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Commercialisation and Programming Strategies of European Public Television. A Comparative Study of Purpose, Genres and Diversity.

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Abstract

The increase of competition in the European television market has raised concern about commercialisation of public broadcasting. European public television struggles to survive, adapting to a competitive environment and maintaining the principle of public service. Some public broadcasters -it is argued-, have been forced to follow a strategy of convergence of their programming with that of their commercial competitors. In other cases, public televisions have maintained a highly distinctive programming, with more "serious" content, including political issues. This paper presents the main results of a study on prime-time programming of European public and commercial broadcasters, which has been carried out in 14 countries of the European Union, in 2003 and 2004. The main results indicate that European public television has reached a significant level of commercialisation, although there are still some differences with private programming, since public broadcasting is more oriented to information and maintains a higher level of diversity.

Introduction

In the last few decades, the landscape of media has suffered some radical changes, as a consequence of neo-liberal policies, which have promoted a new commercial environment, favoured by the deregulation of the sector. Globalisation of the television market is linked to the growth of multinational groups, which try to maximise their profit by showing their productions in as many windows as possible. According to Thussu, 2000: 119), "it is now imperative for media conglomerates to plan their strategies in a global context".

Very often, programmes are either produced or inspired in North American models, mainly focused on entertainment. In Thussu's terms, "global infotainment" is getting larger and larger audiences (Thussu, 1999: 323). In Europe, this trend has several consequences, one of which is a high degree of dependence on North American products that has provoked a constant increase in the trade deficit of the European Audiovisual sector; which is over 8 billion euros (Hieronymi: 2005).

Since commercial channels entered the European market, in the early 1980's, public television faced a competitive environment, which shook the foundations of public service broadcasting. In the new situation, public channels must take into account the logic of the market or, in other words, compete for the audience. The status of public television, in opposition to commercial broadcasting, derived from its different mission statement, was maintained for some decades, as both sectors were hardly competing with each other. Since 1980 the situation changed dramatically, as new commercial channels were created, in the favouring winds of liberalisation of the telecommunications sector. In 1980 there were 36 public and 5 commercial channels in Europe. In 1997 the situation had reversed, since there were 55 commercial channels and 45 public channels. The increasing presence of commercial channels, it is argued, has undermined the ideals of public broadcasting (Holtz-Bacha & Norris, 2001: 123).

Several authors have discussed the influence of competition on programming. In general, they point towards negative consequences, such as reduction of standards of quality and more sensational and low quality content (see, for example, Blumler, 1992; Humphreys, 1996, Mc Quail & Siune, 1998; Schultz, 1998). Commercial television has often been seen as having a negative impact on democracy, since it often tries to satisfy the basic desires of the audience, not their needs (Tracey, 1988: 34). This makes public television an indispensable element for a complete development of citizenship in a complex society.

It is argued that competition has forced public broadcasters to get into the logic of the market, adopting programming models which, in principle, correspond to commercial broadcasters. Public television has "commercialized" its programming, which means that it has emphasized entertainment over information and education (Hellman & Sauri, 1994).

In more general terms, some researchers suggest a scenario of convergence, in which differences between public and commercial channels tend to decrease. This imitation of the commercial behaviour –it is argued-means that public channel leave quality programming aside to embrace profitable programmes. Several studies seem to confirm this hypothesis in countries like France, Italy, Belgium, Spain (Blumler & Hoffman-Riem, 1992: 25) and Germany (Schatz et al, 1989). Convergence has also been suggested in the opposite sense: from the commercial to the public sector. According to this point of view, some private channels have increased the time they dedicate to information, in order to offer an image of "seriousness" (Meier, 2003).

But empirical evidence is not concluding (Meier, 2003). Some studies reckon there is certain degree of commercialization but introduce other trends, that point towards the complexity of the topic (vg. Syvertsen, 1992, in Norway). Other researchers have found ambivalent or even opposite results to the hypothesis of convergence. In Finland, contrary to what might be expected, the structure of prime-time programming did not change with the competition, although the percentage of entertainment increased from 35% to 48%, in the period 1980-92 (Hellman & Sauri, 1994). In this country, other studies have found that, in spite of the competition, prime-time programming has remained stable, with information and national productions as the most frequent contents. These data are interpreted as an evidence of the existence of a general structuring principle that makes "traditional entertainment" to be necessary at "traditional hours" as means to support "traditional family life" (Hellman & Sauri, 1994).

In Germany, Krüger (1991, 96) claims that the arrival of commercial channels did not provoke convergence but even some divergence between the public and the private sector. Nevertheless, other researchers suggest that this market is “shaped by a selective convergence” (Meier, 2003: 340).

In Holland, Brandts (1998) compared programming during electoral campaigns in 1994, 1998 and 2002, concluding that public channels did not follow the trends of the commercial channels, in search for entertainment.

