

Exhibiting Global Television: On the Business and Cultural Functions of Global Television Fairs

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Global television programming fairs (MIP-TV, MIPCOM, NATPE) have received little attention from media scholars. Nevertheless, as this article demonstrates, these fairs serve a variety of crucial business and cultural functions in international television trade. Although they have come under fire recently from executives and industry observers alike, this article argues that such fairs are semi-permanent features of the international syndication industry. As such, they warrant more serious consideration by media scholars from numerous disciplinary backgrounds who hope to understand both the economic and cultural operations of television globalization.

Global television programming fairs, officially known as “sales markets” in the business, lie at the heart of international syndication. Such programming trade shows as MIP-TV (Marché International des Programmes de Télévision, or International Television Program Market), NATPE (National Association of Television Programming Executives), and MIPCOM (Marché International des Films et des Programmes pour la Télévision, la Vidéo, le Câble et le Satellite, or International Film and Programme Market for Television, Video, Cable and Satellite) occur throughout the year in locations around the globe, drawing tens of thousands of programming executives from every facet of the syndication business and every corner of the globe. These programming fairs are similar to international film festivals, except that they have few pretensions to art. No awards for best series are handed out: The programming fairs are about business.

And yet rational business concerns often take a backseat to showmanship at television programming trade shows. When entering the sales floor, one gets the overriding impression of sheer extravagance. Mammoth billboards advertising new series loom over the entryway. Everywhere, lavish sales “stands” reach toward the ceiling. Universal built a twenty-foot tall replica of Mount Crumpit from *How the Grinch Stole Christmas* (2000) to house its sales staff at NATPE 2001. Warner Bros. International plastered a whole wing of the Palais de Festival in Cannes with Looney

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Tunes characters at MIP-TV 1999. MGM had lion cubs on display in a glass cage at NATPE 2001. Commenting on the complexity of preparing the sales floor, one trade show organizer explained, "It's like building a city" (P. Smithard, Managing Director of Europe for NATPE, personal communication, July 29, 2002). Venturing further onto the sales floor, one begins to glimpse a vast array of perquisites, or "perks." Several stands feature free, non-stop food or drink. Celebrity photo sessions and giveaways also lure participants to vendors' stands. At NATPE 2001, executives lined up at the Paramount stand to have their pictures taken with cheerleaders from the now-defunct XFL and played catch in the long hallway with palm-sized promotional footballs. When a particularly attractive giveaway or photo opportunity begins, word spreads across the sales floor like wildfire. Some enterprising companies even provide large bags emblazoned with their logos that participants use to carry the armfuls of promotional giveaways. In addition to the extravagance on the sales floor, several companies sponsor exclusive soirees after the floor closes. When King World International launched its remake of *Hollywood Squares* at NATPE 1998, for example, it hosted a private Elton John concert at the New Orleans Superdome, where it introduced the secret celebrity "center square," Whoopi Goldberg (D. Lawrence, Managing Director, Lippin Group London, personal communication, June 7, 2002).

Such tales of extravagance, and the price tags that accompany them, have led many in the business to question the significance of programming fairs, especially considering that large American distributors who shell out millions of dollars attending them claim to make few important sales there (Brennan, 1999b). Industry executives and trade show organizers have clashed publicly on several occasions over these issues. In 1999, Buena Vista Television International skipped MIP-TV, leading to speculation that other Hollywood distributors might follow suit; at NATPE 2002, the domestic wings of every major studio forwent sales stands for more subdued business meetings at a nearby Las Vegas hotel. While most executives agree that trade shows provide an important time and place to network with current and potential clients, they cast a wary eye on the extravagances of the programming fairs. Commentators have generally treated the extravagances as unnecessary indulgences, similar to corporate jets or bottomless expense accounts that need to be eliminated in the current era of global economic uncertainty.

Drawing on the insights of organization/institutional analysis, business management and marketing, and cultural studies, I argue here that global television programming fairs and their attendant excesses serve numerous business and cultural functions. These functions include facilitating efficient networking, concretizing power relations among participants, differentiating otherwise similar products, and providing the terrain on which distributors construct their corporate brand identities. The research for this article comes from my observations of two global programming fairs, MIP-TV 1999 and NATPE 2001. I also thoroughly reviewed trade journal articles about programming fairs and interviewed several international television professionals.¹

In spite of gloomy forecasts to the contrary, prevailing industry conditions and practices suggest that television programming fairs will continue as an integral component of international syndication for years to come. Consequently, media scholars from all disciplinary perspectives would do well to examine how such trade shows are related to media globalization.

