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Positioning Public Service Broadcasting in a Competitive TV Market: Small Country Programming Strategies based on a Wide-Reach Genre^{*}

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Abstract — *This article explores how a public service broadcasting company, namely ORF in Austria, has dealt with the challenges created by the dual system. An investigation of market requirements, public programming mandate, cost structure and financing needs reveals how economic and political constraints are interrelated. To illustrate this phenomenon, we focus on programming, specifically on the highly successful genre of popular folksy music ('Volkstümliche Musik'). Opinions of decision-makers responsible for programming strategies at the Austrian PSB company are linked with a detailed empirical analysis of one prosperous production within that genre. This enables us to draw a number of conclusions on the strategies pursued by public service broadcasting companies to master the changed market conditions and draw attention to so far unattended topics.*

Keywords: mass media; program supply; publicly provided goods; competitive TV market

JEL-Classification: H44; L32; L43; L82; M21

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1 Introduction

Public Service Broadcasters are experiencing hard times these days. They get attacked for collecting license fees and not mastering them sufficiently, and they are under attack for not being distinctly different to private TV stations.

Not to the least are public service broadcasters characterized by their special legal status. Their autonomous financing (partially) from fees gives them the leeway they need for programming. How they use this leeway is defined by the mandate imposed on Public Service Broadcasting (PSB) by public law. What chances do public service broadcasters have to compete successfully against other television stations in such a setting? Especially in the context of market deregulation towards a dual system and the corresponding changes, this question arises. Will public service broadcasters succeed in satisfying specific demands that cannot be covered by private broadcasters in the setting of a dual system or will the profiles of public service broadcasters and private broadcast providers increasingly converge? The significance of this question results from the fact that financing from license fees can only be justified if PSBs cover tasks that serve the public interest and cannot be met by private broadcasters.

The question how PSBs should act to compete with private providers has been dealt with in depth in the relevant literature. This discussion is not a recent phenomenon, but has been underway for several decades. Do we find differences between PSBs and private TV stations, and if yes, what are their specific features? While at the beginning of the 1990s, Blumler (1992) for example, wrote about the “vulnerable values of the public interest” in the context of PSBs, for Herman (1993), the positive external effects of PSBs compared to the US TV system were evident. By contrast, Kiefer (1996) argued that public service broadcasting and private stations could not be compared directly and were not direct competitors, because they served different purposes.

The outcomes of the social and media policy upheavals of the 1980s included the pressure created on PSBs to justify their existence and the question of which strategy PSBs should – and would be able to – pursue in programming (Dahlgren, 2000; Hujanen 2000). Since the introduction of the dual system, a discussion has been underway of whether or not the differences between public service broadcasting and the private stations will diminish. Investigations of this subject are often based on an analysis of the programming structure before and after the opening up for commercial broadcasting. Tsourvakas (2004), for example, concludes that competition among public and private channels leads to an increase

of similar television programs. Conversely, Meier (2003) argues that in the case of ZDF (a German PSB), competition has unquestionably strengthened the PSB's focus on information supply. He criticizes the model of program choice developed by Steiner (1952), which is heavily inspired by the convergence hypothesis. Steiner's model does not take into account the relevance of programming costs and the different institutional environments of broadcasting organizations. It is the configuration of political, organizational and market factors that forces PSBs to devote a remarkable share of their program to informational content.

Our article introduces new aspects to the discussion by analyzing the positioning of PSBs vis-à-vis private stations based on genre rather than on programming structure. The genre analyzed here is 'Volkstümliche Musik' (note: A term not to be translated easily, we consider "popular folksy music" the most accurate; a detailed characterization is given in Chapter 3). 'Volkstümliche Musik', part of the German-speaking television broadcasting since the early 1980s, has been an impressive success story. Nonetheless, this entertainment genre is produced and broadcasted on PSB channels only.

Precisely this successful genre will be investigated from the Austrian perspective in this paper. The changes and challenges that the dual system has given rise to will be investigated based on the Austrian PSB (called Oesterreichischer Rundfunk Fernsehen, in short ORF). Changed market conditions have made it harder, but also more important to differentiate oneself from competitors; the options and instruments available to ORF are discussed in this paper using the example of 'Volkstümliche Musik'.¹

2 The Impact of Changed Market Conditions on Public Service Broadcasters

A look at the development of the European television market in the past decades (i.e. in the period in which our case study, 'Musikantenstadl', was broadcast) shows the eminent importance of the transition to the dual system that started in the 1980s. Up until then, public service broadcasting predominated. In the 1980s, when the first EU Directive "Television without Frontiers" was drafted and passed (1989), some national markets were opened for private TV providers. This process had already taken place on the major markets before the EU-wide re-regulation. In small countries, "Television without Frontiers" was often implemented with a considerable delay. This regulatory market opening in conjunction with

¹ Some of the findings are based on expert interviews with decision-makers of ORF conducted within the scope of the research project "'Musikantenstadl' im Lichte der Wissenschaften" on the Austrian Academy of Science. A list of the relevant interview partners and their functions is given in Appendix I.

technical changes and a higher volume of advertising (which made it seem more lucrative to provide private TV) encouraged the emergence of the ‘dual system’.