Some multinational studies also seem to contradict the hypothesis of convergence or, at least, show some differences between both sectors. For example, Septstrup (1989) analysed prime-time in several countries, concluding that public channels include “serious content” in 55% of their programmes, whereas for the private channels the figure varies from 30% to 40%.

Heynderickx (1993) studied programming in 16 channels (most of them public broadcasters), to conclude that competition has not forced public channels to marginalize serious content, such as political information. On the other hand, commercial channels do not offer exclusively entertainment, since they need to legitimate themselves as “serious” broadcasters, offering informational programmes.

Therefore, empirical research does not allow to draw a clear picture of the differences between public and commercial channels. National research seems to offer ambivalent or even contradictory data. And, secondly, the situation portrayed by international studies may well have changed in the last decade, as the largest multimedia groups have expanded, increasing dependence on North American productions, as suggested by Pleitgen (1999).

This paper explores the current situation of television programming in 14 European countries, in an attempt to present a general view of the similarities and differences between the private and the public sector. It focuses on three key features of the mission of public broadcasting: the purpose, genres and diversity of programming.

Information and entertainment (purpose and genres)

When British public television was established, the first Director General of the BBC, Lord Reith, expressed the objectives of the new institution in terms of “to inform, educate and entertain” the audience. In the following years, this formulation was accepted by other European public broadcasters, to the extent of becoming a common reference to define the role of public broadcasting. To Lord Reith, entertainment was certainly in the last position, since he considered information and education to be core objectives of public television. On the contrary, for the commercial channels that were set in the following years, the new medium was mainly a new business opportunity and entertainment was the main purpose.

This status remained unchanged until competition of commercial channels forced public service broadcasters to fight for the audience. Competition provoked a decrease of audience shares, which had an impact in programming strategies. In this regard, the situation of the US market can be illustrative. It has been described as follows (Lin, 1995: 492):

> In order to remain economically viable, the networks have been engaged in a perpetual dog-fight to maintain their viewing shares. This competitive environment has facilitated the development of the networks' more conservative behavioural norm, as far as programming strategies are concerned.

For the commercial sector, the logic of market imposes the domination of those contents that get higher audience figures, since their capacity of risk is very limited. Therefore, it is argued, they tend to emphasize entertainment over information and education. For public broadcasters, in principle, the market is not the fundamental driving force but, in fact, they find it more and more difficult to include “serious” content, especially in prime-time.

Generally speaking, entertainment oriented programmes seem to dominate the market. The study of Eurodata TV Worldwide (2007) identifies the most successful programs in 87 territories, including the ten high a higher audience rating of the year in each country. According to this research, 46% of those programmes fitted into the category of fiction, whereas 36% were “entertainment”. The third category was information, with 18% of the programmes. In Europe, a study of the 20 most popular programmes of the year in the whole European Union, showed the following results: sports (32.5%), fiction serials and feature films (25%), information (7.5%) and musical shows (5.1%) (Laporte el al, 2001).

Therefore, if public channels try to compete for the audience, in principle, they should focus on entertainment, rather than information. On the contrary, if they remain loyal to their original mission statement, they should keep a higher level of information than their commercial competitors. This is a key issue on the debate about the function that public service broadcasting must fulfil in a modern society and an important consideration about its legitimacy.

However, the issue presents other aspects. For some authors, public television should not distinguish itself from commercial competitors by giving up entertainment. This would mean not taking the entertainment element as part of the social function of public tv (Costera Meijer, 2005). Nevertheless, it is relevant to know if there is a difference between public and private broadcasters, regarding the levels of entertainment and information they keep.

To a certain extent, research supports the view that commercial competition has forced public television to adapt its content, in search for a wider audience, either for economic reasons or legitimisation of its role in the new environment. As new commercial competitors have entered the market, public broadcasters have adapted their programming grills, focusing on entertaining and trans-national content (Hellman & Sauri, 1994).

Other studies have reported that there are still some relevant differences between public and commercial programming, as far as level of entertainment is concerned. Sepstrup (1989) analyses a week of prime-time programming in a number of channels of several countries, concluding that public broadcasters include “serious” content in 55% of their programmes, whereas for commercial channels, this percentage varies form 30 to 40%.

In France, some differences between public and commercial broadcasters have been found in the area of cultural programming. Using a wide concept of culture, a study shows that public channels F2 and FR3 had almost a 30% of culture in their programming grills, whereas commercial broadcaster TF-1 and M5 had only about 15 to 20% of the same type of content (Dagnaud, 1999: 25).

Therefore, empirical research in this regard is limited to some studies in particular countries and, very often uses different categories that make it difficult to establish a multinational comparison. Therefore, it seems convenient to present a general view of the situation in Europe, regarding the purpose of the programmes and the genres which are used.

Diversity

The “High level group” (1998: 23), chaired by Marcelino Oreja, stated that public television must offer education, information and quality entertainment. This report considers that Public service broadcasting must keep a balance between the different categories of programming, taking into account that it is necessary to counteract the tendency of commercial channels to depend more on a few types of programmes.