Literature Review

Although television programming fairs serve a pivotal role in international syndication, they have rarely captured the interest of media researchers, who have traditionally focused on transborder television flows and the economics of trade. Research on program flows has documented that television from the U.S. dominates screens around the world, though many studies also emphasize the importance of regional television producers and a decreasing reliance on U.S. imports over time (DeBens & de Smaele, 2001; Nordenstreng & Varis, 1974; Patterson, 1982; Sepstrup, 1990; Silj, 1988; Tracey & Redal, 1995; Varis, 1984; Waterman & Rogers, 1994). While these studies document the overall characteristics of international trade, they are not designed to address the business practices of international television, which shape transborder flows in the first place.

Meanwhile, economists working from both mainstream and Marxist positions have specified many of the features, logics, and policy issues associated with international television trade. We know, for instance, that the size and wealth of the American market, the volume of programming produced, and the relative cheapness of importing compared with local production help American distributors dominate international trade. In spite of U.S. dominance, however, many analysts agree that television markets around the world are becoming increasingly interdependent (Alleyne, 1995; Dupagne, 1992; Dupagne & Waterman, 1998; Herman & McChesney, 1997; Hoskins, McFadyen, & Finn, 1997; Mattelart, Delcourt, & Mattelart, 1984; Wildman & Siwek, 1988). In spite of these insights, economists have not examined television programming fairs. Except for brief mention in a couple of articles and books that address other aspects of international television (Dupagne, 1992; Sinclair, Jacka, & Cunningham, 1996), to date only a single dissertation addresses such trade shows (Mahamdi, 1992). Due to this oversight, we have little understanding of the ways in which business practices concretize the general economic realities of international television trade. A handful of media scholars have examined the business practices of international television. Olson (1999) combines cultural studies and management theory to describe how the diversity of the U.S. market, coupled with the competitiveness and geographic concentration of the domestic industry, results in American programming and films that are culturally "transparent." This transparency, he argues, facilitates international distribution. Olson's main interest lies in specifying the semiotics of transparency, and therefore industry and business considerations do not figure prominently in his analysis.

Mahamdi (1992) has delved more deeply than others into the business practices of international television trade, examining the variety of international television flows, the types of business deals that underwrite those flows, and the options and preferences of buyers. Relying on surveys and interviews with television professionals conducted at MIP-TV, his work gives us the most complete picture to date of how the business of international television trade is conducted. Because he mainly focuses on how the international television business replicates prevalent economic inequalities, however, Mahamdi treats MIP-TV as a way to gain access to executives, rather than examining the trade show itself in any detail.

Management and marketing researchers have addressed the general phenomenon of industry trade shows and how they factor into corporate objectives. It is interesting to note that debates surrounding the utility of trade shows are common in the business community (Gopalakrishna, Lilien, Williams, & Sequeira, 1995; Herbig, Palumbo, & O'Hara, 1996; O'Hara, 1993). Most researchers conclude that trade shows are effective sales tools, although their impact cannot easily be quantified due to the complexity of purchasing decisions and the variety of other sales efforts that buyers encounter (Gopalakrishna, et al., 1995). Instead, trade shows offer a variety of "pre-sale" or "non-selling" opportunities that are crucial to future sales, especially with regard to products that entail complex purchasing decisions (O'Hara, 1993). Television program sales typically involve such decisions. Researchers agree on the presence of four main kinds of non-selling activities at trade shows that will interest us here: establishing and renewing relationships with buyers, gathering information about the industry and competitors, creating awareness of new products, and generating or maintaining corporate images (Gopalakrishna, et al., 1995; Herbig, et al., 1996; O'Hara, 1993; Rice, 1992; Roslow, Nicholls, & Laskey, 1992). In addition, Penalozza (2001) suggests that trade shows serve important cultural functions such as establishing the identities of participants, instructing them in the business culture, and fostering common-sense assumptions about how the industry functions. In what follows, I explore each of these functions in global television fairs.

The Institutional Structure of International Television Syndication

Before addressing global television programming fairs in depth, I want to examine the structure of the international syndication industry whose representatives meet there to trade programming. Using the insights of organizational sociology, we begin to see why international syndication is "probably the most socially intimate of all commodity trades" (Mahamdi, 1992, p. 237), a fact that explains many of the main features of global television fairs, from the layout of the sales floor and control of foot traffic to security measures and extravagant private parties.

Hirsch (1972) examined in detail the organizational structure of the book pub-

lishing, record, and film industries, concluding that these industries exhibit a proliferation of contact personnel on the "input" (product selection) and "output" (promotion and marketing) sectors of the individual organization. While his analysis does not address the television industry, it can productively be adapted to our present purposes to demonstrate the organization of international television trade (see also Turow, 1997). Hirsch argues that uncertainty is the dominant feature of the culture industries. Cultural commodities such as television require substantial capital investment, but their popularity and subsequent revenues are unpredictable. Therefore, numerous sales and marketing executives are necessary actors at the organization's output boundary to ensure that the products receive favorable critical evaluations and that they are sufficiently differentiated from and promoted against competitors' products. In addition, the industries require a steady stream of new products at the input sector, which in turn leads to a large number of industry representatives who seek out new material.

