VILNIUS UNIVERSITY

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TELEVISION IN A CHANGING WORLD OF MEDIA

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INTRODUCTION

Television studies are a fast growing field constantly gaining popularity. I believe it is important to take popular television seriously – because it has become such an important part of our daily lives, and is playing increasingly important role in our perception of the world. My choice to get involved into this exciting sphere is influenced by two main reasons.

First – there is no doubt that television is one of the dominant branches of media having major impact on perception of the world surrounding us. Despite the rise of Internet, average person (even teenagers) still spends between 3 to 4 hours daily watching television. This is also the time when technological and legislative changes around the globe are re-shaping the way that television landscape looks today – it is a very fascinating timing to do deeper analysis of this media and processes behind it.

Second – my personal professional experience in the field of television and desire to combine this practical, experience with a broader perspective, and more academic approach.

When studying television, there are four most common ways of approaching the subject:

1. In depth studies of content or **texts** of television.
2. The **history** of television and specifics of legal policies defining the landscape of television.
3. Analyzing television as an **institution**, the way it is organized, how it produces and distributes content.
4. Sociological study of television **audiences**.

The field is indeed complex and quite often it becomes difficult to come to exact conclusions, especially when one moves out of analyzing television in the framework of a single country and shifts the focus into cross country comparisons. I am very much aware of this danger and the aim of my work is to combine a broad perspective of television industry with clear, empirically defined models in which television audiences relate to this media.

In my work I do not look into the first point – in depth studies of television content (texts). I feel it is very important to understand the environment in which television was developing in this region – therefore I will briefly cover both the history of television, analysis of television as institution, and the main factors affecting it, before progressing to the main point of my work – sociological analysis of television audiences.

THE ACTUALITY AND SCIENTIFIC NOVELTY OF THE WORK

Television is undergoing key transformation. Average person spends more time watching television than relating to any other type of media. Television in itself is undergoing key technological changes that undoubtedly will modify the current relationship between viewers and this media.

Theories. In my work I cover the key theoretical approaches, which are used when the role of television is analyzed in the context of mass media.

Globalization. I analyze the transformation of television from national into global phenomenon. Creating of "global village" – television as the tool of reducing borders between the states and channels for forming global values.

Region was little analyzed. Most work on television is focused on Western Europe, UK and America. I focus on the Baltic region. Processes taking place here are compared to other countries.

Different roles of television. In the empirical part of this study, I define different ways how audiences relate to television and analyze the social-economic variables that define different models. Analysis is performed using Lithuania as a core country.

THE PROBLEMATICS OF THE SURVEY

One can easily argue that Lithuanian television is facing crossroads today. It is no longer as it was earlier, but at the same time it is not quite clear where it is moving to. The key questions that rise are:

- commercialization of television;
- increasing differentiation of television channels;
- Russification or Americanization of television content;
- the role of the public broadcaster;
- what influences what – viewer's opinion influences television content, or television content influences viewer's opinion.
- The changes that Internet means for traditional media, especially television.

Television in Lithuania – unique situation or common state of media. The best way to understand the situation is to move the research scope to international level. I use neighbor countries for comparison – Latvia and Estonia, as well as Scandinavian countries – Denmark and Norway, which are a counter weight for the representatives of the former Soviet block.

The key problem area of this study is the transformation of the relationship between the television and society. Different ways in which different audiences and groups relate to television. As well as key socio-economic factors that influence the form and content of television in international perspective.

MAIN PARADIGM

The methodology of the empirical part of this dissertation is based on the functionalism paradigm. The work is an empirical study, which is focused on defining external qualities, quantifying them using objective statistical methods and uncovering the phenomena, rules and universal laws having effect on social life.

THE AIM OF THE SURVEY

To analyze the factors affecting the form and content of television. To reveal their impact on the society in general and specific socio-demographic groups inside it. To identify different models of relationship between the viewers and television and to quantify their distribution using quantitative methods.

THE TASKS FOR THE SURVEY

1. To identify the role that television plays in everyday lives and how this role was changing over time.
2. To identify and measure different models in which audiences relate to television within a nation state using empirical methods.
3. To establish different roles that television plays in cross country comparison. To identify the "influence" groups and socio-economic factors that shape these differences.
4. To analyze and measure the process of television globalization in the region. Identify the key globalization agents.
5. To determine the different roles of public broadcaster in different counties and identify the factors that are shaping such relationships.

HYPOTHESES

1. Emergence of "new media" threatens "traditional" medias. The rise and popularity of internet is reducing the importance of television and can replace it in the near future.
2. Television as "traditional" media is only interesting to the old people and rural audiences that have no choice. People that have alternatives to television prefer to do other things instead.
3. Individuals within a nation state tend to relate to television in different ways. The differences are caused by demographic, socio economic and cultural factors.
4. Audiences in different countries interact with television in different ways, which can be differentiated by the parameters of social and economic

significance, audience fragmentation, focus on information vs entertainment, role of public broadcaster as well as dominant demographic group.

5. Television is different in the degrees of involvement and intellectual engagement on the "hot" / less engaging and "cool" / more engaging media axis during different parts of the day and between different countries.
6. The process of television globalization is affecting the countries predominantly in the form of audience fragmentation.
7. The role and the size of public broadcasting is similar in all European countries. Public broadcasters are more focused on cultural mission and therefore appealing to more narrow audiences.

SURVEY METHOD

The work is split into 2 parts:

Part 1 – theoretical – "THE ROLE OF TELEVISION"

Secondary analysis of the works by the main authors working in the area of media. In this part I also cover historical timelines of television development in the region, as well as the overview of key international media groups in relation to the process of media globalization.

Part 2 – empiric – "TELEVISION AND AUDIENCES"

The analysis of TV meter data from different countries is presented here. Focus is on establishing general trends affecting television, identifying and quantifying different models of relationship between television and audiences. Comparative analysis on the domination of such models between different social groups inside individual country. Cross-country analysis focusing on differences of relationship between TV and audiences.

DATA BASE FOR EMPIRICAL SURVEY

The database for empirical survey is formed up from the data of TV meter survey data from the Baltic countries and Scandinavia.

PART 1

THE ROLE OF TELEVISION

"We are passing into a realm where events no longer truly take place,… , where they become lost in the void of news and information"

Jean Baudrillard

TELEVISION DEVELOPMENT IN EUROPE: FROM THE ASHES OF WORLD WAR II TO DIGITAL MULTI CHANNEL ENVIRONMENT

The history of television is directly linked to technological developments of the 20th and 21st century. Television today would hardly be possible without radio – the roots of broadcast media. It was the radio that took a completely technological thing – possibility to transmit voice to remote receivers without using any wires and turned it into a social phenomenon. It was the time after World War I when more and more men and boys were using illegal receivers hidden in their garages to listen in. That was the timing that presented the opportunity for former military technology to make way into the households and created the commercial opportunity for entrepreneurs. Such thinking had a good fit into the social environment of post-war era. It recognized some of the consequences of a newly industrialized and mass democratic society. The public sphere of political debate was invitation-only activity, economy was in recession, USA in particular saw increased waves of immigration, while class divisions were strikingly clear in Britain. In this environment broadcasting presented an opportunity to do something more than just sell a new consumer product (Hilmes, 2003).

Since radio was in principle available to everyone – it equalized the public life – gave broader public access to the events and entertainments that was previously restricted to minority. Radio became a tool to fill in the information gap as well as provide cultural uplift for lump men masses and to unify the nation. Rather soon broadcasting became the tool of social inclusion. Back in 1938 the polls in the USA proved popularity of radio by showing two thirds of population considering radio to be their preferred news source. By that time radio has taken a stronghold within households both in Europe and USA. It became a taken for granted part of everyday life. Next step was television.

The hardware technology for television was already in place as early as 1936. At that time Germany and one year later Britain had established television services. What television failed to achieve was to gain sufficient number of sets in households to become the new center of the home. Though there were two events of major public importance – Berlin Olympics and Coronation of Edward VIII the situation did not change and television technology did not become the new social phenomenon before the outbreak of World War II. In CEE region Poland and Latvia are good examples of offset of television development caused by the outbreak of the war. Poles have started building television network back in 1937, but it was destroyed in the first days of the war after Germany invaded Poland. Since television is not just a technological, but rather social phenomenon and is linked to high degree of regulation – the television broadcasts in Poland were renewed only in 1951. Similar timing was in Latvia, where test broadcasts were also available back in 1937.

Another reason of the delay was the fact that television, as new type of broadcast media, was often the responsibility of radio broadcasters, who in their turn were also likely to see it as a threat. (Smith, 1998)

Both in USA and Europe the real development of television started right after World War II. In USA television was treated both as a consumer item and medium for advertising other consumer items – a vital engine for post-war recovery. Already in 1948 there were 4 networks, 52 stations and close to one million TV sets in the USA. Then the licensing was frozen for 4 years in order to work out the issues with overlapping signal. The content issues were worked out in parallel with Hollywood studios. After this freeze the boost was clear – number of stations increased 10 times to 573 and the number of sets by more than 30 times – 33 million units. Television also was taking 70% of broadcast advertising revenues. Technological issues related to color standards were also resolved after the freeze and NBC introduced the first full color, full time schedule in 1956. By 1960 there were over 650 stations broadcasting in the USA reaching 36.5 million homes (Winston, 1998).

At the same time in post-war Europe black and white television was making progress. In Britain BBC resumed the broadcasts in 1946 and by 1952 there were 3 million receivers in the UK. In 1960 UK abandoned it's original standard and switched to black and white color standard of German origin –

PAL (Phase Alternate Line). Television network in Germany was also expanding. By 1952 Germany completed its northern network. That was also the year when Italy began a five-year plan to cover the nation. (Crisell, 1997)

French started their television project using a different standard of 819 lines. Same standard SECAM was adopted by the Soviet Union and introduced into the countries of the block as well as Cuba.

In other parts of the world Japan, Canada and South America adopted US standard – NTSC. Middle East followed Western European standard – PAL.

I believe that there was also a different social context in post war Europe that facilitated the rise of television. There was a fundamental shift from fixation of mass audiences on politics, that was typical for post World War I Europe, to entertainment. Europe was tired from the hardships of the two wars and economic difficulties of inter war period. Household commodities were in high demand and short supply. The two most popular consumer items were underwear and baby crates. The blue-collar professions were most popular and reflected the need of Europe to re-build from the ashes. In this grey background it was cinema that presented an escape to a different reality. Late forties and early fifties were the flourishing years of cinema, most of which was coming from America. The popularity of Hollywood products in post war Europe was caused by a number of reasons – starting from the viewer demand and ending with successful lobbying of Hollywood studios on the State Department which, in its turn, applied pressure on European governments to reduce the quotas for European movies and let the American films in. After Europeans sorted the immediate post-war needs, the conditions were favorable for the rise of television (Judt, 2005).

Since the very beginning both radio and television broadcasting developed in deeply nationalist contexts. This was caused by the imperatives of national definition, unification and defense dominant at that time. Broadcast media was carefully kept from crossing national lines and was targeted to address only its own citizens and nobody else. It was shaped and strictly regulated by national governments.

Cable broadcasting, though by definition is more localized than broadcast, managed to break these limitations. When it was linked with satellite transmission in the late 1970s, cable channels gained unique ability to cross the borders of its own state and nation. Further rise of digital media was a powerful accelerator of this trend. In 1975 HBO launched the first service to take advantage of satellite distribution of unique film-based programming to local cable franchises nationwide. Cable expanded across the globe. Eventually cable and satellite became deeply intertwined. On one hand cable distribution would not survive without satellites delivering the signal, on the other hand satellite delivery becomes a direct competitor to cable. Cable and satellite as a joint group became a unique tool to open limited national systems to the new, combined public and commercial multichannel service, which is common in most of the countries today (McQueen, 1998).

The expansion of cable-satellite distribution was a serious step towards globalization of television. The first satellites used for communication purposes were launched by US in early 1960s. Later international organization for such services was created as well. Early satellites were achieving speeds higher than earth's own rotation – therefore a more complex technology was required to receive the signal. After geostationary satellites were developed and launched it became easier and cheaper to receive the signal. At the same time the large footprint of a typical satellite signal began radically changing the rules of national media game. Since in early days the satellite dishes were large and difficult to install most satellite reception was done through cable channels acting as a middleman and filter between the service provider and home audience. Since most of the early content consisted of US based entertainment and news programming, this fact was slowing down the multi channel environment development in number of European countries – state broadcasters and agencies (e.g. France, Britain) did not see the need to invest public money to bring American programming to their national audiences (Sherman, 1996).

In Europe, around 1980s when deregulation and commercialization of broadcasting systems was taking place in most countries, the rapid expansion of satellite channels removed practical constraints on the prompt development of private commercial channels. The first commercial satellite in Europe was Astra – launched in 1988, operated from Luxembourg and carrying 16 channels.

Table 1.1 shows the key historic developments in the countries that are used in my work - Baltics and Scandinavia as well as some of the other countries in CEE region.

In all these countries television was developing in its own ways, but was constantly increasing its popularity and social importance. It started off as highly regulated national, black and white phenomenon, which experienced a technological switch to color broadcasts in the beginning of 1970s making it improved viewing experience. The next step – liberalization of state monopoly and bringing in national terrestrial commercial broadcasters which started operating on different parameters compared to public broadcasters.

TABLE 1.1
KEY EVENTS IN TELEVISION DEVELOPMENT

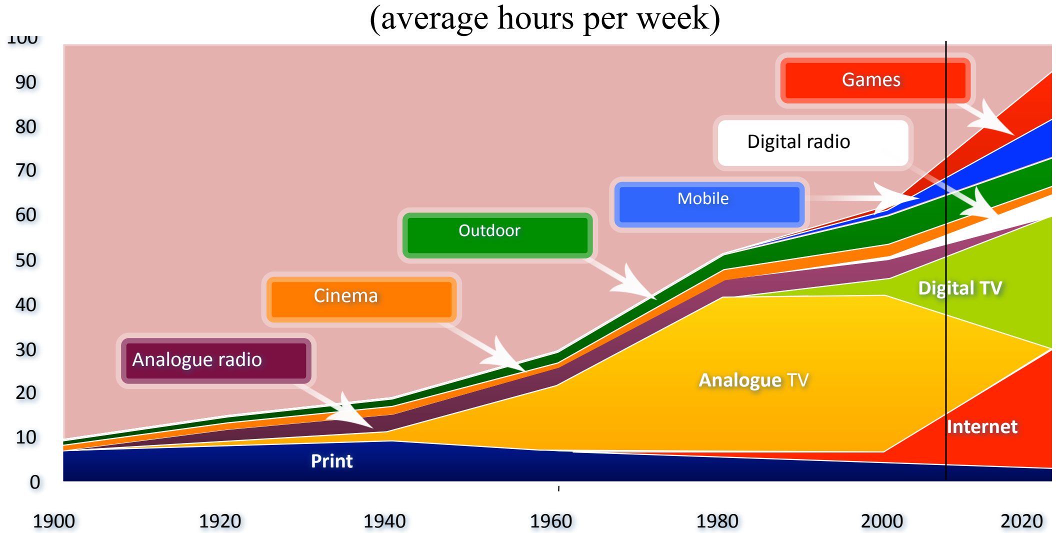
	BALTICS			SCANDINAVIA			CENTRAL EUROPE	
KEY EVENT	Lithuania	Latvia	Estonia	Norway	Sweeden	Denmark	Hungary	Czech Republic
Early tests		1937					From 1936	
Start of TV	1957 - LTV	1954 - LTV	1955- ETV	1960 - official start of NRK1 (Daily programes since 1954)	1954 - tests, 1956 - TV1 launched	1951 DR1, daily broadcasts from 1954, national coverage from 1960	1957 - MTV	1953 - CT1
Color TV	1975		1972		1970	1967	1971	1975
Launch of commercial channels	1993 - TV3, BTV, 1995 - LNK,	1998 - TV3, 1996 - LNT	1993 - Kanal 2, 1996 - TV3	1988 - TVN, 1992 - TV2	1980 - commercial TV via cable, 1987 - TV3, 1989 - TV4 & Kanal 5	1987- TV3, 1988 - TV2	1997 RTL Klub, TV2	1993 - Prima, 1994 - Nova
Analogue shut down (transition to DTT)	Expected by 2012.10.29	2010.06.01	2010.07.01	From 2006 to 2009	From 2005 to 2007	From 2006 to 2009	Expected by 2011.12.31	Expected by 2014

Source: compiled from different sources.

The survival of this new segment depended on their ability to attract attention of broad audiences and convert advertising revenue into profits. Then the following step was done – increasing fragmentation – more smaller local channels as well as higher offer from abroad appearing. The next immediate step - switching off analogue signal and using same frequencies in more effective way – delivering more channels to the viewers on the same band width. The social aspect of this process – increased control from the side of the viewers towards the content they expect from television arising from broader offer of content and increased competition between the TV stations.

This process is parallel to the increase in popularity of Internet, and there are arguments that Internet will eventually replace Television. In my mind this is similar situation as when the emergence of movies was threatening to replace theaters, emergence of television was threatening to replace movies, but the result was that in reality they found the way to co-exist and compliment each other. I believe it will be similar case as well. Chart 1.2 shows the overall media development trend over the last century. It is an estimate, or forecast looking into the future, but in my mind it quite accurately shows the overall direction – average person is increasing the overall exposure to different and increasingly fragmented media, which to high degree compliments each other.

CHART 1.2
GLOBAL MEDIA CONSUMPTION TREND
(average hours per week)



This chart also shows the forecasted upcoming rise of the importance of new digital platforms (like mobile content, digital radio and gaming) in addition to the increased importance of the Internet. All these forms mean that people will have increasingly more control over what content, where and how they expect to receive. For digital television that also means higher pressure to adapt to the new expectations in order to maintain the social relevance of this media. In my mind it is very likely to be translated into:

1. Increased overall content offer with higher fragmentation and better catering to more niche audiences.
2. More pressure for main national mainstream stations to be up to date with their content to the rest of the world (e.g. latest movies and series will be easier accessible via other platforms).
3. Higher focus on moving type of communications more towards dialogue with audiences – looking for the ways to shift a predominant monologue form of television communication more towards dialogue.

The impact on television form other media is also addressed in the empiric part of this work.

EARLY COMMUNICATION THEORIES

Early communication theory is closest related to the works of two Canadian authors - Harrold Innis (1894-1952) and Marshal McLuhan (1911-1980). In his works Innis argued that the type of media available to society has big influence upon the social organization of society itself (Innis, 1951). Writing back in the 1940s-1950s Innis was one of the fisrt to explore the systematic relationship between media of communication and the spatial and temporal organization of power. His theory states that different media favored different ways of organizing political power. According to him the communication media is important factor for the organization of power, irrespective of the content of the messages it conveys.

One of Innis's primary contributions to communications studies was to apply the dimensions of time and space to various media. He divided media into time-binding and space-binding types. Time-binding media, according to him, is durable, it includes clay or stone tablets. Space-binding media is more ephemeral – this includes modern media such as radio, television, and mass circulation newspapers.

Innis examined the rise and fall of ancient empires as a way of tracing the effects of communications media (Innis, 1951). He looked at media that led to the growth of the empire, how it was sustained during its periods of success, and then, the communications changes that hastened collapse of empire. He tried to show that skewing media in the direction of time or space affected the complex interrelationships needed to sustain an empire. These interrelationships included the partnership between the knowledge (ideas) necessary to create and maintain an empire, and the power (force) required to expand and defend it. For Innis, the relationship between knowledge and power was always a crucial factor in understanding empire. He claimed that in the times of Plato, the balance between the spoken word and writing contributed to the flourishing of ancient Greece. This balance between the time-biased medium of speech and the space-biased medium of writing was eventually upset when the oral tradition gave way to the dominance of writing. As the result the torch of empire then passed from Greece to Rome.

Innis's analysis of the effects of communications on the rise and fall of empires led him to warn that Western civilization was facing its own crisis. The development of powerful communications media such as mass-circulation newspapers had shifted the balance decisively in favour of space and power, over time, continuity and knowledge. The balance required for cultural survival had been upset by "mechanized" communications media used to transmit information quickly over long distances. These media had contributed to an obsession with "present-mindedness" wiping out concerns about past or future. Innis believed that Western civilization could only be saved by recovering the balance between space and time. For him, that meant reinvigorating the oral tradition within universities while freeing institutions of higher learning from political and commercial pressures. He suggested that genuine dialogue within universities could produce the critical thinking necessary to restore the balance between power and knowledge. Then, universities could gain the courage to attack the monopolies that always imperil civilization.

Marshall McLuhan further developed the ideas raised by Innis and made them more applicable for modern societies. He thought that the *type* of media had much bigger influence on the social structure than the *content* itself (McLuhan, 1964). According to him television, as electronic media which delivers not just content but also picture and emotions is fundamentally different from print. In the societies, where television plays the role of the main information source, life looks different compared to societies where information is delivered by print.

In the early 1960s, McLuhan wrote that the visual, individualistic print culture would soon be brought to an end by what he called "electronic interdependence" when electronic media would replace visual culture with aural/oral culture (McLuhan 1964). According to him in this new age humankind will move from individualism and fragmentation to a collective identity, with a "tribal base". McLuhan introduced the term of this new social organization and refered to it as “the global village”. Electronic mass media is responsible for creating “global village” where everyone can observe the main events happening in the world, therefore everyone starts participating in them in some way.

The idea that technology is a tool that shapes an individual's and society's self-conception and realization is fundamental to McLuhan's argument. For him technology's effects on cognition is a matter of perspective.

McLuhan also considered that different media invite different degrees of participation on the part of a person who chooses to consume a medium. He distinguished between “hot” and “cool” types of media. “Hot” media requiring little effort and attention while “cool” media demanding higher degree of conscious participation and effort the reader or viewer to extract value. The example of “hot” media are movies - they enhance one single sense, in this case vision, in such a manner that a person does not need to exert much effort in filling in the details of a movie image. As a contrast McLuhan used a "cool" TV which requires more effort on the part of viewer to determine meaning. Another example of “cool” media are comics, which due to their minimal presentation of visual detail require a high degree of effort to fill in details that the cartoonist may have intended to portray. Any hot medium allows of less participation than a cool one, as a lecture makes for less participation than a seminar, and a book for less than a dialogue (McLuhan, 1992).

Hot media usually provide complete involvement without considerable stimulus, it favours analytical precision, quantitative analysis and sequential ordering, as it is usually sequential, linear and logical. It emphasizes one sense (e.g. sight or sound) over the others. Hot media include radio, film, the lecture and photography.

On the other hand cool media usually provide little involvement with substantial stimulus. They require more active participation on the part of the user, including the perception of abstract patterning and simultaneous comprehension of all parts. Therefore, according to McLuhan cool media include television, seminar and cartoons. McLuhan describes the term "cool media" as emerging from jazz and popular music and, in this context, is used to mean "detached."

This concept to some extent forces media into binary categories. However, McLuhan's hot and cool exist on a continuum: they are more correctly measured on a gscale than as dichotomous terms.

I believe that despite the fact that Innis was writing back in the first half of the 20th century when both the media landscape (strong print, rising popularity of radio, TV at it’s birth and Internet not yet existent) and consumer culture were very much different from what we have today, his idea of the effect of “mechanized” media on the fixation of the society on the “present mindedness” is valid when thinking of television. I believe it would be incorrect to say that all television is focused on “present mindedness”, since it also serves as a good link between the present, past and future on a number of topics (e.g.

documentary/history channels and programs are helping to fight historical shortsightedness in a form acceptble for broad mass audiences. News and current affairs programs in their content also are building the bridge into the topics that are of increasing importance in the future – e.g. climate change and alternative energy sources), but the dominant stream of content is indeed focused on the "present mindedness" and relevance for today (especially such important part of mainstream channels as news and current affairs programs).

McLuhan's "global village" is definatelly one of the key processes that are affecting both television and our societies today. Though television is always a national phenomenon, in my mind it should always be considered in a more global context since the processs of globalization are strongly affecting this media and it is also one of the most powerful globalization agents responsible for the forming global village. I analyze the process of media globalization in more detail later on. I also believe that McLuhans distinction between"hot" and "cool" media can be applied not just in differentiation between different types of media, but also when speaking about in depth analysis of television - when looking at the differences of TV channels and TV content as well as how audiences relate to them at different circumstances. Applying the "hot" and "cool" media as two oposing ends of a scale and plotting different genres on the scale we can easily distinguish between the content that is more of a hot, "wallpaper", type (e.g. music videos) and cool, "engaging", – like news and current affairs on the other end. The rest of the content can be allocated in between depending on how much challenge for interpretation and non linear content it offers. As a result that can also be used to see the differences between more "hot" niche channels and "cooler" full format or news channels. The degrees of viewer attention and relation to content are also different at different points during the day – during daytime TV watching is more individual occupation and often serves as wallpaper while being busy with other activities, during prime time it becomes more collective activity and with higher degree of participation. I.e. to put it in McLuhan's terms television can be perceived as “hotter” media during the day and “cooler” during the prime time.

TELEVISION AND THE PUBLIC SPHERE

The concept of “public sphere” comes from the works of Jurgen Habermas (1929, Germany). In his works he paied special attention to the way how public sphere emerged and, according to him – disappeared. The survey of “Culture industry” by Frankfurt school had impact on his views. The survey analyzed different areas of entertainment industry (television, movies, music, print) and brought forward the statement that industrialization of culture destroys the ability of individuals to think independently and critically. Habermas developed these ideas further, but in a slightly different way. He analyzed the development of mass media since 18th century till nowadays. The focus of his work was emergence and death of “public sphere”. Habermass considered “public sphere” to be the arena for public discussions where one could discuss issues important for everyone – a gathering, where individuals have discussion as equals in the form of debate. According to him the public sphere emerged in the saloons and cafes of the main European cities. People would gather here to discuss everyday events. They would get the information necessary for such discussions from newspapers and information leaflets. Politics was the critical topic in such discussions.

According to Habermas in modern societies cultural industry presents standardized and not demanding information. As a result – such debates became weak and public sphere became fake. Politics are edited by parliament and mass media, while commercial interests defeat the issues important for society. “Public opinion” is no longer formed in open and rational discussions, but rather through manipulation and control (just as in advertising).

Though, without any doubt, Habermas’ work was groundbreaking, it faces rather strong criticism (Calohun, 1992). The main critical points:

1. Focus on the burgeois public sphere. He is critisized for focusing too much attention on the burgeoise public sphere and neglecting the other forms of

public discourse and activity. The emerging bourgeois public sphere defined itself in oposition to the traditional authority of royal power, at the same time it was confronted by the rise of popular movements which it tried to contain.

2. Emphasis on the periodical press. Habermas focused on political periodicals like Review and Examiner, but these periodicals were neither the first, nor the most common forms of the printed material. In addition there was a wide range of other printed materials – books, news sheets, pamphlets, etc. It is not clear why these publications were excluded from his work. If they were included, he might have painted a different picture of the public life where less emphasis would have been placed on gentlemen in the coffee house debates and hightened the commercial character of the early press as well as sensationalist content of many of its products.
3. Restricted nature of the burgeois public sphere. Although burgeois public sphere was based on the principle of universal acess, in reality it was restricted to those individuals who had the education and the financial means to participate in it.
4. Arguments on alleged decline of public sphere. Habermas argues that the separation between the state and civil society, which had created an institutional space for the burgeois public sphere, began to break down as states assumed increasingly interventionalist character. At the same time the institutions that used to provide the forum for burgeois public sphere died out or underwent radical change. The comercialization of the media alerted its character in a fundamental way – what was once a forum of rational-critical debate, becomes just another domain of cultural consumption and the burgeois public sphere collapses into a sham world of image creation and opinion management. This argumentation is attacked in couple of ways. First – for Habermas assuming that recepients of media products are relativelly passive consumers who are easily manipulated by media techniques. Second – for his claim that public sphere in the modern societies has been refeudalized. Critics claim that in fact the development of

communication media created new forms of interaction and new networks of information diffusion.

I believe that despite the criticism Habermas' thoughts on public sphere are still important today when talking about the role of television in society. I do not agree with Habermas' statement that public sphere dissapeared. In my mind the idea brought forward by John Thompson that public sphere did not dissapear, but instead it includes more things than before, is the most accurate one. Indeed despite the shift towards more monologue form of communication and higher degree of standardization or more "mechanic" approach, television is still one of the dominant platforms for bringing up and discussing crucial social issues. The degree of dialogue and possibility for "discussion as equals" is certainly reduced compared to the saloon discussions portrayed by Habermas, but still it is present. The distinction of monologue vs dialogue is also different depending on the type of television channel and programe. News programs are the key source for providing the "official" information on the current affairs as well as following up on resonating events from the past. Looking at the popularity of the news programs both on commercial and public broadcasters in different countries there is no doubt left that they do serve as a public sphere for mass audiences of today. Of course the degree of active participation and discussion for audiences is reduced. This part of television as a public sphere is more developed in other forms of television content – political discussion shows, talk shows or programs specializing on in depth analysis of the events. Here the closest form of comming to a wide discussion is through "panels of experts" that represent the oposing opinions and viewer call ins and interactive votings supporting the prefered position. It is not an ideal form of "discussion as equals", but this is still serving as a public sphere and provides a medium degree of participation for a common person in a discussion of social issues compared to newspapers (which are more limited) and internet (which provides more possibilities). To sum up – I believe that public sphere is very much alive, it is quite different from the one described by Habermas and television is an integral and important part of it.

IMPACT OF COMMUNICATION MEDIA ON THE RISE OF MODERN SOCIETIES

As already briefly discussed in the section about the early communiction theories, the development of media and development of society is strongly interlinked. In my mind the works by John Thompson (University of Cambridge, UK) are of key importance when trying to understant what impact communication media had on the rise of the modern societies. Thompson claims that in order to understand cultural transformations central role must be given to the development of communication media and its impact. He shows that the development of the media was closely tied with the major institutional transformations which have shaped the modern world. In his mind the development of communication media from early forms of print to recent types of electronic communication was an integral par of the rise of modern societies. In his work "The Media and Modernity. A social theory of the media" Thompson claims that:

"... we can understand the social impact of the development of new networks of communication and information flow only if we put aside the intuitivelly plausible idea that communication media serve to transmit information and symbolic content to individuals whose relations to others remain fundamentally unchanged. We must see, instead, that the use of communication media involves the creation of the new forms of action and interaction in the social world, new kinds of social relationship and new ways of relating to others and to oneself ..." (Thompson, 1995).

Thompson analyzed the relationship between the development of industrial societies and mass media. One of his main topics – attention to the transformation of space and time in social life and emergence of new forms of relationship.

Thompson partially used works of Habermas, though at the same time values them rather critically – according to him modern mass media does not deprive us from the possibility to think critically as Habermas stated. Thompson believes that Habermas's argumentation could no longer be sustained in its original form. Still, in his view Habermas' early works on the emergence and transformation of the public sphere still deserve carefull consideration – its great strenght is the fact that this work treats the development of the media as an integral part of the formation of modern societies. It's Habermas' general vision that deserves respect.

Thompson believes that development of communication media is a reworking of the symbolic character of social life, a reorganization of the ways in which information and symbolic content are produced and exchanged in the social world and a restructuring of the ways in which individuals relate to each other and to theselves.

The forms of power

Following Michael Mann and Pierre Bourdieu, Thompson distinguishes 4 main types of power – economic, political, coercive and symbolic (table 1.3).

TABLE 1.3
FOUR TYPES OF POWER

Forms of power	Resources	Paradigmatic instirutions
Economic power	Material and financial resources	Economic institusions (e.g. commercial enterprises)
Political power	Authority	Political institusions
Coercive power (especially military power)	Physical and armed force	Coercive institutions (especially the military, but also the police, carceral institutions, etc.)
Symbolic power	Means of information and communication	Cultural institutions (e.g. Church, schools and universities, the media industries, etc.)

Source: Thompson, 1995

The forms of power tend to overlap. Symbolic power is close to what Bourdieu called 'cultural capital' and 'symbolic capital'. Symbolic power according to Thompson stems from the activity of producing, transmitting and receiving meaningful symbolic forms. Sybolic actions may give rise to reactions and may lead others to act or respond in certain ways. He uses the term "symbolic power" to refer to the capacity to intervene in the course of events, to influence the actions of others and to create events by the means of the production and transmission of symbolic forms. Media institutions are among the other cultural institutions excersising symbolic power. They are oriented towards large-scale production and generalized diffusion of symbolic forms in space and time.