Diversity of programming is of great importance, since the mission of public television is linked to the need to serve a wide audience, using an ample spectrum of genres. According to Blumler (1992), in a market of competition, diversity is one of the endangered values of the television system. Therefore, public television must maintain a diverse programming, avoiding the often standardized homogeneous programming of the commercial channels.

Diversity is a multidimensional concept, which can be understood in different ways. As Hellman (2001) states, in the model of thought dominated by the market economy, diversity is initially related to the possibility of choice of the spectator, as far as quantity and spectrum of programmes are concerned. Therefore, more channels mean that there are more possibilities of a diverse programming to please the audience.

According to Mc Quail (1992: 144-5), mass media can contribute to diversity in three different ways. Firstly, reflecting the differences of a society; secondly, facilitating the access of different points of view; and, finally, offering a wide spectrum for the choice of content. In the third sense, diversity means heterogeneity of content and becomes a goal in itself for public service broadcasting, since it is a synonymous of pluralism. For public broadcasters, diversity is a normative criterion of quality, as it allows serving the audience, pursuing the goal of pluralism. Therefore they must offer a multi-faceted programming that combines different purposes (information, education and entertainment), as well as a wide range of topics, forms, dramatic modes and genres.

Several researchers have tried to measure the diversity of television content. In general, it is accepted that diversity of programming categories (genres) is a relevant factor to know if a channel or television system offers a varied programming schedule. But from this starting point authors focus on different aspects, which show the complexity of the concept.

Some authors have distinguished between vertical and horizontal diversity (vg. Litman, 1979, 1992; Mc Quail, 1992; Ishikawa, 1996). Vertical diversity is understood as the number of different types of programme which are shown on a channel within a specific period of time. Horizontal diversity is the variety of the whole television system or of a number of channels. According to Hilve et al. (1997) the distinction can be understood in terms of "diversity of the channel" and "diversity of the system". Other researchers consider that vertical and horizontal diversity are not sufficient to explain the different facets of the concept (Hellman, 2001; Wan der Wurff, 2004ª, 2004b).

In principle, it may be thought that horizontal diversity will increase as the offer grows (higher number of channels and more hours of output). Vertical diversity is also supposed to increase with competition. According to this hypothesis, which is rooted in neo-liberal thought, the new diversified market will ensure enough horizontal diversity and demands the end of the paternalist protection of the media. But, on the other hand, some critics claim that there must be some legal and political rules, because if the market is left on its own it will not generate enough diversity.

Research indicates that the relationship between competition and diversity is of a complex nature (vg. Greenberg & Barnett, 1971; De Bens et al, 1992; Litman, 1992; Flew, 1995; Croteau et al., 1996 ; Napoli, 1999 ; Aslama et al., 2004). Empirical evidence seems to confirm that the increase in the offer does not necessarily imply a greater diversity of content. In the United States, Litman (1979) analyses competition among the three networks, from 1974 to 1979, starting from the theory of oligopoly, according to which competitors sometimes look for tacit or explicit agreements to maintain their level of profit, instead of competing among each other. According to Litman, this is the case for the three American networks, which have decided to maintain a number of agreements of principle, such as beginning the new season in September or a specific percentage of new production every year.

Lin (1995) has studied the programming strategies of he three networks in the decade of 1980. Among her main conclusions, the following ones can be highlighted:

1. As the offer increases and audience share for each network is reduced, “pure counterprogramming” (offering something different to the other two channels) decreases.
2. As audience shares decrease, the strategy of “blunting a counter” (offering something different to one of the competitors) also decreases.

In this situation of competition, the networks use the strategy of “pure blunting” (duplicating the offer of the other two networks), or else “countering a blunt” (offering something different two the other two, when they duplicate each other). In other words, competition leads the networks to use conservative strategies (Lin, 1995:429).

In Europe, a number of studies have reached similar conclusions, supporting the hypothesis of oligopoly. Although the number of channels has grown in the last few decades, diversity has hardly been increased, since a few players dominate the market and impose their own rules. This domination is especially important for the acquisition of rights for “strategic content”, such as football or North American feature films, which are controlled by the hegemonic players. For example, in Germany, the duopoly Bertelsmann-Kirsch has provoked that the increase in the offer has not meant a larger degree of diversity of content (Humphreys & Lang, 1998).

Wan der Wurff & Van Cuilenberg (2001) state that competition can stimulate diversity, as long as it is kept on a level of “moderate competition”. From this threshold, competition becomes “ruinous”. In a later study of the situation in Holland, Van der Wurff (2004) indicates that, for this country, when the number of channels is higher than six, diversity decreases. This can be explained considering that public channels contribute to diversify the offer in a significant manner and, as a consequence, when the number of channels increases (mainly with commercial braodcasters), the proportion of public channels is smaller and this reduces the average diversity (both vertical and horizontal).

