

PlumResearch

MipRoundup

Key Trends and Developments

March 2024

About PlumResearch

We're an independent company dedicated to providing the most reliable insights to the global entertainment industry.

Since 2015, we've been partnering with the world's largest media companies, talent agencies, and brands who rely on our unbiased insights to make their business decisions.

Our flagship product, Showlabs, was built to provide you with data from hundreds of thousands of consumers in over seventy-five markets around the world, including the United States, Mexico, France, Germany, Brazil, Japan and more.



7+

years of experience
in big data

60

team members in the
United States, Poland,
France and Chile

75+

markets with robust,
representative panels



KEY “TRENDINGS”
AND GOSSIP



THE BIG SHIFT



FAST



UNSCRIPTED



SCRIPTED

A red heart is centered in the image. Overlaid on the heart is the text "Thank You MipTV" in a white, sans-serif font. The background is a dark grey-blue color with numerous out-of-focus, colorful circular lights in shades of blue, green, purple, yellow, and white, creating a bokeh effect.

Thank You MipTV

MipTrends

Thoughts, Buzz and Gossip

Thoughts from the leaders:

FAST & AVOD

Alan Wolk, TVREV "I am most excited to see the industry come to grasps with the power of the digital nature of streaming, all of the many things you can do both from a storytelling POV and from an advertising POV. Generative AI will play a big role in this too, and I see a very bright future for the industry as a result."

Jennifer Batty, Samsung TV Plus "excited about the time when during these industry events we're not talking about FAST anymore but about television".

David Salmon, TUBI "BVODs and SVODs tend to superserve the median viewer,"

Tony Marlow, CMO, Lg Ads Solutions "The Behavior is there".



Thoughts from the leaders:



Brand

“The format that works best is what the brand needs in that moment...there’s not a set rule, brands are all different, they all have different goals. We have to be the ones to understand that, interpret that and turn it into content...we’re going to use our creativity and great producers to deliver that.” - [Carlotta Rossi Spencer](#), **Banjay Branded Entertainment.**

Timo Agillander, Managing Director at IPR.VC “Strongly believe in strong quality IP (IP-based model)

Gerrit Kemming, MD, Founder, Quintus Studios “digital and linear will grow further together. + brands' money will go directly into content”

Thoughts from the leaders:



Collaboration

Kelly Wrights, MD of Distribution, Keshet International “Collaboration is Key”.

MIP SDG AWARDS with United Nations Open Planet, Emily Renshaw-Smith (winner of sdg innovation award): “There is hope and huge innovation happening - quest of imagination if we get to net zero - the tv industry has to tackle that now giving hope and imagination for a better future”.

Bo Stehmeier. “We need to restructure the business and be more collaborative,” said

Thoughts from the leaders:

Unscripted

Maciej Gozdowski “The 2024 Olympics are going to be something completely different from what we’ve ever seen,” he said. “There will be several channels to choose from, push information coming in every time something happens, etc.”

Michael O’Connor “We’re definitely in the midst of winter right now, but these things are cyclical, so it will bounce back at some point,” said.

Jack Oliver, Sky, “What we look for are really premium documentaries, because we want to make sure we give our viewers content worth paying for.”



Thoughts from the leaders:



Streamers

Mark Endemaño, S.R.L. The expansion of SVOD is slowing and that major streaming markets are approaching maturity

Frederik Vaulpré. “Today, the motto is ‘everyone is a streamer’.

Thoughts from the leaders:

AI

Guy Bisson AI will develop to the extent that it will be possible to develop entire show, from film to distribution, using a suite of AI tools from the bedroom.

Mark Endemaño, S.R.L. From pre-production to scriptwriting, animation, editing and dubbing, the use cases of AI are endless

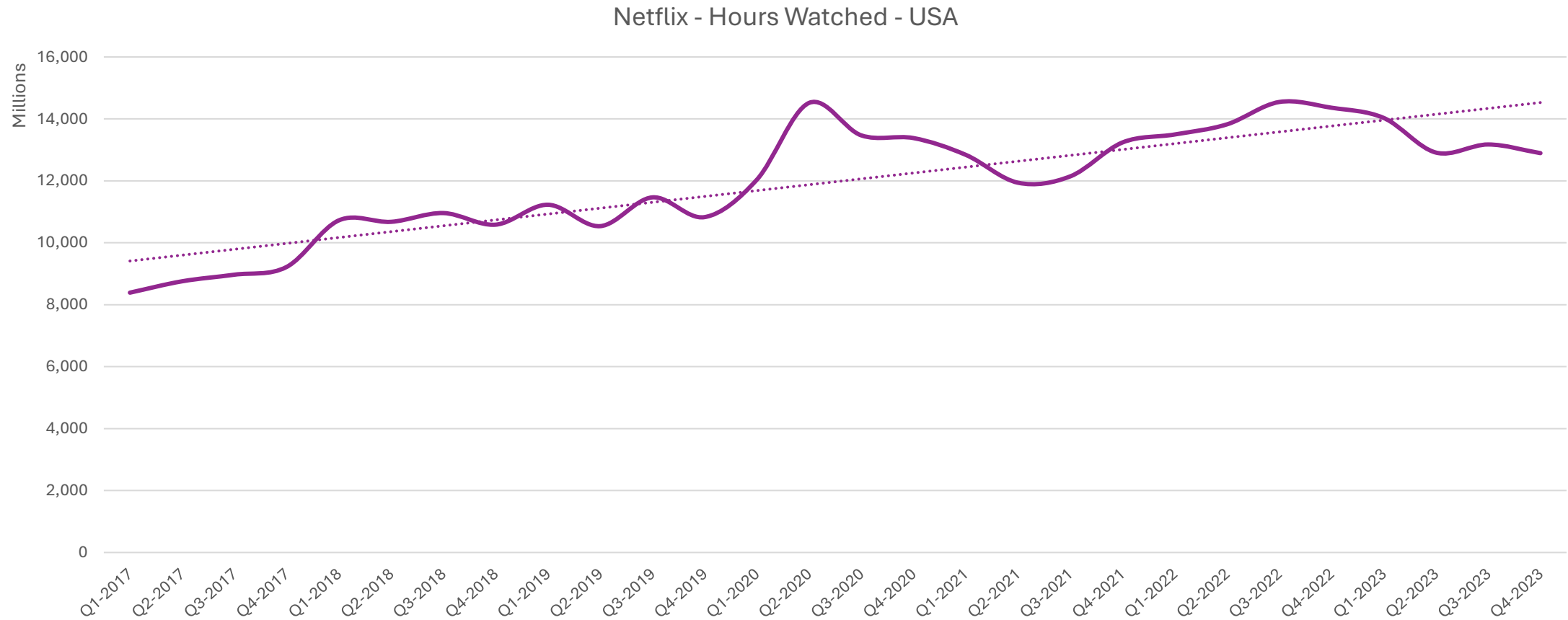
Tom Bowers Lean into it as content makers, its our job, not someone else's



