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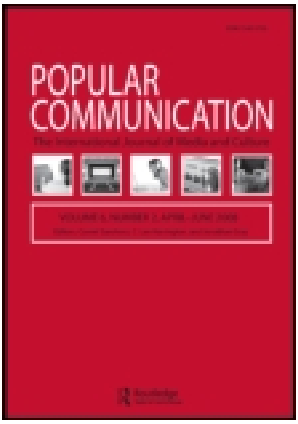

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Global TV 2010: Update of the World Market for Television

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Global TV 2010: Update of the World Market for Television

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Television's world market is a complex arena where the costly products of this vigorously profit-oriented culture industry are traded globally. Given that the ultimate success of a show that crosses borders is all but impossible to predict, the aim of our recent book *Global TV: Exporting Television and Culture in the World Market* (Bielby & Harrington, 2008) was to arrive at a better understanding of the organization and dynamics of the industry marketplace that sustains television's worldwide viewing audience. To that end, our research drew upon a middle-range theoretical approach to the industry's political economy in order to better align actual on-the-ground marketplace practices with the overall structure of its market. In our wide-ranging analysis of this arena, we identified key aspects of industry business practices that account for its robustness, and in this 2010 update we discuss how shifts in a pivotal financial underpinning — advertising revue — have affected the vitality of the industry. In this report, we offer further insight into the dynamics of this marketplace by describing the effect of the economic recession on the global television industry.

The highly lucrative world market for television did not escape the global financial crisis, and industry coverage of the business of television import/export at the start of 2009 revealed a keenly dispirited sense of where things were headed in the months to come. In April 2009, following MIPTV (one of the global television industry's four annual market conventions), industry participants were reportedly deep in "stock-taking" and "wondering-when-things-would-get better" mode (Daswani, 2009). In June came reports of "relief" following the Los Angeles Screenings' preview of new US shows, and in October distinctly qualified comments such as "resilient if not robust" and "quality if not quantity" represented observers' circumspect assessments of the marketplace following the Reed Midem Organization's annual MIPCOM convention (Guider, 2009; Leffler, 2009). The chief cause of these restrained appraisals of the state of the industry was 2009's double-digit decline in spending by advertisers that reduced or eliminated altogether the key source of revenue for production, although the decline was not uniform across global regions. Spending was weakest in North America, where it fell from 2008 levels by 15.9% and was reduced by 9.1% in Europe; on the other hand, it actually rose 2.2% in Asia (Pfanner, 2009, p. 1). An A.C. Nielsen report on *all* media (including print and new media) in 27 countries revealed that pivotal advertisers, which included the discretionary income products of automakers and financial institutions, cut back most sharply on spending, whereas the spending by retailers of goods from consumer product companies and health-care advertisers went at least unchanged from earlier levels (WorldScreen, October 7, 2009a). That said, television has been particularly hard hit. The United States experienced a 14.9% decline, Europe's commercial television market suffered somewhere between an 8% and a reported double-digit drop in advertising revenue, decimating the anchors of Europe's commercial television business — Britain's ITV, Germany's RTL, and France's TF-1 — and even the pan-European group ProSiebenSat.1 and Berlusconi's Mediaset empire have not gone untouched (Roxborough, 2009). In the United States, the upfront sale of advertising to the domestic cable networks was down 12% from 2008 to 2009 (Crupi, 2009).

Although the global television industry's 2009 first-quarter sales activity was pummeled, its second quarter revealed signs of stabilization. Even so, the industry's anticipated long and slow, but steady, recovery may take several years to return to pre-2008 levels (Crupi, 2009). This anticipated trajectory has, in turn, opened the door to significant efforts by the industry to redefine business strategies, a shift that has affected and can be expected to continue to affect audiences' viewing options. In the absence of a unifying global bureaucratic structure, a distinguishing feature of the industry that we discuss in *Global TV*, industry reporting from the four major television convention marketplaces best reveals the shifts in strategies that are underway for program production and content for the global market. As the key venue where domestic US programming is launched and syndicated locally and internationally, the National Association of

Television Program Executives (NATPE) is also where global buyers come to market their own programming. Telenovela productions are a substantial component of this convention's business because of the large Spanish-language market in and adjacent to the United States, and in 2012 NATPE will relocate to Miami after eight years in Las Vegas to be even more accessible to its key international buyers, in particular, those from Latin America. In the context of the global economic downturn, industry leaders at NATPE 2009 spoke of the vulnerability of the traditional domestic US market for syndicated programming, a situation brought on by the aging library of current syndicated programming and the lack of potentially strong replacements. In light of the need felt among buyers to cut costs, industry leaders anticipate the re-emergence of an early model of syndicated television program development, that is, localized origination based upon partnerships between stations and studios. "We will see [station] groups, especially sizable groups, look to do things locally," stated one industry spokesperson (Warner, quoted in Grego, 2009). Should a shift like this take place, it will decentralize the studios' control over program production and sales that overtook the syndication market a decade ago.

