

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

by Michael Tracy

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✓ Test for \$

One of the central images of modern political analysis - whether engaged in by allegedly detached social scientists political or by 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, economic domination, but also linkages of culture. The proposition is that through the export of cultural products - principally, but not only, in the form of tv programmes - from a relatively small number of countries to a much larger number of recipients, 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 image and likeness of the exporter. The articulation of this theme has been principally in the works of a number of key writers, and the villain of the piece is usually held to be the United States. 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 America and South America; and the culturally and intellectually underdeveloped world of the captive populations of the developed societies. Astride these myriad minds 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.

In the most recent past, we have had a reworking of this theme as new technologies of distribution seemed to translate such dominance into certain and continuing inevitability. In Britain, indeed throughout Europe, we have lived for some time with the widespread belief that two things were about to happen: the sheer "space" for television was "about to expand enormously", and that 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, 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 the terrain of the so called first world, but the rest of the two-thirds world, the scenario has seemed to be even more powerful. The swamping of indigenous cultures by a tidal wave of international television spewing forth from the mouth of the volcano which Hollywood. 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 can be few moments in the history of man's quest for knowledge and truth, power and wealth when so much time and effort have been put into getting something so utterly wrong.

Hidden within the "inevitable dominance" thesis are I suspect two deeply questionable assumptions. The first is of the power of television, the view that it can override all other institutions that go to 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, while the other threads of influence within people's lives remain unalterably invisible.

The second assumption is of the ubiquity and popularity of television which originates from within the United States. 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. The truth of both assumptions, however, is that at best they lack conceptual and empirical depth, at worst utterly misconceive the place of television within social influences and the simple facts of what the populations of the world enjoy on television.

It is from within that framework of acute scepticism about the worth of the contemporary discussion of television of any kind, that this paper has been written. I was asked specifically to look at some of the non-economic 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 Burkina Fasso, or even that other third world country in the making, the United Kingdom.

My immediate response must be that there is nothing inevitable, as distinct from likely or theoretically possible, in such domination. It is anyhow wrong to see 'rich countries' in tv terms as coterminous with the United States and to a lesser extent the Anglo-European societies if for no other reason than the fact of ample evidence 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, and between the countries of the EEC, and also within that other 'bloc' in the East. I will also probably end up by suggesting that this plural structure of production and distribution is in its infancy, and will grow as the century proceeds and television markets evolve. I may also suggest that this global televisual laticework will be nurtured by the sheer force of local and national cultural taste. I am not for one minute suggesting that there will not be much US product whizzing round the globe in future decades. I am suggesting that there has historically been an overemphasis on the ubiquity and presence of that material and a gross overestimation of its strategic strength.

In this paper I want to expand on the threads of these thoughts:

1. by considering evidence of the existing availability of international television, and to a lesser extent ;
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 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.

1. Offerings

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.¹ This study, which covered some 69 countries, was an update on a similar survey completed a decade before. Varis finds few overall changes since 1973 in the pattern of programme flow, but does indicate a trend toward greater regional exchanges along with the continued dominance of a few exporting countries. The 1972-3 study showed that there was, in effect, a one way flow of tv programmes internationally, from the North Atlantic basin to the rest of the world, and that entertainment dominates the flow. In his updated study Varis used as a sample the two weeks from Jan 31 to Feb 13 1983. Varis' 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 uni-directional. Certainly he shows that overall, imported programmes average one third or more of total programming. My own reading of the Varis data however is that even in its own necessarily limited nature it consists of something far more substantial, if complicated, 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 US imports little - about 2% of its total television output, mainly from UK, Mexico, Latin America, whereas in Canada the vast percentage of the imported material is from US. In Latin America entertainment programming dominated all the tv studied, accounting for about 50% of total transmission time. Most of these imports are entertainment programmes: 75% of the imported material is from the US; 12% from Latin America; a few percent from Europe. In Western Europe there are important differences between countries. Overall, 30% of tv programmes are imported, 44% of which are from the US, with US programmes accounting for 10% of total transmission time in Europe in 1983, though much of that is outside prime time. 16% of imports of television into Europe are from the UK; Germany and France providing 5% to 10%; Eastern Europe and USSR 3%.

In the USSR itself 14% of entertainment programmes are imported, and in Eastern Europe programmes are imported from 26 countries, 43% of which came from other Eastern European countries, and 57% from outside that area. 21% came from the USSR. In Asia and the Pacific 36% of all tv is imported, but the variations are enormous: for example from 75% for TVNZ's Channel 2 to 3% for a Calcutta station. The US and UK are the main source of programmes, along with Japan for children's programmes, documentaries and movies, and films from India, Hong Kong and Taiwan. China produces almost all its own tv, with a little educational and news material from the UK.

In the Arab countries 42% of tv is imported: one third comes from other Arab states, and 32% of non-Arabic imported programmes come from the US. In Egypt 54.5% of imported programmes are from the US. Of the rest of non-Arabic imported programmes France provides 13%, the UK, Japan and Germany provide 5 to 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 progs), followed by Egypt (6%), Saudi Arabia (4%) and Kuwait (4%).

In Africa about 40% of programmes are imported, though again there are quite wide differences. Of the imported material 50% comes from the US; 25% from Germany; and the rest from Western Europe. In South Africa 30% of programmes are imported, 54% from the US; 30% from UK; 9% from France; 5% from Austria; 3% from Canada.

In both Western and Eastern Europe, according to the Varis study, more than 40% of imported programmes originate within other countries in the region itself. In both regions the superpowers predominate: with the US providing 40% of W European and 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 Arabs, with one third of imports originating 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 various details because they seem to me to present a general picture of tv flows which is not a one way street, rather a number of main thoroughfares, with a series of not unimportant smaller roads. What is above all clear 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 picks up, that do not fit the familiarly simplistic model of the total domination of international television by the United States. Even at the simple level of just counting which programmes are going where, that idea simply is not true. There are alternative sets of influences and movement within Latin America, within Europe, within Asia, within the Gulf States, 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 on that most recent of televisual phenomenon, videocassettes, the patterns do not only support any thesis of the total domination of video software by US programming, though there does seem to be proportionately more of it than is the case for television 2.

At the end of 1983 there were an estimated 40 million vcrs in the world, with a growth rate much faster than that of 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 3. The penetration rate of vcrs in Saudi Arabia is about 85%, and in one study in 1981 which surveyed 120 people they all had vcrs and in a survey in the Red Sea City of Jidda, 19% had two machines 4.

