The Evolution of the Content of the European Public TV Channels (1996-2004)

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Introduction and Literature Review

In the 90's, new channels were launched at an incredible rate. According to a report by *Screen Digest* (2000), in that decade the number of private national or regional channels went from 100 to 1, 000, which means the launching of 100 new private channels per year. All the large private media companies invested heavily in the audiovisual industry with the aim of diversifying their assets and taking up positions in a sector with clear potential for development. At the end of the nineties, the number of channel have grown also thanks to the digital development (Hellman 2001; Aslama et al. 2004[a]; Brown & Picard, 2005).

Market competition is a relentless process, which makes program flow more and more international. This situation is also influenced by the appearance of transnational channels, and, above all, by the expansion of large multinational media groups, who wish to make their productions as profitable as possible, showing them everywhere they can.

In a context dominated by market logic, broadcasters look for maximum profit; that is, the best possible relationship between the cost of the program and the advertising earnings they produce. Consequently, programming – particularly on the private channels, although also on some public ones – is planned depending on strictly economic factors. And this frequently means absolute dominance of audience ratings as the criterion for evaluation of channel programming, at least on the general channels.

Broadcasters try to run as little risk as possible, staking everything on the most profitable genres and formats; frequently those which have been successful in other countries. Hence, they look for popular programs and that is why they are more focused on entertainment than in other kind of genres. International format distribution helps to economize on creativity, which is always scarce, and to reduce the risk of failure, but it favors the homogenization of schedules (Buonanno, 2002: 9). But in Europe there is enormous diversity in the market structure, cultural values, programming and funding systems from one country to another (Medina 2007).

A number of European producers who develop entertainment program formats have managed to enter the US market, reversing the traditional commercial format flow from the USA to Europe. However, these are isolated cases. Normally, European programs have small distribution, not only in the USA, but even within Europe. National market fragmentation impedes the movement of products abroad, and complicates co-production between companies in different countries (Medina 2004). Furthermore, "European national fiction is still today an important structural component of the schedules of public and private channels, and a means of great successes: a sign of its lasting ability to gain and hold the favor of the local audiences. Many broadcasters have considered it the strategic content of programming" (Buonanno, 2002: 10).

Public television channels were launched with a very well defined mission (HMSO 1994; Dryes & Wolf 1996). For decades, among other values, they have provided a wide range of quality programs (Iosifidis 2007). In fact they were required "to account for the diversity of social interests and viewpoints" (Mena-Aleman 2006: 198). According to Li and Chang (2001: 110), diversity increases consumer choice and serves public interest.

However, after the deregulation and the competition growth, they have been criticized by commercial operators because they undermine the competitiveness on the television industry (Tsourvakas 2004: 195). Hence, the current dilemma for public channels is either offering popular programs to maximize their ratings and incomes, or focusing solely on public service output, that is, minority programs, informative and cultural ones and documentaries (Hoskins, Mc Fadyen & Finn 2004: 185). Most of them provide a mix of both, popular and public value programs (Iosifidis 2007: 66). Since nineties, European public channels are under pressure to define their mission (León 2007; Meier 2003: 337).

Many authors have studied the diversity of television content. In general, these studies accept the idea that the diversity of program categories (genres) is a relevant factor to study the diversity programming. From this common starting-point, the approaches differ greatly, which proves the complexity of the concept.

The concept of genre is used to establish categories, and define some conventions, subjects and norms for each. It is not simply a question of theory, but is something that the audience recognizes and uses to identify a set of accepted rules, which change from one genre to another (Creeber 2001: 3). For television, the study of genres allows us to create a picture of the programming of the different channels, and, in our case, may also help to identify possible differences between the content of private and commercial channels.

Some authors differentiate between horizontal and vertical diversity (Litman, 1979, 1992; Mc Quail, 1992; Ishikawa, 1996). Vertical diversity is taken to mean the number of different program types, within the one channel and in a certain time-span. Horizontal diversity is the variety of the whole television system or of a certain number of channels. The difference can be stated as "channel diversity" and "system diversity" (Hillve et al. , 1997). Other authors have considered that the concepts of horizontal and vertical diversity are not enough to explain the different viewpoint on the topic (Hellman, 2001).

