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Trends in the Global Traffic of Television Programs

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The present debates on international communication have had different dimensions. At the global level, issues such as the transnational concentration of information production and dissemination, reflected in the debate on the new international order in the field of information, have been on the agenda. On the regional level, international cooperation and integration have been discussed among the poor countries as well as in areas such as Europe. Furthermore, the present international political climate has brought certain ideological elements to the debate.

In this chapter, an empirical analysis of the amount and nature of the present international flow of television programs, as part of these processes, is presented. The data are from a two-week period in 1983, and the results can be compared with respective figures from 1973. In both of these years I was in charge of gathering the empirical data for Unesco from more than 50 countries throughout the world.

The basic information on the general amount of foreign versus domestically produced material in percentages, shows that the global average of imported programs is approximately one-third of the total time programming. When compared with the 1973 figures, the 1983 situation is not radically different, although there are interesting regional developments.

Although international communication and world television can be discussed as a global phenomenon, now reaching an audience of more than one billion viewers, the transmitters and receivers world wide are strongly concentrated in a few regional centers. To be more precise, almost half of the world television audience is in the United States and the Soviet Union.

Among the 10 largest television audiences, covering three-fourths of the world audience, there is only one country from the developing world: Brazil. The basic global flow of television programming is among eight rich countries which have most of the receivers and the largest audiences. These countries are the United States, United Kingdom, Canada, Japan, Australia, Germany, France, and Brazil.

This chapter begins with an analysis of the two big television countries, the United States and the Soviet Union, which can be expected to be rather self-supportive in their programming. This is followed by a look at Western and Eastern Europe, where regional cooperation is rather advanced and efforts towards unification are strong. Finally, different regions of the developing world are reviewed briefly.

UNITED STATES

Among all other nations of the world the United States is a particular case in international television program flow, for several reasons. One, the domestic market for television programs in the United States is without equal in any other country. Two, U.S. producers and companies are the largest program exporters in the world; and three, in relation to total output, U.S. television networks import fewer foreign programs than any other country. One might even claim that foreign programs are not shown at all in the United States.

In truth, imported programs account for approximately 2% of all programming in the United States. If commercials were included in the calculations, the figure would be even lower. Furthermore, the sources of these imports are very narrow: two nations, Mexico and England, account for almost half of U.S. imports. Entertainment and culture are the dominant categories of programming purchased by the U.S.

SOVIET UNION

The data on Soviet television are from the two national networks broadcasting in Russian. Only programs that have been imported from outside the Soviet Union have been classified as foreign. However, the Soviet television also has some characteristics that deserve special attention; in particular, its multinational character. In addition to the two all-union networks, 120 regional or local stations are in operation, broadcasting programs in most of the languages of peoples living in the country.

When compared with the 1973 data, the total share of imported programs has increased from 5% to 8%, and to 18% in prime time. In contrast, that of the U.S. television has remained about the same. Approximately one-third of Soviet foreign programs originate in eastern European socialist

countries, and more than two-third elsewhere, primarily in the Federal Republic of Germany, France, and the United States. Imported programs appear mainly in entertainment, children's programs, and cultural programs. There are also coproductions with other countries.

WESTERN EUROPE

Western Europe is here defined as the area encompassed by the European Broadcasting Union, which means, for example, that Yugoslavia is included in the aggregate total of Western Europe. It should be emphasized that European cable systems are not included in these calculations, which most probably means that the present figures are too low with respect to imports rather than too high. There are some case studies from Italy, for example, which show that as much as 80% to 85% of the total broadcast time of the private stations consist of imported material, mainly from the United States.

With these qualifications, the data demonstrate that approximately one-third of Western European programs are imported. Here the category "imported" refers to programs from other Western European countries in addition to those from other regions. In Britain, for example, where the International Broadcast Authority (IBA) strictly limits material from countries other than Britain, programs from other EEC countries are not classified as foreign. There are special rules for programs from other Commonwealth countries, too. In the present study, however, all imported programs are classified as foreign.