There are basically two types of material available on videotape. In the first instance, there are large quantities of western tv programmes and feature films. At the time of Douglas Boyd's research, readily available were the latest episodes of Hill St. Blues, St. Elsewhere, The A Team, as well as such movies as ET, Terms of Endearment, etc. 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 Arab television programmes and films, particularly 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 that even when Egypt's political course is in disrepute, Egypt is still number one among the Arab states" 5. 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 important, 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" 6. 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."

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 tv service, a fact which is less than pleasing to the authorities. In 1982 the Information Minister, Adib Adam, expressed his fears that messages from the government were not reaching the people and that the loss of the tv audience to video might "hamper government efforts to disseminate national aspirations and values and channel information to the people." In a piece in the Star, a daily newspaper, on 21 June 1983, he 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 that one which is universal when an audience begins to flood away: the tv was boring. Equally in Indonesia the reaction to the impoverished character of the tv service has been to turn more and more to vcr: '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 vcrs including a good deal of US material.

Writing about video in Asia John Lent pointed out that in Singapore 45% of the population watch less television now, preferring video

cassettes', particularly Chinese language tapes for the predominantly Chinese population 7. What does worry the Singaporean authorities in particular are the uncensored western cassettes which are contrary to official guidelines on the portrayal of sex and violence, and the fact that people are reading less and watching more.

The fleeing from government dominated, worthy, development oriented tv to western dominated videocassettes nevertheless worries many Asian governments because of 'the frustration impact of Western-oriented video programmes pushing "modern and sophisticated" lifestyles upon kampung (village) peoples who do not have the means of acquiring the paraphernalia of those lifestyles' 8.

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 programmes. 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 9. By 1984 14.4% of households had vcrs, extensively used to watch programming banned on television, most notably from Japan, the US and Hong Kong. In similar vein the Saudi Arabian government was unable to stop the circulation within Saudi of the programme Death of a Princess, pirated copies of which were available within 24 hours of the programme being shown 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 a limited programming schedule means that there has been little programme 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 3000 to 5000 video distribution outlets, offering 4000 different foreign titles 10. There is also 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 however not wish to overstate this since the overwhelming use of vcrs remains for the viewing of movies not political tracts 11.

Consider also the example of India. 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 centres 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 video cassettes, and above all, the uninterrupted import of video cassette recorders has taken the Indian men and women, whether urban or rural, by storm. It has become a phenomenon without any parallel' 12. Agrawal's whole account pinpoints both the immediate and considerable implications for the film industry in India, as well as the continuing elitist basis to the actual

possession of video.

The basic fact of life, however, is that it remains extremely difficult to speak with any certainty of the patterns of distribution of programming on videocassettes. In the study which we have just 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 US product, in other areas much less so with considerable use of domestic product and non-US sources. In Latin and South America, for example, the rule which seems to apply is that the hardware comes largely from Japan, the software largely from the US. 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 centre for programming on video. Television Broadcasts International (TVBI) markets about 1000 hours of its 2-3000 hours of productions annually to 25 countries with Chinese populations. The programming tends to be serialized dramas, modern action programmes, kung fu, variety shows and comedies, produced in different languages, Mandarin, English, Thai, Vietnamese. Asia TV, based in Hong Kong, produces 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 around 2000 Indian films worldwide, as well as serving the needs of the local Indian population. In Taiwan, as another example, there are about 7500 video retail shops, with an average stock of 6000 tapes. These tapes can be categorised into 5 language groups: English (US), Japanese, Mandarin, Cantonese (Hong Kong) and Fukienese (local dialect). Far and away the most important of these being tapes from Japan, with a particular preference for Japanese detective series, love stories and modern family drama; followed by Chinese martial arts movies and American horror movies 13.

The major industrial societies use of video seems to involve a certain dependence on US product. In Australia for example 61% of video programming comes from the US; 16% from the UK; 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 US products. There is however another interesting aspect to 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 30000 titles and a membership of 5000 people. In another study, which the BRU is funding in Bradford in the north of England, we have found that the penetration of video in Gujerati homes is 74%, with an overwhelming tendency to use it to watch films from the sub-continent. There are apparently examples of some Asian women watching a hundred films a week. In Italy 39.7% of films on video are from Italy, 44.7% from the US. In Spain the pattern is similar: 30% US; 25% Spain; 16% Italy; 10% GB; 19% from other countries.

Finally, in this examination of the raw facts of the existing patterns of distribution of tv and video programming it is instructive

to look at the programme content of even those tv 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 picture is of the programme content is far more European than has perhaps been allowed.

Table 1
Programming on satellite services

(Source: Cable TV Authority: Annual Report/Accounts
1986/7)

| 13 WEEK SAMPLE (figures in hours) | EEC CONTENT AVERAGE | | 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 |

What is the point I am making by relating this mass of detail, which is I admit highly variable, about the existing patterns of distribution of tv, and to a lesser extent video. The point is a simple one: that the structure of distribution is far more complex than has often been allowed for; that one can see many nodal points for the future around which production has grown, principally in the major industrial societies other than the US, but also to an increasing extent in other societies, centres moreover which will simply not go away or readily wither under heat emanating from North America. Indeed centres which will become ever more aggressive, competitive 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 BBC, ZDF, ARD, but also the rapidly growing power and wealth of production houses in such diverse places as Egypt and Brazil, Hong Kong and Japan. In contemplating the future it is perhaps also useful to remember that television as a global institution is relatively new, the creation of the 1960's and 1970's, 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 pattern of consumption represents is not an American hegemony at all, if that is taken to mean a total domination, but a complex and evolving structure which has hidden within the central fact of television which is that on the whole national audiences and audiences defined by some singular demography, prefer their own.

