

# Who's winning in the world of The New Television?

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TITLE ○

CONTENT ○

○ MARKET

○ TIME

○ PLATFORM

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# Introduction

## The proliferation of content and platforms

We may be in a golden age in terms of television content, but for those in the industry it is also an age of turmoil. Not only is the number of series growing, with over 1,400 primetime shows on television in 2015, the number of platforms where this content is available has also multiplied. Widespread internet access has enabled the growth of IPTV, where traditional television content is delivered via the internet instead of a cable or satellite, and the creation of many over-the-top services, where new players in the TV industry provide on-demand content to consumers directly. While these services carry shows found on broadcast and cable TV, they are also creating their own online-exclusive content, which ranges from candid, consumer-created YouTube videos to scripted, high-quality series airing on Netflix. The growth in content is not limited to online ventures: more than ever, cable and premium channels are airing popular, critically acclaimed series (think HBO's *Game of Thrones*, FX's *The Americans*, or Lifetime's *UnReal*).

With this glut of new services and content, consumers have an unprecedented number of choices. They can watch television content on TV (or smart TV) sets, desktop or laptop computers, tablets, or smartphones. They can watch shows on their own schedule: instead of being restricted to one episode a week at a specific day and time, people can record live TV on their DVRs, catch up online on past series that they missed during their first run, or binge-watch whole seasons in a day. They can watch the content that they want to watch, regardless of where it first aired. Wider and faster word-of-mouth spread through social media, powerful recommendation services from OTT providers, and popular yet illegal options such as P2P file-sharing means that barriers to discovering and acquiring content have been greatly reduced. **With the ability to watch what they want, where they want, and how they want, content consumers have become more powerful than ever, leaving content providers scrambling to catch up.**

# Introduction

## New television, new demand

In this brave new world, traditional definitions of television and demand for television are inadequate:

With consumers watching the show on many platforms at many times, in addition to expressing their demand through many new venues such as social media, blogs, etc. rather than just around the water cooler, new metrics of consumer demand have necessarily been developed, including Demand Expressions™ and Demand Rating™ by Parrot Analytics.

*This report will cover major trends in the industry and their implications for the future, as well as the current state of five major segments of the television industry in the United States: Broadcast, Cable, Premium Cable, SVOD, and AVOD.*

### “Television”

no longer means simply hour or half-hour content that consumers watch on a TV set, but now encompasses all short-form content viewed on any screen and delivered via any method.

### “Demand for television”

means how much people desire a specific piece of content. This definition has not changed, but the most common measure of this demand, the number of people who watched the show when it first aired, now only provides part of the story.



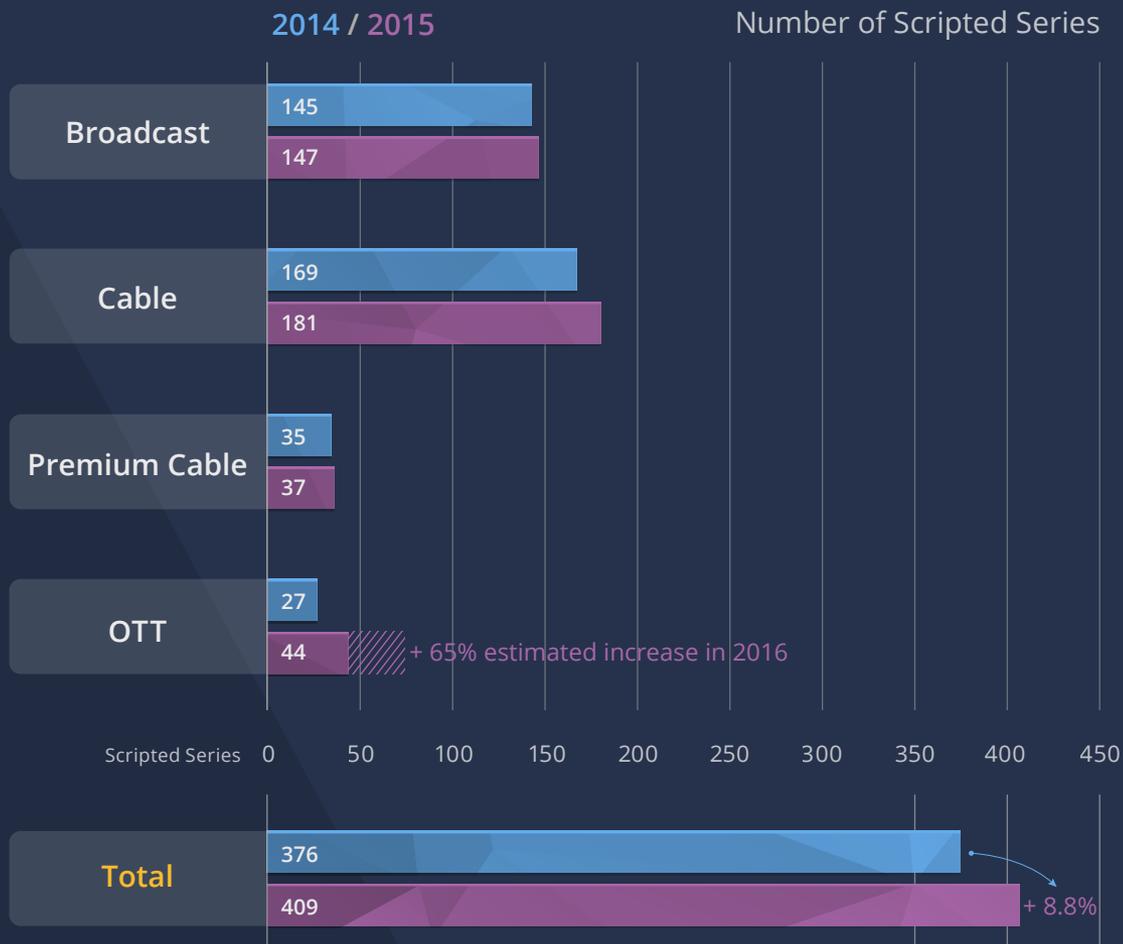
**Current Trends and  
Future Implications**

# Expansion and aggregation

## Shows and platforms compete for attention

As discussed previously, the television industry is currently experiencing a period of rapid expansion in terms of both content and platforms. The number of scripted series increased by 8.8% from 2014 to 2015; most of this growth can be attributed to the number of shows on OTT platforms increasing from 27 to 44. **We estimate that in 2016, the number of scripted digital original series will increase again by about 65% to be over 70 titles.** Linear television also shows no signs of slowing down, with HBO planning to release 50% more programming in 2016.