The global television fairs form at the intersection of domestic distribution sectors (outputs) and international acquisitions sectors (input). At the output boundary, distribution executives market their programming to international buyers through advertisements placed in the trade press, promotions at trade shows, direct-mailing of videotapes, and in-person sales calls. At the input boundary, international acquisitions executives sift through stacks of advertisements, trade press reviews, and pilot videotapes; attend numerous regional and global sales events; and receive sales representatives, international co-producers, and independent distribution agents in their offices. Every major American and European distributor assigns executives to international markets, while large buyers employ executives who specialize in specific program genres and regions.

According to Hirsch (1972), contact people at the output boundary of the culture industries engage in a variety of efforts to ensure commercial success, including "linking the organization to (1) retail outlets and (2) surrogate consumers in mass-media organizations" (p. 651). In the book industry, for instance, retail outlets include bookstores, while surrogate consumers are book reviewers whose opinions can make or break a new release. Because of the importance of surrogate consumers, promotional representatives expend a great deal of time and effort trying to sway their opinions. Global television fairs collapse Hirsch's two linking strategies because they operate as the retail outlet where the organization's contact people and the surrogate consumers meet. Buyers are the primary consumer in international television sales, but they ultimately serve a surrogate function because the success of an internationally syndicated program lies with viewers. Though independent, buyers' choices are never wholly their own. Instead, they receive their authority because they lay claim to being privileged interpreters of viewers' tastes, much like book reviewers. Consequently, distribution executives work hard to court acquisition executives, and programming trade shows provide a vital setting for these efforts.

Overview of the Major Global Programming Fairs: MIP-TV, NATPE and MIPCOM

Television programming fairs can be divided into three types: global fairs dedicated to programming trade of all genres from all nations; regional fairs, where distributors from the region exhibit their wares for international buyers; and genre-specific fairs that focus on particularly popular international genres such as reality programming or documentaries. In addition, television rights for films are sold at international film festivals. Here, I concentrate on global television fairs, which afford the greatest diversity of participants and the greatest levels of extravagance.

MIP-TV, held every spring, is the premier global market for television programming. Begun in 1963 as a place for European buyers and American distributors to trade programming, MIP-TV has grown into a truly international event. As Table 1 shows, companies representing more than 100 nations generally attend MIP-TV. This number has remained quite constant over the past decade, attesting to the fairs' international flavor. In addition, the number of companies has increased by approximately 20% over the past 10 years, reflecting both the growth in international television trade and the importance of MIP-TV in con-

Table 1
Attendance at MIP-TV, MIPCOM, and NATPE, 1992-2002

| Year | MIP-TV | | MIPCOM | | Total | NATPE Int'l Attendance |
|------|---------------------|-----------|--------------|-----------|---------------------|---------------------------|
| | Participants | Countries | Participants | Countries | | |
| 1992 | 9008 | 101 | 7803 | 76 | 8674 | 1185 |
| 1993 | 9164 | 103 | 8242 | 84 | 11,277 | — |
| 1994 | 9565 | 99 | 8499 | 85 | 11,652 | — |
| 1995 | 10,225 | 107 | 9240 | 91 | 15,750 | — |
| 1996 | 10,578 | 104 | 9776 | 92 | 17,694 | 2975 |
| 1997 | 10,901 | 103 | 10,145 | 96 | 16,751 | — |
| 1998 | 10,518 | 102 | 10,428 | 90 | 17,250 | — |
| 1999 | 10,791 | 101 | 10,571 | 88 | 17,440 | — |
| 2000 | 10,300 ^a | — | 11,786 | 89 | 17,520 | 4380 |
| 2001 | 11,049 | 90 | 9943 | 85 | 20,348 ^b | 4585 |
| 2002 | 10,217 | 92 | 10,209 | 90 | 10,125 ^c | — |

Courtesy of NATPE and Reed-Midem.

^aAttendance estimated from trade journals.

^bThe attendance figure for NATPE 2001 in part reflects the conference's relocation from New Orleans to Las Vegas, which is more readily accessible to Hollywood-based executives.

^cAccording to NATPE officials, this number reflects a significant drop for 2002 due to the economic downturn in general and the uncertainty following September 11.

ducting trade. For many distributors and buyers, MIP-TV is the only international trade show that their organizations can afford to attend (Khalid Abdilaziz al-Mugaiseeb, CEO of Kuwait TV 2, personal communication, October 13, 1999; Mahamdi, 1992). In the late 1990s, Hollywood producers began to scale back their presence at MIP-TV, but increases in mid-season replacements, which take the place of cancelled series on the American broadcast networks beginning in January, have rejuvenated Hollywood's interest because it gives them a venue for selling such series internationally (Brennan, 2000). The participation fees of the Americans are vital to the survival of MIP-TV, and the fair's sponsor, Reed-Midem, has worked hard to keep them on board. While Xavier Roy, the CEO of Reed-Midem, insisted in 1999, "Even without the U.S. major studios, MIP will thrive" (Brennan, 1999b, p. 64), he elsewhere admitted that "their needs are changing because the market is changing and we have to adapt our shows to these changes" (Brennan, 1999c, p. 48).

