

A Taste of Money: Popular Culture and the Economics of Global Television

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INTRODUCTION

One of the central images of modern political analysis, whether engaged in by allegedly detached social scientists or by political ideologues, is that of the export of culture. The idea is that the structures of relationships which have evolved in the modern world involve not just those of economic links, military liaisons, politically inspired coups d'etat, and economic domination, but also linkages of culture. The proposition is that though the export of cultural products from a relatively small number of countries to a much larger number of recipients, principally, but not only, in the form of television programs, one is witnessing the wholesale transfer of meaning, the generation and shaping of political consciousness with the effect, partially intended, of refashioning the world in the intellectual and political likeness of the exporter. The villain of the piece is usually held to be the United States, and this theme appears in the works of a number of key writers. Here one thinks of Herb Schiller (1969) and Cees Hamelink (1983), though the list of such theorists could be extended enormously.

The fact of the matter is that almost all of those writings are conceptually inadequate and methodologically untested. In fact, much of the discussion about the role of television in the construction of meaning within modern society rests on a sense of there being two underdeveloped worlds: the

underdeveloped world defined by geography (Asia and Africa, Latin and South America), and the culturally and intellectually underdeveloped world of the captive populations of the developed societies. Astride these myriad minds, it is held, are the colossi of the superstates and their ideological arms, the cultural industries. What we have portrayed here is a vision of dominance, of cultural imposition, which curiously, at least to my way of thinking, contains much that has to be explored and worried over, but also much that provides the husk within which one finds the seeds of paranoia.

Recently there has been a reassertion of the theme of cultural dominance (as new distribution technologies seemed to make such dominance even more inevitable). In Britain, indeed throughout Europe, we have lived for some time with the widespread belief that two things were about to happen: one, that the sheer "space" for television was "about to expand enormously"; and two, this space would be filled with "wall-to-wall *Dallas*." It is a thesis which has been spoken of in countless conferences, seminars, books and pamphlets, and mouthed so often and loudly that it has been transformed from postulate to certain truth. It is a thesis which has shaped not just public debate, but the decisions of governments, corporate planners, media moguls, and would-be media moguls. And when the eyes of the interested observer have been raised to take in not only the terrain of the so-called first world, but also of the two-thirds world, the scenario has appeared even more powerful. The scenario involves smothering of indigenous cultures by a lava stream of international television spewing forth from the mouth of the Hollywood volcano, with the only applause at this spectacle being the loud clapping of the new media moguls, producers, and distributors of the images and sounds of the global village.

Having looked at the available evidence to support or contest this thesis, evidence which I admit is patchy and variable in the extreme, I am led to conclude that there is an urgent need to challenge some of the prevailing orthodoxies about the present and the future of television.

Hidden within the "inevitable dominance" thesis are, I suspect, two deeply questionable assumptions. The first assumption is of the power of television, and the view that it can override all other institutions that make up human society—can, as it were, imprint itself like a colossal seal on the soft wax of the global mind. This assumption is, of course, fed by the sheer ubiquity and visibility of television, and the fact that the other threads of influence within people's lives remain unalterably invisible. The second assumption is of the ubiquity and popularity of United States television. The significance of that phrase "wall-to-wall *Dallas*" lies precisely in the fact that it captures the vision of hell which is the waking nightmare of many a political and cultural global elite. Both assumptions, however, lack conceptual and empirical depth, and utterly misconceive the place of television within social influences, and what the populations of the world enjoy on television.

It is from within that framework of acute skepticism about the worth of the contemporary discussion of television of any kind that this chapter has been written. I was asked to look specifically at some of the noneconomic dimensions to the question of whether it is "inevitable" that the "rich countries" will dominate the global production and distribution of televisual product. I am not quite sure *how* "rich" is rich in this context, though I take it to mean to a considerable extent the suggestion that a country, not a million miles from these United States, is more likely to dominate world television markets than say Burkino Faso, or even that other third world country in the making, the United Kingdom.

My immediate response is that there is nothing inevitable, as distinct from likely or theoretically possible, about such domination. It is in any case wrong to see "rich countries," in television terms as coterminus with the United States and to a lesser extent the Anglo-European societies. Ample evidence exists of diverse flows of product, with quite complex hemispheric and regional influences, such as Brazil in South and Latin America, Egypt in the Middle East, between countries of the EEC, and also within the Eastern "bloc." I will also suggest that this plural structure of production and distribution is in its infancy, and will grow as the century proceeds and television markets evolve. This arterial structure of global television will be nurtured by the sheer force of local and national cultural tastes. I am not for one minute suggesting that there will not be much U.S. product whizzing round the globe in future decades. I am simply suggesting that there is historically an overemphasis on the ubiquity and presence of U.S. material, and a gross overestimation of its strategic strength.

In this chapter, I want to expand on the thread of these thoughts in the following manners:

1. By considering evidence of the existing availability of international television, and to a lesser extent video.
2. By pondering the evidence to support the argument that what will really make the difference in the future are the new media of satellite and cable.
3. By examining what we know of the ways in which the television audiences, in different societies, make choices about programming.
4. By assessing the kinds of responses which broadcasting institutions of the world will make, in the light of national policies, their own self-identity and their deeply felt need to survive.

OFFERINGS:

THE GLOBAL PATTERNS OF TELEVISION DISTRIBUTION

Just how dominant is television from "rich" countries at the present time? The most basic evidence is that contained in the research organized on behalf

of Unesco by Tapio Varis (1984). Varis' study, which covers some 69 countries, updated a similar survey completed a decade before. Varis finds few overall changes since 1973 in the pattern of program flows, but indicates a trend toward greater regional exchanges along with the continued dominance of a few exporting countries. The 1972-73 study showed that there was, in effect, a "one-way flow" of television programs internationally, from the North Atlantic basin to the rest of the world, dominated by entertainment. In his updated study Varis used as a sample the two weeks for January 31 to February 13, 1983. His analysis is without doubt the best guide we have to the general distribution of television around the world, and has been used both rhetorically and analytically to support the proposition that flows of television are overwhelmingly unidirectional. Certainly he shows that overall, imported programs average one-third or more of total programming. My own reading of the Varis data, however, is that even in its necessarily limited nature it consists of something far more substantial and complex than the mere froth of argument and analysis which we have so far seen. He shows, for example, that in all parts of the world, while there are countries that are heavily dependent on foreign imports in their programming, there are those that are only slightly dependent.

In the Americas, the U.S. imports little—about 2% of its total television output—and mainly from the United Kingdom, Mexico, and Latin America, whereas in Canada the vast percentage of the imported material is from the United States. In Latin America, entertainment programming dominated all of the television studied, accounting for about 50% of total transmission time. Most of the imports were entertainment programs: 75% of the imported material is from the United States; 12% from Latin America; a few percent from Europe. In Western Europe, there are important differences between countries. Overall, 30% of television programs are imported, 44% of which are from the United States, with U.S. programs accounting for 10% of total transmission time in Europe in 1983, though much of that is outside prime time. Sixteen percent of imports of television into Europe are from the United Kingdom; Germany and France providing 5%–10%; Eastern Europe and USSR 3%.

According to Varis' data, 14% of entertainment programs are imported, and in Eastern Europe programs are imported from 26 countries, 43% from other Eastern European countries, and 57% from outside that area. Twenty-one percent come from the USSR. In Asia and the Pacific, 36% of all television is imported, but the variations are enormous between countries: For example, from 75% for Television New Zealand's (TVNZ) Channel 2 to 3% for a Calcutta station. The United States and United Kingdom are the main source of imported programs, along with Japan for children's programs, documentaries, and movies, and films from India, Hong Kong, and Taiwan. China produces almost all of its own television, with a little educational and news material from the United Kingdom.

In the Arab countries, the Varis study reports that 42% of television is imported, one third comes from other Arab states, and of 32% of non-Arabic imported programs France provides 13%, the United Kingdom, Japan, and Germany provide 5-7% each, the USSR less than 3% and other socialist countries about 1%. Of the Arabic countries, the most important source of imports is the United Arab Emirates (10% of imported programs), followed by Egypt (6%), Saudi Arabia (4%) and Kuwait (4%).

In Africa about 40% of programs are imported, though again there are wide differences in volume between individual countries. Of the imported material, 50% comes from the United States, 25% from Germany, and the rest from Western Europe. In South Africa, 30% of programs are imported: 54% from the United States, 30% from the United Kingdom, 9% from France, 5% from Austria, and 3% from Canada.

In both Western and Eastern Europe, according to the Varis study, more than 40% of imported programs originate within other countries in the region itself. In both regions the superpowers predominate: with the United States providing 40% of Western European, and the USSR 20% of East European imports. The most notable increase in regional exchange over the course of the 10 years of the two studies is, however, among the Arab states, with one-third of imports originating from within the region, and among Latin American countries, where the figure for regional exchange is said to be 10% and apparently growing.

I relate these details because they present a general picture of television flows which is not a one-way street—rather, a number of main thoroughfares, with a series of not unimportant smaller roads leading off of these. What is clear above all is that television as an international communication system is far more complex than is sometimes assumed, even when dealt with in the very general manner necessitated by the Unesco studies. We have at least to allow for flows within flows, patterns of distribution, which Varis' work hints at, that do not fit the familiar, simplistic model of the total domination of international television by the United States. Even at the simple level of just counting which programs are going where, that idea is simply not true. There are alternative sets of influences and movement within Latin America, within Europe, within Asia, within the Gulf states, and within the Pacific Basin. One cannot simply pretend that those do not exist, nor that they may not denote something rather more significant than a blip on the graph.

