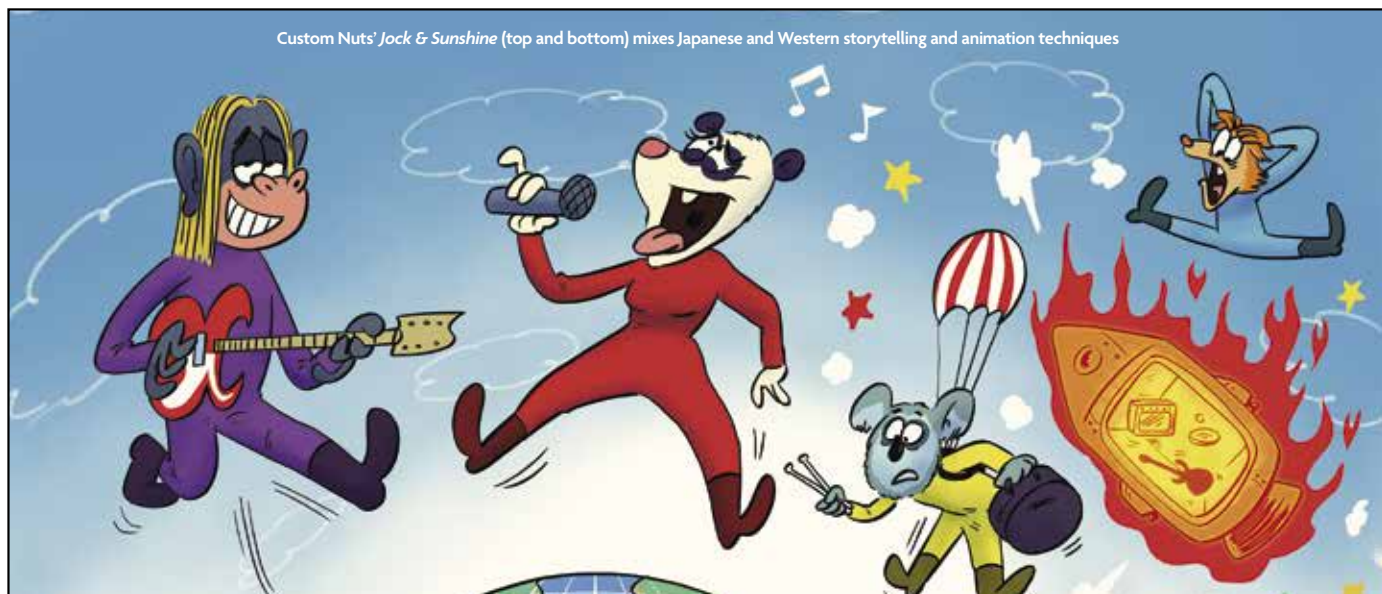
DEVELOPING ORIGINAL ANIME

What will this new hybrid content look like? In Hickey's view, exportable anime shows could blend slapstick mechanics à la *Tom & Jerry* (still one of the top American shows on terrestrial TV in Japan) with slice-of-life sitcom elements and heartfelt moments. Custom Nuts currently has a few original hybrid series in development, including *Jock & Sunshine*, a 2D-animated shōnen slapstick sitcom about a couple of crash-landed animal astronauts who are forced to work dangerous part-time jobs in order to survive life in a version of 1980s Tokyo.

"*Jock & Sunshine* mixes Japanese and Western storytelling with Japanese and Western animation techniques," says Hickey. "It's a great example of how we are proposing an important cultural exchange."

Yoshiya Ayugai, a creative producer at Singapore's August Media (*Tish Tash*) and a former Disney Japan and Cartoon Network Japan exec, agrees with Hickey's views on the potential for new types of hybrid anime shows for kids.

"For the development of an international co-production, slapstick and tears work well together, as they do in shows with heart like BBC's animated preschool series *Bluey*," says Ayugai. "Japanese audiences love to cry, so an emotional rollercoaster



Custom Nuts' *Jock & Sunshine* (top and bottom) mixes Japanese and Western storytelling and animation techniques

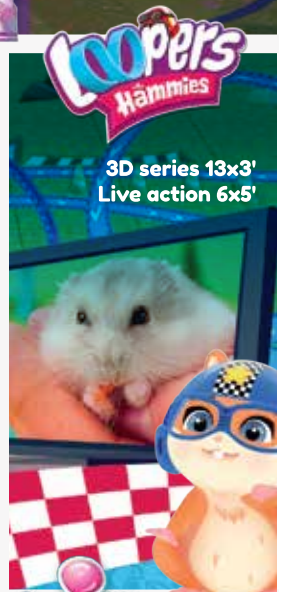


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Japanese studio TMS Entertainment's *Bananya* has a robust merch program and a place on Crunchyroll's preschool roster

© Q-LIA/Bananya Partners



type of story with a protagonist who is more humble than cocky could work well. Characters like SpongeBob SquarePants and Peter Parker from *Spider-Man* would resonate well with Japanese kids."