NATPE was founded in 1963 as a national programming trade show. However, the international contingent has grown significantly in recent years (see Table 1), leading some domestic distributors to complain that the fair is now too crowded to be effective for them. The non-attendance of many domestic distributors at NATPE 2002 is the latest installment in a debate about the relevance of television fairs fueled by consolidation in both syndication and station ownership. While representatives from hundreds of stations around the country used to buy programming from dozens of syndication companies, since the relaxation of ownership regulations in the Telecommunications Act of 1996, group owners have devoured local stations and centralized program buying in a single corporate office. At the same time, a handful of companies have come to dominate domestic syndication. However, while domestic syndication "implodes," international sales are a booming business: at NATPE 2002, for example, the international wings of the large domestic distributors were out in full force (B. Johansen, President & CEO, NATPE, personal communication, October 24, 2001). The developments at NATPE 2002 demonstrate that international trade is an increasingly independent and lucrative sector of the syndication industry that responds to quite different economic realities than domestic sales.

Finally, MIPCOM, founded in 1985 and sometimes referred to as MIP-TV's younger brother, takes place in Cannes every fall, and draws participants similar to those at MIP-TV. MIPCOM attendance grew more than 50% between 1992 and 2000, before falling significantly in October 2001 in the wake of the September 11 terrorist attacks (Table 1). The remarkable growth of MIPCOM has paralleled the growth in international television trade over the past 10 years, suggesting a connection between programming fairs and the smooth operation of international sales. MIPCOM is geared more toward American and European programming than MIP-TV because the large studios have fall ratings data with which to demonstrate the popularity of new programming. Again, the creation of MIPCOM demonstrates the degree to which Western programming and companies dominate international television trade. While the Hollywood majors make most of their deals with larger

buyers at the regional Los Angeles screenings in May, MIPCOM offers a venue for programming that was not sold at Los Angeles and for buyers who did not attend the screenings (Mahamdi, 1992; Roxborough & Masters, 2001). For this reason, the Hollywood majors have not barraged MIPCOM with the kinds of complaints and threats that MIP-TV and NATPE have received.

Networking, Differential Access, and Business Culture

The importance of surrogate consumers and the personalized nature of selling in international television require that distributors and buyers have frequent contact. Global programming fairs offer efficient settings for this task because they bring everyone together at a common place and time. Fred Cohen, former President of King World International, explains that his company attends MIP-TV because "all my buyers are here, all my customers" (Brennan, 1999a, p. 6). Kevin Sullivan, President of Canadian Sullivan Entertainment, sounds a similar note about NATPE: "It's an important place to meet European buyers" (Kelly, 1995, p. 50). In fact, networking among executives is perhaps the most commonly accepted business function of global trade shows.

Effective networking at global fairs is complicated by the volume and diversity of attendees, who have varying degrees of financial and business influence. From the distributor's perspective, price differentials among the world's buyers are extreme, ranging in 1997 from more than \$150,000 per hour of programming in Canada to less than \$70 in Bermuda (TV World Prices Guide, 1997). As far as buyers are concerned, programming of certain genres and national origins "travels" better across cultural boundaries. Michael Puopolo, Manager of International Research for Warner Bros. International Television, expresses a common refrain when he says that "better than any other culture, American culture transfers well to the rest of the world" (personal communication, May 11, 1999). Several mechanisms help classify buyers and sellers and manage the various networks efficiently, including the arrangement of the sales floor, the layout of sales stands, and security arrangements at certain stands and the fair as a whole. These mechanisms simultaneously construct and express power relations among participants.

MIP-TV 1999 housed exhibitors in three separate halls: the main Palais de Festival with several hundred stands; the Riviera Village, with approximately 100 stands, some with large exhibition areas overlooking the Mediterranean; and Palm Village, a much smaller, temporary structure with about 50 stands. Within each venue, a variety of exhibition spaces was available at various prices. The African Barter Company's space near the center of Palm Village, for instance, was three times larger than most other stands, and sported stereo televisions playing African music videos and documentaries. In the main Palais, the majority of stands was located on the first level, which was bisected by a wide hallway. On either side of the hall stretched 13 rows of stands. The prime sales location in this hall seemed to be the spaces closest

to the hallway. Here, exhibitors like Carsey-Warner International, Worldvision, and Hearst International rented stands several times larger than the standard size. Meanwhile, Romanian Television rented a stand well off the beaten path that was little more than a table and some chairs. Other companies, listed as "participating without stand," forwent the sales stand all together, relying on mobile phones and notes in mailboxes to communicate with buyers. The variety of ways to participate in MIP-TV demonstrates that the fair caters to distributors and buyers of many sizes. In addition, the grouping together of small, medium, and large distributors through differential pricing of stand sizes and locations helps buyers navigate the vast number of distributors to find those who match their needs. Private parties and VIP tents operate in similar ways to screen out participants who lack the proper clout or connections.