In addition to more content, there is now more platforms on which to watch it. Netflix, Hulu, and Amazon have established themselves as the major SVOD players in the United States, but they are challenged by new platforms, including those sponsored by traditional broadcasters (such as CBS's All Access) or focusing on a specific niche (such as Crunchyroll, a provider that specializes in anime titles). Globally, many markets have their own local OTT platforms alongside international offerings such as YouTube and Netflix. While few of these local platforms have original content, it is only a matter of time before they too start carrying exclusive content in order to attract subscribers.



# Expansion and aggregation

## Niche platforms may not find niche audiences

Despite this proliferation of platforms, there are hints that the industry is entering a phase of aggregation. Devices such as Apple TV allow consumers to access a variety of SVOD and AVOD platforms in one location, helping to manage the often overwhelming amount of choices available. A variety of minor SVOD services, such as those from Starz and Showtime, are now offered through Hulu and Amazon as add-on subscriptions. While these add-ons often have their own independent app, their availability on more popular platforms enables them to reach a much wider potential audience and allows users of the main platform to customize the types of shows they can watch without managing multiple services.

The expansion of content means that more titles targeted at niche audiences are created, but the parallel expansion of platforms means that the risk of this content not reaching its specific audience increases. With the multitude of platform and content choices, consumers may never find the content aimed at them or even know it exists. By combining with a more popular OTT service, the niche SVOD providers increase the size of their potential audience, increasing the chance that their content will

reach the right people. In the future, some of these niche services may cease offering their standalone app and exist purely as an add-on subscription to a larger platform.

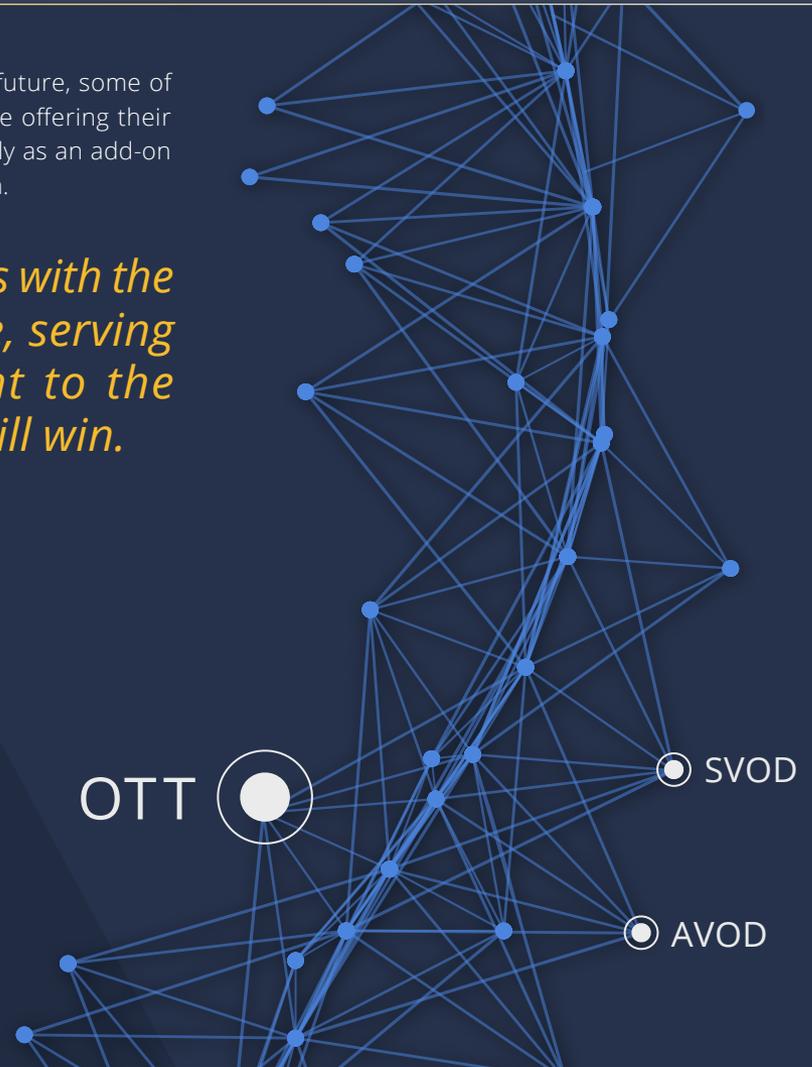
*The OTT platforms with the biggest user base, serving the right content to the right audience, will win.*

OTT



SVOD

AVOD



# Globalization of content

Any title, anytime, anywhere

## NETFLIX & Local OTT Platforms



Netflix is not yet available in China, Crimea, North Korea and Syria

With the rise of the internet, the world has become much smaller. Many facets of society have been affected by this trend, and television content is no exception. Consumers in Poland can watch American shows, consumers in the US can watch Korean reality shows, and consumers in Brazil can watch Scandinavian dramas, all easily available on TV channels or OTT platforms (or on file-sharing networks if there is no legal option). Linear television networks often air international content on specialty channels and market-specific OTT services can license any type of content that they believe will attract subscribers, regardless of the country of origin.