The idea that vertical diversity is usually higher in public than in commercial channels is supported by other empirical data. A comparative work of channels of different countries, carried out in Japan, came to the conclusion that public channels offered a greater degree of diversity than commercial broadcasters. The lowest levels of diversity where those of the American networks ABC, NBC and Fox; as well as the Swedish channel TV3 (Hillve et al., 1997: 297).

This study analyses differences of diversity between the public and the commercial sectors. For this purpose, vertical diversity of public and commercial channels in different European countries is measured.

Hypotheses

Considering previous research and the objectives of this study, the following four hypotheses are formulated:

H1. Commercial channels are more oriented to entertainment than public channels and they use entertainment genres more often (vg. fiction series, movies and reality shows).

H2. Public broadcasters are more oriented to information than commercial channels and they use information genres more often (vg. daily news, weekly news and magazines).

H3. Public television maintains a higher level of vertical diversity in their programming; depending to a lesser extent on a few hegemonic genres.

Methods

The study of level of entertainment and information in the whole output of the channels used data provided by the channels themselves, collected by the European Audiovisual Observatory. It circumscribes to five countries (the five biggest European markets), since programming categories vary and make it difficult to establish a comparison of the 15 members countries of the European Union in 2003, and even more difficult of the Union of 25 members after the 2005 enlargement.

For the rest of the study (levels of entertainment/information, genres and diversity in prime-time), we analyse the situation in all the member countries of the European Union in 2003 and 2004, except Luxembourg, where there is no public television. Prime-time programming in each of the 14 countries was analysed during the week of 22nd to 28th of September, 2003; and the week of 20th to 26th of September, 2004. In each country, the leading public and the leading commercial channels were selected, according to audience the ratings of the previous year. In Belgium, due to the special language situation of the country, the leading public and commercial channels in French, as well as the two leading channels in Flemish were analysed.

Some public broadcasters own two separate channels and they distribute its programming between both of them. Usually, the first channel is more oriented to entertainment, whereas the second one broadcasts more information and, in some cases, educational programmes. Although some data from second channels have been collected, only the first channels are analyzed, since they usually reach larger audience ratings and therefore play a more relevant role for the public.

The study is circumscribed to prime-time, since this slot has a greater impact in the global audience figures of the channels and, therefore, the programming strategies used are especially relevant. Prime-time was established in each country as defined by media agency network Carat. In those countries where prime-time lasts for more than three hours, those three with a higher audience rating were selected.

Data were collected from programming guides in each country and some additional sources and coded by each associated researcher, who was typically a PhD or PhD candidate. Afterwards, another researcher coded 15% of the units of the original sample (randomly chosen), in order to estimate intercoder reliability. Average agreement (formula of Holsti) was of 88.75%, which is considered to be acceptable.

Data are referred to the number of broadcasts, which is considered to be more relevant than length, for the purpose of this study. The duration of each programme is determined, among other factors, by its own genre and characteristics. A larger duration does not always mean that the programme is more important for the channel's strategy. For example, a daily news programme is typically 30 minutes long, whereas a reality show often lasts two or three hours. Programmes are classified into 15 different genres, according to commonly used categories. This general scheme of classification allows for a comparison among different television companies and countries, which typically present their output using different genre categories.

The purpose of "information" is adjudicated to those programmes which main objective is to try to explain the complexities of a society. "Entertainment" programmes are those designed mainly for distraction and enjoyment. Taking into account the increasing importance of hybrid genres, a category of "infotainment" was included for those in which both purposes are equally important. Programmes which main purpose is "to educate" are those which try to communicate specific contents that can be evaluated afterwards in some way.

Although this method allows for a degree of subjectivity, as a general rule, the criterion of each delegate researcher was maintained. However, in some cases, a number of changes were introduced, in order keep the same criterion for all the countries (vg. programmes on celebrities were coded as *infotainment*, not *information*).

The degree of diversity can be measured using different indices, such as the Hefindahl index or the relative entropy index (Hillve et al, 1997: 297). Considering the purpose of this study, we follow the method used by Dominick and Pearce (1976: 73), to analyse "the extent to which a few categories dominate prime-time". The index is derived by summing the percentages of the top three categories (genres) and subtracting from 100. A low score indicates a restricted range of choices for the audience. This index allows to show the differences in vertical diversity of the two sectors.

Results and discussion

Level of entertainment and information

As table 1 shows, entertainment is the main purpose of 50.5% of the analyzed programmes (883 out of 1747). Other purposes are clearly behind in the scale of priorities: information (33.2%) and education (1.9%). The hybrid category of "to inform and entertain" has a significant percentage: 14.3%.

For both sectors, entertainment is the most frequent purpose of prime-time programming, although the share of entertainment is higher in the commercial channels (60.6%) than in public channels (42.1%). This distance of 18.5% suggests that the public sector still keeps a significant difference in the purpose of its programming in relation to the commercial sector (H1). On the other hand, the public channels are more oriented to information (38.2%) than the commercial channels (27.2%) (H2).