The layout of individual sales stands also facilitates efficient networking while affirming a distributor's power in international syndication. Small distributors eager to meet with all kinds of buyers typically set up stands with tables and chairs near the entrance, and staff them with sales agents who greet visitors. Wealthier distributors almost uniformly employ receptionists, who act as a first point of contact and triage visitors for the sales agents, thus ensuring the networking process runs smoothly. Many such stands also include private meeting rooms in the back where agents and visitors can escape the din of the fair and discuss business. Distributors as small as Polish Television and as large as CBS International employed similar layout schemes at MIP-TV 1999, although the latter included a patio on the shores of the Mediterranean. Finally, many Hollywood distributors employ both receptionists and security personnel to help manage the flow of visitors. Warner Bros. International's sales area at MIP-TV 1999 covered an entire hall on the second floor of the Palais. A large, circular front desk staffed with several receptionists greeted visitors, and those who got passed the front desk crossed over one of two gangplanks guarded by velvet ropes and security guards to enter the sales hall.

The various gatekeeping efforts help participants sort through the thousands of attendees at the fairs, providing efficient means for distributors and buyers of similar caliber to find one another in the crowd. Furthermore, such efforts serve important cultural functions by articulating power relations among participants, and adding allure to a distributor's products. Differential access creates numerous in- and out-groups that articulate the status of participants. An invitation to one of the exclusive parties illustrates that one has "arrived" in international syndication (D. Lawrence, Managing Director, Lippin Group London, personal communication, June 7, 2002), and attendance at the global programming fairs is crucial for gaining access to the more select in-groups. Girts Licis, Head of Acquisitions and Sales for Latvian Television, reported difficulty meeting with sales agents from large distributors at MIP-TV 1999 because he had only recently begun acquiring programming independently (personal communication, April 15, 1999). Meanwhile, Andreea Raianu, Head of Selection and Programming Development for Romanian Television, which paid license fees equivalent to the Latvians, claimed to have a good relationship with

the majors because she had been acquiring programming from them for more than 10 years (personal communication, April 14, 1999; TV World Prices Guide, 1997). As a group, buyers enjoy the greatest access to sales floors and special events. Table 2 shows how, at NATPE 2001, color coded badges signaled who could and could not enter each venue, distinguishing between buyers and representatives from various television channels, who made up the highest class of participants; exhibitors and celebrities, who made up a second tier; and representatives of various support businesses, who comprised a third.

Table 2
Badge Colors, from National Association of Television Programming Executives 2001 Conference and Exhibition Directory (abbreviated list)

| Blue | Red | Green |
|---------------------|-----------------|------------------------|
| Broadcast Network | Exhibitor | Advertising |
| Buyer | Exhibitor/Buyer | Distributor/Syndicator |
| Cable Network | Celebrity | Marketing |
| DBS | | Public Relations |
| Station Group Owner | | Research & Ratings |
| TV Station | | |

Differential access also adds allure to distributors' products, which is critical in an industry where purchasing decisions rest largely on hunches. The challenges of national, regional, racial, ethnic, and historical differences associated with international trade make it tough for buyers to figure out which imported series will work in their markets. For one thing, the success of a series in one market by no means guarantees success in other markets. In addition, methodologically consistent ratings data from around the world have only recently started to become available (Mahoney, 1991), but even ratings data cannot explain the reasons behind a series' performance, and therefore cannot effectively guide future buying decisions. While some buyers screen imports for focus groups, the relative cheapness of imported programming discourages the practice in all but the largest markets. Furthermore, networks do not conduct follow-up research to discover whether viewers responded to the same elements in imports as focus group participants did, so again buyers have few objective criteria on which to base their decisions (I. Duran, Vice President of International Affairs, TV Azteca [Mexico], personal communication, April 15, 1999; F. Mulder, Director of Program Acquisitions and Sales, NOS [Netherlands], personal communication, April 16, 1999). Instead, a distributor's track record in international sales often stands in for such criteria, creating expectations that new series may perform similarly well. Restricting access to sales stands and agents gives visible evidence to the claim that one's programming is widely sought-after. One commentator writes of the allure of programming from the majors in domestic syndication

that “part of what a station is buying is the promise and grandeur and power of a major syndicator or studio” (Bednarski, 2001, p. 21). The point is equally relevant to international sales.²

Generating “Buzz”

Beyond limiting access to sales staff, distributors engage in a range of efforts designed to build interest and excitement around their programming. These efforts, known informally as “buzz,” range from free giveaways at sales stands to expensive soirees with exclusive guest lists at remote chateaux in the French Riviera. Positive buzz distinguishes a series or producer from other competitors, and helps distributors differentially promote new series.