Even when one looks at the available evidence of programming for that most recent of televisual phenomenon, videocassettes, the patterns do not support the thesis of the total domination of video software by U.S. programming, though there does seem to be proportionately more of it than is the case for television (Alvarado, 1989).

At the end of 1983 there were an estimated 40 million viewers in the world, and the VCR enjoyed a growth rate much greater than that of the

TV. The Gulf States, for example, are an important area for the use of video-cassette recorders to watch television and films from other countries (Boyd, 1985). The penetration rate of VCRs in Saudi Arabia is about 85%; one study in 1981, which surveyed 120 people, they *all* had VCRs. In a survey in the Red Sea City of Jidda, 19% had two machines (Boyd, 1985).

There are basically two types of material available on videotape. In the first instance, there are large quantities of western television programs and feature films. At the time of Douglas Boyd's research, the latest episodes of *Hill Street Blues*, *St. Elsewhere*, and *The A-Team* were readily available, as well as such movies as *E.T.* and *Terms of Endearment*. All of it was pirated. Similarly, every evening's total BBC output is taped and flown out to the Middle East the following morning in a private plane. Pornography is also acquired from London, Paris, and Frankfurt. There is also extensive pirating of Arab television programs and films, particularly those from Egypt. As one observer noted: "In the tumultuous arena of Arab politics, the soaps are a soft-sell commercial for Egyptian values, and thereby a vehicle for Egyptian influence. They are a reminder to the Arabs than even when Egypt's political course is in disrepute, Egypt is still number one among the Arab States" (Viorst, 1984). The success and influence of Egyptian television follows in the wake of the success of its films which

paved the way. . . by promoting the faces of its stars, the voices of its singers and the tales of its writers in every Arab city and town. Even more importantly, it spread a familiarity with Egypt's dialect. Thanks to the movies, the Arabic spoken by the Egyptians has come to dominate a language spoken in a hundred different ways in the Middle East. This dominance now virtually precludes any other Arab country from successfully establishing an entertainment industry of its own. An Egyptian TV producer observed: The rich markets for state TV are in Saudi Arabia and the Gulf and (Egyptian TV) will not produce anything that will alienate the Saudis. The Saudis only want things that could have been shown in the Middle Ages. Like all Arab governments, they want to promote the status quo. So that is what we give them. (Viorst, 1984)

In many Asian societies, governments are becoming worried that the use of VCRs is undermining development goals. For example, in Malaysia 75% of the viewers of VCR tapes are the Malaysian Chinese population. The government is trying to weld together a number of cultures through the use of a national language, Bahasa Malaysia, but the Chinese prefer Chinese language tapes from Hong Kong to the Bahasa Malaysia-dominated television service, a fact which is less than pleasing to the authorities. In 1982 the information minister, Abid Adam, expressed his fears that messages from the government were not reaching the people and that the loss of the television audience to video might "hamper government efforts to disseminate national aspirations and values and channel information to the people."

In a piece to the *Star*, a Malays daily newspaper, on June 21, 1983, Adam warned that videotapes could expose people to policies contrary to government policies and national culture, hurt television news and information, and hinder the government's efforts to foster racial harmony. The counter accusation, however, was one when an audience begins to flood away: The TV was boring. Equally, in Indonesia, the reaction to the impoverished character of the television service has been to turn more and more to VCRs: "Indonesian authorities are also concerned about Western video, constantly warning the public against 'cultural and political pollution' from abroad, particularly Communist propaganda from China" (Lent, 1985). In Islamic cultures the VCR is also playing havoc with traditional values and morals. Middle-class Indians also are now extensive viewers of programs using VCRs, including a good deal of U.S. material.

Writing about video in Asia, John Lent (1985) pointed out that in Singapore, 45% of the population watches less television produced by the Singapore Broadcasting Corporation now, preferring videocassettes, particularly Chinese language tapes for the predominantly Chinese population. What worries the Singaporean authorities in particular are the uncensored Western cassettes contrary to official guidelines on the portrayal of sex and violence, and the fact that people are reading less and watching more. The flight from government-dominated, worthy, development-oriented television to Western-dominated videocassettes also worries many Asian governments because of the frustration impact of Western-oriented video programs pushing modern and sophisticated lifestyles upon *kampung* (village) peoples who do not have the means of acquiring the paraphernalia of those lifestyles (Lent, 1985).

There is also evidence of the use of video to circumvent government restrictions on television viewing, both in terms of the amount of programming made available and the political and moral content of programs. I have already cited the examples of Malaysia, Indonesia, and Singapore. Georgette Wang, for example, showed in a recent study in Taiwan just how important is the sidestep function of video (Alvarado, 1987). By 1984 14.4% of households had VCRs, used extensively to watch programming banned on television, most notably from Japan, the United States, and Hong Kong. Similarly, the Saudi Arabian government was unable to stop the circulation within Saudi Arabia of the program *Death of a Princess*, pirated copies of which were available within 24 hours of the program's showing in Britain. In her study of video in Turkey, Christine Ogan comments: "Most of the content consumed is from pirated sources. . . The piracy situation has caused the legal film market to erode." She points out that the amount of programming available from the state-owned broadcasting system is extremely limited, no more than a few hours a week: "Such little programming schedule means that there has been little program choice, causing

the video cassette industry to quickly fill the media gap." She estimates that there are 2.5 million VCRs in Turkey, with an estimated 3,000 to 5,000 video distribution outlets, offering 4,000 different foreign titles (Ogan, 1986). There is additional evidence from Latin America of video being used as a means of alternative communication in such places as Brazil, Chile, Peru, and Venezuela, though one would not wish to overstate this, however, since the overwhelming use of VCRs remains for the viewing of movies and not political tracts (Alvarado, 1987).

Consider the example of India, where Binod Agrawal writes:

Video evokes multiple reactions in the broad cross-section of Indian society today. Among the urban rich, it is one of the focal points of drawing-room conversation, whereas among the youth of the same class, it evokes a sense of competition. It is a common scene to find young men and women hovering around video centers and libraries in the afternoons in search of pre-recorded video tapes of some classical cinema or a copy of the latest unreleased film. Quite often the talk about video turns into a serious discussion on the undesirable effects it has on the studies of students in all age groups and on the morality of the nation. Video has become a new craze, a fashion, and a new means of leisure time activity. Its easy operation, continuous supply of pre-recorded videocassettes, and above all, the uninterrupted import of videocassette recorders has taken the Indian men and women, whether urban or rural, by storm. It has become a phenomenon without any parallel. (Alvarado, 1987)

Agrawal's whole account pinpoints both the immediate and considerable implications for the film industry in India of this behavior, as well as the continuing elitist basis to the actual possession of video.

However, it remains extremely difficult to speak with any certainty of the patterns of distribution of programming on videocassettes. In the study which the Broadcasting Research Unit (BRU) in London completed for Unesco on the global distribution of video hardware and software, which brings together a formidable mass of new material, one is nevertheless left grasping for more systematic statistical data. Unfortunately, that will probably never be forthcoming because of the intractable, even dangerous, problems of gathering it. Nevertheless the sense that one has of the patterns of video software are that it is not dissimilar to that of TV: To wit, in some areas there is a heavy dependence on U.S. product, in other areas much less so, with considerable use of domestic product and non-U.S. sources. In Latin and South America, for example, the rule which seems to apply is that the hardware comes largely from Japan and the software largely from the U.S.

If, however, one looks to other areas, the pattern is far more complicated. Hong Kong, for example, has emerged as a significant production and distribution center for programming on video. Television Broadcasts International (TVBI) markets about 1000 hours of its 2,000-3,000 hours of

productions annually to 25 countries with Chinese populations. The programming tends to be serialized drama, modern action, kung fu, variety shows, and comedies, all produced in different languages; Mandarin, English, Thai, and Vietnamese. Asia TV, based in Hong Kong, produces about 520 hours of drama on video. In addition, there are a host of film production companies in the colony, as well as an active distribution system. The copying house Esquire, for example, holds the rights to distribute approximately 2,000 Indian films worldwide, and serves the needs of the local Indian population as well. In Taiwan, as another example, there are about 7,500 video retail shops, with an average stock of 6000 tapes. These tapes can be categorized into five language groups: English (U.S.), Japanese, Mandarin, Cantonese (Hong Kong), and Fukienese (a local dialect). Far and away the most important of these are tapes from Japan, particularly Japanese detective series, love stories, and modern family drama, followed in popularity by Chinese martial arts movies and American horror movies (Alvarado, 1987).

The major industrial societies' use of video seems to involve a dependence on U.S. product. In Australia, 61% of video programming comes from the U.S., 16% from the U.K., 11.1% from Italy, and 3.7% from Australia. In Great Britain the rental market for videos in the English language market is dominated to a considerable extent by U.S. products. There is, however, another interesting aspect of the British video market, which is the importance of ethnic language videos. The Asian community is a phenomenally heavy user of video. A study quoted by Alvarado, for example, discovered in one area of London that one retail outlet for Asian films had a list of 30,000 titles and a membership of 5,000 people. Another study, found that the penetration of video in Gujarati homes is 74%, with an overwhelming tendency to use it to watch films from the subcontinent. There are apparently examples of some Asian women watching a hundred films *a week* (*Cable and Satellite Europe*, 1987). In Italy, 39.7% of films on video are from Italy, 44.7% from the U.S. In Spain the pattern is similar: 30% U.S., 25% Spain, 16% Italy, 10% Great Britain, and 19% from other countries.