The uses of communication media

When producing symbolic forms and transmitting them to the others, individuals employ technical medium. The specifics of different technical media shape the kinds of symbolic production and exchange. Thomposn identified four key aspects of technical media: 'fixation', 'reproduction', 'space-time distanciation' and 'skills & competences' and explained their relation to power.

TABLE 1.4
THE USES OF COMMUNICATION MEDIA

Attribute of technical media	Description	Relation to power
Fixation	Technical media = information storage mechanism. Preserving symbolic form in the medium which has varying degrees of durability. Varies in the degree to which message can be altered or revised.	Technical media and information or symbolic content stored in them can be used as a resource for excersising different forms of power.
Reproduction	Capacity of technical medium for the production of multiple copies of a symbolic form. It is one of the key characteristics that underlines the possibility of commercial exploitation.	Symbolic forms can be "commodified".
Space-time distanciation	Process of symbolic exchange involves the detachment of a symbolic form from the context of it's production - it is distanced both in space and time from its context and re-embeded in the new contexts which may be located in different times and places. Extent of distantiation varies greatly depending on the circumstances of communication and type of technical medium.	Altering space and time conditions of communications, the space and time conditions under which power is excercised are also modified.
Skills, kompetences and forms of knowledge involved in using technical media	Different skills needed to encode symbolic content and to decode this message. When message is encoded or de-coded not only the skills required by the technical medium are used, but also various forms of knowledge and background assumptions which are part of cultural resources used in the process of symbolic exchange.	Forms of knowledge and background assumptions shape the ways how messages are understood and how individuals relate to them, integrate them into their lives.

Source: Thompson, 1995

Most individuals who watch television programme are able to make some sense of the programe even though they may know very little about how the programe is produced. According to Thompson – mass media presents versatile information that we were simply not able to get before. He believes that Habermass is mistaken when considering society as passive recipient of information from mass media. Thompson's mass media theory is based on the difference of three forms of interaction – face to face, mediated and mediated quasi interaction (table 1.5).

TABLE 1.5
KEY FORMS OF INTERACTION

Interactional characteristics	**Face-to-face interaction**	**Mediated interaction**	**Mediated quasi interaction**
Space-time constitution	Context of co-presence; shared spatial-temporal reference system	Separation of contexts; extended availability in time and space	Separation of contexts; extended availability in time and space.
Range of symbolic cues	Multiplicity of symbolic cues	Narrowing of the range of symbolic cues	Narrowing of the range of symbolic cues.
Action orientation	Oriented towards specific others	Oriented towards specific others	Oriented towards an indefinite range of potential recipients
Dialogical/monoligical	Dialogical	Dialogical	Monological

Source: Thompson, 1995

If the dialogue is dominant in the first two forms, then it is monologue that is characteristic to the third one. This form is most common in television. According to Thompson all three forms of interaction are mixed in daily life, but the third one starts to be increasingly dominant compared to the first two. He makes an assupmtion that mass media changes the ballance between private and public. The public sphere did not dissapear, but it includes much more things than before.

In my mind Thompons ideas best describe the role and significance that television plays in our daily lives today. It is true that most of the television content with a few exceptions is created as mediated quasi interaction that is imposing the monological form of communication. At the same time considering the amount of time that an average person spends watching television every day and that television for mass audiences is one of the key daily activities it is logical to assume that even though recepients of the messages communicated to them are not passive, they are still heavily affected by this content. That the content reaching them is shaping their opinions, beleifs and the way they perceive the surrounding world. These statements are further developed in the next section – television and the shift in social relationships.

TELEVISION AND THE SHIFT IN SOCIAL RELATIONSHIPS

If we accept the assumptions that people are not passive recipients of mass media messages that they receive and that television is an important part of daily lives that has an impact on the way how people perceive and interpret the social life surrounding them, we can talk about television and the shift in social relations. The ideas of Jean Baudrillard (1929-2007, French postmodernist) are critical for this topic. Baudrillard is one of the most influential theoreists in the area of modern mass media, he believes that the impact of modern mass media is fundamentally different from the impact of other technologies and is much stronger. According to him television not only shows the image of the world to the viewer, but starts to increasingly define what is in fact the world we live in.

His work was influenced by McLuhan's ideas. Baudrillard further developed McLuhan's ideas about how the nature of social relations is determined by the forms of communication that a society employs. He introduced the concept of Simulacra. The Simulacra involves a negation of the concept of reality as we usually understand it. Baudrillard argues that today there is no such thing as reality.

According to him – most of how we learn about the world comes via television – especially through the news and current affair programmes. Perfect illustration – Baudrillard's well known statements about the war in Persian Gulf (Baudrillard, 1995). He claimed that constant news attention to the war changed this event so much that the war itself was replaced by the images on television that claimed to be representing the war. Only a relativelly small part of people actually took part in the war, but for almost everyone this war was the media evnt. The main reasons why this happened:

- events were broadcasted live, creating perception of real time participation in the event;
- videos and pictures were delivered worldwide using international media networks, which led to standardized depiction of the event using same or similar vizuals.

- very simple forms of communicating the content were used (good-bad, employment modern war technologies allowing to achieve victory without bloodshed, heroism).
- importance of iconic images when portraying complex events.

Baudrillard claims that now, when mass media is everywhere, new reality is being created – a **hiperreality**. It is created by combining humane behaviour and images created by mass media. The world of hiperriality is created using *simulacura* – images, that derrive their meaning from other images and therefore do not have any direct basis of "external reality".

Baudrillard claims that postmodern society has replaced all reality and meaning with symbols and signs, and that the human experience is of a simulation of reality rather than reality itself. The simulacra that Baudrillard refers to are signs of culture and media that create the perceived reality. Baudrillard believed that society has become so reliant on simulacra that it has lost contact with the real world on which the simulacra are based.

Simulacra and Simulation identifies three types of simulacra and identifies each with a historical period:

1. **Associated with the pre-modern period**, where the image is clearly an artificial placemarker for the real item.
2. **Associated with the industrial Revolution**, where distinctions between image and reality break down due to the proliferation of mass-produced copies. The item's ability to imitate reality threatens to replace the original version.
3. **Associated with the postmodern age**, where the simulacrum precedes the original and the distinction between reality and representation breaks down. There is only the simulacrum.

Baudrillard theorizes that the lack of distinctions between reality and simulacra originates in several phenomena:

1. **Contemporary media** including television, film, print and the Internet, which are responsible for blurring the line between goods that are needed and goods for which a need is created by commercial images.
2. **Exchange value**, in which the value of goods is based on money rather than usefulness.
3. **Multinational capitalism**, which separates produced goods from the plants, minerals and other original materials and the processes used to create them.
4. **Urbanization**, which separates humans from the natural world.
5. **Language and ideology**, in which language is used to obscure rather than reveal reality when used by dominant, politically powerful groups.

The criticism related to sometimes radical statements from the side of Baudrillard can be well summed up in the quote from Mark Poster - his editor and one of a number of present day academics who argue for his contemporaty relevance: “Baudrillard's writing up to the mid-1980s is open to several criticisms. He fails to define key terms, such as the code; his writing style is hyperbolic and declarative, often lacking sustained, systematic analysis when it is appropriate; he totalizes his insights, refusing to qualify or delimit his claims. He writes about particular experiences, television images, as if nothing else in society mattered, extrapolating a bleak view of the world from that limited base. He ignores contradictory evidence such as the many benefits afforded by the new media ...”

I believe that though Baudrillard’s statements are hyperbolic, they are also a good depicturing of the increasingly important role that mass media and television plays on the way we perceive the world surrounding us as well as the key reasons why this phenomenon emerged. A more practical illustration in the shifts of social relationships caused by media is found in the works of Joshua Meyrowitz, professor of communications at the University of New Hampshire. He combines the analysis of electronic media inspired by McLuhan with with an account of social interaction derived from Goffman. In his book “no sense of place” Meyrowitz uses the example of the television to describe how technologies have shaped and influenced the social relations we encounter on a daily basis, proposing that television has been responsible for a significant cultural shift towards new and egalitarian social interactions. He demonstrates how television is a "secret exposing" machine which allows individuals to watch others in an unprecedented fashion. According to Meyrowitz, it is this characteristic that is responsible for television breaking down the barriers between children and adults, men and women and even humanising and demystifying the powerful. In other words, Meyrowitz explores television as providing a new form of human experience, which distorts traditional social distinctions by discussing ideas of changed childhood, blended genders, and demystified leaders (Meyrowitz, 1995).

Changed childhood. According to Meyrowitz, television is the "secret-exposing machine", letting children in on the "biggest secret of all, 'the secret of secrecy'". Children become exposed to a variety of images and information, which "dilutes the innocence of childhood and the authority of the adults". Prior to television, parents could be completely aware of what their children were reading, making the censoring of information easier, compared to the lack of control parents have when it comes to television. As children become older the level at which they were able to read increases, allowing children to gradually explore adult issues. Television blurs the boundaries between children and adults because children are now given earlier access to information about adult issues. Meyrowitz argues that it is for this reason that children appreciate television so much, it is able to "extend their horizons of experience".

Blended genders. Meyrowitz postulates that television has broken down distinctions between the sexes, enabling women to become aware of public realms of sport, war, politics and medicine and conversely for men to become in touch with their emotional, private side. He claims this has led "toward more career-oriented women and more family-oriented men, toward more work-oriented homes and more family-oriented workplaces", in essence a blending of the genders.

Demystified leaders. Meyrowitz states that prior to the saturation of television in society, political leaders had been treated as a "mystified presence", at a status above the common citizen, as it was easier to control the flow of information that represented who they were and what they did. Although television is a useful tool for politicians in trying to create this status, it "tends to mute differences between levels of social class". Meyrowitz terms this "a double-edge sword", as over exposure of a political leader diminishes their power, with their continuous presence making them seem more ordinary and less mystified. This over exposure is difficult to balance with under exposure, as without media presence a leader has minimal power over people, yet with exceeding presence they lose power. Because of the immediacy of information to the common citizen about all issues of society, they are now able to closely inspect the image of our leaders, creating a demystification of their presence.

I will come back to analyzing these effects of television in more detaiul using Lithuania as an example in the empirical part of my work.

INTERNET RUNS ON LOVE, TELEVISION RUNS ON COMMERCE AND POPULARITY

Paralleling television and internet allows to see the fundamental difference between the two media and what they are based on. I borrow the statement that "Internet runs on love" (Shirky, 2009) from Clay Shirky (1964, New York University). Though the focus area of his work is internet, I find his thoughts usefull in revealing the core that television is revolving arround – popularity and commerce. In my mind, the sucess of internet sites is the ability to go into clearly specialized niches, where internet serves as a platform for creating communities and allowing users to be active creators or modifiers of content. This allows for the internet to "run on love", or passion of internet users who activelly contribute a small portion of their time and creativity which is combined with unparalleled global comunity. It does not mean that there is no commerce on Internet (amazon, e-bay, banner trading, etc.), but the dominant part of the content is created with non-profit or low profit orientation (e.g. wikipedia, youtube).

Television, as well as all other traditional media, is different. Love of the viewers is not sufficient. Creating television content and sustaining distribution channels costs money, is rather expensive and needs one or another form of financial support – be it fees or government financing in case of public broadcaster, revenue from advertising in case of national commercial broadcasters or cable fees for niche cable channels. I.e. television is inevitably trapped in constant chase for popularity – ratings that can be translated into revenue from commercials. As we will see later "popularity" is very important for television since most of the time that viewers spend watching TV is taken by commercial channels (at least in the Baltics) and thus funded by commercials.

Talking about popularity, I find the statement "popularity makes popuylarity" (V.Gaidys) well describing the mechanism behind the television ratings. The most popular, and therefore sucesfull in commercial terms, television programs are the ones that are able to become "the talk of town" – when a person feels left out in the informal gathering of people (be it at work or at school) if he doesn't know what latest developments are being discussed. In my mind, this is a "spiral of silence" (a term created by Elisabeth Noelle-Neumann, 1916-2010, Germany) applied in everyday life as well as through the publication of "most popular" TV programs in the TV guides. Neuman's spiral of silence is a political science and mass communication theory. It asserts that a person is less likely to voice an opinion on a topic if one feels that one is in the minority for fear of reprisal or isolation from the majority.

Neumann's theory is based upon 12 crucial points (Neumann, 1993):

1. People have a fear of being rejected by those in their social environment, which is called "fear of isolation."
2. People are constantly observing the behaviors of those around them, and seeing which gain approval and disapproval from society.
3. People unconsciously issue their own threats of isolation by showing signals of approval or disapproval.
4. Threats of isolation are avoided by a person's tendency to refrain from making a statement about something they think might attract objections.
5. People are more willing to publicly state things that they believe will be accepted positively.
6. The spiral effect begins because when people speak out confidently, the opposition feels a greater sense of fear of isolation and is further convinced to stay silent, since they are in the minority. The feelings continue to grow in either direction exponentially.
7. A strong moral component is necessary for the issue to activate the spiral.
8. If there is a social consensus, the spiral will not be activated. There must be two opposing forces.
9. The mass media has a strong influence on this process.
10. Fear and threat of isolation are subconscious processes.
11. The spiral of silence only "holds a sway" over the public for a limited time.

12. If a topic activates the spiral of silence, this means that the issue is a great threat to social cohesion.

According to this theory mass media plays a large part in determining what the dominant opinion in a group or society is, since our direct observation is limited to a small percentage of the population. Mass media has an enormous impact on how public opinion is portrayed, and can dramatically impact an individual's perception about where public opinion lies, whether or not that portrayal is factual. Noelle-Neumann describes the spiral of silence as a dynamic process, in which predictions about public opinion become fact as mass media's coverage of the majority opinion becomes the status quo, and the minority becomes less likely to speak out. The theory, only applies to moral or opinion issues, not issues that can be proven right or wrong using facts. It is as much a measure of protection as it is one of oppression. Since it only applies to moral issues, which tend to evoke passionate responses in even the most reserved individuals, it can be used to contain social unrest over highly controversial topics. Though it can aid in keeping civil order, attempts to employ it knowingly are essentially methods of manipulation and coercion.

What spiral of silence means for television is that if a certain program gains initial popularity, it also draws additional “buzz” from the surrounding medias – newspapers, magazines, internet thus amplifying and boosting the popularity further. The opinion and approval of a certain content by a broad audience is then increasingly imposed on the undecided ones. This refers mainly to local reality shows and entertainment programs, that have constant developments in content and grow into a “talk of town” – a person is left out and feels a minority within his immediate social environment if he is not aware of the developments in the “popular” program.

POSTMODERN TELEVISION

When it comes to discussing television “Post-modern” or “postmodernism” can have a few meanings. Direct translation “post” “modern” – something that comes after modern – emphasizes novelty. Novelty in itself can be understood both positivelly – post modern television can be experimenting, inovative and interesting. It can also be understood negativelly – post modern television can be shallow and banal.

Modernity includes industrialization and mass culture, which is followed by post modern post industrial culture and fragmentation of mass audiences into niches.

To analyze television in the context of postmodernism – one of the ways how to analyze the the changes in television and culture. Postmodernism refers both to the style and form of television, its place in the modern culture and understanding that a new cultural stage is reached. The fact how deeply television and other media branches are integrated into society and culture is in itself a proof of a new, postmodern stage of history (Collins, 1992).

Postmodernism can be used both when talking about the **style** of television programes, their **value**, distribution of programmes over global media networks (**globalization of television**) and when talking about the **relationship** between audiences and television.

1. Postmodernism and style. When talking about post modernity of television we basically talk about “self-reflection”. It is typical for post-modern style of television to use earlier forms, values and ideas of previous programs and play with them in a self-conscoius way. Animation series Simpsons (is used as case example in the empyric part of this work) is a good example – most of the jokes come from a reflexive parody of established things – other series, horror movies, TV news, etc. Instead of using parody as a negative critics of television, post modern television enjoys including the content of traditional television while creating the new type of content.

2. Postmodernism and values. Important question coming from a combination of “elite” and “popular” culture is how to evaluate the importance of postmodern television. Using the same example of Simpsons we can look at it as important cultural work. This statement can be made because of the complex content, self-awareness and relevance of these series for todays fragmented audiences. These elements match the criteria of "art". At the same time there is no doubt that Simpsons are a part of popular culture, for the fact alone that it is broadly carried by television networks arround the world.

So when defining what is a value in post-modern television there are three main directions of answers:

First – postmodernism can be seen as a result of powerfull global political and economic structures, which are mainly concentrated in the hands of USA and their allies. Simpsons in this case illustrate the sucess in producing and distributing the series, which personifies the new cultural reality of international capitalism. According to this view – postmodernism is a form of culture that is parallel to the dominance of global capitalism.

Second – such authors as Baudrillard would state that the question of value is no longer relevant as the forms of elite and popular culture became mixed in the post-modern. Art became a commodity (e.g. giftshops in the modern art galleries), while commodities (like Simpsons) are being discussed as a form of art.

Third – value can be seen in how different audiences relate to Simpsons. Children watch it as animation commedy. Teenagers and youth – as cult animation. Cultural teorists – as a perfect example of post-modern television.

Each of these approaches is related to different theoretic aspect – international capitalism, form of commodity and culture of audiences.

Postmodernism and globalization. Examples of worldwide spread postmodern television can be easily found in the area of worldwide trade of television formats. Well-known international formats for Lithuanian audiences – such as "Pop Idol", "Sing with a star", "Dance with a star" are a perfect illustration of export internationally successful culture and their localization for local cultural context. The consequences of such spread of post-modern television are both positive and negative:

- postmodern television promotes consumerism culture;
- it integrates global and local cultural values;
- the combination of traditional and modern elements reduces borders between past and present.
- it utilizes on the ways how the viewers use modern technologies (mobile phones, internet) and integrates this knowledge into building closer relationship between viewer and television.

4. Audiences and post-modernism. Still back in the 1970s scholars working in the area of television started talking about ideology (based on Marxist analysis of society) and how television content is created with the aim of communicating the meaning of the message to the audiences in the most effective way (based on the Film theory). After combining these two aspects it was demonstrated how television programs and advertising are communicating dominant ideology, where consumption is the core of identity and class/econimical relations between people are blured. Television programs become the agents for distributing these ideas, providing the viewers only limited possibilities to resist their meaning or interpret them in a different way. Post modern way of looking at television is recognising that different audiences interpret television in different ways and integrate television viewing into culturally different contexts.

Postmodernism helped to shift television analysis from structure to agent (Bignell, 2004).

In case of **structure** analysis the attention is payed at institutions, netorks and professional specifics, which define how television is produced and distributed. This approach is based on theories of ideology and globalization, which try to explain the reactions and choices of the viewers, and the content of television programs as a result of these structural conditions.

In case of analysis of **agent** – the focus is on new values attributed to the choices of viewers and the ways in which viewer negotiates with television content and media structures in order to define and empower himself as individual.

The competition between the two approaches is important but selection of just one of them is hardly enough. In fact post modern theory is the understanding that more than one model or approach should be applied when studying television culture. In my work I combine the two approaches to reveal both how television is organized and how it is relating to audiences.

GLOBALIZATION OF TELEVISION.

Already back in 1960s McLuhan mentioned the term of global village. The term of television globalization itself can define different things - television products – series, movies, and formats of the programs – created and distributed by major international corporations. The systems (platforms) for distributions of these products – satellite network, allowing to broadcast programs outside of the borders of national state. And also the users of products distributed in these ways – global audiences.

The process of media globalization pushes forward the “horizontal” forms of communication. Traditional forms of media used to ensure “vertical” forms of communication inside the national states, the process of media globalization promotes “horizontal” integration. It is easier now for media and communication forms to cross the borders of nation states.

Industrial states, especially the USA are on the forefront of media production and distribution. This fact brings forward the arguments about imperialization of media. The term of cultural imperialism was created in 1950s-1960s based on the works of such schollars as Herbert Shiller. The term of cultural imperialism was talking about the worldwide export of western, especially American television. Supporters of this view are talking about established cultural empire. Countries with strong economies are dominating in the spheres of creating and distributing media producsts, at the same time less economically developed countries are especially vulnerable to this proecess since they lack resources to maintain their cultural independence. In my mind this is a crucial aspect for Lithuania and the Baltic region, since we are located in the crossroads of cultural influences from both the Western civilizations and

Russian speaking neighborhood. At the same time our television is also in charge of preserving our national cultural independence and identity (Dowmunt, 1993).

Looking into the key factors that helped global mass media to emerge David Held, professor at Open University, Milton Keynes (UK) and his colleagues indicated 5 most important factors (Held, 1996):

1. Increasing concentration of ownership. A few powerful corporations dominate worldwide media.
2. Shift from public to private ownership – the trend of commercialized mass media.
3. Transnational corporate structures. Media companies are no longer acting only within the borders of their own states.
4. Diversification of mass media products. Corporations expand the spectrum of content.
5. Increasing number of corporation mergers in the area of mass media.

Table 1.6 shows dominant global media corporations.

TABLE 1.6
TOP 5 GLOBAL MEDIA CORPORATIONS

Nr	Company	Key channels
1	**General Electric**	NBC (USA), Telemundo (USA), Channels in Europe (CNBC Europe, 13eme Rue (France), 13-th street (Germany), Calle 13 (Spain), Studio Universal (Germany, Italy), Universal (Latin America), CNBC Asia and more than 15 cable channels in the USA.
2	**Time Warner**	WB network (USA) and tve stations including HBO (USA), Court TV (USA), Cartoon Network (Europe, USA, Latin America, Asia), Turner Classic Movies (USA, Europe, Asia, Latin America), CNN (USA, Europe, Asia, Latin America).
3	**Walt Disney**	ABC network (USA), Touchstone Television, Buena Vista Television, Walt Disney Television (USA), ESPN, Disney, A&E, History Channel, Biography Channel, Lifetime, E! (JAV-Europe).
4	**News Corporation**	Fox network (USA), Star TV (Asia), Fox movies, sports and news channels (JAV) and international channels FX, National Geographic. British Sky Broadcasting and Sky shareholder.
5	**Bertelsmann**	RTL group running thirty four European channels and producing programs in forty countries. European channels: Five (UK), RTL9 (France), RTL4 and 5 (Holland), Yorin (Holland), RTL TVi, Club RTL, Plug TV (Belgium), RTL Tele Letzebuerg, BCE, Den 2.RTL, ENEX (Luxembourg), RTL Televizija (Croatia), Antena 3 (Spain), RTL Klub (Hungary).
6	**CBS**	CBS network, UPN network and Showtime network (USA) and channels distributed worldwide, such as Showtime and Movie Channel
7	**Viacom**	International channels such as MTV, Nickolodeon, VH1, Comedy Central, Paramount Comedy and TMF.

Source: Bignell, 2004

The term “mass comunication” or “mass media” in itself can be missleading to a certain degree. It suggest that the recepients of media products are passive individuals. There were criticisms that the development of mass culture that assumed that development of mass comunication has had a largely negative impact on modern social life, creating a kind of homogenous culture that entertains individuals without challenging them. When talking about media globalization and cultural imperalism one of the natural questions is if the same product shown to different audiences in different countries is received and perceived in the same way. Tamar Liebes and Elihu Katz (Liebes, Katz, 1990) conducted a well known survey about a well known soap opera “Dallas” created in the USA back in the 1980s. They established that in different nations and cultures this program was in fact perceived in very different ways. “Dallas” was chosen for the survey since Liebes and Katz believed that the future of television lies in increaing homogenity of programs, where US dramas will play the central role. “Dallas” shows the story of “American dream” about financial sucess and personal hapiness. Cultural differences in perception of the same content discovered during this survey are best illustrated by these examples:

- The viewers of North America saw the series as a proof that money in fact save people from everyday trouble.
- Viewers in Israel perciewed the series as a proof that money does not bring hapiness.
- Russian jews, who in those times emigrated to Israel from the Soviet Union not long before the survey, saw the series as a subtle criticism of capitalism disclosing its internal contradictions.

This survey illustrated that content of television programs is understood depending on the cultural environment of the viewers, their expectations and it is not simply introduced as lethal medicine into the cultures where it is being watched (Katz, 1985).

The most straight forward theories of cultural imperialism, stating that the world is being americanized, pay too little attention to cultural and national pecularities of television viewing. They also underestmate the streams of television products in smaller regions – e.g. regions sharing same language.

Hermeneutics emphasizes the fact that the reception of symbolic forms, such as media producsts, always involves a contextualized and creative process of interpretation in which individuals draw on the resources available to thm in order to make sense of the messages they receive. It also emphasizes the fact that the activity of "appropriation" is part of an extended process of self-formation through which individuals develop the sense of themselves and others, of their history, their place in the world and the social groups to which they belong. It emphasizes the creative, constructive and socially embedded character of interpretation and converges with etnographic work on reception of media products.

I believe that today it is already a quite well known fact that we increasingly find ourselves living in a global village. In my mind this process is created by more agents than just media – starting from the way how air travel was re-shaped in recent decades moving from being perceived as a luxury and business activity, to the equivalent of a modern day "bus". This caused planet to shrink and created possibility for more people to physically get to more remote locations in faster and cheaper ways than before. It is also further amplified (especially in CEE) by new economic and political structures like expansion of European Union and introduction of common currency. This process increasingly moves individual's focus from focus on nation state alone to more international perspective and perceiving oneself as a part of bigger community. Deregulation of television, as one of the dominant media, and fast growth of alternative choices available to the viewer in my mind is a fast catalyst in transforming the mindsets of individuals to more global/international. When talking about globalization of media and television it is interesting how Anthonny Giddens looked at globalization (table 1.7).

Giddens defined globalization as rather recent phenomenon. One or two decades ago the term “globalization” was rather unknown. Today it seems to be a common word. According to him, globalization indicates the fact that we are living in “one world”, which means that mutual dependency of individuals, groups and nations is increasing.

Though globalization is very much an economic phenomenon, it is also a political, social and culturall process. Fast development in the area of mass media and communication technologies are speeding up and pushing this process forward. Mass media increased the speed of humane interaction and thinking in the entire world.

TABLE 1.7
THE CONCEPTUALIZATION OF GLOBALIZATION

		Hiperglobalists	**Sceptics**	**Supporters of transfromation**
1	What’s new	Global age	Commercial groups, weaker geo-management.	Unprecedented levels of global interaction.
2	Dominant qualities	Global capitalism, global management, global civic society	World less dependent than in 9-th decade of XIX age	“Thick” (intensive and extensive) globalization
3	Power of nation states	Weakening or dissapearing	Strenghtened or increased	Restored or restructured
4	Driving forces of globalization	Capitalism and technologies	Governments and markets	General forces of modernity
5	Stratification models	Disintegration of old hierarchies	Increased South migration	New world order
6	Dominant motivation	McDonnald’s, Madonna, etc.	National interest	Transformation of political community
7	Conceptualization of globalization	Rearrangement of the basics of human activity.	Internationalization and regionalization.	Reorganization of inter-regional relationship and remote activity
8	Historic trajectory	Global civilization	Regional blocks, conflicts of civilizations	Undefined: global integration and fragmentation
9	Generalizing statement	End of nation state	Internationalization depends upon agreement and support from governments	Globalization transforms the powers of governments and world politics

Source: Giddens, 2001.

Looking at the conceptualization of globalization put forward by Giddens, I find my view to be closest to the one of “Supporters of transformation” and on some issues like, power of nation states - to the “hyper globalists”. I.e. I believe that we live in the times where we experience unprecedented levels of global interaction, but this is not yet a global age yet (as hyper globalists would say). That current dominant quality is intensive and extensive globalization, in this process the power of nation state is weakening (though I do not believe it will disappear). I see capitalism and technology as driving forces of this process and global media, including television, playing important role in changing perceptions. In general – I agree to the biggest extent that globalization transforms the powers governments and world politics.

Being aware of the increasing communication focused on consumerism and mass culture, I see the process of media globalization first of all as a positive phenomenon, resulting in more choices for audiences and higher possibilities to influence media. In my mind media locked inside of the nation state faces a big threat of increasingly becoming a tool for making political influence and shaping public opinion utilizing number of tools including the projected opinion of majority over the rest of population (spiral of silence). In this case media is easy target for loosing its function as a properly functioning part of public sphere. Globalization process on the other hand, creates choices for both information and entertainment. It shifts focus more towards commercial success of media which in a way also gives audiences more control over media as their viewing choices become increasingly important. factor in defining what is relevant, acceptable and interesting content and what is not. This process also puts local, national media into a broader international perspective.

PART 2
TELEVISION AND AUDIENCES. EMPIRICAL ANALYSIS

"If current trends of television consumption will continue, any kid born now by the time he gets 18 will have devoted more time to watching television compared to any other activity except for sleeping".

Anthony Giddens

The second part of my work is dedicated to the analysis of empirical data of actual television viewing. My key focus is on sociological aspect of interaction between television and viewer audiences and different ways in which audiences relate to television. The core data comes from Lithuanian TV meter survey. For broader picture results are also put into a broader pan-Baltic perspective as well as benchmarked against Scandinavian countries.

Measurement of television viewing in most European countries is done using electronic TV meters. Though the purpose of electronic TV measurement is primarily commercial – to serve as market currency for TV advertising trading in each country – it is also the most sophisticated and detailed measurement of television available today. The panels are constructed based on a big scale establishment surveys. The validity of procedures for collecting data is often verified by independent international auditors. My aim is to conduct analysis of audience behavior in Lithuania and combine it with television viewing trends in the Baltic countries over the period of last 10 years. The analysis was done using data from these countries using specialized software. Additional statistic analysis was done in SPSS.

In order to gain a broader European perspective, some tables are also constructed and analysis is done based on the secondary source - quoting basic results of TV meter surveys from IP publication "Television in 2009". The aim of using this source is to have a broader picture of television landscape in Europe and where Lithuania and other Baltic countries, which are analyzed in greater details later, fit into it.

There are five most frequent terms or parameters used in this part:

1. **Target group** – a definition of group of people based on a set of demographic parameters. For broadest adult population a 4+ (all individuals of 4 years and older) target group is used.
2. **ATV** – average time viewed – expressed as an average number of minutes that individual spends watching television per day. The parameter allows comparing how much time different individuals or

target groups spend watching television – a social significance of this media in their daily lives.

3. **Affinity index** – the ratio between average ratings in two target groups – most often a target group compared to general population (4+). This parameter shows if a specific content, program or TV station is more or less popular / acceptable in a given target group compared to general population.
4. **SOV** – share of viewing – expressed as percentage showing what portion of total viewing a channel, group of channels or a program is taking.
5. **Rating** – average rating shows a percentage of total audience or target group that was generated by a program.

2.1 FOUR DIFFERENT TYPES OF TELEVISION CHANNELS.

Principles of their behaviour and quantification of audience distribution between them.

In my mind, the starting point for a systematic television analysis is to establish the key categories, or types of television stations. Otherwise the process will be too fragmented, scattered and very difficult to establish the patterns and draw conclusions. When talking about the history of television it already became clear that there are different types of channels in the area of television within every country. They differ in the ways that they emerged during the formation of current television landscapes and their primary sources of income. Their ambition and behavior is also different. Talking about different types of television channels Zygintas Peciulis identifies two ways of grouping TV stations (Peciulis, 1997):

a) based on the ownership and relation to the state;
b) based on the programming style;

He identifies 3 types of television channels based on the ownership structure – public broadcaster, commercial television and pay TV. He also shows the differences between the typical viewers for each type of television and the revenue formula.

a) Public broadcaster. Viewer – a citizen. Formula – pays even if doesn't watch.
b) Commercial television. Viewer – consumer. Formula – pays when does laundry, not when watching.
c) Pay TV. Viewer - a fan. Formula - pays for what he watches.

Based on programming styles Peciulis identified 3 types of channels:

a) Universal. Channels - institutional, commercial, family and female, experimental.
b) Thematic. Channels – movies, sports, music, information, culture, other specialized.
c) Programs for foreign territories (ambassadors). Examples BBC World, TV Polonia, TV5.

I used this differentiation as a starting point for my logic of grouping TV stations. However I wanted to take both approaches into account at the same time and also have more weight ascribed to the country of origin (national vs. external) and type of license for distribution (national terrestrial vs. limited penetration / cable satellite). As a result it most logical to group all channels into 4 segments:

1. National commercial broadcasters.
2. National public broadcasters.
3. Thematic and regional terrestrial commercial broadcasters.
4. Cable and satellite channels.

Segment 1: National commercial broadcasters.