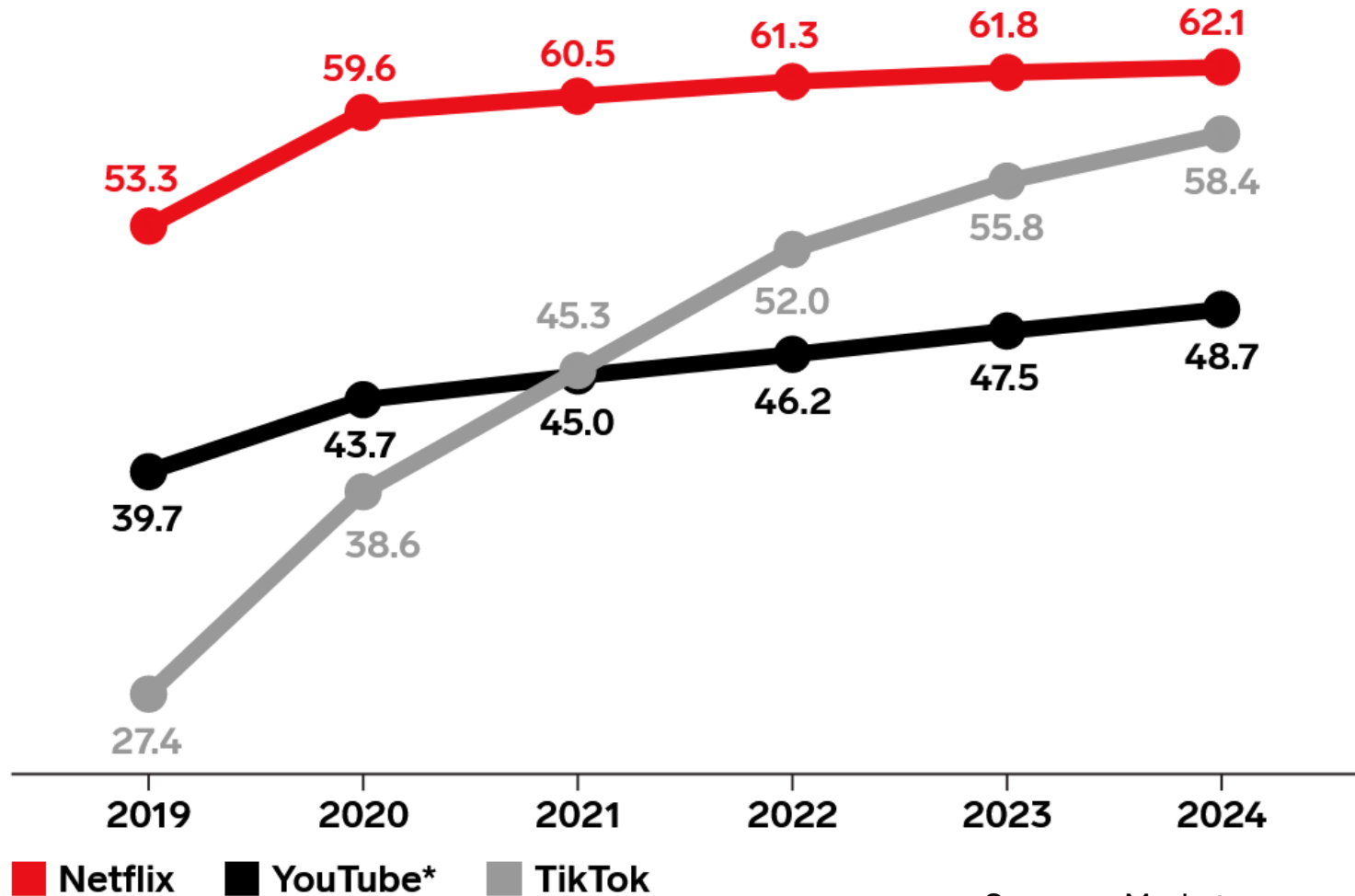
MipTrends

The Big Shift

The big shift – growth continues on Netflix



But is dwarfed by growth in TikTok



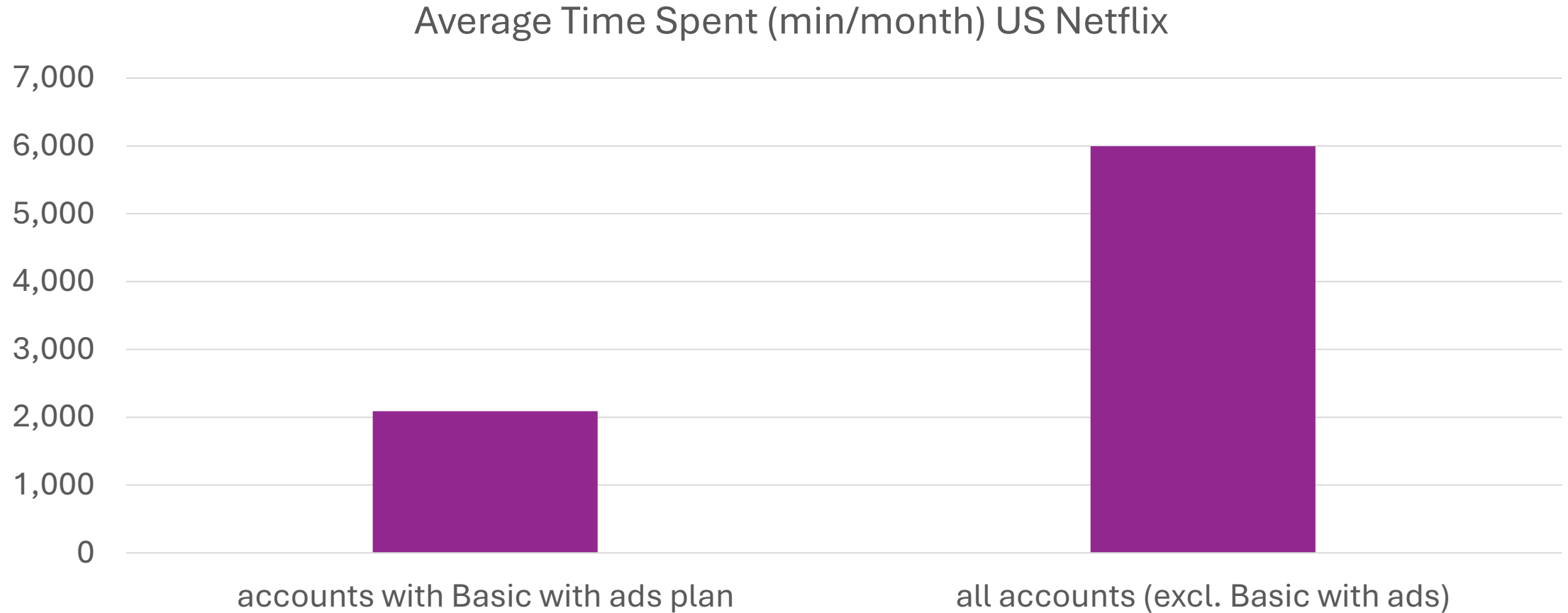
Modest growth in Netflix

Massive Growth in TikTok

Strong Growth in YouTube

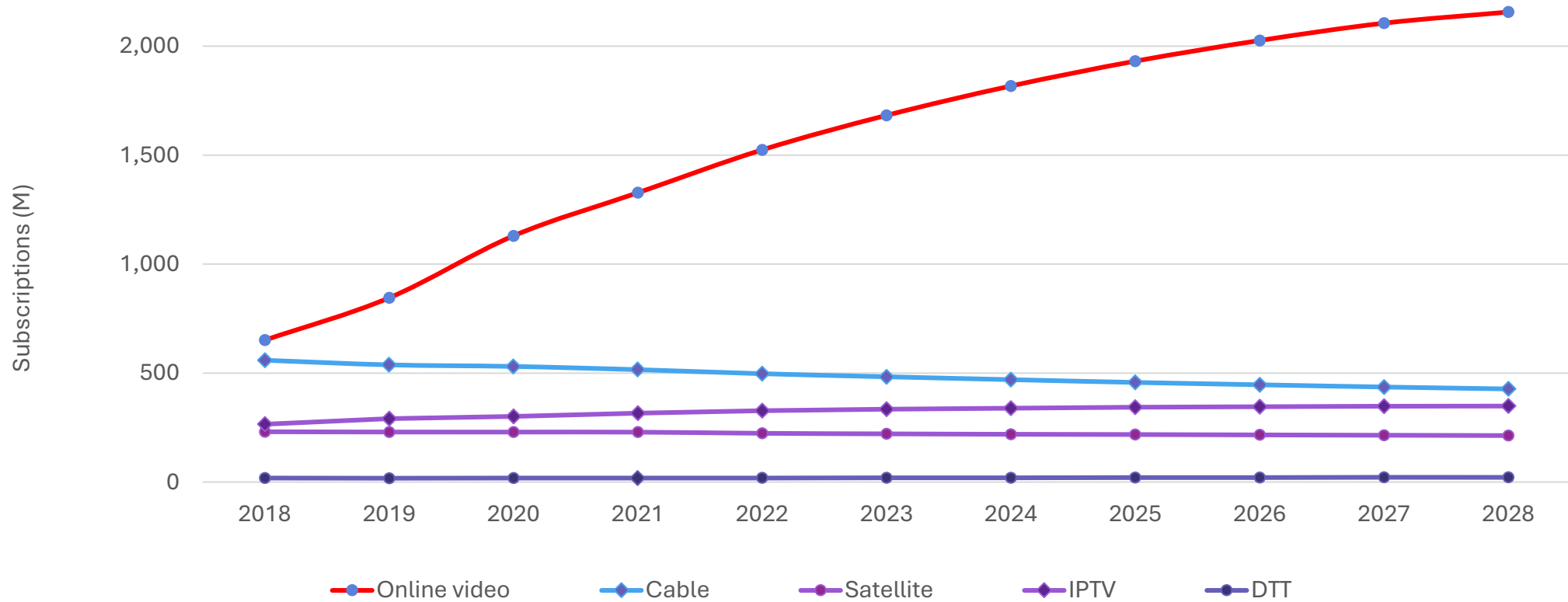
Source: eMarketer

But does not necessarily translate



And...

Global: pay-TV and online video subscriptions by platform, 2018 – 2028
(millions)



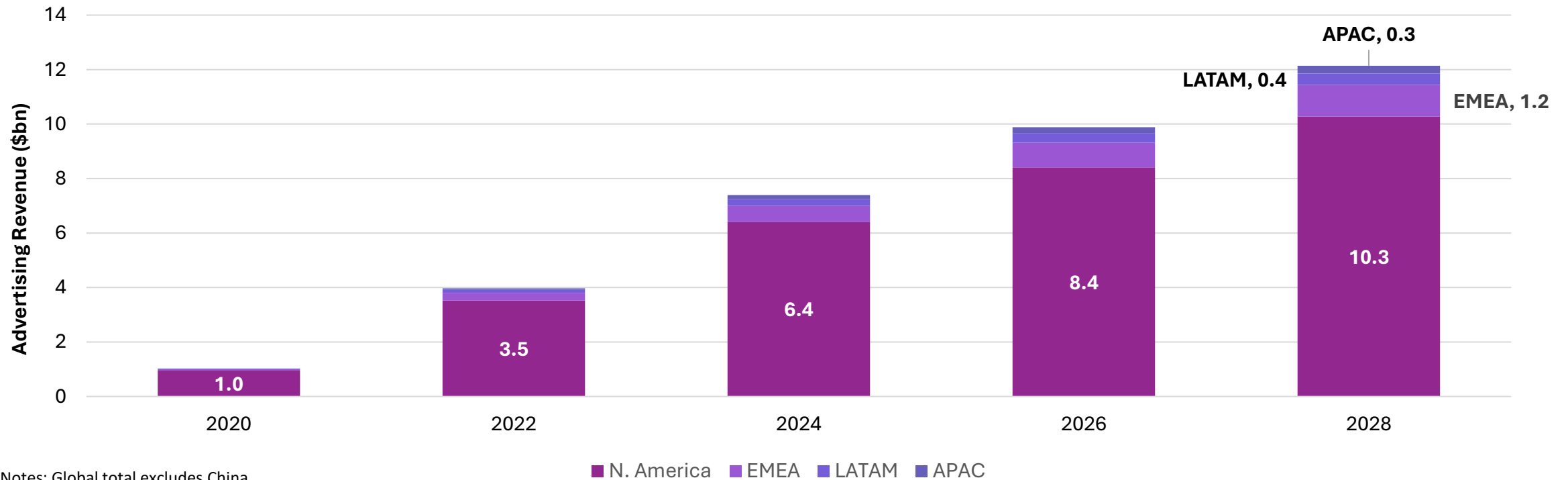
Source: Omdia

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FAST

FAST mainly a US trick...

