

## MIPTV Cannes, France 7–10 April 2014

Report by Maha Ismail, Marketing Executive; and Susan Wells, Investment Manager

MIPTV is held each April in Cannes and is the second biggest international television market in the world after MIPCOM.

Television executives and creative talent from all over the world converge to forge early-stage content development partnerships and seal international distribution deals for the year ahead.

Laurine Garaude of organiser Reed MIDEM, said there were 11,000 attendees at MIPTV 2014, including about 4,000 buyers (1,000 digital) from 100 countries.

MIPTV witnessed the continued development of high-end drama and formats from around the world, strong co-production activity, an emerging international market for online content creators – reflected in the inaugural MIP Digital Fronts – and a coming together of online and offline players.

In addition to the broad range of quality Australian content on offer this year, Australia was on a winning streak with Sydney-based company **The Feds** winning the **MIPFormats International Pitch Competition** and Brisbane-based Ludo Studios picking up this year's award for Digital Program: Fiction at the **International Digital Emmy® Awards** for **#7DaysLater** – a concept created by Daley Pearson and Nick Boshier.

**Tim Worner**, Chief Executive Officer, Seven West Media, was the recipient of a MIPTV Médaille d'Honneur recognising outstanding contributions to international television business.



## Trends

There were more digital platforms and multi-platform outcomes, a resurgence of lifestyle programming, and a growing demand for 'blue chip' wildlife and science programming. Echoing the findings of the MIP-commissioned Eurodata TV report, *One Television Year in the World*, Australian attendees also observed a growth in US drama series across multiple channels and platforms, and an increased demand for non-English language drama series.

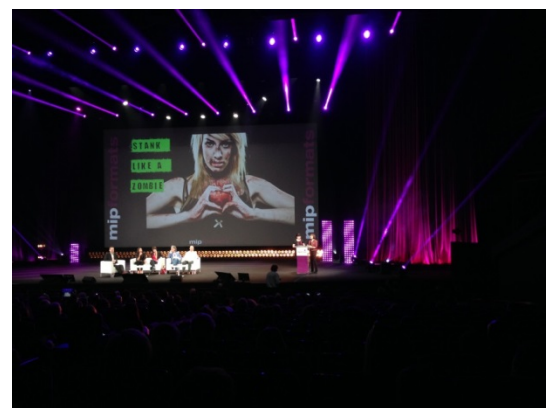
Direct outcomes for Australians doing business at MIPTV included several series commissions, at least seven series moving closer to financing, and a number of format and catalogue sales. A number of projects picked up international distributors. The most valuable longer-term outcome was relationship building with potential production partners, buyers and broadcasters.

## MIPFormats

Held over the two days before MIPTV, **MIPFormats** is the world's largest gathering for the formats community, bringing together big names, new talents and a variety of opportunities and tools for producers.

The Pitch Competition was open to creators and producers from around the world to present their new and original, non-scripted entertainment formats. The prize, sponsored by Warner Bros International Television Production, came with a €25,000 (AUD\$36,000) cash bursary earmarked for developing the winning format into a show.

**Lisa Gray** and **Claire Marshall** from **The Feds** pitched **Zombie Bootcamp** – a reality/game show in which two teams compete to see which would be best suited to survive the zombie apocalypse – to a theatre full of global television delegates. The team won hands down against strong international competition. The Feds are a recipient of **Screen Australia Enterprise** funding.



*Lisa Gray, Claire Marshall & Lizzy Nash from The Feds celebrating their win*

## International Digital Emmy® Awards

This year the awards ceremony for the **International Digital Emmy® Awards** took place during MIPTV's opening night party at the Martinez Hotel.

Australia's **#7DaysLater** – a concept created by Daley Pearson and Nick Boshier from the production company Ludo Studio – won this year's Digital Program: Fiction Emmy®. Daley Pearson notes:

“...we're having great chats about recreating our format internationally, we're seeing proof that international market value and not local production cost is the true value of a format.”

The project was financed through Screen Australia's Multi-platform Drama fund and the ABC, with development funding from Screen Queensland and Screen NSW.



*Daley Pearson accepting his International Digital Emmy® Award in Cannes and with Screen Australia's CEO Graeme Mason celebrating his win*

The nominees for Digital Program: Children & Young People included **Time Tremors**, an official co-production between Australia's **The People's Republic of Animation** and Canada's Xenophile Media. *Time Tremors* received funding through Screen Australia's Multi-platform Drama fund, the ABC and the Canadian Broadcasting Corporation.

## MIP Digital Fronts

The inaugural **MIP Digital Fronts** market is the first international digital content marketplace for original content produced for online audiences. At MIPTV 2014, the two-day program featured curated screenings from high-profile platforms, digital studios and online channels as well as post-screening interviews with the creative teams behind the content.