Finally, in this examination of existing patterns of distribution of television and video programming, it is instructive to look at the program content of even those television services which, I suspect, are assumed by almost everyone to be dominated by American material. I admit here that I am only referring to Europe, but I do find it intriguing that the real picture of the program content is far more European than has perhaps been allowed. Table 1 describes the percentage of program material delivered by satellite-based services to cable systems which is produced in Europe and not in the United States.

What is the point I am making about the existing patterns of distribution of television, and to a lesser extent videocassettes by relating this mass of detail, which is, I admit, highly variable? My argument is a simple one: that

Table 1. Programming on Satellite Services (13-week sample)

	EEC Content %		Avg. Daily Output (hrs.)
	1986	1987	
THE ARTS CHANNEL	84	77	2.5
BRAVO	8	40	24
THE CHILDREN'S CHANNEL	62	63	10
HOME VIDEO CHANNEL	13	12	8
LIFESTYLE	55	37	4
PREMIERE	13	13	12
SCREEN SPORT	54	27	7
SKY CHANNEL	51	54	17
STAR CHANNEL	—	6.5	9
SUPER CHANNEL	—	88	24

Source: Cable TV Authority: Annual Report/Accounts 1986/7.

the structure of distribution is far more complex than has often been allowed for. One can see many nodal points for the future around which production has grown—principally in the major industrial societies other than the United States, but also to an increasing extent in other countries—which will simply not go away or readily wither under heat emanating from North America. Indeed, these centers will become ever more aggressive and successful in their efforts to compete with the United States on the international market. I have in mind here the increasing competitiveness on the international market of such major organizations as the British Broadcasting Corporation (BBC), Zweites Deutsche Fernsehen (ZDF), and Arbeitsgemeinschaft der offentlich-rechtslichten Rundfunkanstalten der Bundesrepublik (ARD), but also the rapidly growing power and wealth of production houses in such diverse places as Egypt, Brazil, Hong Kong, and Japan. In contemplating the future, it is useful to remember that television as a global institution is relatively new, a creation of the 1960s and 1970s, and that to this extent the potential competition to the United States is really only just up and running. In my view, what the existing and emerging patterns of consumption represent are not an American hegemony at all, if taken to mean a total domination, but a complex and evolving structure, which has hidden within the central fact of television: on the whole, national audiences and audiences defined by some singular demography, prefer *their own programming*.

CHALICES: THE NEW TECHNOLOGY AND GLOBAL TELEVISION

Of course, whatever qualifications I am placing on contemporary patterns, there may be enough evidence for someone to argue that if new delivery systems are in place, they can overwhelm all potential opposition. Table 2

Table 2. Number of Households in Europe Able to Receive a Given Channel

CHANNEL	Austria	Belgium	Denmark	Finland	France	Germany	Ireland	Luxem- bourg	Nether- lands	Norway	Sweden	Switzer- land	UK	TOTAL
3SAT	310,000					2,075,000								
FILMINET		35,000		5,000					60,000	3,000	3,000	334,000		2,719,000
RAI		2,500,000						50,000						106,000
RTL-PLUS		40,000				2,046,000		100,000				1,025,000		3,575,000
SAT 1		360,000				2,075,000								2,456,000
SKY		293,708	103,410	281,963	37,931	2,023,212	238,971	76,227	3,156,658	279,695	256,222	1,200,239	200,549	2,435,000
SUPER		302,000	82,000	258,000	33,000	2,072,000	255,000	81,000	2,935,000	223,000	244,000	777,000	137,000	9,112,277
CHANNEL														
TELECLUB						700								7,940,000
TV5	16,293	1,049,589	43,773	77,873	67,012	1,038,000		71,373	1,655,177	62,698	156,739	45,000		45,700
WORLDNET	150	310,000	9,474	41,896	250	635,000	37,000	67,500	104,500	71,000	152,712	406,712		4,645,239
NRK												837	31,214	1,461,533
INTELSAT														750,000
27.5 WEST														
CHILDREN'S														
CHANNEL														
CNN							225,000				1,500		100,000	327,000
ARTS					2,281						141,956			144,237
PREMIERE							40,000		350,000		1,000		12,000	403,000
LIFESTYLE													40,000	40,000
SCREEN							238,000				1,250		86,804	326,094
SPORT				1,000										
BR 3							238,000				1,500		76,324	316,824
EINS PLUS						1,569,000								1,569,000
EUREKA						2,075,000								2,075,000
MUSICBOX						1,533,000								1,533,000
WRD 3						2,075,000								2,075,000
CANAL J					10,000	1,185,000								1,185,000
LA CINQ					10,000									10,000
M6					10,000									10,000

Source: Cable and Satellite Europe, June, 1987.

allows us to examine the evidence, in particular from Europe, where there is certainly no arguing with the sheer *physical* availability of new channels.

All very impressive, but the available objective evidence of the considerable and continuing losses incurred by cable and satellite services throughout Europe point to the difficulties of developing new television markets. There remains, however, a basic belief within the advertising industry that satellite television funded by advertisements will succeed. The optimism is borne on occasional flashes of success, even if at the moment these are as rare as the flowering of cacti in the desert.

The problem with the evidence employed is that it tends to be drawn only from cabled homes, which in Europe remain a tiny minority, and therefore provide a very uncertain basis on which to begin to make a judgment. For example, in Germany, the average daily television viewing in April 1987 was 134 minutes. This was divided: ARD 57 minutes; ZDF 54 minutes; the regional network 14 minutes; all other channels including SAT 1 and RTL plus, 9 minutes. There is no question that if the programming packages put together to be delivered by new media systems—cable, communication satellites, DBS—could restructure the television audience in key markets such as Europe, then there is vast wealth to be tapped in terms of the potential revenue.

Advertising on television within Europe is defined by three main zones:

1. Those countries in Northern Europe where there has traditionally been no national TV advertising—Norway, Sweden, Denmark
2. Those countries where there has been some advertising, but where it has been heavily circumscribed, such as Germany, France, Belgium, Holland, Switzerland, Austria, and Finland
3. Those countries where advertising is generally accepted, such as Italy, Portugal, Spain, Greece, Ireland, and the United Kingdom.

It was recently calculated that the total current advertising within Europe is about \$6 billion, and that if television advertising were “set free” in countries within the first two zones, the figure could be closer to \$8.4 billion (*Broadcast*, 1987). According to research commissioned by Sky Channel from Saatchi & Saatchi, expenditure on television advertising in Europe was to be 58% by 1990, from \$4.7 billion in 1985 (0.17% of GDP) to \$7.4 billion in 1990 (0.24% of GDP). Patrick Cox of Sky argued that the figure could be 0.3% of GDP, or \$12 billion (Sturgess, 1985). Cox’s argument assumes that the total amount of viewing will increase, particularly on the new advertising supported channels: “The problem we’ve had as a channel is that we are selling a very sophisticated product—pan-European advertising—when the national advertising markets don’t really exist.” Presumably the same kind of argument could be made about other parts of the world: that the wealth

is there and all that is needed is the correct programming strategy, to be carried by the new distribution technologies, and thus is provided the key to unlock the door to the treasury.

As indicated at the beginning of this paper, anticipation of the future, with fear and loathing rubbing up against hoping and dreaming, has rested on the assumption that the new technologies will be successful, and that U.S. product will be at the heart of the package they deliver. Certainly there are some interesting clues that such programming, used on new outlets, can occasionally gather the treasure. In one particular instance, new television services, using considerable amounts of U.S. material, have had spectacular success in restructuring the audience and generating advertising revenue. The example to which I am referring is that of Italy, where the rise of the television stations following the 1976 Constitutional Court's decision to allow unregulated local private broadcasting, led to a dramatic increase in advertising revenue, from 33 billion lire in 1970 to 198 billion lire in 1983, a growth of over 500%. Almost three quarters of this growth occurred between 1976 and 1983. Total advertising expenditure in Italy increased from 266 billion in 1970 to 2,666 billion lire in 1983; and as a percentage of GDP, from 0.42 to 0.50. That latter figure masks a decline from 1970 to 1976 from 0.42% of GDP to 0.30% in 1976. The new private television stations therefore had the effect of restoring the percentage of GDP to what it had been and then adding some, largely by drawing off revenue from other media and generating new sources of revenue (Sturges, 1985; de Sola Pool, 1976).

I am led to conclude, however, that this example will not provide the model, and that *at best* television services, new or old, dominated by imported, specifically American television, are in for a very rough ride, precisely because they will find it increasingly difficult, politically and culturally, to unlock the advertising wealth which undoubtedly exists.

An interesting and salutary tale which is relevant here occurred on August 3, 1987, when the board of Superchannel, the 24-hour pan-European satellite service run by the British commercial television companies, met in crisis. *The Sunday Times* headline reported simply, if a little obviously, "ITV fights to stay in orbit." Launched in January 1987, Superchannel offered to European cable systems "the best of British programming" provided from the massive archives of the BBC and the ITV companies. In March, its joint managing director Richard Hooper was still cooing optimistically about the future, the fruits that the new channel would offer, and the kind of audience that would be picking them. He told a meeting in Copenhagen, "We at Superchannel strongly believe that there is a market for pan-European television that sits alongside and enriches national television, increases choice." The character of that market, he made clear in a later article: "Superchannel is an entertainment channel but is seeking out the 25 year-old to 45 year-old

upwardly mobile family audience." At the beginning of the year, nevertheless, everyone—the channel, its rivals, ad agencies—agreed that only time would tell if a diet of essentially U.K. programming would draw the crowds and particularly those all important, highly valued Euro-yuppies. The mood, however, was optimistic—how could it not be—here was a station offering the best product from what the British had been touting for years as the best television system in the world.