In the average for public channels, the distance between information and entertainment is very small (3.9%), whereas for commercial channels entertainment is ahead of information by 33.4%. Education appears to be a marginal objective, although it is higher in the public channels.

Table 1. Purpose of prime-time programming in European public and commercial channels, 2003-2004 (number of programmes)

	To entertain	%	To inform	%	To inform & entertain (infotainment)	%	To educate	%	Total	%
Public Channels	400	42.1	363	38.2	157	16.5	30	3.2	950	100
Commercial Channels	483	60.6	217	27.2	94	11.8	3	0.4	797	100
Total	883	50.5	580	33.2	251	14.3	33	1.9	1747	100

Table 1 suggests that public channels keep entertainment relatively balanced with information, whereas the commercial channels clearly emphasize entertainment over information. An analysis of public channels in each country (table 2) shows that there is a wide spectrum of proportions between both purposes. In nine countries, entertainment is the dominant purpose, whereas information leads in the other five.

Among public broadcasters, the highest percentages of entertainment are found in Austria (60.7%), Italy (59.5%) and Portugal (54.0%). On the lower part of the table, the public channels with less entertainment programmes are those of Greece (8.0%), Finland (29.7%) and Denmark (31.3%).

Surprisingly, the level of entertainment is not necessarily higher in those public channels which have a greater deal of dependence on advertising. This relationship can be established in countries like Spain (advertising income over 60%), Italy (44%) and Portugal (50%). In addition, some countries with a low share of advertising also have low proportion of entertainment oriented programmes: Greece (only 5% of advertising), Finland (no advertising) and Germany (13%) (Noticias de la comunicación, 2000: 22). However, other countries like the United Kingdom and Sweden, which have no advertising still keep a high level of entertainment.

In principle, the level of entertainment should be higher in those channels which keep a higher market share and, therefore, must compete to keep that position. Nevertheless, the comparison between market share and level of entertainment of public channels does not allow drawing any clear conclusion. The only country where this relationship can be established is Greece: 14. 1% of the market and 10.5% of entertainment, in 2003 (European Audiovisual Observatory, 2004). However, in other countries it is difficult to establish this relationship.

These data can be interpreted as an evidence of the fact that the market is only one of the factors contributing to the programming strategy of public broadcasters. In addition, several political and social factors seem to have an influence.

Table 2. Main purpose of prime-time programming in public channels in 2003-2004 (% of programmes)

	To entertain	To inform	To inform & entertain	To educate
Austria (ORF-2)	60.7	37.7	1.6	0
Belgium (VRT-1)	46.7	33.5	13.2	6.6
Denmark (TV-2)	31.3	53.1	15.6	0.0
Finland (YLE-1)	29.7	55.4	14.9	0.0
France (France 2)	32.6	37.2	30.2	0.0
Germany (ARD)	56.1	13.3	27.6	3.1
Greece (ET-1)	8.0	38.0	42.0	12.0
Ireland (RTE-1)	46.8	26.6	26.6	0.0
Italy (RAI-1)	59.5	40.5	0.0	0.0
Netherlands (NED-2)	52.5	13.1	34.4	0.0
Portugal (RTP-1)	54.0	34.0	8.0	4.0
Spain (TVE-1)	33.3	35.7	31.0	0.0
Sweden (SVT-1)	46.7	37.3	9.3	6.7
UK (BBC-1)	40.8	35.2	22.5	1.4
Total	41.5	37.8	17.7	7.5

Genres

As table 3 shows, fiction is the first category in the output of the main channels in the five largest European markets (27.0%). Although percentages are relatively high in all the countries, some commercial channels lead the ranking ((Italia 1, 68.2%; Rete4, 54.9%; Antena 3, 33.7%). Light entertainment (14.0%), news (12.0%) and sports (5.3%) are the other main categories. The channels with a higher percentage of news are Canale 5 (31.4%), BBC (20.9%) and Telecinco (20.3%). Surprisingly, two of them are commercial channels. However, as we will see later, daily news are a genre which is equally important for public and commercial channels.

Table 3. Output of European channels in 2003 by programming categories (in hours)

