

Trends in Global Traffic of  
Television Programs

by Tapio Varis

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**TRENDS IN THE GLOBAL TRAFFIC OF TELEVISION PROGRAMMES**

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

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

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

Although international communication and world television can be discussed as a global problem now reaching an audience of more than one billion viewers, the transmitters and receivers world-wide are strongly concentrated in a few regional centres. To be more precise, almost half of the world television audience is in the United States and the Soviet Union. Among the 10 largest TV audiences, covering three-fourths of the world television audience, there is only one country from the developing world: Brazil. The basic global flow of television programming is among eight rich countries (United States, United Kingdom, Canada, Japan, Australia, Germany, France, and Brazil) which have most of the receivers and the largest audiences.

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

Among all other nations of the world the United States is a particular case in international television program flow because:

- there is a major domestic market for television programs in the United States without equal in any other country;
- the US producers and companies are the largest program exporters in the world; and,

- in relation to total output, US television networks import fewer foreign programs than any other country and one might claim that foreign programs are not shown at all in the United States.

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

The Soviet television also has some characteristics that deserve special attention:

- Soviet Television is multinational in character. In addition to the two all-union networks, 120 regional or local stations are in operation, broadcasting programs in most of the languages of peoples living in the country;
- the present data are from the two national networks broadcasting in Russian. Only programs that have been imported from outside the Soviet Union are classified here as foreign.

When compared to the 1973 study, the total share of imported programs has increased from 5% to 8%, and to 18% in prime time while that of the US television has remained about the same. Approximately one-third of the foreign programs originate in eastern european socialist countries programs. There are also co-productions with other countries.

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

Approximately one-third of western European programs are imported. Here the category "imported" refers to programs from other regions. In Britain, for example, where the IBA strictly limits material from countries other than Britain, programs from other EEC countries are not classified as foreign. There are special rules for programs from other Commonwealth countries, too. In the present study, however, all imported programs are classified as foreign.

The bulk of imported programs in western Europe originates in the United States. More than 10% of the total western European broadcasting time is made up of American programs. Other major sources are the United Kingdom, the Federal Republic of Germany and France. Of all the imported materials,

American programs make up almost half (44%). When compared with the 1973 figures, the United States share has slightly decreased, although it may now be stronger in the private and cable systems not included in the present analysis. Eastern Europe, including the USSR, provides approximately 3% of western European imported materials. They were shown in a few countries only, mainly in France, the Federal Republic of Germany, England, Finland and the Basque television in Spain. There are no changes in imports from eastern Europe when compared to the situation 10 years earlier. In general, imported programs were mainly entertainment, but there are notable differences between individual European countries.

The figures for the eastern European region, excluding the Soviet Union show that the share of imported programs in the eastern European region has increased during the ten-year period with the exception of Bulgaria which, however, has been explained as being a statistical chance. The share of imported programs in eastern Europe is approximately the same as in western Europe, approximately one-third. The sources, however, seem to be more diversified. For example, the Soviet programs do not have in western Europe. Only 6% of eastern European broadcasting time is made up of Soviet programs whereas, for example, 12% are from western Europe and another 6% from other eastern European countries.

Of the total imports, Soviet programs make up approximately one-quarter, whereas almost half originate in western Europe. Imported programs appear in several categories, mainly in entertainment, children's whereas almost half originate in western Europe. Imported programs appear in several categories, mainly in entertainment, children's programs and cultural and educational programs.

The data for Canada are not included in figures of western Europe, although Canada is taking part in the European process of security and cooperation. Neither are they included in the United States figures, although due to the geographical location of the country, the availability of American broadcasting is significant. Research data from the Montreal area, which is regarded as representative area for most of the country, confirm that the United States accounts for the vast majority of imported programming, on private and public, French and English networks, except in the case of the educational network, Radio Québec. Approximately 40% of the programs are imported and almost a third of the total output is made up of United States programming. As much as 70% of all imported programs originate in the United States, the rest coming mainly from France, the United Kingdom, Italy and elsewhere. The movie and entertainment categories comprise the highest proportion of imports.