At the beginning of the year Netflix announced its expansion into 130 new markets, establishing itself in nearly every country in the world. It has become the first global SVOD platform with this expansion, though the exact library of content differs in each market depending on its licensing deals. It remains to be seen whether Netflix can dominate all markets like it has in the United States or whether the smaller SVOD platforms will be able to appeal more to the local market.

# Globalization of content

## Standing out in a world of global demand

IE & AU | Top 10 Shows

1st January – 30th June 2016 | Average Demand Rating™

| IRELAND |                     |       | AUSTRALIA |                                 |       |
|---------|---------------------|-------|-----------|---------------------------------|-------|
| 1       | Game Of Thrones     | 87.33 | 1         | Pretty Little Liars             | 86.05 |
| 2       | The Walking Dead    | 83.50 | 2         | Game Of Thrones                 | 83.97 |
| 3       | Making A Murderer   | 81.00 | 3         | The Walking Dead                | 83.16 |
| 4       | Pretty Little Liars | 78.56 | 4         | Teen Wolf                       | 77.21 |
| 5       | The Good Wife       | 76.89 | 5         | The Flash                       | 77.11 |
| 6       | Grey's Anatomy      | 76.86 | 6         | The Big Bang Theory             | 76.38 |
| 7       | Vikings             | 75.05 | 7         | Vikings                         | 76.27 |
| 8       | The Big Bang Theory | 73.91 | 8         | Keeping Up With The Kardashians | 76.07 |
| 9       | Fargo               | 73.40 | 9         | Once Upon A Time                | 75.32 |
| 10      | Gotham              | 73.10 | 10        | Grey's Anatomy                  | 74.69 |

While Ireland favors dark, violent stories such as *Making a Murderer* and *Fargo*, Australia prefers lighter titles such as *Teen Wolf* and *Keeping Up With The Kardashians*.

All platforms, both linear and OTT, will face challenges to remain relevant in a world of global content demand. A top priority for any platform or channel is to provide content that will be popular, but this task has become more challenging in the age of global content. Consumers are no longer content to just watch whatever is on the air; they now can choose between the myriad content available in their home market, or with only a little more effort, any content in the world. As a result, the pool of potential content is now much larger, making the job of content acquisition teams more difficult, yet more critically important than ever.

Content acquisition efforts will have to be market-specific, as consumers in different countries naturally have different content preferences. For example, cultural differences can be seen in the most popular titles from the last six months even between two English-speaking markets.

These market-specific preferences mean that even international platforms such as Netflix must curate the content available in each country; a one-size-fits-all approach will not be successful everywhere.

# Globalization of content

## Standing out in a world of global demand

In addition to having the right content in the right market, platforms must ensure that content is available at the right time. Generally, consumers want to watch shows as soon as they are available: one of Hulu's advantages is that it provides episodes soon after they air on linear TV, and international SVOD platforms advertise that they have "same-day" access to titles that have aired in the US. The fact that immediate access to content is available, through legal or illegal means, challenges existing revenue streams, which relies on providing the same content at different times; new revenue models must be developed to capitalize on this demand for immediacy.

To satisfy these new demands from consumers, the industry needs to change. Current data in international markets or for content on OTT platforms is often unavailable or difficult to compare to data in other markets or on other titles. New measurements must be general enough to allow demand for content to be compared across markets and across platforms so that effective content licensing and acquisition decisions can be made. To facilitate these

decisions, faster rights and licensing processes will also be developed. These new processes must allow content providers to find and license the right titles for their specific market, and move quickly enough to satisfy the consumers' need for immediate access. **Only by getting the right content, in the right market, at the right time, will linear and OTT platforms be able to keep up with global content demand.**





## **Broadcast Networks**

# Broadcast

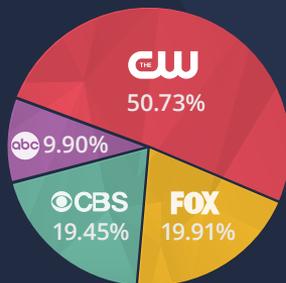
## The rise of the superheroes

In the last six months in the US, shows from the CW have done well in terms of demand: five out of the top ten broadcast series are from this channel, including *The Flash* as the most popular broadcast show. The second-most in-demand title, CBS's *The Big Bang Theory*, is the only comedy series in the top ten. Four of the five major broadcast networks are represented in the top ten: the CW has five titles, CBS and FOX have two, ABC has one, and NBC has none.

**Most of the top broadcast shows are not typical dramas.** Five out of the ten feature superheroes, two more — *Once Upon a Time* and *Supernatural* — also have fantasy elements, and *The 100* is a science-fiction series. Even *The Big Bang Theory* derives much of its humor from geek culture. The remaining show in the top ten — *Empire* — is also not a typical drama as it is a soap opera with a focus on hip hop music. Though these genres and subjects may have been considered niche interests in the past, clearly they now have become popular in the mainstream.

### US | Top 10 Titles

1<sup>st</sup> January – 30<sup>th</sup> June 2016 | Median Demand Expressions™



| Title                    | Median Demand Expressions™ | Channel | Also popular in |
|--------------------------|----------------------------|---------|-----------------|
| The Flash                | 17,564,615                 | The CW  | India           |
| The Big Bang Theory      | 14,248,963                 | CBS     | Czech Republic  |
| Gotham                   | 13,114,344                 | FOX     | Portugal        |
| DC's Legends of Tomorrow | 11,842,867                 | The CW  | Singapore       |
| Arrow                    | 11,300,199                 | The CW  | Brazil          |
| Once Upon a Time         | 11,120,211                 | ABC     | Israel          |
| Supergirl                | 10,001,532                 | CBS     | Philippines     |
| Supernatural             | 9,901,502                  | The CW  | Latvia          |
| Empire                   | 9,477,703                  | FOX     | Tanzania        |
| The 100                  | 9,078,494                  | The CW  | France          |