	Fiction	%	Light entertainment	%	News	%	Sports	%	Total hours
Germany									
ARD	410	28.5	120	8.3	146	10.1	124	8.6	8760
ZDF	384	26.7	118	8.2	145	10.1	86	6.0	8760
SAT1	355	24.7	385	26.7	32	2.2	21	1.5	8760
RTL	389	27.0	275	19.1	66	4.6	33	2.3	8760
Spain									
TVE	4393	25.5	1045	6.1	1485	8.6	1372	8.0	17240
Telecinco	343	24.8	216	15.6	281	20.3	6	0.4	8437
Antena 3	563	33.7	372	22.2	255	15.3	3	0.2	10171
France (1)									
TF1	3018	35	1192	14	751	9	402	5	8736
France 2	2481	28	1101	13	1343	15	548	6	8736
France 3	2414	28	584	7	1741	20	489	6	8588
United Kingdom									
BBC	3367	22.0	2712	17.7	3194	20.9	1342	8.8	15299
ITV	1882	21.5	1304	14.9	1409	16.1	676	7.7	8760
Channel 4	1990	22.7	2239	25.6	346	3.9	1041	11.9	8760
Italy									
RAI	6407	25	5068	19	2906	11	1266	5	
Canale 5	3091	32.3	2694	30.6	2751	31.4	47	0.5	8760
Italia 1	5970	68.2	1004	11.4	727	8.3	863	9.9	8760
Rete 4	4809	54.9	1359	15.5	1209	13.8	77	0.9	8760
Total	42266	27.0	21788	14.0	18787	12.0	8396	5.3	156047

Source: author's own elaboration with data from the European Audiovisual Observatory (Yearbook 2004).
(1) Data of 2002.

These data offer a general view of the programming grills in these countries but it seems convenient to complete it with an analysis of prime-time programming grills. Our own study of 14 European countries in

2003 and 2004 shows that, in general, prime-time is mainly configured with the same genres as the whole programming schedule, although percentages vary significantly (table 4). Fiction series (24.0%) and daily news (23.6%) are the two main genres in European prime-time. Other categories are well below in the list: magazines (10.0 %); documentaries (5.4%), reality shows (5.0%), etc.

The distribution of genres in each sector suggests that, at a European scale, there are some relevant differences between programming grills of public and private broadcasters. Firstly, fiction series are more frequent in the private sector (32.3%) than in the public sector (17.0%). The second largest difference is that of documentaries: 8.1 in the public channels and 2.3 in the private sector. Similar differences can be found in magazines (12.8%, public; 6.8% private) and reality shows (8.3%, commercial; 2.2%, public). This data confirm that entertainment genres are more frequent in commercial channels (H1) whereas information genres are more frequent in public channels (H2).

Daily news represent about a quarter of the total number of prime-time programmes, with similar percentages for public and commercial channels. Contrary to what could be expected, daily news are more frequent in the prime-time slots of the private channels (24.2%) than in the public channels (23.2%). These data contradicts H2 and can be related to the need for legitimisation of the commercial channels. In addition, daily news can get good audience ratings in most countries.

Table 4. Genres in prime-time European television programming 2003-2004 (% of programmes)

	Public channels	**Commercial Channels**	**Average**
Fiction series	17.0	32.3	24.0
Daily News	23.2	24.2	23.6
Magazine	12.8	6.8	10.0
Documentary	8.1	2.3	5.4
Quiz show	6.1	3.0	4.7
Reality show	2.2	8.3	5.0
Feature film	4.7	4.8	4.7
Sports	6.2	2.6	4.6
Infotainment	3.2	5.1	4.1
Talk show	3.2	0.9	2.2
Tv movie	2.2	2.6	2.4
Musical show	2.5	0.1	0.9
Weekly news	0.6	1.1	0.9
Cartoons	1.0	0.3	0.7
Other	6.9	5.6	6.3

he breakdown of genres in public channels (table 5), shows that the percentage of daily news is important in most countries and specially high in Italy (38.4%), France (32.6), Spain (30.9%) and Finland (30.6%). On the opposite side, it is very low in the Netherlands (3.3%).

It is interesting to notice that the commercial channels of the same countries (table 6) broadcast a high share of daily news (with the exception of Spain): Italy (36.6%), Finland (37.3%) and France (31.8%). In Italy and France, the percentage of daily news is slightly higher for the commercial channels than for their public competitors. The case of Spain requires further explanation. Telecinco broadcasts its main news programme starting at 20.30 h., before the beginning of prime-time. Nevertheless, it is a channel that dedicates 20.3% of its total output to news, one of the highest shares in Europe (table 3).

This may seem to provide some empirical evidence to support the hypothesis of the need for legitimisation of the commercial channels. Nevertheless, the results for other countries are not so concluding. For example, NL1 (Netherlands) is the public channel with a lower share of daily news (3.3%), but its commercial competitor, RTL1, broadcasts a much higher share of news in prime-time (23.7%).

Fiction series are very important for most public channels, especially in Belgium (24.0) and Ireland (22.5%). This category is not so relevant in countries like Greece (0.0%), Italy (5.1) and France (6.9%).

The comparison of fiction series programming between public and commercial channels (tables 5 and 6) does not allow to support the hypothesis of convergence. In some cases, though, a high percentage of this genre in a public channel is linked to a high level in the commercial channel of the same country (vg. the UK and Denmark). On the other hand, the country with a lower rate of fiction series among the commercial channels (France), has also a low percentage of fiction series. However, this data do not seem to provide enough evidence to support the idea of a clear influence of the fiction output of the commercial sector in that of the public broadcasters.