Global: FAST channel revenue, 2019-28



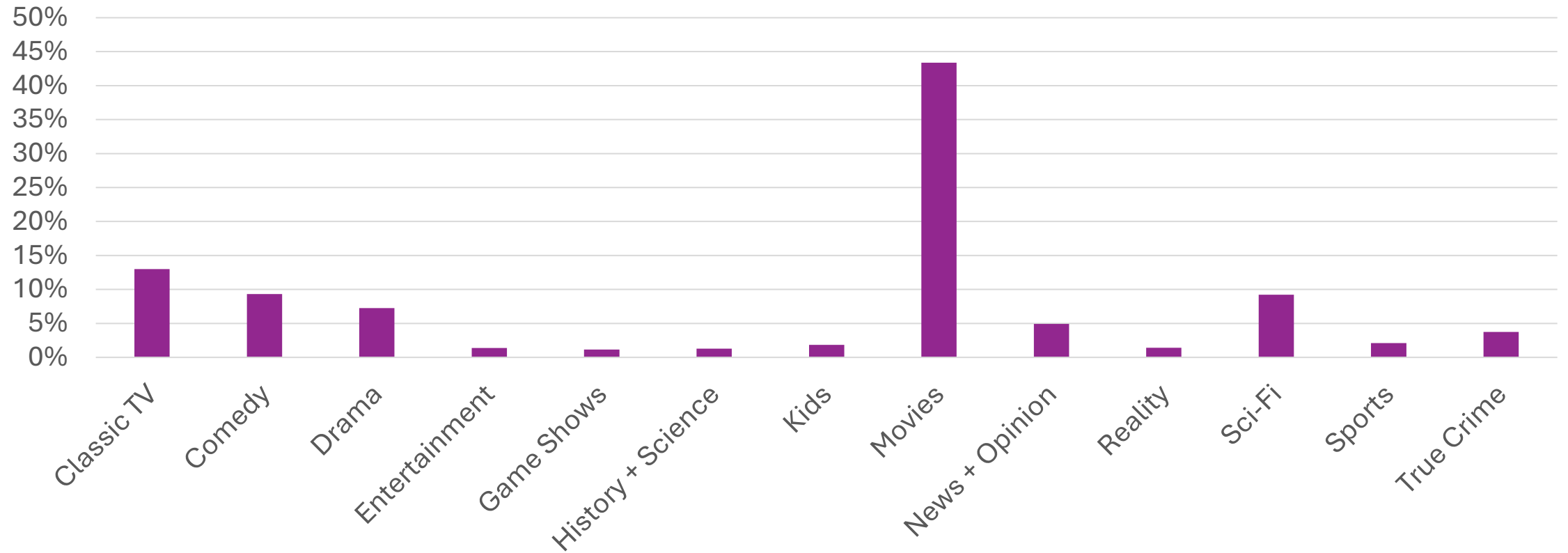
Notes: Global total excludes China

Source: Omdia Advertising Intelligence Service

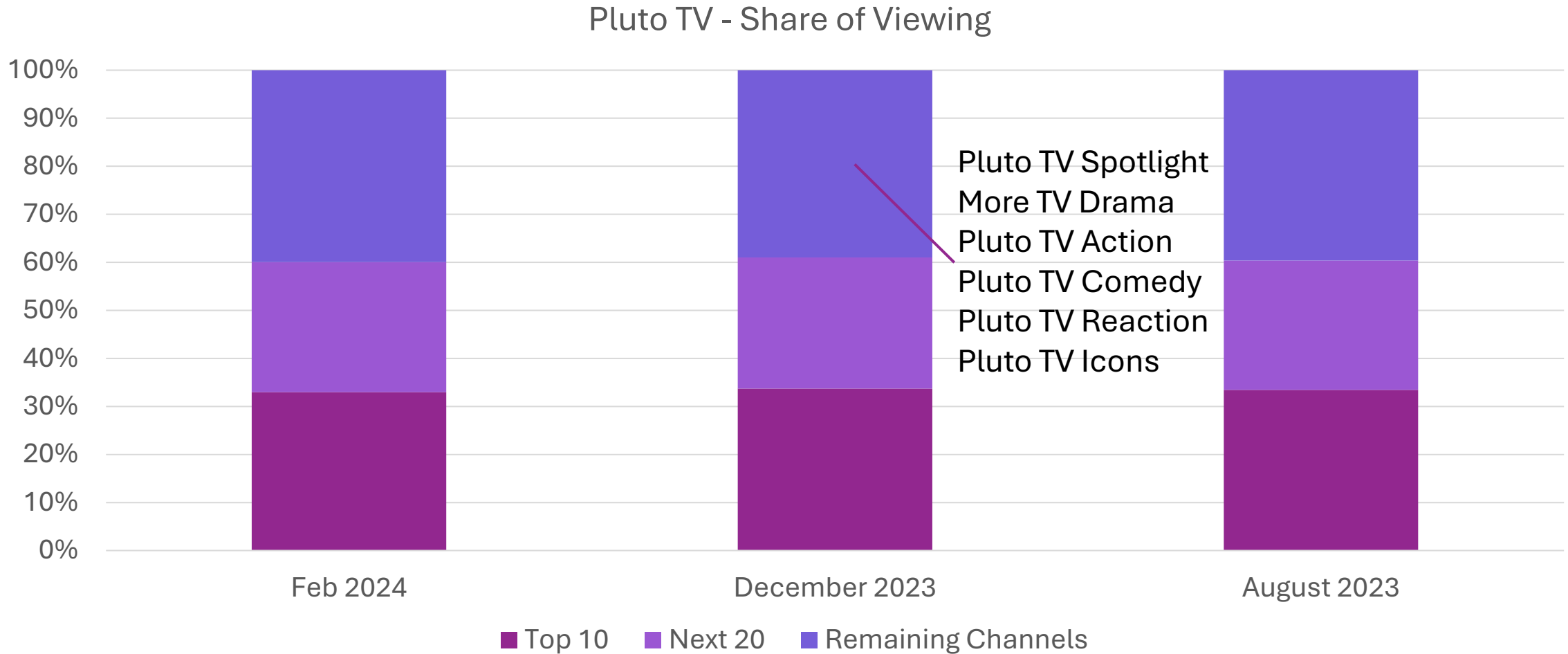
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And while a home for library, does have its own niches...

Share of Viewing - FAST

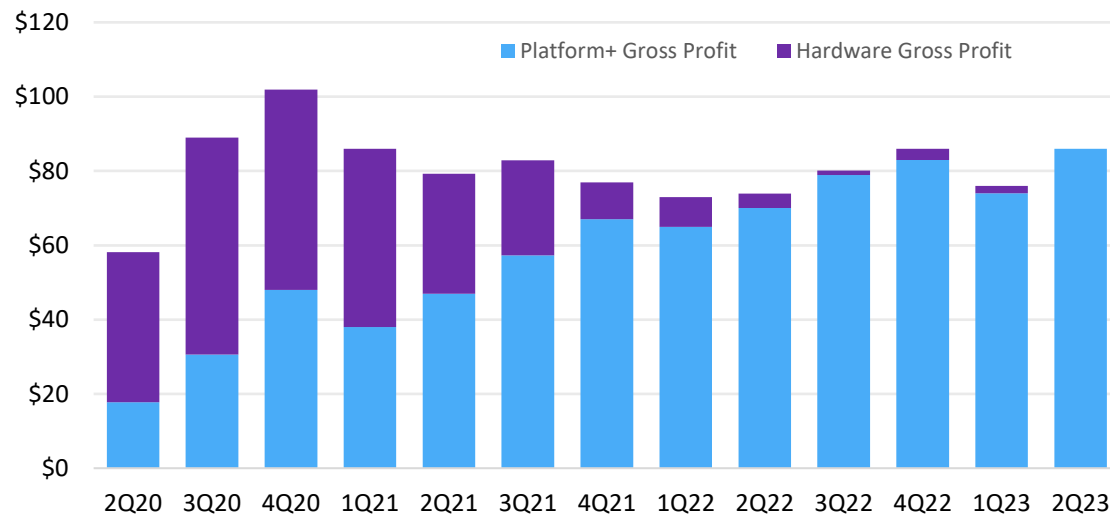


FAST promises to iterate linear to tv 2.0... but...



Despite this, a continued CTV FAST play is guaranteed

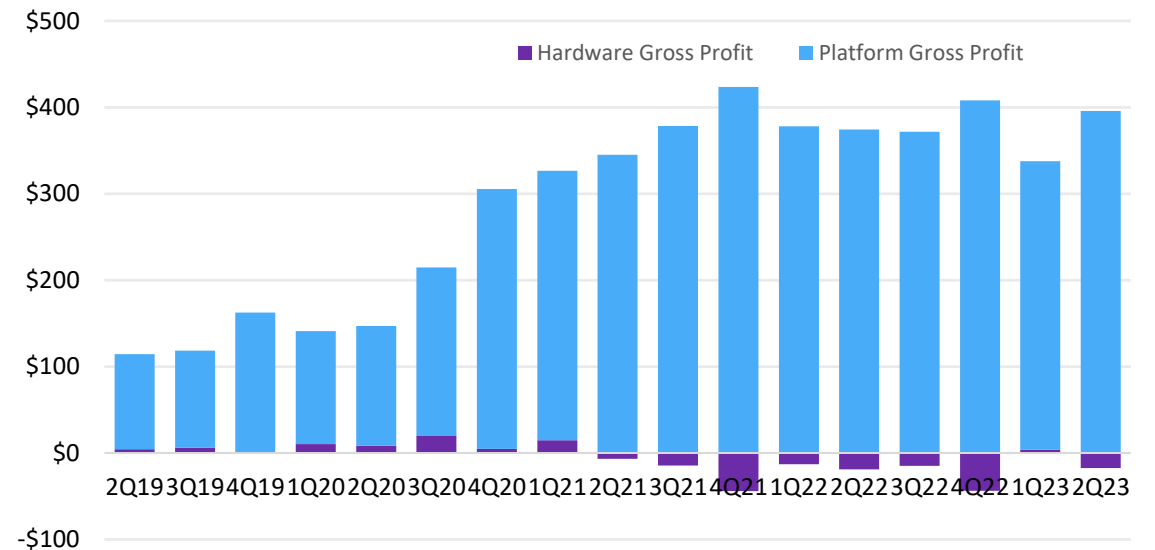
Vizio quarterly profits (\$m)



Source: Omdia

© 2023 Omdia

Roku quarterly profits (\$m)



Source: Omdia

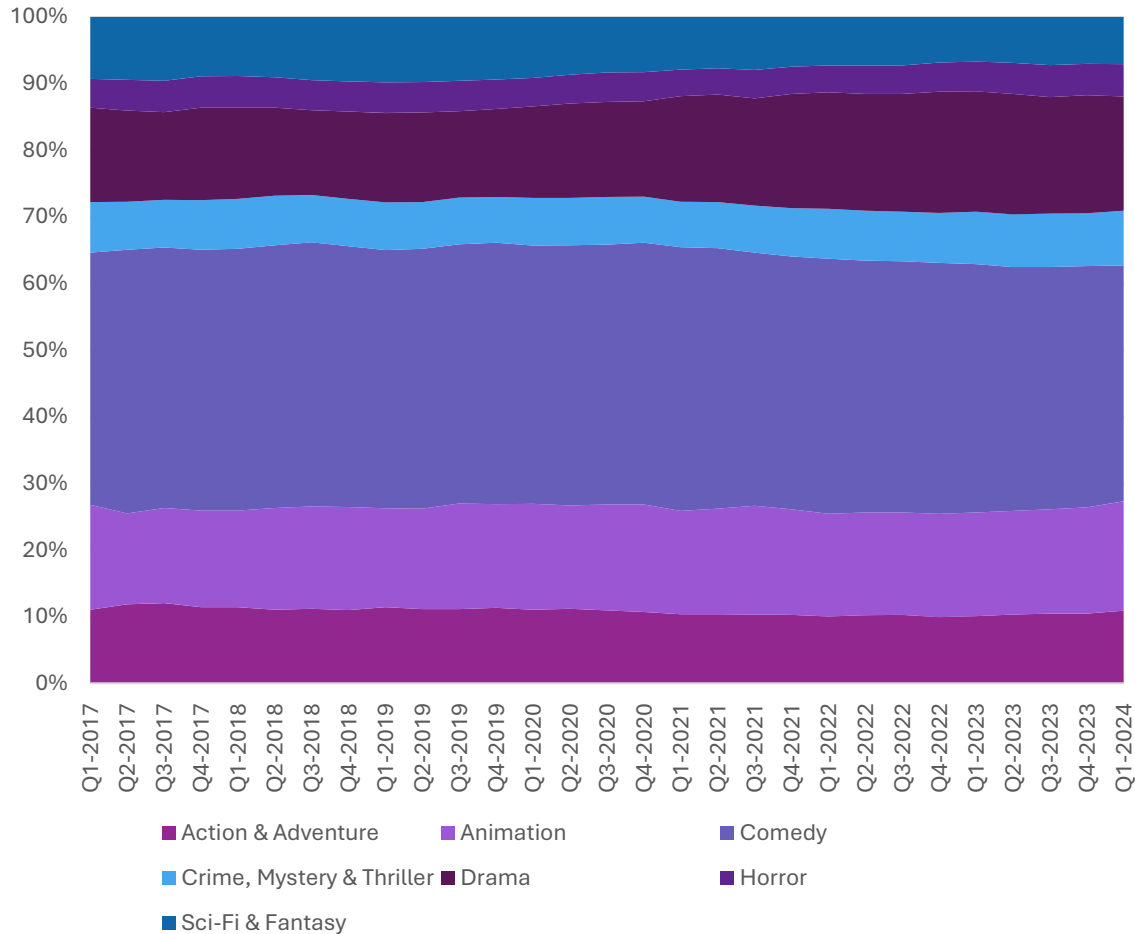
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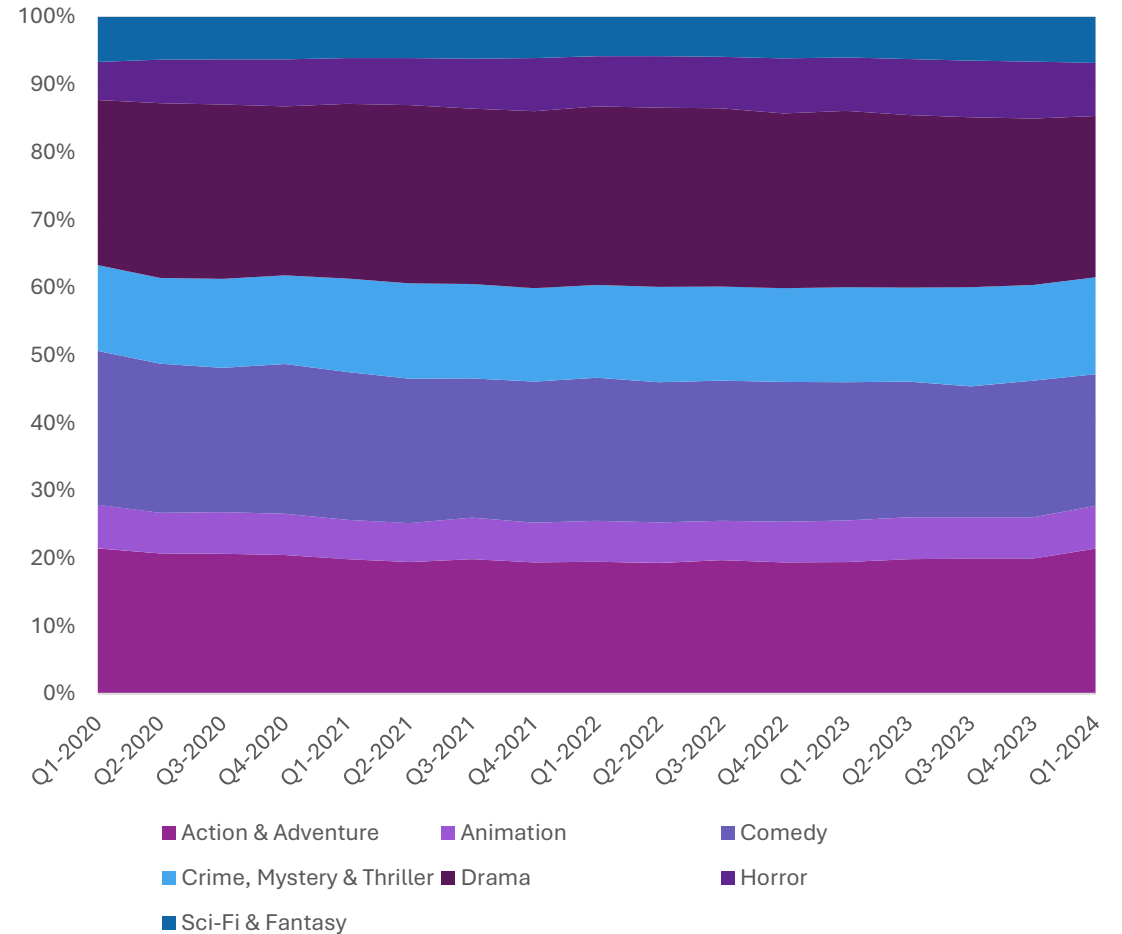
Content Trends