And Hickey believes US audiences, in particular, could benefit from hybrid anime shows with heart. "It's quite uncommon in the US to have narrative pauses for moments of introspection or emotional resonance. But in Japanese anime shows, it's very common to have close-up shots of facial features with tears, for example, and hold on these moments a lot longer than in a Western cartoon," he says. "There are a lot of Japanese series that have as much heart as shows like *Bluey*, but no one's made exportable versions of them yet."

INTERNATIONAL CO-PRODUCTION GROWTH

Custom Nuts isn't the only production company looking to develop new original anime series for kids through authentic collaborations. France's Cyber Group Studios (*Gigantosaurus*) recently struck a long-term partnership with veteran Japanese prodco Nippon Animation to co-produce new IPs and reimagine several

of Nippon's classic series. First up is *Nanami and the Quest for Atlantis*, a 2D/3D-animated feature film based on Nippon's '90s anime series *Tico and Friends*. And a new animated series that continues the film's storyline is also in the works.

"Given that the export market is so much more important to Japanese studios right now, I think they'll be more receptive to co-pro opportunities than they would have been just a couple of years ago," Hickey says. "Now is a really good time to have these conversations at industry events."

TMS Entertainment, which launched in 1946 and produces hit teen series *Detective Conan*, is another Japanese studio that's not averse to making Western-friendly content for younger kids, adds Ayugai. Though it's not a co-pro, TMS's popular two-season preschool anime series *Bananya*—about an adorable cat who lives in a banana—is currently streaming on Crunchyroll, which has given the show a global audience and wider L&M presence. Its consumer products program currently includes deals with partners including Gucci and Bioworld for products such as T-shirts, ties, footwear and desk collectibles.

"TMS is looking into making more kids content that will travel because its parent company is Sega Sammy," says Ayugai. "So anything in the kids space that works for an international audience and could eventually sell games and merchandising is encouraged."

Meanwhile, Crunchyroll has grown in a big way since Sony's Funimation acquired it from AT&T and WarnerMedia in 2021 for US\$1.2 billion. Now available in more than 200 countries and territories, the platform has become the world's largest anime streaming service, offering more than 16,000 hours of content. The company also does business in theatrical distribution, video games, home entertainment, live events and manga.

As a measure of its success in the feature film market, Toei Animation's *Dragon Ball Super: Super Hero*—the first Dragon Ball movie to be distributed by Crunchyroll—shattered expectations with a US\$20.1-million opening weekend in North America at the beginning of August. And its global take had

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increased to more than US\$47 million by the end of the month, according to tracking site Box Office Mojo.

Though Crunchyroll's audience tends to skew more 18 to 34, the majority of its content is appropriate for older tweens and teens, and the platform also provides a selection of family-friendly titles.

"When fans come to Crunchyroll, they're looking for a mix of new simulcast series [shows that can be watched the same day—usually within hours—as their broadcast in Japan] and nostalgic or classic anime titles," says Crunchyroll COO Brady McCollum. "Within anime, we offer hit tentpole shōnen titles like *Naruto* and *My Hero Academia*, but also romance, sports and slice-of-life content."

In addition to *Bananya*, the platform's family-friendly acquisitions include *Shōnen Ashibe GO! GO! Goma-chan*, about a baby spotted seal and a first-grader; and *Mitchiri Neko*, which tracks a group of mysterious cat-like creatures.

On the originals front, Crunchyroll has produced more than 60 titles to date, including several co-pros with Japanese partners, says McCollum. "We recently premiered the fantasy series *Kaina of the Great Snow Sea* at this year's Crunchyroll Expo. It's a co-production with [linear network] Fuji TV for its +Ultra programming block."

According to August Media's Ayugai, securing a partnership with a Japanese terrestrial channel is key for the success of new international co-pros in Japan. "Linear TV—not streaming—is the number-one way to access entertainment in Japan," he says. "Without some sort of terrestrial strategy, you are probably not going to be very successful there, especially on the kids side."

Custom Nuts' Hickey concurs. "To get a slot in Japan is a really difficult thing, and an expensive proposition because they are still massively coveted," he says.