Pluralism and diversity in relation to media concentration has also been the object of study of many academics and an object of interest for European regulators. For example, Roth (2004) has studied diversity and competition in the Dutch television market. Aslama, Hellman, & Sauri (2004) do the same with the Finnish market and Meier (2003) studies the German case. Van Cuilenburg (2003) reflects on the implications of market competition and concentration in the diffusion of culture, taking into account that television is one of the most influential mediums in culture and society. Many studies follow the outline of vertical and horizontal diversity.

According to McQuail (1992: 144), mass media can contribute to diversity in three main ways: by reflecting differences in society, by giving access to different points of view and by offering a wide range of choice. Hence, diversity can be analysed in terms of media structure, media content and media audience. Hellman (2001: 183-184) outlines that choice at the level of media structure can be measured as the number of different kinds of television channels, and at the media content can be measured as the variety of programme types. The third level points us towards the variety of topics, life styles and ideologies behind the programmes. The same author noted, "as homogeneity between channels increased over time, an overall decline in programme" follows (Hellman, 2001: 187), as Dominick and Pearce had also concluded in their 1976 study of prime time in American networks. Busterna (1988), as well as Picard (2000), suggests that content quality and content diversity are respectively of each other.

Taking more into account the audience, Van der Wurf (2004:217) distinguishes between three types of diversity: diversity-as-sent: referring to the heterogeneity of programme types that are made available by broadcasters in a market; diversity-as-received: the heterogeneity of the programmes that audiences actually view, and diversity-as-choice, that expresses the absolute amount of different programme types that viewers can choose from. He also points out the risks for program diversity, quality and audiences when different broadcasters adopt similar strategies (Van der Wurf, 2004: 220).

In principle, one would think that the growth of competition (number of channels and hours of programming) would mean greater diversity in the system (Dominck & Pearce 1976; Power et al. 1994; De Jong and Bates 1991; Lin and Chang 2001). Following this approach based on neo-liberal thinking, the new varied market should mean the end of paternalistic protection of the media, as there would be more programming and more diversity. On the contrary, the critical school of thought considers that there should be legal and political rules, because, if the market is left to itself, it will come to a standstill and destroy its foundations.

Some studies seem to confirm that the growth of supply does not necessarily result in greater content diversity (Lin 1995). In the US, Litman (1979) analyzes the competition between the three American networks, between 1974 and 1979. He begins with the oligopoly theory, which states that the competitors come to implicit or expressed agreements to maintain their profit levels, instead of competing with each other. According to Lin and Chang (2001: 106), in an oligopolistic market where channels try to maximize audiences, the homogeneity is bigger because the rate of innovation is reduced.

In Europe, several studies come to similar conclusions, and support the oligopoly theory. Although the number of channels has multiplied in the last few decades, there has been little growth of diversity, as the market is still dominated by a few players who lay down the rules. This dominion has particular influences on acquiring rights over certain "strategic" contents, such as soccer or American cinema, which are controlled by those who control the market.

Van der Wurff and Van Cuilenburg (2001) consider that competition can stimulate diversity when it is kept at a certain level ("moderate competition"). Beyond this level of competition, there is "ruinous competition" which has a negative effect. In a later study on the situation in the Netherlands, Van der Wurff (2004) states that in that country with six channels, competition lowers program diversity.

Other researchers have shown the complexity of the relationship between competition and diversity (Greenberg and Barnett, 1971; De Bens et al., 1992; Flew, 1995; Croteau et al. , 1996, Napoli; 1999, Aslama et al. , 2004). A comparative study of several countries, carried out in Japan, concluded that the public channels offer more diversity than the private channels. The lower levels of diversity were to be found on American channels (ABC, NBC and Fox), and on the private Swedish channel TV3 (Hillve et al. , 1997: 297).

The competition among private and public channels have influenced in the content supply of public channels. Among the studies that support this process of commercialization we can highlight those by Schultz (1998) and Syvertsen (1992). Schultz considers that competition has made channels evolve and become more negative and sensationalist. Syverstsen, on the other hand, analyzes the situation in Norway in 1985 and 1986, and concludes that commercialization has led public channels to reduce the number of news programs and remove programs on art from prime time. On the contrary, other studies conclude that commercialization has never existed or that there continue to be marked differences between public and private channels (Sepstrup 1989; Brants, 1998).