Quite simply, buzz refers to business-related word-of-mouth that circulates year-round, but becomes more intense and concentrated in the “incestuous environment” of global television fairs (P. Smithard, Managing Director of Europe for NATPE, personal communication, June 12, 2002). Industry trade journals help create and circulate buzz at the fairs, providing much of the grist for sales-floor discussions. Fair organizers publish their own daily recap of news, and dozens of trade journals run special daily issues available only on the sales floor, including *Variety*, *Hollywood Reporter*, and *Television Business International*. Participants tear through stacks of these free journals for the latest information about the fairs. In fact, the trade journal stand was one of the liveliest areas at the fairs I attended. Debbie Lawrence, Managing Director of Lippin Group’s London Office, which handles public relations at the television fairs for several large American and European distributors, explains the importance of trade journal coverage at the fairs plainly: “To be one of the main distributors of drama and not to be in the daily drama feature [of the organizer’s publication] is seen as a disaster” (personal communication, June 7, 2002). Like networking, then, buzz consists of multiple levels that must be properly managed for successful sales.

Buzz surrounds celebrity appearances and giveaways on the sales floor, large release parties at the sales stand, and star-studded, invitation-only galas. All of these promotional efforts share a similar goal of generating excitement and interest around new series, a goal perhaps best served by global television trade shows. Again, Lippin London’s Lawrence explains, “Television markets are certainly a time to be focused on new shows and therefore [to] create buzz for all new programming” (personal communication, June 7, 2002). Similarly, Bruce Johansen, President & CEO of NATPE says, “Obviously, I am biased, but I think it would be very difficult to orchestrate buzz without the focus of a trade meeting . . . Trade shows themselves create buzz that radiates onto the product” (personal communication, June 6, 2002). Promotional efforts at the sales fairs also reflect Hirsch’s (1972) insight that the culture industries must differentially promote new product, lavishing some with extensive attention while letting others flounder. Because of their unpredictable

performance, organizations over-produce new products in the hopes that a small percentage will catch on, and they heavily promote only those that they consider most likely to succeed.

The role that buzz plays in creating favorable impressions of programming and distributors, and the presumed influence that such impressions have on eventual buying decisions, goes a long way toward explaining the trademark extravagances of the global programming fairs. Because buyers function as surrogate consumers in international television, distributors can focus their promotional efforts on courting their favor, rather than trying to create programming that appeals to viewers around the world with far-flung tastes. This practice rationalizes the process of international television trade and makes manageable the otherwise insurmountable task of trying to understand the cultural affinities and dislocations between specific national and sub-national groups and specific television series or films.

Creating Corporate Identity in International Television

Promotional efforts at the global television programming fairs do more than assist effective networking, express power relations among participants, and generate buzz. They also serve as the chief vehicles through which distributors articulate their corporate brands in international television. In this final section, I want to look at how the sales stands themselves help construct a recognizable corporate identity, and how such identities preserve particular expressions of cultural difference in international television. I focus on sales stands because they are the most visible expression of corporate identity at the fairs, although the promotional activities already discussed reinforce the associations that the stands express.

Branding is an essential tool in distributors' efforts to differentiate themselves from the competition. Branding adds value, or brand equity, to a distributor's products by imbuing them with desirable qualities (Keller, 2000). In crowded markets where it is difficult to distinguish between competing products, such as international television sales, "corporate identity carries a bigger share of the responsibility for sustaining [profit] margins" (Hatch & Schultz, 2000, p. 13). The two main strategies for constructing brand identities in international television are through product line, or programming genre, and national identity.

Genre as Brand

Product brands, based on actual or perceived attributes of products, are the most common type of brand (Olins, 2000). Programming genres and subgenres form the primary product market in international television, around which many distributors build their corporate identities. Gardening for Real People, Inc. and The Sportsman's Showcase with Ken Tucker, for example, use the subgenres of how-to gardening and outdoor programming, respectively, to distinguish themselves on the sales floor. As

increased channel capacity worldwide has fragmented television audiences into smaller and smaller niches, served by increasingly focused specialty channels, such niche-distributors have flourished. However, some of the largest corporations in international television also build their brands around programming genre. Carsey-Werner International, King World International, and Playboy TV International all have established themselves as global experts in ensemble situation comedies, game-show formats, and erotic programming, respectively.