OTHER ROADBLOCKS

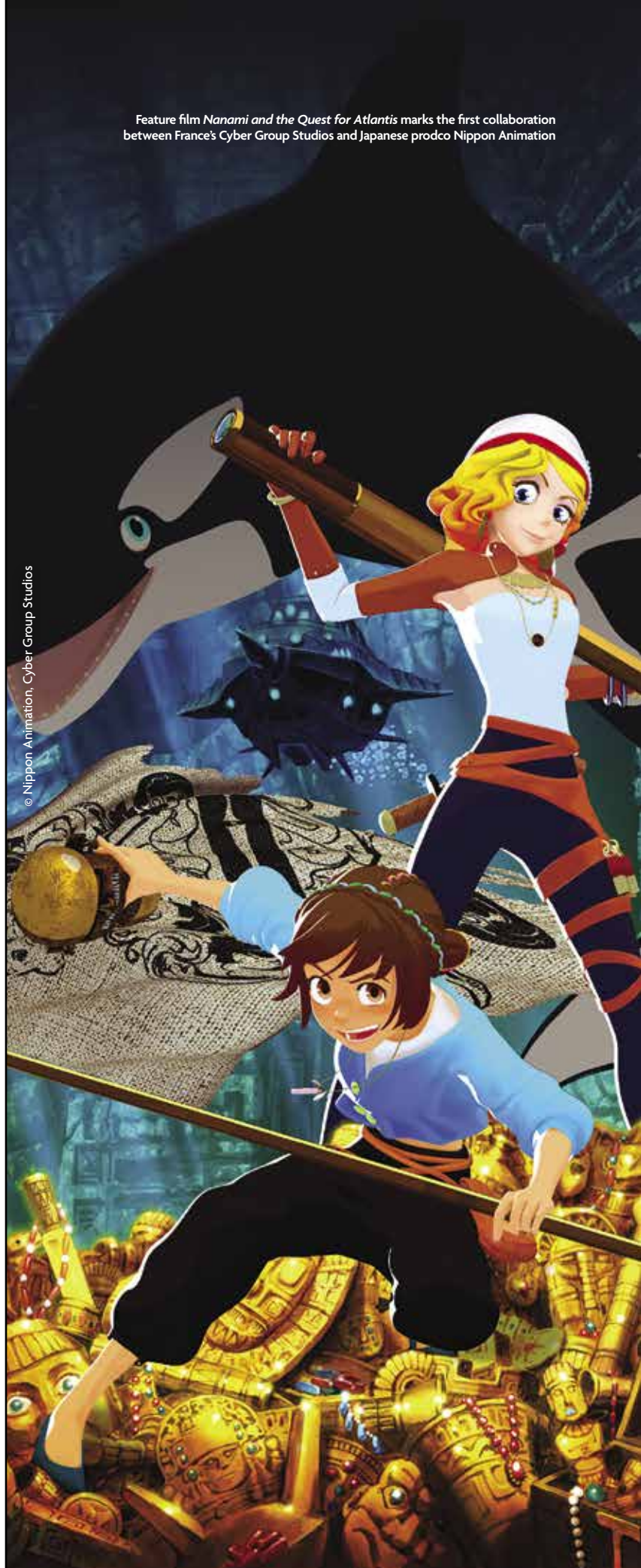
Aside from getting Japanese linear nets on board, new original anime co-pros will face a number of additional challenges. The biggest, according to Ayugai, is the language issue.

"Most Japanese artists don't speak English, and when characters speak in Japanese, not only is the sentence structure very different from other languages, but so are the accent points," he explains. "Because the spoken words are different, the emotion in the animation is, too." Fortunately, studios are now making a concerted effort to find more English-speaking production staff to help with translation, according to Hickey.

Another hurdle is that Japanese development and production is radically different from how things are done in the West, says Ayugai. In particular, the scripting-to-storyboarding stage is very fluid in Japan until the final picture, whereas Western culture has a much more rigorous step-by-step approval process. "Japanese prodcos often tend to hold work until they think it's ready—then when they show it, it might not be what you wanted," he says.

Hickey agrees that the creative checkpoints usually written into contracts in the US don't necessarily apply in Japan.

Feature film *Nanami and the Quest for Atlantis* marks the first collaboration between France's Cyber Group Studios and Japanese prodco Nippon Animation



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New original anime series *Kaina of the Great Snow Sea* will premiere on Crunchyroll in January 2023



Courtesy of Crunchyroll

"This could be a major roadblock, and quite frustrating for an international co-pro partner," he says.

Another major issue is that many Japanese artists still prefer hand-drawn techniques. "I love this, but it is really inefficient," says Hickey. "It poses serious compatibility issues with the way you will be working with a US producer, for example, and it's very hard if you have to make changes during development and production. If you are talking about high-volume series production, you want all of it to be digital."

Hickey also notes that a lot of Japanese anime series use *kisho-tenketsu*, a classic four-act narrative structure that's very different from the three-act hero's journey model developed by American writer Joseph Campbell and commonly used in the US and Europe. "I think there is enormous potential to figure out how to merge both storytelling structures, but these are the difficulties you are up against from a creative point of view," he says.

FUTURE FORECAST

Moving forward, Hickey wants to see Japanese studios get more adventurous with the development process because the majority of anime is adapted from manga or video games.

"In Japan, only about 5% of purely original production is for anime TV series," he says. "And with the Japanese consortium model [a long-held system whereby multiple partners including TV networks, toyco's, publishers and other media companies invest in entertainment projects as a collective], you often have too many cooks in the kitchen weighing in creatively, which is stifling and diminishes risk. There needs to be another development model for people who aren't manga artists."