These are commercially owned TV stations that received national full format licenses when the deregulation and commercialization of television took place within individual country. Today they most often dominate viewing time among mass audiences in the Baltic region. This segment has exclusive position as licensing mechanism controls the number of such channels on the market, at the same time they are only to a small degree threatened by the segment of cable and satellite channels coming from outside. Looking at the ownership – in most cases these are TV stations that are partially or completely owned by international media groups. They are guided by commercial interests in first place with the main source of income coming from advertising. In relation to the viewers they have a silent pact – deliver what audiences want in exchange for airing commercials. They are different from public broadcasters in company philosophy – with commercial interests in mind these channels are achieving higher viewing shares using less people and smaller material base compared to public broadcasters. Appreciation by the mainstream audience is the key success factor in order to achieve dominance in the viewing shares and translate it into commercial success by gaining adequate investment from advertisers. Since most of these channels are owned by international companies, which are trading on the stock market – quarterly, half year and annual financial results are important factors shaping their behavior.

Segment 2: National public broadcasters.

This segment is the oldest one within every country – it was the state that launched television in the framework of national state and targeted its own citizens. This segment traditionally enjoyed rather long period of monopoly. It is usually financed by the state budget, television fees and possibly combined smaller advertising revenues. Compared to the other segments it is not only different by ownership (public vs. private) and financing models, but also by the tasks it is expected to carry. It is rather common that when state broadcaster receives higher ratings it is accused of being low quality. In other words – along with public financing it also gets public expectation to meet higher standards than commercial broadcasters. It is different from country to country and quite often rather subjective when the "criteria" of quality for public broadcaster is set. Still in my view the most common attributes can be associated with the keywords of "informative" and "educational" or "intelligent". Traditionally state broadcasters enjoy biggest material base in each country – biggest office buildings, studios, technologies and highest number of employees. Their success is not measured by commercial sense alone (if at all), but rather by how successfully they perform their mission.

Segment 3: Thematic and regional terrestrial commercial broadcasters.

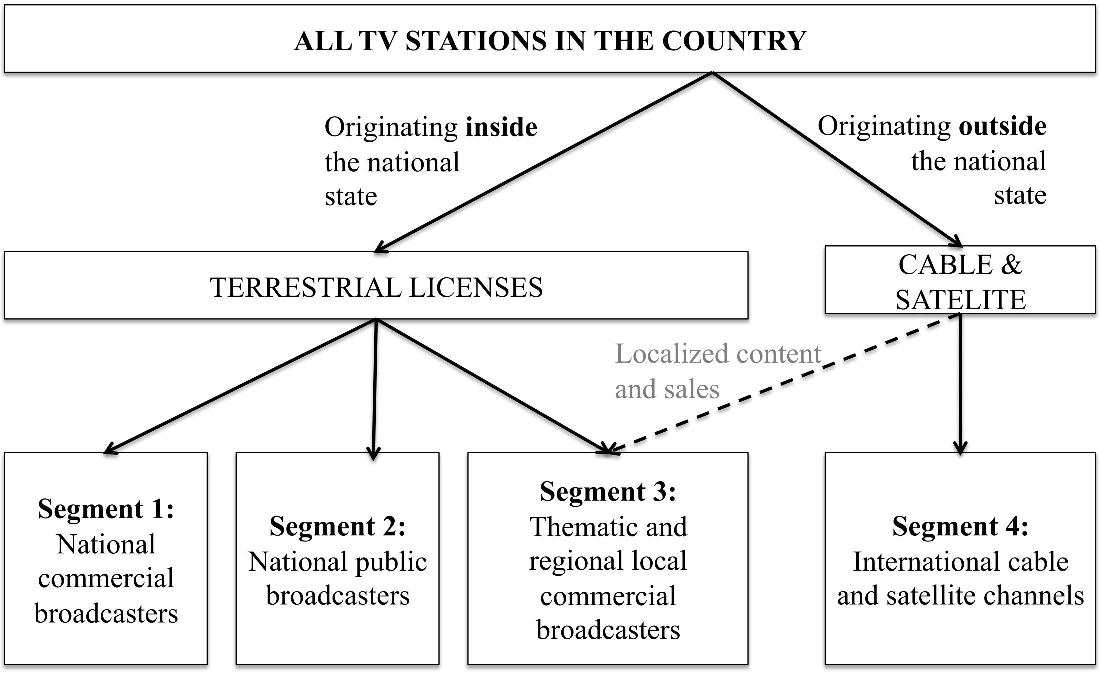
This is a segment very much similar to segment 1 – they also have terrestrial licenses (can broadcast outside and independently of cable/satellite universe) i.e. by definition they are local TV stations, originating from within the country. The difference – they may not have a full format license – are not allowed to broadcast in the same way as national terrestrial TV stations, but rather have to follow a certain central theme (e.g. regional, sports, news, youth, etc.), or may not have actual national distribution yet (e.g. built from a number of small regional stations). From the ownership point of view part of them belong to the same owners as channels in segment 1 (commercial broadcasters) – in this respect together they form the family of channels. And though in this case all the drivers and company philosophy is the same as for the main TV station that they are affiliated with, the difference comes from the type of audience they target – try to talk to – it is more narrow, niche, specific in comparison to broad and mainstream for the segment 1. From the viewer point of view these channels are perceived as alternative and niche. For these reasons I keep them as separate group from segment 1.

Segment 4: Cable and satellite channels.

This is the most international segment in each country. No matter if it is broadcasting in local language or if it delivers subtitled programs, it is more common for these channels to be originating from outside of national state. They are clearly profiled, smaller and fragmented channels within the country. Since the signal is delivered via satellite and it covers many countries at the same time – the strength of such channels is large footprint – getting a small part of attention within each country, but accumulating large audiences across more territories. These are also commercial players in most cases with the key difference from segment 1 and 3 – their revenue is mainly depending upon the fees that come from the viewers in the form of payment for their cable service or a subscription card for a satellite dish. In this case advertising revenue is only a supplement, additional income. The main pact between the channel and the viewer is not in getting free content in exchange for advertising, but paying for the content that is matching the interests of the viewer which are not fully satisfied only by free TV stations (more channels, more diversity, bigger number of specific topics covered). In other words – providing more diversity and bigger choice.

Chart 2.1.1 shows the schematic relationship between these 4 segments.

CHART 2.1.1
FOUR TYPES OF TELEVISION STATIONS IN ANY GIVEN COUNTRY



A natural question is how viewer audiences are split between these segments. Table 2.1.2 shows average distribution of the share of viewing between these 4 segments among the 5 countries over the period of the last 5 years based on the data from TV meter surveys. What we see is that in all of the countries the biggest volume of general audience is attracted by segment 1 national – commercial broadcasters. Lithuania stands out compared to the rest in terms of the overall size of this segment – Lithuania 56.2%. Scandinavian countries are different by stronger position of public broadcaster (30-40% of general audience) compared to an average of around 15% in the Baltics.

TABLE 2.1.2
TOTAL VIEWING SPLIT BY CHANNEL SEGMENTS - 5 YEAR AVERAGE
(national share of viewing; target group: all 4+; 2005-2009)

Average SOV 2005-2009		Segment 1 National commercial channels	Segment 2 Public broadcasters	Segment 3 Local & regional TV stations	Segment 4 International cable & Satelite channels
BALTICS	LITHUANIA	56.2	14.4	10.4	19.0
	LATVIA	36.5	15.8	20.2	27.4
	ESTONIA	39.4	16.7	20.2	27.5
SCANDINAVIA	DENMARK	32.9	30.2	22.8	14.1
	NORWAY	35.5	40.9	11.0	12.5

Source: TNS TV meter surveys.

In my further analysis I will always treat segment 1 (national commercial broadcasters) and segment 2 (public broadcasters) as two separate groups, while sometimes combining segments 3 and 4 into a single category of alternative viewing.

2.2 AUDIENCES AND TV: DEFINING KEY INTERACTION MODELS

Cluster analysis of relationship of individuals and television – Lithuania 2009

In this chapter I test the hypothesis that “individuals within a nation state tend to relate to television in different ways. The differences are caused by demographic, socio economic and cultural factors”. My aim is to identify the different models in which audiences relate to television, measure and quantify them as well as look into the socio-economic reasons of such relationship. I believe that there are 3 groups of parameters that combined with each other provide the best definition of individual’s relation to television:

1. **Overall viewing intensity. It shows how important part of every day routine television plays in person's life.** In the analysis it is expressed as ATV (average time viewed) per day during the analyzed period for each individual. This will allow seeing the differences between medium, heavy and light TV viewers.
2. **Viewing distribution between 4 segments of TV stations** – **is it mainstream commercial, or more alternative choices that person prefers from the content he is offered.** This parameter is expressed as share of viewing attributed to each segment level during the analyzed period of time.
3. **Viewing distribution between genre categories – what dominant content categories are preferred from the choices offered.** It is expressed as a share of viewing on an individual level between genre categories on the main TV stations in the country.

I did the analysis based on data from Lithuania for 2009. Since viewing choices and preferences are individual and vary from person to person, the analysis is done on the level of individual – it looks into the viewing behavior of 932 panel members during 2009. I have chosen **two-step cluster** analysis in order to identify the different patterns of relation between viewer audiences and television based on three sets of variables described above. The reason for choosing a two-way cluster is the total number of cases in my analysis (932) – it is too big to process using hierarchical or K-means clustering.

For the results to be easier to interpret I reduced the number of genre categories, used in previous examples, by combining them into more aggregated categories. Detailed list of variables used for analysis, scales on which values are measured and average values in general population are presented in table 2.2.1.

TABLE 2.2.1
VARIABLES USED FOR CLUSTER ANALYSIS

Nr.	Detailed description of category	Scale Type	From	To
GROUP 1 - INTENSITY OF TOTAL TELEVISION VIEWING				
1	TOTAL TV - Avetage time viewed - minutes per day in 2009	Ratio	1	958
GROUP 2 - CHANNEL CATEGORIES				
1	Category 1: National commercial stations [LNK, TV3, BTV]	Interval	0	100
2	Category 2: Public broadcaster [LTV & LTV2]	Interval	0	100
3	Category 3: local niche stations [TV6, PBK, Lietuvos Rytas TV, TV1, 11K]	Interval	0	100
4	Category 4: all other - cable and satelite channels	Interval	0	100
GROUP 3 - GENRE CATEGORIES ON LOCAL STATIONS				
1	News	Interval	0	100
2	Series and movies	Interval	0	100
3	Talk shows and telenovellas	Interval	0	100
4	Animation	Interval	0	100
5	Entertainment	Interval	0	100
6	Educational	Interval	0	100
7	Game shows and music	Interval	0	100
8	Other interests	Interval	0	100

When talking about different types of viewers Zygintas Peciulis identified three core categories (Peciulis, 1997):

a) Mainstream viewers – the most numerous group. People of various education, but quite often is not very high. They are not very demanding. Most favorite programs are entertainment, game shows, series and humor.

b) The second group – wants to enrich their knowledge, get new information, likes critical comment and unexpected point of view. They are more demanding when choosing the type of entertainment – expect professionalism, quality and variety.

c) Intellectual elite - the least numerous group. These are people who frequently tune in to TV, but they are also the most demanding and the most critical ones. Most often they are not satisfied with the quality of television, but intellectuals have the biggest influence when forming the public opinion and the strategy of TV stations.

I found this argumentation a useful starting point and kept it in mind when performing my analysis. At the same time I felt too generalist and also I could not agree on the level of importance ascribed to the intellectual elite in forming the public opinion related to television as well as the strategy of TV stations (especially commercial and thematic channels).

During the analysis I found the best way to group cases into 9 clusters – models. See table 2.2.2 for the results of the analysis. For clearer interpretation of the results I also arranged models into 4 logical blocks that define the overall direction of relation between a person and television:

BLOCK - 1. INTELECTUAL (12% of cases) – only model #1. It is very clearly differentiating from all others.

BLOCK 2 – MAINSTREAM (41% of cases) – models #3, #4 and #6 – with clear focus on local commercial TV stations, but within the group models differ by overall intensity of interaction with television (ranging from model #3 with 25% lower average time viewed than general population, to model #6 – with 29% higher average viewing time). They also differ according to the content expectations and position of public broadcaster (being strongest in model #3 and weakest in model #6). This decline of the importance of public broadcaster between the models is also mirrored in the declining importance of the news content in the respective models.

BLOCK 3 - TRANSITIONAL BLOCK (26% of cases)

This block contains two models – #5 and #8. Both models are similar in terms of weak role of the public broadcaster, with commercial channels on similar levels as in general population, but increasing importance of alternative channels. They also show very weak content expectations related to the news and are focused on two key content categories – movies and series (model #5) and animation (model #8). I called it transitional since people in this group can be moving towards both – more mainstream models (e.g. kids, when they grow up and move from animation towards broader spectrum of content) and vice versa – people who do not find sufficient offer on the main commercial and public broadcaster channels can be moving towards the models that are stronger focused on niche channels.

BLOCK 4 - FOCUS ON ALTERNATIVES (20% of cases)

The bock contains three models – 2, 7 and 9. For all of them a common characteristic is to have higher viewing shares concentrated in the segment of local and foreign niche channels. Model 2 is also a bit similar to model 1 in terms of relationship between commercial and public broadcasters. Model 7 is the smallest one (only 2%) but always emerges as a separate cluster without respect of how many clusters are identified during the analysis.

The core blocks that were identified during my analysis share some similarities as well as some of the differences compared to the basic groups of viewers mentioned by Peciulis.

Though I started from a complete scratch, the most vivid block that was identified was the 'intellectuals' – who have complete different taste and viewing behavior compared to the rest of the audiences. It is also not the most numerous block. This is very similar to Peciulis' argumentation.

Mainstream block also emerged rather clear. Where the difference occurs is that in my analysis it became evident that there are substantial differences within the mainstream block as well and it should be treated as a block of different ways in which audiences relate to television, rather than a single group.

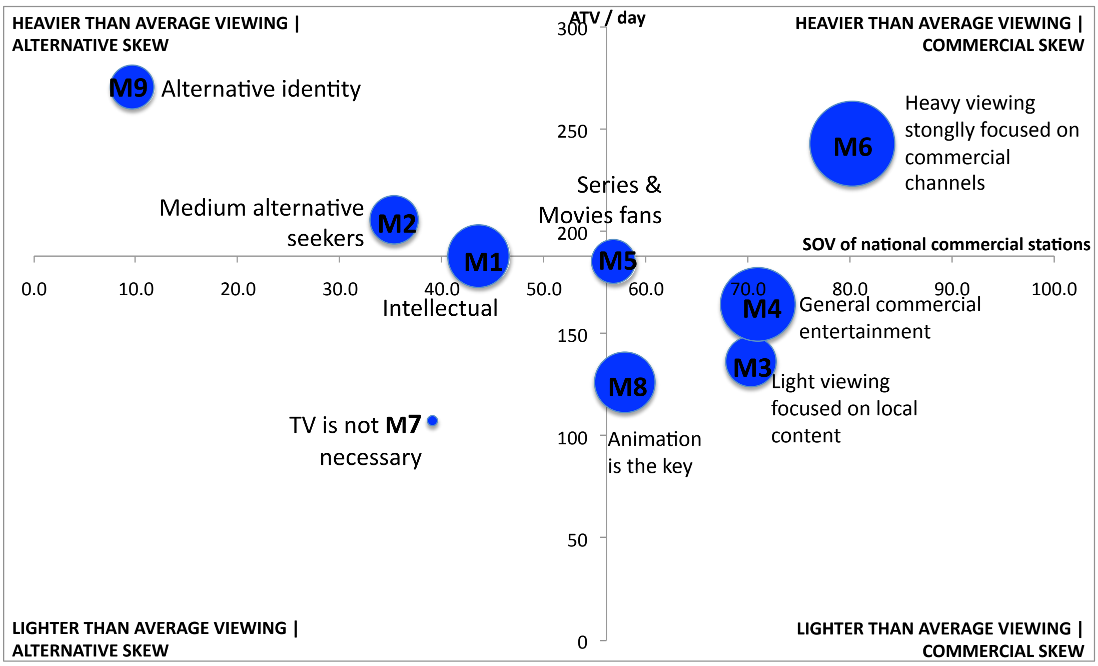
TABLE 2.2.2
NINE MODELS OF TV AND AUDIENCE RELATIONS
(LITHUANIA, 2009)

		INTELECTUAL	MAINSTREAM BLOCK			TRANSITION TO ALTERNATIVES		FOCUS ON ALTERNATIVES			
		12%	41%			26%		20%			
		M1	M3	M4	M6	M5	M8	M2	M7	M9	ALL
		Intelectual viewing	Light viewing focused on local content	General commercial entertainment	Heavy viewing strongly focused on commercial channels	Series and movies fans	Animation is the key	Medium alternative seekers	TV is not necessary	Alternative identity	TOTAL POPULATION
	Number of cases in the cluster	115	94	136	155	130	111	91	19	81	932
	% of cases	12	10	15	17	14	12	10	2	9	100
Intensity of television viewing	Average minutes per day	188	136	164	243	185	126	206	108	270	188
Split between TV segments	Commercial channels	**43.6**	**70.3**	**71.0**	**80.2**	**56.9**	**57.9**	**35.3**	**39.0**	9.7	56.1
	Public broadcaster	**38.9**	21.0	14.5	11.1	8.4	5.5	12.3	8.0	2.4	14.3
	Local and international niches	17.5	8.7	14.6	8.7	**34.7**	**36.6**	**52.4**	**52.9**	**87.9**	29.6
Split between agregated content categories	News	38.9	24.5	19.4	16.7	13.4	8.0	25.1	11.5	27.0	20.7
	Series and movies	13.8	14.3	27.2	23.2	39.7	21.4	19.9	13.3	28.7	23.8
	Talk shows and telenovellas	7.0	8.3	6.0	14.8	5.8	6.1	4.9	13.0	9.0	8.1
	Animation	1.6	2.6	6.1	12.6	10.6	41.8	4.4	6.6	3.1	10.7
	Entertainment	13.2	19.6	19.6	14.1	13.4	10.2	17.8	27.5	15.4	15.5
	Educational programs	12.5	12.0	11.4	7.9	8.0	5.3	15.4	6.4	8.3	9.8
	Game shows and music	9.6	15.4	6.2	8.0	4.4	4.0	6.4	6.1	5.0	7.2
	Other interests	3.4	3.4	4.1	2.6	4.7	3.3	6.3	15.9	3.5	4.1
		INDEXES VS ALL									
Intensity of television viewing	Average minutes per day	100	73	87	129	98	67	109	57	144	
Split between TV segments	Commercial channels	78	**125**	**127**	**143**	**101**	**103**	63	70	17	
	Public broadcaster	**273**	147	101	78	59	38	86	56	17	
	Local and international niches	59	29	49	29	**117**	**124**	**177**	**179**	**297**	
Split between agregated content categories	News	187	118	94	81	65	38	121	55	130	
	Series and movies	58	60	115	98	167	90	84	56	121	
	Talk shows and telenovellas	86	103	74	183	72	75	60	160	112	
	Animation	15	24	57	118	99	390	41	62	29	
	Entertainment	85	126	126	91	87	66	115	177	99	
	Educational programs	127	122	116	81	82	54	156	66	84	
	Game shows and music	133	213	86	110	61	55	88	84	69	
	Other interests	84	83	101	64	114	80	155	391	85	

The other two blocks that were identified are also different from what Peciulis called "second group of viewers". In my analysis I called these blocks "transitional" – two groups of people who are different both from intellectuals and mainstream due to rather narrow and specialized expectations from television, and "focus on alternatives". The difference of "focus on alternatives" from the "second group" lies in the individual models that belong to this block. One of them is indeed a good match to "second group" – model #2, but the other two are rather different.

Chart 2.2.3 shows the graphical map of 9 models, representing the size of each type of relationship as well as relative distances between the models on the axis of average viewing intensity and orientation towards mainstream national commercial channels vs. the alternatives (public broadcaster and cable & satellite channels).

CHART 2.2.3
MAP OF MODELS – SIZE AND DISTANCES
(LITHIANIA 2009)



The axis on the chart cross on the average values among all cases creating 4 segments. The size of bubbles on the chart is proportional to the number of cases belonging to each cluster.
Let's explore each model in more detail.

GROUP 1 - INTELECTUAL

MODEL #1 (12%) – INTELECTUAL VIEWING

Medium overall television viewing intensity. Heavily skewed towards public broadcaster (2.7 times higher viewing hares compared to average among all). Because of overall dominance of commercial stations they still have highest average share of viewing (43.6%) split between 3 commercial stations, but public broadcaster is very close to that number with only one main and one small secondary channel (38.9%).
These people treat television as "cool"/engaging medium with news as preferred content (38.9% share within target group and index 187 compared to general population). They also expect from television educational and informative programs as game shows. Animation – is the most alien television content for them.

GROUP 2 – MAINSTREAM VIEWING

Second, and most numerous group consisting of three audience and television relation models that are best described as mainstream.

MODEL #3 (10%) – LIGHT VIEWING FOCUSED ON LOCAL CONTENT

Lighter than average overall television viewing (index 73 vs. total). Compared to general population, these people are heavier viewers of local national TV stations – both public (index 147) and commercial (index 125). Do not seem to have real alternatives or to choose them – local niche and cable/satellite segment is of very low importance (index 29). On the content side these people appreciate game shows and music. They like general entertainment as well as educational segment and news. Their attitude towards telenovelas and talk shows is rather neutral – similar averages to general population. What they do not like are series, movies and animation.

MODEL #4 (15%) – GENERAL COMMERCIAL ENTERTAINMENT

Overall television viewing slightly lower than average (index 87). Do not have or find real alternatives on local niche channels or cable/satellite channels (index 49). They treat public broadcaster just as general population does (index 101) and are most skewed towards commercial channels (index 127). News is of average importance. Much more preferred content is movies and series (index 115), general entertainment (index 126) and educational category (116). Most distant content is talk shows and telenovelas (index 74) as well as animation (index 57).

MODEL #6 (17%) – HEAVY VIEWING STRONGLY FOCUSED ON LOCAL COMMERCIAL CHANNELS

The most numerous cluster -17%. It is also representing the second heaviest overall television viewing among all clusters – average just over 4 hours per day (index 129 vs. average). Viewing is very heavily skewed towards commercial stations (index 143) while public broadcaster (index 78) and other local and international niche channels (index 29) are not considered to be important. On the content side the two most heavily appealing categories for this cluster compared to overall averages are talk shows and telenovelas (index 183) and animation (index 118). All other main content categories are on similar averages as in general population. These people are also least inclined to look for content in smaller niche genres (index 63 – lowest among all clusters).

GROUP 3 – TRANSITIONAL VIEWING

Two models belong to this group - #5 – “Series and movies fans”, and # 8 – “Animation is the key”. Both models represent the relationship between audiences and television best described as “transitional” since it is neither typical for mainstream, nor for "alternative" ends of an axis, but rather a position in between.

MODEL#5 (14%) – SERIES AND MOVIES FANS

The key difference from other models – a clear focus on series and movies as key content these people expect from television (index 167). News is not important (index 65) as well as talk shows or telenovelas (index 72). All other content categories on main stations are slightly below averages. They also are slightly more inclined to look for more alternatives in other niche categories.

Overall television viewing is just on average compared to general population (index 98). So is the viewing of commercial channels (index 101). Since content expectations are focused on movies and series, the position of public broadcaster is weaker than in general population (index 59), instead they spend the time that would be given to public broadcaster looking into other local and international niche channels (index 117).

MODEL #8 (12%) – ANIMATION IS THE KEY

A rather numerous cluster (12%), characterized by one of the lowest overall television viewing (average 2 hours daily, index 67) with clear focus on animation (index 390). News is the least important among all content categories (index 38). They can also watch series and movies (index 90). Other than that all other content categories are of much less importance compared to general population. In the distribution of attention between the channel groups – public broadcaster is not interesting (index 38), while commercial channels are on the level of average significance (index 103) with higher importance of niche channels (index 124).

GROUP 4 - FOCUS ON ALTERNATIVES

A group combining three models that represent alternative behavior compared to mainstream viewing.

MODEL #2 (10%) – MEDIUM ALTERNATIVE SEEKERS

Medium overall television viewing. Do not find sufficient offer on commercial televisions (SOV index of commercial channel compared to general population is 63) so they are looking for alternatives. Public broadcaster is slightly more acceptable, but still below average compared to the rest of population (index 86 vs. general population). These people find best choices on local niche and cable and satellite channels. On national channels they watch the news, educational programs and documentaries as well as other, more specialized content (sports). Entertainment shows are also interesting. What they definitely do not like are talk shows and telenovelas as well as animation. This cluster in a way resembles cluster 1, but in my mind it is reflecting the key switch to alternative viewing compared to main TV stations (local and international niche channels are 52.4% of viewing), for this reason I put it into 4-th group – "Alternative viewing'.

MODEL #7 (2%) – TV IS NOT NECESSARY

The least numerous cluster, which always emerges, no matter what total number of clusters was selected for analysis. Overall weakest relation to television marks it in general (average time watched per day is less than 2 hours) and to local mainstream commercial channels (index 70) as well as public broadcaster (56). In the time spent watching TV these people do not look for the news on main channels (index 55), they look for pure entertainment (index 177), dose of emotions (talk shows and telenovelas – index 180) and most actively explore other smaller content niches (index 391). Their viewing is also more focused on local and international niche channels (index 179).

MODEL# 9 (9%) – HEAVY EXTERNAL ALTERNATIVE SEAKERS

The cluster most focused on local and cable / satellite niche channels (index 297). In this respect these people are also similar to cluster 7. However they are different both in terms of intensity and importance that television plays in their daily routines and content choices. This cluster is the cluster of heaviest television viewers (index 144) who spend in average 4.5 hours watching television. At the same time these people find almost 88% of their content away from main local commercial and public channels. The content they are looking for is focused on 3 most popular content categories on television – news, series and movies and talk shows and telenovelas.

Exploring the socio demographic composition of models

The definitions of groups and models above explain the differences in the behavior of people when it comes to the overall importance of television viewing in their daily routines, as well as the choices they make based from the available options in selecting channels and content. The models were created based on the behavior of individuals, now let's look into their differences in demographic composition.

Table 2.2.4 shows the composition of each model by key demographic variables. It should be read in a vertical way.

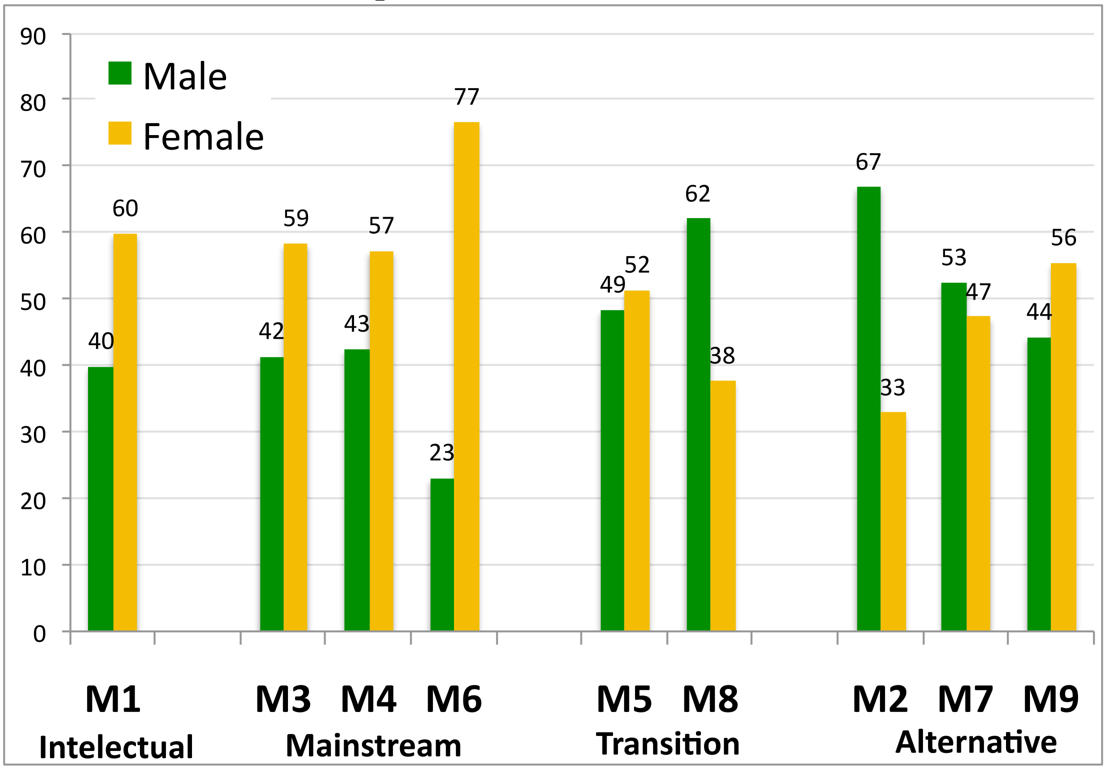
TABLE 2.2.4
DEMOGRAPHIC STRUCTURE OF EACH MODEL
(in percent within model)

		INTELECTUAL	MAINSTREAM BLOCK			TRANSITION TO ALTERNATIVES		FOCUS ON ALTERNATIVES		
		M1	M3	M4	M6	M5	M8	M2	M7	M9
	% of cases in block	12.3	41.3			25.8		20.5		
	% of cases in cluster	12.3	10.1	14.6	16.6	13.9	11.9	9.8	2.0	8.7
		% of cases within each cluster by demographic variables								
SEX	Male	40.0	41.5	42.6	23.2	48.5	62.2	67.0	52.6	44.4
	Female	60.0	58.5	57.4	76.8	51.5	37.8	33.0	47.4	55.6
AGE	4-7	0.0	0.0	2.9	4.5	3.1	31.5	1.1	0.0	3.7
	8-14	0.0	5.3	5.9	13.5	9.2	49.5	3.3	5.3	0.0
	15-24	3.5	11.7	17.6	21.3	24.6	14.4	14.3	31.6	11.1
	25-34	4.3	6.4	16.9	7.1	21.5	2.7	12.1	26.3	17.3
	35-54	27.0	29.8	43.4	25.8	33.1	0.9	50.5	26.3	29.6
	55+	65.2	46.8	13.2	27.7	8.5	0.9	18.7	10.5	38.3
Urbanization	Urban	72.2	61.7	53.7	49.7	66.9	60.4	79.1	73.7	84.0
	Rural	27.8	38.3	46.3	50.3	33.1	39.6	20.9	26.3	16.0
Language at home	Lith.	98.3	96.8	98.5	92.3	95.4	87.4	89.0	68.4	40.7
	Non-Lith.	1.7	3.2	1.5	7.7	4.6	12.6	11.0	31.6	59.3
TV reception	Analogue	50.4	69.1	58.1	67.1	45.4	41.4	19.8	26.3	0.0
	Multichannel	49.6	30.9	41.9	32.9	54.6	58.6	80.2	73.7	100.0
Social class	A-B	31.3	16	22.8	14.8	36.9	18	30.8	21.1	8.6
	C1	30.4	7.4	22.1	11	13.8	16.2	29.7	15.8	32.1
	C2	27.8	55.3	48.5	58.7	45.4	55	29.7	57.9	53.1
	D-E	10.4	21.3	6.6	15.5	3.8	10.8	9.9	5.3	6.2
Education of main income earner in HH	Primary	1.7	15.2	9.2	24.3	18.5	68.8	4.5	10.5	2.6
	Basic (incompl. sec.)	6.1	10.9	11.5	15.3	9.7	16.7	9.0	0.0	14.1
	Secondary	15.7	25.0	19.2	31.2	21.0	6.2	14.6	42.1	34.6
	Special secondary	33.9	34.8	32.3	24.3	30.6	8.3	40.4	10.5	26.9
	High	42.6	14.1	27.7	4.9	20.2	0.0	31.5	36.8	21.8
Average income per household member	Under 400	6.1	21.3	12.5	30.3	19.2	30.6	11.0	5.3	8.6
	401-600	20.0	27.7	30.1	26.5	25.4	27.0	16.5	26.3	30.9
	601-800	18.3	25.5	19.1	21.9	14.6	18.0	16.5	42.1	25.9
	801-1000	13.9	11.7	16.2	5.2	13.1	13.5	16.5	5.3	9.9
	1001+	41.7	13.8	22.1	16.1	27.7	11.9	39.6	21.1	24.7

Source: TV Meter surveys

For easier interpretation of the data I expressed the structure of each model in each of the main categories in a graphical way, which is presented in the following charts.