MIPCOM's 2009 October convention in Cannes was a notable improvement over its sister convention (MIPTV, April 2009) in terms of both attendance and sales. At both events, a key focus of discussion was proactive stances toward the future. At MIPTV that discussion targeted "new alliances to finance production, new channel strategies to consolidate their brand position in the international market and how they are thinking about monetizing the multiplatform potential of their content at the start of the creative process" (Brzoznowski, 2009; Leffler, 2009). At MIPCOM the conversation shifted slightly to emphasize co-productions, international channels, more varied product offerings, and the need to roll out shows in global markets as close to domestic air dates as possible, both to avoid piracy and to maximize or pool marketing costs (Guider, 2009). Perhaps the most notable shift in industry talk about program content in 2009 was the emergence of perceived pressure to produce less expensive programming. Locally produced scripted series are expensive for any domestic industry to produce and costly for buyers to purchase for their networks, and in view of the ad revenue downturn, clearly a less desirable form of program acquisition. Seeking to find cost-effective programming, MIPCOM discourse was dominated by the relative value of "entertainment" programming, which is shorthand for licensed and/or sold formats (Turner, 2009a). Relatedly, some Hollywood studios reported better than expected sales outcomes because of the downturn in expensive, locally produced dramas in other countries. "'Recession is good business for studios,' said [. . .] a senior distribution executive [because] 'what we do is still so much more efficient and low-cost than the cost of funding an original drama production, which in any case could still fail [. . .]"' (Turner, 2009b). That said, the United Kingdom remains the dominant exporter of formatted television (Turner, 2009c).

Another intriguing discussion of television content at MIPCOM focused on the need for feel-good programming in the context of the recession (Guider, 2009; Turner, 2009b). Explains Chris Grant, present of Shine International, "There are a lot of people who are struggling, and more than anything people want shows that give them the opportunity to feel they are not alone." Featured MIPCOM entertainer Joan Rivers concurs: "When you don't know if you're going to be working next week, of if your bank is going to stay open [. . .] you're glad to laugh" (both quoted in Turner, 2009b). Fox's musical dramedy *Glee*, one of the top shows traded at MIPCOM, certainly fits that bill, though it is a bit more difficult to understand how other hotly traded US products, such as comedian Jerry Seinfeld's new *Marriage Ref* (NBC) in which a rotating cast of celebrities serves as arbiters of real-life domestic squabbles, might reflect the new programming emphasis (or how long that emphasis will last).

Developments in the first few months of 2010, both in the US domestic market and the global syndication market, offer additional insight into where the industry might be headed. Domestically, ever-declining advertising revenue has decimated the daytime soap opera genre (long a money-maker on the global market; see Bielby & Harington, 2008), contributed to reduced primetime episode counts, generated a play-it-safe 2010 primetime pilot season (e.g., the resurrection of a number of 1970s-era programs), accelerated discussions about the need for more transmedia storytelling, and — most radically — revived talks about the possibility of broadcast networks transforming into cable channels (Adalian, 2010; Andreeva, 2010). Globally, the spotlight on US and Western European markets has dimmed a bit due to the slow pace of economic recovery, with expanding economies in Russia, Brazil, India, and China garnering increased attention from both buyers and sellers (Daswani, 2010). Moreover, the recent announcement that DISCOP[1] and NATPE are launching a new industry trade event in the Middle East has shed new light on that region as well (Guider, 2010).

Since the publication of *Global TV* and our comprehensive study of the world market for exported television (Bielby & Harrington, 2008), the global financial crisis has had, at least in our view, a not unexpected effect on the perennially unpredictable global television market. What has transpired since our study is that the landscape of this relentless global industry has undergone at least three adjustments: reduced spending on program development and acquisition; increased reliance on proven products, brands, and genres; and, although it may be too soon to tell with certainty, a resurgence of market dominance by the Hollywood studios. Each of these trends would be very useful to track as the world market for television continues its response to the global financial crisis. We note with particular interest, however, the relevance of these developments to two important matters of conceptual concern to media scholars. The first is that an increase in the creation and distribution of licensed formats as a cost-effective way to reach global buyers in a down economy may, in a circuitous way, offer national or regional markets a strengthened position when implementing local versions, thereby furthering opportunities to enhance expression of national identity pertinent to cultural policy. The second is that the global economic downturn, which has renewed financial incentives for producers to find cost-savings generated through co-production arrangements, has heightened the importance of intellectual property protection (Turner, 2009b). What this means for content providers as creative workers who are the originators of format concepts and not just the producers and distributors of those concepts is, of course, an important and related aspect of this matter.

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Breaking Ranks: Backdoor Workforces, Messy Workflows, and Craft Disaggregation

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The recession has accelerated production labor's alarming but seemingly inevitable "race to the bottom." The corporate goals fueling labor's steep dive are familiar: to achieve greater corporate flexibility and externalization of risk through labor outsourcing, multitasking, digitalization, ending long-term labor "entitlements," and disaggregating rational labor relations. The boardroom fantasy here imagines that companies can now cut through the multimedia, multichannel clutter with distinctive screen content but without the pesky obligation to maintain closely allied