For Ayugai, since Japan has manga for every demographic and most shows are manga-based, the domestic market is already at the saturation point. "I'm not exactly sure how many manga series are currently being made in Japan, but we estimate it is more than 200 per year," he says. "A healthier

number is probably around 120 so that everyone can make a little bit of money, and we do need that international revenue coming in."

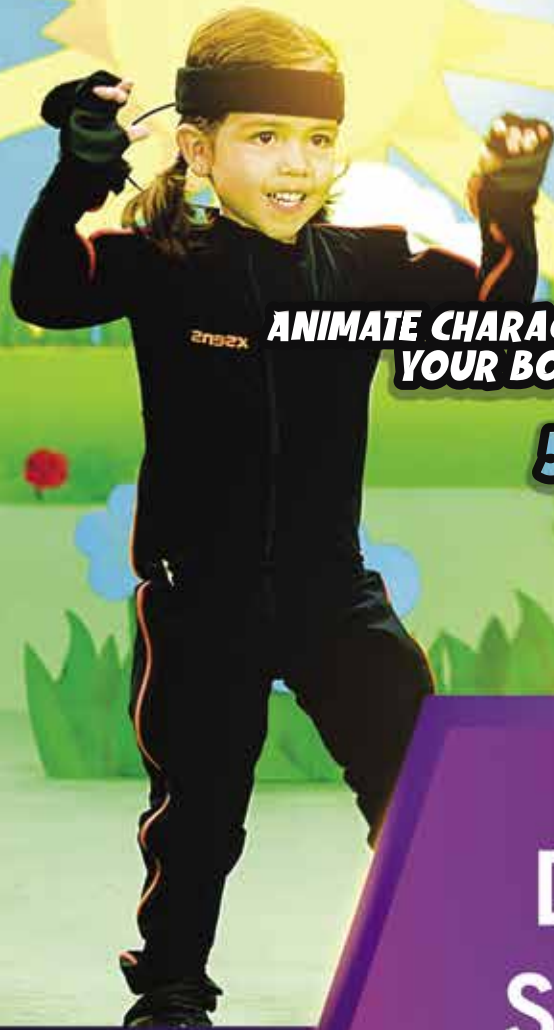
With so many manga series in production, Ayugai says Japanese studios are booked up for at least the next two years, which could be a problem for international co-pro growth. "They don't have pipelines to do any other animation unless they can miraculously find some out-of-work animators who have left other studios in Japan," he says.

Ayugai predicts the industry won't see a new crop of hybrid anime co-pros actually launch until 2025, but adds that achieving popularity in Japan will require a mindset change among Japanese audiences. "Unless there is a major cultural shift in the next two or three years to recognize true authentic co-pros, I don't see Japan accepting international content as much as people might like," he says.

McCollum has a rosier outlook for Crunchyroll's global business. After lowering the price of the service in nearly 100 territories in July, Crunchyroll saw higher engagement and strong, steady growth in both subscribers and viewing in India, the UK, Latin America and the Middle East.

"Our fans are hungry for localized anime, particularly as a result of a first wave of series we made available on our platform this year, fully dubbed and subtitled in Hindi, Italian, Arabic and Castilian Spanish," says McCollum. "The biggest challenge is keeping up with consumer demand. Our fans want new content at the speed of Japan, so we do our best to share anime localized in 10 languages, day-and-date with Japanese premieres."

McCollum also agrees that there's space for new types of hybrid anime shows for kids. "Anime is such a dynamic medium that lends itself to a variety of stories and genres," he says. "We're also seeing continued advancements in computer-generated animation, so the sky's the limit with the types of stories that can be told to resonate with audiences around the globe." **K**



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ANIME. EXPORTED

With global interest in the genre continuing to soar, local producers and buyers are taking note.

BY: SADHANA BHARANIDHARAN

While anime is very deeply and distinctly Japanese in origin, its exploding popularity means that, in many ways, it now belongs to the world. But when you take the anime out of Japan, is it still anime? Does it work when it's adapted to stories from other cultures? Or, to start with a simpler query, why are we all so interested?

With reports estimating the genre's market worth in the billions—and global appetites only growing—these questions deserve some exploration.

Uttam Pal Singh, head of kids for Warner Bros. Discovery in South Asia, says the versatility of anime's tropes make it widely accessible across different demographics, cultures and geographies. "We've observed that the popular shōnen [boy] anime, in particular, appeals to a wider Indian audience, including kids," he says, referring to the sub-genre that blends themes of friendship, action, comedy and science fiction.