CHART 2.2.5
COMPOSITION OF MODELS: SEX
(in percent within each model)



Source: TV meter surveys

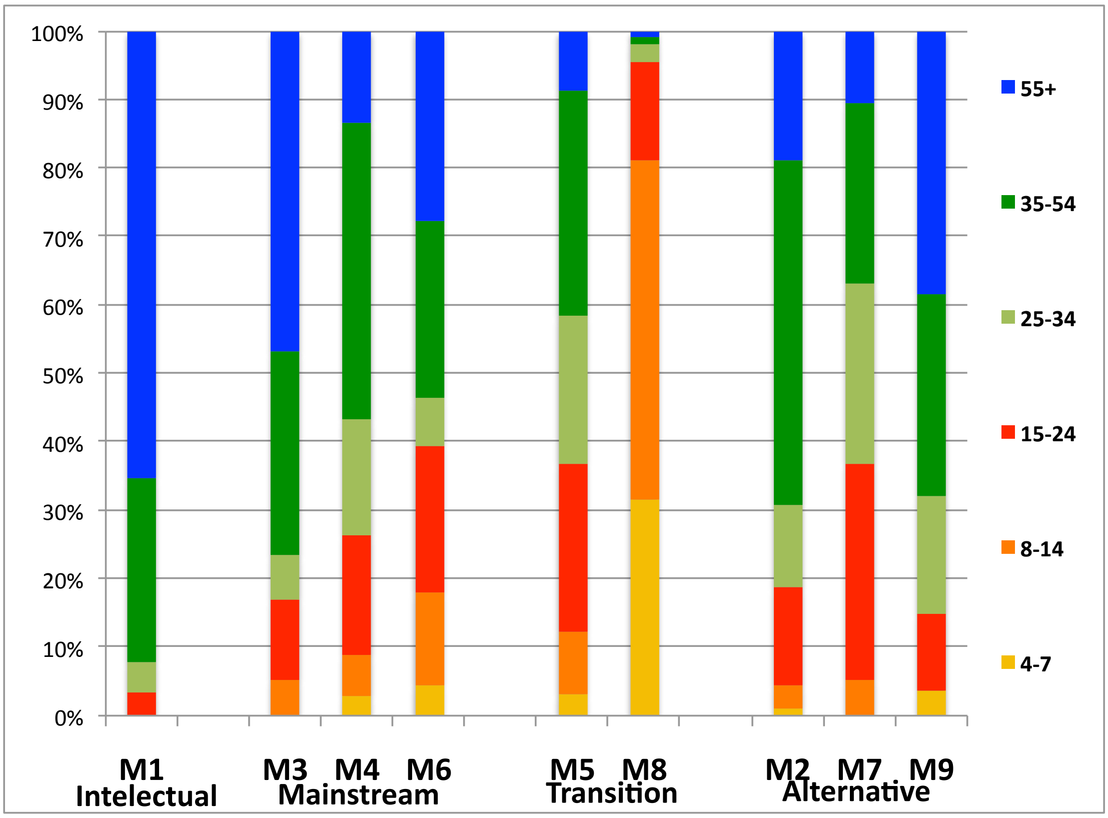
Looking at gender splits within each cluster we can see that all models belonging to the mainstream block are more female dominated, with the most numerous model - 6 “Heavy viewing strongly focused on commercial channels” – being the most female dominant in its composition (77% female vs. 23% male). That shows overall communication of national commercial TV stations being targeted at female audiences. “Intellectual” model (#2), though being different from mainstream when it comes to selection of the content and channel preferences is similar in terms of female vs. male composition with females representing 60%.

All more male dominated models are to the right part – in transition or alternative group. Model #2 “Medium alternative seekers” is the most male in its composition, followed by model #8 “Animation is the key” – which is reflecting earlier finding that animation is more popular content among boys compared to girls.

Model #9 “Alternative identity” in this case is closest to natural demographic split between males and females, indicating that while this cluster is more affected by other parameters, the alternative skew towards models #5, #8, #2 and #7 is coinciding with higher proportion of males in these groups.

Lets look at cluster composition by age. There are 3 models that are dominated by older people (55+). M1 “Intellectual” - where more than 60% of people are older than 55 years. This is followed by model #3 – “Light viewing focused on local content” – slightly less than half people are older than 55. The third oldest according to age structure is model #9 – “Alternate identity”. Older people also have bigger influence in model #6 “Heavy viewing strongly focused on commercial channels”.

CHART 2.2.6
COMPOSITION OF MODELS: AGE
(in percent within each model)



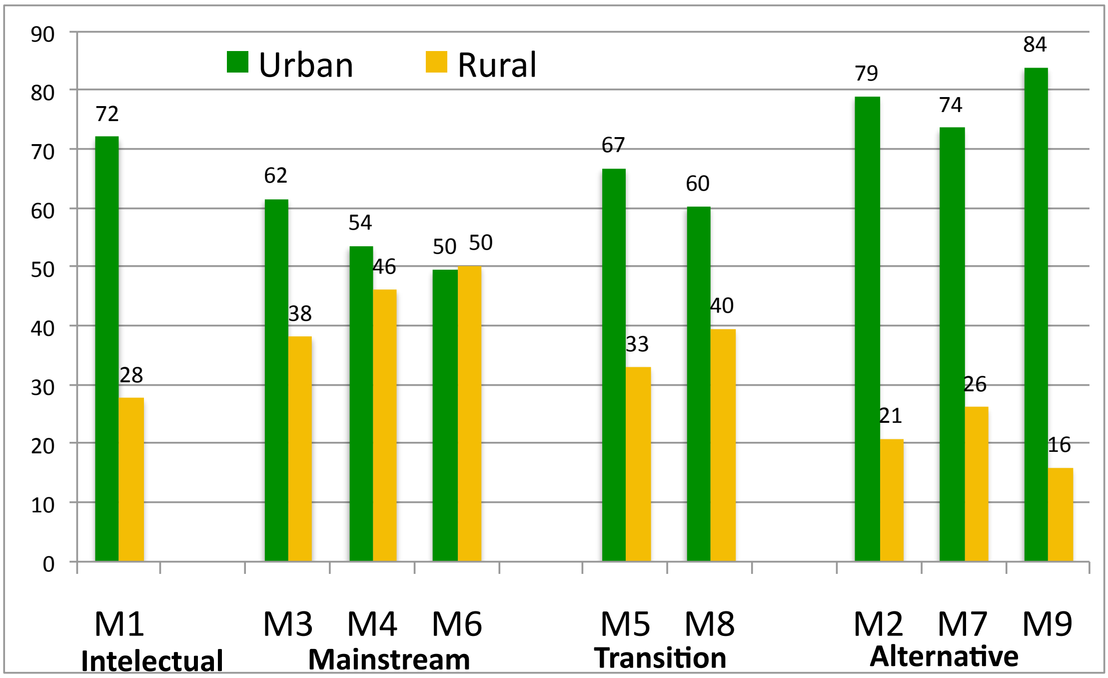
Source: TV Meter surveys

The youngest models in terms of age composition are transition ones - M8 “Animation is the key” being naturally dominated by children, teenagers and young adults. Models #5 “Series and movies fans”, M6 “Heavy viewing focused on commercial channels” and M7 “TV is not necessary” have higher proportion of children, teenagers and young adults (15-24) compared to the others.

The two adult target groups between 25 and 54 are well represented in the mainstream viewing models as well as in alternative or transitional (except for M8) groups.

Table 2.2.7 shows the demographic composition between urban and rural populations within models. I do not differentiate between big and small towns and consider them to be urban population. Rural population in this split is settlements of 2.000 people or less.

CHART 2.2.7
COMPOSITION OF MODELS: URBAN vs. RURAL
(in percent within each model)



Source: TV Meter surveys.

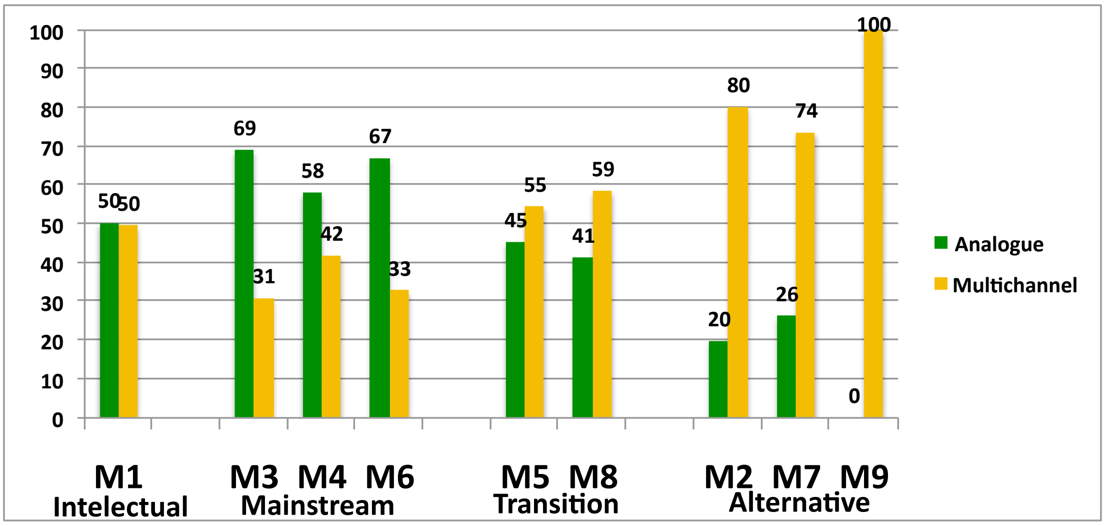
This chart clearly shows that most numerous mainstream model #6 “Heavy viewing strongly focused on commercial channels” is also most rural in terms of its composition.

At the same time the group of alternative viewing is more rural in its composition, so is model #1 “Intellectual”.

Model #3 “Light viewing focused on local content” is standing out from the other two models in this target group with higher proportion of urban population in its composition.

This suggests that mainstream vs. alternative group membership can also be influenced by the variety of alternatives for viewing available. It is easier to have multichannel reception and more options in urban areas compared to rural ones – chart 2.2.8 shows model structure by types of reception.

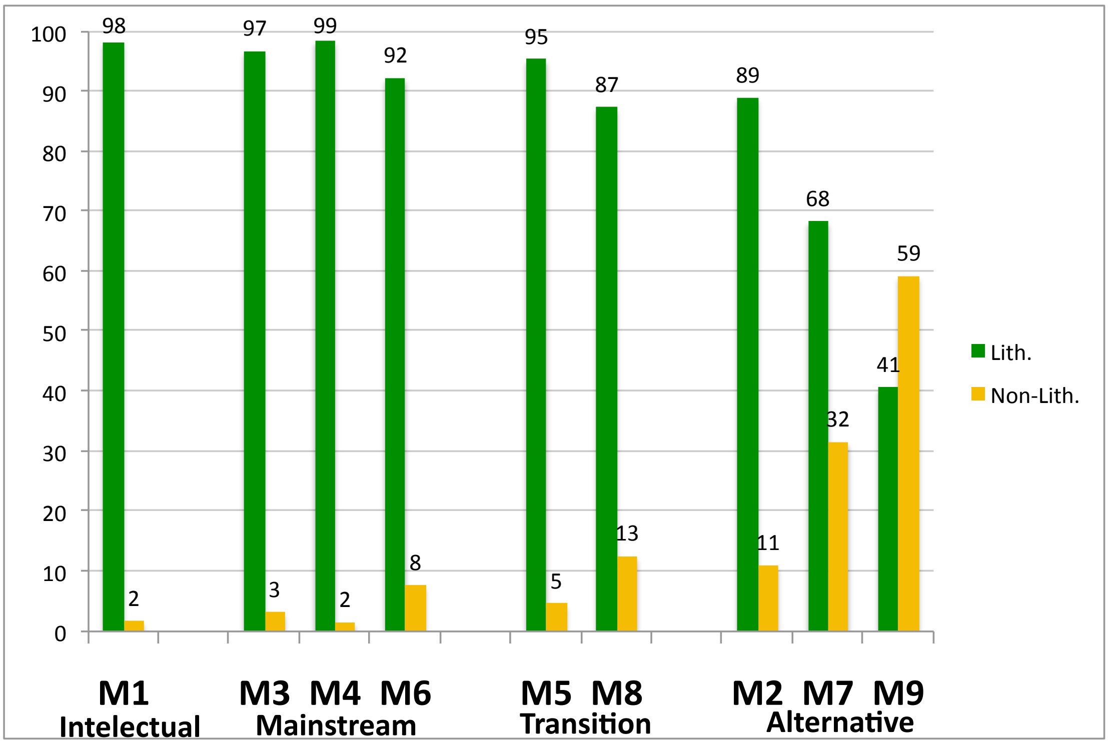
CHART 2.2.8
COMPOSITION OF MODELS: TYPE OF RECEPTION
(in percent within each model)



Source: TV Meter surveys.

Alternative focus group naturally has higher proportion of multi channel reception with higher number of available choices available, whilst mainstream block has higher proportion of terrestrial reception. Transition block is in between the mainstream and alternative according to this split.

CHART 2.2.9
COMPOSITION OF MODELS: MAIN LANGUAGE AT HOME
(in percent within each model)

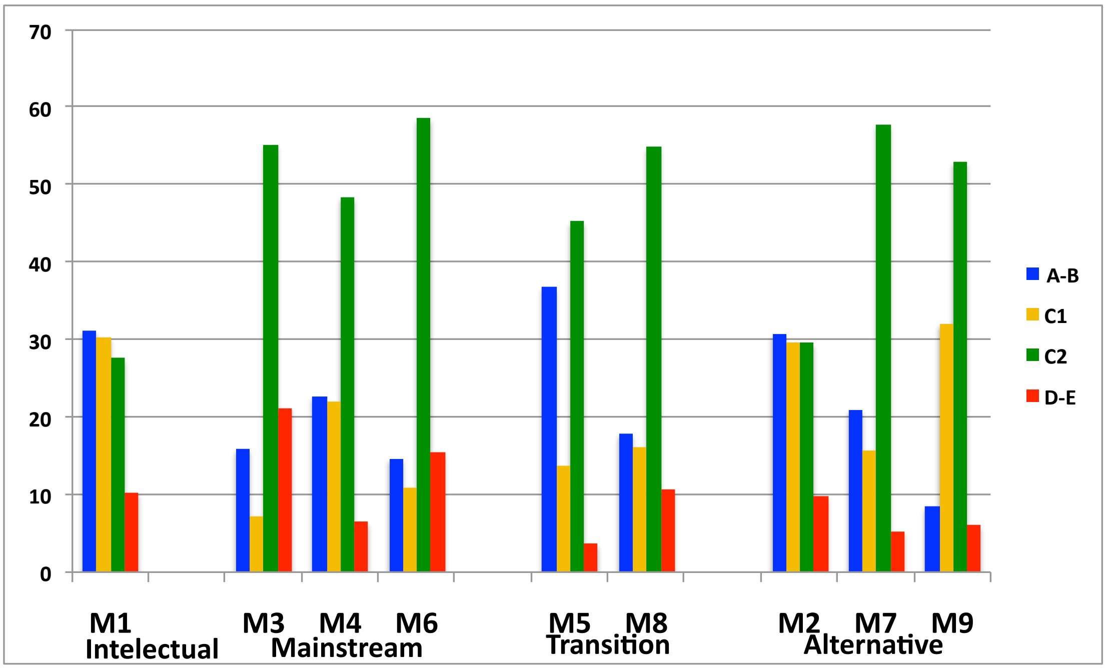


Source: TV Meter surveys.

Chart 2.2.9 shows composition of models by language used at home. It shows clear tendency of increasing importance of alternatives with increasing proportion of non-Lithuanians in the model. It also indicates one of the key reasons for model# 9 “Alternate Identity” to be so different in behavior compared to the others.

For a composition of models according to social classes see chart 2.2.10.

CHART 2.2.10
COMPOSITION OF MODELS: SOCIAL CLASS
(in percent within each model)



Source: TV Meter surveys

It shows that there are two models #1 "Intellectual" and #2 "Medium alternative seekers" which are most balanced in social group composition. All other has biggest part of people belonging to C2 social class. These two clusters also have highest proportion of people with high education (model #1 = 42.6%, model #2 = 31.5%). Model # 7 "TV is not important", being marginal, also has high percentage of people with high education 36.8%. The two models #1 and #2 also have highest proportion of people with highest average income per person (#1 = 41.7, #2 = 39.6%).

2.3 AUDIENCES AND TV: CROSS COUNTRY COMPARISON

Now that the different ways in which audiences relate to television within a single country have been established using Lithuania as a model, I move the focus on a broader picture – how a particular country fits into the broader European picture. I take basic parameters of television viewing in 30 European countries. This set of data is compiled from a secondary source – international key facts "Television 2009" published by IP. The main parameters used are:

1. ATV – average time viewed – how much time an average person in a target group spends watching television each day.
2. SOV – share of viewing split. This parameter shows how viewer attention during the time spent watching TV is allocated between 3 core segments of television channels – public broadcaster, national commercial stations and alternative channels (small local, regional and cable/satellite channels).
3. Level of economic development of a country expressed as average GDP / capita (in EUR) in that country.

Target group used in this comparison is the broadest adult target group available in the source. All data comes from the same source. Compiled results are shown in table 2.3.1.

My first assumption is that television plays more important social and economic role in the developing countries of Europe than in developed ones.

To analyze this assumption I break it into 2 hypotheses:

a) Social role of television: time that average person spends watching television is decreasing as the economic development of the country is increasing.
b) Economic role of television: in the countries with lower average GDP television takes higher share of advertising market than in the countries with higher average GDP.

The first point illustrates the social while the second – economic aspects of the statement. I use chart 2.3.3 to graphically illustrate the correlation between the average time spent watching television and average GDP per capita.

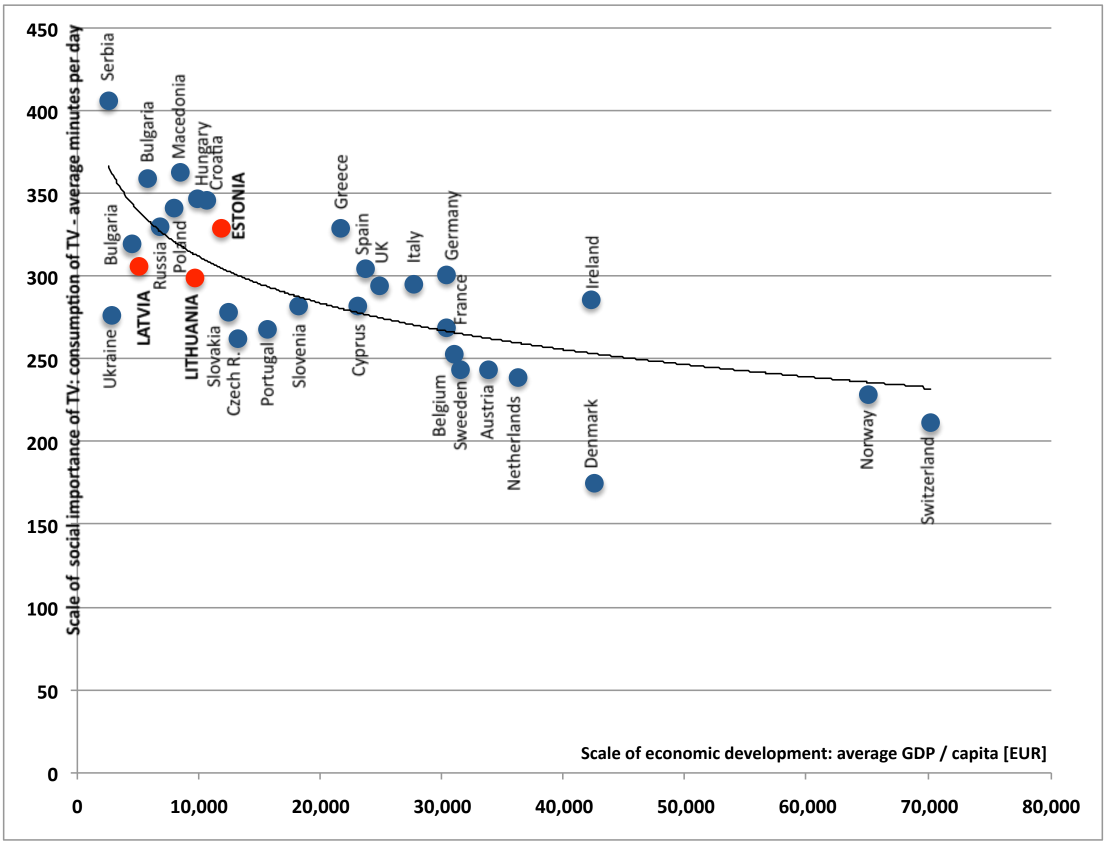
TABLE 2.3.2
TELEVISION VIEWING IN 30 EUROPEAN COUNTRIES
(in 2008)

Nr.	Country	Quoted target group	ATV	SOV Split			GDP / capita EUR
				Commercial	Public	Others	
1	Serbia	All 15+	406	42.2	37.3	20.4	2,577
2	Macedonia	All 15+	363	48.4	9.6	42.0	8,524
3	Romania	All 18+	359	55.8	5.4	38.8	5,804
4	Hungary	All 18+	347	60.4	16.5	23.1	9,894
5	Croatia	All 18+	346	40.2	49.1	10.7	10,637
6	Poland	All 16+	341	38.8	40.3	20.9	8,000
7	Russia	All 18+	330	38.9	48.2	12.9	6,737
8	Estonia	All 18+	329	41.4	16.5	24.9	11,833
9	Greece	All 15+	329	72.8	17.4	9.8	21,665
10	Bulgaria	All 15+	319	68.5	14.1	17.4	4,466
11	Latvia	All 15+	306	56.7	16.3	27.0	5,066
12	Spain	All 16+	304	50.3	36.7	12.9	23,726
13	Germany	All 14+	301	42.7	31.9	25.4	30,343
14	Lithuania	All 15+	299	52.7	14.1	33.2	9,662
15	Italy	All 15+	295	48.9	42.8	8.3	27,625
16	United Kingdom	All 16+	294	24.2	39.2	36.6	24,882
17	Ireland	All 15+	286	37.8	40.1	22.1	42,196
18	Cyprus	All 18+	282	52.7	22.1	25.2	23,100
19	Slovenia	All 15+	282	42.5	32.2	25.3	18,196
20	Slovakia	All 15+	278	53.7	22.7	23.6	12,466
21	France	All 15+	269	46.7	20.4	32.9	30,286
22	Portugal	All 15+	268	55.3	30.2	14.5	15,646
23	Czech Republic	All 15+	262	55.8	28.8	15.4	13,173
24	Belgium (North-Dutch speaking)	All 15+	253	38.7	40.5	20.8	30,990
	Belgium (South - French speaking)	All 15+	322	33.0	26.5	40.5	30,990
25	Austria	All 12+	243	40.4	41.9	17.7	33,820
26	Sweden	All 15+	243	50.6	30.9	18.5	31,509
27	Netherlands	All 13+	239	44.2	35.7	20.1	36,214
28	Norway	All 12+	228	40.1	35.8	24.1	64,964
29	Switzerland	All 15-74	211	29.4	32.2	38.4	70,080
30	Denmark	All 12+	175	21.8	60.9	17.3	42,515

Source: compiled from Television 2009, key facts, IP.
N.B. Not included: Belarus, Ukraine, Turkey, Luxembourg, Finland, and Iceland – due to incomparable measurement methods, unreliable market figures, or omitted viewing figures.

The amount of television consumption is a combination of number of factors, however TV viewing shows a correlation with the economic development of a country. In general countries with higher living standards tend to view less television than the ones with lower GDP per capita. The correlation is rather strong (Pearson's R=-0.77). Two highest deviations are Denmark and Ireland – both countries are on a similar living standards (42.000 Euro GDP/capita), but are very different in television viewing figures.

CHART 2.3.3
EUROPEAN TRENDS: TV VIEWING vs. GDP PER PERSON
(viewing – average per day in minutes, GDP – in EUR per person)

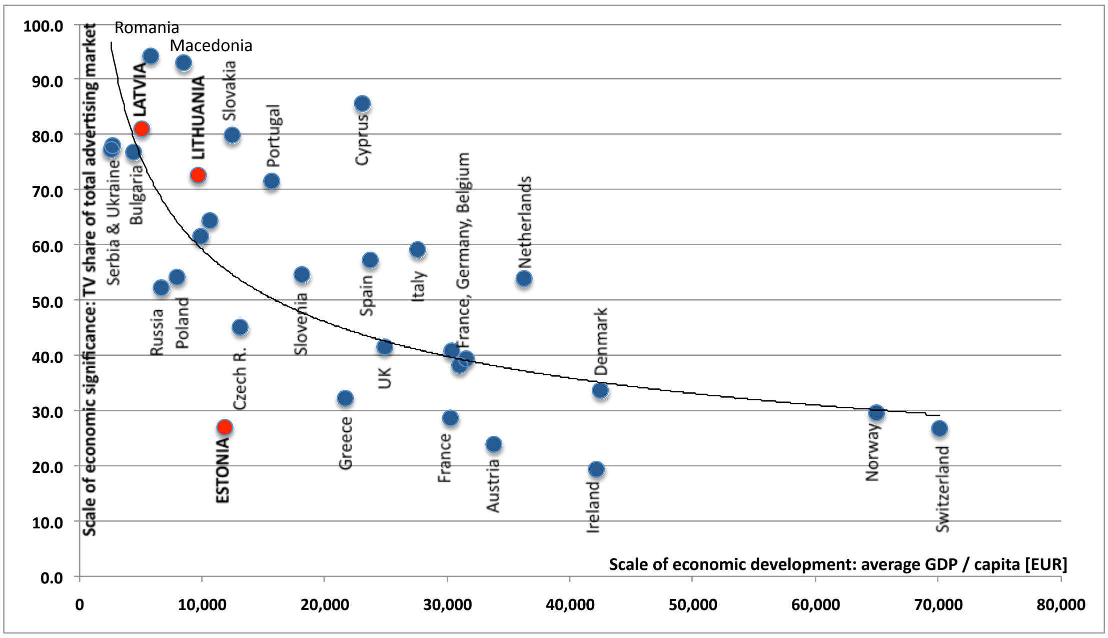


N=30, R= -0.77
Source: compiled from Television 2009, key facts, IP TV.

On one hand this proves that economic development is one of the factors determining how important role television plays in everyday life. On the other hand it does not show where the difference occurs and how it is reflected on the content of television in the country. This will be addressed in more details later. Another side of the same hypothesis is the role that television plays on the advertising market – i.e. I assume that in less economically developed countries television is more important part of economic chain and is able to attract higher shares of advertising investment than in more developed countries. I.e. in less economically developed countries television is “stronger” compared to other media than in more developed ones. Chart 2.3.4 shows the distribution of share of total advertising market going to television compared to GDP per capita in the country.

I believe this comparison is significant since it shows a general trend of decreasing economic significance of television on the advertising market when the level of economic development increases (R= -0.67). It also means that in less economically developed countries TV attracts higher share of available commercial funding – advertising revenue – and therefore leaves less commercial resources for other media to fight for public attention. This process in its own turn can be linked to the higher social significance of television in less economically developed countries. It is a bit of a chicken and egg situation since on one hand higher social importance of television can be reflected in higher commercial investments, on the other side – less commercial resources available to other media also mean that they are more limited in resources when fighting for public attention and increasing their social significance. Lower share of advertising market controlled by television in more economically developed countries is also coinciding with stronger role of the public broadcaster (which is often funded via license fees in these countries). See a separate chapter in this part related to the role of public broadcaster.

CHART 2.3.4
GDP PER CAPITA vs. TV SHARE OF TOTAL ADVERTISING MARKET
(in EUR and percent)

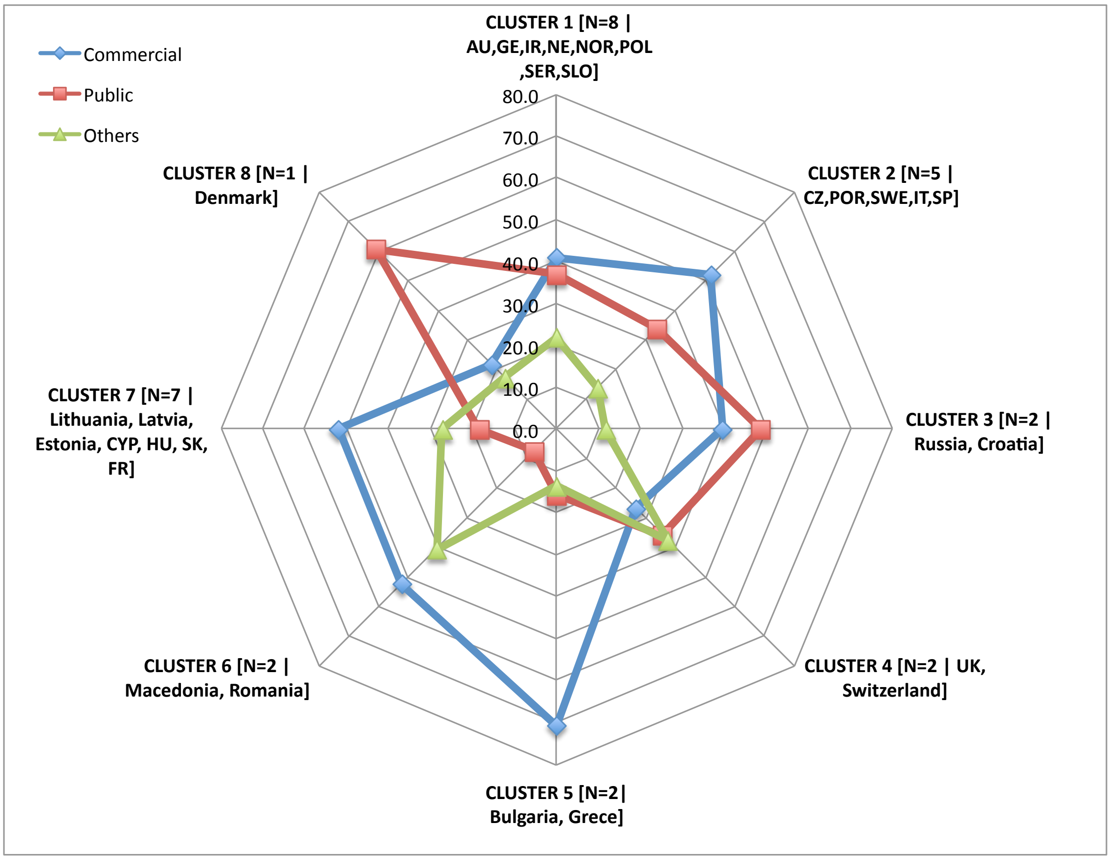


N=31, R= -0.67.
Source: based on IP figures.

Returning back to the main 3 segments of television broadcasters – commercial, public and other alternatives - I want to establish typical models of relationship between them in different European countries and see where do Baltic countries fit into the picture.

I used hierarchical cluster analysis in SPSS for this purpose with 3 variables – share of viewing in broadest adult target group within each segment. As a result of cluster analysis European countries can be grouped into 8 groups according to the balance, in terms of viewing, between the 3 sectors of television. The average position of commercial, public and other TV stations within each cluster are graphically expressed in Chart 2.3.6. There are 3 clusters with the main concentration of European countries – 20 out of 30 countries belong to these 3 groups – cluster 1, 2 and 7.

CHART 2.3.6
CENTROIDS WITHIN CLUSTERS



Source: from cluster based on IP figures.

CLUSTER 1 – COMMERCIAL & PUBLIC BALANCE

[8 countries – Austria, Germany, Ireland, Netherlands, Norway, Poland, Serbia, Slovenia]

The cluster is characterized by very similar positions of both commercial and public broadcaster segments. At the same time it allows for a reasonable choice of alternative – 20% of viewing. This is the most typical balance among 30 European countries – 8 out of 30 fall into this cluster.

CLUSTER 2 – DOMINANT COMMERCIAL WITH STRONG PUBLIC

[5 countries – Czech R., Portugal, Sweden, Italy, Spain]

Cluster 2 is similar to cluster 1 in terms of the position of public broadcaster – still strong, but commercial broadcasters have stronger position and are taking more viewing from alternative viewing TV stations. This is a 3-rd most widespread model – 5 out of 30 countries.