However, the experience of the Murdoch rival, Sky Channel, had made it quite clear that starting a satellite channel to Europe was, at least in the first years, a good way of losing money. Sky in fact lost approximately £5.69 million in the year prior to the start of Superchannel, and the Swedish-owned channel *Filmnet* lost £ 8 million in the first nine months of 1986.

The picture presented at the crisis meeting of Superchannel in August, however, was of a channel which, while it could be received in more than 8 million homes in 15 countries with an average audience of 1 million, was simply not generating enough advertising revenue to survive. The roots of the crisis were varied; for instance, there had been enormous and damaging difficulties in making agreements with all the relevant parties for the use of British material. Critically, though, the advertising simply was not there in the necessary quantities. The projected operating costs for the 1988 years was £21 million, up £2 million from the previous year. The revenue from advertising was projected at £7 million, with the shareholders expected to make up the shortfall. It was this discrepancy between revenue and expenditure, amplified by increasing doubts as to whether there would ever sufficient market for satellite delivered services, which led to the crisis meeting of Superchannel's board. The board's response was to cut costs, shed staff, and completely reappraise their programming strategy with the aim of introducing more mass appeal programs into peak time slots. There were those in the industry who remained less than convinced that the channel would see another summer, and their doubts were shown to be correct when in 1988 the major investors in Superchannel sold, at enormous loss, their controlling interest in an Italian company.

Much of the analysis of Superchannel's problems point to the institutional trip-wires being placed in front of it—by European governments, European cable operators, and the trade unions—as being the real basis for its fall. Certainly these were real problems which should not be underestimated, but it is interesting, however, to speculate as to what would have happened had the channel been given a straight run at the European television audience. In my view, it would almost certainly have been in exactly the same failure.

The basis of my conclusion is relatively straightforward: the Channel and its backers were using an expensive means of throwing a uniform program schedule mainly at audiences whose singular characteristic was that they

were different from each other in their needs and expectations, moods and manners, histories and cultures.

The assumptions behind Superchannel are by now fairly commonplace; in the satellite and cable fields, new markets are there to be developed on the wave of the future: deregulated, nonpublic service television. What is becoming very clear is that the missionaries of the new age have, in fact, little grasp of the social dynamics of the European television audience, even though such understanding is quite clearly necessary to the design of the television architecture of the future European audience. Indeed, as I have suggested, it is in the very use of the singular noun "audience" that much of the problems lie, since the structural weakness of pan-European television is the logical assumption it must make about there being a pan-European *audience*, rather than *audiences*. Superchannel's error was to put together a naive equation: British television has masses of high quality television; this appeals to yuppies; there are lots of yuppies throughout Europe; they have lots of disposable income; advertisers like that; therefore deliver those programs and presto! you have yourself an income. This grossly overemphasized social commonalities, underestimated the forces of national cultures as powerful definers of national cultural taste (even among yuppies), and ignored the fact that not all those yuppies reside at the end of a cable system. It is an error, not unique to Superchannel, rooted in the hubris so redolent of the so-called third age of broadcasting, the paucity of market research, and the beguilement with the Gucci technologies of satellite delivery. The result was the absence of any proper attempt to grasp the more prosaic, but just as important, sociology of reception.

There is no decent model, both comprehensive and comparative, empirically and conceptually adequate for the television markets of the future. However, clues do exist, scattered around, providing insight into the likelihood, or not, of imported television being successful, or even acceptable, and into that mysterious question of what audiences of the future will require for their enlightenment and pleasure. To explain why I am saying this, in effect placing a question mark against the assumptions underlying the conventional wisdom, I need to examine the nitty gritty of *how* television audiences already make their decisions, and some of the reasons *why* they make those decisions.

CHOICE:

PUBLIC ATTITUDES TOWARD GLOBAL TELEVISION

The whole debate about international television, whether taking place inside the boardrooms of multinational corporations, at market research companies, or in the conspiratorial mind of the academic left tends to be loaded

with assumptions about cultural influences, about meanings and the shaping of consciousness, and even about the sheer amounts of television flows. Yet each equally holds those views in the abstract, outside of any grasp of their place within the individual biographies of the myriad members of more than a 100 television societies. I must agree with the following observation by the late Ithiel de Sola Pool (1976):

There is, in fact, remarkably little research of any kind on international communication. There is a great deal of essay writing about it. But by research I mean studies in which data is collected to establish or refute some general proposition. . . . The two topics regarding international communication that have been most extensively studied, and very badly, I must say, are the balance in the flow of communication among countries, and the cultural biases in what flows. These are topics on which there have been a few empirical studies, though by far the great bulk of that literature consists of polemical essays unenlightened by facts.

Well, what do the facts tell us? Let's begin with that most famous son of the television age, J.R. Ewing and his "wall-to-wall *Dallas*." Since its launch in 1978 and its export to many foreign countries, *Dallas* has become the exemplar of the global influence of American television, the apparent embodiment of the theory of cultural imperialism, a metaphor for an entire argument, and the very essence of discussions about international program trade. Slick, polished, dramatic, sexy, wealthy, cheap to buy in and so, so popular. At a Unesco meeting in Mexico in July, 1982, the then French Minister of Culture, Jack Lang, identified *Dallas* as a threat to the national culture of France. Lang called for a crusade "against financial and intellectual imperialism that no longer grabs territory, or rarely, but grabs consciousness, ways of thinking, ways of living (Cantor & Cantor, forthcoming).

Lang's words are familiar. What has been almost totally ignored, however, in the debate around *Dallas* is the relationship between the program and the various audiences who, for whatever reasons or circumstances, actually sit down and watch it. Any exploration at that level, no matter how cursory, provides some important qualifications to the argument of its dominant influence. For example, one discovers that in most countries, *Dallas* is not as popular as home-produced soaps. It is completely ignored in countries as diverse as Brazil and Japan, which nevertheless have well established and highly popular domestic dramas as part of their main television program output. In Britain, whence came the "wall-to-wall" phrase with the solitary exception of the "who shot JR" episode, the program never came anywhere near competing with such long-standing, popular dramas as *Corporation St.* and *Crossroads*. In Japan, *Dallas* was introduced in October of 1981, went to a 10% share, and then to a 3% share by December.

This is compared, for example, with the popularity of *Oshin*, a locally produced, six-day-a-week, 15-minute serial drama of a woman triumphing over hardship. *Oshin* had an audience share of 57%, once recording the highest share ever in the history of Japanese television, 63% (Cantor and Cantor, forthcoming). In explaining the difference, two academic observers make an extremely interesting observation:

In contrast to *Oshin*, the suspense in *Dallas* arises from greed, self-interest, lying and manipulation—behavior that might be considered objectionable and shameful in a culture that prizes loyalty, self-sacrifice and honoring one's obligation. Thus, it is possible that shows which do not conform to particular basic values in a culture might be rejected by that culture. (Cantor & Cantor, forthcoming)

In New Zealand, other kinds of imported programming from other countries are also more popular than *Dallas* and its ilk (Lealand, 1983).

It is simply untrue that imported television programs, from the United States or other metropolitan countries, always have a dominant presence within the indigenous television culture. Certainly they do not always attract larger audiences than homemade programs, nor do they always threaten national production. In Brazil, for example, the sixth biggest television market in the world, the level of imported television material fell by 32% between 1973 and 1982, largely due to the activities of TV Globo, which captures between 60% and 80% of the television audience. Between 5:30 p.m. and 11 p.m., 84% of the channel's programs are in-house productions. In August 1983, the top 10 programs were all Globo productions, including three telenovelas. As Richard Paterson points out, in Brazil one sees "a television devoted to national culture. TV Globo has fully utilized the possibilities created by these circumstances to develop a different sort of television. The development of an indigenous television puts into question the thesis about the inevitability of traditional drama and folk music retreating before the likes of *Peyton Place* and *Bonanza* (Paterson, 1982). In fact, TV Globo now produces more programs than any other channel in the world, and reaches 99.9% of television households in Brazil. In 1986, it had the most popular telenovela ever, *Roques Santeriro* (Roques the Saint), which at times had a 90% of the audience. Globo exports to more than 100 countries, including China, the USSR, and Germany. Its production *Isaura, the Slave Girl*, was something of an international success. Other networks in Brazil, such as TV Manchete and TV Bandeirantes, are beginning to compete with Globo with their own productions. *Dallas*, by the way, in 1982 occupied 69th position in the Brazilian ratings, and 109th in Mexico.

Elsewhere in Latin America there is much U.S. product to be found, but one also finds the ubiquitous telenovelas which are, according to one recent

account "a fixed ad schedule-topping 'feature'" (Petch, 1987). In Central America, one new angle on U.S. influence is the growth of the Hispanic SIN-TV network. Its programs *Noticiero SIN* and *Mundo Latino* have been well received in Guatemala, Honduras, El Salvador, and Costa Rica. In Guatemala, however, schedules are dominated by such soaps as *De Pura Sangre* and *Viviv un Poco* from Mexico, and *Topacio* from Argentina. In Honduras, programming is dominated by a combination of U.S. imports and Latin American telenovelas. In Mexico, the popular channel, Channel 2, consists of family entertainment, sports, news, and hours each day of local telenovela. In Colombia, with three television networks, a "significant proportion of TV content is produced locally" (Petch, 1987). An analysis of programs during one week on the two commercial channels found 54% of programming produced domestically. Of the 46% of imported television, 14.6% were soap operas from Brazil, Mexico, and Venezuela; 18.7% were children's programs from Latin America and the U.S. Prime time was dominated by national soap operas such as *Tuyo es mi Corazon* and *Amandote*. In Venezuela, 55% of the programming is produced domestically, and while U.S. and Brazilian soaps are popular, "they do not compete for the prime time spots filled by local productions such as *Cristal* and *Los Donatti*" (Petch, 1987). Both of these programs have been exported to countries throughout the region and the United States. In 1985, *Cristal* had a higher audience share than *Dynasty* in Miami. In Ecuador, 65% of programming is imported from Latin America and the United States. In Paraguay, imports from the United States amount to 70% of programs, whereas in Peru the government has demanded 60% of domestic production. Presently, 65% of programs are imported, of which 46% are from the United States. The 35% domestically-produced television is remarkable, particularly since before 1980 there was virtually none at all.