Chalices

Of course it might be that whatever qualifications I am placing on

Table 2

No of households in Europe able to receive a given channel (Source: Cable and Satellite Europe 6:87)

| <u>EUTELSAT</u> | <u>Austria</u> | <u>Belgium</u> | <u>Denmark</u> | <u>Finland</u> | <u>France</u> | <u>Germany</u> | <u>Ireland</u> | <u>Luxbourg</u> | <u>Netherlands</u> | <u>Norway</u> | <u>Sweden</u> | <u>Switzerland</u> | <u>UK</u> | |
|-------------------|----------------|----------------|----------------|----------------|---------------|----------------|----------------|-----------------|--------------------|---------------|---------------|--------------------|-----------|--------|
| <u>1 F-1</u> | | | | | | | | | | | | | | |
| 3SAT | 310,000 | | | | | 2,075,000 | | | | | | 334,000 | | 2,719, |
| FILMNET | | 35,000 | | 5,000 | | | | | 60,000 | 3,000 | 3,000 | | | 106, |
| RAI | | 2,500,000 | | | | | | 50,000 | | | | 1,025,000 | | 3,575, |
| RTL-PLUS | 270,000 | 40,000 | | | | 2,046,000 | | 100,000 | | | | | | 2,456, |
| SAT 1 | 360,000 | | | | | 2,075,000 | | | | | | | | 2,435, |
| SKY | 293,708 | 963,420 | 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 | 9,112, |
| SUPER | 302,000 | 538,000 | 82,000 | 258,000 | 33,000 | 2,075,000 | 255,000 | 81,000 | 2,935,000 | 223,000 | 244,000 | 777,000 | 137,000 | 7,940, |
| CHANNEL | | | | | | | | | | | | | | |
| TELECLUB | | | | | | 700 | | | | | | | | |
| 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, |
| 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, |
| <u>EUTELSAT</u> | | | | | | | | | | | | | | |
| <u>1 F-2</u> | | | | | | | | | | | | | | |
| NRK | | | | | | | | | | 750,000 | | | | 750, |
| INTELSAT | | | | | | | | | | | | | | |
| 27.5 WEST | | | | | | | | | | | | | | |
| CHILDREN'S | | | | | | | | | | | | | | |
| CHANNEL | | | | | | | 225,000 | | | | | | | |
| CNN | | | | | 2,281 | | | | | | 1,500 | 100,000 | | 327, |
| ARTS | | | | | | | 40,000 | | 350,000 | | 141,956 | | | 144, |
| PREMIERE | | | | | | | | | | | 1,000 | 12,000 | | 403, |
| LIFESTYLE | | | | | | | | | | | | 40,000 | | 40, |
| SCREEN | | | | | | | 238,000 | | | | 1,250 | 86,804 | | 326, |
| SPORT | | | 1,000 | | | | 238,000 | | | | 1,5000 | 76,324 | | 316, |
| <u>INTELSAT</u> | | | | | | | | | | | | | | |
| <u>60 EAST</u> | | | | | | | | | | | | | | |
| BR 3 | | | | | | 1,569,000 | | | | | | | | 1,569, |
| KINS PLUS | | | | | | 2,075,000 | | | | | | | | 2,075, |
| EUREKA | | | | | | 1,533,000 | | | | | | | | 1,533, |
| MUSICBOX | | | | | | 2,075,000 | | | | | | | | 2,075, |
| WRD 3 | | | | | | 1,185,000 | | | | | | | | 1,185, |
| <u>TELECOM 1B</u> | | | | | | | | | | | | | | |
| CANAL J | | | | | 10,000 | | | | | | | | | 10, |
| LA CINQ | | | | | 10,000 | | | | | | | | | 10, |
| M6 | | | | | 10,000 | | | | | | | | | 10, |

contemporary patterns, there is enough evidence for someone to say that if only the new delivery systems are in place they can overwhelm all potential opposition. Well, let's have a look at the evidence, and here I need to draw in particular on evidence from Europe, where certainly there is no arguing with the sheer physical availability of new channels.

Table 2

No of households in Europe able to receive a given channel (source: Cable and Satellite Europe 6:87)

All very impressive, but the available objective evidence of the considerable and continuing losses incurred by cable and satellite services throughout Europe, point up to the difficulties of developing new television markets. Nevertheless, as Toby Syfret, head of new media for JWT, observed, "the feeling among advertisers is that one way or another satellite television is going to succeed commercially in Europe. The question is, how?"¹⁴ The optimism is born of occasional flashes of success, even if at the moment there are as rare as the flowering of cacti in the desert. Syfret points out that while programme budgets for satellite delivered programmes are small compared to those of the large terrestrial systems: "audience research data shows that they compete very successfully against national broadcasters in homes where they can be received. For instance Sat 1 and RTL Plus are on a par with ZDF (in Germany); Sky Channel does particularly well in Scandinavia and is the third most-viewed television in the Netherlands. The Children's Channel appears to do better than Breakfast TV (BBC) and TV AM (ITV) combined amongst all individuals in the UK, never mind its target audience of children. In short whatever problems there may be with satellite television in Europe, viewer demand and acceptability of foreign broadcasts do not count amongst them". The vital caveat is that these are figures drawn only from cabled homes, which remain in a tiny minority, and therefore provide a very uncertain basis on which to begin to make judgement. For example, in Germany, which Syfret cites, the average daily viewing in April this year 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 tv audience in key markets such as Europe, then objectively in terms of the amount of potential advertising revenue there is vast wealth to be tapped. Advertising on television within Europe is defined by three main zones:

- 1.those countries in Northern Europe where traditionally there has 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 where advertising is generally available such as Italy, Portugal, Spain, Greece, Ireland, UK.

It has been recently calculated that the total amount of current advertising within Europe is about \$6000 million, and that if tv advertising were to be "set free" in those countries within the first two zones the figure could be closer to \$8400 million¹⁵. According to research commissioned by Sky Channel from Saatchi and Saatchi expenditure on tv advertising in Europe will have risen 58% by 1990 from 4.7 billion dollars in 1985 (0.17% of GDP) to 7.4 billion dollars in 1990 (0.24% of GDP). Patrick Cox of Sky argues that the figure could be 0.3% of GDP ie. 12 billion dollars¹⁶. Cox's arguments assume 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: the wealth is there, all that is needed is to provide the correct programming strategy, let it be carried within the new distribution technologies and thus is provided the key to unlock the door to the treasury.

As I indicated at the very 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 at the heart of the package they will deliver will be US product. Certainly there are some interesting clues that such programming can be used occasionally to gather the treasure. In one particular instance new tv services, using considerable amounts of US material, have had a 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 private 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 thousand million lire in 1970 to 198 thousand million lire in 1983, a growth of over 500%. 370% of this growth occurred between 1976 and 1983. Total advertising expenditure in Italy increased from 266 thousand million in 1970 to 2666 thousand million 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 revenue¹⁷.