Taking a closer look at the effects of the changed market conditions on PSB, three aspects are particularly noteworthy from a socio-economic perspective: First, the changing competition situation for the TV stations, second the shift in financing requirements, and third, the frequent and controversial issue of the standardization of products (Grisold, 2004).

Competition in Austrian Broadcasting

Let us draw our attention to the subject of our analysis: the Austrian television market. Within Europe, Austria has a rather special position as regards television. On the one hand, the number of households that have gained access to mostly German programs via satellite or cable connections has risen considerably since the beginning of the 1980s, and on the other, Austria is the European laggard in the introduction of nation-wide private television. For small countries – especially those surrounded by a larger market using the same language – securing a strong public service broadcasting station with a diverse domestic programming is a welcome media policy strategy. And it has to be clear that a market opening – driven by technological factors - took place long before the European Union requirements to deregulate when Austria joined in 1995. Thus, competition has existed since the early days of television and came from the large neighboring country of Germany, first through ‘terrestrial overspill’, and later through cable and satellite diffusion together with the early opening-up of the market next door for private broadcasters. The increasing competition resulting from mainly German commercial private stations inevitably led to an increase of market economization and a commercialization of the programming structures.

Television in Austria was long considered impossible to open for competition: The market of eight million inhabitants is not large enough to ensure profitability; therefore not many potential investors in private television stations were to be found, nor are there many now. The big overspill from Germany plus the possibility of cable and satellite reception reinforces this tendency. However, there were a few that insisted on the privatization of ORF, mainly big publishing houses opted for private competition.

When Austria joined the EU in 1995, this did not have any immediate direct effect on Austria’s television landscape, but rather an indirect one. Austria’s accession to the European Union entailed the necessity to deregulate the markets for broadcasting as well. This created a dynamic on the radio market that led to a wide range of stations, but not to any variety of the content supplied; in the TV sector, one cannot even speak of a variety of stations. In Austria

today, the public service broadcasting station, ORF, has two general theme TV channels with full programming plus a sports, tourism and weather channel called TW1. In the sector of private providers there is one TV station with national reach ('ATV plus'), a few regional private TV stations and even less agglomeration broadcasters in the three larger cities.

In considering the prospects for competition in the television sector in Austria, we have to distinguish between two different aspects or market definitions. First, in terms of domestic competition, ORF's leading oligopolistic situation still remains. Second, in terms of competition between Austrian and foreign-based services, this form of competition has existed for decades and it has been shown that the "home advantage" of the Austrian PSB channels cannot be eliminated that easily, but is on the decline. The percentage of households with cable and satellite has grown steadily from the 1980s onwards. By the end of 2006, (in brackets: data for 1997) 88% (70%) of all households with TV sets had either cable or a satellite dish or both (URL 2). However, the ORF still has a rather high market share, especially in the prime time slot and for information programs. The market share of the two ORF channels was 48% in 2006 (1997: 62%),² the nationwide private TV station 'ATV plus' has a market share of 3%, while the market share of all foreign stations together is 49% (1997: 38%) (URL 2).

As regards the theme of this article, the question arises of how ORF positions itself in a competitive market vis-à-vis the Austrian private TV station as well as the many German public and private TV stations. This positioning is achieved through programming. Not necessarily does competition mean a bigger variety of programs. Quite to the contrary, fierce competition among television stations may also lead to imitation, namely, to copying the successful formats of other stations and thus, generally, to follow and join already established programs. This type of competition is also found within the genre under scrutiny ('Volkstümliche Musik'). The race for the highest number of viewers in a genre that is the exclusive domain of public service broadcasting stations creates fierce competition among them. Werner Taibon, head of ORF program scheduling, describes this competition as follows:

"Concentration and/or the growth at all costs means, above all, expensive shows and competition also among the two German broadcasting stations ARD and ZDF as to which has the more successful programs: is it "Carmen Nebel" or is it "Feste der Volksmusik" (Note: Both are successful 'Volkstümliche Musik' programs produced by German PSBs)“.