The Latin American region is represented in the present study by Argentina, Brazil, Cuba, Ecuador, Mexico and Venezuela. The amount of imported programme material varies from one fourth (Cuba) to two thirds of total time of

programming (Ecuador). On average, approximately a half of the programmes broadcast in the region are imported. During prime time, the share of imported programmes is higher than in the total time of transmission in Latin America.

The entertainmet category is predominant in all Latin American countries analyzed in this study: approximately half of the total transmission time is devoted to entertainment, with the exception of Cuba where the figure is one third. Most of the imported material appear foreign programmes in the Latin American countries are the following: the United States (together with production by the multinational corporations) dominate with three quarters of the imported material. Programmes from Latin American countries themselves make up 12 per cent of the imported material. Western European programmes represent a few per cent of the total of imported materials. There are considerable differences among the individual countries of the Latin American region. In **Argentina**, 38 television channels were studied. Four of these were located in the Federal capital and 24 in the provinces. Of the imported programmes, 73 per cent came directly from the United States and another 16 percent were multinational in character. In 1973, the percentage of American imports was estimated to be 75 per cent. Mexico was the origin of less than 10 per cent. Western European imports, which in 1973 were 5-6 per cent, accounted in 1983 for approximately 2 per cent of the imported total.

In **Brazil**, six television channels were analyzed. Of the imported programmes, 93 per cent came from the United States. Mexico produced 2 per cent came from the United States. Mexico produced 2 per cent and the rest were mainly from Western Europe. In **Cuba**, two channels were analyzed. The Soviet Union was the origin of 23 per cent of the imported material, the United States had almost an equal share (22 per cent), the German Democratic Republic 13 per cent, other Socialist countries 8 per cent, Western European countries 20 per cent, and other countries 11 per cent.

The data for **Ecuador** are based on material from nine television channels. The imported programmes orginated in the United States (55 per cent), Mexico (23 per cent), other Latin American countries (15 per cent), Western Europe (5 per cent), and other countries (2 per cent).

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

The region of Asia and the Pacific includes countries that have great differences in the extent, nature and history of broadcasting. Among the 14 countries in this region, there are two fairly advanced television

broadcasters, Australia and New Zealand, which are included here in the aggregate total of the region and, in consequence, introduce some error to the total as far as developing countries are concerned. Japan is not included in the present data.

Certain general aspects of television in this region must be taken into consideration before analyzing the data:

- in Asia, television has largely remained concentrated in urban areas, especially in countries like India, Malaysia, Pakistan, the Philippines, and Thailand;
- there are a limited number of transmitters, limited transmission time and exorbitant costs for television receivers in some of the countries; and
- there are several languages, dialects and cultures within many of the countries.

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

The amount of imported programs is largest among the children's programs, followed by entertainment. Information, educational, cultural and religious programs, however, are largely produced domestically. The situation varies from station to station and country to country. Comparisons with the 1973 situation are not always possible because new countries have since started television broadcasts in the region. The People's Republic of China had very few imported programs in 1973 (1%, mainly from Northern Korea, Albania and Romania), but now shows 8% imported programs. These include educational material and information programs from the United Kingdom. The Philippines has 72 television stations throughout the country and in the 1973, imported two-thirds of its foreign programs from the United States and the rest mainly from the United Kingdom. In 1983, the US share is close to 90% of the imported programs. Television in the Philippines is primarily an entertainment medium; 62% of the prime time and half of the total time are allotted to entertainment programs. The US share has also been high in countries like the Republic of Korea, Hong Kong or Malaysia.

It should be added that the Calcutta station in India is concentrating on domestic productions and imports very little, whereas the Delhi station has more foreign programming.



As to the Arab countries certain specific characteristics concerning television broadcasting in this region should be considered:

- although television activity began in the region in the 1950s most of the stations started in the 1960s. Recently, exchanges between the Arab countries have been intensified by their own satellite systems; and
- the language of broadcasting plays a special importance in the region. There are classic Arab, local Arab dialect, and foreign languages.