Another illustration of how indigenous populations do not respond to imported material in stereotypical ways can be seen in South Africa. There TV1 carries such imports as *Dallas* and *The A-Team*, with indigenous programming on TV2 and TV3. In December 1983, Bophuthatswana Television, broadcasting from the Bop capital of Mmabatho, began to broadcast in English, but with increasing amounts of material of a local nature in Setswana. More and more of the black population of South Africa turned to Bop TV. Indeed, such had been its success that President Mpepha of the tiny republic of Venda has announced that he wants his own television service, Radio Television Thohoyandau. In Kenya, the most popular programs are locally produced programs such as *Vitimbi* in Kiswahili and social dramas such as *Fedhena*.

In Singapore, the government's Singapore Broadcasting Corporation runs three channels, broadcasting in English, Mandarin, Tamil, and Malay. Sixty percent of the programs are English language, the bulk of which are

imported, but Chinese programs, particularly from Hong Kong, are consistently the most popular. The Malaysian station TV3 had proven to be particularly successful by transmitting in Cantonese for the Chinese population in Malaysia and Singapore. In Thailand the most popular programs are Thai movies, though as one commentator recently observed, "Chinese plays are the new rage of Thai television with series from Hong Kong's TVB and ATV leading the rating charts" (Marshall, 1987). Japanese television has also proven to be very successful in Thailand, while local Thai producers concentrate more and more on musical variety game shows and comedies, which are very popular with country housewives. In Ireland, which imports 65% of its total output, and where the BBC and ITV are already available to most of the population, the most popular programs for many years have been *The Late, Late Show* on Saturdays, hosted by Gay Byrne, followed by the home produced drama series *The Riordans*, *Brackens*, and *Glenroe*. In countries such as New Zealand and Sweden, where enormous problems facing the local broadcasting services necessitate importation of foreign television, home grown programs nevertheless compete in terms of popularity. In New Zealand, in fact, there is evidence that the bulk of the population actively dislikes the American television they see on their screens (Lealand, 1983). In Zimbabwe, in 1982, locally produced programs such as *The Mukadda Family* had much higher ratings than the imported *Dallas*, *Dynasty* and *Falcon Crest*. One author writing about television in Bangladesh observed:

Imported programmes are popular, but do not dominate BTV. In the 1980s some would say that the *Incredible Hulk* does sit uneasily between *Shilpo-O-Shahitya* [a series on art and literature] and *Jalsa* [a program on classical music]. *Dallas*, *Charlie's Angles* and *CHIPS* are cheaper for BTV to transmit than any local dramas—but local productions challenges them in a way few outsiders would believe possible. (Marshall, 1987)

And so one could go on. This is not to say that imported programs are not an important part of the total content of many countries broadcasting, nor indeed that they are not, in some cases, very popular. It is merely to observe that even a limited glance at the available evidence indicated that the role of television in any society is far more complex than is often allowed for. As far as we can tell, audiences do discriminate, and do tend to prefer home-produced television rather than slavishly pursuing imported programs.

There is another very interesting clue to the truth of this argument from an example which at first might appear to support the opposite case, that national cultures are cracking under the pressure from new transnational programming and program forms. The classic example of a major European station setting out to produce a European *Dallas* was ZDF's production of *Schwarzewaldklinik* (Black Forest Clinic). First shown in Germany in October 1985, it was an immediate and massive success, with an opening

audience share of 60%. By January 1986, it was reaching 28 million viewers per episode, about 65% of the audience. An obvious and plausible analysis was that it had all the ingredients which seemed to characterize successful American television, the kind of television which maybe the new satellite and cable services could successfully exploit: drama, family, romance, power, sex, intrigue. Another way of looking at its success, however, is to see how it tapped into certain key themes lying half-dormant within the modern German mind. The German sociologist, Michael Hoffman, in an excellent analysis of this program, links its success not to its apparent transnational ingredients, but to the creative genre of:

Heimatfilm, films about localities and landscapes, which evoke in a large segment of the population a strong feeling of belonging, even of identification. The need for "Heimat," sense of peace and home, for a personal, concrete environment is deeply embedded in the phenomenon which Elisas Canetti called the German symbol for the mass of people: the forest as the archtypical shelter. Expressed in terms of human relations it means the sense of community (a) tradition . . . reflected in the classic German (Sociological distinction) between *Gesellschaft* and *Geminschaft* i.e. between society and community. (Hoffman, 1987)

Hoffman points to the way in which the central, archetypal images of a culture are carried within an oral tradition and then sealed within the physical artifacts of the print and visual media. The economics of production ensure that the images so captured have the most resonance with popular consciousness. There is a very plausible thesis, then, that the roots of the success of programming such as *Schwarzwaldklinik* lie deep within antiquity. When the gloves are really off in the emerging collision between national and transnational television forces that basic observation will be of far more than academic interest.

What I am suggesting is that one must approach the question of future television markets from a slightly different angle than that of econometrics and market research. One can only really understand the role and use of television if one understands not how it is imposed on societies, since that is simply not how the process works, but rather how it taps into and feeds off the rhythms, moods, and moralities that are present. The case which Hoffman makes, about the importance of deeply embedded cultural themes, could easily be echoed in Britain. There the most powerful television, certainly drama, is the highly successful and long-running *Coronation St.*, and more recently *Eastenders*. There is also a long tradition of single drama. No American program, not even *Dallas*, has come close to competing in popularity and critical success with these programs. And in this way, I am suggesting, British is far from unique.

The real clue as to what European audiences prefer is rather simple to portray. Table 3 is a list of the top 20 programs in France, Germany, and Britain in April 1987 (Eurodience, 1987). The significant feature of these listings of popular programs is just how little imported television, including U.S. programming, there is. There are also other more impressionistic but equally interesting clues scattered across European television. In Finland, a number of new channels are available through cable, along with the Finnish advertiser-supported MTV, but two-thirds of all viewing time is of programs from the public service Yleisradio [YLE]. In the year 1981-82, 60.5% of programming was produced in Finland, with individual figures of 63.3% for YLE and 48.4% for MTV. Of the 39.5% of programming from abroad 26.1% came from the United States, 19.6% from Great Britain, and 11.3% from Sweden. The rest of the foreign television came from 26 other countries—from Eurovision, Intervision, Nordvision, and from coproductions. Another interesting fact of Finnish television life is that TV3 (OKA), jointly set up by YLE, MTV, and the electronics company Nokia, is watched by more people in the Helsinki area than all satellite and cable channels put together. In Portugal, RTP produces 60% of it as own programming. Last year, the top program was the RTP soap opera *Palavras Cruzadas*, and considerable success was also had with two Brazilian soaps from TV Globo: *Vereada Tropical* and *Corpo a Corpo*.

Table 3. Top 20 Programs in France, the U.K. and Germany.

			Day of Month	PM (time shown)	% Share of Viewing
Top 20 France					
1	LA FEMME DE MON POTE	Film	TF1	5 20:31	38.8
	Comedy 1st broadcast in 1986.				
2	LE GENDARME SE MARIE	Film	TF1	12 20:38	36.7
	Comedy previous broadcast in 1981.				
3	LOTO SPORTIF		TF1	13 20:32	36.2
4	SUBWAY	Film	TF1	13 20:42	33.2
	Comedy drama 1st broadcast in 1986.				
5	IL N'YEN A QU'UNE	Show	TF1	15 20:42	31.7
6	LOTO		TF1	15 20:34	31.6
7	MAGNUM FORCE*	Film	A2	21 20:35	31.6
	Thriller.				
8	100 000 DOLLARS AU SOLEIL*	Film	TF1	26 20:36	31.3
	Adventure comedy.				
9	LE TOMBEUR	Theatre	A2	29 20:33	30.7
	Comedy.				
10	LOTO SPORTIF		TF1	6 20:31	30.2
11	LE CHEMIN DES ECOLIERS	Film	TF1	6 20:40	29.7
	Comedy Drama previous broadcast in 1980.				