When ARD broadcasts "Feste der Volksmusik", ORF comes under pressure, and there is a risk that many viewers will switch to the German public service broadcasting competitor

² In 2005, ORF had the second largest market share of all public broadcasters in Europe (48%, the largest are in Denmark with 68.5%).

ARD. Werner Taibon describes this dilemma for ORF: “I try to counter this move with programming, but cannot offer a program of this size ... then, 250,000 to 300,000 viewers switch stations, which is a lot, especially on a Saturday.” In this case, ORF responded to this competition in the year 2006 by cooperating and taking over the program, by joining “Feste der Volksmusik” as co-producer. Apart from the competition between PSBs there is also competition between the genres (content) within a station or a family of stations. These types of competition are hardly addressed in academic research literature. It refers to questions like, which program is given a good time slot, and what needs to be done to keep it? The more prominent the time slot, the greater the reach criteria and targets of the TV station. Ursula Stiedl, head of music at ORF, stressed the specific competition between genres as regards broadcasting times:

“Very strong competition always comes from crime series playing somewhere else, apparently this is a big trend now. We know this, but it does not relieve us from the task of making a greater effort. We have to find out: What can be included in the show? What marketing mechanisms can be used in advance?”

To conclude, the example of ‘Volkstümliche Musik’ shows: If a genre is successful, a competitive environment is created regardless of private TV stations being involved.

Financing Requirements

Ever since the introduction of the dual system and of cable and satellite technology, the public service broadcasting stations have been struggling with financial difficulties. To reduce the programming costs, many PSBs have cut the number of employees and increased the centralization of decision-making processes as well as increasing their entrepreneurial activities (sale of programming, sale of ancillary products) and investments in co-productions.

The Austrian PSB, ORF, is largely financed by fees (51%) as well as by revenues from advertising (34%). The remaining parts are other revenues such as program sales. Income from advertising fluctuates more strongly than revenues from fees: Prior to the introduction of the national private TV station (‘ATV plus’) and the Austrian advertising windows in the German private stations, and at times of higher economic growth, ORF’s revenues from advertising accounted for 50% of total revenues, now the percentage has declined to the already mentioned 34%.

One possible strategy pursued by ORF is to enlarge advertising times (these are regulated by law). The more successful they are in doing so, the more they lose an important distinctive

feature for viewers compared to private TV stations. ORF still has relatively few commercial breaks compared to 'ATV plus' and the private German TV stations, even though ORF has traditionally been granted more advertising time than the German public service broadcasting stations, and these have even more than the classical BBC stations.

ORF – just like the public service broadcasting stations ARD and ZDF in Germany – has been accused of following the orientation of private stations, and this allegation is not unfounded at all: What is noticeable in any case is the increasing uniformity of the program formats.

Standardization of Products?

The irony of the frequently mentioned mechanism - that a sharp increase in the number of broadcasting stations results in a narrowing of the programming content, in a standardization or even the use of templates - can be argued at various levels. More TV stations mean more competition in the market for advertising and this means cheaper advertising slots. Thus, some stations are forced to either drastically increase their advertising times or to accept lower advertising revenues, which in turn means less disposable income for programming. With the growing number of TV stations, program duplication will continue to be more cost-efficient than the production of new one (see below). This results in a program selection process that is biased against minority programs. The most distinctive tendency is described as "more of the same". It results in more broadcasting stations offering the same fare, as was argued by representatives of U.S. TV economics already in the 1970s. Commercial stations have the incentive to offer programs that maximize reach. This results in the airing of similar programs on all channels, which has been referred to as the "lowest common denominator". At the entrepreneurial decision-making level, the importance of expectations and assumptions of what audiences are interested in leads to standardized productions (Grisold, 2004).

Empirical findings have shown that an increased number of TV stations do not necessarily correspond with additional program offerings. From an economic perspective the reasons for this development are: first, programs are not exhausted when consumed, second, home productions are more expensive than acquired programs (for TV drama and documentaries, not for low-cost productions like game shows), and third, products with a high market share cannot be augmented arbitrarily (e.g. for sport broadcasts - prices have risen exorbitantly, therefore stations with lower reaches or smaller market sizes can hardly afford them any more).

The managing director of ORF Marketing, Walter Zinggl, describes this phenomenon as follows:

“It is now a fact that the greater number of stations, which has kept format portfolios from growing, means that everyone is more or less sitting on the same products. There are many detective series, and there are movies that you can watch practically every day on some channel. I am sure that in the German-speaking region, you can watch ‘Pretty Woman’ at least twice a month because the format works well every time. This has less to do with the TV stations, and more with the fact that there are constantly more [TV stations] and you can only increase ‘content’ to a limited extent.”