Object of Study and Methodology

The questions we would like to answer are weather the growth of competition would mean greater diversity in the system, and particularly weather the competition influences in the diversity of the content of public channels. Hence, we will measure the level of diversity and the evolution of the kind of programs the public channels broadcast during the period of time 1996-2004 where the competition of television market increased in Europe.

It is a preliminary description work in order to see how the types of programs have evolved in the public channels in this competition environment. So we will focus on the study of vertical diversity related to media content as sent.

In order to analyze the content type broadcast by television channels and to decide if there has been significant change in the last few years, we have selected the public channels of the main European countries. Table 1 lists the channels included in the study and the countries where they broadcast.

Table 1. List of channels and countries studied

COUNTRY	CHANNEL
Austria	Orf1 Orf2
Belgium	RTBF1 RTBF2 BRN-VRT Canvas BRN-VRT 1
Finland	YLE TV1 YLE TV2
France	France 2 France3
Germany	ARD ZDF
Italy	RAI1 RAI2 RAI3
Portugal	RTE1
Spain	TVE1 La 2
Sweden	SVT
The Netherlands	Ned1 Ned2 Ned3
United Kingdom	BBC1 BBC2

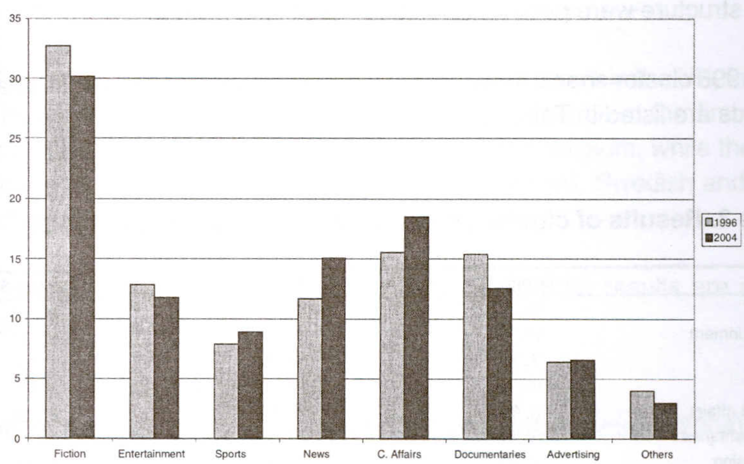
The data on the content type broadcast were obtained from the *European Audiovisual Observatory*. Given that there are some differences in how each country classifies content, we have a priori carried out a homogenization of the categories and reduced them to eight: fiction, entertainment, sports, news, current affairs[i], documentaries, advertising and others.

The period studied is 1996-2004. A temporal comparative analysis was carried out using the 1996 content data which was compared with the situation in 2004.

Results

Chart 1 shows the contents broadcast in each of the categories in the two years studied.

Chart 1. Type of content



The chart shows that, in global terms, there was a drop in fiction, entertainment, documentary and other contents, and an increase in sports, news, current affairs and advertising between 1996 and 2004. However, these changes do not appear to be significant.

To decide just how important these changes were, or in which categories they were important, we carried out an analysis of variance that allow us to establish that on the whole the changes in program categories by the channels were not very significant.

Table 2. Analysis of variance (ANOVA)

Contents	F	Sig.
Fiction	0. 467	0. 498
Entertainment	0. 434	0. 514
Sports	0. 415	0. 523
News	1. 398	0. 243
Current affairs	0. 574	0. 453
Documentaries	0. 937	0. 338
Advertising	0. 014	0. 906
Others	0. 576	0. 452

The results of the analysis of variance indicate that the contents broadcast by the channels as a whole have not been greatly modified between 1996 and 2004, except for a few slight variations in some categories.

In order to carry out an in-depth analysis of channel behavior on contents, cluster analyses which sorted the channels according to their programming structure were performed: one for 1996 and another for 2004.

The 1996 cluster shows three different programming structures: its characteristics are listed in Table 3.