There is an interesting and salutary tale which can be told and which I think is relevant here. I am however led to conclude 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 wealth which in objective terms undoubtedly exists.

On the 3rd of August this year 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 stated simply, if a little obvious, '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 independent television companies. In March its joint Managing director Richard Hooper was still cooing optimistically about the future, about the

fruits that the new channel would offer and the kind of audience which would be picking them. He told a meeting 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 in seeking out the 25 year old to 45 year old upwardly mobile family audience we believe that wall-to-wall blandness is marketing strategy". 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 UK 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 we had been telling ourselves for years was the best tv system in the world.

The experience, however, 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 had in fact lost something like £5.69 million in the year prior to the start of Superchannel, and the Swedish owned channel Filmnet had lost £8 million in the first 9 months of last year.

The picture presented to the crisis meeting in August, however was of a channel which while it could now be received in more than 8 million homes, in 15 countries, with an average audience of 1 million, remained one which was simply not generating enough advertising revenue. The roots of the crisis, were varied. 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 next year are £21 million, up £2 million on the previous year. The revenue from advertising is 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 ever would be sufficient market for satellite delivered services, which had led to the crisis meeting of SC's board. Their response was to cut costs, shed staff and to completely reappraise the programming strategy with the aim of introducing more mass appeal programmes into peaktime. There are those in the industry who remain less than convinced that the channel will see another summer.

Much of the analysis of SC's problems pointed to the institutional trip-wires being placed in front of it - whether by European governments, European cable operators, the trade unions - as being the real basis for its possible, and now perhaps likely, fall. Certainly, these were real problems which should not be underestimated. 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 position as it is today.

The Channel and its backers were in fact using an expensive means of throwing a uniform programme schedule at audiences whose singular characteristic was that they were different in their needs and expectations, moods and manners, histories and cultures.

The ambitions behind Superchannel are by now fairly commonplace, the widespread assumption that in the satellite and cable fields new markets are there to be developed on the wave of the future, deregulated,

non-public service television. What is becoming very clear is that the missionaries of the new age have, in fact, had little grasp of the social dynamics of the European tv audience even though quite clearly such understanding was the necessary design stage to 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 problem which they face lies, since it is quite clear that the structural weakness of pan-European television is the logical assumption it must make about their being a pan-European audience, rather than audiences. SC'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 programmes and hey presto you have yourself an income. What this did not allow for was the fact that it grossly overemphasised social commonalities, underestimated the forces of national cultures acting as powerful definers of national cultural taste (even among yuppies), and ignored the fact that not all those yuppies resided at the end of a cable system. It is an error, not unique to SC, 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 rather than with the more prosaic, but as important sociology of reception.

The fact of the matter is that there is no decent, comprehensive and comparative, empirically and conceptually adequate model of the tv markets of the future. In fact clues do exist, scattered around, which provide some insight into the likelihood of imported television being successful, or even acceptable, and into answering that mysterious question of what the audience of the future will require for its enlightenment and pleasure.

To explain why I am saying this and in effect placing a question mark against the assumptions which underlie this conference, I need to take you into the nitty gritty of how television audiences already make their decisions, and to examine some of the reasons why they make those decisions.

Choices

The whole debate about international television, whether that debate is taking place inside the boardrooms of multinational corporations, market research companies or the conspiratorial mind of the academic left, tends to be loaded with sets of assumptions about cultural influences, about meanings and the shaping of consciousness, even about the sheer amounts of tv 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 tv societies. I must agree with this observation by the late Ithiel de Sola Pool: "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."18

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, the very essence of what we are here today to discuss. 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, identifying Dallas as a threat to the national culture of France called for a crusade "against financial and intellectual imperialisms that no longer grabs territory, or rarely, but grabs consciousness, ways of thinking, ways of living"19.

Personally I have long thought that the greatest threat to French culture were Frenchmen, but let that go. Lang's words are surely familiar. What has been almost totally ignored however in the debate around Dallas has been the relationship between the programme and the various audiences who for whatever reasons, in whatever circumstances, with whatever consequences, actually sit down and watch it. Any exploration at that level, no matter how cursory, provides some important qualifications to the idea of its dominant influence. For example, one discovers that in most countries Dallas is not as popular as home produced soaps, and 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 tv programme output. In Britain from whence came the "wall to wall" phrase, with the solitary exception of the "who shot JR episode", the programme never came anywhere near competing with such long standing popular dramas as Coronation St and Crossroads. In Japan, Dallas was introduced in October 1981, went to a 10% share, and then to a 3% share by December. This is compared, for example, to the popularity of Oshin, a locally produced, 6 days a week, 15 minute serial drama of a woman triumphing over hardship, with an audience share of 57%, once recording the highest share ever in the history of Japanese tv, at 63% 20. In explaining the difference the Cantors make an extremely interesting observation: "In contrast to Oshin, the suspense in Dallas arises from greed, self-interest, lying and manipulation - behaviour that might be considered objectionable and shameful in a culture that prizes loyalty, self-sacrifice and honouring 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" 21. In New Zealand for example, other kinds of imported programming from other countries are more popular than Dallas and its ilk 22.

It is in fact simply untrue to say that imported television programmes, from the US or other metropolitan countries, always have a dominant presence within the indigenous television culture. Certainly they do not always attract larger audiences than home made programmes, 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 5.30pm and 11pm 84% of