The quantitative increase in the number of broadcasting stations does not necessarily coincide with a broad supply (and in no case automatically or due to market forces), more diversity, and differences in the stations and programs, but can also result in the opposite effect. One could describe the development polemically: uniformity instead of diversity. This raises issues that were analyzed with unrivalled sharp criticism by the Frankfurt School (Horkheimer and Adorno 1947, 1998). According to the critique, the standardized mass goods of the culture industries serve the sole purpose of manipulative formation of an uncritical consumer-oriented mass consciousness.

3 Changed Market Conditions and the Importance of the Wide Reach Genre ‘Volkstümliche Musik’ for ORF

The pioneering and most prominent format of ‘Volkstümliche Musik’ is called ‘Musikantenstadl’. The first ‘Musikantenstadl’ was broadcast on ORF in 1981. It was aired around five times a year. Ever since, i.e. for more than 25 years (!), ‘Musikantenstadl’ has been an important element of ORF’s programming. However, ‘Musikantenstadl’, originally an Austria production, is not an exclusively Austrian success story. Since 1984, it has also been broadcasted in Germany. The program tours Germany, Austria, Switzerland and South Tyrol. The producer is ORF, for many years now in collaboration with the German ARD and Swiss TV (both PSBs). Particularly popular were the shows produced abroad. Together with the broadcasting companies of the respective countries, ‘Musikantenstadl’ has been broadcast from Portoroz (Slovenia, 1985), Moscow (UDSSR, 1988), Toronto (Canada, 1994), Melbourne (Australia, 1995), Cape Town (South Africa, 1996), Orlando (USA, 1998), Peking (China, 1999), Caribbean (2001) and Dubai (2001). The broadcast of ‘Musikantenstadl’ from

Moscow was viewed by 245 million people in the Soviet Union and some 2.8 million in Austria (Mang, 2004: 65-78).

On 'Musikantenstadl' music and dancing troupes perform before an audience in a large hall. The program is broadcast live and is moderated by an entertainer. Artists are frequently dressed in traditional Alpine costumes such as 'Trachten' and 'Dirndl' (Obermüller 1995). The rural flair is enhanced by the stage setting which is designed to look like a barn (in German, 'Stadl' means barn, thus the name 'Musikantenstadl'). The "beautiful homeland" is used to create a romanticized illusion and is part of the staging of a wholesome world. Needless to say, the songs are practically all sung in German. The entire setting of the program is aimed at creating a harmonious and collective mood in the hall and among the audience watching the show on home TV.

The producers explain the success of the program by the effect of the music. It is "clearly an incredibly important transmission belt that addresses the emotions of the audience" (Edgar Böhm, director of the ORF entertainment department). This makes it possible for 'Musikantenstadl' to address the audience in a special manner: "Befriending is the wrong expression; it is more like a very strong melting together, an identification" (Edgar Böhm). The function of the program consists of "complete relaxation for an entire evening, engaging in full escapism" (Werner Taibon, head of program scheduling).

'Musikantenstadl', just like other programs with 'Volkstümliche Musik', has been very controversial since its inception (Binder and Fartacek, 2006). It is criticized that the music is repetitive and always deals with the same themes. The program creates the illusion of a conservative, wholesome world. It thus avoids any critical treatment of one's own experiences and problems. A Tyrolean art photographer who fights the tourism industry's tendency of turning the Alps into kitsch caustically describes 'Volkstümliche Musik' as a "pacifier for an infantile society" and as the "business of making money on the desires and emotional deficits of people" (Diaconu, 2006: 208-9). Besides the severe critique, producers argue that 'Volkstümliche Musik' is part of the public service broadcasting mandate.

The audience success of 'Musikantenstadl' has been impressive since its start (Obermüller 1992). In the first three years of existence (1981-1984), the number of viewers in Austria was over 3 million (at a total population of 7.6 million at the time). Despite a slow, but steadily declining interest of the public and the emergence of many different, similar programs, 'Musikantenstadl' has remained on the air until today. It reaches more viewers than the

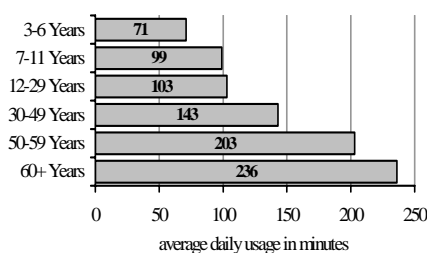
average of all programs broadcast on Saturday prime time. High viewing quotas and market shares raise the question why private TV stations don't seem to be interested in 'Volkstümliche Musik'.