# Broadcast

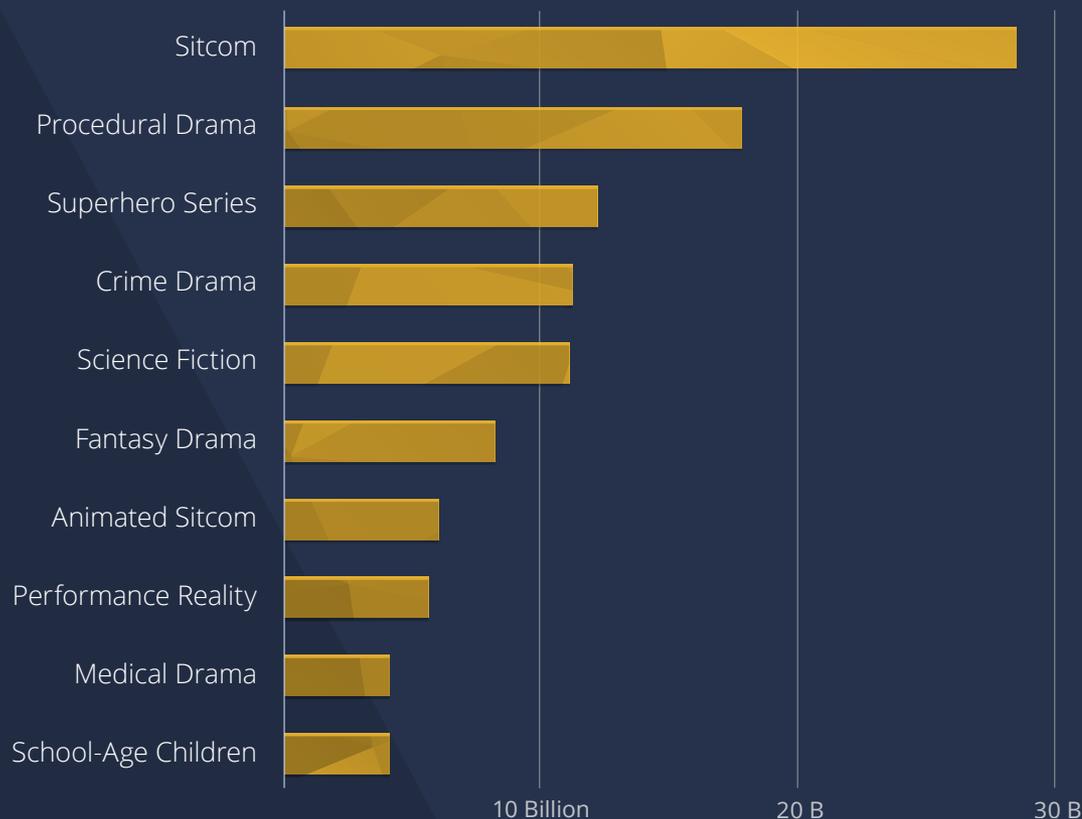
## Sitcoms and procedurals still popular overall

To find the most popular types of broadcast shows over the past six months in the US, the Demand Expressions™ for each sub-genre were summed. **Whereas superhero titles were the most common sub-genre among the top ten titles, the typical broadcast fare — sitcoms and procedural dramas — dominate by total demand.** Niche genres, such as science fiction and fantasy, do appear in the top sub-genres, but most have more mainstream appeal. Animated sitcoms, such as *The Simpsons* and *Family Guy*, and performance-based reality shows, such as *The Voice*, still account for a significant amount of broadcast demand.

The difference between the types of shows in the top ten and the most popular sub-genres reveals that while individual superhero shows may have high demand, overall there are still more titles (even if they have moderate demand) in common genres, such as sitcom. It remains to be seen whether the number of niche genre shows will grow, surpassing traditional genres, or whether titles in these genres will adapt features of the more popular shows, such as *The Big Bang Theory* has done.

US | Top 10 Sub-Genres

1<sup>st</sup> January – 30<sup>th</sup> June 2016 | Sum of Demand Expressions™





## **Cable Networks**

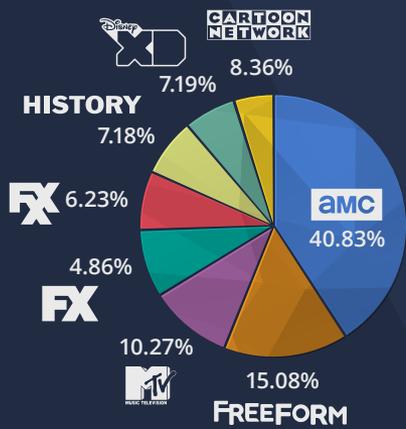
# Cable

## A range of genres at the top

The most in-demand show on cable is also the most popular show by linear ratings. *The Walking Dead* regularly gets over 10 million viewers while other cable shows struggle to reach 1 million, and it has over 27% more demand than the next-most popular cable show, *Pretty Little Liars*. In addition to *The Walking Dead*, AMC has two other titles in the top ten, the spinoffs *Fear the Walking Dead* and *Better Call Saul*, while all other channels only have one entry.

Compared to broadcast's top ten titles, the top ten cable titles represent a broad range of audiences. Two of the shows — *Star Wars Rebels* and *Adventure Time* — are animated titles primarily for children and two — *Pretty Little Liars* and *Teen Wolf* — are aimed at teenage audiences. Even the dramas vary significantly, from the historical *Vikings* to the horror *American Horror Story* to the slow-paced *Better Call Saul*. However, as with the broadcast series there is only one pure comedy series in the top ten: FXX's *It's Always Sunny in Philadelphia*.