India's relationship with anime can be traced back to 1993's *Ramayana: The Legend of Prince Rama*, a feature film adapted from an ancient Indian epic. It was produced and animated by Japan's Nippon Ramayana Film and financed by Tokyo's TEM, the IP's current rights holder. *Ramayana* is an early example of true cross-cultural storytelling—a creative team in India prepared

Squarefish/Dadal Animation co-pro *Mekka Nikki* is based on a French comic and mixes European and Japanese design

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Rorisang & The Gurlz, from South Africa's Cabblow Studios, uses anime to help tell broader emotional stories

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the script and storyboards, while a team in Japan handled animation and brought the story to life.

This collaborative process helped ensure that all aspects—including the traditions, attire, customs and architecture in the film—depicted Indian culture, while still retaining the defining look of anime.

Anime's place in India was cemented when Cartoon Network's Toonami programming block brought series such as *Dragon Ball Z*, *Cardcaptors* and *Beyblade* to local audiences, building a fan base that was later picked up by Animax, an anime-dedicated linear channel launched by Sony Pictures Entertainment in 2004.

But there's more room for anime to grow in India and develop a homegrown style, says Pal Singh, adding that he's interested in local, anime-based stories for Cartoon Network, POGO and Discovery Kids. "We would love to bring an amalgamation of Indian storytelling in the anime genre to our audience and reconnect with the new generation by presenting timeless stories," he says.

The scenario is similar in South Africa, where the genre has captured the interest of Kabelo Maaka, creative director of Cabblow Studios. "Anime gets to tell playful stories for kids that are brightly colored, fun and wacky. But it also gets to tell serious stories with maybe heavier issues," she says. "It gets to cover the full spectrum. That kind of approach to animation is quite freeing, and it's the way that we approach our projects."

Cabblow has two anime-inspired series in the works—*The Mom & Daughter Clean Up Crew* (26 x 24 minutes) and *Rorisang & The Gurlz* (22-minute episodes, volume pending).

While *Clean Up Crew* targets a girl-skewing audience ages eight and up, it is also designed for family viewing. The series is about a mother-and-daughter duo who have the ability to make people switch bodies—and in the process, learn empathy. "They don't save the day; they save relationships," Maaka says.

Using anime allows for a broad tonal range in the series, from the wacky humor of the premise to the more in-depth emotions of relationship conflicts, she notes, adding that the daughter has a bright red afro, while the mother has purple eyes and hair—visual choices inspired by the strikingly colorful wardrobes and hairstyles often seen in anime. "Somebody will just casually have pink eyes, pink eyebrows and pink hair, and it's fine," Maaka notes. "It's totally normal in the story world of anime."

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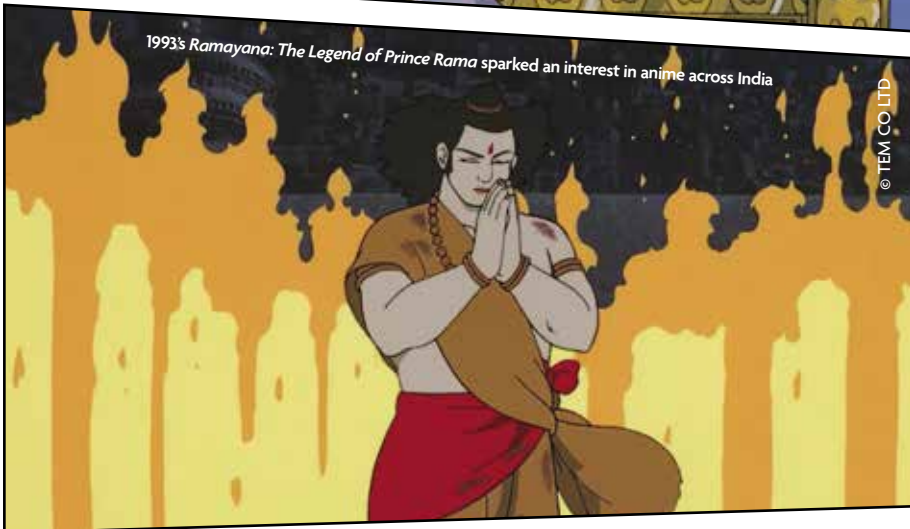




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1993's *Ramayana: The Legend of Prince Rama* sparked an interest in anime across India

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Meanwhile, *Rorisang & The Gurlz* is a musical series aimed at tweens and teens, centering on a high school K-pop superfan who starts an Afro-pop band with her best friends. The only problem? The regressive choir mistress at their all-girls school is disdainful of pop music.

Such “slice of life” stories about the daily lives of students are common in anime. Afro-pop music accompanies the visuals, bringing a blend of cultures to the show’s storytelling.

Over in Europe, one prodco currently exploring anime is Belgium-based Squarefish, which conceived *Mekka Nikki* (10 x 30 minutes) and set it up as a co-pro with French studio Dada! Animation. “It’s really interesting how we can mix the European feeling with the design and techniques from Japan,” says Squarefish co-founder Valentin Grégoire.