Since the middle of the 1980s, new programs with 'Volkstümliche Musik' have emerged on PSB-stations. Thus, in addition to 'Musikantenstadl' there are many similar and supplementary programs in the German-speaking region today that are referred to collectively as 'Volkstümliche Musik'. In 2004, ORF broadcasted over 40 such programs (in some 10 different formats) on the prime time slot on weekends. The regional public service broadcasters in Germany broadcast over 100 regional programs with 'Volkstümliche Musik'. 'Musikantenstadl', and 'Volkstümliche Musik' in general, raise some defying questions which deserve further consideration. The first asks for the reason of its amazing audience success, the second regards the behaviour of private TV stations, which ignore this genre completely. Third, the rationale for the increase in formats and broadcasts since the 1980ies is analysed, and fourth we ask whether this genre fits the public broadcasting mandate.

The audience of 'Musikantenstadl'

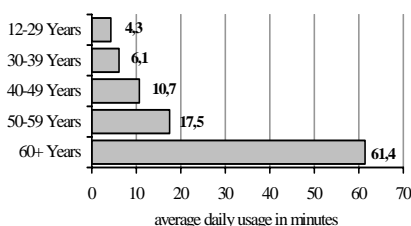
'Musikantenstadl' addresses those target groups that - due to their viewing behavior - make it possible to achieve high rates of reach and market shares. This is revealed by the comparison of the television viewing data of the entire TV population and the television viewing data of the audience of 'Musikantenstadl'.

Figure 1: TV usage 2004 in Austria by age group



Source: URL1

Figure 2: Audience shares of 'Musikantenstadl' by age group 2004 in %



Source: ORF Mediaresearch 2006

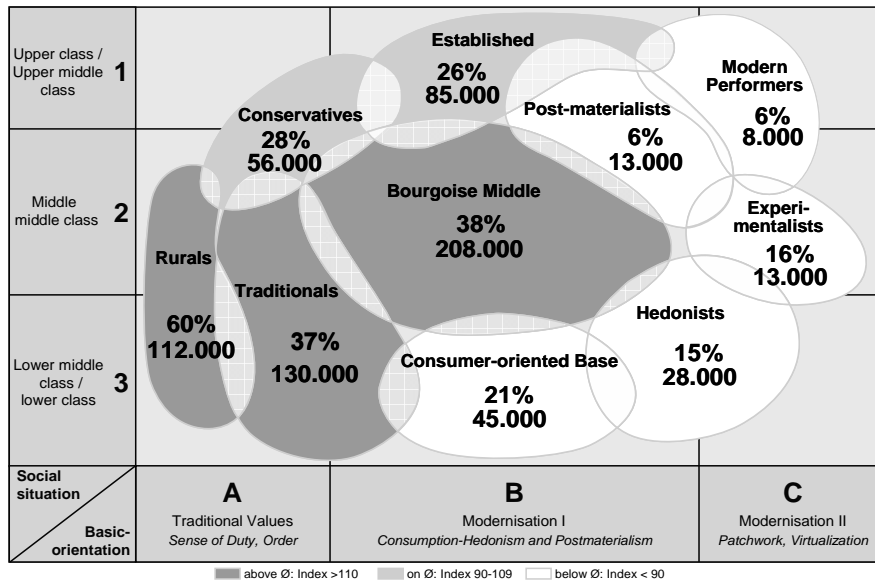
The age group of over-60-year olds view television on average more than twice as much (2.3-times as much) as the age group 12 to 29-year olds. If one compares the television viewing times by age group (Figure 1) with the age structure of the audience of 'Musikantenstadl' (Figure 2), it becomes clear that those people who watch a lot of television account for a very high share of the audience. The share of over-60-year olds in the audience of 'Musikantenstadl' is more than 14 times as high as the share of 12 to 29-year-olds. The other programs of the genre 'Volkstümliche Musik' have a similar audience structure.

There are significant differences in television viewing behavior not only by age, but also by gender. In the year 2004, Austrian women watched television 180 minutes on average, which is over half an hour longer than men (147 minutes). These viewing times correspond to a ratio of 55:45 (women to men). In 2004, the audience ratio of 'Musikantenstadl' between women and men was 60:40.

As regards the age structure as well as the gender ratios, the TV audience of 'Musikantenstadl' reveals the existing differences in television viewing behavior very clearly. By addressing an important TV target group, 'Volkstümliche Musik' creates the foundation for the impressive success among viewers.