Content Trends (Scripted)

Share of Genre Watched - Netflix

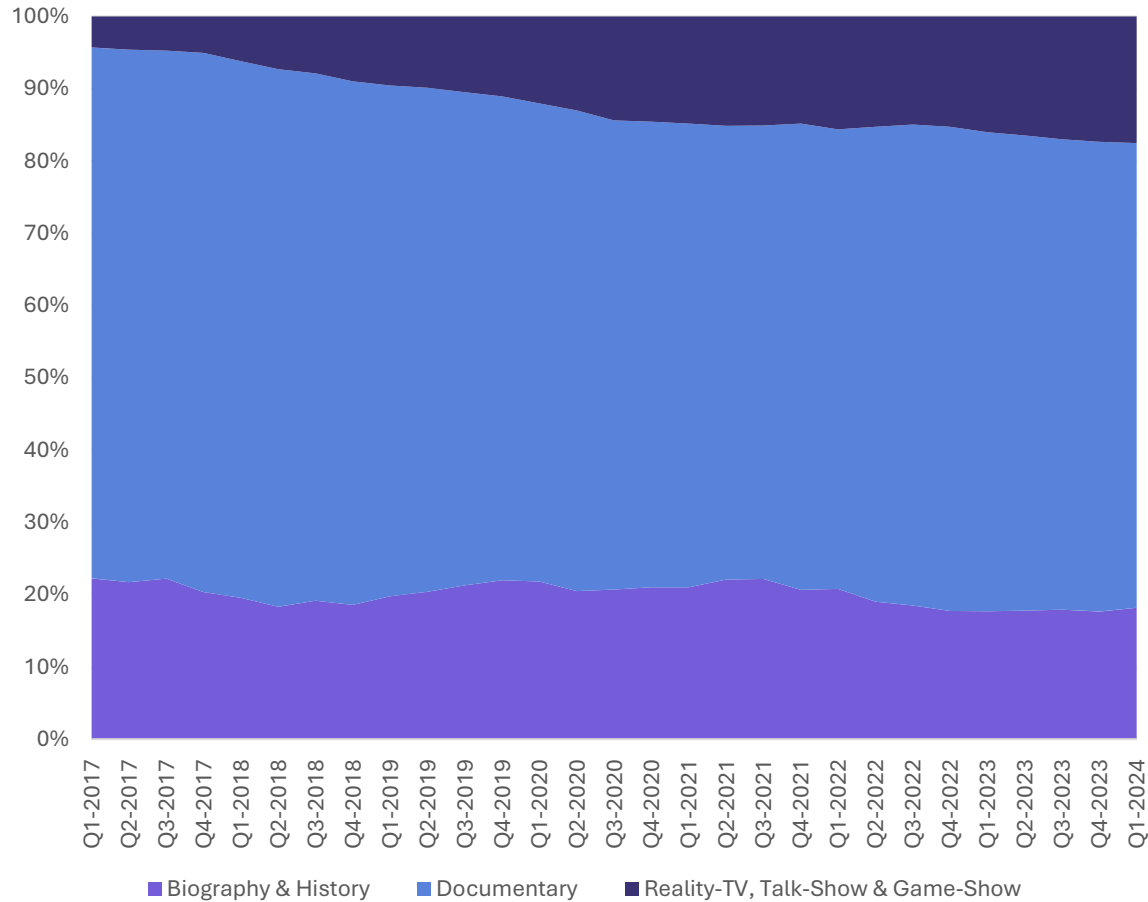


Share of Genre Watched - Disney

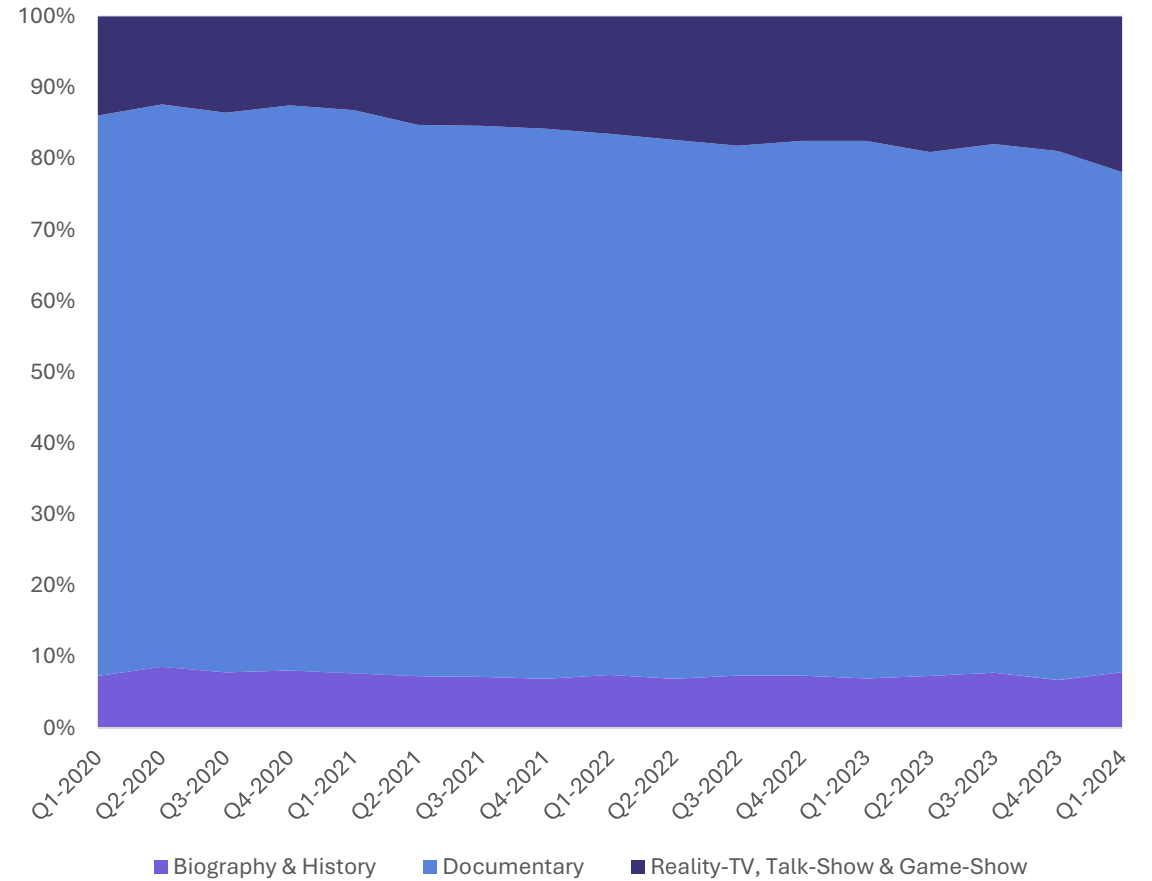


Content Trends (Unscripted)

Share of Genre Watched - Netflix



Share of Genre Watched - Disney





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Sports?

Netflix pushes into Sport?

The Netflix Slam was a three-set exhibition match between Spanish players Rafa Nadal and Carlos Alcaraz and aired on Netflix Sunday, March 3, 2024 at 12:30 p.m. PT.

Follows on from Netflix's first live-sports event of this 'exhibition format'; "The Netflix Cup".

Both formats follow effective "celebrity" sportspeople, with Nadal carrying more than 50 million followers across Facebook, Instagram and Twitter/X.



Cup viewed more by less satisfied viewers

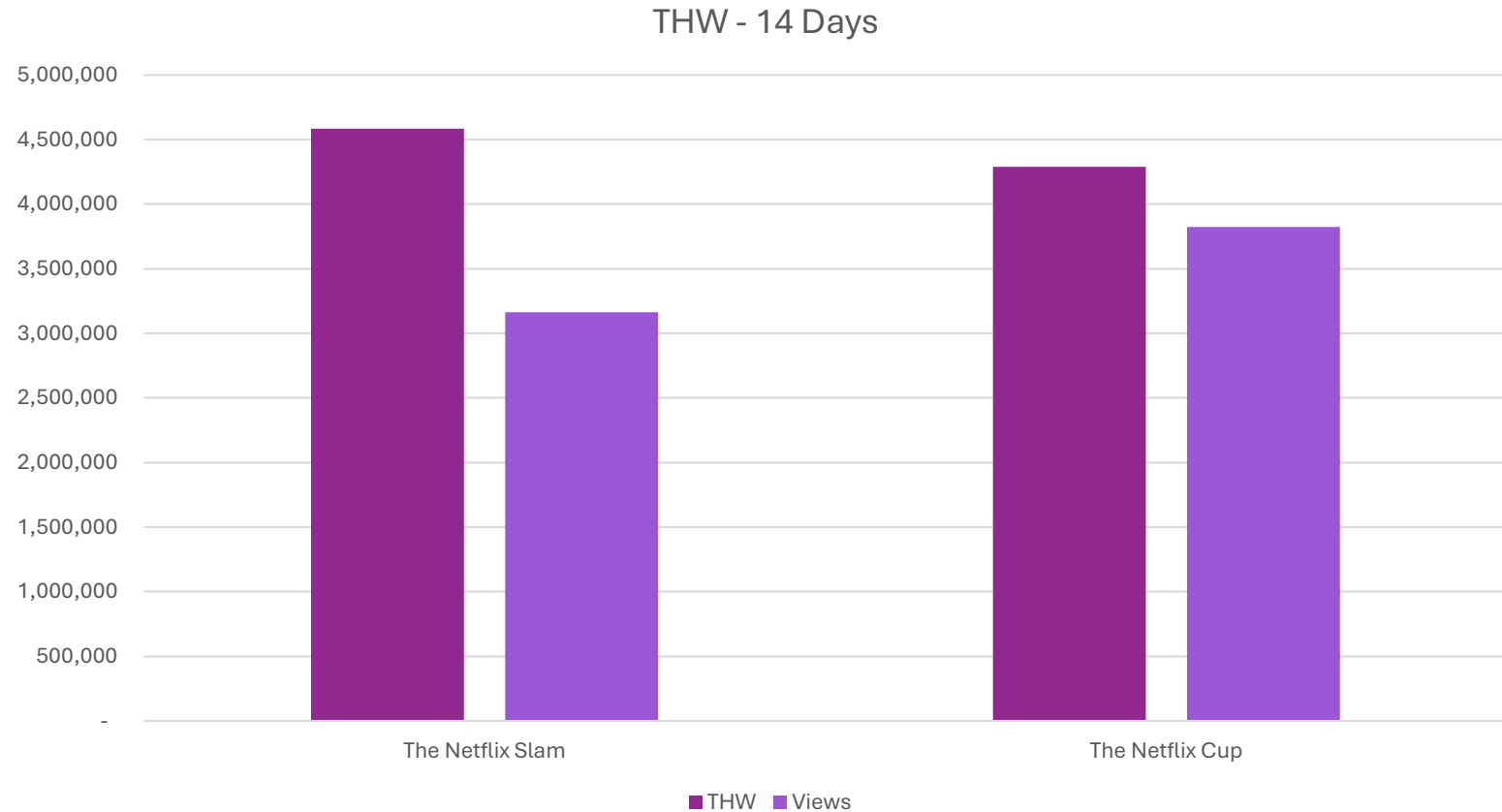
Both The Netflix Slam and The Netflix Cup ran for around 2 hours and 30 minutes.