US | Top 10 Titles | 1<sup>st</sup> January – 30<sup>th</sup> June 2016 | Median Demand Expressions™



| Title                             | Median Demand Expressions | Channel         | Also popular in |
|-----------------------------------|---------------------------|-----------------|-----------------|
| The Walking Dead                  | 27,035,264                | AMC             | Colombia        |
| Pretty Little Liars               | 21,187,818                | Freeform        | Iceland         |
| Teen Wolf                         | 13,722,989                | MTV             | Jamaica         |
| American Horror Story             | 11,662,519                | FX              | Switzerland     |
| It's Always Sunny In Philadelphia | 10,534,660                | FXX             | Ireland         |
| Better Call Saul                  | 10,019,272                | AMC             | Canada          |
| Vikings                           | 9,858,789                 | History         | Poland          |
| Star Wars Rebels                  | 9,797,412                 | Disney XD       | Hungary         |
| Fear The Walking Dead             | 9,333,801                 | AMC             | Spain           |
| Adventure Time                    | 6,970,657                 | Cartoon Network | South Korea     |

# Cable

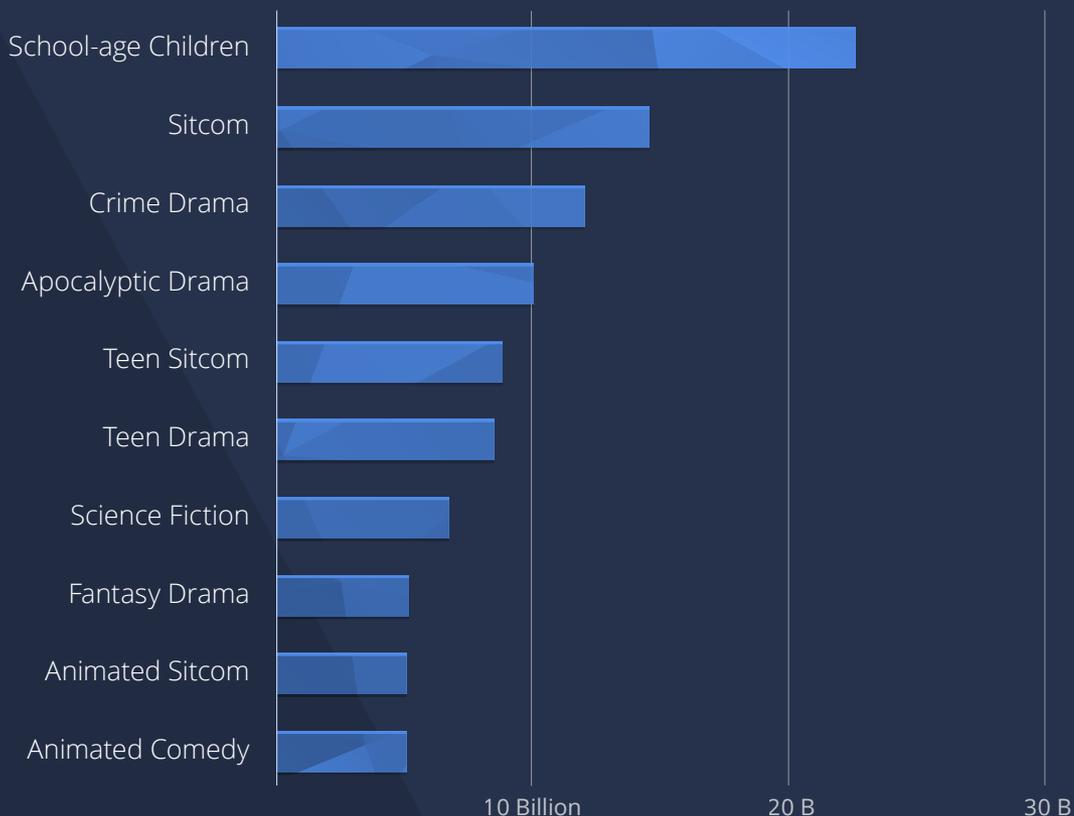
## Cable genres skew young

As opposed to the broadcast networks, the top cable shows and genres generally have the same distribution: there are a few drama sub-genres, a few children and teen genres, and sitcoms. **These top genres reveal that the most popular content on cable networks are aimed at younger demographics.** Titles for school-age children have 1.5 times more demand than the other genres and teen comedies and dramas have about the same amount of demand. In addition, animated shows, such as those on Adult Swim, are also popular and tend to skew towards a young adult audience. This emphasis on young demographics makes sense as most children/teen shows are found on specialty cable channels.

Of the more adult-focused genres, the usual sitcoms and crime dramas top the list. However, apocalyptic dramas, represented mainly by *the Walking Dead* shows, have nearly the same amount of demand though there are far fewer entries. Again, the most in-demand shows do not necessarily belong to the most popular genres.

US | Top 10 Sub-Genres

1<sup>st</sup> January – 30<sup>th</sup> June 2016 | Sum of Demand Expressions™





**Premium Cable  
Networks**

# Premium cable

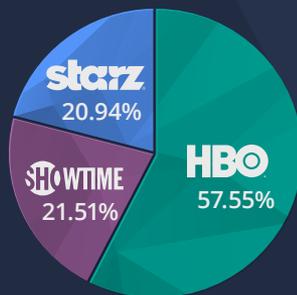
## A clear winner emerges

Out of the shows on premium cable channels, *Game of Thrones* is by far the most in-demand. This mega-hit has more than 140% more demand than the next-most popular title, *Shameless*, which is the largest difference between the top show and the others. However, the premium cable channels are most evenly represented in the top ten series by demand. The three major premium cable channels — HBO, Showtime, and Starz — all have over three of their titles in the top ten, indicating that they are fairly equal in terms of content popularity (with the major exception of *Game of Thrones*, of course).