Aimed at a 12-plus audience, *Mekka Nikki* is a 2D/CG-animated adaptation of a same-name French comic book series by Exaheva and Félix Laurent. The authors were influenced by manga style, and the TV series retains the same look, says Grégoire. Set in a distant galaxy, *Mekka Nikki* tells the story of a rebellious teenager who must defeat a tech-savvy tyrant named Mekka. Her journey to find the cure for a mysterious disease is complicated when she falls in love with a cyborg girl who works for Mekka.

The advancement of animation technology has played a role in drawing more international studios and artists to the challenge of creating content around this style, notes Grégoire. “Traditionally, anime in Japan was made on paper by very efficient artists,” he says. “Now, you have software like TVPaint and Toon Boom Harmony that speeds up the process.”

That accessibility also extends to audiences. In the past, Indian viewers could only watch anime in Japanese with English subtitles or dubbed in English, but kids channels are actively making an effort these days to add more dubbing in some of India’s 100-plus regional languages, notes Pal Singh. In May 2022, for instance, Cartoon Network launched *Dragon Ball Super* in three regional languages: Hindi, Telugu and Tamil.

Similarly, Cabbrow’s Maaka points to the creative potential of “the African perspective and the African voice” in anime. Animation in general is experiencing a boom on the continent, and she has observed anime’s influence on younger animators in a popular local Facebook group dedicated to the craft. “Every now and then, you’ll see a high schooler or a recent graduate saying something like, ‘I want to make my own African anime.’ It’s a sentiment that I can appreciate,” she says. **K**

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MANGA MANIA



The Japanese graphic novel genre is riding a wave of heightened popularity, generating new content for anime and fresh trends and opportunities in consumer products.

BY: COLE WATSON

Underpinning the massively popular anime industry is an even more popular industry that feeds it—Japanese graphic novels, commonly known as manga. And manga is hotter than ever.

Action-fantasy powerhouse *Demon Slayer*, animal romance *Beastars* and comedy series *Spy X Family* all originated as manga. And while it has been massively successful in foreign markets for nearly two decades, manga is really flourishing in North America right now, with US-based publishers such as VIZ Media and Square Enix Manga reporting that sales in the region have more than doubled in the last two years.

Manga is now the number-one graphic novel format in North America, beating the likes of Marvel and DC Comics on their home turf. In a February 2022 report, the NPD Group noted that manga was responsible for one-quarter of all growth in the US book market in 2021, and the publishing category's annual sales were up by US\$218 million year over year.

Several factors are at play that have helped Japanese graphic novels skyrocket to these new heights, according to Masaaki Shimizu, GM and publisher of Square Enix's manga and books imprint. "The driver behind the unprecedented growth for manga is a chain-reaction effect, triggered during the early stage of the pandemic and amplified throughout it," he says. "It began with major video streaming services experiencing a surge in their subscriber numbers, which led to anime gaining more and more attention, and increased consumer interest in the original manga series."

When physical stores began reopening in 2021, major book retailers such as Barnes & Noble and Books-A-Million started dedicating more shelf space to manga, while independent bookstores, comic book shops and even retail giants like Walmart and Target began carrying manga titles for the first time, adds Shimizu.

Despite being a new competitor in the market, Square Enix Manga has experienced growth each year since it was founded in 2019, driven by titles such as action-fantasy saga *Soul Eater: The Perfect Edition*, wholesome slice-of-life series *A Man and His Cat* and the LGBTQ+-targeted *I Think Our Son Is Gay*.

In its first year alone, Square Enix released 24 manga titles and five tie-in books based on video games. Its annual output has expanded significantly since—the imprint currently has 59 publications expected to drop by the end of 2022.

Meanwhile, the largest manga publisher in North America, VIZ Media, continues to hold steady, publishing



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Initially self-published
by author Umi Sakurai
as a web comic, *A
Man and His Cat* has
since been adapted as
a magazine manga by
Square Enix, imported
to North America
by Penguin Random
House, and developed
for TV by Crunchyroll



Set in a fictional Death City, *Soul Eater* is a manga, anime and video game series licensed for distribution in North America by Square Enix Manga



between 300 and 325 volumes a year. Founded in 1986 and owned by Japanese publishers Shueisha and Shogakukan, VIZ publishes six of the fastest-growing manga series in North America, according to the NPD Group's February 2022 report.

In addition to *Demon Slayer*, these titles include long-running graphic novel series such as *Jujutsu Kaisen*, *My Hero Academia*, *Promised Neverland* and several horror graphic novels created by author Junji Ito. Each of these series has spawned an anime series that is currently airing on a streaming platform; and another—dark fantasy *Chainsaw Man*—is set to premiere on Crunchyroll in October.

While an anime adaptation launch or announcement can result in huge sales spikes for the company's manga titles, it isn't required for a publishing rollout in North America, says Kevin Hamric, VIZ's VP of publishing sales.