But demographic models alone are not considered sufficient to serve as basis for researching the television audience. ORF uses what is called 'Sinus Milieus' to obtain a clearer picture of the audience and its divergent interests and television viewing habits. This instrument is also used by German TV stations (both PSBs as well as private) (URL 3). The Sinus Milieu method groups the Austrian TV population by the categories of basic orientation and social situation. Every group's (milieu's) share of the total population is shown in the "potato" chart (Figure 3) (detailed information is available on the internet, URL 1). In 2004, the milieu 'bourgeois middle' (Bürgerliche Mitte) was by far the largest (19%), followed by the milieus 'established' (Etablierte) with a share of 13% of the TV-viewing population and 'traditionals' (Traditionelle) with 12%. The bourgeois middle is not only the milieu with the largest TV-viewing population; this group watches the most TV: on average 197 minutes per day. This is almost half an hour longer than the average of the entire TV-viewing population. 'Conservatives' (Konservative) watch TV on average 181 minutes per day and rank second.

Figure 3: Sinus Milieus of 'Musikantenstadl' in 2004



Source: ORF Mediaresearch 2006

In 2004, 'Musikantenstadl' recorded a market share of 28%. The %-figures within each potato show the market share of the respective milieu. Gray levels serve as orientation. They show which milieus view 'Musikantenstadl' at an above average rate (dark, far above 28% market share), average (light, approx. 28% market share) or below average (white, far below 28% market share). 'Musikantenstadl' was very popular in the milieus 'rurals, bourgoise middle' and 'traditionals'. It even attained a market share of 60% in the milieu 'rurals'. The percentages for 'bourgoise middle' (38% market share) and 'traditionals' (37% market share) are also very high. The milieus on the right side of the chart are heavily underrepresented. These are mostly younger age groups with lower rates of TV viewing.

Thus, the differences in the viewing behavior of the general television audience are revealed to be even more pronounced within the 'Musikantenstadl' (and other programs with 'Volkstümliche Musik'), as shown in figure 3. The historical development of 'Volkstümliche Musik' and the analysis of the current structure of the audience make it clear how important 'Volkstümliche Musik' is for ORF's market position.

Private TV Stations and 'Volkstümliche Musik'

'Musikantenstadl' is an entertainment offering with a broad reach that essentially should also meet the marketing interests of private stations. Nonetheless, no private stations have produced such programs in the past nor do they do so today. A possible answer to this paradox situation was supplied by the director of the entertainment department of ORF. When

asked about the reason why ORF does not outsource the ‘Volkstümliche Musik’ programs, but produces these itself, Edgar Böhm answered:

“In those cases where expensive television technology is required, i.e., multi camera technology, broadcast vans, studios with equipment that a private producer cannot afford, such producers will never be able to take on such a large number of productions to finance these on its own. For example, our Studio 1, where we produce Dancing Stars - no private station can afford this and this is why we produce it. ... Therefore, even such programs like the New Years Concert will always be produced by a public service broadcaster.”

The argument that private production firms do not have the expensive technical facilities is true especially for small countries like Austria. The same argument may be transposed to private TV stations. They hardly have any possibilities of covering the high fixed costs of such equipment. In this respect, public service broadcasters have a natural monopoly over certain genres. Even though this argument does not apply to large countries like Germany, the second argument applies in general: The audience that watches ‘Volkstümliche Musik’ is an aged group that is not classified as attractive by private TV stations, which typically focus on the age group 12 to 49.

Another argument for the complementarities of PSBs and private stations refers to the programming content. The public service broadcasting mandate of the ORF requires the production of “differentiated overall programming”. This means that all genres appropriate for the medium of television should be taken into consideration in the programming (full range supplier). By contrast, a private television station may specialize in an individual genre, sector (sector station) or restrict itself to an arbitrary mix of genres and thus create a profile for the station.³ For ORF, it is impossible to imagine ‘Volkstümliche Musik’ not being part of the programming. According to Walter Zinggl, the CEO of ORF marketing, its contribution to securing the market share and thus to earning advertising revenues cannot be valued high enough:

“For a supplier of full range programming like ORF it is clear that the aim is to find the right mix. To eliminate ‘Volkstümliche Musik’ completely from the program would probably be a similar task like, let’s say, cooking goulash without onions. What I mean is that it is possible, but it is hard and tastes terrible.”⁴

³ With the exception of the statutory prescribed information content for private general theme TV stations (for example in Germany: Dreyer 2006).

⁴ And every recipe for goulash, this Hungarian-based Austrian dish, starts with: lots of chopped onions, ...

Therefore, in order to be able to answer the question of why ‘Volkstümliche Musik’ is aired only by PSBs, it is not sufficient to analyze this genre exclusively. The overall structure of the programming is an important feature that must be taken into account. Not only the individual programming elements, but also their harmonization with each other are characteristic of the image of a station and are able to create loyalty to a station among viewers. To cook a good meal you need the right ingredients and a good recipe. Too much or too little of one ingredient can change the character of a meal just like an ingredient that does not match.