What we see reflected in the various brands built around programming genres and subgenres is the relative worth of different kinds of programming. While channel growth has increased the diversity of programming sold at the fairs, the most profitable genres are still those that reach the widest and most lucrative audiences. Large corporations concentrate on programming designed for such audiences, and their efforts to attract buyers from channels that target broad audiences create holes for niche-providers. International television trade, then, does not homogenize cultural differences: instead, it searches out differences and structures them into a coherent hierarchy based upon perceived economic value. These hierarchies are never inflexible, however, because industry changes can alter the popularity of certain programming genres. Carsey-Warner International capitalized on revised attitudes about the international marketability of comedies in the early 1990s (Dupagne, 1992; Tobin, 1990), while Playboy TV International has benefited from worldwide growth in pay-per-view channels, which are often willing to carry adult programming (Davies, 1998).

National identity as Brand

Perhaps the most effective brand identities in international television come from a combination of proven ability in a programming genre and a clear national image. Spectacular Hollywood blockbusters, German crime series, Latin American *telenovelas*, Australian documentaries, Canadian co-productions, and Japanese animation all offer good examples of this strategy. In the minds of many buyers, these nations are synonymous with these genres, and distributors who feature such genres enjoy increased brand equity. However, given the small number of programming genres seen as capable of international export and the vague images that some nations conjure up in buyers' minds, this form of branding is unavailable to many distributors.

Although the business management literature has long recognized that nation of origin can positively influence sales of certain products, O'Shaughnessy & O'Shaughnessy (2000) argue that national identities are generally too multifaceted to provide the clarity that successful brands require. Instead, "the reputational capital of the nation in respect of . . . product category is far more likely to play a role in buying" (O'Shaughnessy & O'Shaughnessy, 2000, p. 58). That is, in particular product categories, such as Swiss watches, a nation can enjoy a favorable international reputation that bestows prestige on producers based in that nation. While the

distinction between reputation and national image is important, we also need to recognize that national reputation in specific products must be built and maintained. In international television, part of the strategy that distributors employ to build a reputation involves exhibiting a recognizable national image at market, which draws on associations with the nation that buyers presumably already carry.

Under certain buying conditions, nation of origin becomes more salient. Studies of purchasing behavior have identified several ways that people make buying decisions, including impulse-buying, habit-buying, and deliberate buying. Deliberate buying occurs "when no single option is superior to others" (O'Shaughnessy & O'Shaughnessy, 2000, p. 62), and is often accompanied by risk. In such instances, nation of origin has the greatest influence on purchasing decisions because it can help identify one option as superior, such as when someone pays more for a Japanese camera than a Chinese one. As we have seen, because of the high risk of failure of imported programming, program buyers are quite deliberate in making buying decisions. Thus, nation of origin is likely to be an important consideration in international television syndication.

Many exhibitors try to leverage national identity to increase brand equity. NATPE 2001 featured sales pavilions dedicated to programming from Belgium, the UK, Canada, Germany, the Netherlands, Quebec, Ireland, Korea, the Nordic countries, Spain, Italy, France, and Switzerland. The French pavilion, for example, drew on two recognizable French images: a French-style café, large enough to give it the ambience of an open-air café in the otherwise cramped exhibition hall, surrounded by brightly colored facades of quaint, seventeenth century French buildings, which housed the sales rooms of the pavilion's 42 corporate sponsors.

If properly managed, a strong national image acts as a family brand for a variety of genres and distributors, increasing the levels of the brand hierarchy and creating flexibility. Recognizable family brands "allow access to global associations that consumers may have toward the company [or nation]," while sub-brands associated with particular genres "can help customers better understand how products vary" (Keller, 2000, pp. 126-7). Hence, the French pavilion draws on the image of France as a cultured nation at the level of the family brand, while French animation companies distinguish themselves from Japanese companies by selling slower-paced series that highlight historical, educational, and fantastic themes. Just as a national brand cannot succeed without a distinct product category, individual genres receive added differentiation and desirability through the creation of a strong national brand.

The attempt to create a slice of France in the Las Vegas convention center runs counter to the conventional wisdom that the international markets encourage producers to create programming that is "substitutable" for Hollywood's programming (see, for example, Sinclair, et al., 1996, p. 20). If these French distributors hoped to emphasize the similarity between their programming and American-style programming, they would have made quite different exhibition decisions. Instead, they are trying to build brand equity through the distinctiveness of French culture. Of course, the degree to which a few tables and some cardboard cut-outs express the

full complexity of French culture is debatable. Still, as McCrone, Morris, and Kiely (1995) argue, regarding efforts to construct a brand identity for the Scottish heritage industry, the commodification of national culture may be limiting and distorting, but it is never politically vacant or univocal. Commodified cultural expressions can serve radical as well as conservative political ends.