CLUSTER 3 – DOMINANT PUBLIC WITH STRONG COMMERCIAL

[2 countries – Russia, Croatia]

A small cluster with a relationship characteristic to two countries – Russia and Croatia. Alternative viewing is not significant. The main viewing is concentrated between public and commercial segments. Difference is small, but public broadcasters are dominant.

CLUSTER 4 - TRINITY BALANCE

[2 countries - UK, Switzerland]

The "Trinity balance" model is characterized by high alternative channel viewing – on the same level as commercial and public broadcasters. This is the case in UK and Switzerland.

CLUSTER 5 – COMMERCIAL. NO ALTERNATIVES.

[2 countries – Bulgaria, Greece]

Cluster characterized by over-dominance of commercial segment over everyone else. Public broadcaster is weak. Alternative viewing is also low. This model applies for Bulgaria and Greece.

CLUSTER 6 – WEAK PUBLIC BROADCASTER.

[2 countries – Macedonia, Romania]

In Macedonia and Romania the role of public broadcaster is very weak. Television is focused on commercial viewing (as in cluster 5), but with strong alternative viewing going to thematic cable and satellite channels.

CLUSTER 7 – COMMERCIAL WITH WEAK ALTERNATIVES

[7 countries – Lithuania, Latvia, Estonia, Hungary, Slovakia, France, Cyprus]

This cluster is second most numerous type of balance in Europe – TV is predominantly commercial with weak alternative from public broadcaster and growing alternative viewing from cable / satellite segment. All 3 Baltic countries belong to this cluster.

CLUSTER 8 – “IT’S DANISH, IT’S PUBLIC”

[1 country – Denmark]

Denmark is unique case in Europe with extremely strong public broadcaster role. Licensing rules within the country causes this.

The broad European comparison shown above gives a good picture on the key differences in European landscape. The weakness is that only very basic parameters can be compiled and used for this amount of countries and a secondary source has to be an intermediary. In order to go deeper into analyzing cross country differences and establishing more accurate models of relationship between audiences and television in a cross country perspective I return to the original 5 countries for which a raw TV meter data is available and extend the number of parameters to be used. I believe that the role that television plays for audiences in different countries can be best measured and compared on the following scales:

1. **Level of importance in daily routine** – how much time an average person spends watching TV each day.
2. **Engaging or wallpaper viewing** – expressed as ratio between prime time and off prime time viewing.
3. **Mainstream or fragmented individualistic**– measured as concentration of viewing within national stations (both commercial and public) compared to more individualistic, fragmented viewing within cable and satellite segments.
4. **Orientation towards information vs. entertainment axis.** I will measure that as a percentage that news broadcasts represent compared to general viewing.
5. **Relationship with key demographic groups.** Younger or older, more female or more male.

Averages for each country in are presented in table 2.3.7. Results for Lithuania are considered as a benchmark for my analysis and the results for other countries are displayed as both absolute number and an index compared to Lithuania.

Since television in every country initially emerged in completely national context, despite the increasing process of globalization it remains first of all a national phenomenon. The more variables are introduced, the more distinctions are evident. However I believe that certain general trends and systemized differences can be established.

TABLE 2.3.7
AUDIENCE RELATION TO TELEVISION MODELS: CROSS COUNTRY COMPARISON

						AS INDEX COMPARED TO				
	M#1:		M#2:"Highl	M#3:"D		M#1:		M#2	M#3:"De	
MEASURED AS:	Lithuania	Latvia	Estonia	Norway	Denmark	Lithuania	Latvia	Estonia	Norway	Denmark
SOCIAL AND ECONOMIC SIGNIFICANCE										
Social significance (Average time viewed)	3:25	3:42	3:53	2:53	3:10	100	108	114	84	93
Economic significance (Percent of total advertising market)	73	81	27	30	34	100	112	37	41	46
"WARM" / Walpaper vs "COOL" / Engaging MEDIA										
Percent of viewing generated in prime time (18-23)	45	46	43	54	53	100	102	96	120	118
AUDIENCE FRAGMENTATION (SOV split in %)										
Dominance of national commercial stations	52	32	34	29	29	100	62	66	54	56
Importance of public broadcaster	14	15	17	39	26	100	107	123	285	193
Other niche channels	34	53	49	33	44	100	156	144	96	130
INFORMATIVE vs ENTERTAINMENT FUNCTION										
Importance of the news. As % of total viewing.	22	29	n/a	25	n/a	100	133		112	
DEMOGRAPHIC ORIENTATION (age and sex)										
Younger vs older (% of ratings generated by 55+)	35	38	39	36	38	100	108	113	102	108
Females vs male (% of ratings generated by females)	57	57	58	52	53	100	101	101	91	92

Source: TNS TV meter surveys

Model #1: "Highly commercial" - Lithuania and Latvia.

Both countries are geographically, economically and culturally rather close so the television and audience relationship is also most similar, though with some key differences as well.

The common points are – television is very important part of daily routines – with 3:25-3:42 minutes of average viewing per day. Social significance of television is also mirrored in high economic significance – in both countries television is taking over 70% of advertising market, becoming much economically stronger compared to other independent media (print, internet, radio). This percentage is highest in both countries compared to any other country on the list. A very similar level of engaged viewing vs. wallpaper viewing in both countries – 45 – 46% of all ratings are generated during prime time hours. Key audiences that are building closest relationship with television are very similar in terms of being more female (57% of all ratings).

The two key differences are:

a) In Latvia audience fragmentation is much higher and position of national commercial stations is significantly weaker than in Lithuania. In my mind this is best explained by different demographic composition of Latvian population – with higher proportion of population concentrated in the main city, where multichannel environment is easier available compared to more geographically dispersed population in Lithuania. The second reason is higher percentage of Russian speaking population in Latvia compared to Lithuania, with natural increased attention to the information and entertainment coming from Russia via a number of cable and satellite channels.

b) Despite overall aging population, Lithuania has the youngest television audience profile compared to any other country on the list. This is a reflection of a strong domination of national commercial television in the country with a focus on attracting younger and more economically active audiences that results in higher offer for children in order to attract entire family.

Model #2: "Socially significant": Estonia

The difference of interaction between audiences and television in Estonia compared to Lithuania comes from:

a) in both countries television is much more socially significant than in Lithuania – with 14% higher average viewing in Estonia.
b) economically TV is less important than in Lithuania - due to strong print media – index 37.
c) higher share of relationship between general audience and television is build in off prime time with less engaged viewing patterns. TV is a "warmer" medium there.
d) significantly higher audience fragmentation levels than in Lithuania.
e) television in Estonia has a similar overall orientation towards female audiences as in Lithuania, but with older audience profiles

To sum up television in this model is more important part of everyday life, but has less economic significance, is more fragmented and caters to more niche audiences, is rather old as general medium and has similar male vs. female balance as in Lithuania.

Model #3: "Diminished importance": Norway and Denmark.

Key characteristics: lower overall socio-economic significance, strong public broadcaster, engaging viewing.

Scandinavian television model is quite different from Lithuanian one. It is characterized by overall lower social and economic significance that television plays in the society (average viewing levels are 10-20% lower compared to Lithuania, and the share of advertising market taken by television is almost half of what it is in Lithuania). Scandinavian audience and television relationship can also be characterized as more engaging - the proportion of viewing generated in prime time is significantly higher than in Lithuania (by 15-20%). As a group of significantly better economically developed countries Scandinavian also have much stronger position of public broadcaster and weaker position of national commercial TV stations. When it comes to the alternative choices that viewers have and fragmented niche viewing, as is the case in Norway. Denmark is more outstanding in this respect with 30% higher audience fragmentation levels compared to Lithuania. From the demographic point of view overall Scandinavian television has closer relationship with older population compared to, but at the same time in all three countries it is more appealing to men (percentage of viewing generated by female audiences is 8-9% lower than in Lithuania).

To sum up, Scandinavian television compared to Lithuania – it is less important part of everyday life, it is "cooler"/more engaging medium on "warm" vs. "cool" scale, is better oriented and more appreciated by men, at the same time is has closer relation to older audiences.

The three models of relationship between audiences and television between the countries illustrate well the fact that despite globalization processes television remains to be first of all a national phenomenon. It has emerged in the context of a nation state and was highly regulated for most of its past. Television content is filtered through cultural habits and lifestyle patterns, so the closest similarities in the relationship of audiences to television are often between the countries that share similar backgrounds.

Lithuania is in a situation when the relationship is highly commercialized. When looking at future forecasts, in my mind it would be incorrect to assume that there is a clear hierarchy of models, e.g. to say that in the future we will be moving more towards Scandinavian model with lower overall importance and higher fragmentation. In my mind the set of relationships exists as parallel to each other instead of being perceived as different stages of "media evolution". All of these models will inevitably develop and change in the coming future and a certain degree of increasing similarity can be expected, but still I believe that rather high differences will remain and we will hardly be able to talk about a common European television culture because of the underlying cultural and national differences between the countries.

2.4 PATTERNS OF TELEVISION VIEWING AND AUDIENCE FRAGMENTATION

In order to better understand the potential development of relationship between audiences and television in the future, let's take a look at the television viewing and audience fragmentation trends over the past decade. I will start from looking at the overall television watching trends - how much and when an average person watches TV and how this tendency changes over time. In most general terms the importance of television can be illustrated by the time an average person spends watching TV each day. By looking at this trend I also want to empirically test the **hypothesis that emergence of "new media" threatens "traditional" medias. The rise and popularity of Internet is reducing the importance of television and can replace it in the near future.**

It is a known fact that Internet is a growing new media and it is one of the moving forces that is changing the relationship of audiences to traditional media. There are two potential ways of development:

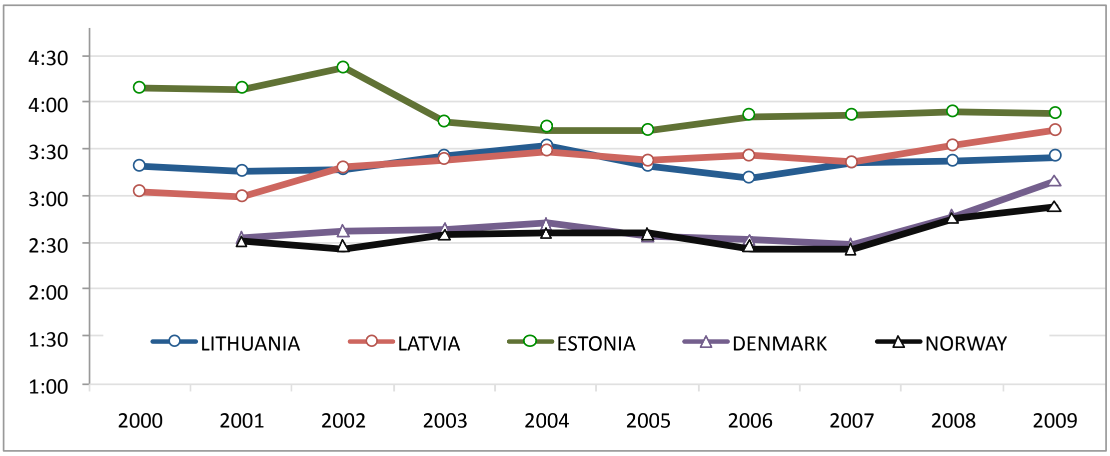
a) new media (internet) will be replacing the time that people used to allocate to their usual activities in the past;
b) new media (internet) will be supplementing the time that people were allocating to their usual activities in the past.

Chart 2.4.1 shows the trend of television viewing in the analyzed countries over the period of last 5-10 years (depending on available data).

This chart clearly shows that as a branch of media, relation of audiences to television was rather stable in all 5 countries. Despite the rise of Internet, television did not experience significant shifts of mass audiences away from this media – there were no dramatic drops in the average viewing times. I.e. increased interaction with other medias in recent years is complimenting but not replacing previous habits of watching television. If we compare this trend to the theoretical development model shown in chart 1.2 (page 15 "Global media consumption trend") we can empirically verify that indeed the tendency is that average person is increasingly exposed to media with new platforms predominantly acting as supplements to each other and increasing the number of sources and overall intensity of information and entertainment that reaches us and shapes our perception of the world.

Comparing the viewing patterns between the countries, the lowest viewing levels are in Scandinavian countries – with averages around 2.5 hours. In the Baltics this parameter is almost one hour higher – an average person spends closer to 3.5 hours daily watching television.

CHART 2.4.1
TOTAL TV - AVERAGE TIME VIEWED PER DAY
(measurement: average hours: minutes per day / target group: all 4+)



Region	Country	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	Average:
BALTICS	LITHUANIA	3:19	3:16	3:17	3:26	3:32	3:19	3:11	3:22	3:23	3:25	3:21
	LATVIA	3:03	2:59	3:18	3:23	3:28	3:23	3:26	3:22	3:32	3:42	3:22
	ESTONIA	4:09	4:09	4:22	3:47	3:44	3:42	3:51	3:52	3:54	3:53	3:56
SCANDI-NAVIA	DENMARK		2:33	2:37	2:38	2:42	2:34	2:32	2:29	2:47	3:10	2:40
	NORWAY		2:30	2:27	2:34	2:36	2:35	2:27	2:26	2:45	2:53	2:35

Source: TV meter surveys

Let's look deeper into the general viewer behavior – not just how much, but also when and who watches television in order to establish similarities and differences in the patterns that viewers relate to this media in analyzed countries.

Table 2.4.2 shows the seasonal changes of television viewing between the countries.

TABLE 2.4.2
SEASONALITY OF TELEVISION VIEWING
(average TV viewing per day 2004-2009 /target group: all 4+)

Average 2005-2009

Region	Country	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	FY
BALTICS	LITHUANIA	3:58	3:56	3:42	3:15	2:58	2:49	2:42	2:49	2:55	3:17	3:43	3:56	3:20
	LATVIA	4:00	4:01	3:48	3:26	3:12	3:01	2:56	3:00	3:07	3:28	3:50	3:59	3:29
	ESTONIA	4:20	4:24	4:12	3:49	3:35	3:20	3:10	3:22	3:32	3:53	4:07	4:22	3:50
SCANDINAVIA	DENMARK	3:06	2:59	2:50	2:35	2:29	2:22	2:16	2:25	2:34	2:48	2:55	3:07	2:42
	NORWAY	3:09	3:12	2:53	2:29	2:24	2:07	1:51	2:13	2:31	2:41	2:55	3:07	2:37
		EXPRESSED AS INDEX vs FULL YEAR AVERAGE												
Region	Country	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	FY
BALTICS	LITHUANIA	119	118	111	97	89	85	81	85	88	98	112	118	100
	LATVIA	115	115	109	99	92	87	84	86	90	100	110	114	100
	ESTONIA	113	115	110	99	93	87	82	88	92	101	107	114	100
SCANDINAVIA	DENMARK	114	110	105	96	92	88	84	89	95	104	108	115	100
	NORWAY	120	122	110	95	92	81	70	85	96	102	111	119	100

Source: TV Meter surveys

In order to see the pattern more clear and eliminate the difference coming from differences in total TV consumption I also expressed the pattern as monthly index compared to full year average in that country. The result is shown in the bottom part of the table using color-coding: green = index 95-105 vs. full year average; Red = index under 95 vs. full year average, Orange = index over 105 vs. full year average.

The color-coding shows that TV seasons are quite similar in all countries – high viewing persists through the autumn and winter months. Lowest viewing – during summer. In Scandinavia September has slightly higher viewing compared to full year averages than in other countries where bigger number of viewers returns to the screens but that happens a month later.

Looking at the distribution of total TV viewing during the day I look separately at averages for weekdays and weekends as the behavior is naturally different (table 2.4.3).

TABLE 2.4.3
AVERAGE TV VIEWING – INDIVIDUAL WEEKDAYS
(average 2004-2009, hours: minutes, target group: all 4+)

		Mon	Tue	Wed	Thur	Fri	Sat	Sun	Weekdays	Weekends	Week
BALTICS	LITHUANIA	3:14	3:10	3:09	3:10	3:17	3:27	3:50	3:12	3:39	3:20
	LATVIA	3:20	3:16	3:17	3:17	3:22	3:40	4:10	3:18	3:55	3:29
	ESTONIA	3:47	3:41	3:41	3:41	3:44	3:56	4:22	3:43	4:09	3:50
SCANDINAVIA	DENMARK	2:38	2:37	2:33	2:32	2:42	2:49	3:04	2:36	2:57	2:42
	NORWAY	2:28	2:25	2:24	2:23	2:40	2:56	3:06	2:28	3:01	2:37

EXPRESSED AS INDEX VS FULL WEEK AVERAGE

		Mon	Tue	Wed	Thur	Fri	Sat	Sun	Weekdays	Weekends	Week
BALTICS	LITHUANIA	97	95	95	95	99	104	115	96	109	100
	LATVIA	96	94	95	94	97	105	120	95	112	100
	ESTONIA	98	96	96	96	97	102	114	97	108	100
SCANDINAVIA	DENMARK	97	97	94	94	100	104	114	96	109	100
	NORWAY	94	92	91	91	102	112	118	94	115	100

Source: TV Meter surveys

Audiences spend more time interacting with television during the weekends with Sunday as dominant TV day in all countries. For better comparison between the countries the bottom part is presented as an index of individual day compared to average daily viewing for entire week. This shows that relative importance of television in Scandinavia is more equally spread across Friday through Sunday. Whilst in the rest of the countries Sunday is the key television day.

If we look at the distribution of audiences during a typical weekday and typical weekend we will see more differences between the countries. See charts 2.4.4 and 2.4.5 for average ratings pattern during the day.

On the other hand – if we compare Baltics to Scandinavia – we see very similar levels in prime time (18:00-23:00) and night time, but TV viewing is completely different during the daytime where viewing levels in Scandinavian countries are almost 2 times lower.

Similar conclusions are also true for the weekends – see chart 2.4.5.

Scandinavians – only slightly less TV viewing in prime time, ant the key difference comes during the daytime.

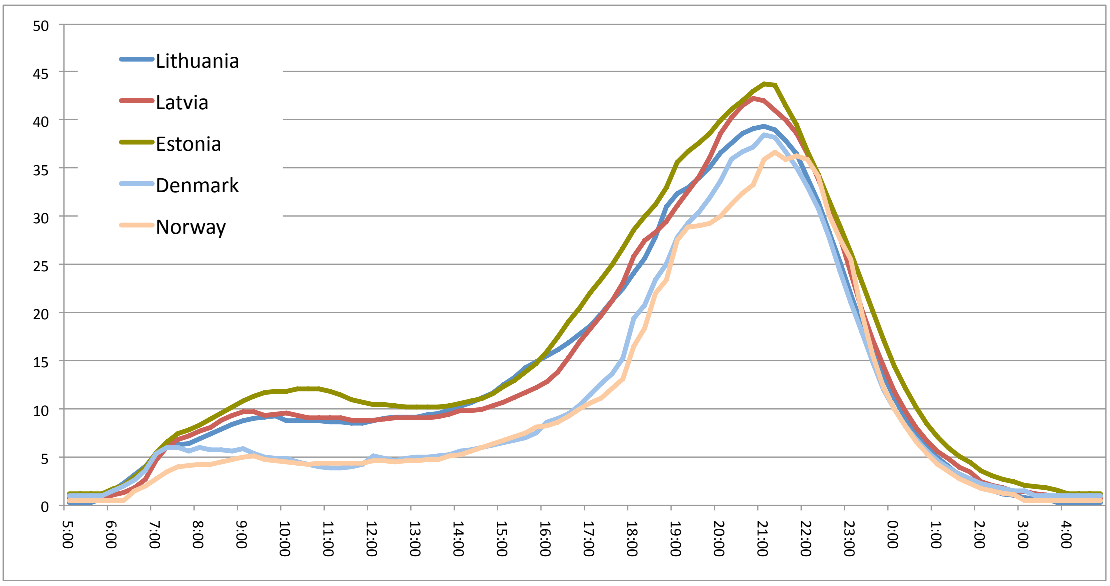
The summarized audience distribution by day-parts across the countries is presented in table 2.4.6. The key difference between the countries – in Scandinavia the television is much more prime time focused – on weekdays more than 50% of total viewing is generated during the prime time hours

(18:00-23:00). In the rest of the countries, though prime-time remains the leading day-part, more viewing is generated across all other day-parts compared to prime time.

CHART 2.4.4

AVERAGE TV CONSUMPTION PATTERN – WEEKDAYS

(Average rating; target group: all 4+, period: 2004-2009)

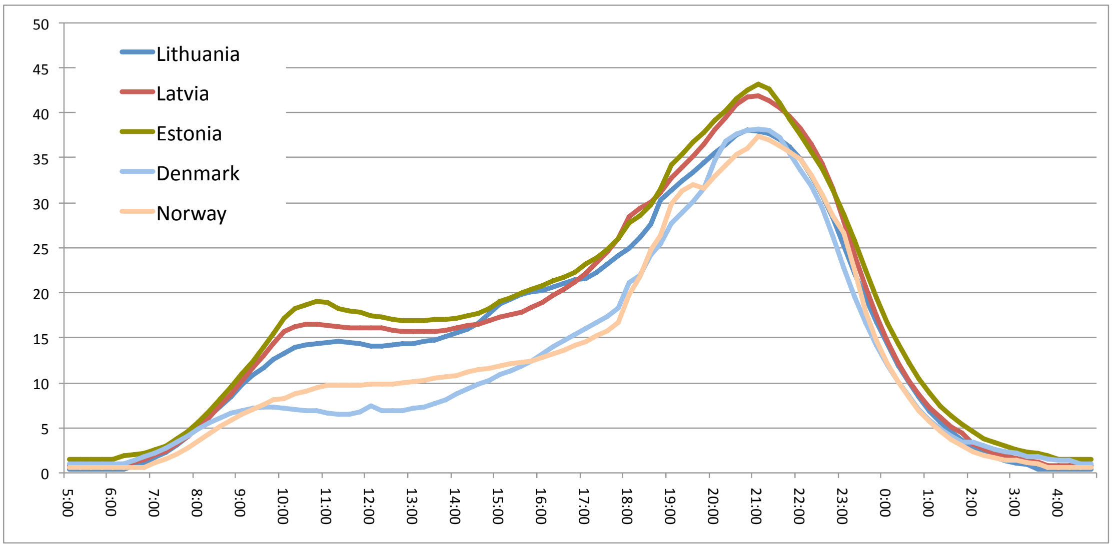


Source: TV Meter surveys

CHART 2.4.5

AVERAGE TV CONSUMPTION PATTERN – WEEKENDS

(Average rating; target group: all 4+, period: 2004-2009)



Source: TV Meter surveys

During the weekends viewing increases, but the increase mainly comes from additional viewing during daytime and prime access. This is also seen by different split between prime time and off prime-time viewing, where in all countries without exceptions aggregated off prime time viewing generates higher audiences than prime time alone.

TABLE 2.4.6
STRUCTURE OF TOTAL TV VIEWING BY DAYPARTS
(day-part structure in percent; average 2004-2009)

WEEKDAYS

		MT [05:00-10:00]	DT [10:00-15:00]	PA [15:00-18:00]	PT [18:00-23:00]	NT [23:00-02:00]	FD	PT	OFF PT
BALTICS	LITHUANIA	6.9	12.5	22.7	44.8	13.2	100	45	55
	LATVIA	7.0	12.2	20.5	46.0	14.3	100	46	54
	ESTONIA	7.3	12.8	21.8	43.0	15.0	100	43	57
SCANDINAVIA	DENMARK	6.9	8.3	16.8	52.2	15.8	100	52	48
	NORWAY	5.2	8.5	16.6	52.6	17.1	100	53	47

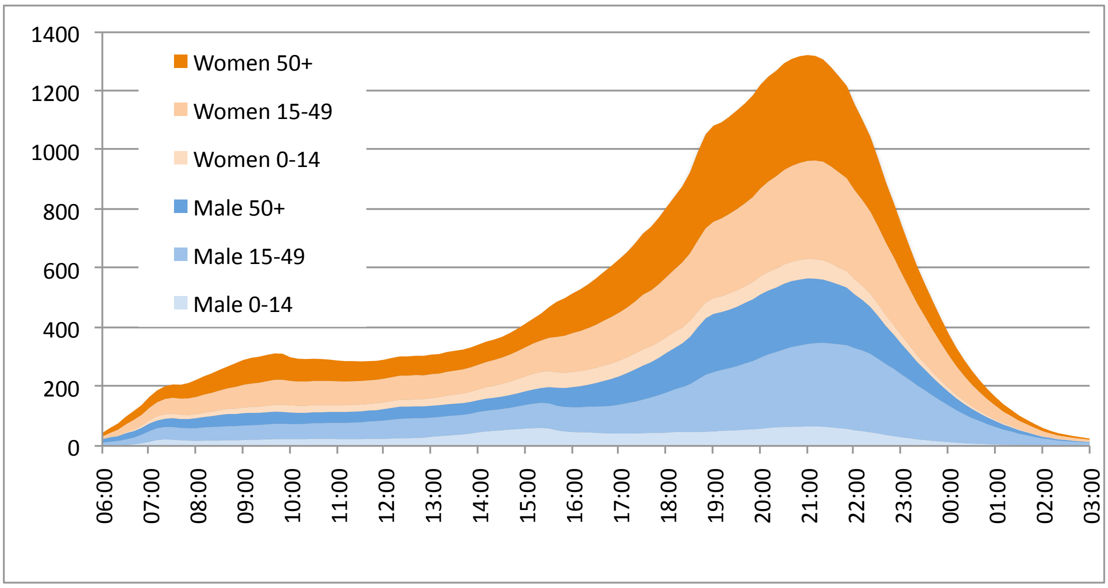
WEEKENDS

		MT [05:00-10:00]	DT [10:00-15:00]	PA [15:00-18:00]	PT [18:00-23:00]	NT [23:00-02:00]	FD	PT	OFF PT
BALTICS	LITHUANIA	5.1	17.2	24.5	38.7	14.5	100	39	61
	LATVIA	5.3	17.8	22.7	39.7	14.6	100	40	60
	ESTONIA	5.7	18.3	22.7	37.9	15.4	100	38	62
SCANDINAVIA	DENMARK	5.5	11.2	21.1	46.3	15.9	100	46	54
	NORWAY	4.4	14.4	19.7	45.1	16.3	100	45	55

Source: TV Meter surveys

The table 2.4.6 shows where and what percentages of total TV viewing are generated. However it does not reveal the differences in audience relation to television during the day. This is further explored in the charts 2.4.7 and 2.4.8 using Lithuania as an example. The aim is to illustrate the audience buildup including splits by gender and by basic age groups.

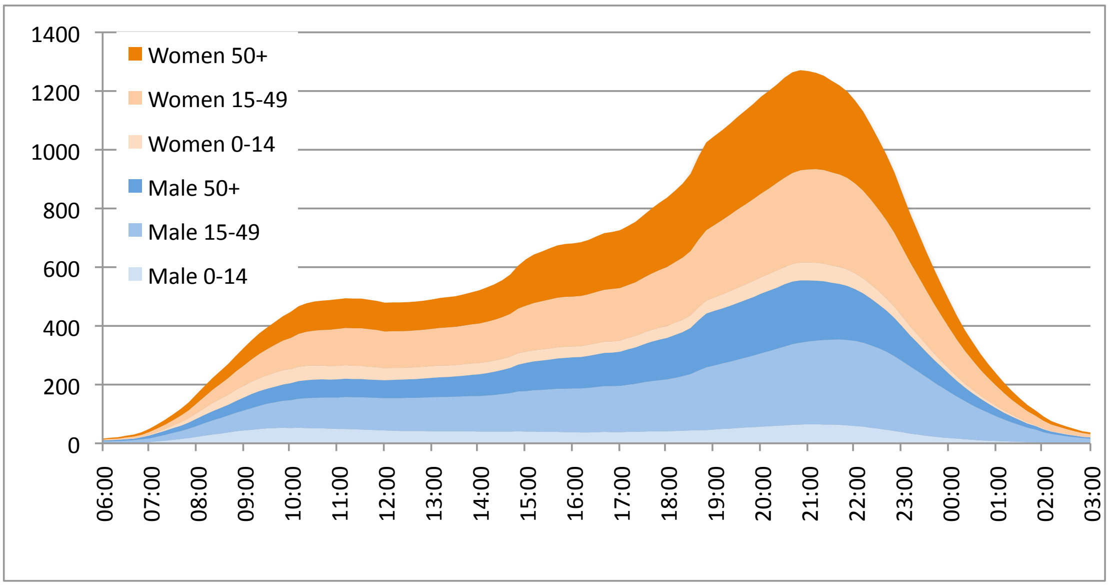
CHART 2.4.7
AGE AND GENDER STRUCTURE DURING THE DAY – WEEKDAYS
(Country: Lithuania, audience in '000, average 2004-2009)



Source: TV Meter surveys

What we see from these two charts is a general audience build up patterns across the day, that TV is overall more female dominated. This is especially true during the prime access hours on weekdays. To see the tendencies more clearly, the analysis should be taken further into defining the most "influential" social groups in relation to television.

CHART 2.4.8
AGE AND GENDER STRUCTURE DURING THE DAY – WEEKENDS
(Country: Lithuania, audience in '000, average 2004-2009)



At this point I look into dynamics of the 4 television sectors across the last decade in individual countries. For each country I look at the SOV development in two target groups - the broadest adult target group (All 4+) and in more narrow – economically active population (All 15-49). The dynamics show the distribution of total television viewing in particular year among 4 key segments of television channels:

Segment 1 – national commercial broadcasters;

Segment 2 – public broadcaster;

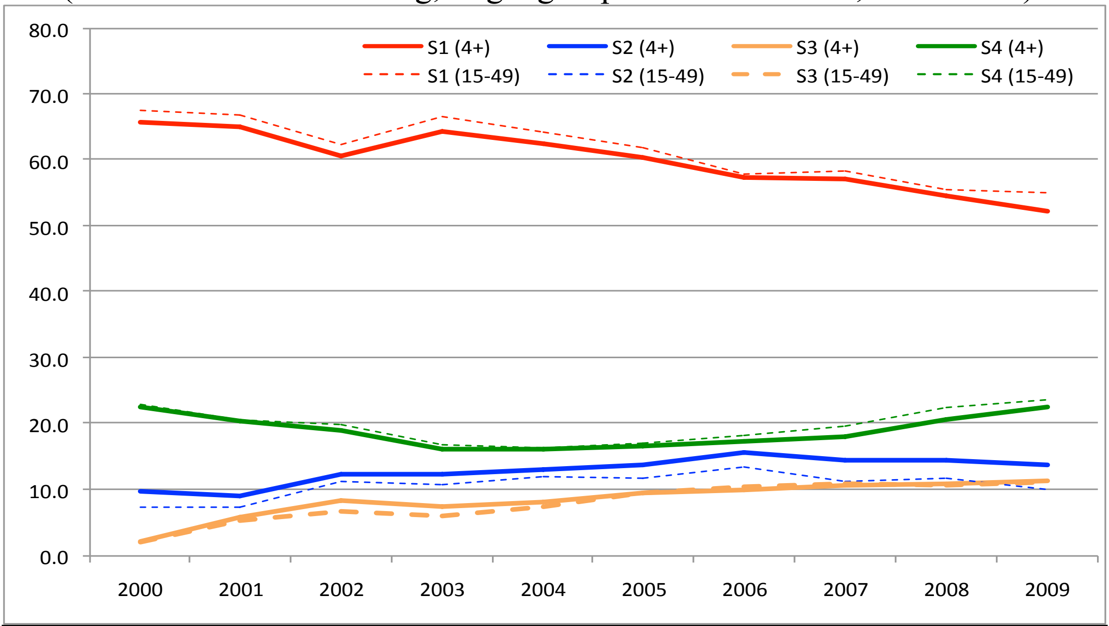
Segment 3 – regional and local niche channels;

Segment 4 – cable and satellite channels.

Results for individual countries are presented in the charts 2.4.9 -2.4.13

The key tendency in Lithuania is that viewer audiences are shifting from the group of primary commercial TV stations. If we measure the change between 2001 (I exclude 2000 as TV meter panel was just launched then) and 2009 – this is the category that lost total of 12.6 share points. This audience was re-split between public broadcaster, which improved its position since the beginning of decade and local niche and secondary channels (that include the secondary channels of the main commercial groups as well). The lowest switch over was to cable and satellite segment. Though this group fluctuated quite a bit during the decade and shows a general increase in viewing. That trend is in line with general tendency of increasing audience fragmentation and more choices available to the viewers every year.