"Manga just needs to have a good story and good art," Hamric tells *Kidscreen*. "We have the luxury of being owned by the two largest publishers in Japan, so we get to see how a manga performs there and what kind of success it has, but it also has to be able to be translated and understood in English. There are many manga series that we do not bring over or translate because they wouldn't work in a Western setting."

Manga is no longer a niche category in North America like it was in the early 2000s, adds Hamric. "Manga is mainstream now—it's a mass-market category," he says.

Tencent Kids Originals





YoRHa: Pearl Harbor Descent Record is a manga in the dystopian-future genre, written by video game writer and director Yoko Taro



“People who grew up with manga, hearing from mom and dad that it’s taboo, now have kids of their own. So now they’re very accepting of it and encourage their kids to read it as well.”

To increase the accessibility of its titles, VIZ launched a digital Shonen Jump subscription service in 2018 for US\$1.99 per month. The platform features more than 15,000 manga chapters that readers can download, ranging from long-running series such as 1987’s *Jojo’s Bizarre Adventure* and pirate-themed *One Piece*, to titles that have yet to be released in print in North America, such as four-panel comic strip *Lucky Star* and sci-fi comedy *Agravity Boys*.

Hamric says this is the most economical way for newbies to get into reading manga for the first time. And for experienced readers, the benefit of the subscription is the ability to access day-and-date releases of newly translated chapters in sync with their Japanese launches.

While it took manga nearly two decades to become a mainstream category, an emerging trend in the graphic novel industry is the rapid adoption of webtoons and Korean graphic novels known as manhwa.

LA-based digital manhwa publisher WEBTOON reported a global user count of 82 million readers in January—an increase of 10 million since the company’s last tally in 2020, according to Statista.

Looking to tap into the budding success of WEBTOON’s online platform, New York’s Surge Licensing inked a deal with the publisher this year to develop brand licensing strategies and design new licensing and merchandise programs for its original IPs in North America.

Many of WEBTOON’s titles aren’t associated with an anime or live-action series adaptation, but the size and feedback of the manhwa community means there’s enough potential to support diverse CP programs, says Elan Freedman, Surge’s entertainment brand strategist.

“We’re always looking at chatter—whatever we can scour from our own data—and what we’re seeing online and at conventions,” Freedman adds. “And the beauty of WEBTOON being a primarily app-based business is that you can create a dialogue [with fans] and learn a lot about what your audience wants.”

Surge will target three core pillars as it maps out CP programs for the publisher: fashion, home goods and toys. Freedman says it’s an exciting opportunity for the licensing agency because of the potential to develop new, untapped audiences for the genre.

“Compared to the rest of the anime and manga world, what makes WEBTOON so unique is its Gen Z audience,” he notes. “Seventy-five percent of our viewers are 12 to 24 years old, and the platform has a massive female audience, which traditionally has not been served in this space.”

Manga’s ability to continue to spawn sub-genres geared to new audiences is a good indicator of its staying power. And where there is original content to be made, there is opportunity to be had. **K**

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A black and white photograph of a woman with long dark hair, seen from the side, holding a white coffee cup. In the foreground, a tablet is lying on a dark surface. The background is slightly blurred.

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COOL NEW SHOWS FOCUS ON ANIME

As anime continues to enjoy a surge in popularity, studios around the world are banking on its unique style to give their projects a distinctive and appealing look, as well as turning to manga—the graphic novel style that inspired the anime genre—to attract existing fans of well-established publishing brands. Here's a look at five new projects with this origin story that are currently in development.

BY: RYAN TUCHOW



Dreamland

Demo: YA

Co-producers: Dupuis Edition & Audiovisuel (France), Chouette Compagnie (France)

Style: 2D animation

Format: 10 x 22 minutes

Budget: US\$5.1 million

Status: Scheduled to start production in October, with scripts for four episodes written, and a bible and trailer available. *Dreamland* is already lined up to air in France on Anime Digital Network, and its partners are seeking international broadcasters.

Delivery: Q4 2023/Q1 2024

Based on a same-name French manga by Reno Lemaire that's published by Pika Édition, this fantasy series centers around an apathetic teen, scarred by his mother's death, who unlocks the power to explore the world of dreams and nightmares. While he sleeps, Terrence explores Dreamland with new friends, and discovers the strength to confront his pain and fears.



Biguden

Demo: Six to nine

Co-producers: Apaches (France), Cosmic Productions (France), Mr Loyal (France)

Style: 2D and 3D animation

Format: 52 x 11 minutes

Budget: US\$200,000 per episode

Status: A bible, script and animatic will be available in October, and the partners are seeking broadcasters, distributors and investors.

Delivery: 18 months after financing is secured.