(continued)

Table 3. Continued

			Channel	Day of Month	PM (time shown)	% Share of Viewing
12	GRAND PUBLIC: SIM	Show	TF1	24	20:33	28.7
	A live variety show based on entertainment star.					
13	TIRAGE DU LOTO		TF1	1	20:33	28
14	FOOTBALL: FRANCE-ISLANDE		TF1	29	19:55	27.8
15	CHAMPS-ELYSEES	Show	A2	25	20:32	26.2
	Every Saturday night, well-established show.					
16	LA GRANDE EVASION*	Film	TF1	19	20:39	26
	Adventure					
17	GRAND PUBLIC: S. STALLONE*	Show	TF1	3	20:37	25
18	L'HEURE SIMENON	TV Film	TF1	1	20:40	24.8
	A new series of adaptations of Georges Simenon:					
19	UN ELEPH CA TROMPE ENORM	Film	A2	14	20:33	24.4
	Comedy					
20	NOUS IRONS TOUS	Film	A2	28	20:32	24.3
	AU PARADIS					
	Comedy					
Top 20 UK						
1	EASTENDERS [twice weekly]	UK Serial	BBC1		19:30	36.7/47.6
	Twice weekly with rebroadcast.					
2	CORNATION STREET	UK Serial	ITV		19:30	24.8/32.2
	[twice weekly]					
	Produced by Granada, on air since 1960, twice weekly.					
3	LIVE FROM THE PALLADIUM	Show	ITV	5	19:45	29.7
	One from a series of shows broadcasting during six weeks.					
4	DON'T WAIT UP	Series	BBC1	6	20:30	29.4
	Comedy series.					
5	EVERY DECREASING CIRCLES	Show	BBC1	13	20:30	28.5
	Comedy show.					
6	LIVE FROM THE PALLADIUM	Show	ITV	12	19:45	27.4
7	BERGERAC	UK Serial	BBC1	4	20:35	26.8
	Detective serial.					
8	JUST GOOD FRIENDS	Serial	BBC1	12	21:25	26.3
	Comedy serial.					
9	BOB SAYS OPPORTUNITY	Show	BBC1	4	19:50	26
	KNOCKS					
10	THIS IS YOUR LIFE	Show	ITV	8	21:00	25.9
	Based on the life of a entertainment star.					
11	WORLD CHAMPION	Boxing	BBC1	18	21:50	25.6
12	ONLY FOOLS AND HORSES	Series	BBC1	12	21:25	25.4
	Comedy show broadcast on Christmas.					
13	BERGERAC		BBC1	11	20:35	25.3
14	CLIVE JAMES ON TV	Show	ITV	5	22:00	25.2
	Comedy show.					
15	THE MIRROR CRACK'D*	Film	BBC1	18	19:45	25.1
	Thriller.					
16	BOY SAYS OPPORTUNITY	Show	BBC1	11	19:40	25
	KNOCKS					
17	NEWS, SPORT AND WEATHER		BBC1	18	21:35	24.9

Table 3. Continued

		Channel	Day of Month	PM (time shown)	% Share of Viewing
18 THIS IS YOUR LIFE	Show	ITV	1	19:00	24.2
19 ONE BY ONE	UK Series	BBC1	4	19:05	24
20 CLIVE JAMES ON TV	Show	ITV	19	21:00	23.9
Top 20 W.G.					
1 WETTEN, DASS "What are the odds".	Game+Show	ZDF	4	20:16	40.4
2 SPION ZWISCHEN ZWEIFRONTEN A spy between two fronts.	Film	ARD	12	20:17	37.7
3 VERSCHOLLEN IN PAZIFIK	TVD	ARD	5	20:35	36.8
4 LANDTAGSWAHL IN HESSEN		ARD	5	21:21	36.4
5 BEN HUR*	Film	ZDF	26	20:16	34.8
6 DAS ERBE DER GULDENBURGS	WG Serial	ZDF	4	19:32	31.4
7 EUROPAPOKAL European football cup.		ARD	8	20:11	31.1
8 EUROPAPOKAL Bayern/Madrid.		ZDF	22	21:59	30
9 DIE VERFLIXTE 7 "The silly 7"	Game+Show	ARD	11	20:16	28.9
10 DAS ERBE DER GULDENBURGS		ZDF	11	19:30	28.6
11 TATORT WG series based on crime thrillers adaptations.	Series	ARD	20	20:17	28.2
12 EUROPAPOKAL Munche Gladbach/Dundee		ZDF	22	20:04	28
13 DAS ERBE DER GULDENBURGS		ZDF	25	19:21	27.4
14 WAS BIN ICH "What am I?"	Game	ARD	14	20:17	27
15 EIN FALL FUR ZWEI "A case for two".	Series	ZDF	10	20:15	26.8
16 EUROPAPOKAL Dundee/M'Bach.		ARD	8	22:04	26.5
17 DERRICK*	Series	ZDF	24	20:15	26
18 DER GROSSE PREIS "The big prize".	Game	ZDF	9	19:30	25.8
19 DER DENVER CIAN DYNASTIE*	US Serial	ZDF	15	21:00	25.7
20 DIE WILSHEIMER	WG Serial	ARD	13	20:17	24.3

The point of this Cook's tour, then, is actually quite simple: To say that a rather more discrete, subtle, and empirical approach is necessary to the sociocultural experience of television, before we can begin to understand the actual experience of the flow of international television and therefore the notion of the likely dominance of U.S. television. And when we do experience how choices have been made about programming on terrestrial systems, the preference is clear.

Table 4. Average Hours TV Watched Per Week

	Netherlands	Switzerland	FRG	Belgium
Nov 1984 (4-64 yrs)	16.4	11.6	—	—
March 1986 (13-34 yrs)	20.9	13.4	17.8	24.2

Source: ESMAR 1987.

Table 5. Viewing Behavior

Total Available Channels	Loyalty to Channels (4 weeks)			
	Belgium 23	Germany 22	Netherlands 23	Switzerland 19
% WATCHING				
1 channel only	0.4	0.8	—	1.0
2 channels	1.6	1.2	10.1	2.2
3 channels	3.3	2.9	13.7	4.1
4 channels	4.8	4.2	18.7	8.0
5 channels	16.8	12.6	20.9	10.4
6 channels	25.4	17.0	15.3	17.3
7 channels	23.0	21.3	8.4	21.3
8 channels	8.7	16.9	6.8	13.3
9 channels	7.3	5.8	3.3	9.9
10 channels	6.2	8.8	2.4	5.2
11 channels	0.7	6.4	0.4	4.6
12+ channels	1.8	3.1	—	2.6
Major channel share	38.1	24.8	56.0	24.9
Average watched	6.6	7.7	5.0	6.9

Source: Dent et al., ESOMAR, 1987.

What are the choices which people make in multichannel environments? Is there evidence here which will provide a clue to the question of whether or not the future of television lies with imported television from rich societies, particularly from the United States?

In a detailed, empirical study, shown in Tables 4 and 5, Dent, Winkfield, and Lloyd looked at the use of television in a multichannel environment (Dent, Winkfield, & Lloyd, 1987). The countries studied were Netherlands, Belgium, Switzerland, and FRG, and the sample was drawn exclusively from cabled households. Theoretically, the number of channels available at the time of the study in late 1986 were: FRG 3 domestic, 15 other terrestrial, 8 satellite/cable, a total of 26; Netherlands 2 domestic, 15 other terrestrial, 5 satellite/cable, a total of 26. In an earlier study in November 1984, they

calculated the average amount of viewing in cabled homes in the four countries, and then recalculated in March of 1986. Allowing for the differences in the sample base, the authors find that of viewing in cable homes has increased. The most interesting part of their research is where they look at viewer loyalty. They comment; "Only a tiny minority are 100% loyal to one channel only, with significant numbers watching as many as 19 or more channels. . . findings which endorse the argument that audiences are fragmenting; viewers are exercising their choice and enlarging their viewing repertoire to cover many different channels in a variety of languages." However even within the fragmented structure of viewing in cabled homes, there still tends to be a preference for viewing one or two channels. For example, in the Netherlands the viewing of Nederland 1 and 2 accounts for 75% of viewing in cabled homes. In Germany, the viewing of ARD and ZDF amounts to 46% if viewing in cable homes, compared with 15.2% for SAT 1, 9.8% for Music Box, 9.7% for RTL plus, 5.6% for Sky, 2.6% for 3 Sat, and 11.1% for other channels.

Dent, Winkfield, and Lloyd's main conclusion, however, is that greater choice increases the television audience in terms of the total number of hours viewed. The German experience *seems* to suggest that the more television people watch in total, the more different channels they watch. Sky and Music Box hold strong minority audiences and are watched at different times of day, for different periods of time, and have a higher share on the second set: "In short, people in cabled homes are using the new opportunities to watch TV at times, or in places, where they did not previously watch." The authors also add: "Minority audiences are responding to the programmes designed for them, as has happened in the UK with C4. It appears that more could be done in this area, and furthermore that audiences will exercise their freedom of choice in a discriminatory way" (Dent et al., 1987).

The tantalizing thesis which emerges, and which remains hovering in front of the eyes of some media entrepreneurs, is that increasing choice leads to less loyalty, and to fragmentation defined not by demographics but "life-style" variables. These definable target groups and specific minorities then provide the basis for new markets.

In Britain there is some research on cable viewing patterns which seems to confirm the general thrust of this analysis. There were 1,190,000 homes passed by cable, and 193,173 homes subscribing to cable program services in Britain as of July, 1987 (Annual reports, 1986/87). Cable households in the United Kingdom tend to be larger (3.56 people), more likely to have a VCR (50%), and/or more than one TV (54%), and spend more time watching television (5.6 hrs. per day) than the national average. They are also overwhelmingly CDE rather than AB. In November, 1986, 28% of viewing time in cabled homes was spent watching cable programs as opposed to broadcast television, up 7 percent from the previous year. Particularly inter-

Table 6. Satellite Share of Weekly Viewing Hours as Percentage

	Scandinavia	Belgium	Germany	Netherlands	Switzerland
Domestic Channels	73	23	64	83	46
Satellite Channels					
Sky	20	1	2		
Superchannel 7	7	—	1	2	1
TV5	—	1	—	—	—
RA II	—	1	—	—	4
3 Sat	—	—	1	—	—
1 Plus	—	—	2	—	—
Musicbox	—	—	2	—	—
Teleclub	—	—	—	—	1
RTL Plus	—	—	13	—	—
Sat 1	—	—	14	—	—
Spill-in Channels i.e., other terrestrial		69	1	9	46

Source: PETAR/Dawson *Media International*, September 1987.

esting, although given the social composition not surprising, was the fact that there was considerably more viewing of cable than of Channel Four or BBC2, the "minority" channels within the Public service system (Annual report, 1986/87).