CHART 2.4.9
LITHUANIA
SOV DYNAMICS IN CHANNEL SEGMENTS
OVER THE LAST 10 YEARS
(National share of viewing, target groups: all 4+ & 15-49, 2000-2009)



	LITHUANIA	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	Change '09 vs '01
TG: All 4+	S1 (4+)	65.8	64.9	60.6	64.2	62.5	60.3	57.1	56.9	54.4	52.3	-12.6
	S2 (4+)	9.6	9.1	12.2	12.3	13.1	13.7	15.7	14.4	14.4	13.7	4.6
	S3 (4+)	2.2	5.6	8.3	7.3	8.1	9.5	9.9	10.6	10.7	11.4	5.8
	S4 (4+)	22.4	20.4	18.9	16.2	16.3	16.5	17.3	18.1	20.5	22.6	2.2
TG: All 15-49	S1 (15-49)	67.6	66.8	62.2	66.6	64.2	61.8	57.9	58.3	55.4	55.1	-11.7
	S2 (15-49)	7.4	7.6	11.3	10.9	12.0	11.7	13.5	11.2	11.8	10.0	2.4
	S3 (15-49)	2.1	5.1	6.7	5.8	7.4	9.4	10.4	10.9	10.5	11.2	6.1
	S4 (15-49)	22.9	20.5	19.8	16.7	16.4	17.1	18.2	19.6	22.3	23.7	3.2
INDEX 15-49 vs 4+	Index S1	103	103	103	104	103	102	101	102	102	105	
	Index S2	77	84	93	89	92	85	86	78	82	73	
	Index S3	95	91	81	79	91	99	105	103	98	98	
	Index S4	102	100	105	103	101	104	105	108	109	105	

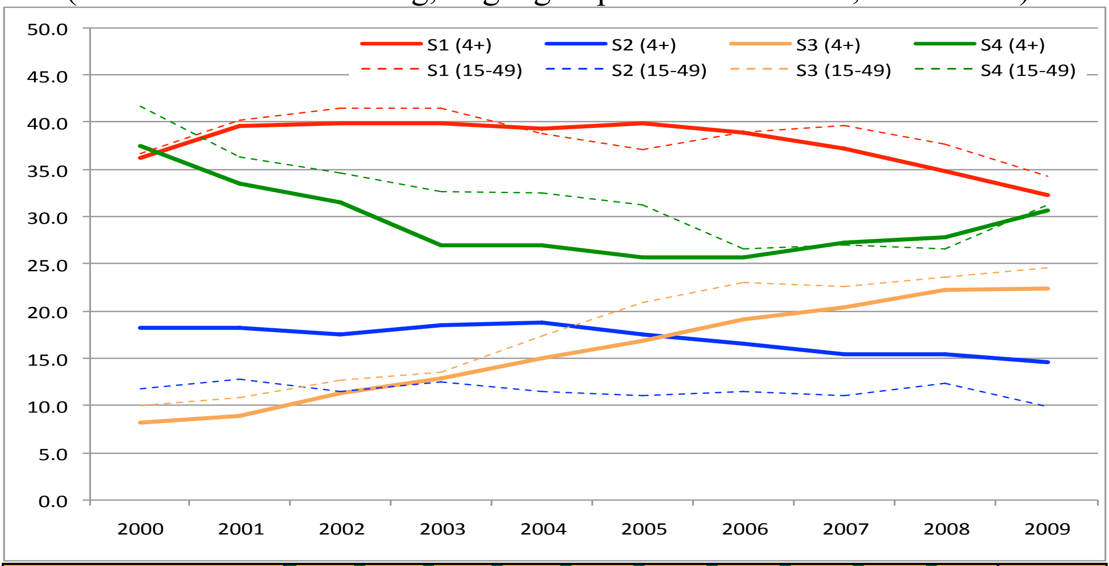
Source: TV meter surveys.

The comparison of 4+ and 15-54 target groups shows that commercial channels (segment 1) and cable and satellite (segment 4) are building a stronger relationship with economically active audiences (15-49), whilst public broadcaster is suffering big audience losses if measured in younger target group. The difference between commercial and cable and satellite channels is also in which side is more active in building this relationship between the channel and economically active audience. In case of commercial channels – this is first of all the initiative from TV stations to target more economically active viewers in order to be more attractive for advertisers. In case of cable and satellite segment – it is initiative of younger viewers to actively search for alternatives for the content that they receive via traditional TV stations.

Developments in Latvia (see table 2.4.10) are different from Lithuania. Latvia has significantly higher proportion of Russian population and much higher proportion of population is concentrated in cities (Riga), which are easily covered by cable television. On one hand that results in more choices available to an average viewer (because of the channel offer in cable as opposed to terrestrial broadcast). It also creates higher interest from the side of the viewers (especially Russian speaking population) to look for alternatives to available terrestrial broadcasts, which are naturally focused on the issues of nation state. This resulted in fast growth of popularity of Russian TV stations, which became more and more localized and are the reason of fast switch of audiences to segment 3. Combined group of commercial channels (segment 1) shows the same trend as in Lithuania – audiences gradually moving to other segments. This group lost 7.3 percent points between 2001 and 2009. The viewing of public broadcaster is declining and it shows much bigger proportional drop compared to Lithuania when measured in younger target group (average of 30% comparing to 20% in Lithuania). So all in all the key difference in Latvia compared to Lithuania is that there is a clear segment of localized niche and regional TV stations which saw a fast growth of viewer attention and that is mainly due to different demographic (urbanization and nationality parameters) than in Lithuania.

CHART 2.4.10
LATVIA
SOV DYNAMICS IN CHANNEL SEGMENTS
OVER THE LAST 10 YEARS

(national share of viewing, target groups: all 4+ & 15-49, 2000-2009)



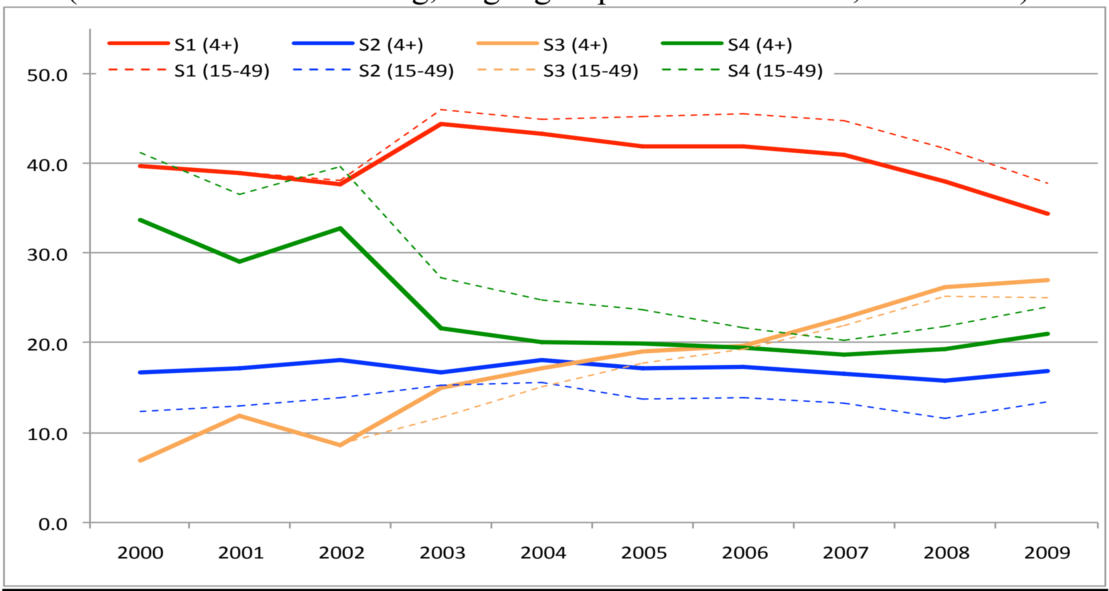
	LATVIA	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	Change '09 vs '01
TG: All 4+	S1 (4+)	36.1	39.6	39.8	39.9	39.3	39.8	38.8	37.1	34.7	32.3	-7.3
	S2 (4+)	18.2	18.1	17.4	18.5	18.8	17.5	16.4	15.3	15.3	14.6	-3.5
	S3 (4+)	8.2	8.9	11.3	12.9	15.0	16.8	19.1	20.4	22.2	22.4	13.5
	S4 (4+)	37.5	33.4	31.5	26.9	26.9	25.9	25.7	27.2	27.8	30.7	-2.7
TG: All 15-49	S1 (15-49)	36.6	40.2	41.5	41.5	38.8	37.1	38.9	39.6	37.6	34.3	-5.9
	S2 (15-49)	11.7	12.8	11.4	12.4	11.5	11.0	11.5	11.0	12.3	9.9	-2.9
	S3 (15-49)	10.0	10.8	12.6	13.5	17.3	20.8	23.0	22.5	23.5	24.6	13.8
	S4 (15-49)	41.7	36.2	34.5	32.6	32.4	31.1	26.6	26.9	26.6	31.2	-5.0
	Index S1	101	102	104	104	99	93	100	107	108	106	
	Index S2	64	71	66	67	61	63	70	72	80	68	
	Index S3	122	121	112	105	115	124	120	110	106	110	
	Index S4	111	108	110	121	120	120	104	98.9	95.7	102	

Source: TV Meter surveys.

Moving to the next Baltic country – Estonia – see chart 2.4.11. Estonia shows a clear and steady increasing audience fragmentation illustrated by the switch of viewer attention to the segment 3 (local niche and regional stations) during the last decade. This is caused by similar factors as in Latvia – higher portion of urban population – clear concentration in Tallinn with easy possibilities to give viewers more choice via cable. Also closer relation of Estonians to Finland and Scandinavian countries as well as the need of Russian audiences to get information and entertainment from Russia. Traditional picture in the group of main national commercial stations – the process of audience erosion, but here the segment is much more focused on retaining positions in 15-49 target group (index between two targets is higher than in Lithuania or Latvia). Public broadcaster's position is rather stable, but older audience oriented (just as in Lithuania and Latvia).

CHART 2.4.11
ESTONIA
SOV DYNAMICS IN CHANNEL SEGMENTS
OVER THE LAST 10 YEARS

(national share of viewing, target groups: all 4+ & 15-49, 2000-2009)



	ESTONIA	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	Change '09 vs '01
TG: All 4+	S1 (4+)	39.6	38.9	37.7	44.4	43.2	41.9	41.9	40.9	38.0	34.4	-4.5
	S2 (4+)	16.6	17.1	18.1	16.7	18.0	17.1	17.3	16.4	15.8	16.8	-0.3
	S3 (4+)	6.9	11.8	8.6	15.0	17.1	19.0	19.6	22.8	26.1	27.0	15.2
	S4 (4+)	33.7	28.9	32.7	21.5	19.9	19.8	19.3	18.7	19.1	20.8	-8.1
TG: All 15-49	S1 (15-49)	39.7	38.9	38.0	46.0	44.8	45.2	45.4	44.7	41.5	37.8	-1.1
	S2 (15-49)	12.2	12.9	13.8	15.2	15.6	13.6	13.8	13.2	11.6	13.3	0.4
	S3 (15-49)	6.9	11.8	8.6	11.6	15.0	17.7	19.2	21.8	25.2	25.0	13.2
	S4 (15-49)	41.2	36.4	39.6	27.2	24.6	23.5	21.6	20.3	21.7	23.9	-12.5
	Index S1	100	100	101	104	104	108	108	109	109	110	
	Index S2	73.5	75.4	76.2	91	86.7	79.5	79.8	80.5	73.4	79.2	
	Index S3	100	100	100	77.3	87.7	93.2	98	95.6	96.6	92.6	
	Index S4	122	126	121	127	124	119	112	109	114	115	

Source: TV Meter surveys.

The segment of cable and satellite channels is bigger than in Lithuania and has strong position in 15-49 target group, which shows that younger population in Estonia is more focused on commercial channels, and cable/satellite group than smaller local TV stations or public broadcaster. Similar trends are taking place in Scandinavian countries as well.

2.5. INFLUENCE GROUPS AND SEGMENTATION OF KEY TV CATEGORIES

Looking into comparison on how big a certain demographic group is in each country (in percent) and what proportion of total television viewing it generates (in percent), we can establish the most important – “influence” groups in each country. By calculating an index between two values we can get the “weight of influence” of a certain group on television viewing. I.e. clearly identify what target groups are both most numerous and most active television viewers. It is also interesting to make this analysis in cross-country perspective. I am using the key demographic groups – age, sex, urbanization, social class and reception types. The results are presented in the tables 2.5.1 and 2.5.2

TABLE 2.5.1
IDENTIFYING INFLUENCE GROUPS - BALTICS
TV AUDIENCE STRUCTURE VS COUNTRY DEMOGRAPHICS
(% of total TV ratings vs. % of demographic split; period 2005-2009)

	LITHUANIA			LATVIA			ESTONIA		
	% of TV ratings	% of population	Influence index	% of TV ratings	% of population	Influence index	% of TV ratings	% of population	Influence index
Age Group=4-14	12%	15%	77	9%	11%	80	9%	12%	74
Age Group=15-34	24%	30%	79	22%	31%	72	22%	31%	73
Age Group=35-54	30%	29%	**104**	31%	29%	**107**	30%	29%	**105**
Age Group=55-99	35%	26%	**134**	38%	29%	**130**	39%	29%	**135**
	100%	100%		100%	100%		100%	100%	
Females 4+	57%	54%	**107**	57%	54%	**106**	58%	54%	**107**
Males 4+	43%	47%	92	43%	46%	93	42%	46%	92
	100%	100%		100%	100%		100%	100%	
Urban	66%	64%	**104**	72%	71%	**101**	70%	69%	**101**
Rural	34%	36%	94	28%	29%	98	30%	31%	98
	100%	100%		100%	100%		100%	100%	
TV Reception=Analogue terrestial	50%	52%	95				35%	37%	95
TV Reception=Multichannel	50%	48%	**106**				65%	63%	**103**
	100%	100%					100%	100%	
Social Class=A-B	24%	24%	97	30%	33%	90			
Social Class=C1	19%	21%	90	11%	11%	98			
Social Class=C2	47%	45%	**104**	36%	35%	**101**			
Social Class=D-E	10%	9%	**109**	24%	20%	**116**			
	100%	100%		100%	100%				

Source: TV Meter surveys

Based on the results in table 2.5.1 we can see that in all 3 Baltic countries the dominant age group that has strongest relation to television are people 55 years and older. Though demographically this target groups varies between 26% and 29% of population in the country, this target groups is responsible for 35-39% of total television viewing. On the other hand children and old adults come up as lightest television viewers. Looking at other demographics we also see that women have a stronger relationship with television than men. It is also interesting to see that television in the Baltic countries is heavier consumed in urban areas and in multi channel households. At the same time it is more important part of daily lives among lower social classes compared to the higher ones. Overall the intensity of television viewing compared to demographic structure within each country is very similar between all 3 Baltic countries. Natural question is if such older and more female skewed pattern of TV consumption is the unique case in the Baltic countries or if it is similar if we look into other regions. Table 2.5.2 shows the three Scandinavian countries.

TABLE 2.5.2
IDENTIFYING INFLUENCE GROUPS - SCANDINAVIA
TV AUDIENCE STRUCTURE VS COUNTRY DEMOGRAPHICS
(% of total TV ratings vs. % of demographic split; period 2005-2009)

	NORWAY			DENMARK		
	% of TV ratings	% of population	Influence index	% of TV ratings	% of population	Influence index
Age Group=4-14	10%	15%	63	9%	15%	60
Age Group=15-34	25%	28%	90	25%	27%	92
Age Group=35-54	30%	30%	99	29%	30%	97
Age Group=55-99	36%	27%	**133**	38%	29%	**131**
	100%	100%		100%	100%	
Females 4+	52%	50%	**104**	53%	51%	**104**
Males 4+	48%	50%	96	47%	50%	96
	100%	100%		100%	100%	
Urban	43%	44%	99	69%	68%	**102**
Rural	57%	56%	**101**	31%	32%	96
	100%	100%		100%	100%	
TV Reception=Analogue terrestial						
TV Reception=Multichannel						

Source: TV Meter surveys

The situation in Scandinavian countries is quite similar – with the age group of 55+ as the dominant age category that has closest relationship with television. The difference is that in children target group television has weaker position than in the Baltic countries (index between demographic split and percentage of ratings generated is 60-63, while in the Baltic this is in the range of 74-80). However here the relationship with television is stronger in the young adult target groups – 15-34 (Scandinavia index 79-90, whilst in the Baltics 72-79).

Just as in the Baltic countries, Scandinavian television is more female skewed, but is slightly more equally balanced between both males and females. In the Baltics females generate 57-58% of total television viewing, whilst in Scandinavia this percentage is 52-53%. This can be the impact of both a different demographic split between men and women between Baltics and Scandinavia, and overall offer on television for male target groups.

On one hand it is possible to make a straightforward assumption that programming for housewives and pensioners is a key for successful television, this should be the "bull's eye" target group in order to get maximum popularity and build closest relationship with broad population.

However the fact that these groups have biggest influence on total TV viewing does not mean that all segments of television are relating to these audiences in the same way and vice versa – that different types of TV stations are equally acceptable to all the viewers.

If we take the same demographic splits and calculate affinity indexes within 4 key segments of television stations – we will see the differences of how audiences and these segments of television segments interact.

TABLE 2.5.3
LITHUANIA - AFFINITY OF TELEVISION SEGMENTS
(affinity index; period 2005-2009)

TARGET GROUP	AVERAGE RATING					AFFINITY INDEX				
		SEGMENTS					SEGMENTS			
	Total TV	1_Commercial	2_Public	3_Local niche	4_Cable/satelite	Total TV	1_Commercial	2_Public	3_Local niche	4_Cable/satelite
All 4+	13.9	7.8	2.0	3.3	2.7	100	100	100	100	100
Age Group=4-14	10.6	7.3	1.0	1.7	1.6	76	94	50	52	59
Age Group=15-34	11.0	6.5	1.1	2.2	2.2	79	83	55	67	81
Age Group=35-54	14.4	7.9	2.0	3.4	3.0	104	101	100	103	111
Age Group=55-99	18.7	9.5	3.6	5.5	3.4	135	122	180	167	126
Females 4+	14.9	8.6	2.1	3.6	2.5	107	110	105	109	93
Females 15-54	13.4	7.9	1.6	2.9	2.4	96	101	80	88	89
Females 55+	19.5	10.2	3.7	5.8	3.4	140	131	185	176	126
Males 4+	12.8	6.9	1.8	3.0	2.8	92	88	90	91	104
Males 15-54	11.9	6.4	1.5	2.6	2.8	86	82	75	79	104
Males 55+	17.3	8.5	3.5	5.1	3.5	124	109	175	155	130
Urban	14.4	7.1	2.0	3.8	3.3	104	91	100	115	122
Rural	13.0	9.0	1.9	2.4	1.5	94	115	95	73	56
TV Reception=Analogue terrestial	13.2	9.5	2.2	2.7	0.9	95	122	110	82	33
TV Reception=Multichannel	14.7	6.0	1.7	4.0	4.6	106	77	85	121	170
Social Class=A-B	13.4	7.2	2.2	3.6	2.5	96	92	110	109	93
Social Class=C1	12.5	6.2	1.8	3.4	2.8	90	79	90	103	104
Social Class=C2	14.5	8.6	1.9	3.1	2.7	104	110	95	94	100
Social Class=D-E	15.2	9.3	2.5	3.6	2.2	109	119	125	109	81

Source: TV Meter surveys

The analysis of affinity indexes shows the differences in which a relationship between different audiences and different TV segments is built.

General trends:

1. **Public broadcasters** – relate closest with older, more female and in case of the Baltic countries – terrestrial broadcasters.
2. **Commercial broadcasters** – focus on 15-49 target groups with the main channels. The need dictated by necessity to attract advertising revenue and serving as a communication platform between advertisers, looking for economically active populations at lowest costs, and viewers – looking for a combination of information and entertainment.
3. **Regional and secondary channels** – similar audiences as public broadcasters.

4. **Cable and satellite** broadcasters – serving the needs of niche audiences – men.

TABLE 2.5.4
LITHUANIA – SOV and AFFINITY INDEXES OF KEY CHANNELS
(SOV& affinity index; period 2005-2009)

TARGET GROUP	TV3 lt	LNK	BTV	LTV lt	PBK	TV6
	SHARE OF VIEWING					
All 4+	25.2	22.3	8.6	13.5	5.3	1.9
Age Group=15-34	30.6	21.5	7.0	9.4	4.1	2.9
Age Group=35-54	23.3	22.2	9.2	13.2	5.5	1.9
Age Group=55-99	19.8	22.4	8.8	18.1	7.4	1.1
	AFFINITY INDEX					
A4+	100	100	100	100	100	100
Age Group=4-14	109	81	83	47	14	67
Age Group=15-34	97	77	67	53	57	100
Age Group=35-54	97	103	108	100	114	100
Age Group=55-99	106	135	142	179	200	67
Females 4+	111	113	100	105	129	100
Females 15-54	109	100	92	79	100	100
Females 55+	114	145	142	179	229	67
Males 4+	89	87	92	89	86	100
Males 15-54	83	81	83	74	71	100
Males 55+	91	119	133	174	143	67
Urban	89	94	100	100	157	100
Rural	117	113	108	95	29	67
Social Class=A-B	89	94	100	111	114	100
Social Class=C1	77	84	75	89	157	67
Social Class=C2	114	106	108	89	86	100
Social Class=D-E	117	123	125	121	86	67
TV Reception=Analogue terrestial	123	123	117	111	0	67
TV Reception=Multichannel	77	77	75	84	229	100

Source: TV Meter surveys

2.6. CONTENT STRUCTURE

TV& public sphere - News programs. Comparison of individual Baltic countries.

News and current affair programs are the two areas where television has the most direct impact on our perception of the world around us. These types of programs are actively defining and visualizing event using a selection of narrative and supporting visual materials (Boyd Barret, 1998).

I am not looking into the actual content of the news, which should be an area for a different survey, but instead into the position, popularity, audience profiles and relation of different news programs.

Table 2.6.1 shows the summarized performance of the news programs in Lithuania for 2009.

TABLE 2.6.1
NEWS PROGRAMS – LITHUANIA – 2009

CHANNEL	TITLE OF NEWS PROGRAM	Typical start time	# of programme in '09	AVERAGE CHANNEL SOV '09 All 4+	AVERAGE CHANNEL SOV '09 All 15-49	NEWS PROGRAM PERFORMANCE All 4+ TRP	All 4+ Share	All 15-49 TRP	All 15-49 Share	NEWS PROGRAM INDEXES Affinity 15-49 vs 4+	SOV index vs channel average All 4+	SOV index vs channel average All 15-49
LTV	News at 16:00	16:10	112	12.8	9.2	2.7	13.0	1.6	8.7	**59**	102	95
	Today	19:00	252	12.8	9.2	4.7	16.8	2.5	11.7	**53**	131	127
	Panorama	**20:30**	**365**	**12.8**	**9.2**	**7.3**	**18.7**	**4.0**	**12.5**	**55**	146	136
	Evening news	23:15	197	12.8	9.2	2.0	9.8	1.5	6.8	**75**	77	74
LNK	**18:45**	**18:45**	**365**	**20.7**	**20.0**	**9.1**	**28.8**	**6.1**	**25.0**	**67**	**139**	**125**
	22:00	22:00	198	20.7	20.0	9.0	28.3	7.0	23.3	**78**	137	117
TV3	**TV3 news**	**18:45**	**364**	**23.5**	**27.5**	**11.2**	**35.1**	**9.2**	**37.8**	**82**	**149**	**137**
	TV3 evening news	22:00	196	23.5	27.5	8.5	23.0	9.8	30.0	**115**	98	109
BTV	**News at 20:00**	**20:20**	**365**	**8.1**	**7.5**	**3.8**	**10.3**	**2.4**	**8.2**	**63**	**127**	**109**
	News at 23:10	23:10-23:50	201	8.1	7.5	1.3	8.0	1.4	7.4	**108**	99	99
Special editions	LTV News. Special		9	12.8	9.2	2.8	17.6	1.7	12.5	**61**	138	136
	TV3 news. Special		11	23.5	27.5	6.3	24.1	6.4	30.0	**102**	103	109
	LNK news. Special		4	20.7	20.0	3.8	24.4	2.4	20.6	**63**	118	103
	BTV News. Special		4	8.1	7.5	2.5	11.4	2.2	12.4	**88**	141	165

Source: TV Meter surveys

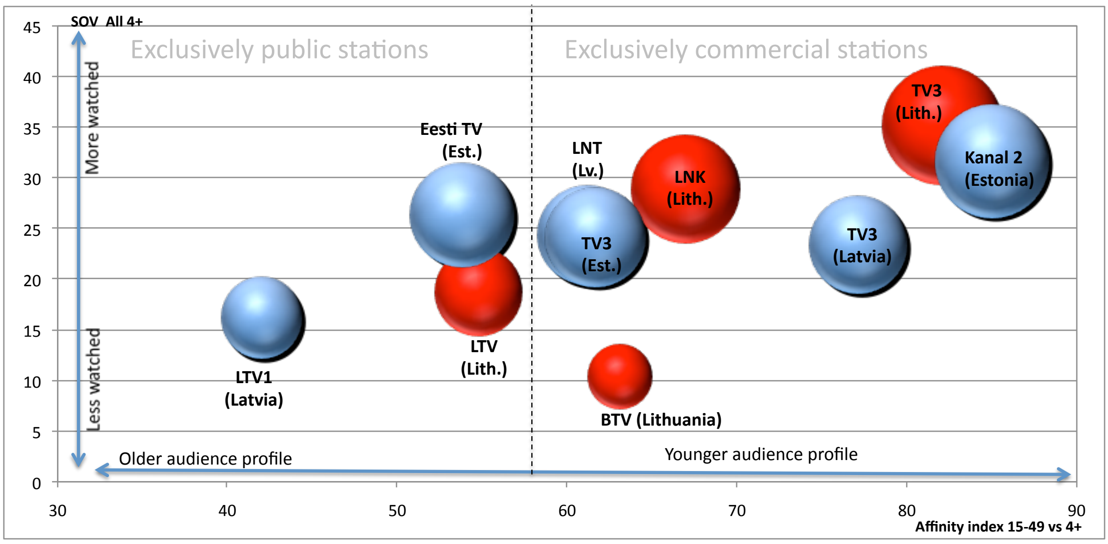
The main news on each channel is highlighted. What we see is that public broadcaster is only the 3-rd out of 4 according to the average audience size that news programs are attracting. I.e. commercial channels in Lithuania are also serving the role of the key information source. In order to see the distances more clearly we can take the most watched news (TV3 news at 18:45) in the country and make their average rating (target group: all 4+) as a 100% then measure the distance of popularity of the news on other channels as an index. We find LNK on index 81, public broadcaster LTV – at index 65 and third commercial broadcaster BTV at index 34.

If we look at the audience ratio between economically active adults (affinity index of target group 15-49 compared to 4+) and general population, we see that almost all news programs have index lower than 100. This means than news programs are almost in all cases attracting older audiences as their key viewers. The only exceptions were late night news on TV3 and BTV, which had higher ratings in 15-49 target groups compared to 4+.

When comparing the average share of viewing of the news broadcast to the average full day share of viewing of each TV station (last two columns on the right in table 2.6.1), we see that on all TV stations the main news are attracting bigger volume of viewers compared to the overall position of the TV station. This conclusion is also true for both all 4+ and all 15-49-target groups. In terms of volume – news are attracting between 30 to 50% more viewers than in average on the channel. On one hand this means that viewers are treating news broadcasts differently from the rest of the programs and are specifically tuning in to get daily portion of information. On the other hand this also means that news broadcasts are powerful way for TV stations to attract viewers and use news broadcasts as a core elements for building the rest of the schedules around them – grab viewer attention with the news, and convince them to stay afterwards for entertainment. Especially considering the fact that most popular news in Lithuania are carried on commercial stations, advertising inside of the news is restricted and commercial stations have to find the other ways to make profit from broadcasting the news on their air. This also shows the important role of the news in the eyes of the viewers and expectations for full format TV stations to perform the role of information supplier.

If we put television news into international perspective the situation is quite similar. Table 2.6.2 shows the popularity of the news and their orientation towards younger or older audience in the countries of Baltic region. This reveals a very similar pattern in all countries – we can draw a line on the affinity scale at the value of 58 – to the right from that line we will find the news broadcasts of exclusively commercial TV stations. While to the left (older audience profile of the news programs) we will find mostly public broadcasters. This division shows that even in news programs commercial broadcasters are focused on talking to younger and more economically active audiences as well as keeping focus on higher popularity of the programs. This way they attract the core of mainstream audience, gaining quality and size, at the same time public broadcasters are left talking to older viewers and start lacking size/popularity in the broad population compared to commercial channels. This comparison shows the general trend in all analyzed countries in the region to get the main portion of information via commercial broadcasters.

TABLE & CHART 2.6.2
MAIN NEWS PROGRAMS –2009



Source: TV Meter projects

	AVERAGE CHANNEL SOV '09		NEWS PROGRAM PERFORMANCE				NEWS PROGRAM INDEXES		
			All 4+		All 15-49		Affinity 15-49 vs 4+	SOV index vs channel average	
	All 4+	All 15-49	TRP	Share	TRP	Share		All 4+	All 15-49
LITHUANIA									
TV3 news	23.5	27.5	11.2	35.1	9.2	37.8	82	149	137
LNK. 18:45	20.7	20.0	9.1	28.8	6.1	25.0	67	139	125
LTV. Panorama	12.8	9.2	7.3	18.7	4.0	12.5	55	146	136
BTV News at 20:00	8.1	7.5	3.8	10.3	2.4	8.2	63	127	109
LATVIA									
LNT. LNT ziòas	16.8	16.1	9.8	24.3	6.0	20.3	61	145	126
TV3. TV3 ziòas	15.4	18.1	9.2	23.3	7.1	24.7	77	151	136
LTV1. Panorâma. Ziòas	10.1	5.5	6.9	16.1	2.9	9.0	42	159	164
ESTONIA									
Kanal 2. Reporter	19.6	20.7	12.7	31.6	11	35.9	85	161	173
Eesti TV. Aktuaalne kaamera	15.7	12.2	11.7	26.3	6.3	17.3	54	168	142
TV3. Seitsmesed uudised	14.8	17	9.4	24.1	5.8	20.1	62	163	118

One more thing seen in the table is that #1 TV station in each country is also the source of #1 (most watched) news. Leader for entertainment also serves as leader for information.

Television – "Secret exposing machine".
The case of Simpsons, Sex and the City, Brokeback Mountain.

As it was mentioned in theoretical part of this book, Joshua Meyrowitz – professor of communications at the University of New Hampshire, claims that television is responsible for a significant cultural shift towards new and egalitarian social interactions. He calls television a "secret exposing machine" (Meyrowitz, 1995) which is responsible for breaking barriers in 3 key areas:

1. Between children and adults;
2. Between men and women;
3. Humanizing and demystifying the powerful.

Similar directions are also indicated by Arvydas Matulionis (Matulionis, 2002) when indicating the three core directions of television studies – impact on child socialization, political life and levels of crime. Rosita Uziene (Uziene, 2009) also emphasizes the exposure of a child with average television watching to crime and violence. She also states that active television viewers find the world to be more dangerous and having more violence than the passive ones.

I will not analyze the effect of humanizing and demystifying the powerful, since in my mind it is more related to content analysis of news, current affair and tabloid programs in each country and should be combined with additional surveys of popularity and perception of politicians and other influential figures in the society.

The first two points raised by Meyrowitz, however, are related more towards the general content of television and can be further explored as case examples using selected programs. I am selecting three international products:

1. The Simpsons – cult animation series, which in the form of animation introduce kids to the issues of adult life.
2. Cult series “Sex and the city” – as a product that creates possibility for men to see life from more female perspective.
3. Famous movie “Brokeback Mountain” which is targeted at showing straight audiences the life from gay perspective and start reducing segregation based on sexual orientation. In my mind this is the extension of point 2 in Meyrowitz’s list.

Let’s start from point 1 – television and children.

I use Lithuania as an example and look into the share of viewing distribution among the TV stations in 2009. Results are shown in table 2.6.4. The table shows distribution of viewing between kids and teenagers among TV stations and compares it to the distribution of the viewing among general audience (all 4+). The index indicates which channels are heavier viewed by children or teenagers compared to general population. TV3 and TV1 have highest appeal for children.