Part of the reason for *Game of Thrones*' massive success is its fan engagement. Out of the top series on each platform, we found that *Game of Thrones* has, by far, the most activity surrounding it, as people discussing the story, the characters and actors, the cinematography, etc. This type of engagement matters in this new world of demand: social media can spread information (good or bad) about a show faster than simple word-of-mouth, which can lead to elements of the content going viral (such as the Red Wedding). Of course, not all content can inspire as much engagement as *Game of Thrones*, but **shows that give the fans something to discuss often have more demand than those that do not.**

### US | Top 10 Titles

1<sup>st</sup> January – 30<sup>th</sup> June 2016 | Median Demand Expressions™



| Title                              | Median Demand Expressions | Channel  | Also popular in |
|------------------------------------|---------------------------|----------|-----------------|
| Game Of Thrones                    | 24,029,131                | HBO      | Ukraine         |
| Shameless                          | 9,680,633                 | Showtime | Turkey          |
| Last Week Tonight With John Oliver | 6,919,726                 | HBO      | Bulgaria        |
| Outlander                          | 6,537,646                 | Starz    | New Zealand     |
| Ash Vs. Evil Dead                  | 6,398,190                 | Starz    | Russia          |
| Black Sails                        | 6,285,278                 | Starz    | Greece          |
| Silicon Valley                     | 6,197,665                 | HBO      | Hong Kong       |
| Billions                           | 6,035,285                 | Showtime | Kenya           |
| Penny Dreadful                     | 5,400,130                 | Showtime | Venezuela       |
| Vinyl                              | 5,078,875                 | HBO      | Italy           |

# Premium cable

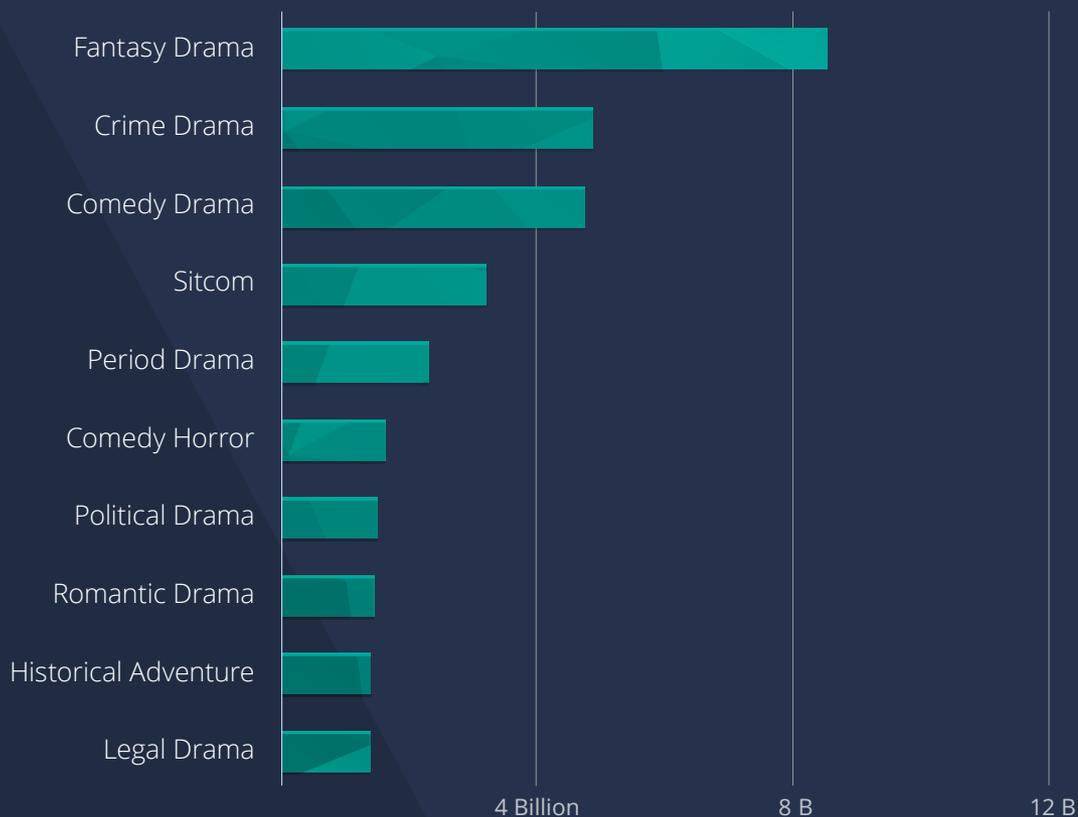
## Sex and violence lend themselves to dramatic genres

Because *Game of Thrones* is so much more in-demand than the other premium cable titles, it is not surprising that its sub-genre is the most popular type of show on these channels. Fantasy dramas have nearly twice as much demand as the other sub-genres, which are primarily other types of dramas. Premium cable channels can air more explicit content than other linear channels and so many of their shows have these elements. **Since shows with graphic violence and sex tend to be dramas, and consumers are drawn to this content because it is unavailable elsewhere, the most popular genres on premium channels are therefore types of dramas.**

Other linear channels may not be able to air explicit content, but the new OTT platforms can. It remains to be seen if the premium channels' loss of a monopoly on graphic shows will affect what type of shows they produce and how in-demand they will be.

US | Top 10 Sub-Genres

1<sup>st</sup> January – 30<sup>th</sup> June 2016 | Sum of Demand Expressions™





## **SVOD Platforms**

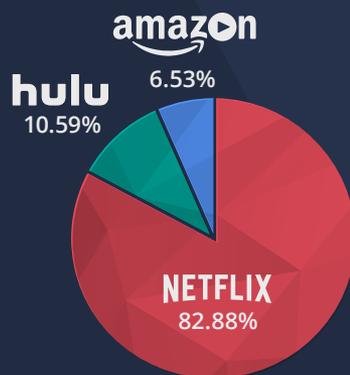
# SVOD

## Netflix rules, but demand is lower than linear

As Netflix is the most prolific producer of SVOD content, it is no surprise that the top ten SVOD titles is dominated by Netflix titles. Its flagship titles *Orange is the New Black* and *House of Cards* rank highly, but the most popular digital original series from the past six months is the sitcom *Fuller House*. Several other Netflix comedies rank within the top ten, and the popular *Making A Murderer* is the only documentary to appear among the top shows on any type of platform or channel. Hulu's *11.22.63*, which has more demand than *House of Cards*, and Amazon's *The Man in the High Castle* represent the other two major SVOD platforms.