Producers from nations that have been trading programming internationally for a long time and those from nations that developed strong international images as the result of imperialism are well-positioned to use branding in this manner. Nations and regions without readily identifiable images or those that do not have expertise in a particular programming genre find branding more difficult. South Korea's MBC Productions, for example, brought 96 programs to NATPE 2001, but little in the programming, promotional materials, or exhibition design identified the series or the producer with Korea. In short, it had a weak brand identity, in part because MBC did not create a clear Korean image. Because nations with long histories in television production have cornered the market on the most lucrative programming genres, it is difficult for new entrants to discover a profitable niche. But the doors are not shut. Recently, for example, we witnessed the remarkable success of reality formats like *Survivor* and *Big Brother* from the Nordic region, which has now become synonymous with the genre. As distributors become more and more successful, many of them chafe against the confines of their national identities and seek independent corporate identities. In spite of the usefulness of national identity for branding, most of the buyers I spoke with felt that cultural differences between their audiences and imported programs cause difficulty (e.g., Hoskins & Muris, 1988). While national identity may help a distributor build a brand presence, those who can avoid nationalist associations may benefit from appearing more universal. Warner Bros. International, for instance, crafted its presence at MIP 1999 self-referentially around its well-known Sylvester the Cat and Tweety Bird characters, hoping that their popularity would spread to the distributor's new series.

Conclusion

This article has explored the business and cultural importance of global television programming fairs. Like most industry trade shows, these fairs help executives establish and renew business relationships by creating a space for networking and a variety of mechanisms for managing networks, which also articulate participants' roles and the power relations among attendees. The programming fairs provide a venue for introducing new products, as well as the means for generating excitement about releases through trade journals, giveaways, and special events. And they aid in corporate branding, as distributors design sales stands and other material to create an identity with such tools as recognizable national imagery. Thus, programming fairs and their attendant excesses are much more than unnecessary expenses in danger of disappearing.

Nevertheless, a number of developments in international syndication threaten to

reshape specific global fairs and increase competition among the fairs. The growing division between international and domestic syndication will likely sever NATPE into two or more conferences, each emphasizing a different sector of the programming industry. NATPE's international component serves two unique functions that distinguish it from MIP-TV and MIPCOM, and make it relevant to the largest distributors in the world: it allows non-American distributors to sell programming to U.S. cable channels that increasingly rely on international programming; and it lets distributors from across North America meet with wealthy buyers because the costs of traveling to the U.S. make NATPE a self-selecting fair.

MIP-TV, meanwhile, will maintain its identity as the most international fair for buyers and sellers from around the world. The fair's importance for the generation of buzz and the display of corporate power guarantee that large distributors will continue to pay for prime locations in the Palais. However, the Hollywood majors may one day scale back their presence. As I discussed above, the majors have found renewed relevance for MIP-TV because they have more replacement series on the American broadcast networks each January, which gives those series a boost in international sales. This trend will continue as long as the broadcast networks maintain their high level of midseason replacements, but if network practices change, the relevance of MIP-TV is questionable. Because the majors introduce their new fall series at the L.A. Screenings, merely two months after MIP-TV, it seems unlikely that they would have sufficient new programming at MIP-TV to warrant the extravagant promotional expenses without replacement series to sell.

Finally, MIPCOM will probably remain much the same for the foreseeable future because its October date offers a venue for new American and European network series. Of course, the continuing importance of the fair rests on the assumption that the fall television season will continue to dictate production schedules. Many cable channels in the U.S. and emerging networks like UPN and the WB have adopted staggered schedules as a way to lure viewers, and even the traditional networks seek new series earlier and earlier each year. A switch to more of a year-round production schedule would also require year-round sales, which might wreak havoc with global fairs as fewer distributors would have new programming to sell at market. The impact of such a production schedule on the fairs is unpredictable, but every fair has responded to the scheduling changes by introducing on-line components to aid in year-long dialogue and promotional activities for buyers and sellers.

The continuing relevance of global sales fairs gives good reason why media scholars from all backgrounds need to pay more attention to the phenomenon. Mainstream media economists might analyze the costs and benefits of attending global programming fairs, as their counterparts in business have begun to do with trade shows. Management scholars might develop case studies that address successful brand-building strategies at the fairs or explore the role of networking at fairs for career advancement. Lastly, critical media scholars might use the insights of anthropology that have been applied to television reception to analyze the business culture of international television. In particular, explorations of how executives understand

and try to overcome the global cultural differences that frustrate successful programming trade seem fruitful. Studying television fairs could add much needed insight into the "black box" of the international television industry and enhance our understanding of the cultural significance of global television.

Notes

¹ The interviews I draw on for this article are part of a series of 49 interviews that focused on several aspects of international television trade. When discussed, sales fairs were only one of the topics covered in these interviews. In total, interviews with 10 executives, including several interviews with two NATPE executives, are used in the present analysis.

² Although popularity in the U.S. market bodes well for a series' international success, it is by no means a guarantee. *Seinfeld*, for instance, was the most popular U.S. program in a decade, but it preformed miserably overseas (M. Puopolo, Manager of International Research for Warner Bros. International Television, personal communication, May 11, 1999).

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