The Netflix Cup saw slightly more views in its first 14 days than The Netflix Slam

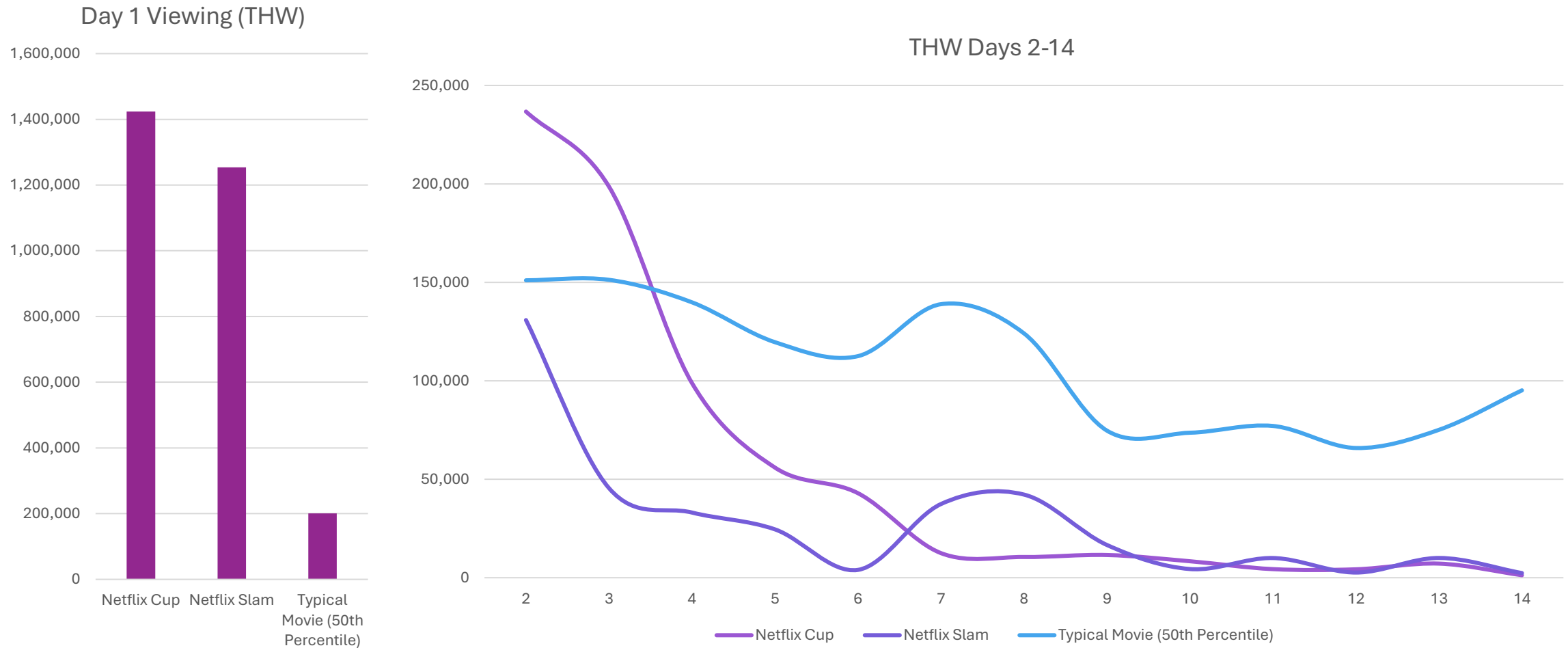
The Netflix Slam saw slightly higher time spent, in terms of Total Hours Watched.

The Netflix Slam also scored far higher in terms of popular ratings, achieving an IMDB score of 7.9/10 compared to just 3.4/10 for The Netflix Cup.

The Netflix Slam saw a higher completion rate (per view). The format of the show will have contributed to this as:



Domestic Viewing



International Viewing

In international territories, live viewing was prevalent, but lower than that which was observed in the US.

Here, local viewing times have been standardised to local LA time, to coincide with the start of the tennis match at 12.30.

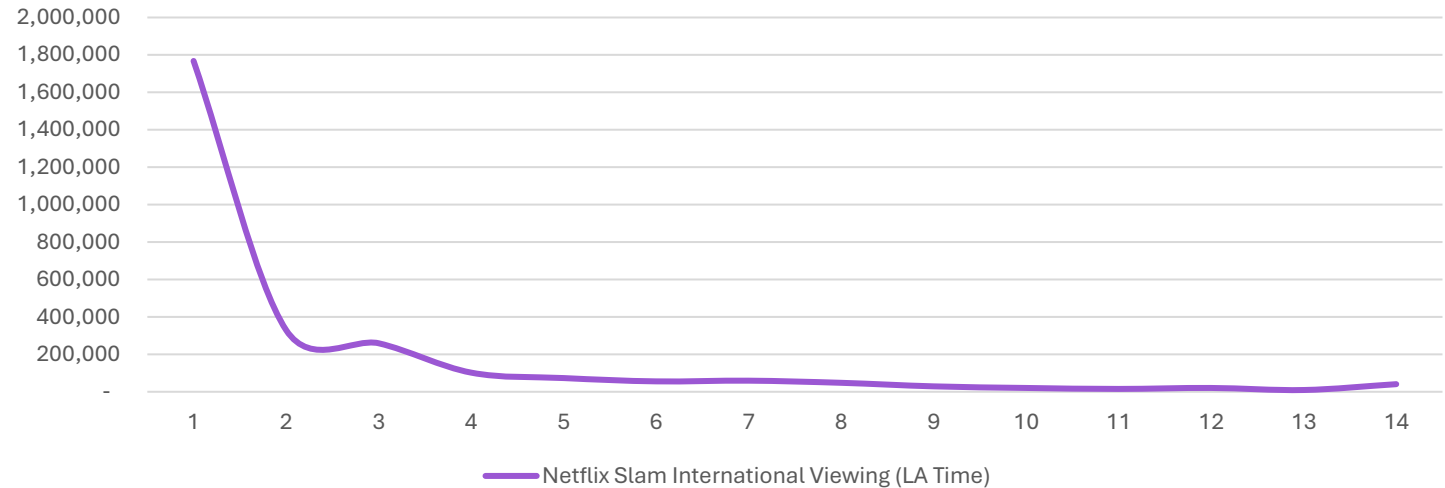
A high proportion of viewers, initiated streams within three hours of broadcast, although the vast majority did not watch live, in the same was as seen for major events, such as Superbowl or International Soccer.

While in the US 77% of viewing was VOSDAL, in international markets this was significantly lower, at 62%.

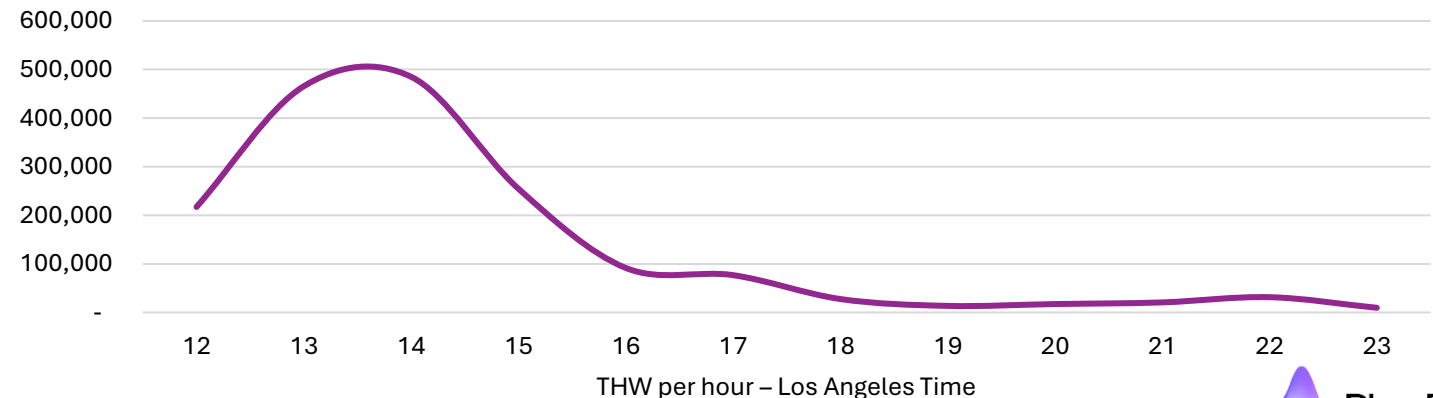
International markets also viewed the content over a longer spread of time, with viewing falling outside of 24 hours of the start of the live broadcast being higher in international territories than domestic.

Around 25% of international viewing occurred 3 days or later following broadcast.

Netflix Slam THW



Netflix Slam International Viewing (LA Time)

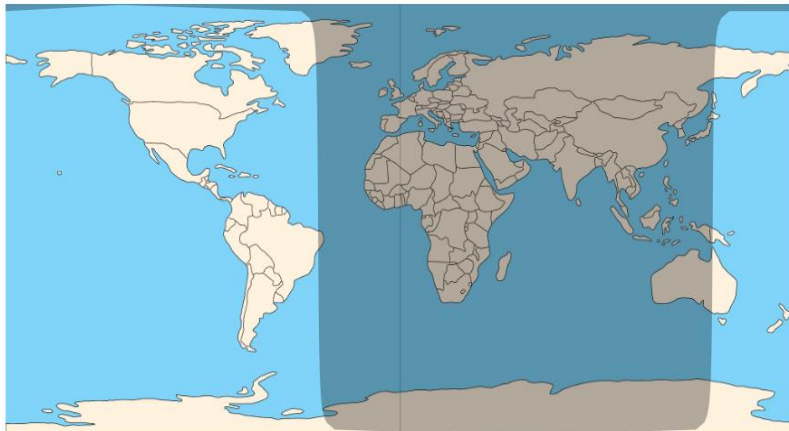
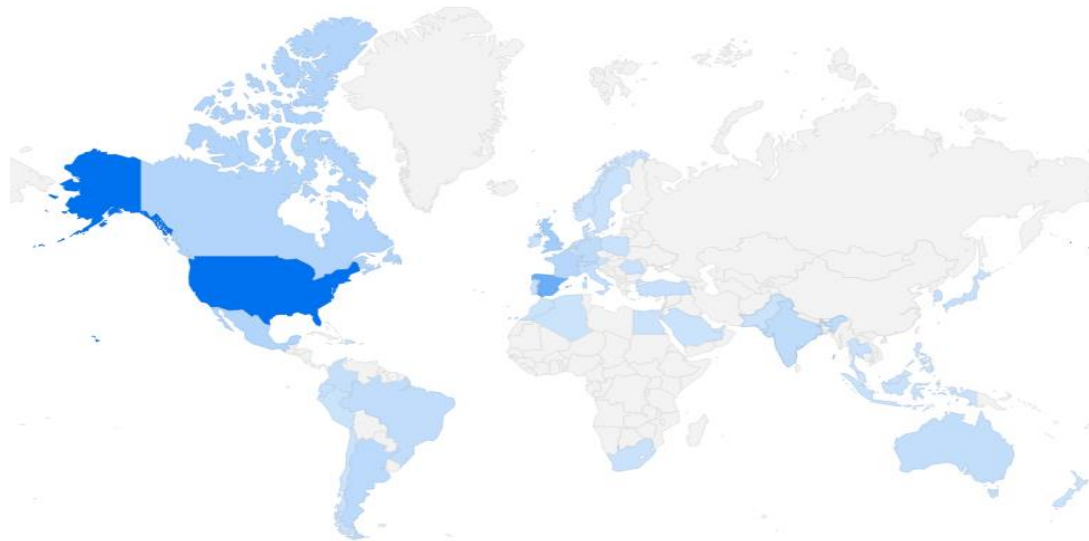