Almost half of imported programs in Western Europe originate in the United States (44%). More than 10% of total Western European broadcasting time is composed of American programs. Other major sources of imports are the United Kingdom, the Federal Republic of Germany, and France. When compared with the 1973 figures, the U.S. share has decreased slightly, although it may have increased in the private cable systems not included in the present analysis. Eastern Europe, including the USSR, provides approximately 3% of Western European imported material. It is shown in a few countries only, mainly in France, the Federal Republic of Germany, England, Finland, and on the Basque television system in Spain. There are no changes in imports from Eastern Europe when compared with the situation 10 years earlier. In general, imported programs are mainly entertainment, but there are notable differences between individual European countries (see Table 1).

EASTERN EUROPE

The figures for the Eastern European region, excluding the Soviet Union, show that the share of imported programs in Eastern European countries

Table 1. Percentage of Imported Television Programs in 1973, 1983, and Prime-time 1983 (measured in programming hours).

Country and Broadcasting Institution	% of Programming Imported		
	1973	1983	1983 Prime Time
UNITED STATES			
United States/comm.	1	2	2
United States/educ.	2		
SOVIET UNION	5	8	18
WESTERN EUROPE			
Austria	—	43	61
Belgium/BRT	—	28	33
Belgium/RTBF	—	29	28
Denmark	—	46	32
Federal Republic of Germany:			
ARD	23	13	7
ZDF	30	23	23
Regional	—	24	—
Finland	40	37	37
France	9	17	17
Greece	—	39	—
Iceland	67	66	66
Ireland	54	57	58
Italy	13	18	19
Netherlands	23	25	24
Norway	39	30	28
Portugal	35	39	—
Spain	—	33	35
Spain/EIT B Regional	—	74	—
Sweden	33	35	28
Turkey	—	36	49
United Kingdom:			
BBC	12	15	21
ITV	13	14	20
Channel 4	—	26	15
Yugoslavia	27	29	22
EASTERN EUROPE			
Bulgaria	45	27	21
German Dem. Rep.	26	30	39
Czechoslovakia	—	24	25
Hungary	24	26	35
CANADA			
Canada/CBC	34	32	24
Canada/RC	46	38	31
LATIN AMERICA			
Argentina/Canal 9	10	49	53
Brazil	—	30	23
Cuba	—	24	9
Ecuador	—	66	70
Mexico	39	34	44
Venezuela	—	38	42

Table 1. (Continued).

Country and Broadcasting Institution	% of Programming Imported		
	1973	1983	1983 Prime Time
ASIA & THE PACIFIC			
Australia	57	44	46
Brunei	—	60	28
People's Rep. of China	1	8	—
Hong Kong:			
Asia TV Chinese	31	24	16
Asia TV English	40	64	72
Asia TV Ltd.	—	27	9
India/Calcutta	—	3	6
India/Delhi	—	11	10
Republic of Korea/Munhwa TV	—	16	0
Malaysia	71	54	31
New Zealand/one	75	72	64
New Zealand/two	75	75	66
Pakistan	35	16	12
Philippines	29	12	20
Philippines/Metro Manila	—	40	—
Singapore:			
Channel 8	78	55	70
Channel 5	78	70	66
Sri Lanka	—	24	22
Vietnam	—	34	—

Source: Varis, Tapio, "The International Flow of Television Programs," *Journal of Communications*, Winter, 1984.

has increased during the 1973-1983 period, with the exception of Bulgaria, which has been explained as a statistical chance. The share of imported programs in Eastern Europe is roughly the same as in Western Europe, approximately one-third. The sources, however, seem to be more diversified. For example, the Soviet programs do not have as dominant a role in Eastern Europe as American programs in Western Europe. Only 6% of Eastern European broadcasting time is made up of Soviet programs whereas, for example, 12% are from Western Europe and another 6% from other Eastern European countries. Of the total Eastern European imports, Soviet programs make up approximately one-quarter, whereas almost half originate in Western Europe. Imported programs appear in several categories, mainly entertainment, children's programs, and cultural and educational programs.