The Omnipresence of ‘Volkstümliche Musik’ at PSBs

The fact that ORF broadcasts ‘Volkstümliche Musik’ can be explained in terms of financial requirements as well as by the programming mandate. Whether and why there are around 10 different formats and over 40 main programs with ‘Volkstümliche Musik’ is a further question. The spread of ‘Volkstümliche Musik’ among the PSBs in Germany is even more impressive. In addition to the PSBs with nationwide reach (ARD and ZDF), local PSBs produce over 100 programs with ‘Volkstümliche Musik’. The head of ORF marketing explains this development with the increasingly broader media landscape. One could just as well watch a detective program every day on some channel. A critical number of programs and a certain degree of standardization seem to be necessary to put a specific genre into a TV profile, a “trademark” that reaches far beyond the individual stations in a market for “regular customers”. Not so much the technology, but for sure the primacy of economics (economic necessities) can be seen here, albeit in another way than predicted by the Frankfurt school: TV stations are on a constant search for ‘reliable’ audiences, and they find those through a further standardization of the programming structure.

A detailed analysis of audiences (Fellner, 2006) reveals that different formats of ‘Volkstümliche Musik’ have a very similar audience structure. This finding leads one to conclude that more programs with ‘Volkstümliche Musik’ are beneficial for the entire genre, because the audience of these programs is more loyal due to the regular supply with the genre. This view was confirmed many times in the interviews conducted.

“They [‘Volkstümliche Musik’ programs] in their entirety create a very reliable basic service for this audience. If just like in the beginning, ‘Musikantenstadl’ were to be broadcast 5 times a year and there were no other programming of this genre, then no regular loyal audience – as regards habits – would have been able to emerge from these eight events. If intended to do so, one could watch a program with popular folksy music every day.” (Edgar Böhm, director of the entertainment department)

Apart from the complementarities mentioned, there is also competition among the formats (and genres), as explained above. Genres must prevail in the struggle for positioning within stations and programs of one genre fight for their ranking within a genre. Cooperation and competition form an unusual symbiosis in this case.

Public Service Broadcasting Mandate and ‘Volkstümliche Musik’

A share of 51% of ORF’s financing came from broadcasting fees in 2006. The legal requirements imposed on the programming based on such fees are regulated in the ORF Act. The programming mandate (§4) states 18 criteria regarding the content of the programming. Apart from comprehensive information of the general public and the presentation of art, culture and science, entertainment is dealt with in a separate item. Afterwards, the definitions of how the 18 criteria of the programming mandate are to be implemented in an overall program are given.

“In the fulfillment of its mandate, the Austrian broadcasting service shall provide a differentiated overall program comprising information, culture, entertainment, and sports for everyone. The offering shall be oriented on the ‘diversity of interests of the entire listening and viewing public’ and ensure a balance of the diverse interests.” (Note: Highlighting by authors)

Based on the statutory provisions, the question arises of whether ‘Volkstümliche Musik’ can be understood as a contribution to the fulfillment of the public service broadcasting mandate. ‘Musikantenstadl’ is produced by the entertainment department of ORF. The director of this department considers the attainment of higher viewing quotas as the primary task of his department. Entertainment has the function of “attracting viewers to the station and keeping them”. According to him, a high quota is not an absolute criterion but a relative one. In line with the programming mandate, a differentiated program for “everyone” is to be offered.

„... when we are creating a program, we define the target group in advance and in this segment the program must have success, it must achieve a wide reach. Otherwise, we have made a mistake and have spent money on the wrong thing, on something that no one is interested in, because we receive the money mainly from listeners and viewers through license fees.” (Edgar Böhm, director of the entertainment department)

This program “for everyone” includes entertainment programs for large target groups (‘Musikantenstadl’) as well as programs for small, commercially unattractive groups. As regards programs with a broad reach, one might also argue that these could be offered by private stations too. Then PSBs would only have to target commercially unattractive target groups. Apart from the fact that the Broadcasting Act calls for an overall program for

everyone, the example of ‘Musikantenstadl’ shows that a program with a very wide reach is not necessarily offered by private stations in any case: ‘Volkstümliche Musik’ is produced by PSBs only.