International Viewing

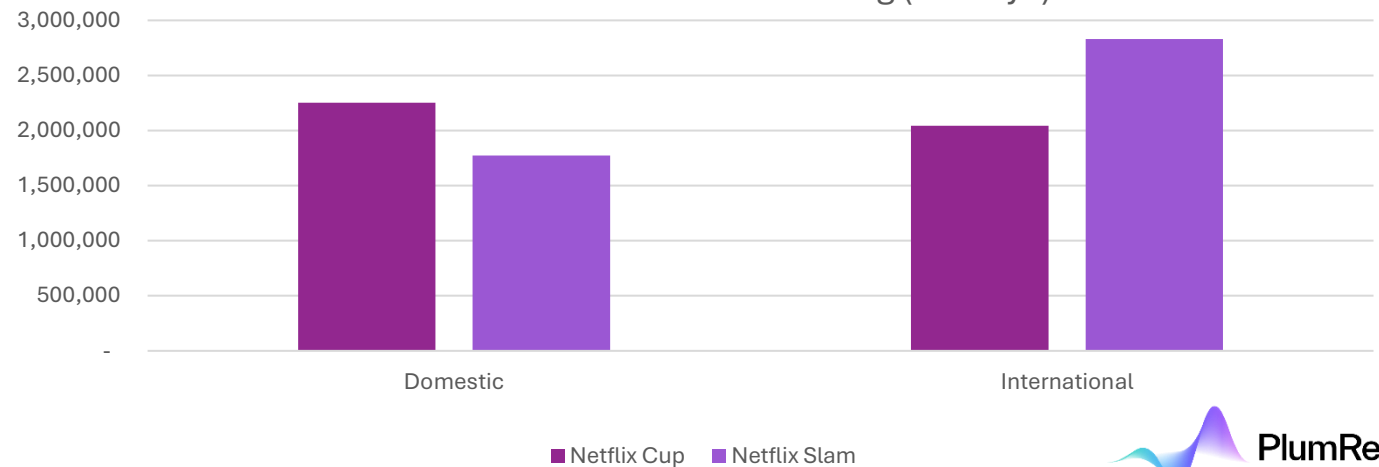
The Netflix Slam performed better in international markets that the Netflix Cup did; taking an additional 830,000 hours of viewing in the first 14 days.

Key international markets for Netflix slam include Spain, Mexico and the UK.

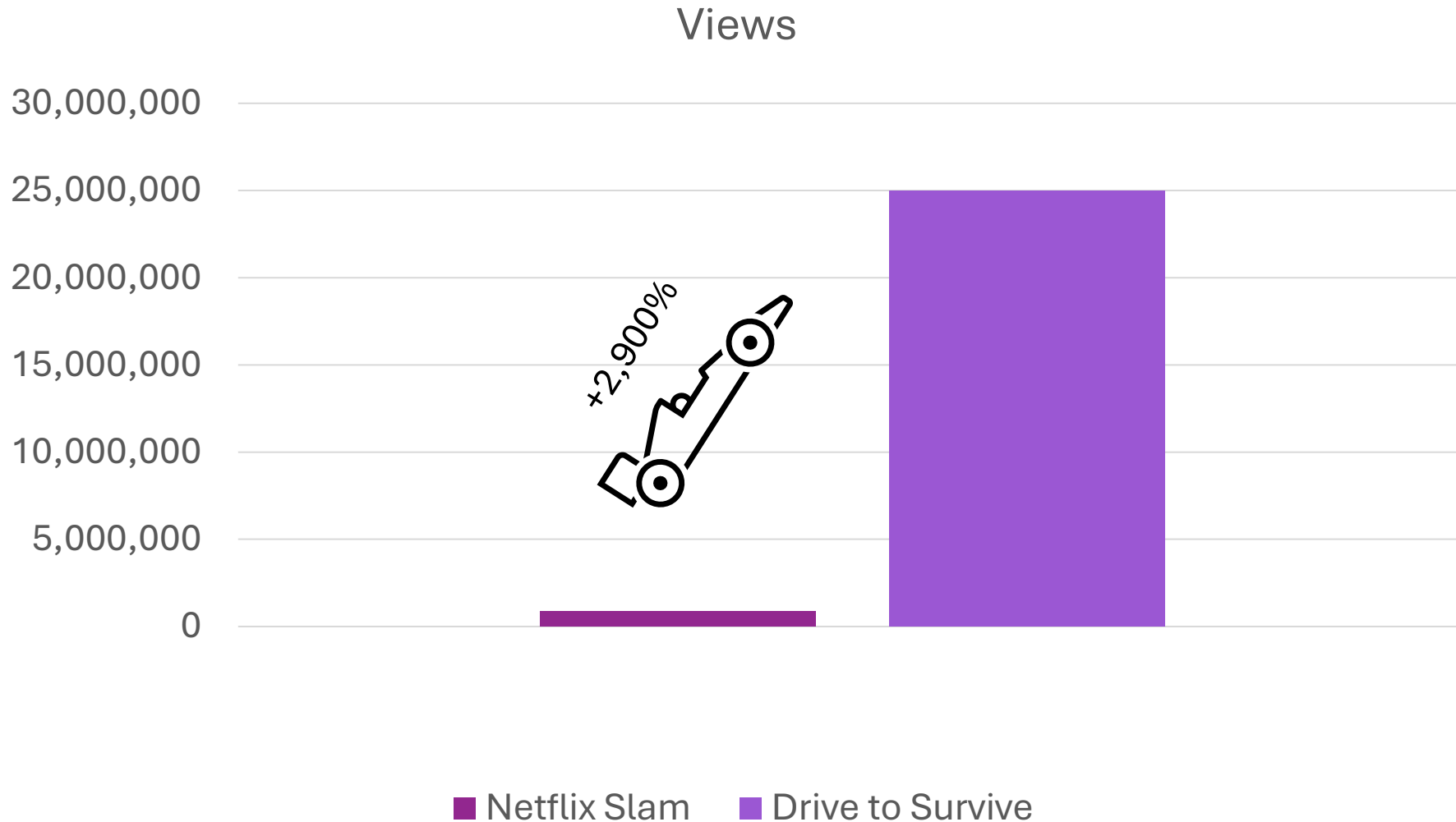
Spain, and Spanish speaking audiences including Mexico, Spanish speaking US and Argentina (relative to population metric) indexed far higher than other audiences, with around 10% of Netflix Subscribers



Domestic Vs International Viewing (14 Days)



International Viewing

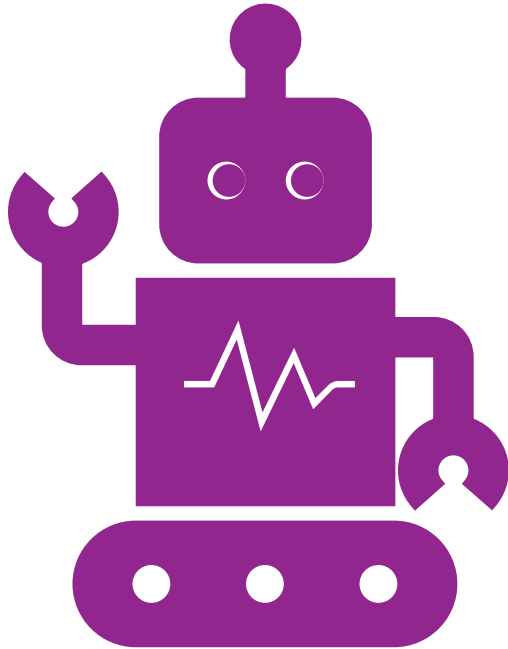




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Sora

What is it?



- New AI model from OpenAI
- The “DALL·E 3” of Video
- Gen AI video output, 1 minute of output
- Prompt via text, image and video.
- Extending, looping, modifying and interpolating.





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Interpolation



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What's Broken







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Where is AI being used right now

Pre-production

AI storyboarding software allows creation of storyboards pre-production. Textual prompts can be used to adjust elements of the scene, change sequence etc.

Content creation

On location directors can access tools such as automatic transcription, synced camera and audio streams. The goal being to supplement the crews view on site rather than replace

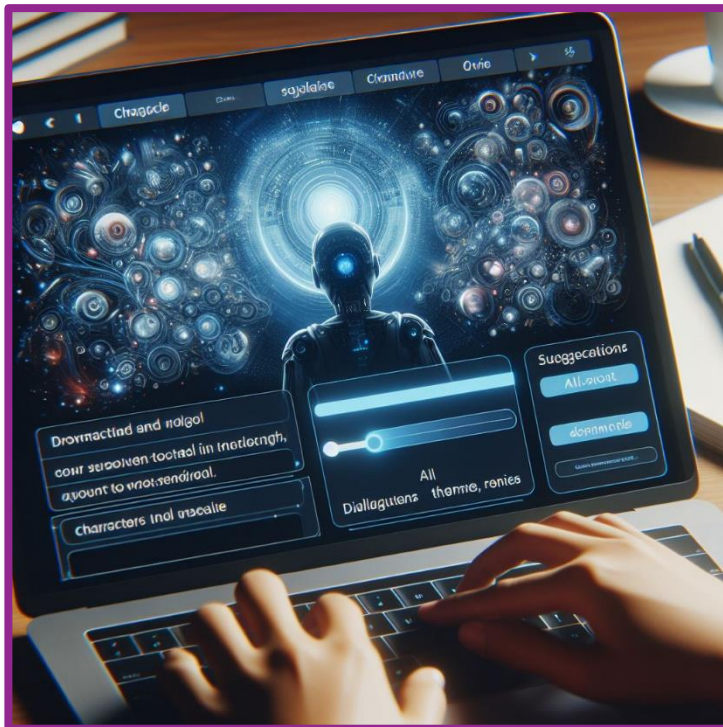
Post-production

AI tools can be employed not just for visual dynamic visual effects but also more traditional audiovisual editing tasks.

