

Latin America and the Global Children's Media Market



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Latin American Creativity in a Globalized World

- Diversity of creative professionals - Filmmakers, producers, animators, writers, musicians, etc.
- Amazing diversity of cultures, styles, techniques
- Producer of internationally recognized advertising campaigns
- High level of expertise in using animation in commercials



Latin American Creativity...

- Contemporary Latin American cinema (Mexico, Argentina, Brazil, etc.) reaching broader international audience
- Telenovelas, including kids telenovelas, continue to be successful in Spanish- and Portuguese-speaking world and beyond



The Challenge

- U.S. and Japanese productions still dominate the airwaves for children in Latin America
- No Latin American children's series has been successful on a global scale
- Latin America has the ingredients to become a player in in the global kids programming market



Global Market Realities

- Need sales in major markets to make it
- U.S., U.K., France, Germany, Canada, Japan - and this is harder than ever.
Co-productions are a necessity.
- Requires network of contacts, ability to tailor concepts for a particular market/b'caster, strong distribution capability



Global Market Realities

- Markets such as the U.S. and the U.K. are not open to dubbed/"foreign" programming
- Animation travels better than live-action, and lends itself to creation of ancillary products



Global Market Realities

- Gov't incentives and subsidies play big role in financing of kids projects in major markets such as France and Canada, as well as developing markets, such as Singapore and Korea
- Supply of children's programming on the international market greatly surpasses demand



The Strength of Greater Spanish- and Portuguese-speaking world

- Market defined by shared languages rather than national borders
 - Latin America is part of growing “region” including Spain, Portugal, U.S. Hispanic market
 - 358 million native Spanish speakers worldwide vs. 341 million native English speakers; 176 million native Portuguese speakers
- Source: 1999 World Almanac/S.I.L. International



Latin America – State of Kids Programming Market

- Pan-regional kids channels are coming of age, mainly with dubbed programming produced by strong parent companies or acquisitions
- Local kids production is done by terrestrial broadcasters for national markets - Mexico, Brazil, Colombia, Chile, Venezuela, etc.
- Independent production is developing



Spain - European Gateway for Latin America

- Cultural affinity exists. Spain is already a regular co-producer with Latin America of films and documentaries.
- Spain is #2 animation producer in Europe in terms of hours behind France
- Spanish companies are recognized for their creativity and have a proven track record in co-production of animation in Europe: Icon Animation, Neptuno, Cromosoma (Barcelona); Zinkia, BRB (Madrid)



U.S. Hispanic market & Latin America

- 37.4 million Hispanics in the USA, or more than one in every eight people
- Fastest growing segment of the U.S. population, with immigration accounting for half of growth
- No single “Hispanic” identity – complex mix of cultures, language usage, generations
- U.S. Hispanic youth live in a vibrant bicultural/multicultural media world

Source: U.S.Census Bureau, Annual Demographic Supplement to the March 2002 Current Population Survey



U.S. Hispanic Market...

- Latin America is already established supplier of programming to outlets such as Univision, Telemundo, Sorpresa
- Production of original U.S. children's programming with Latino emphasis increasing
 - “Maya and Miguel” - Scholastic/PBS
 - “Dora the Explorer” - Nickelodeon
- In addition to supplying of programming, Latin America can co-produce for this growing market



“Pan-Latin” Kids Audience

- Growth of pan-regional kids channels has pushed development of original “pan-Latin” programming
- Regionalization of kids programming
 - “Teletubbies” - created regional live-action segments (Ragdoll - U.K., Discovery Kids Latin America, Nueva Imagen - Chile, Centauro - Colombia)



“Pan-Latin” Kids Audience

■ Discovery Kids Latin America

- “Eco-Aventura Amazônia” (Giros-Brazil)
- “La Ruta Quetzal” (Dos Mundos - Spain)
- “Desafio Todo Terreno” (Nueva Imagen - Chile, Civisa - Argentina)
- “Acesso Total” (HIP TV - Mexico, Idéia Produções - Brazil)
- “Mercurio” (HIP TV - Mexico)

■ “Plaza Sesamo” - Sesame Workshop

- Commissioning local animation across region



Latin America and Int'l Co-production

- Latin America as source of creative ideas for the world...
 - “Blast Off” / “Missão Astronauta” (Giros Produções - Brazil for Discovery Kids Latin America, U.S., Europe, Asia, India)
 - “Arctia” – animated feature film to be co-produced with Canada (Toolbox – Brazil)



Latin America and Int'l Co- Production

- Co-production is a financial necessity - nobody can go it alone today.
- More Latin Americans already working in international media market
- Exchange and synergy of know-how is key: creative, technological, business, legal



Animation Production Today

- Animation is a globalized industry, with development done across borders and production contracted out to countries with lower labor costs
- New business models and digital production techniques make production and distribution more accessible for smaller independent players



Animation Production – Asian Experience

- Asia continues to provide low-cost production alternatives, both in 2D and 3D animation.
- Korea alone has 100 animation studios, with rates from \$85K to \$185K per 30', vs. \$300K to over \$400K in U.S.
- Asian studios gaining more experience in development and pre-production
- India entering animation production market with rates up to 25% below rest of Asia



Latin America and Animation Production

- Latin America has creative talent to do pre-production work, such as character development and storyboards, for international projects
- Sector needs support to invest in technology and training
- Establish strategic alliances with Asian studios for co-production of original concepts and technical know-how.



Latin America - Producer of kids programming for global market

- Global vision is fundamental
- Government support and fiscal incentive programs are critical to support more production in region for children
- Alliances among producers which transcend national borders are key, both in the growing Spanish- and Portuguese-speaking world and beyond...