When a young girl arrives in a village, mythical creatures that were thought to be extinct come back to life. Biguden has lost all of her memories, but with the help of friends—and her own half-human, half-magical lineage—she works to keep the peace between humans and all manner of peculiar beings. This adventure-comedy concept is adapted from a book by Stan Silas (author of the Norman graphic novel series).



Ki & Hi

Demo: Six to nine

Co-producers: Drawsome (France), Method Animation (France)

Style: 2D animation

Format: 52 x 13 minutes

Budget: US\$8.1 million

Status: A bible and two scripts are completed, along with a two-minute teaser animated by Ireland's Kavaleer Productions. Drawsome and Method are currently on the hunt for broadcasters.

Delivery: September 2024

An adaptation of a French manga collaboration between YouTuber Kevin Tran (5.4 million subscribers) and artist Fanny Antigny, this series is about two reckless brothers locked in an epic sibling rivalry. From squabbles to love, the show will explore the universal experience of having a sibling you don't always get along with, but never stop loving. Writer Thomas Krajewski (*Buddy Thunderstruck*) is developing and producing the series with Tran through his prodco (Drawsome), with Macha Uziel-Jardin (*Steampunk Explorers*) also on board as a screenwriter.



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Zoey Oceans

Demo: Six to nine

Producer: Studio Kimchi (Spain)

Style: 2D and cutout stop-motion animation

Format: 26 x 13 minutes

Budget: US\$2.7 million to US\$3 million

Status: A bible, several animation tests, a pilot episode script, treatments for two episodes and six synopses are available, and Studio Kimchi is seeking broadcasters, distributors and co-producers.

Delivery: 2026 to 2027

Five years after her father's ship is lost at sea, a young girl embarks on a worldwide search for him. But her only guide is a trail of rubber duckies that were also on the boat and have floated away on the ocean currents. In every episode, Zoey pilots a ship she made herself to follow the ducks far and wide, gathering clues about where her dad might be—and never giving up.



The Tern

Demo: 12 and up

Producer: Cyber Group Studios (France)

Style: 2D animation

Format: 10 x 26 minutes

Budget: US\$8.2 million

Status: A bible, teaser, two scripts and an animatic (the first five minutes of the pilot) are available. Cyber Group is seeking broadcasters and a publisher to release a prequel story for this adventure series.

Delivery: Q4 2024

After toxic clouds destroy the atmosphere on Earth, a group of human survivors have been living a floating existence in a fleet of dirigibles for five generations—until a group of teens receive a message from someone on the planet below. No longer content to stay on the ship, they break all kinds of rules to seek out the truth behind a massive conspiracy. Tony Valente, creator of French manga *Radiant*, is the show's character designer. **K**



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WHO KNEW?



Warner Bros. Discovery's **Zia Sands** takes a break from content negotiation with...

YOGA!



For Zia Sands, kids & family acquisitions, partnerships and co-productions lead at Warner Bros. Discovery EMEA, yoga started out as a family affair. As a tween and teen, she began practising with her mother and grandmother, developing a lifelong love of the ancient Hindu discipline.

"Maybe it's in my genes," says UK-based Sands with a smile as she recalls going to yoga classes during visits with her grandmother in the US.

"It was a nice shared experience—a way to spend time with my grandma, sitting next to her in a class full of people a lot older than me, seeing them moving as best they could into their 70s and 80s and thinking, 'Wow, that's really amazing.' Because of that, I'm pretty determined to stay physically active and healthy for as long as I can, and yoga is just one of the things I do to help achieve that."

She rediscovered her love of yoga as a young professional. Then, wanting to deepen her practice and share the benefits with others, she started training as an instructor—graduating just as the pandemic hit. In lockdown and working from home, she turned to yoga as a way to offer her colleagues

a break in their day. She had already found willing students at work as she was completing her certification, and during lockdown, those same people started reaching out asking for virtual classes. Word got around, and soon she had peers from all over the world tuning in to Teams or Zoom every week for Yoga with Zia.

Today, she continues to teach weekly virtual classes, as well as private sessions on the side. Trained in the Vinyasa Flow and Hatha disciplines, her classes are aimed at all levels. "It's so lovely introducing yoga to people who haven't done it before, being a helpful guide, sharing it with people, and seeing them come out of class a bit more relaxed, standing a bit straighter and breathing a bit more deeply," she says.

"When we're working in this hybrid environment, it's really nice to carve out time in your day to take a break, because there isn't really that divide between home and work. Life is hectic and full of all sorts of challenges. These are difficult times for a lot of people, and just allowing themselves that small amount of time can, I hope, make a difference." —Janet Lees

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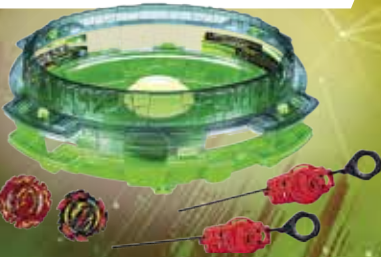
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