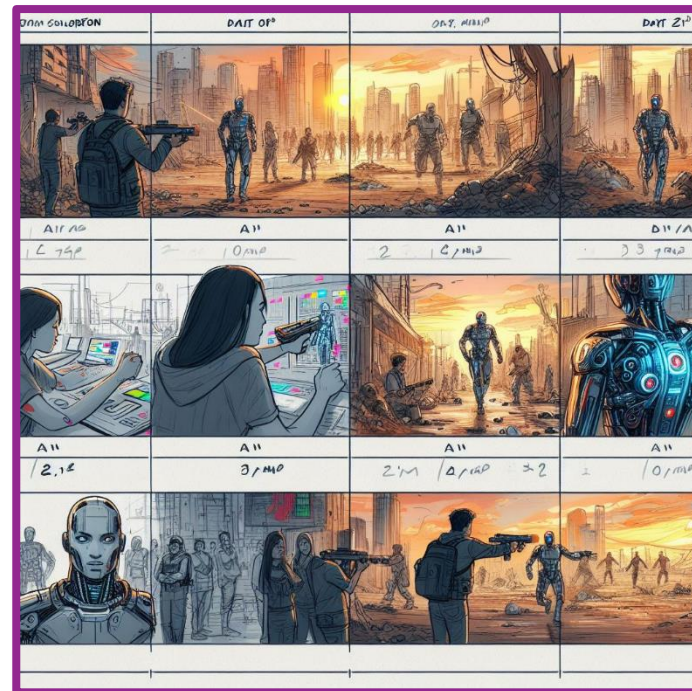
Distribution

AI can be used to track assets and even substitute assets opening new opportunities for localisation and advertising

Script



Storyboard



Scene



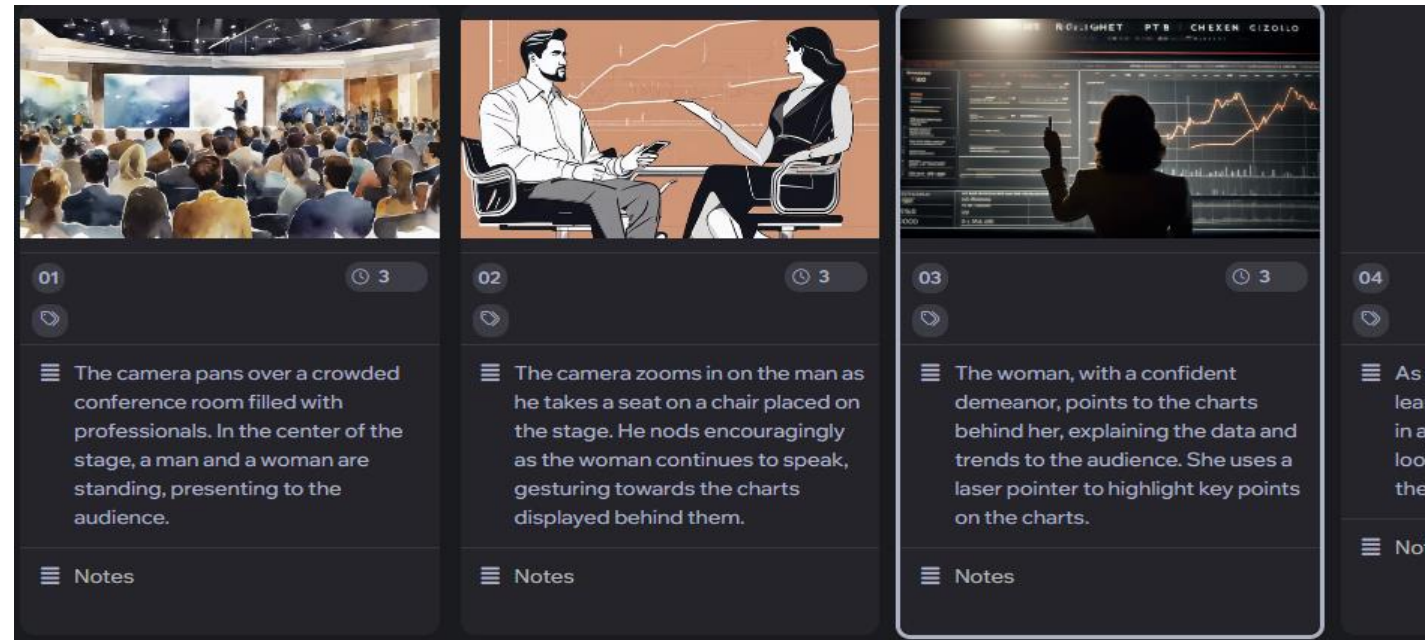
AI in pre-production: accelerating, democratizing and challenging

AI Storyboarding allows creatives to quickly move from a concept to a fully fleshed out storyboard with generative AI able to create images in a range of styles to help them visualize their ideas.

AI is not only employable in image creation but can also be used to fill in gaps in the original script, transitioning from one scene to the next.

Driven by the narrative of the creator edits to the script prompt changes to the storyboard imagery and suggested direction points.

Companies such as Cinemaflow and Boords are targeting advertising and informative video creators particularly rather than theatrical scale content production



Previsualization and location scouting

AI tools can be used to render 3D models from captured location footage to create a sandbox for directors, lighting crews etc. to explore potential locations. Two Dimensional video footage can be transformed into three dimensional models with the AI providing dynamic lighting effects allowing directors to revisualize the locations with lighting from different angles. Camera teams and directors can explore the best angles for capture and camera movement using footage captured remotely by location scouts and AI models. AI can also be used to add or remove elements from an image capture of a location to allow directors to see how a set would be affected by a change, be it another time of day, more or less people etc. allowing directors to test shots without the expense of making adjustments to a live location



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Supporting Audio



Predictive Camerawork



Virtual Production





From 6 a.m. to 7p.m.:

All texts

All voice

All music

...have been generated by AI.



RTS COULEUR 3

Couleur 3 has been preparing for this day for three months. The chain has notably tested a dozen different AI solutions, to finally retain five, including the now famous ChatGPT

This radio operation is "unprecedented in the world". There is already an AI-generated radio station - RadioGPT - but this one uses artificial voices, not human voice clones like Color 3.

AI will provide rapid analysis for teams and supporters

AI in sports opens the possibility for a range of new experiences. Using machine vision for object tracking for player and play analysis and predictive analysis for optimizing the viewing experience and providing real time predictions of outcomes. In 2023 AWS and NFL announced they will be deploying AI in 2024 Thursday Night Football

AI enabled experiences could include:

- Machine vision can track ball and player position
 - Real time analytics of player performance
 - Boundary and offside tracking
- Curate custom streams from multiple camera feeds to track a specific player
 - Custom commentary in multiple languages



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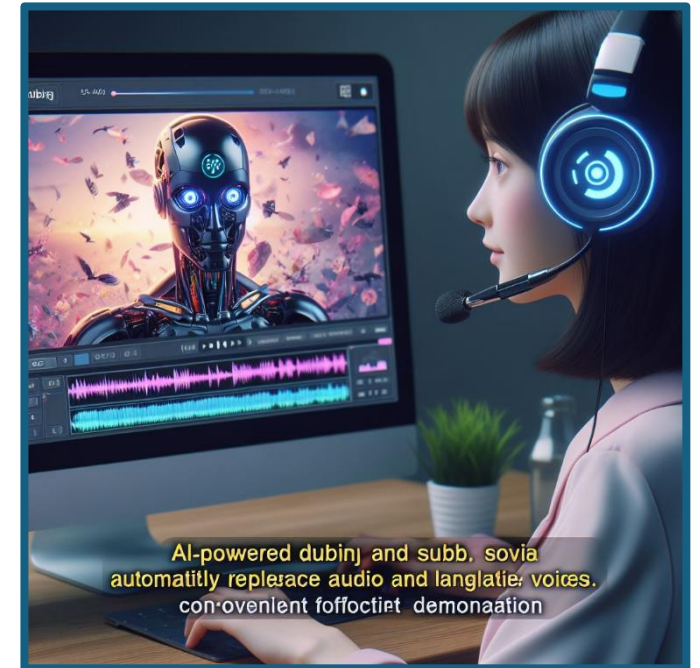
Grading, tagging and admin