A study of cable viewing patterns by the Pan-European Television Audience Research [PETAR] (1982) company was conducted in 12 countries, involving 10,000 viewing diaries placed in selected homes. The survey focused only on households connected to cable services, on the grounds that "these represent the likely future scenario for broadcasters and narrowcasters alike." In so far as I understand what that latter statement is saying, it strikes me as begging several extremely large questions, particularly as there is no evidence whatsoever that, on a European scale, cabled homes will be the norm even by the next century.

The research pinpoints in some detail the share of total viewing held by satellite services in cabled homes. In the September 1987 edition of *Media International*, Charles Dawson of Young and Rubicam presented some of the results which appear in Table 6. It is important to remember that these figures are for viewing in cable homes, *not* television homes. What the PETAR research did not mention was the figure for the percentage of television homes on cable systems, and yet that figure is crucial in judging the worth of the conclusions being drawn.

In Belgium, the Netherlands, and Switzerland—the countries with a high penetration of cabled homes—satellite-delivered services are a minimal part of the viewing diet. It is difficult to see how the figures, even viewed with the most committed eye, can justify the statement by Dawson that "evidence

Table 7. Cabled Homes in Europe in Relation to the PETAR Sample

	Scandinavia	Belgium	Germany	Netherlands	Switzerland
Households	7.25m	3.72m	25.30m	5.50m	2.50m
Homes Connected	1.79m	3.10m	2.30m	3.10m	1.40m
Penetration	24.7%	83%	9%	56%	56%

Source: PETAR/Dawson Media International, September 1987.

is growing that, when offered an increased choice of channel, European viewers vigorously exercise that choice." They might by straws in the wind, but the straw is truly tiny and the wind extremely limp. The fact remains, however, as these figures demonstrate that even in cabled homes with an existing disposition to at least try new services, audiences are not massively exercising their choice, at least not to an extent which would make the new services viable.

One has, therefore, to be very careful with all these figures since while, on one level, they point to a certain disposition to use the new services, the homes surveyed are only a small minority of those in a position to take out a subscription for new television services. (In Britain about 10%, and an even tinier minority of all homes, one out of 160.) For this reason a study by Wim Bekkers (1987) of the Audience Research department of the Netherlands Broadcasting Foundation (NOS) is particularly interesting since it looks at patterns of viewing of all homes in a multichannel environment, a much more useful sample base for any examination in the long-term strategic question in the development of new television markets than that utilized by PETAR.

Bekkers rehearses the argument of the expansion of the amount of domestic, other terrestrial, and satellite-delivered services to establish the incontestable argument that the amount of television available has increased dramatically in recent years and continues to do so. For example, the number of foreign stations available in the Netherlands has increased from 4 in 1973 to a dozen or more today. Around 60% of homes are connected to a cable system, and 15% to jointly shared satellite dishes. The average television home in the Netherlands can receive 6 foreign channels, and 30% of homes had a VCR as of 1986. Another factor which might make the Netherlands a particularly favorable market for new channels is that 80% of the Dutch speak German either well or reasonably well, and 75% speak English moderately well. The Netherlands therefore provide, if not an ideal, certainly a good context within which to examine in the potential for new services to create new markets.

Bekkers points out one of the main stable factors in Dutch viewing habits—indeed, in my view, of almost all national viewing habits—that “whatever is made in the Netherlands is always very popular: Dutch products always

Table 8. Netherlands Viewing Time Within Sky Reception Area, March 1985, 1986, 12+

	1985 (%)	1986
Sky	9	5
Music Box	1	1
Europa TV	—	1
BRT1	4	3
BRT2	2	3
ARD	3	3
ZDF	3	2
	22	16
Nederland 1	55	59
Nederland 2	24	25

Source: Wim Bekkers, ESOMAR, 1987.

draw more viewers than similar products from abroad." When German and Belgium television were available in the 1970s, interest in them was in the region of no more than 1-4%. Nevertheless, by the 1980s when Netherlands television was awash with potential choices for the viewer, Bekkers' research reveals a fascinating picture of considerable resistance among the Dutch public to exercising such choice. In 1980, 89% of television viewing went to the domestic channels, and 11% to foreign stations. Bekkers then looked at the patterns of viewing within the Sky Channel reception area. His findings are reflected in Table 8.

Bekkers points out that while the amount of viewing is increasing as the total amount of television increases, the extra viewing is not going to the new channels, but rather to the traditional domestic channels. For example, in March 1985, audiences in the Netherlands averaged 129 minutes daily viewing; 105 minutes went to Ned 1 and 2, and 24 minutes to other channels. While the average viewing time had increased one year later to 140 minutes, Ned 1 and 2 maintained their popularity with viewers tuning in on average 119 minutes per day, while viewing of other channels dropped to 21 minutes.

The strength of Bekker's study is that it challenges one of the central myths of world television: that new services offering bought-in television, particularly from the United States, are not only ubiquitous but immensely popular with the audiences of the world. Not so. The strengths of national cultures, the power of language and tradition, and the force that flows, still, within national boundaries, have been grossly underestimated by those who have sought to establish, in this case, Pan-European markets. Hence the qualifications one has to set against the apparent potential advertising revenue which waits to be harnessed, because as will become clear it is difficult to see how new satellite and cable-delivered services could sustain pro-

gram schedules which are able to seriously dent that disposition, to cast the eye inwards rather than outwards.

While it is therefore objectively true that potential growth in advertising revenue exists, it is equally true that such potential is national rather than transnational. Toby Syfret (1987) of J. Walter Thompson, writing from within the very different world of a major advertising organization, nevertheless nods in the direction of this conclusion:

It is questionable whether budgets for transnational and pan-European TV campaigns would exceed 5% of total potential expenditure during the next few years if current restrictions on the supply of commercial airtime were to be lifted. It is not possible in any case that they would exceed 10% of the potential. By implication...even if reception were no problem and everyone in Europe had immediate access to satellite TV, centres of broadcasting strength would remain national. They would not shift, as has often been supposed, to transnational "superstations."

What Syfret is correctly suggesting is that the real battle for the future of the new television services and their attendant markets will, in all probability, not lie in the creation of new transnational markets, through the production of what Jeremy Isaacs, the first chief executive of Channel Four, called "Euro pudding," but in the reconstruction of national markets currently and traditionally dominated by public service broadcasting organization. The fact remains therefore that, even if the problem of reception is solved—for example, by the creation of extensive broadband cable networks or the ready availability of satellite dishes (the latter being more likely than the former)—the new television services will still have to produce programs of a quality, range, and national character on the continuing basis and at enormous expense if the status quo is to be broken and new markets created. It follows that if new markets are to be successfully created they will not only *not* be dominated by American product, but sociologically and culturally they *cannot* be so dominated. The initial floundering of the new television services which we have witnessed recently is largely rooted in this simple problem—simple, that is, to identify, but not to resolve. If, in the first instance, the new marketeers are marching down a road laden solely or even predominantly with U.S. product, or with product which is essentially "transnational" in nature, they are marching to oblivion.

I am not saying that U.S. television product will not be used by most television systems. Indeed, in some instances there will be a good deal of such programming, and some of it will even be successful. I am saying that U.S. product alone could not last the course, especially if the new markets are to be created through the use of enormously expensive delivery systems such as cable and satellite. The really powerful productive forces within television are and will continue to be national. Where it is used, U.S. television will be

as a kind of televisual polyfilla, plugging the gaps in the schedule but with no seminal influence on the structure of the audience and therefore on the economics of future television.

When one undertakes this Cook's tour of world television the impression one is left with is not of uniformity of a single cultural voice and the immersion of all others but of the increasing assertion of cultural diversity on the part of national audiences. As I grubbed around for evidence, however, one dimension which slowly emerged was of the responses not just of the public but of the established media institutions who are increasingly making strategic decisions to kill off precisely those vehicles of the new media which, it has been alleged, will dump their product across the surface of the globe. I am, of course, making the assumption that the only way in which there will be further proliferation of U.S. product will be through the recreation of the individual global television markets on the back of the development of satellite and cable technologies. It could be that the proliferation will take place through the transformation of the existing terrestrial television systems as they shift and maneuver in response to the challenges of that cliché, the third age of broadcasting.

THE OLD ONES: THE STRATEGIC RESPONSE OF ESTABLISHED BROADCASTERS

In examining the potential for new markets, one needs to allow for the activities of those who already dominate the television markets of many parts of the world, and certainly of the major industrial societies. The whole development of television within Europe, for example, has been based on the principle of public service broadcasting. In examining the future of television markets, and particularly in assessing the likely success of services established outside that tradition, one should not underestimate the strength of those public service traditions, the power of the expectations which have been created among national audiences, or the ability of public service institutions to defend their corner. I am not suggesting that these institutions are inviolable, nor indeed that they are not capable of supreme acts of folly, and of strategic and tactical error. I am merely emphasizing that historically, their power has flowed from their being deeply embedded in national soil. In 1986, the BRU published the results of its own research (Morrison, 1987) into what the British public wanted for the future of television. The context was the campaign then underway for the BBC to be made to take advertising. What the research showed was that while there was support at one level for the BBC being made to take advertising, it was highly qualified support. The public would not be happy, for example, with such arrangements if the programming subsequently offered was considered

inferior to that which was previously available. Of the 54% who agreed to advertisements, only 29% said they would still accept them if it meant less choice of programs, a number representing only 16% of the total audience for television. However 75% of those wanting advertisement on the BBC still wanted them if it meant that while the total range of programming available was reduced, they had more of their favorite programs. The group represents 40% of the potential audience. What people would object to is greater scheduling of American programming: 65% of those who favored ads on the BBC changed their mind if it would mean more American programming on British TV. Those who would be prepared to accept the trade-off of ads on the BBC and lower license fees, but more U.S. television, amounted to only 14% of the population. This pattern—of the British television audience being extremely wary of anything which changes or affects adversely the kind of public service television to which they are accustomed—repeats itself across the whole of the research.