Table 3. Results of cluster analysis for content structure (1996)

	Group 1	Group 2	Group 3
Fiction	40. 75	21. 50	26. 26
Entertainment	11. 72	12. 31	12. 20
Sports	7. 33	10. 94	5. 55
News	12. 19	14. 65	8. 05
Current affairs	5. 66	6. 05	27. 28
Documentaries	10. 75	25. 78	12. 15
Advertising	7. 20	5. 81	5. 04
Others	4. 39	2. 97	3. 48

Thus, group 1 corresponds to programming with a high percentage of fiction, and the amount of entertainment, news and documentaries was similar. The second corresponds to programming with documentaries in the foremost place, less fiction and a greater focus on news and sports. The third structure is more focused on current affairs with little sports, news and advertising.

The following are the channels whose structure is most like each of the three resulting groups.

Table 4. Channels included in the resulting groups of cluster analysis in 1996

Group 1	Group 2	Group 3
BBC1	BBC2	ARD
BRN-VRT Canvas	France2	Ned1
BRN-VRT1	Ned2	Ned3
France 3	RAI2	Orf2
La 2	RAI3	RTBF1
Orf1		RTBF2
RAI1		SVT
RTE1		YLE TV1
TVE1		YLE TV2
		ZDF

As Table 4 shows, group 2 includes the second channels in the UK, France, the Netherlands and Italy. Structure 1 is more common in the first channels in the UK, Spain, Italy, Portugal, Austria and Belgium, while the third structure includes German, Dutch, Belgian (Walloon), Swedish and Finnish channels.

The same analysis was carried out for 2004 and the results are as follows.

Table 5. Results of cluster analysis for content structure (2004)

	Group 1	Group 2	Group 3
Fiction	36. 15	25. 46	15. 70
Entertainment	8. 52	13. 73	8. 45
Sports	8. 70	6. 98	12. 47
News	9. 49	12. 04	36. 22
Current affairs	5. 93	27. 93	11. 65
Documentaries	17. 68	8. 55	6. 22
Advertising	8. 34	3. 90	8. 30
Others	5. 19	1. 40	1. 00

Thus, for 2004 we again have three structures. The first, again, focuses on fiction, although the percentage is lower, and there is a noteworthy presence of documentaries. The second corresponds to programming focused on current affairs with a high percentage for fiction and entertainment, and the third is basically news and sports. The channels whose programming fits into each group are shown in Table 6.

Table 6. Channels included in the resulting groups of cluster analysis in 2004

Group 1	Group 2	Group 3
BRN-VRT Canvas	ARD	BBC1
France2	BBC2	Ned 2
France 3	BRN-VRT	TVE1
La 2	Ned1	
Orf1	Ned3	
RAI1	Orf2	
RTE1	RAI2	
RTBF1	RAI3	
RTBF2	SVT	
	YLE TV1	
	YLE TV2	
	ZDF	

On the third place, we carried out an analysis to determine which channels had changed the structure of their programming most and least between 1996 and 2004. The Euclidean distance between the programming of each of the channels in 1996 and 2004 was calculated.

Table 7. Changes in programming in 1996-2004

Channel	Euclidean distance
France 2	86. 43
RAI1	97. 43
Orf1	103. 42
ZDF	131. 17
ARD	108. 74
YLE TV2	158. 72
SVT	164. 44
France 3	167. 81
BRN VRT Canvas	463. 08
RAI 3	540, 69
RTE1	503. 58
BRN VRT1	500. 68
RAI 2	541. 29
Orf2	525. 50
YLE TV1	593. 69
BBC1	701. 46
Ned3	713. 45
BBC2	701. 62
Ned2	770. 46
La 2	887. 57
Ned1	1, 005. 58
RTBF1	1, 072. 49
TVE1	1, 684. 14
RTBF2	2, 354. 48

As can be seen in the table, the channels with least content variation during the analyzed period were France 2, RAI1, the first Austrian one, the German channels, the second Finnish channel, the Swedish one and the third French one. The channels with most changes were the Belgians, Spanish, Dutch and the British.

Finally, the dissimilarity matrix was calculated. It shows the evolution of each channel in comparison to the others with reference to the content type. The distance the channel presented compared to the others in 1996 and in 2004 was analyzed. In this way, we can see if the channels are becoming more alike in their programming, or if, on the contrary, their differences have become greater.