TABLE 2.6.4
LITHUANIA - SOV CHILDREN & TEENAGERS - 2009
(2009, average share)

	SOV in TARGET GROUPS			SOV INDEX VS 4+	
	Kids 4-10	Teens 11-19	All 4+	Kids 4-10	Teens 11-19
TV3	35.1	37.4	23.5	149	159
LNK	16.6	20.8	20.7	80	100
LTV	5.9	6.7	12.8	46	52
BTV	5.4	6.7	8.1	67	83
TV1	2.8	3.1	2	140	155
TV6	1.9	4.2	2.2	86	191
PBK	1.0	1.8	5.3	19	34
Lietuvos rytas TV	0.9	1.4	2	45	70
LTV2	0.4	0.5	0.9	44	56
MTV Europe	0.2	2.0	0.3	67	667
Others	22.9	14.0	20.1	114	70
Video	7.0	1.5	2.1	333	71

Source: TV Meter surveys.

Children also spend more time on "other" channels, a category, which includes specialized cartoon channels. If we look at teenager group – then MTV jumps up in popularity (though still remaining small in overall viewing within the target group) and the list of channels more appealing to teenagers compared to general population broadens to include LNK and TV6 in addition to TV3 and TV1 as in children target group. All other TV stations on the list have weaker relationship with children or teenagers compared to general audience.

Let's look at individual programs across all TV stations best watched by kids in 2009. Table 2.6.5 shows top 30 individual programs among all TV stations. Family movie slots dominate the table, with animated features filling the top positions on the lists. The TRP column shows what was the average rating among all children, while share column shows what percentage of children from the ones watching television during the time of the broadcast each title attracted. Affinity index shows that these features in addition to being top rating programs are also very strongly skewed towards children compared to general audience – e.g. Garfield (number 1 on the list) had more than 3 times higher average rating among children than in broad population. In addition to traditional children titles some broader movies – like Taxi 2, Transformers and Night at the museum are also on the list showing that prime time is co-viewing together with other family members.

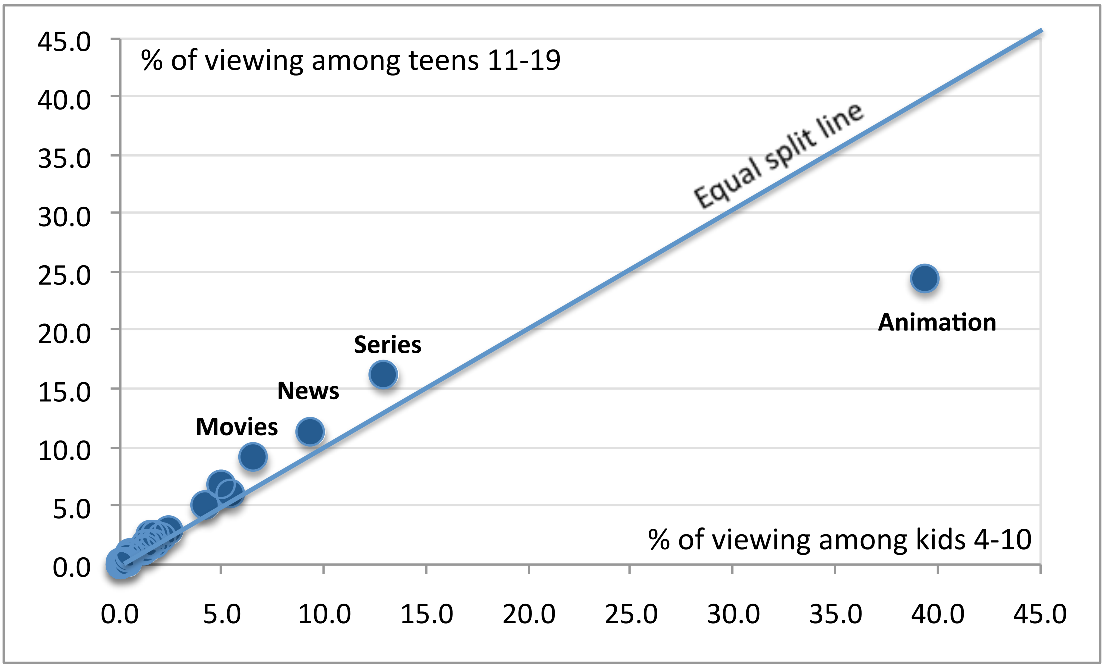
TABLE 2.6.5
LITHUANIA TOP 30 INDIVIDUAL PROGRAMS IN 2009 AMONG KIDS 4-10
(across all TV stations, average rating, share and affinity index vs. 4+)

				Kids 4-10		
Nr.	Channel	TITLE	TYPE	TRP	SHARE	Affinity vs 4+
1	TV3 lt	Big Friday Movie/ Garfield	MOVIE	42.8	86.5	312
2	TV3 lt	Big Friday Movie/ Shrek 2	ANIMATION	40.2	90.0	248
3	TV3 lt	Big Friday Movie/ Garfield 2	MOVIE	37.4	82.6	224
4	TV3 lt	Big Friday Movie/ Home Alone	MOVIE	36.4	76.2	230
5	TV3 lt	Big Friday Movie/ Shrek	ANIMATION	28.7	84.4	209
6	TV3 lt	Big Friday Movie/ Charlotte's Web	MOVIE	28.0	75.7	326
7	TV3 lt	Big Friday Movie/ Stuart Little 2	MOVIE	27.8	68.8	248
8	TV3 lt	Big Friday Movie/ Night at the museum	MOVIE	27.4	75.9	199
9	TV3 lt	Big Friday Movie/ Home alone 2	MOVIE	26.5	74.2	170
10	TV3 lt	Big Friday Movie/ Big Momma's House 2	MOVIE	26.4	65.8	208
11	TV3 lt	Big Friday Movie/ Ice age	ANIMATION	24.7	64.9	225
12	TV3 lt	Big Friday Movie/ Problem child 3	MOVIE	23.9	60.2	213
13	TV3 lt	Big Friday Movie/ Cheaper by the dozen 2	MOVIE	23.4	80.3	282
14	TV3 lt	Big Friday Movie/ Big Momma's House	MOVIE	22.3	70.3	201
15	TV3 lt	Ever After: A Cinderella Story	MOVIE	21.9	60.8	139
16	TV3 lt	Big Friday Movie/ Home alone 3	MOVIE	21.3	64.5	134
17	TV3 lt	Big Friday Movie/ Ice Age 2	ANIMATION	20.9	52.8	167
18	TV3 lt	Big Friday Movie/ Transformers	MOVIE	20.8	67.9	163
19	LNK	Finding nemo	ANIMATION	19.3	46.5	264
20	TV3 lt	Big Friday Movie / Johnny English	MOVIE	18.6	50.8	154
21	TV3 lt	Big Friday Movie/ Stuart Little	MOVIE	18.4	54.0	190
22	LNK	Hercules	ANIMATION	18.2	42.1	228
23	LNK	Taxi 2	MOVIE	18.1	51.4	195
24	TV3 lt	Scary Movie 3	MOVIE	17.8	66.0	185
25	TV3 lt	Scary Movie 2	MOVIE	17.4	56.7	215
26	TV3 lt	Big Friday Movie/ Peter Pan	MOVIE	16.8	50.6	224
27	TV3 lt	Big Friday Movie/ treasure planet	MOVIE	16.6	49.9	252
28	LNK	Chicken little	ANIMATION	16.4	67.7	298
29	LNK	Racing stripes	MOVIE	16.4	43.1	189
30	TV3 lt	Ilya muromets and nightingale the robber	ANIMATION	16.2	76.8	289

Source: TV meter surveys

From this table one might make a conclusion that it is the movies that have the main impact on shaping the perception of the world by kids. However the top programs only show the most popular individual hits among children. We need to put it into a different perspective as well – what content do kids and teenagers spend most time watching. In other words – to combine total time spent with audiences attracted and express it as percentage. I use the list of 27 different genres and look into audience distribution in 2009 between these genre categories in two target groups – children (4-10) and teenagers (11-19). The results are shown in table 2.6.6.

TABLE 2.6.6
LITHUANIA SPLIT OF VIEWING ACROSS GENRES – KIDS vs. TEENAGERS
(across all TV stations, in %)



	PROGRAM CATEGORY	% WITHIN TARGET GORUP Kids 4-10	Teens 11-19	ALL 4+	Index vs 4+ Kids 4-10	Teens 11-19	Accumulated % Kids 4-10	Teens 11-19
1	ANIMATION	39.3	24.5	9.4	420	261	39	24
2	SERIES	13.0	16.3	15.9	82	103	52	41
3	NEWS	9.4	11.3	21.9	43	52	62	52
4	MOVIE	6.5	9.2	6.7	98	138	68	61
5	SOAP OPERA	5.4	6.0	4.8	112	124	74	67
6	ENTERTAINMENT	4.9	6.7	6.5	76	104	79	74
7	HUMOUR	4.2	5.0	5.1	83	99	83	79
8	TV MAGAZINE	2.4	2.9	4.4	55	65	85	82
9	SPECIALIZED	2.1	2.4	2.9	71	83	87	84
10	REALITY SHOW	1.8	2.5	1.7	108	151	89	87
11	LOTTERY	1.7	1.8	3.1	55	58	91	89
12	TALK SHOW	1.6	1.7	4.0	39	43	92	90
13	MUSIC	1.5	2.6	3.2	46	79	94	93
14	PUBLICISTIC	1.3	1.3	2.6	52	51	95	94
15	DOCUMENTARY	1.3	1.7	2.0	65	86	96	96
16	TV GAME	1.2	1.2	1.1	107	105	98	97
17	SPORTS & SPORT REVIEWS	0.6	0.9	1.1	50	85	98	98
18	INFO SHOW	0.5	0.7	1.2	40	57	99	99
19	INFO-ANALYTICAL	0.5	0.5	1.1	40	42	99	99
20	CHILDREN PROGRAM	0.4	0.1	0.1	278	74	99	99
21	ADVERTISING QUIZZ	0.2	0.2	0.2	151	104	100	99
22	QUIZZ SHOW	0.1	0.2	0.3	38	72	100	100
23	MORNING SHOW	0.1	0.2	0.6	19	39	100	100
24	CRIMINAL	0.0	0.0	0.1	22	32	100	100
25	Education	0.0	0.0	0.0	80	108	100	100
26	TV PLAY	0.0	0.0	0.0	71	31	100	100
27	COGNITIVE PROGRAM	0.0	0.0	0.0	27	65	100	100
	TOTAL:	100	100	100				

Source: TV Meter surveys

Animation – most important - almost 40% of relation with traditional television stations in kids target group comes via animation. Category looses popularity fast when kids become teenagers – this target group starts splitting attention towards broader spectrum of programs, with entertainment function remaining dominant compared to information function.

Since animation is absolutely leading genre category when talking about interaction of children and television, let's look at top animations across 10 years in Lithuania in this target group. See table 2.6.7.

TABLE 2.6.7
LITHUANIA – PERCENT OF TOTAL AUDIENCE WITHIN ANIMATION CATEGORY OVER LAST 10 YEARS
(across all TV stations, target group kids 4-10, 2000-2009)

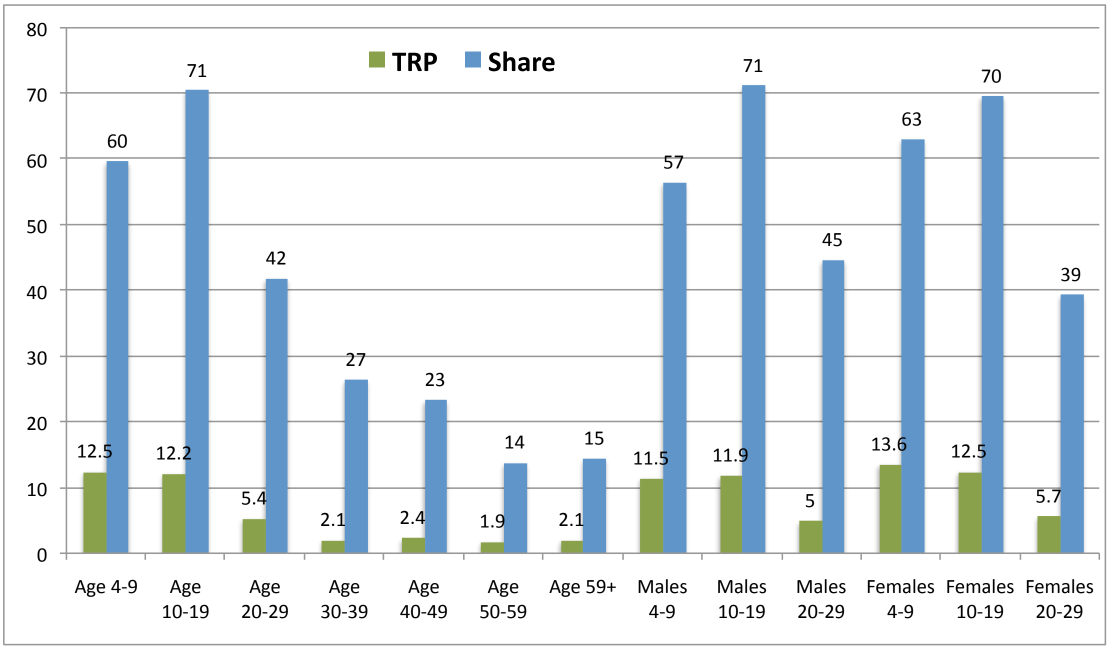
Nr.	TITLE	PERCENT	ACC%		Nr.	TITLE	PERCENT	ACC%
1	**The Simpsons**	**6.47**	**6.5**		21	Angry Beavers	0.79	39.1
2	Little Tom and Jerry	4.05	10.5		22	Ninja Turtles	0.75	39.9
3	Dragon Ball Z	3.46	14.0		23	Totally Spies	0.74	40.6
4	Pokemon	2.79	16.8		24	The Powerpugff Girls	0.72	41.3
5	Good animation	2.63	19.4		25	Samurai X	0.70	42.0
6	Spongebob squarepants	2.16	21.6		26	Batman	0.69	42.7
7	Woody Woodpecker Show	1.81	23.4		27	The Mask	0.67	43.4
8	Digimon	1.64	25.0		28	Strange family	0.67	44.1
9	Oggy and the cocroaches	1.56	26.6		29	Garfield and friends	0.66	44.7
10	Dragon ball	1.47	28.0		30	Spiderman	0.66	45.4
11	Jeckie Chan Adventures	1.43	29.5		31	Rugrats	0.65	46.0
12	Tex Avery	1.43	30.9		32	Tom and Jerry	0.65	46.7
13	Pinky and the Brain	1.22	32.1		33	The Wild Thornberrys	0.65	47.3
14	Ugly duckling	1.02	33.1		34	The simpsons (r.r.)	0.61	47.9
15	Cat and the cannary	0.92	34.1		35	Casper	0.55	48.5
16	Sabrina	0.88	34.9		36	Bratz	0.50	49.0
17	Dragon Ball GT	0.87	35.8		37	Johhny Bravo	0.50	49.5
18	Yu-gi-oh	0.85	36.7		38	Martin Greaves	0.50	50.0
19	Pink Panther	0.84	37.5		39	Funny animation	0.49	50.5
20	Sailor Moon	0.82	38.3		40	The Pink Panther	0.48	51.0

Source: TV Meter surveys

The table shows aggregated importance of individual animation series broadcasted in Lithuania over the last 10 years. It shows not the top hits, but the expression of actual interaction between kids and specific title – what percentage or weight among all animations specific title had. It is a combination of duration, number of runs and popularity. It shows the key titles that had the biggest impact on kids over last 10 years. Number one position goes to Simpsons, which also have quite large quantitative advantage over the rest of the titles on the list. The total list consists of roughly 1.800 animation titles – the top shortlist of 40 titles shown in the table represents more than 50% of viewing that children spent watching animation during the last 10 years.

Let's look at Simpsons in more detail. Chart 2.6.8 shows audience profile of Simpsons in terms of average rating and share. Due to the combination of animation format Simpsons are primarily appealing to kids, teenagers and young adults as 3 core target groups. Due to their sarcastic tone they are also slightly more popular among males than females. If we look at the actual topics in the series, we will see that Simpsons uses the standard setup of a situational comedy as its premise. The series centers on a family and their life in a typical American town – Springfield. Animated format also allowed The Simpsons to achieve a larger scope than a traditional sitcom. Springfield is a complete universe in which characters can explore the issues faced by modern society.

CHART 2.6.8
SIMPSONS – LITHUANIA – AVREAGE RATING AND SHARE IN DIFFERENT TARGET GROUPS



Source: TV Meter surveys. Average for 575 episodes. Channel – TV3.

By having Homer working in a nuclear power plant, the show can comment on the state of the environment. Through Bart and Lisa's days at Springfield Elementary School, the show's writers illustrate pressing or controversial issues in the field of education. The town features a broad spectrum of media channels - from kids' television programming to local news, which allows the producers to make jokes about themselves and the entertainment industry.

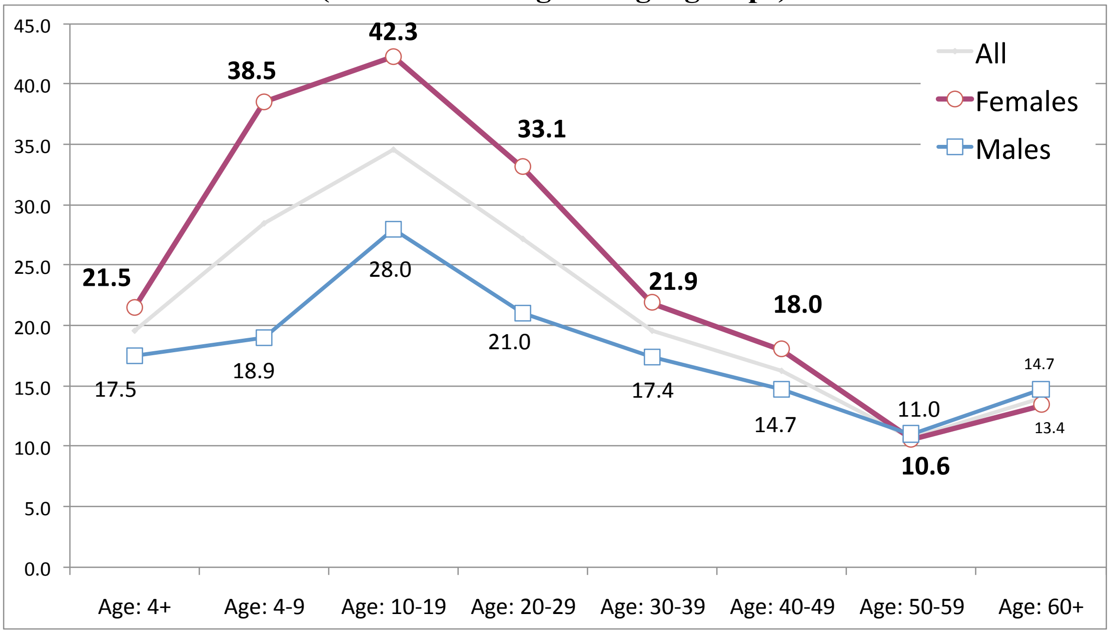
There are also opinions that the show is political in its nature. The show makes jokes across the entire political spectrum and portrays government and large corporations as callous entities that take advantage of the common worker. Authority figures are most often portrayed in an unflattering or negative light. In The Simpsons, politicians are corrupt, ministers are indifferent to churchgoers, and the local police force is incompetent. Religion also figures as a recurring theme. In times of crisis, the family often turns to God, and the show has dealt with most of the major religions. So in its essence Simpsons is a product that is very popular among kids, but in fact it deals with adult issues and by obtaining a cult status introduces adult vices of our society to kids. It is also an example how global content (typical American town) finds a perfect resonance in local context (the skepticism towards government officials and institutions such as police is very close to Lithuanian realities).

Let's look at the second point of the effect of television – equalizing gender roles between men and women.

I will use "Sex and the city" as an example. "Sex and the City" is originally an American cable television and film series, which was broadcast on HBO from 1998 until 2004 for a total of ninety-four episodes. It also became a big international hit and can be safely called a cult series. The show is set in New York City and focused on four women, three in their mid-thirties and one in her forties. Though characters have been criticized for being shallow, superficial, and self-absorbed, the show became well known and valued for its open dialogue about women and sex. It was recognized as one of the best-written stories for TV. The series had several continuing story lines. It specifically examined the lives of big-city professional women and how changing roles and expectations for women affected their characters. In addition it also tackled other social issues, such as safe sex, sexually transmitted diseases and promiscuity. Feminists analyzed "Sex and the City" both as an example of progress in women's rights and life options, and as an example of the effects of corporate culture, marketing and the more individualistic strands of feminism in presenting women's empowerment as mainly tied to achieving coupledom, beauty, and personal upward mobility, rather than collective organization for progressive change.

Let's look at how audiences related to "Sex and the city" in Lithuania – see chart 2.6.9.

CHART 2.6.9
SEX AND THE CITY – LITHUANIA
(share of viewing in target groups)



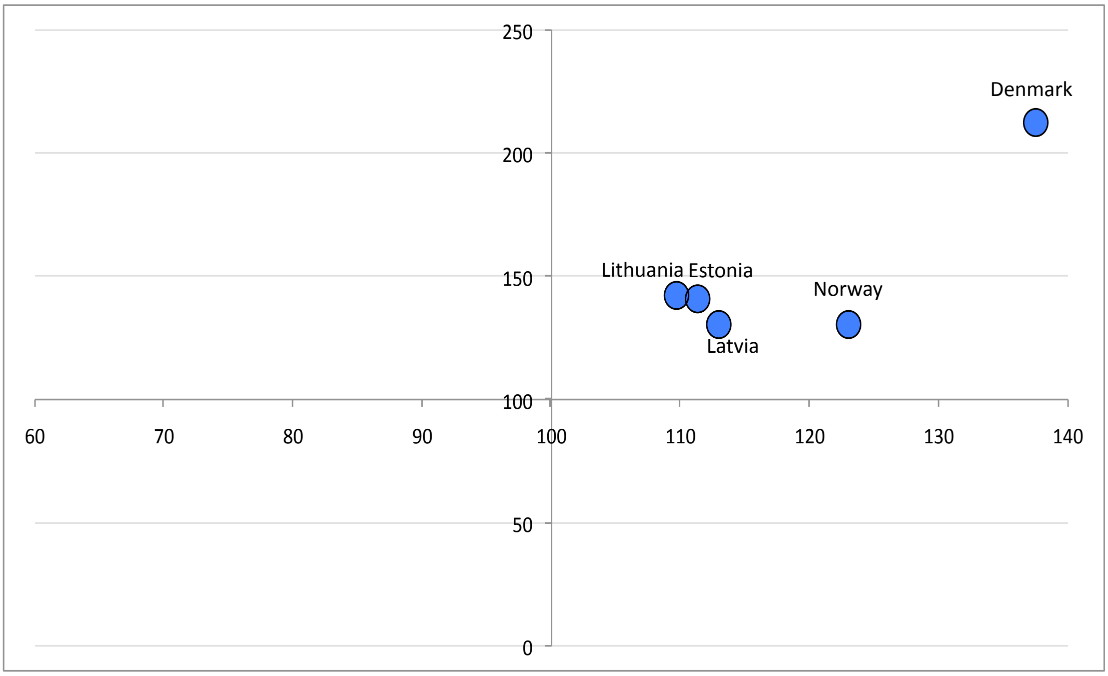
Source: TV Meter surveys. Channel - TV3. Averages for 117 shows.

Despite the fact that the main heroines are in mid 30s and one of them is in her 40s, the actual audiences that identified best with the topics of the series were much younger – it became most popular among teenagers, especially girls – 10-19. Second to that is the target group kids 4-9 only then followed by young adults 20-29. The popularity of the series goes down significantly with increasing age – in the age group of 30-39 the popularity of series is equal to overall performance in 4+ target group. After the age of 40 – Lithuanian viewers relate to the issues shown in the series to much lower extent.

Using the example of "Sex and the city" we can also look at the ways in which audiences relate to exactly the same content in different countries and cultures. The chart 2.6.10 shows the combination of affinity indexes of "Sex and the city" towards two key parameters – male vs. female audiences, and younger (15-35) vs. older audiences.

It is easy to see that these series were quite similarly perceived and built rather similar relationship with audiences in all 3 Baltic countries. In comparison – in the Scandinavian countries there was even more radical shift in acceptance of these series towards more female and younger target groups. On one hand this chart illustrates the fact that even the same content is perceived differently and different audiences identify themselves in the different ways from country to country. I.e. eventually television is a national phenomenon even despite strong globalization processes. On the other hand it also shows that in a longer term viewers form a certain expectations of what kind of content they expect to receive from particular TV channel. Even if it is not clearly defined in their own mind, it can be seen from their behavior. I will look into this issue in more details later on.

CHART 2.6.10
SEX AND THE CITY – AUDIENCES BETWEEN COUNTRIES
(affinity indexes)



Source: TV Meter surveys

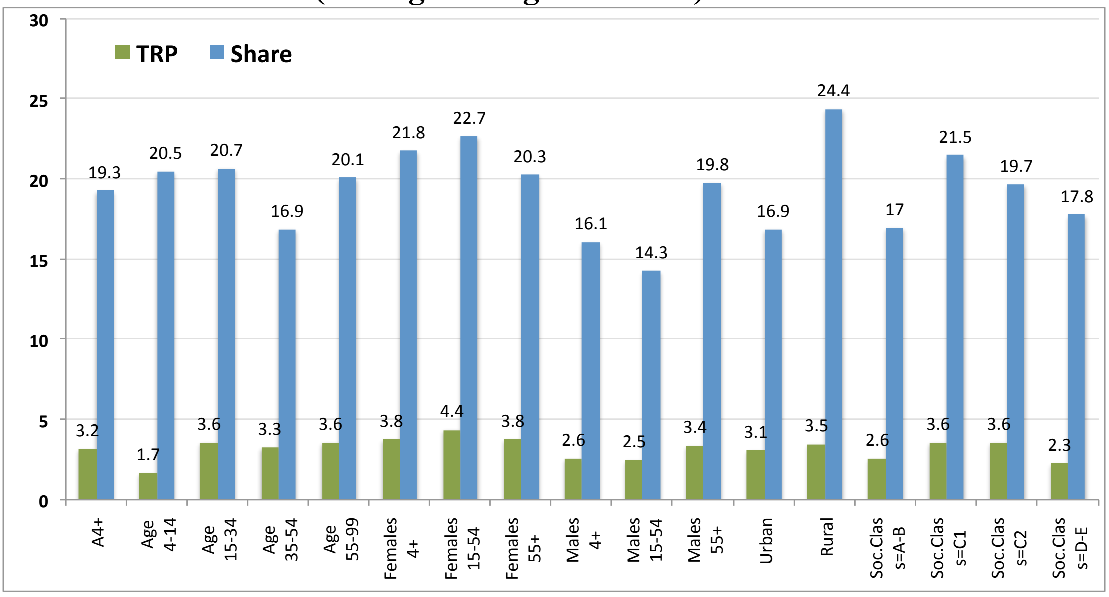
Issue 4 – television and homophobia. Brokeback Mountain.

The first gay parade – “Baltic Pride”- in Vilnius in 2010 showed a deep existing controversy in our society over the issue of homosexuality and proved that our general society is still rather homophobic. The parade itself looked more like a demonstration of all available police resources. The overall position of Vilnius municipality, which gave the permit to organize the parade, was to use the pressure from EU as an excuse why it has to be done. The event received wide media coverage and was another significant step in bringing up the issue of homosexuality to the public sphere.

Looking on international products of popular culture - “ Brokeback Mountain” is another example how movies and television are used to change the perception of societies towards homosexual issues. “Brokeback Mountain” is an American romantic-drama film that depicts the complex romantic and sexual relationship between two men in the American West from 1963 to 1983. Brokeback Mountain had the most nominations - eight - for the 78th Academy Awards, where it won three. It also received a number of other international nominations and awards. The film's significance has been attributed to its portrayal of a same-sex relationship without any reference to the history of the gay civil rights movement. This emphasizes the tragic love story aspect. Because of this, many commentators compare this story to classic and modern romances like Romeo and Juliet or Titanic.

Because of its homosexual content the film met mixed reactions in different nations. In China the film has not been shown in theaters. The state used official excuse that anticipated audience was too small and it is now worth showing the movie. Foreign media made the argument that this was only a cover and that government hostility is better explained by opposition to the homosexuality portrayed in the movie. Although the movie wasn't shown in mainland China, the mainland Chinese media praised Taiwan-born Ang Lee for his Best Director Oscar win, but state TV cut part of Lee's acceptance speech. The film was a political issue in the Middle East as well. Homosexuality is a serious crime in most of the nations in this region and a taboo subject in the few nations where it is legal. Israel was the only country in the Middle East to show the uncensored version of the film. Lebanon was the only Arab country to show the film, but in a censored format. In Europe, the Italian state-owned television channel Rai Due aired a censored version of the movie. All scenes with homoerotic references were removed. This led to protests from viewers complaining that it was impossible to follow the plot and from the Arcigay organization, which considered it an action of homophobic censorship. RAI defended itself, stating that it was a mistake of the Italian film distributor, and an uncensored version of the movie was shown a few months later. In Lithuania a commercial station LNK broadcasted the movie in late prime time in 2007 and 2008.

CHART 2.6.11
BROKE BACK MOUNTAIN – LITHUANIA
(average rating and share)



Source: TV Meter surveys. Number of shows – 2. (2007.05.26. 2008.02.07). Channel: LNK.

Since it was broadcasted on the commercial TV station with broad audience appeal the movie communicated its message to a broad spectrum of population as well. The audience profile expressed as average rating and share for both runs is shown in chart 2.6.11.

It was slightly more watched among female audiences compared to males, but overall the movie was quite well watched across broad spectrum of demographic target groups.

Channel specific expectations of the viewers

As I mentioned in the example of "Sex and the city" it is possible to make an assumption that over a longer period of time viewers form a certain habit or expectations of what kind of content they expect to get from a specific channel. Even if it is not necessarily rationally understood and well defined, it can be seen from their behavior when making selections of what to watch. I.e. TV stations become "experts" in certain areas of content. Approaching the issue from two angles can prove this:

1. The same product (e.g. movie) would be more or less successful / watched in the same country depending on the channel which shows it.
2. The same product (e.g. series) would attract different audience structure in different countries depending on the type of broadcaster.

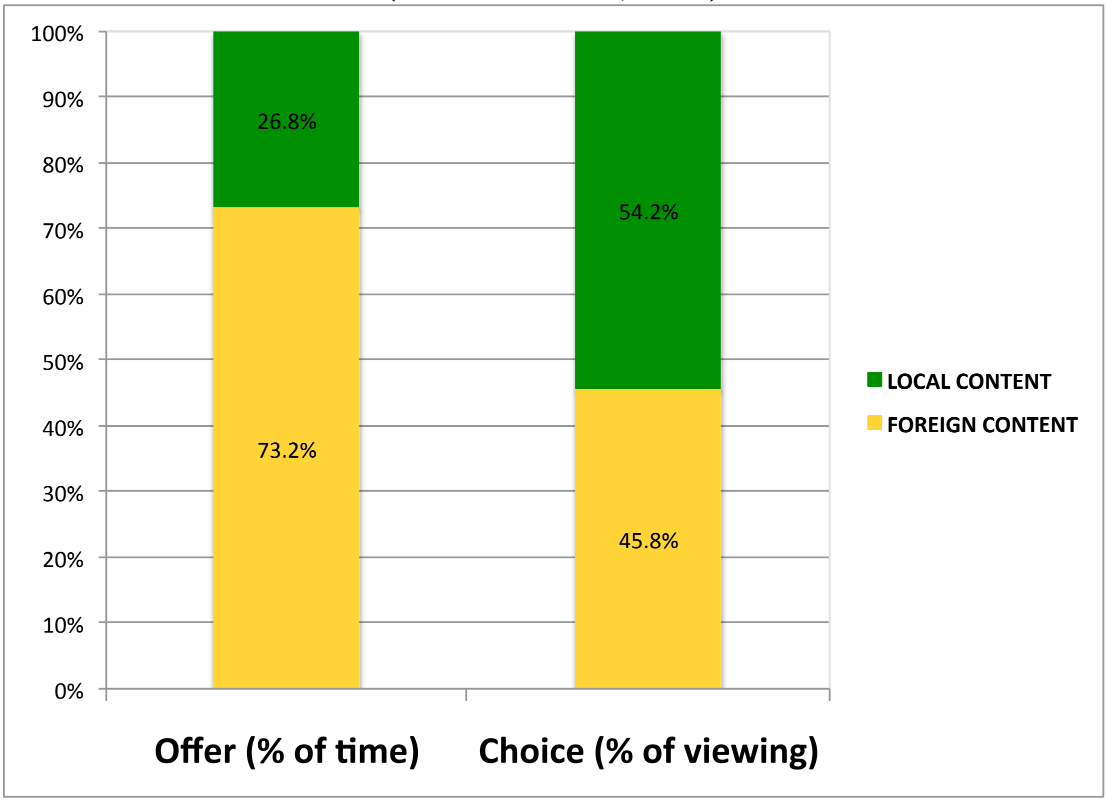
Global vs. local. The rise of the format.