the channel's programmes are in-house productions. In August 1983 for example, the top ten programmes were all Globo productions, including three telenovellas. As Richard Paterson points out, in Brazil one sees: "a television devoted to national culture. TV Globo has fully utilised 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."²³. In fact, TV Globo now produces more programmes than any other station in the world, reaching 99.97% of tv households in Brazil. In 1986 it had the most popular telenovela ever, Rogue Santeriro (Rogue the Saint) which at times had a 90% share of the audience. Globo exports to more than 100 countries, including China, USSR and GDR. Its production Isaura, the Slave Girl was something of an international success. Other networks in Brazil are beginning to compete with Globo with their own productions, such as TV Manchete and TV Bandeirantes. Dallas, by the way, in 1982 occupied 69th position in the Brazilian ratings, and 109th in Mexico. Elsewhere in Latin America there is much US product to be found, but one also finds the ubiquitous telenovelas which are, according to one recent account "a fixed and schedule topping feature"²⁴. In central America one new angle on US influence is the growing take-up of the Hispanic SIN-TV network, with its programmes Noticiero SIN and Mundo Latino being 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 US imports and Latin American telenovelas. In Mexico the popular channel, Channel 2 consists of family entertainment, sport, news and hours each day of local telenovelas. In Colombia with 3 tv networks a "significant proportion of tv content is produced locally"²⁵. An analysis of programmes during one week on the two commercial channels found 54% of programming produced domestically. Of the 46% of imported television, 14.6% were soaps operas from Brazil, Mexico and Venezuela; 18.7% children's programmes from Latin America and the US. Prime time was dominated by national soap operas such as Tuyo es mi Corazon and Amandote. In Venezuela 55% of programming is domestic, and while US and Brazilian soaps are popular "they do not compete for the prime time spots filled by local productions such as Cristal and Los Donatti"²⁶. Both of these have, in fact, been exported to countries throughout the region and the US. In 1985 in Miami Cristal had a higher audience share than Dynasty. In Ecuador 65% of programming is imported from Latin America and the US. In Paraguay imports from the US amount for 70% of programmes, whereas in Peru the government has demanded 60% of domestic production. At the present time 75% of programmes are imported, of which 46% is from the US; 35% produced television is, however, remarkable, however in light of the fact that 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 vernacular services on TV2 and TV3. In December 1983, however, 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 has been the success that President Mpepha of the tiny republic of Venda has now

announced that he wants his own television service, Radio Television Thohoyandau. In Kenya the most popular programmes are locally produced programmes such as Vitimbi in Kiswahili and social dramas such as Fedheha.

In Singapore where the government's Singapore Broadcasting Corporation runs three channels, broadcasting in English, Mandarin, Tamil and Malay, and where 60% of the programmes are English language the bulk of which are imported, Chinese programmes, particularly from Hong Kong, are consistently the most popular. The Malaysian station TV3 has proved to be particularly successful by transmitting in Cantonese for the Chinese population in Malaysia and Singapore. In Thailand the most popular programmes 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"²⁷. Japanese tv has also proved 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 not only imports 65% of its total output, and where the BBC and ITV are readily available to most of the population, the most popular programmes for many years have been The Late, Late Show on Saturdays, hosted by Gay Byrne, followed by the home produced drama series The Riordans, Bracken and Glenroe. In countries such as New Zealand and Sweden, where there are enormous problems facing the local broadcasting services which necessitate the importation of foreign television, home grown programmes nevertheless compete in terms of popularity. In New Zealand in fact that there is evidence that the bulk of the population actively dislike the American tv they see on their screens²⁸. In Zimbabwe in 1982 locally produced programmes 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-Shahilya [a series on art and literature] and Jalsa [a programme on classical music]. Dallas, Charlie's Angels and Chips are cheaper for BTV to transmit than any local dramas - but local productions challenge them in a way few outsiders would believe possible."²⁹

And so one could go on. This is not to say that imported programmes are not to an extent an important part of the total structure of many countries' broadcasting, nor indeed that in some cases they are not very popular. It is merely to observe that even a limited glance at the available evidence - which is extremely thin on the ground - about the most simple facts of viewing, indicates that the picture of 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 programmes.

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 programme forms. The classic example of a major European station setting out to produce a European Dallas was ZDF's production of Schwardzwaldklinik, (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 characterise successful American television the kind of tv which maybe the new 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 programme links its success not to its apparent transnational ingredients, but to the creative genre of "Heimatfilm ie 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", for a sense of place and home, for a personal, concrete environment is deeply embedded in the phenomenon which Elias Canetti called the German symbol for the mass of people: the forest as the archetypical 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 Gemeinschaft ie between society and community" 30. Hoffman points to the way in which the central, archetypical images of a culture are carried within an oral tradition and then sealed within the physical artefacts of the print and visual media, with the economics of production ensuring that the images so captured were true ones which had the most apparent resonance with popular consciousness.¹² There is a very plausible thesis that the roots of such successful programming as Schwarzwaldklinik border on the antique. The fact of the matter is that when the gloves are really off in the emerging collision between national and transnational tv forces, that basic observation will be of far more than academic interest.

The real clue as to what European audience prefer is rather simple to portray: Table 3 is a list of the top 20 programmes in France, Germany and Britain in April this year:

Table 3

Top 20 France

| | | DAY | PM | % | |
|---|--|------|--------|-------|------|
| 1 | LA FEMME DE MON POTE Comedy 1st broadcast in 86. | FILM | TF1 5 | 20.31 | 38,8 |
| 2 | LE GENDARME SE MARIE Comedy previous broadcast in 81. | FILM | TF1 12 | 20.38 | 36,7 |
| 3 | LOTO SPORTIF | | TF1 13 | 20.32 | 36,2 |
| 4 | SUBWAY Comedy drama 1st broadcast in 86. | FILM | TF1 13 | 20.42 | 33,2 |
| 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 Thriller. | FILM | A2 | 21 | 20.35 | 31,6 |
| 8 | 100 000 DOLLARS AU SOLEIL Aventure comedy. | FILM | TF1 | 26 | 20.36 | 31,3 |
| 9 | LE TOMBEUR Comedy. | THEATRE | A2 | 29 | 20.33 | 30,7 |
| 10 | LOTO SPORTIF | | TF1 | 6 | 20.31 | 30,2 |
| 11 | LE CHEMIN DES ECOLIERS Comedy Drama previous broadcast in 80. | FILM | TF1 | 6 | 20.40 | 29,7 |
| 12 | GRAND PUBLIC: SIM A live variety show based on entertainment star. | SHOW | TF1 | 24 | 20.33 | 28,7 |
| 13 | TIRAGE DU LOTO | | TF1 | 1 | 20.33 | 28 |
| 14 | FOOTBALL: FRANCE-ISLANDE | | TF1 | 29 | 19.55 | 27,8 |
| 15 | CHAMPS-ELYSEES Every Saturday night, well established show. | SHOW | A2 | 25 | 20.32 | 26,2 |
| 16 | LA GRANDE EVASION Adventure | FILM | TF1 | 19 | 20.39 | 26 |
| 17 | GRAND PUBLIC: S. STALLONE | SHOW | TF1 | 3 | 20.37 | 25 |
| 18 | L'HEURE SIMENON A new series of adaptations of Georges Simenon. | TV FILM | TF1 | 1 | 20.40 | 24,8 |
| 19 | UN ELEPH CA TROMPE ENORM Comedy | FILM | A2 | 14 | 20.33 | 24,4 |
| 20 | NOUS IRONS TOUS AU PARADIS Comedy | FILM | A2 | 28 | 20.32 | 24,3 |