Upscaling, cleaning and frame-rate enhancement



Dubbing and Subbing



AI will provide rapid analysis for teams and supporters

Adobe Sensei

In-platform Gen-AI

Auto-segmentation

Audience design

Da Vinci resolve

Editing, color correction

Facial recognition

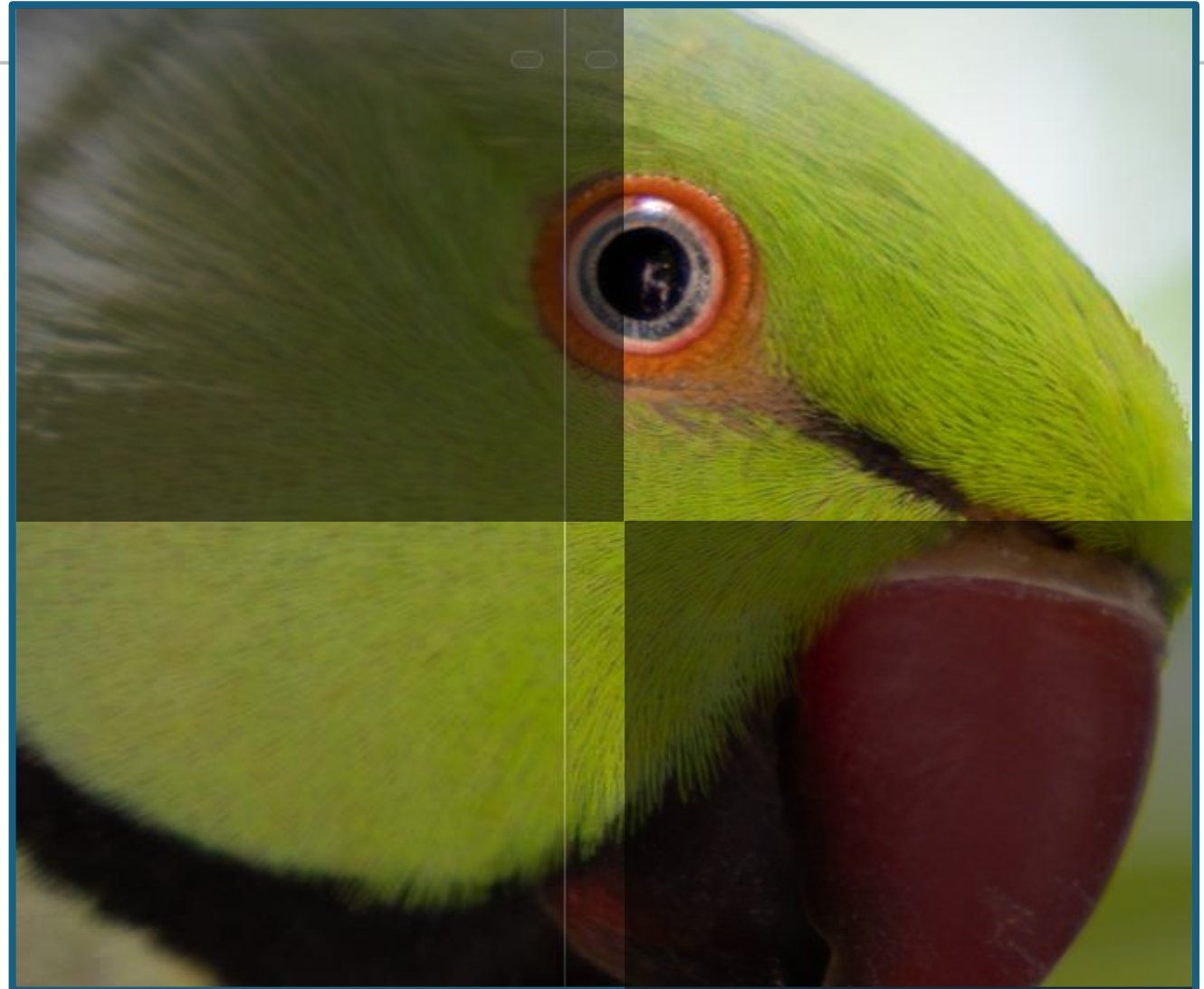
Auto-reframe

Topaz labs

Upscale

Recolour

Reduce Noise

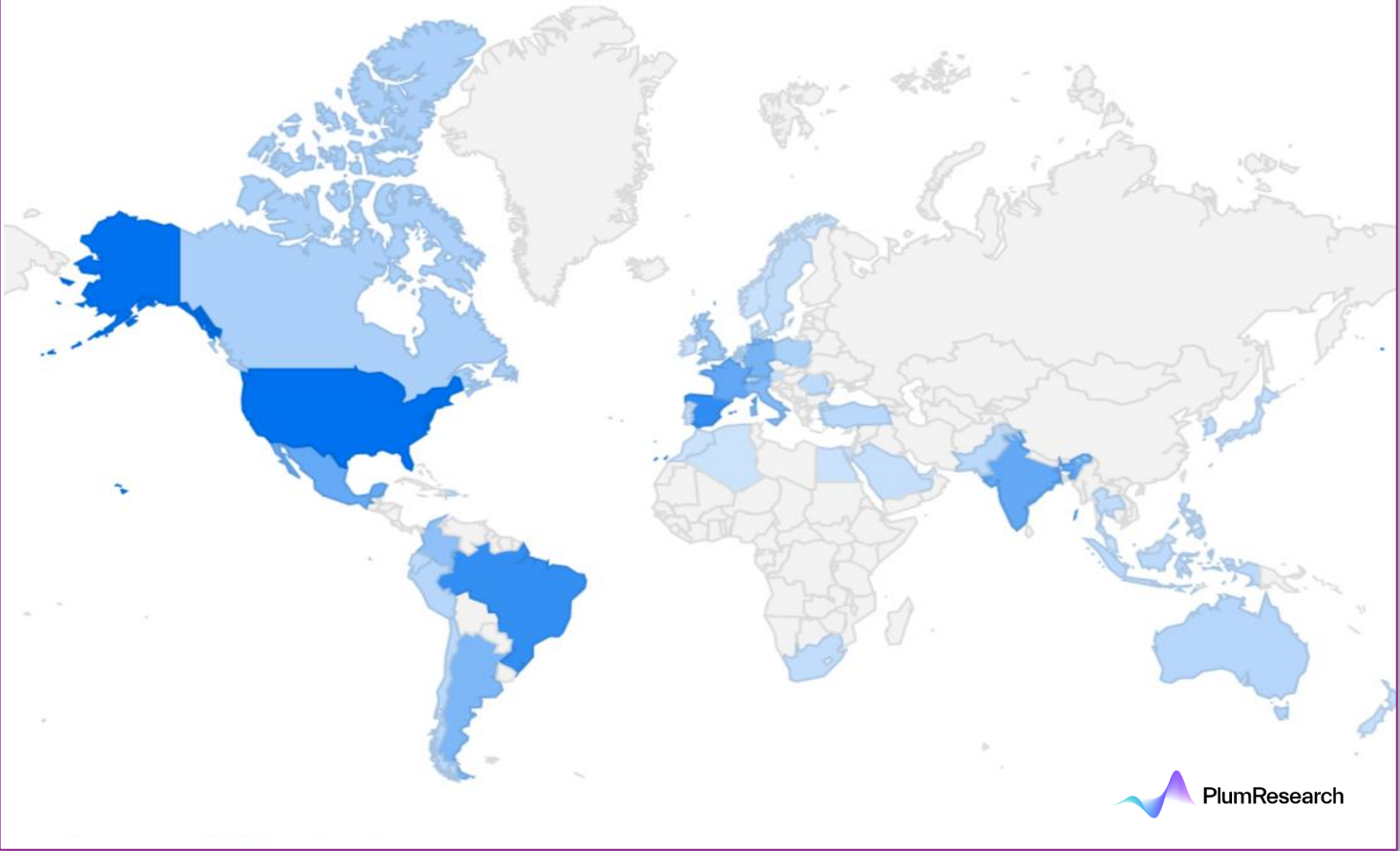


AI changing game for dubbing : The increased demand for international content (such as Korean, Spanish dramas) will drive captioning and subtitling services

Global: Preferred way to watch foreign-language content

Arabic-speaking	Sub-title
Argentina	Dubbed
Australia	Sub-title
Austria	Dubbed
Belgium- francophone	Dubbed
Belgium-Flemish	Sub-title
Brazil	Sub-title
Canada-English	Sub-title
Canada-French	Dubbed
China	Sub-title
Czech Republic	Dubbed
Denmark	Sub-title
Finland	Sub-title
France	Dubbed
Germany	Dubbed
Greece	Sub-title
Iceland	Sub-title
India	Sub-title
Indonesia	Sub-title
Ireland	Sub-title
Israel	Sub-title
Italy	Dubbed
Japan	Sub-title
Lebanon	Dubbed
Malaysia	Sub-title
Mexico	Sub-title
Morocco	Dubbed
Netherlands	Sub-title
New Zealand	Sub-title
Norway	Sub-title
Poland	Sub-title
Portugal	Sub-title
South Africa	Sub-title
South Korea	Sub-title
Spain	Dubbed
Sweden	Sub-title
Switzerland	Dubbed
Thailand	Dubbed
UK	Sub-title
US	Sub-title

Spanish Titles – Hours Watched



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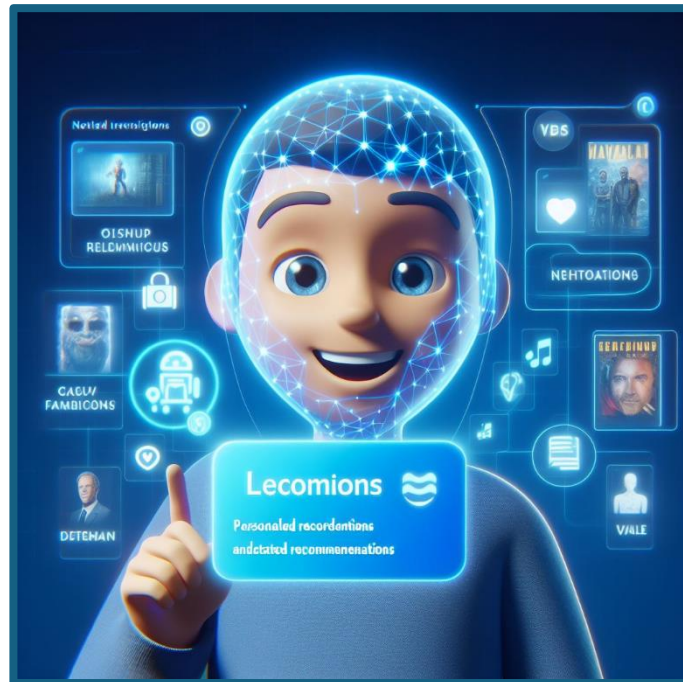
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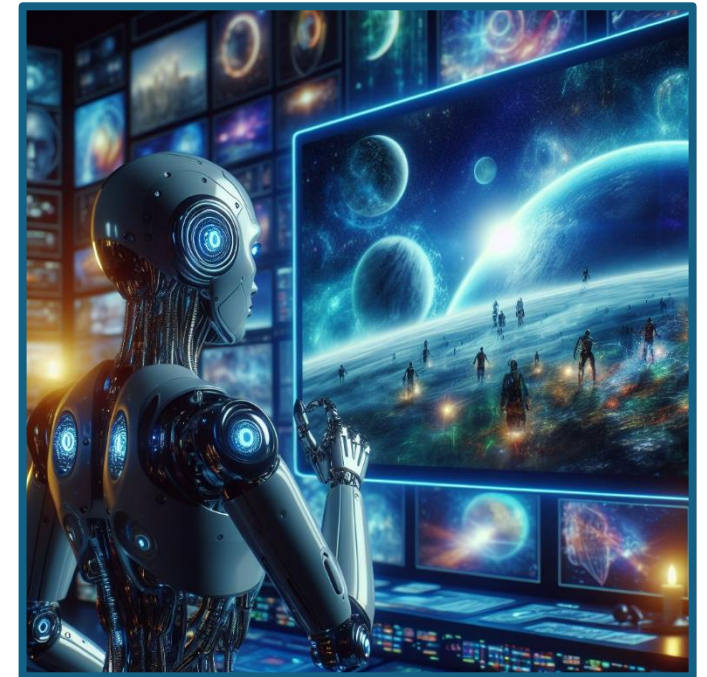
Recommendation and Discovery



Dynamic Delivery



Trailers and Clips



Choose the 'best'

Problem,
resolve:

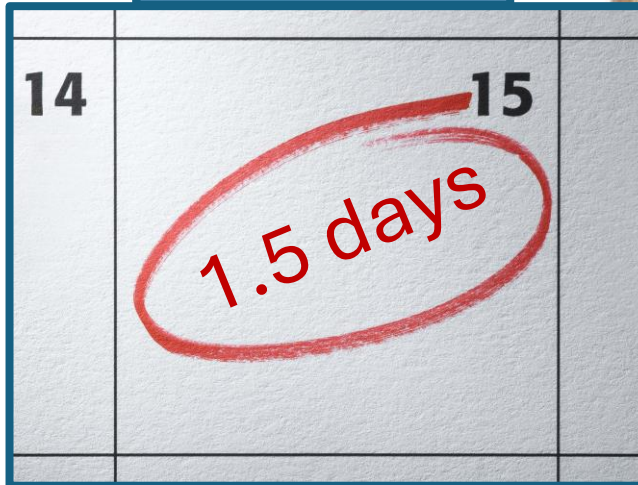
General tastes

Mood

Audience

Library

18 minutes



Emotive input context



"I want a happy movie"



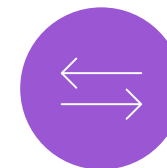
Dad has entered the room



There are too many options



But what does everyone want to watch



I just feel like something different

Choose the 'best'

Problem,
resolve:

General tastes

Mood

Audience

Library



Emotive input context



"I want a happy movie"



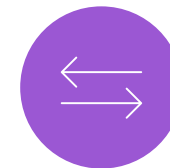
Dad has entered the
room



There are too many
options



But what does
everyone want to watch



I just feel like
something different

Recommendation Engines and AI:

Deep Discovery



- Mood, Tone, Theme and Time Period
- Topics from the content
- Popularity Scores link older titles to trending content, Social and cultural topics
- Quantitative and qualitative insights into content relationships



Accessible Content



- Low vision mode to watch content:
 - Colour rebalance
 - Edge highlighting
- Rebalanced Audio



Affectionate Intelligence:



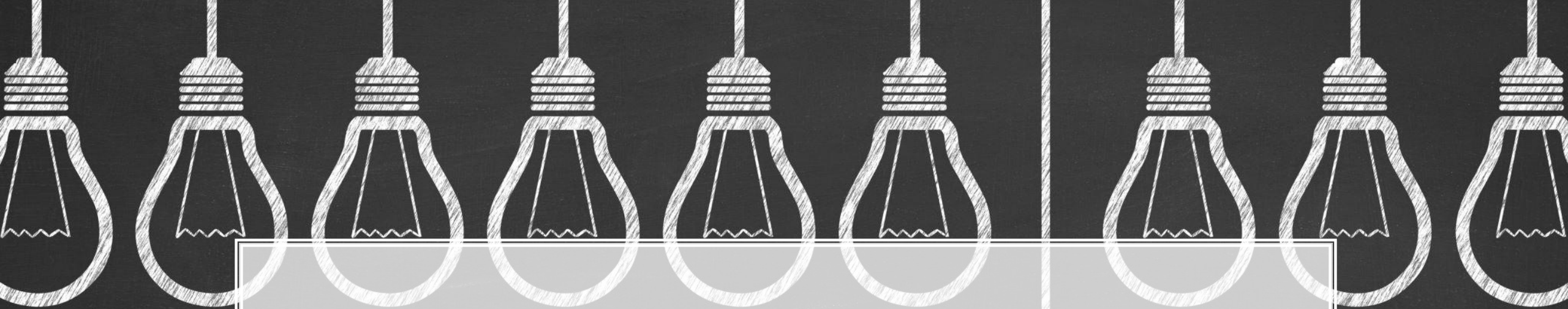
- Data from all smart products and IOT
- Behavioural patterns resolve to understand emotional state
- Combined with personal bot - ChatThinQ



AI Automation of Clips and Local Advertising



- Amazon's Zero-Shot Virtual product placement project offers a window into how AI can help further monetize content through localisation
- Amazon's technique focuses on the replacement of 2D assets in the background of an video such as posters, magazine covers etc.
- The current proposition is limited to 2D assets because of the limitations of 3rd acquired content utilizing single view captures
- In the future of Multiview capture are employed, similar techniques could be employed to render 3D assets into content post production
- This technique could allow distributors to insert localised advertising assets into contents in post production, replacing tagged objects. While some object replacements will not affect the narrative it will be important for creators to consider tone.



Mwasi Wilmore - CEO / Ubongo:
“Exceed expectations. The future
belongs to those that dream.”

Thank You!

Jonathan Broughton

Research Director

Plum Research



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