It would be wrong, however, to place too much emphasis on the protective significance of public attitudes, but public broadcasters possess another immediate advantage even as they appear to be under siege: their budgetary advantage over all new services. In Britain, the annual program budget for British Satellite Broadcasting, the new DBS service, will be £100 million. In its first years, operations were planned for 1989-90 but were actually up in 1990-91. The joint revenue of the BBC and the ITV companies by then were between £2-3 billion. In Germany, the operating budget for SAT1 was about \$75 million and for RTL Plus \$35 million—again, contrasting with the hundreds of million of Dms at the disposal of ARD and ZDF.

Basic wealth may not be everything, but in the words of Michael Caine, "I've been rich, and I've been poor, and believe me, rich is better." Their basic wealth clearly gives the large existing stations a considerable head start in developing the television markets of the future, and public service broadcasters throughout Europe are moving to close off their markets from the "predators" of the new services. In Finland for example, TV3 (OKA) was created by YLE, MTV, and Nokia precisely in response to the threat from new media and to advertising revenue. Its programming—film, sports, entertainments, serials, and childrens' programs—anticipates precisely the kind of programming which the new television services will have to offer if they are to prosper. One commentator noted: "At MTV, desperate attempts to recapture audiences and reverse the trend of diminishing advertising revenues have resulted in an unprecedented rush of production quickies: low comedy and quiz shows abound" (World Broadcasting Information, 1987).

In Germany, ARD and ZDF are ever more eager to pursue mass audiences and to kill off their potential competitors at birth. Friedrich Nowotny, *Intendant* of WDR, observed: "If public service broadcasting does not survive the battle for rating, there will be no minority and high quality news and in-

formation programming in the future." This is what I would call the temporary barbarism strategy, in which the theology of public service, with all its worthy ambitions, is abandoned at least momentarily, and more populist tactics employed in program strategies. A simple index of this is the increase in the number of movies shown on the two systems, from 437 in 1980 to 660 in 1984. Recently ARD spent Dm 460 million on 2,700 movies. One commentator observed:

Both ARD and ZDF have been trying to make their programmes more attractive to a large audience, partly to avoid conservative criticism and to prove that there is no need for commercial television, partly to get higher ratings and thus showing that their programmes are well accepted by the audience. . . . On the other hand both systems have replaced a considerable portion of foreign material by German production in the early evening entertainment programmes that are the background for advertising. They particularly made strong efforts in producing popular serials with plots and protagonists that are more familiar to the German audience than those of the foreign productions. In general the programmes for framing the commercials are selected more carefully to attract those audience segments particularly middle-aged and younger people, in whom the advertisers are interested. (Schultz, 1986)

In Norway, the appearance of satellite television led to a reexamination of the role of television and the balance of policy between the potential defensive capacities of national television and the cultural threat imposed by "foreign" satellite-delivered television. The research department of NRK (Norsk Rikrkringkoisting) the Norwegian public service broadcasting organization, set out "to develop a type of research which could serve public broadcasting in a new setting of international commercial competition. In order to do so, we had to find out what would be the new obligations for public broadcasting. . . (and) the new competitive environment" (Lund & Rolland, 1987). The process of change and challenge to the public service broadcasters began in 1981 with the election of a conservative government which set out to break the NRK monopoly. The response from within the NRK has been to articulate the virtues and superiority of domestically produced programming: "The general opinion is that Norway must adapt herself to the realities of the satellite age. The answers to the challenge from abroad is to have more and better national television."

In March 1987, the President of Radiotelevision Italiana [RAI], Manca, said that they would need to stress the fact that RAI is "an entrepreneur" by searching for all opportunities to have joint initiatives with private television to compete with the big multinational companies which operate on the world scene. It was a statement he echoed a few days later when he called for cooperation between public and private television to develop DBS services

with an Italian flavor (BBC World Broadcasting Information, 1987). In Spain, while the Council of Ministers gave the go-ahead for three independent television channels, they insisted that each should carry at least 40% domestic productions. In another interesting development, it was decided in May 1987, that the Television Espanola TVE2 studio in Barcelona would opt out from the state network for three hours a day from Monday to Friday and offer programs in Catalan, including language courses, children and young people's programs, quiz shows, and news programs.

In other instances the existing large terrestrial systems are being privatized and set in competition with the remaining public service institutions, effectively carving up the television markets before the new services have sufficient time to develop. In Britain there is also much talk of the government using spectrum fees for the allocation of the franchise for the commercial ITV systems, of its "privatising" Channel Four, as well as its introducing a fifth, local television system. In France in 1987 the government privatised TF1, the main national channel, in the midst of a string of developments of new television channels. This left only Antenne 2 and FR3 in the public sector, both admittedly under siege. In June 1987, in an effort to further nurture the newly privatized TF1, Prime Minister Chirac announced that he felt it only right that only the private sector should be allowed to carry advertising revenue. TF1 was expected in 1987 to take about 50% of the 7.6 billion francs spent on television advertising. With nearly 2 billion spent on the other two public channels, and the fact that all its commercial rivals do not reach the whole of France, the position of TF1 will be greatly strengthened, particularly in its efforts to fulfill the ambition of its first chairman, Patrick le Lay, to invest heavily in French productions.

Indeed it is precisely these kind of responses which have led some commentators to question the future survival of public service broadcasting. This is not because the institutions as such will be destroyed by new competition, but because they will successfully fight off the competitors and by in so doing change into something closer to the main principles of public service. This is not to say that they will simply offer a diet of imported television, rather that they will bleed the vigor from these national systems and replace them with a domestically produced television which is altogether too bland and "nice." They will, in turn, also seek to sell that product on the international market, adding one more complexity to the pattern of distribution of television product.

It is, however, not just the broadcasters of the major industrial societies who are responding. In New Zealand, the English-born director general of the New Zealand Broadcasting Corporation, Julian Mounter, has increasingly encouraged the production of programs domestically. As one commentator stated:

Mounter has insisted on new directions which many critical New Zealanders have been urging on television: More Programmes for and about Maoris and Pacific islanders, more programmes on the arts, industry and science, more New Zealand drama hours and more money, a jump in local production to 50% of prime time in the next couple of years. . . (Mounter argues it is time) to reflect our culture, encourage what is good about New Zealand and perpetuate the differences between New Zealand and the rest of the World. (Duncan, 1987)

It is important to emphasize that this policy is not born outside of any grasp of real problems which will be faced in seeking to realize it. Nor is it born of idealistic musings, though national pride should never be discounted. Rather it follows logically from the fact that Mounter has seen the research and knows that New Zealand-produced television is more popular than imported television.

In Africa, there are interesting numbers of agreements to coproduced and exchange programs. For example, in February at the 10th Pan-Africa Cinema Festival of Ouagadougua in Burkina Faso, a number of countries agreed to set up the exchange programs, including Benin, Burkina Faso, Guinea, Mali, Niger, Senegal, Togo, Tunisia, and Zaire. In May, Egypt and Madagascar agreed to exchange radio and television programs. Straws in the wind or meaningless acts? At this stage, it is almost impossible to know, though one must remember that all of these countries are relative newcomers to the television scene, and it could just be that what we are witnessing in these tiny events and agreements is the planting of the seed of something much more long-term and substantial. Writing about the situation in Australian television, one producer commented: "People were worried that Australian producers would end up making mid-Pacific product, but now there is a real concentration on legitimate Australian production for the international market" (Broadcast, 1987).

CONCLUSION

I do not want to linger over these concluding thoughts, since they have been fairly explicit throughout the whole paper. It does seem to me, however, important to make one related point, which is that it is extraordinary, given the amounts of money spent on so-called market research, that the level of understanding of the audience remains so limited and at times utterly confused. There is clearly a crying need, intellectually as well as commercially, to have a much more substantial grasp of what one might call the biography of viewing, and to see and grasp the minima as well as the maxima the lives of the television audience. One of the more important developments in

European communications research is the growth of ethnographic studies of television audience, seeing them as richly complex groups of individuals, rather than abstract statistics with skins. It is a development to be wholly welcomed. To offer a few final thoughts:

1. There has been a widespread belief that U.S. television has traditionally been ubiquitous and popular: This is not true.
2. There is a conviction that the new distribution technologies will readily pour their wares over the populations of the world: This is also not true.
3. There is a belief that the production of television products will become concentrated in a small number of centers, particularly in the United States: Once again, not true.
4. There are assumptions that international television product is the cultural avenue to the global village, whatever that is: Again, this is not true.

Instead, the reality is that U.S. television was never as popular, or even widespread as was assumed. National populations basically prefer national programming and the new distribution technologies are in for a very rough ride, as national governments and broadcasters are and will continue to fight back. In fact, the reality of the future of television is that it will not be a seamless robe woven in Hollywood, but a patchwork quilt, with some patches larger than others, but marked by variety and size, and dyed in many, many colors.

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