Though SVOD originals seem to attract a lot of buzz, their Demand Expressions™ tell a slightly different story. **The median demand for the top SVOD titles are about on par with most of the premium cable shows and lower than the top broadcast and cable titles.** Much like premium cable channels, a relatively small percentage of households subscribe to an SVOD platform, whereas broadcast channels reach over 90% of the US population (and are free). Because of this difference in reach, demand for SVOD titles is naturally lower than demand for more available shows.

US | Top 10 Titles | 1<sup>st</sup> January – 30<sup>th</sup> June 2016 | Median Demand Expressions™



| Title                      | Demand    | Channel      | Also popular in   |
|----------------------------|-----------|--------------|-------------------|
| Fuller House               | 6,545,791 | Netflix      | Trinidad & Tobago |
| Orange Is The New Black    | 6,292,863 | Netflix      | Belgium           |
| 11.22.63                   | 5,564,009 | Hulu         | United Kingdom    |
| House Of Cards             | 5,109,069 | Netflix      | Pakistan          |
| Jessica Jones              | 5,015,148 | Netflix      | UAE               |
| Making A Murderer          | 4,527,675 | Netflix      | Sweden            |
| Daredevil                  | 4,288,749 | Netflix      | Jordan            |
| The Man In The High Castle | 3,493,504 | Amazon Video | Germany           |
| The Ranch                  | 2,831,087 | Netflix      | Australia         |
| Narcos                     | 2,604,191 | Netflix      | Netherlands       |

# SVOD

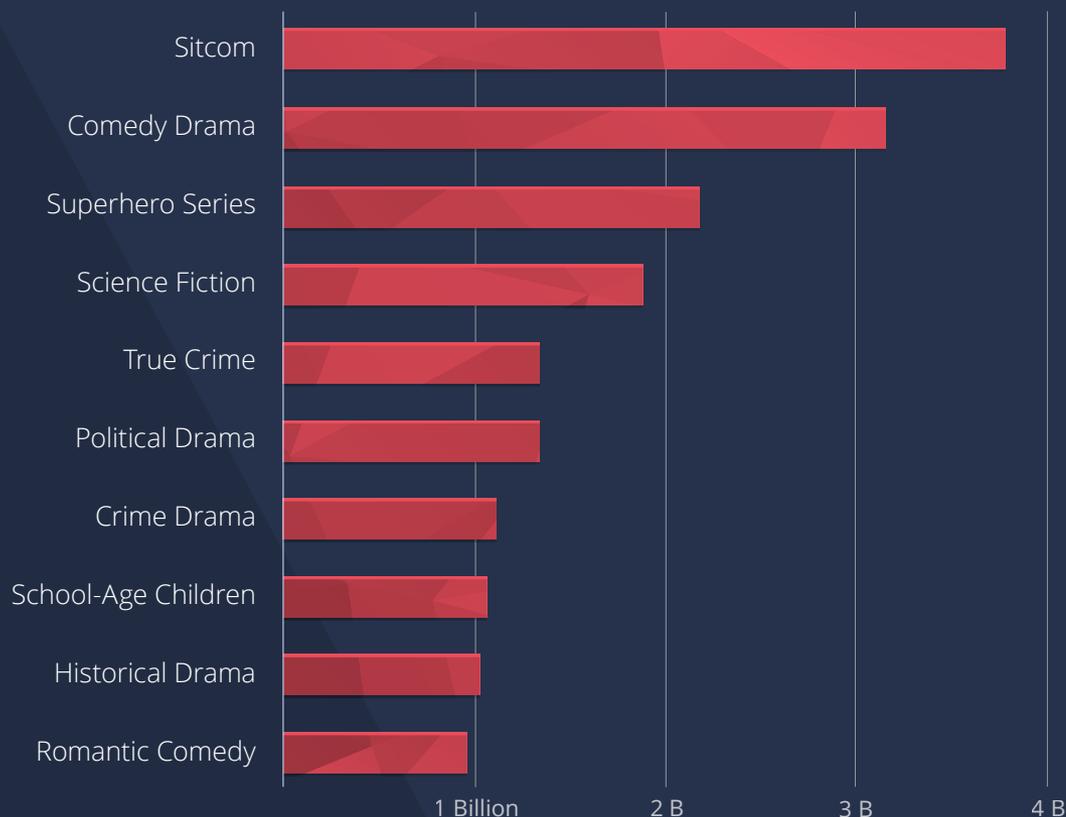
## Single hit shows drive genre demand on SVOD

The most popular genres on SVOD platforms are comedies: sitcoms top the list with comedy dramas close behind. **Since there are fewer shows on SVOD platforms than on linear channels, the popular OTT sub-genres are often driven by a single popular show.** For example, the true crime sub-genre contains only *Making a Murderer* and political drama is only *House of Cards*, both of which appear among the top ten SVOD titles. However, school-age children's shows are a fairly popular genre, with many titles on Netflix, even though no individual title is in the top ten.

Marvel's two titles, *Daredevil* and *Jessica Jones*, drive the demand for superhero shows to be the third-most popular, the same as on broadcast networks. Netflix is planning to release more titles in the Marvel universe, which will most likely increase the demand for this sub-genre even more.

US | Top 10 Sub-Genres

1<sup>st</sup> January – 30<sup>th</sup> June 2016 | Sum of Demand Expressions™





## **AVOD Platforms**

# AVOD

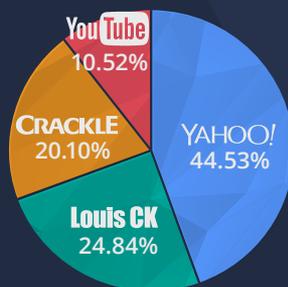
## Star power creates some hits

We have included both advertising and transaction video on-demand platforms in this section; while most of the titles are on AVOD platforms such as Crackle, Yahoo, and YouTube, the top show in this category is Louis C.K.'s self-hosted *Horace and Pete*. Yahoo's acquired series, *Community*, has nearly as much demand as the more recent *Horace and Pete* even though it has not aired new episodes for over a year. Demand for *Community* may be high because it formerly aired on a broadcast network and therefore reached a larger audience, and demand for *Horace and Pete* may be high because of the well-known actors appearing in the series.