Table 8. Content evolution for each channel compared to the others. 1996 and 2004

Channel	Distance 1996	Distance 2004	Variation
ORF 1	46, 596. 3	73, 088. 9	26, 492. 6
ORF 2	13, 490. 1	19, 449. 3	5, 959. 2
RTBF 1	19, 313. 2	33, 119. 6	13, 806. 4
RTBF 2	28, 731. 0	38, 613. 7	9, 882. 7
BRN-VRT1	22, 349. 0	20, 252. 1	-2, 096. 9
BRN-VRT-Canvas	18, 874. 7	40, 588. 2	21, 713. 5
ARD	22, 760. 3	25, 560. 2	2, 799. 9
ZDF	21, 840. 7	31, 339. 2	9, 498. 5
TVE 1	28, 676. 0	36, 238. 8	7, 562. 8
La 2	18, 771. 9	35, 912. 1	17, 140. 2
YLE TV1	13, 338. 8	31, 824. 8	18, 486
YLE TV2	17, 731. 9	25, 179. 3	7, 447. 4
France 2	20, 234. 8	22, 591. 6	2, 356. 8
France 3	20, 283. 5	30, 738. 9	10, 455. 4
BBC1	25, 210. 2	25, 495. 1	284. 9
BBC2	29, 267. 5	27, 376. 7	-1, 890. 8
RTE1	21, 385. 3	35, 185. 0	13, 799. 7
RAI1	15, 433. 7	22, 390. 2	6, 956. 5
RAI2	20, 755. 6	23, 120. 9	2, 365. 3
RAI3	17, 337. 4	19, 093. 8	1, 756. 4
Ned1	25, 816. 9	54, 310. 7	28, 493. 8
Ned2	43, 951. 0	69, 426. 4	25, 475. 4
Ned3	22, 074. 1	28, 114. 7	6, 040. 6
SVT	15, 611. 4	17, 128. 8	1, 517. 4
Total	549, 835. 3	786, 139. 0	236, 303. 7

We see in the table that the distances for each channel compared to the others are greater in 2004 than in 1996, which allows us to state that there has not been any convergence in the content type broadcast by European public television companies during this period. The only exceptions are the British BBC2 and the Belgian BRN-VRT1 whose contents are less different from those of the other channels in 2004 than in 1996.

Conclusions

The first conclusion is that there is no a significant change in the percentage of type of programs that the overall channels supply between 1996 and 2004.

We can assume that there is no a standard of the European public channels. Each national public channel has its own programming strategy. In each European country there are some factors, related to competition market, funding and cultural aspects, that influence in the behaviour of the public channels and make them different from the rest of the countries.

The change of the programming of the first public channels have been greater than in the second and third ones. Though Spain is an exception, because the evolution of the kind of programs of the second channel has been bigger than the first one, TVE 1. Most of the countries –France, Austria, Belgium, Finland, United Kingdom and Netherlands – have a second public channels with similar programming based on documentaries and news.

Discussion and Further Research

There are still some questions that are not solved by the measurement of diversity.

a) Is diversity a public value, so public channels should be committed to offer diversity of programs, or on the contrary, diversity should be achieved among the all the channels, both public and commercial ones?

b) Should public channels focused on a type of programs such as documentaries, news and current affairs, especially if commercial channels do not supply these kind of contents? As Mena-Aleman suggests, "it seems that in this new environment of higher competition, PSB will only be fully justifiable if it does what others fail to do, to the extent that is needed" (2006: 201).

c) Other issue that could be interesting for further research is the level of diversity between advertising funded public channels and public funded broadcasters. According to Iosifidis (2007:70), the dependency on advertising leads to emulate the competitors channels and orient to entertainment. So diversity can disappear of the television supply and the consumer choices and public interest could be reduced.

What seems clear is that to study the diversity as supply for the audience, a study of the commercial channels should be run and a comparison between the evolution of public channel and the private ones. At the end, diversity will be achieved more adequately taking into account the overall supply.

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[i] The name used by these programs by the EAO is "information", however, we have chosen "current affairs" to distinguish them from "news".