CANADA

The data for Canada are not included in figures for Western Europe, although Canada is taking part in the European process of security and cooperation.

Neither are they included in the U.S. figures, although due to the geographical location of the country, the availability of American broadcasting is significant. Research data from the Montreal area, which is regarded as a representative area for most of the country, confirm that the United States accounts for the vast majority of imported programming, on private and public, French and English networks, except in the case of the educational network, Radio-Quebec. Approximately 40% of Canadian programs are imported, and almost a third of all programming is made up of U.S. material. As much as 70% of all imported programming originates in the United States, with the rest coming mainly from France, the United Kingdom, and Italy. The movie and entertainment categories comprise the highest proportion of imports.

LATIN AMERICA

The Latin American region is represented in the present study by Argentina, Brazil, Cuba, Ecuador, Mexico, and Venezuela. The amount of imported program material varies from one-fourth (Cuba) to two-thirds (Ecuador) of the total volume of programming. On average, approximately half of the programs broadcast in the region are imported. During prime time, the share of imported programs is higher than average.

The entertainment category is predominant in all Latin American countries analyzed in this study: Approximately half of the total transmission time is devoted to entertainment, with the exception of Cuba where the figure is one-third. Most of the imported materials are entertainment. The sources of foreign programs in Latin American countries are the following: the United States (together with production by the multinational corporations) dominates with three-quarters of the imported material. Programs from Latin American countries themselves make up 12% of the imported material. Western European programs represent a few percent of the total imported materials.

There are considerable differences among the individual countries of the Latin American region. In Argentina 38 television channels were studied. Four of these were located in the Federal capital and 24 in the provinces. Of the imported programs, 73% came directly from the United States and another 16% were multinational in character. In 1973, the percentage of American imports was estimated to be 75%. Mexico was the origin of less than 10%. Western European imports, which in 1973 were 5-6%, accounted in 1983 for approximately 2% of the total imports (see Table 2).

In Brazil, six television channels were analyzed. Of the imported programs, 93% came from the United States. Mexico produced 2% and the balance was mainly from Western Europe.

Table 2. Distribution of Programming by Region and Category, 1983.

	U.S.		Canada		Latin America		Western Europe	
	all	imp.	all	imp.	all	imp.	all	imp.
	%	%	%	%	%	%	%	%
Informative	19	1	35	—	16	20	29	5
Educational	7	0	8	—	7	13	9	10
Cultural	6	9	8	24	2	14	6	12
Religious	3	—	2	28	1	18	1	11
Entertainment	40	2	36	72	44	71	35	53
Sports	4	2	3	—	5	18	8	36
Other (ads, children's, unclassified)	25	0	8	35	25	17	12	30
Total %	104		100		100		100	

	U.S.S.R.		E. Europe		Asia	
	all	imp.	all	imp.	all	imp.
	%	%	%	%	%	%
Informative	30	2	20	7	15	30
Educational	14	—	13	9	7	13
Cultural	15	4	12	21	3	6
Religious	—	—	—	—	2	9
Entertainment	27	14	36	49	48	53
Sports	9	32	10	43	10	28
Other (ads, children's, unclassified)	5	5	9	21	15	41
Total %	100		100		100	

Note: The figures are indicative of the region as a whole as represented by the countries included in the study.

Source: Varis, Tapio, "The International Flow of Television Programs," *Journal of Communications*, Winter, 1984.

In Cuba, two channels were analyzed. The Soviet Union and the United States had almost equal shares (23 and 22% respectively), the German Democratic Republic 13%, other Socialist countries 8%, Western European countries 20%, and other countries 11%.

The data for Ecuador are based on material from nine television channels. The imported programs originated in the United States (55%), Mexico (23%), other Latin American countries (15%), Western Europe (5%) and other non-Latin countries (2%).