The results of this study confirm that there is a clear tendency to use the classic Arab language in broadcasting. On average, slightly more than 40% of the programs are imported, including programs from other Arab countries. Compared to the 1973 figures, it seems that the share of imported material has decreased in the region. Foreign policy changes obviously influence of foreign television programming. In Egypt, for example, almost one-fifth of the imported material was from the socialist countries in 1973; 10 years later they are not visible in the statistic at all. US programs are still dominant in most of the Arab countries, but their share has decreased from that of one-quarter of imported material in the People's Democratic Republic of Yemen in 1973 to 8% in 1983. American programs make up one-third of all of the imported in the region. In Syria, for example, US programs make up 23% of imported programs while Soviet television programs account for 17%. Compared with other regions of the world, the Arab countries import more from the socialist countries than Latin American, Asian or African countries. Obviously, French imports dominate in several Arab countries, especially in Algeria, Tunis and Lebanon. Imported programs dominate the categories of television plays and documentaries. Inter-Arab exchanges seem to have developed well.

The specific aspects of African Television include:

- 46 broadcasting organizations in sub-Sahara countries, but almost one half of the television station are in Nigeria. The Nigerian television stations broadcast a little over half of Africa's total;
- as in other developing regions of the world television sets are concentrated in urban areas; and, as elsewhere in the developing countries, the cost of receiver is beyond the means of the average income earner.

Due to the dominating role of Nigeria, the present statistic were calculated first including, then excluding, Nigeria. When Nigeria is included, the share of imported programs is 36% when it is excluded, the figure is 60%. US Programs make up about one-half of the imported material, one-fourth of the total output. Another major source is the United Kingdom. Programs from the socialist countries very rarely get time in African broadcasting. Instead, the international news film agencies and international organizations are a major source of program material in African countries. No inter-African television exchanges exist.

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

### CONCLUSIONS

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

The European discussions have also included the East-West dimension. According to the present figures, there are only a few changes to the earlier finding that there are more western programs in the East than vice versa. There seems to be a slight increase in the number of eastern programs on West German television. The eastern broadcasters, however have slightly increased the share of western programming. In assessing these exchange figures, one has to remember that there are a number of practical problems such as financing, and that not all of the problems are ideological or political.

One recent European plan is to extend the German-Swiss-Austrian satellite broadcast to Hungary, to be received there by cable. At least the Austrian and Hungarian broadcasters have discussed the improvement of their bilateral cooperation in this field.

In most Third World countries, television remains a medium found in urban centres and available to a relatively wealthy segment of the population. Furthermore, foreign programming almost exclusively originates in the major western countries and tends to have a dominant role.

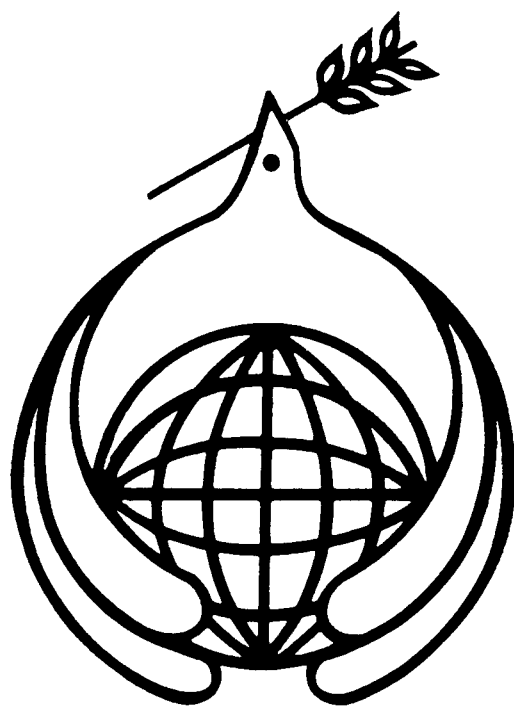
The increase in regional exchanges is particularly notable among the Arab countries and Latin America. In the Arab countries approximately one third of the imported programmes originate in the region itself. In Latin America, the figure is around 10 per cent. In a global perspective, there remain great regional differences in the amount and origin of the flow between nations and regions.

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

In the present economic conditions, it is not easy to predict how rapidly the development of the new communication technology will take place. It has been estimated that direct broadcast satellite channels will soon be flooding Western Europe with television programming. According to one estimate, most households in Europe should be able to receive at least a dozen different satellite delivered channels by the end of this decade, while many densely populated areas with extra equipment could have double this number.

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

**Source:** Tapio Varis: International Flow of Television Programmes, UNESCO,  
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