Magazines and sports are relatively significant in most public channels, although percentages vary widely from one country to another. The share of sports is higher in the public channels of all the countries, than in the commercial ones. This can be explained considering that traditionally public broadcasters have own the rights of most popular events (vg. football leagues), and still keep several sports programmes in prime-time; although the situation is changing in the last few years and many events are now owned by commercial broadcasters.

Documentaries are of secondary importance for public channels, except in Greece, where they represent 59.2% of prime-time programmes. ET1 represents a peculiar situation in which the low market share of the channel (14.1%) and a high level of public funding (95%) seems to be associated to this higher percentage of documentaries.

Table 5. Programming genres of public channels in prime-time, 2003-2004 (% of programmes)

	Fiction series	Daily news	Magazine	Sports	Quiz show	Reality show	Docu-mentary	Feature film
Austria (ORF1)	16.3	31.1	1.6	18.0	8.2	4.9	0.0	11.5
Belgium (RTBF-1/VRT1)	24.0	19.5	24.0	1.7	7.3	2.2	5.6	6.7
Denmark (TV2)	9.3	21.9	13.0	6.3	3.1	0.0	3.1	3.1
Finland (YLE1)	11.5	28.9	20.0	8.7	4.3	0.0	11.6	2.9
France (France 2)	6.9	32.6	30.0	0	2.3	2.3	0.0	4.7
Germany (ARD)	17.3	31.6	19.0	7.1	5.1	1.0	4.1	0.0
Greece (ET1)	0.0	14.3	4.1	14.3	0.0	0.0	59.2	8.2
Ireland (RTE1)	22.5	17.5	16.0	1.2	5.0	2.5	10.0	6.2
Italy (RAI-1)	5.1	38.4	18.0	0.0	17.9	5.1	0.0	2.6
Netherlands (NL1)	13.1	3.3	3.3	23.0	14.8	6.6	0.0	0.0
Portugal (RTP-1)	10.0	28.0	0.0	2.0	12.0	2.0	4.0	4.0
Spain (TVE-1)	17.9	33.3	2.6	0	2.6	0	2.5	10.2
Sweden (SVT)	16.2	27.0	2.7	4.0	2.7	1.3	14.9	2.7
UK (BBC-1)	9.2	31.4	3.7	0.0	1.8	3.7	5.5	5.6

Among the commercial broadcasters (table 6), apart from fiction series and daily news (already analysed), magazines obtain high percentages in most countries, whereas reality shows and quiz shows appear less frequently. Feature films are not very frequent and do not vary significantly in relation to public channels. The high cost of broadcasting rights of recent popular films can explain the relatively low presence of this genre, specially in the commercial sector.

Table 6. Programming genres in private channels in prime-time, 2003-2004 (% of programmes)

	Fiction series	Daily news	Magazi ne	Sports	Quiz show	Reality show	Docu-mentary	Feature film
Austria (PRO7-SAT1)	24.5	13.2	15.1	0.0	0.0	0.0	0.0	15.1
Belgium (RTL-TVi/TVM)	24.8	24.7	13.3	3.5	3.5	7.9	2.6	6.2
Denmark (TV3)	40.7	0.0	18.5	3.7	0.0	7.4	0.0	11.1
Finland (MTV3	21.3	37.3	2.7	8.0	5.3	2.7	0.0	9.3
France (TF1)	9.1	31.8	4.5	2.3	0	31.8	2.3	6.9
Germany (RTL1)	36.8	19.1	16.2	5.9	7.4	1.5	1.5	1.5
Greece (ANTENNA-1)	29.0	16.7	0	1.6	0	12.9	11.2	1.6
Ireland (TV3)	64.4	16.9	1.7	0	0	0	1.7	8.4
Italy (Canale 5)	9.8	36.6	4.9	0	0	7.4	0	4.9
Netherlands (RTL1)	33.9	23.7	0	0	3.4	15.8	1.7	0
Portugal (SIC)	57.7	26.9	0	1.9	0	3.8	0	1.9
Spain (Tele 5)	30.7	0.0	7.7	0	0	7.7	0	7.7
Sweden (TV4)	11.9	41.7	1.2	3.6	5.9	16.7	5.9	3.6
UK (ITV)	43.9	25.6	0	1.2	4.9	1.2	7.3	1.2

Diversity

Table 7 shows that, in average, vertical diversity is slightly higher in the public channels (38.6) than in the commercial channels (31.7) (H3). In the national level, in 9 countries, public channels also show a higher index of diversity than their commercial competitors. The exceptions are Austria, Belgium, Greece, Italy and Spain, where commercial channels present a more varied offer to the audience.

The highest indices of diversity in the public sector are found in Denmark (55.8), UK (53.8) and Portugal (50.0). The lowest indices are those of Greece (12.2), and Italy (25.7). In the case of Greece's ET1, the low index of diversity is related to a high percentage of documentaries (59.2%). The public channels of Italy (RAI1) has a relatively high percentages of daily news in their prime-time schedule (38.4%), which can explain the low index of diversity.