Brisbane-based **Hoodlum Entertainment** participated in the **Digital Studios Showcase**, where leading



digital studios from all over the world presented their best online original productions across all genres. **Nathan Mayfield**, Chief Creative Officer and co-founder of Hoodlum, presented *Secrets & Lies* (screened on the Ten Network and distributed by Cineflix) and its telling across television, online and social media. He added:

“One of the most exciting things is this is the first time a free-to-air network has commissioned a show from the outset to be a multi-platform show,” said Mayfield, who said Zeebox had been brought in at a very early stage in the project. “It has to be mainstream, it has to actually feel like this is not a new thing for our audiences to learn.”

## Digital Minds Summit

The MIPTV organisers described the Digital Minds Summit as ‘MIPTV’s closed-door educational executive think tank’ that brought together 60 digital media VIPs. They discussed Big Data, how to exploit it and the challenges of standing out among increased noise. Noted was the willingness of consumers to pay for content and to share personal data in exchange for personalised service, and the incapability of current analytics and marketing to combat churn and declining dollars.

## The business that used to be called ‘television’

*Building the New Digital Content Market* is a report from the organisers of MIPTV and MIPCOM, which draws on the insights of six digital strategists to address the commercial development of the online video market.

## Insights and trends

According to the MIP-commissioned Eurodata TV report, *One Television Year in the World*, in 2013, viewers around the world watched an average of 3 hours 14 minutes of television per day.

Over 70 territories were surveyed, including Australia, to identify the top 10 programs by genre in 2013, excluding sport:

- Fiction accounted for 42 per cent viewing, followed by entertainment at 37 per cent and factual at 21 per cent
- Series accounted for 61 per cent of fiction viewing, and telemovies 2 per cent
- Reality accounted for 36 per cent of entertainment viewing, followed by event viewing at 31 per cent
- In the factual category, most watched was news at 63 per cent, with documentary at 8 per cent
- Overall, fiction was up from 2012, entertainment down, and factual unchanged.

The same territories were surveyed to identify the top 10 programs by origin in 2013, excluding sport:

- Across all genres, national programming accounted for 79 per cent, followed by 9 per cent regional, 7 per cent imported and 5 per cent from the US

- Across fiction (excluding movies), national led at 71 per cent, followed by imported content at 15 per cent, and regional and US content at 7 per cent each
- Across imported fiction (excluding movies), Turkey led at 36 per cent, followed by the US at 32 per cent, South Korea 13 per cent, India and Brazil 5 per cent each and others, 9 per cent.

New US fiction series imposed themselves amongst the top annual audiences, including *The Blacklist* at number 10 in Australia. It was also noted that the US is developing more international partnerships.

A separate IHS TV Programming Intelligence report commissioned by MIP, *TV Programming Trends in 2014*, found that 'tough competitive conditions make for only moderate overall growth' in programming spend, with a 0 per cent rise in original content from 2013 forecast for 2014, and 5 per cent rise in acquired content. The ABC and SBS make up 23 per cent of spending, with none of the commercials rising above a 1 per cent spend growth rate. 'Foxtel is biting at the heels of the free-to-air broadcasters – it will spend \$563m this year, only 5 per cent less than Seven and more than ABC.'

At the centre of a format market revival were five Turkish fiction series, including *The End*, which sold to 35 countries, and has seen format deals via Netflix translate into a number of local adaptations.

## Meetings with sales agents/distributors

In order to be eligible for Screen Australia production investment all television projects must have a ROW sales agent attached.

The quality and value of Australian television content has been proven over the past few years and international sales agents are hungry for more Australian drama with international appeal. They are willing to contribute on average around 7 per cent of the total budget.

Two key international players for the Australian television industry are **All3Media** and **DCD Rights**. **Maartje Horchner** from **All3Media** noted that:

"Australian drama has made a significant leap in the last five years... a leap not only in terms that the international market appreciates it, but also the production quality which has really improved. The quality of the writing has improved. I can safely say that I value Australian drama on par with British dramas. And we are looking for more."

On the eve of MIPTV, All3Media sold Screentime's **Anzac Girls** to Globo/GNT Brazil and TV2 Denmark. Globo-owned GNT has also acquired Playmaker Media's **Love Child**. Both projects received production investment from Screen Australia. Explaining why she acquired these two programs **GNT** programming manager **Ana Caroline Lima** said:

"*Anzac Girls* and *Love Child* are aligned with GNT's strategy of bringing to the audience high-quality fiction... both Australian series will enhance the image GNT has been building since 2012 as a female-oriented channel..."





*The All3media stand featuring Anzac Girls and Love Child*

**DCD Rights** are selling at least 15 Australian titles in their current catalogue, including Playmaker Media's *The Code* (funded by Screen Australia), which they sold to **BBC Four**, whose Channel Editor, **Cassian Harrison**, noted:

"Following the success of *The Bridge II* and *Salamander*, both of which attracted audiences of over 1m an episode, I'm delighted to welcome another action-packed thriller to the channel, this time from the striking landscape of Australia – reinforcing BBC Four's reputation as the home of the best international drama."