In Mexico, six channels were studied. The imported programs originated in the United States (74%), the United Kingdom (9%), other Latin American countries (10%), Europe and the Soviet Union. A few minutes came from Asia. In comparison with the 1973 figures, the percentage of American and British imports remains unchanged.

ASIA AND THE PACIFIC

The region of Asia and the Pacific includes countries that have great differences in the size, nature, and history of their broadcasting facilities. Among the 14 countries in the Pacific Basin, there are two fairly advanced television broadcasters, Australia and New Zealand. The inclusion of data from these are included here in the countries with the aggregate total for the region, thus introducing some distortion as far as developing countries are concerned. Japan is not included in the present data.

Certain general aspects of television in this region are important for an understanding of the data. For instance, in Asia, television has largely remained concentrated in urban areas, especially in countries such as India, Malaysia, Pakistan, the Philippines, and Thailand. Also, there are a limited number of transmitters, limited transmission time and exorbitant costs for television receivers in some of the countries. Finally, many countries are home to several languages, dialects, and cultures.

On the average, the Asian audience has access to about 10 hours of television broadcasting every day. The lowest is approximately three hours (Vietnam) and the highest, 20 hours (New Zealand). It can be concluded that the share of imported programming increases dramatically with the increase in transmission hours. Television is primarily used for entertainment and information in the region; these two categories constitute approximately three-fourths of total transmission time, and considerably more during prime time.

The volume of imports is largest among children's programs, followed by entertainment. Information, educational, cultural, and religious programs, however, are largely produced domestically. The situation varies from station to station and country to country. Comparisons with the 1973 situation are not always possible because new countries have since initiated television broadcasts in the region. The People's Republic of China had very few imported programs in 1973 (1% mainly from Northern Korea, Albania, and Rumania), but now shows 8% imported programs. This increase is partly attributable to the growing impact of educational material and information programs from the United Kingdom. The Philippines has 72 television stations throughout the country and, in 1973, imported two-thirds of its foreign programs from the United States and the rest mainly from the United Kingdom. In 1983, the U.S. share of imports is close to 90%.

Television in the Philippines is primarily an entertainment medium: 62% of the prime time and half of the total time are allotted to entertainment programs. The U.S. share has also been high in countries such as the Republic of Korea, Hong Kong and Malaysia.

It should be noted that individual broadcast stations often reveal very stark contrasts in content. In India, for example, one Calcutta station is concentrating on domestic productions and imports very little, whereas the Delhi station has more foreign programming.

ARAB STATES

As to the Arab countries, certain specific characteristics concerning television broadcasting in this region also deserve consideration. Although television activity began in the region in the 1950s, most of the stations started in the 1960s. Exchanges between Arab countries have recently been intensified by the initiation of their own regional satellite system, Arabsat. The language of broadcasting plays a special importance in this region, as there are classic Arab, local Arab dialect, and foreign languages.

The results of this study confirm that there is a clear tendency to use the classic Arab language for broadcasting. On average, slightly more than 40% of total programs are imported, a figure which includes programs from other Arab countries. Compared with the 1973 figures, the share of imported material appears to have decreased in the region. Foreign policy changes obviously influence foreign television programming. In Egypt, for example, almost one-fifth of the imported material was from the socialist countries in 1973; 10 years later they are not visible in the statistics at all.

U.S. programs are still dominant in most of the Arab countries, comprising one-third of all of the imported programs. In the People's Democratic Republic of Yemen, their share has decreased from one-quarter of imported material in 1973 to 8% in 1983. In Syria, U.S. programs make up 23% of imported programs, while Soviet television programs account for 17%. Arab countries import relatively more from the socialist countries than Latin American, Asian, or African countries. Obviously, French imports dominate in several Arab countries, especially in Algeria, Tunis, and Lebanon. Imported programs are dominated by the categories of television plays and documentaries. Inter-Arab exchanges seem to have developed well.