Top 20 UK

| | | | | | | |
|---|--|-----------|------|---|-------|-----------|
| 1 | EASTENDERS Twice weekly with rebroadcast | UK SERIAL | BBC1 | | 19.30 | 36,7/47,6 |
| 2 | CORONATION STREET Produced by Granada, on air since 1960, twice weekly. | UK SERIAL | ITV | | 19.30 | 24,8/32,2 |
| 3 | LIVE FROM THE PALLADIUM One from a series of shows broadcasting during six weeks. | SHOW | ITV | 5 | 19.45 | 29,7 |
| 4 | DON'T WAIT UP Comedy series. | SERIES | BBC1 | 6 | 20.30 | 29,4 |

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| | | | | |
|-------------|---|-----------|---------------|------|
| 5 | EVER DECREASING CIRCLES Comedy show | SHOW | BBC1 13 20.30 | 28,5 |
| 6 | LIVE FROM THE PALLADIUM | SHOW | ITV 12 19.45 | 27,4 |
| 7 | BERGERAC Detective serial | UK SERIAL | BBC1 4 20.35 | 26,8 |
| 8 | JUST GOOD FRIENDS Comedy serial | SERIAL | BBC1 12 21.25 | 26,3 |
| 9 | BOB SAYS OPPORTUNITY KNOCKS | SHOW | BBC1 4 19.50 | 26 |
| 10 | THIS IS YOUR LIFE Based on the life of a entertainment star. | SHOW | ITV 8 21 | 25,9 |
| 11 | WORLD CHAMPION | BOXING | BBC1 18 21.50 | 25,6 |
| 12 | ONLY FOOLS AND HORSES Comedy show broadcast on Christmas. | SERIES | BBC1 12 21.25 | 25,4 |
| 13 | BERGERAC | | BBC1 11 20.35 | 25,3 |
| 14 | CLIVE JAMES ON TV Comedy Show | SHOW | ITV 5 22 | 25,2 |
| 15 | THE MIRROR CRACK'D Thriller | FILM | BBC1 18 19.45 | 25.1 |
| 16 | BOB SAYS OPPORTUNITY KNOCKS | SHOW | BBC1 11 19.40 | 25 |
| 17 | NEWS, SPORT AND WEATHER | | BBC1 18 21.35 | 24,9 |
| 18 | THIS IS YOUR LIFE | SHOW | ITV 1 19 | 24,2 |
| 19 | ONE BY ONE | UK SERIES | BBC1 4 19.05 | 24 |
| 20 | CLIVE JAMES ON TV | SHOW | ITV 19 21 | 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 CLAN DYNASTIE | US SERIAL | ZDF | 15 21 | 25,7 |
| 20 | DIE WILSHEIMER | WG SERIAL | ARD | 13 20.17 | 24,3 |

What I am suggesting then is that one has to come at 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, rather how it does or does not tap into and feed off the rythms, moods and

moralties that are already present. The case which Hoffman makes, could easily be echoed in Britain, for example, where the most powerful television, certainly in the field of drama, have been the hugely successful and long running Coronation St, more recently Eastenders, and a long tradition of single drama. No American programming, not even Dallas, has come close to competing in popularity and critical success with these programmes. And in this, I am suggesting, Britain is far from unique.

Or consider rather more obvious and simple examples of the kinds of preferences made by European audiences at least:

The simple but obvious and significant feature of these tables is just how little imported television, including US programming, there is. There are 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 advertising supported MTV, but two-thirds of all viewing time is of programmes from the public service YLE. In the year 1981/2 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 US; 19.6% from Great Britain 11.3% from Sweden. The rest of the foreign television came from 26 other countries; and from Eurovision, Intervision, Nordvision; and from coproductions. Another interesting fact of Finnish tv life is that TV3 (OKA) - jointly set up by YLE, MTV and the electronics company Nokia, which was given the go ahead by the Finnish government in May 1986 and started broadcasting in January 1987, is watched by more people in the Helsinki area - the only place it is currently available - than all satellite and cable channels put together (15). In Portugal RTP produces 60% of its own programming. Last year the top programme 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.

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 socio-cultural 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 US tv. And when we do experience how choices have been made about programming on terrestrial systems, the preference is clear.

What however then of the kind of choices which people make in multi-channel environments? Is there evidence here which will provide a clue to the question of whether the future of television lies with imported tv from rich societies, and in particular the United States.

In a detailed, empirical study Dent, Winkfield and Lloyd looked at the use of television in a multi-channel environment.⁷ The countries studied were Netherlands, Belgium, Switzerland, FRG, and the sample was drawn exclusively from cabled households. Theoretically the number of channels available at the time of the study (late 1986) were: FRG 3 domestic, 15 other terrestrial, 8 satellite/cable, a total of 26; Netherlands 2 domestic, 15 other terrestrial, 4 satellite/cable, a total of 21; Belgium 5 domestic, 16 other terrestrial, 5 satellite/cable, a total of 13; Switzerland 3 domestic, 10 other terrestrial, 9 satellite/cable, a total of 22. In an earlier study in

November 1984 they had calculated the average amount of viewing in cabled homes in the four countries, and then in March 1986 recalculated:

Table 4Average Hours TV watched perweek

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

Table 5VIEWING BEHAVIOURLoyalty to Channels (4 weeks)

| | Belgium | Germany | Netherlands | Switzerland |
|--------------------------|---------|---------|-------------|-------------|
| Total available Channels | 23 | 22 | 23 | 19 |
| <u>% WATCHING</u> | | | | |
| 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 |

Allowing for the differences in the sample base it is clear the amount of viewing in cable homes has increased. The most interesting part of their research is where they looked at viewer loyalty to channels - 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 within cabled homes, there still tends to be a preponderance of viewing of 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% of viewing in cabled homes, compared to 15.2% for SAT 1, 9.8% for Musicbox, 9.7% RTL Plus, 5.6% Sky, 2.6% 3 Sat, 11.1% other channels. Their main conclusion 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 tv 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". They 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".