These two titles have more than three times more demand than the rest of the top AVOD series; **overall, these shows have the lowest demand out of the five segments.** All AVOD titles, including *Horace and Pete*, have less demand than the top ten titles on the linear channels and less demand than the first eight top SVOD titles.

### US | Top 10 Titles

1<sup>st</sup> January – 30<sup>th</sup> June 2016 | Median Demand Expressions™



| Title                            | Demand    | Channel     | Also popular in |
|----------------------------------|-----------|-------------|-----------------|
| Horace And Pete                  | 3,024,368 | LouisCK.net | New Zealand     |
| Community                        | 2,547,865 | Yahoo!      | Canada          |
| Comedians In Cars Getting Coffee | 800,280   | Crackle     | China           |
| Video Game High School           | 360,163   | YouTube     | Switzerland     |
| Annoying Orange                  | 236,297   | YouTube     | Serbia          |
| Chosen                           | 181,922   | Crackle     | Hungary         |
| Other Space                      | 180,922   | Yahoo!      | South Korea     |
| Burning Love                     | 140,262   | Yahoo!      | Australia       |
| SuperMansion                     | 100,779   | Crackle     | South Africa    |
| Street Fighter: Assassin's Fist  | 97,565    | YouTube     | Jamaica         |

# AVOD

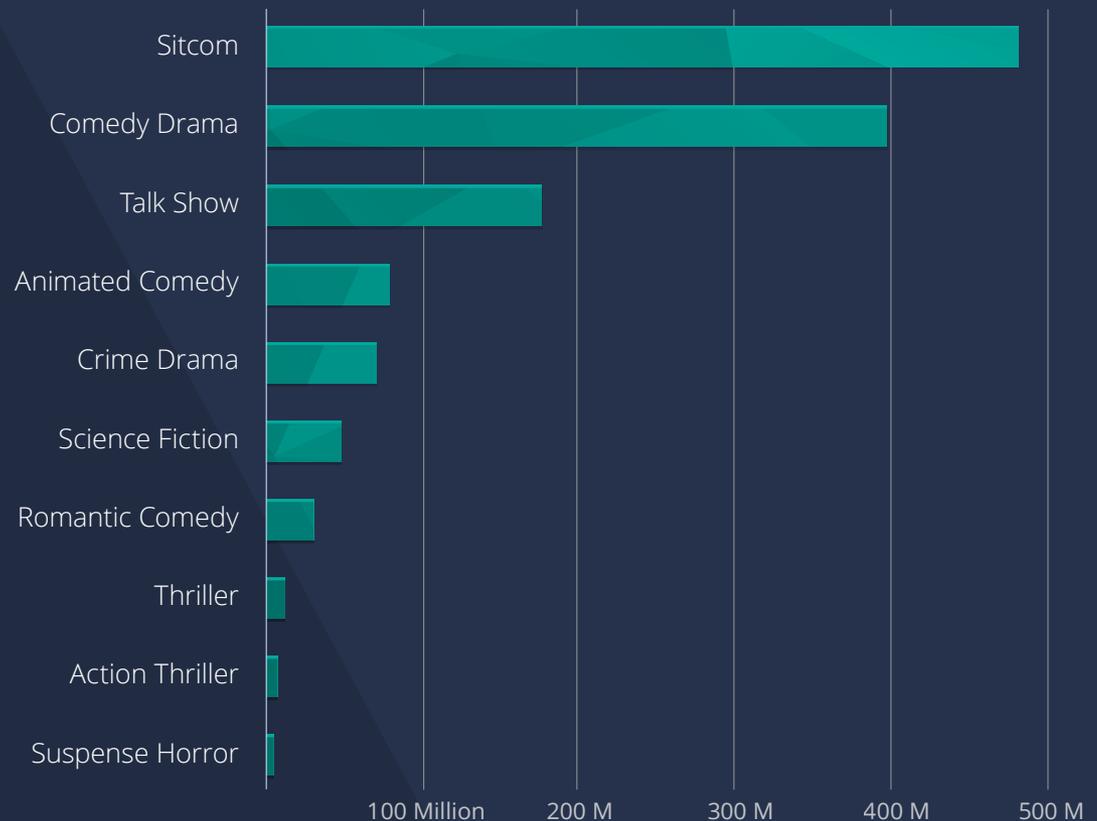
## Short-form content tends to have lighter genres

As with the SVOD platforms, sitcoms and comedy dramas are the most popular genres on AVOD platforms by quite a large margin. The comedies have more than twice the demand of the next-most in-demand genre, talk shows (represented by *Comedians in Cars Getting Coffee*), which in turn has more than twice the demand of all the other genres. Some of the remaining genres have appeared on other platforms, but some, such as the thrillers, are uniquely popular on AVOD. **Because AVOD shows tend to be shorter, these genres that are less plot-heavy, such as comedies and thrillers, are more popular in this medium.**

As the production of content for AVOD continues to expand, we expect to see more genre variation arise as creators experiment with new formats and ways of storytelling.

US | Top 10 Sub-Genres

1<sup>st</sup> January – 30<sup>th</sup> June 2016 | Sum of Demand Expressions™



# About the Author

## Parrot Analytics

Parrot Analytics is a data science company that empowers media companies, brands and agencies to understand global audience demand for television content. Wielding the world's largest audience behavior data sets, the company has developed the world's only global cross-platform, country-specific audience demand measurement system.

Parrot Analytics captures an unprecedented spectrum of actual audience behavior including video streaming consumption, social media, blogging platforms, file-sharing and peer-to-peer consumption spanning 249 countries. This enables media companies, for the very first time, to understand audience demand for content across all content distribution platforms in all markets around the world.

For more information visit [www.parrotanalytics.com](http://www.parrotanalytics.com)

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