AFRICA

Africa is another region where generalizations about program flows threaten to be misleading. For example, there are 46 broadcasting organizations in sub-Saharan countries, but almost one-half of the television stations are in

Nigeria. The Nigerian television stations broadcast a little over half of Africa's total. Moreover, as in other developing regions of the world, television sets are concentrated in urban areas, and the cost of a receiver puts it beyond the means of the average income earner.

Due to Nigeria's dominant role, the present statistics were calculated first including, then excluding, Nigeria. When Nigeria is included, the share of imported programs is 36%; when it is excluded, the figure is 60%. U.S. programs make up about one-half of all imported material, and one-fifth of total output. Another major source of imports is the United Kingdom. In contrast, programs from the socialist countries very rarely get time in African broadcasting. Instead, the international news film agencies and international organizations are a major source of program material in African countries. No inter-African television exchanges exist.

Although American and British programs dominate English-speaking Africa, the French have a strong influence in Francophone Africa. In Senegal, for example, 60% of imported programs originate in France and only 5% in the United States. Imported programs are mainly entertainment or information programs.

CONCLUSIONS

The trends discovered in the 1973 study seem to persist in 1983: one-way traffic from the big exporting countries to the rest of the world, and a dominance of entertainment material in the flow. However, there are also important regional developments in various parts of the world. World television remains strongly influenced by the United States. This is especially true of the poorer regions of the world, but also of Western Europe. In Europe, however, the regional process of integration has strengthened arguments for improving inter- and intra-European exchanges and program production. This has been especially true in the plans for direct broadcast satellites, first in Nordic countries and more recently in the European community. Consequently, serious discussions about quota systems for foreign programming have been activated in Europe. The problems of cultural identity, however, have been discussed more and earlier in countries like Canada that have been under strong foreign domination in the field of communication.

European discussions have also addressed East-West program exchange. According to the 1984 figures, there are still more western programs in the East than vice versa, although there seems to be a slight increase in the number of eastern programs on West German television. The eastern broadcasters, however, have slightly increased their share of western programming. In assessing these exchange figures, one has to remember that there are a number of practical problems such as financing, and that not all of the differences have ideological or political roots. Austrian and Hungarian broadcasters have discussed improving their cooperation in this field. One

recent European plan is to extend the German-Swiss -Austrian satellite broadcasts to Hungary, to be received there by cable.

In most Third World countries, television remains a medium found in urban centers and available to a relatively wealthy segment of the population. Furthermore, foreign programming originates almost exclusively in the major western countries and tends to have a dominant role in the program content of individual countries. The increase in regional exchanges is particularly notable among the Arab countries and in Latin America. In the Arab countries, approximately one-third of the imported programs originate within the region. Throughout Latin America, the figure is around 10%. From a global perspective, there remain great regional differences in the amount and origin of the flow between nations and regions.

This descriptive analysis reports on program flows today in the traditional broadcast television media. However, due to technological development, a rapid change in the traditional flow pattern is taking place in the new markets of video cassettes and other nonbroadcast media. The pattern of the international flow in these markets is largely unknown, but it may be even more concentrated than traditional patterns. Video cassettes may also open up new alternatives to minorities and foreigners in other countries.

Under the present economic conditions, it is difficult to predict how rapidly the deployment of the new communication technologies will take place. It has been estimated that direct broadcast satellite channels will soon be flooding western Europe with television programming. According to one estimate, most households in Europe should be able to receive at least a dozen different satellite-delivered channels by the end of this decade, while many densely populated areas, with extra equipment, could have doubled this number.

So far the introduction of satellites has not changed the basic patterns of the flow of television programs and news. Although they have contributed to the improvement of regional exchanges in some cases, there is a trend toward transnational concentration. The new communication technologies may offer some alternatives for the future. But it may also be that the rapid development in communication technologies and services, including all kinds of data offerings, only increases the gap between those who have access to information and the means to use it to influence others, and those who do not have this capability.

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