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

In Britain there is some research on viewing patterns within cabled homes which seems to confirm the general thrust of this analysis. There are in Britain 1,190,000 homes passed by cable, and 193,173 homes subscribing to cable programme services, as of July 1987 33. Cable households in the UK tend to be larger (3.56 people), are more likely to have a video (50%), more than one tv (54%), spend more time watching tv (5.6hrs 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 programmes as opposed to broadcast television, up 7% from the previous year. Particularly interesting, though given the social composition not surprising, was the fact that there was considerably more viewing of cable than there was of Channel Four or BBC2, the 'minority' channels within the public service system 34.

The most recent evidence I can find about viewing in cabled homes, of services which might reasonably be expected to contain largely entertainment from wasp societies, is that undertaken by the Pan-European Television Audience Research 35. This was conducted in 12 countries, involving 10000 viewing diaries placed in selected homes. The survey focussed 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 edition of Media International Charles Dawson of Young and Rubicam, presented some of the results.

Satellite share of weekly viewing hours

| | <u>Scandinavia</u> | <u>Belgium</u> | <u>Germany</u> | <u>Netherlands</u> | <u>Switzerland</u> |
|---------------------------|--------------------|----------------|----------------|--------------------|--------------------|
| <u>Domestic Channels</u> | 73 | 23 | 64 | 83 | 46 |
| <u>Satellite Channels</u> | | | | | |
| Sky | 20 | 1 | 2 | 6 | 2 |
| Superchannel 7 | | - | 1 | 2 | 1 |
| TV5 | | 1 | | | |
| RAI1 | | 1 | | | 4 |
| 3 Sat | | | 1 | | |
| 1 Plus | | | 2 | | |
| Musicbox | | | 2 | | |
| Teleclub | | | | | 1 |
| RTL Plus | | | 13 | | |
| Sat 1 | | | 14 | | |
| <u>Spill-in Channels</u> | | | | | |
| ie other | | | | | |
| terrestrial | | 69 | 1 | 9 | 46 |

(Source: Petar/Dawson Media International Sept 1987)

It is important to remember that these figures are for viewing in cabled homes all tv homes, and what Mr Dawson, or Petar, or someone forgot to mention was the figure for the percentage of tv homes on cable systems, and yet that figure is crucial in judging the worth of the conclusions being drawn.

Table 7

Cabled Homes in Europe - the Petar sample.
(Source: cable and Satellite Europe. 4:87)

| | <u>Scandinavia</u> (Norway, Sweden, Denmark) | <u>Belgium</u> | <u>Germany</u> | <u>Netherlands</u> | <u>Switzerland</u> |
|-----------------|--|----------------|----------------|--------------------|--------------------|
| Households | 7.25m | 3.72m | 25.3m | 5.5m | 2.5m |
| Homes Connected | 1.79m | 3.1m | 2.3m | 3.1m | 1.4m |

| | | | | | |
|-------------|-------|-----|----|-----|-----|
| Penetration | 24.7% | 83% | 9% | 56% | 56% |
|-------------|-------|-----|----|-----|-----|

In Belgium, the Netherlands and Switzerland ie the countries with 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 is growing that, when offered an increased choice of channel, European viewers vigorously exercise that choice". They might be 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 at 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. For example, in Britain about 10%, and an even tinnier minority of all homes ie. a ratio of about 1:160. It is for this reason that a study by Wim Bekkers 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 multi-channel environment, a much more useful sample base for any examination in the long term strategic question in the development of new tv markets 36.

Bekkers rehearses the argument of the expansion of the amount of domestic, other terrestrial and satellite delivered services to establish the admittedly incontestable argument that the amount of television available has increased dramatically in recent years and is continuing to do so. For example, the number of foreign stations available somewhere 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 joint satellite dishes. The average tv home in the Netherlands can receive 6 foreign channels, and 30% of homes have a video (as of 1986). Another factor which might make the country a particularly favourable market for new channels is that 80% of the Dutch speak German well or reasonably well, and 75% speak English modestly 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 - is that "whatever is made in the Netherlands is always very popular: Dutch products always draw more viewers than similar products from abroad". In the 1970's when German and Belgium tv were available interest in them was in the region of no more than 1 - 4%. Nevertheless, by the 1980's the Netherlands were awash with potential choice for the viewer. Bekkers research reveals a fascinating picture of considerable resistance among the Dutch public to exercising such choice. In 1980 89% of tv viewing went to the domestic channels, and 11% to foreign stations. He then looked at the patterns of viewing within the Sky Channel reception area:

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 called "Euro pudding", but in the reconstruction of national markets currently and traditionally dominated by public service broadcasting organizations. The fact remains therefore that even if the problem of reception is solved, for example by the creation of extensive broad band cable networks or the ready availability of satellite dishes, the latter being more likely than the former, the new television services would still have to produce programmes of a quality, range and national character on a continuing basis and at enormous expense if that status quo is to be broken and new markets created. It therefore 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, not resolve. If in the first instance the new marketeers are marching down a road laden solely or even predominantly with US product, they are marching to oblivion.

I am not saying that US tv product will not be used by most tv systems, nor indeed that in some instances there will not be a good deal of such programming, nor even that some of it will not be successful. I am saying that alone it simply could not last the course, especially if the new markets are to be created through the use of enormously expensive delivery systems of cable and satellite. The really powerful productive forces within television are and will continue to be national. Where it is used US 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 the 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 US 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 US product will be through the recreation of the individual global tv markets on the back of the development of satellite and cable technologies. It could be of course that the proliferation will take place through the transformation of the existing terrestrial television systems as the shift and manoeuvre in response to the challenges of that cliché the third age of broadcasting.

The Old Ones

In examining the potential for new markets to be created, one needs to allow for the activities of those who already dominate the tv markets of many parts of the world, and certainly of the major industrial societies. The whole development of television within Europe, for

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 | 2 |
| ARD | 3 | 3 |
| ZDF | 3 | 2 |
| | <hr/> | <hr/> |
| | 22 | 16 |
| Nederland 1 | 55 | 59 |
| Nederland 2 | 24 | 25 |
| | <hr/> | <hr/> |
| | 78 | 84 |

In addition Bekkers points out that the amount of viewing is indeed increasing as the total amount of tv increases, but that the extra viewing is going not to the new channels, rather to the traditional domestic channels:

Table 9

March 1985: ave daily viewing = 129 mins @ 105m Ned 1 and 2; 24 others;
 March 1986: ave daily viewing = 140 mins @ 119m Ned 1 and 2; 21 others.