**Sue Deeks**, BBC Head of Programme Acquisition, added:

"*The Code* is an intelligent and compelling thriller with a top-notch cast in a spectacular landscape – it has all of the ingredients that BBC Four viewers love."

DCD CEO **Nicky Davies Williams** and Head of Acquisitions, **Pilar Perez**, have been actively engaged with Australian producers over the past few years and most recently visited Australia in March 2014. On their first trip several years ago they acquired *The Slap*, *Rake* and *The Straits*.

Now some 80 per cent of DCD Rights' catalogue is made up of third party content that DCD Rights buy into; about a *third* of this new 'bought-in programming' originates in Australia. DCD often consider materials at treatment stage and are actively seeking new Australian content.

Some of the **general feedback** from sales agents/distributors included:

- It is important that Australian drama doesn't look 'cheap' and that it's not too domestic.
- Australian producers need to think beyond just satisfying the Australian network's needs for local content for local audiences – they need to work out how to engage both an Australian and an international audience.
- Australian drama is ordered too quickly by Australian networks and therefore there is not enough script development taking place.
- Australian 'biopics' have a very select market and tend not to travel well internationally.
- There is a gap in Australian producers' knowledge of the international market in general.

- Having at least one international cast attached to projects is clearly beneficial; however, some sales agents said that they are just as interested in a great concept, regardless of cast.
- Most companies prefer a minimum of six episodes, with a clear preference for eight to 10.



## Australians at MIPTV 2014

**Graeme Mason** (CEO), **Susan Wells** (Investment Manager, Drama) and **Maha Ismail** (Marketing Executive, TV & Online) attended the market on behalf of Screen Australia. Graeme, Susan and Maha met with distributors, potential international co-producers, broadcasters and financiers, supported local producers attending the market and hosted the Australian drinks function.

From available data, 52 Australian companies (with 105 individual representatives) attended MIPTV this year, including 25 production companies. Many used the Screen Australia stand as a base for doing business.

The majority of Australian producers attending brought expertise through factual, lifestyle and reality television, with drama following closely. They collectively took over 150 projects to market in various stages.

A large proportion of Australian attendees noted a quieter market, especially compared to MIPCOM, which is held in October in Cannes. Some considered this to be positive as it meant greater access to buyers, sellers and co-production partners and more productive, less rushed meetings. Others noted that less foot traffic made it challenging for those who had not scheduled a sufficient number of meetings ahead of the market.

The Screen Australia stand was comprised of nine meeting tables (two with screens), and provided free Wi-Fi, a reception and message service, two computers and a waiting area. Producers were able to book meetings at the tables in advance through the online booking system on the Screen Australia website, and over 200 meetings took place across the week.

A showreel highlighting 13 recent documentary, drama and children's titles with Screen Australia investment played on two screens at the stand.

Screen Australia produced a number of publications that were available at the stand:

- [Australia at MIPTV 2014](#) – directory of 46 Australian companies doing business at MIPTV

- [Australian Documentaries 2014](#) – listing of 65 new titles with Screen Australia investment
- [Doing Business with Australia](#) – A guide to the Producer Offset and Co-production.

## Post-market feedback from Australians at MIPTV

A call for industry feedback after the market saw 30 companies respond out of 46 at MIPTV. 97 per cent of respondents visited the Screen Australia stand. 80 per cent of visitors to the stand used it principally for meetings. 53 per cent of respondents pre-booked meetings using the online booking form on our website.

Respondents indicated that they would like more info before the market, and a number were not aware of resources already available to help them prepare. These included access to the MIPTV database, which is granted upon registration to assist with meeting scheduling.

While a large proportion of respondents noted a quieter market, especially compared to MIPCOM, some considered this to be positive as it meant greater access to buyers, sellers and co-production partners and more productive, less rushed meetings. Some noted that less foot traffic made it problematic for those who had not scheduled a sufficient number of meetings ahead of the market.

Trends observed by the respondents included more digital platforms and multi-platform outcomes, a resurgence of lifestyle programming, and a growing demand for 'blue chip' wildlife and science programming. Echoing the findings of the MIP-commissioned Eurodata TV report, *One Television Year in the World*, respondents also observed a growth in US drama series across multiple channels and platforms, and an increased demand for non-English language drama series.

The respondents collectively took over 150 projects to market in various stages. Direct outcomes included several direct series commissions, at least seven series close to financing, and a number of format and catalogue sales. Some of the Australian respondents also picked up distributors.

Respondents noted that the most valuable longer-term outcome from attendance was relationship building with potential production partners, buyers and broadcasters.