In addition to the argument that a program for all interest groups (young and old) is to be produced, the question is also addressed of how the programs offered are designed and are understood as part of the public mandate. From the ORF management, this is rationalized as follows:

“For us public service broadcasting companies, entertainment also has to do with attitude. We want the image of people depicted and conveyed to be one of a humanistic understanding of people, i.e., a fundamentally humanistic attitude, a democratic stance that matches our constitution and average tastes.“ (Edgar Böhm, director of the entertainment department)

For such genres that make it possible to compare PSBs and private stations, the representatives of ORF argue with higher quality aspirations on programs: “Doing the same differently” is the motto. The argument often cited in interviews with ORF representatives is that ORF as a PSB has particularly high moral aspirations in its programming (and must do so due to their programming mandate).⁵

4 Conclusion

The introduction of the dual system in the TV sector and the resultant changes have raised the question as to the role and positioning of PSBs. From a socioeconomic point of view, the three principal impacts caused by changed market conditions were enhanced competition, the more difficult financing of broadcasting services and the related increase in the standardization of the products. The rising number of TV stations as well as the competition for attention and advertising revenues makes it necessary to differentiate oneself from competitors. At the same time, this differentiation is becoming increasingly harder, if due to lacking revenues, expensive home productions have to be replaced by standardized “mass goods”. Before this backdrop, the stations are forced to create specific profiles for themselves and become established as “trademarks”. A major instrument of ORF in this context is its technical equipment. It permits to produce technically expensive productions like ‘Volkstümliche Musik’ or major sports events, and is the only station in the country that can do so.

⁵ In Summer 2007, this ethical argument was made when ZDF and ARD ceased the broadcasting of the Tour de France after another case of doping in the German team (e.g. Spiegel online of 18 July 2007).

However, also in Germany, where private stations would have the technical and financial possibilities to produce such programs, ‘Volkstümliche Musik’ is produced only by PSBs. The success story of ‘Volkstümliche Musik’ on television, as illustrated by the example of ‘Musikantenstadl’ in this paper, is impressive. Still, private stations do not show any interest in producing this genre. ORF by contrast considers ‘Volkstümliche Musik’ as part of its public service broadcasting mandate. This calls for a differentiated overall programming that takes the diversity of interests of all listeners and viewers into consideration. Irrespective of the moral aspirations as regards contents, the public service broadcasting mandate in the case of ‘Volkstümliche Musik’ is a differentiating feature vis-à-vis other stations. It should be mentioned at this point that – as shown by analyses of the audience - ‘Volkstümliche Musik’ contributes substantially to securing ORF’s market position due to its broad reach and specific audience composition.

One of the key reasons for the creation of the dual system was the demand for competition. In the debate on convergence, competition is understood almost exclusively as competition between public service broadcasting and private television stations. The analysis of ‘Volkstümliche Musik’ shows competition at many levels. ORF competes with PSBs in Germany, and within a TV station there is competition between the diverse programs. Genres must prevail in the struggle for positioning within stations, and programs of one genre must fight for their ranking within a genre. In this context, ‘Volkstümliche Musik’ programs as a genre are embedded in a complementary relationship, but as concrete programs they compete.

In summary, it may be said that the developments in the TV sector have increased the significance of ‘Volkstümliche Musik’ for ORF. The analysis of this successful production also shows that the strategies of public service broadcasting companies in the face of changed market requirements are not primarily in the supply of classical public service broadcasting programs such as information or minority programs (the often-cited opera broadcasts), but rather in the entertainment segment. In any case, PSBs are of significance as complementary program suppliers.

The genres have not generally become the same over the years, and for music programs, by no means have PSBs and private TV stations the same program content. As regards the question of “WHAT is being broadcast?”, we did not observe severe convergence, but as regards the question of HOW, we have indeed. With respect to how the programs are designed, there is a clear convergence as far as the offering of a “wholesome world”. Werner

Taibon, head of program scheduling at ORF, describes the programs of 'Volkstümliche Musik' as "a lot of kitsch, one could almost say, a kitsch instrument of style. You have the garden dwarves, the waterfalls and enormous stages, and some trees or a garden with flowers". The standardization of products stated by Critical Theory definitely also applies (and possibly almost ideally) to 'Volkstümliche Musik' programs. Still, these programs can be considered part of the public service broadcasting mandate. High viewing quotas do not secure the private provision of a genre; cost-intensive programs for target groups not attractive to commercial advertising are not provided by private TV stations. Only PSB has the programming mandate and the financial prerequisites to cater this type of program that a large number of people like to watch.

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Appendix I: **Interview partners (ORF)**

Competence levels	Position	Name/Person
'a) Television Programmming'		
Program Scheduling	Head	Werner Taibon
Entertainment Department	Director	Edgar Böhm
Entertainment Department	Head of Music	Ursula Stiedl
Program ('Musikantenstadl')	Screenwriter & moderator	Karl Moik
'b) Televivion and Radio Program marketing'		
CEO	Managing Director	Walter Zinggl

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