The strength of Bekker's point is that it challenges one of the central myths of world television: that new services offering bought-in television, particularly from the United States, is 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, 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 qualification 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 programme schedules able seriously to dent that disposition to cast the eye inwards rather than outwards.

While it is true therefore objectively that in fiscal terms potential growth in advertising revenue is there, it is equally true that such potential is national rather than transnational. Syfret, writing from within the very different world of a major advertising organization nevertheless nods in the direction of 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

example, has been based on the principle of public service broadcasting. In examining the future of tv markets, and particularly in assessing the likely success of services established outside that tradition, one should not underestimate the strength of those public service tradition, the power of the expectations which it has created among national audiences, nor the ability of public service institutions to fight their corner. I am not suggesting that these institutions are invincible, nor indeed that they are not capable of supreme acts of folly, and of strategic and tactical error. I am merely emphasising that historically their power has flown from their being deeply embedded in national soil. In 1986 the BRU published the results of its own research into what the British public wanted for the future of television. The context was the campaign then under way 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 adverts only 29% said they would still accept them if it meant less choice of programmes, representing only 16% of the total audience for television. However 75% of those wanting adverts on the BBC still wanted them if it meant that while the total range of programming available was reduced they had more of their favourite programmes, representing 40% of the potential audience. What people would object to is greater scheduling of American programming: 65% of those who favoured 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-lower licencefee-more US tv, amount to only 14% of the population. While I do not want to go through the whole of the results, that pattern of the British tv audience being extremely wary of anything which changed or affected adversely the kind of public service television to which they had become used, repeated itself across the whole of the research.

It would be wrong however to place too much emphasis on the protective significance of public attitudes. Public broadcasters however possess another immediate advantage even as they appear to be under siege, their budgetary advantage over all new services. In Britain, for example, the annual programme budget for BSB, the new DBS service will be £100 million. The joint revenue of the BBC and the ITV companies at that point will be between £2 and 3 billion. In Germany the operating budget for SAT1 is about \$75 million and for RTL Plus \$35 million, again contrasting with the hundreds of millions of ~~Dms~~ at the disposal of ARD and ZDF.

Basic wealth may of course not be everything, but in the words of Michael Caine in a recent (British) documentary "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 tv 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 children's programmes - anticipates precisely the kind of programming which the new tv 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"40 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 ratings, there will be no minority and high quality news and information 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 programme strategies. A simple index of which is the increase in the number of movies shown on the two systems from, 437 in 1980, to 660 in 1984. Recently ARD spent Dm460 million on 2700 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" 41.

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 tv. The research department of NRK, 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" 42. 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 public service 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, the RAI President, 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 call he echoed a few days later when he called for cooperation between public and private television to develop db services with an Italian flavour 43. In Spain while in April the Council of Ministers gave the go-ahead for 3 independent tv channels, they insisted that each should carry at least 40% of domestic production. In another interesting development it was decided in May that Spanish TV's TVE2 studio in Barcelona will opt out from the state

network for 3 hours a day from Monday to Friday and offer programmes in Catalan, including language course, children and young people's programmes, quiz shows and new s programmes.

In other instances the existing large terrestrial systems are being privatised, set in competition with the remaining public service institutions and effectively carving up the television markets before the new services have sufficient time to develop. France is one such example of this. In Britain there is also much talk of the government using spectrum fees for the allocation of the franchises for the commercial, ITV system, and of its 'privatising' Channel Four. In France earlier this year the government privatised TF1, the main national channel, in the midst of a string of developments of new tv channels, leaving in the public sector only Antenne 2 and FR3, both admittedly under siege. In June in an effort to further nurture the newly privatised TF1 the Prime Minister Mr Chirac, announced that he felt it only right that only the private sector should be allowed to carry advertising revenue. TF1 is already expected this year to take about 50% of the 7.6 billion francs which will be spent on tv 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 fulfil 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 not because the institutions as such will be destroyed by new competition but because they will successfully fight off the competitors but in so doing will change their own nature into something which is alien 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 evacuate the vigour from those national systems and replace them with a domestically produced television which is all together 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 tv product.

It is however not just the broadcasters of the major industrial societies who are responding. In New Zealand for example the English born Director General, Julian Mounter, has increasingly encouraged the production of programmes 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'" (James Duncan, I F and TV Guide 1987). It is important to emphasis that this policy is not born outside of any grasp of the real problems which will be faced in seeking to realise 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 increasing numbers of agreements to coproduce and exchange programmes. For example in February at the 10th Panafrica Cinema Festival of Ouagadougua in Burkina Fasso a number of countries agreed to set up the exchange of programmes, including Benin, Burkina Faso, Guinea, Mali, Niger, Senegal, Togo, Tunisia, Zaire. In May Egypt and Madagascar agreed to exchange radio and tv programmes. Staws in the wind or meaningless acts? It is at this stage almost impossible to know, though one does need to remember that all these countries are relative newcomers to the tv scene and it could just be that we are witnessing in these tiny little events and agreements is the laying 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 Auastralian producers would end up making mid-Pacific product, but now there is a real concentration on legitimate Australian production for the international market "45

Conclusion

I do not want to linger over these concluding thoughts, since they have been fairly explicit throughout the whole paper. It does seem tom me however important to make the point that it is extraordinary given the amounts of maoney 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 grasp the minima as well as the maxima of television audiences. One of the more important developments in European communications research is the growth of ethnographic studies of tv audiences, seeing them as richly complex individuals rather than abstract statistics with skins. It is a development to be wholly welcomed.

A few final thoughts:

there has been a widespread belief that US television has traditionally been ubiquitous and popular: not so true.

there is a conviction that the new distribution technologies will readily pour their wares over the populations of the world: not true.

there is a belief that thr production of tv product will become concentrated in a small number of centres, particularly in the United States: not true.

there is an assumption that national governments and broadcasters will wimpishly collapse before the might of the transnational cultural industries: not true.

there are assumptions that international tv product is the cultural avenue to the global village, whatever that is: not true.

The reality is that US tv was never as popular, or even widespread as was assumed; that national populations basically prefer national programming; that the new distribution technologies are in for a very rough ride; that 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 colours.

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