Among the commercial channels, the lowest indices appear in Ireland (10.3) and Portugal (11.6). In both countries, the index is related to a high dependence on fiction series.

Table 7. Index of vertical diversity in prime-time programming (2003-2004)

	Public channels	**Private channels**
Austria	34.9	47.2
Belgium	32.5	37.2
Denmark	55.8	29.7
Finland	39.6	32.1
France	30.5	27.3
Germany	32.1	27.9
Greece	12.2	41.4
Ireland	44.0	10.3
Italy	25.7	46.2
Netherlands	49.1	26.6
Portugal	50.0	11.6
Spain	38.6	53.9
Sweden	41.9	29.7
UK	53.8	23.2
Average	38.6	31.7

The comparison of public funding, market share and index of diversity of the public channels in 2004 (table 8), does not lead to any clear conclusion, although in some cases there seams to be certain relationship. For example, Finland is the country with the highest index of diversity (56.2) and is also the country with the highest percentage of public funding (100%) and the highest market share (70.9%). However, in other countries, high levels of public funding and/or market shares correspond to low indices of diversity.

Table 8. Public funding, market share and index of vertical diversity of public channels (2004)

	% public funding	% market share	Index of diversity
Austria	39	51.4	50.4
Belgium	70	29.8	42.1
Denmark	100	70.9	56.2
Finland	98	43.3	37.9
France	63	46.4	48.0
Germany	77	44.4	31.7
Greece	95	14.1	22.5
Ireland	60	40.3	45.4
Italy	50	48.6	36.8
Netherlands	66	34.4	49.1
Portugal	50	28.8	50.0
Spain	48 (*)	48.8	38.2
Sweden	60	40.1	42.6
UK	86	46.2	46.0

Source: European Audiovisual Observatory (Yearbook 2004)/authors own research
(*) Author's own elaboration with data from rtve (www.rtve.es/informe/10.html)

Conclusion

As we have shown, the panorama of European television is complex and diverse. As far as the role of public television is concerned, there are relevant differences among countries. Although some national data can be of interest, the present research must be regarded as a general picture of the situation in the continent.

The comparison of schedules among different countries shows that the most frequent programming categories are relatively similar in most channels. The output of European television, as a whole, is strongly oriented towards entertainment, with fiction and light entertainment being the two main content categories. Information is also significant, although it is in the third place, at a considerable distance from the other two.

The total output figures resemble some differences among public and commercial channels, since fiction takes a larger share in commercial channels. News are equally important for public and commercial channels. Although news can get relatively high audience figures, this can also be interpreted as an evidence of the fact that programming strategies of the channels take into account several criteria, among which the need for legitimisation is of great importance.

Entertainment is also the dominant purpose in prime-time. Information and infotainment keep a significant share, whereas educational programming is a marginal content. In this slot, some differences between public and commercial channels are clearly reflected in the results of this study. The main one is that the commercial sector is more strongly oriented towards entertainment, whereas the public sector broadcasts a more balanced proportion between information and entertainment.

The distribution of genres confirms this statement, since public channels broadcast clearly less fiction series (the first programming genre) and less reality shows. Nevertheless, sports are more frequent in public channels, since they own the rights to the most popular events.

No clear relationship can be established among diversity, market share and advertising income of public channels. This points towards the complexity of the European television system, in which the strategy of the public sector must be interpreted not only in view of the market situation of each country, but also considering other factor of a social, political and organizational nature.

Information is a more frequent purpose in the public sector than in the commercial sector. However, the breakdown of genres shows that the commercial channels broadcast even more daily news than the public channels, although the difference is very small. This reinforces the role of this genre for the legitimisation of the commercial channels. Documentaries are significantly more frequent in the public channels, and they stand as one of the main differences among both sectors.

In some countries, high levels of daily news in the public channels are associated to high levels in its commercial competitor, which can interpreted as a signal of convergence of the commercial sector toward the public sector. However, the relationship can not be established in all the countries.

In the European level, diversity is higher in the public sector than in the commercial sector. Nevertheless, in most countries, the distance is relatively small and it is relevant to notice that in three countries diversity is even higher in the commercial channel.

The analysis of the results of this study points towards contradictory directions. On the one hand, some of them suggest the existence of several relatively significant differences between both sectors, as far as level of entertainment is concerned. But, on the other hand, data regarding level of information and diversity suggest that programming strategies of public television are quite similar to those of commercial television.

According to the empirical evidence presented in this study, European public television seems to have already reached a significant level of commercialisation, where differences with commercial television are, in general, relatively small. Nevertheless, the remaining differences with the public sector, can still provide a certain basis for the legitimisation of their role as public broadcasters. Differences should be reinforced, in order to ensure a strong position of public broadcasters in the European society.

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