If we look at the types of content available on television it can be categorized in couple of ways: according to specific genres (movies, series, news, sports, etc.) and according to the place of origin (local productions compared to international, acquired content).

Let's take the example of Lithuania – main TV stations and see how the categories of locally produced content compare to acquired one in terms of volume and popularity.

Acquired content is a direct expression of television globalization – it is affecting us not just through the increase of number of cable and satelite channels originating abroad, but also by the foreign content gaining popularity though local national TV stations.

TABLE 2.6.12
LOCAL CONTENT vs ACQUIRED (FOREIGN) CONTENT
(Lithuania 2009, in %)



Source: TV Meter surveys

We also are affected by media globalization within the category of own productions. This is related to the format trading. Format trade in my mind is the most powerful accelerator of television globalization process, because it brings global ideas closest to local mentality and this way amplifies their impact. Television is first of all local in every country. That helps it to be closest to the viewer's expectations, their needs and habits. Format is a term used in television industry to describe a set of program ideas and techniques which are already successfully used in one market and can be adapted to produce the same, but localized programs elsewhere. This process normally happens through licensing process, which exports both the rights to a successful television brand as well as a know how needed for successful production in a new country. Table 2.6.13 shows the most popular international formats that were shown in Lithuania as localized programs.

TABLE 2.6.13
THE MOST POPULAR LOCALIZED INTERNATIONAL FORMATS
(in Lithuania 2007-2009, sorted by average rating in 4+)

Nr.	INTERNATIONAL FORI	LOCAL TITLE	Year	TVR A4+	TVR A15-54	SHARE A4+	SHARE A15-54	# of Episodes	Affinity 15-54 vs	Channel
1	Lithuania's Got Talent	Lietuvos talentai. finalas	2009	22.1	23.0	47.9	54.1	1	1.04	TV3
2	Lithuania's Got Talent	Lietuvos talentai	2009	18.5	19.6	40.5	46.9	14	1.06	TV3
3	Pride of Lithuania	Lietuvos garbė 2008. apdovanojimai	2008	15.6	15.8	40.5	42.3	1	1.01	TV3
4	Pride of Lithuania	Lietuvos garbė 2007. apdovanojimai	2007	13.6	12.0	30.5	28.9	1	0.88	TV3
5	All Together Now	Penktadienio muzikos šou	2007	13.2	10.8	38.0	37.2	25	0.82	TV3
6	Date My Mom	Pagal mamą	2007	11.4	10.3	28.9	30.1	17	0.90	TV3
7	Karaoke Showdown	Padainuokim	2007	10.7	9.5	28.9	30.6	17	0.89	TV3
8	Hole in the Wall	Skylė sienoj	2008	10.4	11.1	24.5	29.3	16	1.07	TV3
9	Distraction	Stresas	2007	10.2	10.6	25.6	29.6	22	1.04	TV3
10	Next!	Kitas	2007	10.0	10.1	31.1	34.1	20	1.01	LNK
11	Karaoke Showdown	Padainuokim	2008	9.7	8.3	28.3	29.1	42	0.86	TV3
12	Karaoke Showdown	Padainuokim	2009	9.6	8.7	22.8	24.8	9	0.91	TV3
13	Next!	Kitas	2008	9.6	9.7	29.5	32.4	32	1.01	LNK
14	Deal or No Deal	Taip arba ne	2007	9.6	9.1	27.8	30.3	38	0.95	TV3
15	Deal or No Deal	Taip arba ne	2008	9.5	8.8	26.1	28.2	53	0.93	TV3
16	Deal or No Deal	Taip arba ne	2009	9.4	8.5	23.5	25.8	17	0.90	TV3
17	Thanks God You're Here	Ačiū dievui, atėjai	2008	9.2	9.3	21.3	24.8	5	1.01	TV3
18	Singing Office	Superpenketukas. finalas	2007	8.7	10.7	28.3	33.8	1	1.23	TV3
19	Pride of Lithuania	Lietuvos garbė 2008	2008	8.6	9.8	24.1	28.9	8	1.14	TV3
20	Heaven or Hell	Po velnių	2007	8.5	8.7	19.9	22.8	12	1.02	TV3
21	Deal or No Deal	Taip arba ne. megamilijonas	2009	7.9	7.5	21.8	23.9	3	0.95	TV3
22	1 vs. 100	Vienas prieš visus	2009	7.8	5.7	18.5	15.2	21	0.73	LNK
23	Psychic Challenge	Ekstrasensų mūšis tv3	2009	7.8	7.5	21.4	24.2	16	0.96	TV3
24	Ex Wives Club	Sudaužytų širdžių klubas	2007	7.7	6.3	28.5	26.9	19	0.82	TV3
25	Ranking the Stars	Supertortas	2009	7.5	6.6	18.5	18.7	15	0.88	LNK
26	Singing Office	Superpenketukas	2007	7.3	7.2	20.4	24.1	13	0.99	TV3
27	1 vs. 100	Vienas prieš visus	2008	7.2	6.1	18.9	18.2	17	0.85	LNK
28	Are you Smarter than a 5th Grader	Penktokų iššūkis	2009	6.9	6.4	21.5	23.0	7	0.93	TV3
29	Cash Cab	Pinigų taksi	2008	6.8	6.7	21.3	23.2	22	0.99	LNK
30	Hole in the Wall	Skylė sienoj	2009	6.7	7.1	17.9	21.5	13	1.06	TV3
31	Are you Smarter than a 5th Grader	Penktokų iššūkis	2008	6.6	6.0	24.3	25.2	41	0.91	TV3
32	Thanks God You're Here	Ačiū dievui, atėjai	2007	6.6	5.7	17.4	17.1	17	0.86	TV3
33	If	Jeigu	2007	6.4	4.8	20.1	17.5	38	0.75	LNK
34	Alternative Love	Meilės trikampis	2009	6.3	6.7	20.6	24.6	31	1.06	TV3
35	Next!	Kitas	2009	6.2	5.9	21.1	23.5	18	0.95	LNK
36	Ex Wives Club	Sudaužytų širdžių klubas	2008	6.2	5.1	25.8	24.9	24	0.82	TV3
37	Fame Factory	Dangus 2. atidarymo koncertas	2007	5.7	6.5	21.2	26.4	1	1.14	TV3
38	Deal or No Deal	Taip arba ne. mega 5	2009	4.5	3.3	18.0	16.0	1	0.73	TV3
39	Fame Factory	Dangus 2. savaitės finalas	2007	4.4	4.7	18.3	21.2	12	1.07	TV3
40	Deal or No Deal	Taip arba ne. mega 4	2009	4.1	3.5	16.8	16.7	1	0.85	TV3
41	Karaoke Showdown	Padainuokim. geriausios laidos	2009	4.0	3.6	16.2	17.3	5	0.90	TV3
42	Fame Factory	Dangus 2. superfinalas	2007	3.2	3.1	17.9	19.1	1	0.97	TV3
43	Hole in the Wall	Skylė sienoj. geriausios laidos	2009	2.9	2.9	13.5	16.1	5	1.00	TV3

Source: TV Meter surveys.

Probably one of the oldest ideas that are still exported and still successful in CEE region today - the program "What's my line" – which was first re-made by BBC back in 1950s. We can still find it successfully performing in the prime time lineups of television schedules today as a modern day entertainment format e.g. Lietuvos Rytas TV in Lithuania.

Television formatting became a widespread phenomenon in 1990s and included variety of program genres. Examples – US game shows such as "The wheel of fortune" (originated in 1975), "The price is right" (created in 1956), "Jeopardy" (created in 1964).

Though format trade was of rather ad-hoc nature in the beginning and was poorly formalized, it grew significantly over the past decades and is currently well protected by laws as well as grew into a significant business areas of international media corporations (e.g. Fremantle media – biggest global format producer - owned by RTL group and specializing in format trade and production accounted for 22% of the annual group revenue and 20.5% of group profits in 2009).

One of the main reasons for such increase in the area of format trading lies in the worldwide expansion of television channels. Faced with increased struggle for TV ratings, TV broadcasters and producers are more inclined to adapt an already successful program format with a proven track record and detailed production manuals available compared to more risky way of experimenting and developing original format.

Format trade has evolved into serious industry events, such as MIPCOM, MIPTV and DISCOP.

The relationship of television and viewer audiences is constructed on the offer and choice principle. TV stations forecast what viewers want and try to offer attractive programs, which go through a selection and "voting" process from the side of the viewers. This means that most popular programs illustrate the relevance of content to the expectations of broad audiences. In this section I look at the relationship between the viewers and different types of programs they are offered. I use viewing in Lithuania in 2009. Table 2.6.14 shows the average viewing within different age groups split by genres.

The table also shows comparison of viewing structure within specific age group to the viewing structure in general population (all 4+) expressed as indexes on the right column in the table.

The top 10 categories in the table are specifically marked – these are the types of the programs that represent in average 75% of total interaction with television in each of the age groups, the rest is scattered across a number of smaller niche genres.

The most popular content category in the overall population is the news – it represented 21.8% of all viewing in 2009. However the interest towards the news shows big differences between the age groups – it ranges from 9.8% among kids (index 45 vs. 4+) up to 27.6 among older population (index 127 vs. 4+). In general news is less important part of choices done by people under 35 years. Among the adults 35-54 news is on the same level as among general population (index 101) and the key audience, which makes choices in favor of the news, are older people 55+.

The second most popular category – series – is more preferred by young adults 15-34 and adults 35-54 (indexes vs. 4+ are 112 and 109) compared to both youngest (index 88) and oldest (index 89) groups of the population.

Animation – the third category is most important part of television experience among kids – it is number one category in this target group. Combined between original animation shows and their repeats 35% of viewing experience among kids comes from animation – index of this category among children compared to general population is 376. However animation is not only popular among children – it also has index of 146 in the target group of adults 15-34. Both part of this target group still watching some of the animations on their own, as well as young parents watching animation together with their children explain this. The interest in animation category drops significantly with age - in the older target groups comparison index to general population drops down to 64 and 38.

Individual movies are always entering the lists of most popular programs on television. As a category for a longer period of time it is also an important part of television choices – number 4 category on the list with 6.3% of viewing attributed to this category in general population. This category is popular in all age groups except the oldest part of population 55+. This is the only age group where index compared to 4+ is below 100 (59). Age group that is choosing movies most willingly is young adults 15-35 (index in this target group compared to general population is 134).

TABLE 2.6.14
LITHUANIA 2009 - SOV DISTRIBUTION WITHIN GENRE CATEGORIES BY AGE GROUPS

	GENRE	AGE [SOV in % by genres]					PATTERN OF VIEWING DISTRIBUTION					AGE [Index vs 4+]			
		All 4+	Age 4-14	Age 15-34	Age 35-54	Age 55+	All 4+	Age 4-14	Age 15-34	Age 35-54	Age 55+	Age 4-14	Age 15-34	Age 35-54	Age 55+
ORIGINAL SHOWS	**News**	**21.8**	**9.8**	**15.9**	**22.1**	**27.6**						45	73	101	127
	Series	**14.2**	**12.5**	**15.8**	**15.4**	**12.7**						88	112	109	89
	Animation	**8.3**	**31.3**	**12.2**	**5.4**	**3.2**						376	146	64	38
	Movies	**6.3**	**7.3**	**8.5**	**7.8**	**3.7**						116	134	124	59
	Entertainment	**5.1**	**4.0**	**5.0**	**5.3**	**5.3**						77	98	103	104
	Soap opera	**4.8**	**5.5**	**5.0**	**3.9**	**5.1**						114	105	82	107
	Humour	**4.5**	**3.9**	**5.0**	**5.0**	**3.9**						88	112	112	87
	TV Magazines	**3.7**	**2.0**	**3.0**	**3.8**	**4.3**						56	81	103	119
	Talk Shows	**3.4**	**1.2**	**2.2**	**3.4**	**4.6**						36	65	99	135
	Lotteries	**3.1**	**1.7**	**2.0**	**2.8**	**4.3**						54	64	88	139
	Music programs	2.71	1.43	2.00	2.41	3.63						53	74	89	134
	Specialized	2.37	1.80	2.14	2.51	2.52						76	90	106	106
	Publicistic	2.29	1.11	1.59	2.40	2.88						48	69	105	125
	Documentary	1.59	1.12	1.49	1.69	1.67						71	94	106	105
	Reality shows	1.30	1.63	1.83	1.29	0.93						126	141	99	72
	Info Shows	1.16	0.51	0.80	1.26	1.44						44	69	108	124
	Info-Analytic	1.10	0.45	0.69	1.05	1.52						41	63	96	138
	TV Game	0.99	1.07	1.13	0.95	0.94						107	114	95	94
	Sports	0.79	0.47	0.91	0.90	0.71						59	115	114	90
	Morning Shows	0.60	0.11	0.51	0.69	0.68						19	85	116	115
	Quiz Shows	0.29	0.13	0.22	0.29	0.36						45	77	100	125
	Sport reviews	0.22	0.11	0.25	0.27	0.20						49	113	121	88
	Advertising quiz	0.16	0.22	0.16	0.14	0.15						138	104	89	97
	Criminal	0.13	0.03	0.09	0.14	0.16						21	73	110	125
	Children program	0.12	0.26	0.13	0.10	0.09						222	111	85	77
	Cognitive prpgrams	0.04	0.02	0.03	0.05	0.05						43	69	118	116
	TV play	0.03	0.02	0.02	0.04	0.03						55	63	118	117
	Education	0.02	0.02	0.02	0.02	0.02						109	96	89	108
	TOTAL original shows:	**91.1**	**89.7**	**88.6**	**91.0**	**92.8**						**99**	**97**	**100**	**102**
REPEATS	Series Rep	1.70	1.29	2.11	1.84	1.46						76	124	108	86
	Entertainment Rep	1.35	1.50	1.97	1.30	1.02						111	145	96	76
	Animation Rep	1.05	3.65	1.49	0.78	0.41						348	142	74	39
	Tv Magazine Rep	0.74	0.48	0.85	0.74	0.73						65	115	101	99
	Humour Rep	0.62	0.58	0.69	0.67	0.56						93	111	108	89
	Talk Show Rep	0.61	0.29	0.61	0.61	0.68						48	100	101	111
	Music programs Rep	0.52	0.40	0.65	0.46	0.53						77	124	89	100
	Specialized Rep	0.52	0.38	0.72	0.62	0.37						73	138	119	70
	Documentary Rep	0.43	0.38	0.51	0.46	0.37						87	119	108	86
	Reality Show Rep	0.36	0.43	0.53	0.37	0.24						121	149	102	67
	Movie Rep	0.34	0.36	0.47	0.39	0.22						107	138	116	65
	Publicistic Rep	0.26	0.14	0.26	0.29	0.27						55	101	109	103
	Tv Game Rep	0.11	0.14	0.18	0.09	0.08						129	164	81	72
	Sport Rep	0.09	0.07	0.10	0.10	0.07						81	115	118	82
	Soap Opera Rep	0.05	0.05	0.07	0.07	0.03						94	140	140	48
	Other repeats	0.15	0.10	0.14	0.15	0.16						70	95	101	109
	TOTAL Repeats:	**8.9**	**10.3**	**11.4**	**9.0**	**7.2**						115	128	101	81

Source: TV Meter surveys

Entertainment category (accounting for 5.1% of television viewing in general population) is very equally spread across all target groups, with exception of kids.

Soap operas (4.8% of viewing in general target audience) are popular among older people (index 107 in 55+) as well as kids (index 114 in 4-14). Because of the trend of showing more modern telenovelas (e.g. “Ne Rodis Krasivoj”, “Gata Salvaje”), which show young people and deal with modern problems in more urban environments, this category also gains popularity among young adults – in the age group 15-34 index is 105. The only age group, which is less likely to choose telenovela, is adults 34-54.

Humor category (#7 on the list with 4.5% of total viewing) show similar pattern as movies category – it has 112 index in both young adults 15-34 and adults 35-54, but it has lower than 100 index in both children (index 88) and older people (index in 55+ target group is 87).

The last 3 categories on the top 10 list – TV magazines, Talk shows and lotteries show quite similar pattern – they are important parts of television choices for older people, but are not important among younger population.

Examining the same table in a vertical way in each category we can identify the genres, which are most appealing for individual age groups.

Among children – most popular genres that are most children skewed compared to general audience are animation, movies, soap operas, reality shows.

Among young adults (15-34) – series, animation, movies, soap operas, humor, reality shows and sports.

Among adults (35-54) – news, series, movies, entertainment, humor, TV magazines. In the more niche categories also publicistics, specialized programs, documentaries, info shows, sports.

Among older people (all 55+) – news, entertainment, soap operas, TV magazines, talk shows, lotteries and music programs (this category includes traditional shows for sending greetings on birthdays and other occasions). On more fragmented niches the choices in this age group are also more skewed towards the programs of "informative" type – publicistics, documentary, info shows, info-analytic, quiz shows, cognitive programs, etc. It is also interesting to compare the proportions of the viewing in the same table split between the original runs and repeats. This shows that older people are slightly more inclined to watch original programs and adjust their daily routines according to the TV schedules, while young adults behave in the opposite way – they are the most active group when it comes to watching the repeats.

Table 2.6.15 shows the same distribution by genres but with split between male and female age groups.

TABLE 2.6.15
LITHUANIA 2009 - SOV DISTRIBUTION
WITHIN GENRE CATEGORIES BY AGE AND GENDER GROUPS

	GENRE	SOV % BY GENRES											IDEXES VS 4+									
			MALES					FEMALES					MALES					FEMALES				
		All 4+	Males 4+	Males 4-14	Males 15-34	Males 35-54	Males 55+	Females 4+	Females 4-14	Females 15-34	Females 35-54	Females 55+	Males 4+	Males 4-14	Males 15-34	Males 35-54	Males 55+	Females 4+	Females 4-14	Females 15-34	Females 35-54	Females 55+
ORIGINAL SHOWS	**News**	**21.8**	**21.7**	**8.8**	**15.7**	**23.7**	**28.5**	**21.9**	**10.8**	**16.0**	**20.8**	**27.2**	100	41	72	109	131	100	49	74	95	125
	Series	**14.2**	**13.3**	**11.1**	**14.9**	**14.1**	**12.1**	**14.7**	**13.9**	**16.5**	**16.5**	**12.9**	94	78	105	100	85	104	98	117	116	91
	Animation	**8.3**	**9.6**	**34.6**	**13.1**	**5.4**	**2.7**	**7.5**	**28.0**	**11.4**	**5.4**	**3.4**	115	415	157	64	33	90	337	137	65	41
	Movies	**6.3**	**7.1**	**7.4**	**9.3**	**8.5**	**4.0**	**5.8**	**7.3**	**7.9**	**7.2**	**3.6**	112	117	147	135	63	92	116	125	115	57
	Entertainment	**5.1**	**4.8**	**3.5**	**4.9**	**4.9**	**5.1**	**5.4**	**4.4**	**5.1**	**5.7**	**5.4**	94	68	96	95	100	104	86	100	110	106
	Soap opera	**4.8**	**3.3**	**4.6**	**3.0**	**2.9**	**3.3**	**5.8**	**6.3**	**6.6**	**4.7**	**6.0**	68	96	63	60	70	122	133	138	100	127
	Humour	**4.5**	**4.8**	**4.0**	**5.5**	**5.0**	**4.3**	**4.2**	**3.8**	**4.6**	**5.0**	**3.6**	108	90	124	113	97	95	85	103	111	82
	TV Magazines	**3.7**	**3.4**	**1.8**	**2.8**	**3.4**	**4.3**	**3.8**	**2.3**	**3.1**	**4.0**	**4.4**	93	50	78	94	117	105	62	84	110	119
	Talk Shows	**3.4**	**3.1**	**1.2**	**1.9**	**3.3**	**4.3**	**3.7**	**1.3**	**2.5**	**3.5**	**4.8**	89	35	57	96	125	107	37	72	102	140
	Lotteries	**3.1**	**3.2**	**1.8**	**2.1**	**3.0**	**4.7**	**3.0**	**1.6**	**1.9**	**2.5**	**4.2**	104	57	68	96	152	98	51	62	81	133
	Music programs	2.71	2.49	1.17	1.92	2.26	3.59	2.86	1.69	2.07	2.53	3.65	92	43	71	83	133	106	62	76	93	135
	Specialized	2.37	2.46	1.82	2.30	2.62	2.63	2.31	1.77	2.02	2.42	2.47	104	77	97	111	111	97	75	85	102	104
	Publicistic	2.29	2.15	1.01	1.54	2.30	2.82	2.39	1.20	1.64	2.49	2.90	94	44	67	100	123	104	52	71	108	126
	Documentary	1.59	1.67	1.24	1.61	1.83	1.71	1.53	1.01	1.41	1.58	1.65	105	78	101	115	107	96	63	89	99	104
	Reality shows	1.30	1.36	1.59	2.07	1.17	0.96	1.26	1.67	1.65	1.39	0.91	105	123	159	90	74	97	128	127	107	70
	Info Shows	1.16	1.21	0.49	0.88	1.28	1.64	1.13	0.54	0.74	1.24	1.35	104	42	76	110	141	97	46	63	107	116
	Info-Analytic	1.10	1.09	0.41	0.72	1.10	1.58	1.11	0.49	0.67	1.02	1.48	99	37	65	100	144	101	44	61	93	135
	TV Game	0.99	1.01	1.02	1.10	0.93	1.03	0.98	1.11	1.15	0.96	0.89	102	103	111	94	103	99	112	116	96	90
	Sports	0.79	1.08	0.50	1.11	1.33	1.02	0.58	0.43	0.75	0.54	0.55	138	63	141	169	129	74	55	95	69	70
	Morning Shows	0.60	0.55	0.06	0.51	0.70	0.60	0.63	0.17	0.50	0.68	0.73	93	11	86	118	101	105	28	84	115	122
	Quiz Shows	0.29	0.30	0.13	0.24	0.29	0.41	0.28	0.13	0.21	0.29	0.34	103	44	82	101	140	98	46	73	100	118
	Sport reviews	0.22	0.28	0.10	0.34	0.36	0.23	0.18	0.11	0.18	0.20	0.18	128	47	153	161	105	81	51	82	88	80
	Advertising quiz	0.16	0.17	0.27	0.18	0.16	0.15	0.15	0.17	0.15	0.13	0.15	110	170	116	101	94	93	106	95	80	99
	Criminal	0.13	0.11	0.03	0.09	0.12	0.14	0.14	0.03	0.09	0.16	0.17	85	23	73	94	107	110	20	73	124	134
	Children program	0.12	0.11	0.20	0.12	0.11	0.08	0.12	0.31	0.14	0.09	0.09	100	178	100	99	73	100	268	119	74	79
	Cognitive prpgrams	0.04	0.04	0.02	0.03	0.05	0.05	0.04	0.02	0.03	0.05	0.05	95	43	70	116	110	103	42	68	119	120
	TV play	0.03	0.03	0.01	0.02	0.03	0.03	0.03	0.02	0.02	0.04	0.04	89	32	60	104	114	108	78	66	129	119
	Education	0.02	0.02	0.03	0.02	0.02	0.02	0.02	0.02	0.02	0.02	0.02	104	136	97	89	112	97	81	96	88	106
	TOTAL original shows:	**91.1**	**90.4**	**88.8**	**88.1**	**90.9**	**92.1**	**91.6**	**90.7**	**89.1**	**91.2**	**93.2**	99	98	97	100	101	101	100	98	100	102
REPEATS	Series Rep	1.70	1.82	1.22	2.00	1.98	1.74	1.62	1.37	2.21	1.73	1.32	107	72	117	116	102	95	80	130	102	77
	Entertainment Rep	1.35	1.37	1.33	2.07	1.20	1.06	1.34	1.68	1.88	1.38	1.00	101	98	153	89	79	99	124	139	102	74
	Animation Rep	1.05	1.31	4.59	1.85	0.74	0.39	0.87	2.70	1.21	0.81	0.42	125	437	176	71	37	83	257	115	77	40
	Tv Magazine Rep	0.74	0.65	0.46	0.72	0.67	0.65	0.79	0.51	0.94	0.80	0.76	89	62	98	92	89	108	69	128	109	104
	Humour Rep	0.62	0.67	0.59	0.75	0.68	0.64	0.59	0.57	0.65	0.66	0.52	108	95	120	110	102	94	91	104	106	83
	Talk Show Rep	0.61	0.62	0.33	0.65	0.56	0.76	0.60	0.24	0.58	0.66	0.63	102	55	106	92	124	99	40	95	108	104
	Music programs Rep	0.52	0.46	0.34	0.49	0.42	0.51	0.57	0.47	0.77	0.51	0.53	87	64	94	79	98	109	90	147	97	102
	Specialized Rep	0.52	0.67	0.48	0.99	0.71	0.45	0.42	0.27	0.51	0.54	0.32	128	93	190	138	87	80	53	98	105	61
	Documentary Rep	0.43	0.52	0.45	0.62	0.55	0.45	0.36	0.30	0.42	0.39	0.33	122	104	145	129	104	85	70	98	91	77
	Reality Show Rep	0.36	0.40	0.47	0.51	0.40	0.30	0.33	0.40	0.55	0.34	0.21	112	130	142	111	84	92	111	155	94	58
	Movie Rep	0.34	0.37	0.38	0.47	0.42	0.24	0.32	0.34	0.46	0.38	0.21	109	113	140	123	70	94	102	135	111	62
	Publicistic Rep	0.26	0.27	0.14	0.24	0.32	0.29	0.25	0.15	0.28	0.25	0.26	105	54	92	124	111	97	56	108	97	98
	Tv Game Rep	0.11	0.11	0.14	0.14	0.09	0.09	0.11	0.14	0.21	0.10	0.08	96	130	126	77	80	103	128	187	88	68
	Sport Rep	0.09	0.12	0.08	0.12	0.14	0.11	0.06	0.06	0.08	0.07	0.05	138	97	138	158	131	74	65	98	85	57
	Soap Opera Rep	0.05	0.05	0.05	0.11	0.04	0.01	0.06	0.05	0.04	0.10	0.03	91	89	216	79	13	106	99	82	189	66
	Other repeats	0.15	0.16	0.12	0.12	0.19	0.19	0.14	0.09	0.16	0.12	0.15	110	77	82	125	124	93	63	105	81	101
	TOTAL Repeats:	**8.9**	**9.6**	**11.2**	**11.9**	**9.1**	**7.9**	**8.4**	**9.3**	**10.9**	**8.8**	**6.8**	108	125	133	102	89	95	105	123	99	77

Source: TV Meter surveys

In comparison to the previous table this split illustrates differences between men and women in different age groups – e.g. the news is more important in older age groups, but this split also shows that it is slightly more important choice in the target group of older males compared older females. On entertainment category more male (especially younger males) attention is devoted to movies, while relation-based telenovela stories are bigger part of female relation to television. Animation is more significant part of viewing choices among boys compared to girls. Talk shows are more attractive for females over 35, while it increases in importance among men in older age categories. Looking at more niche choices – lotteries are more important for males, so are reality shows and sports. Though repeats of the programs are more common for people aged between 15-34, this activity is also more common for men compared to women.

Table in the appendix 2 also provides further splits according to the criteria or urbanization, reception and social class. The most vivid deviations here are telenovelas and lottery shows preferred by lower social classes.

2.7. THE ROLE OF PUBLIC BROADCASTER

Public broadcasters are in principle different from commercial broadcasters. This section looks a bit more into the details of public broadcasters, how they function, how viewers relate to them and how public broadcasters in different countries cooperate with each other. Here I also test the **hypothesis that the role and the size of public broadcasting are similar in all European countries. Public broadcasters are more focused on cultural mission and therefore appealing to more narrow audiences.**

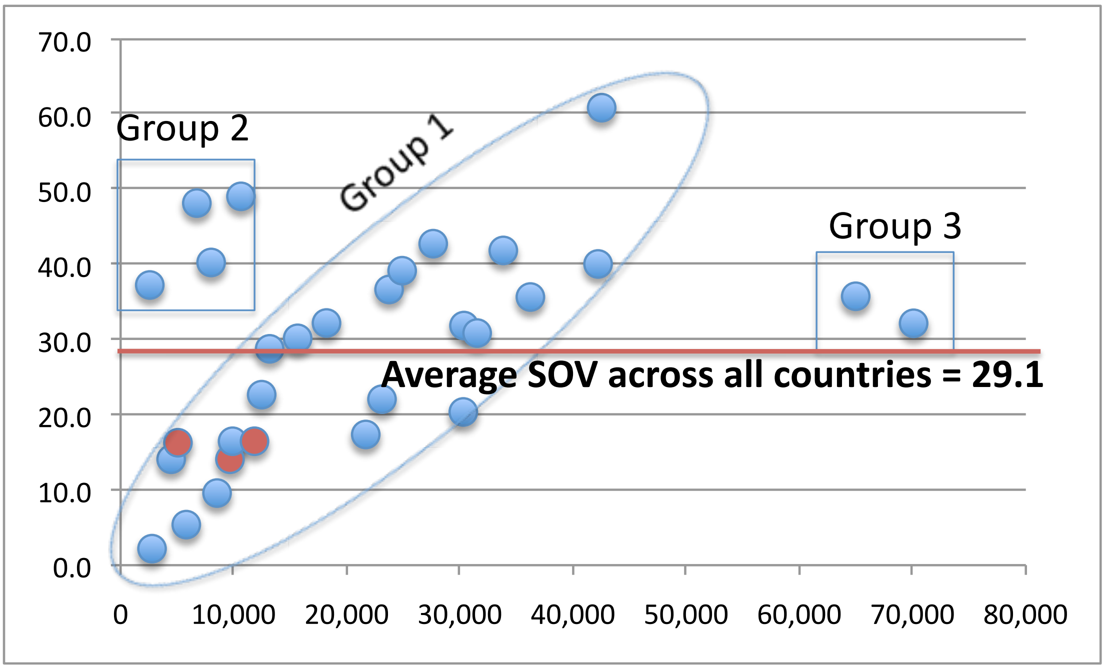
The main thing that all public broadcasters have in common is – commitment to the "promotion of public service values".

Economic development of a country and position of public broadcaster

Statement: Public broadcaster plays more important role in more developed countries, than in developing ones.

To test this statement I look into the distribution of GDP per capita in comparison to average share of viewing of public broadcasters in 30 European countries. I use broad adult target group and look at situation in 2008.

CHART 2.7.1
GDP PER CAPITA VS SOV OF PUBLIC BROADCASTER
(in EUR and %)



Data source: IP. Baltic countries marked in red.

Across the entire list of countries the correlation between GDP and SOV of public broadcaster is rather low (R=0.43), but the scatter plot shows a clear pattern of 3 groups:

GROUP 1 [MAIN PATTERN] – The better is living standard, the more important role public broadcaster plays. Countries with rather clear general pattern of positive correlation between GDP and SOV of public broadcaster (most numerous = 24 out of 30). The correlation within this segment is 0.84. All three Baltic countries are in this group on the low end compared to other European countries – we are still on low economic development levels and have rather weak public broadcasters.

GROUP 2 [OUTLIER CATEGORY 1]– Strong public broadcaster in low GDP countries.

Four countries from the former eastern block belong to this category – Russia, Poland, Serbia and Croatia. Though living standards in these countries are on the lower levels compared to European averages, and only two of them have clearly defined license fees for television, the role of public channels is rather high. To me it seems like a result of historical state monopoly on television with specific emphasis on the ideological power of the media (especially in Russia). TV stations receive strong state support not via introduction of license fee, but via allocation of means directly from the budgets as well as legislative setup in the area of television. At the same time their battle for viewer attention is also successful.

GROUP 3 [OUTLIER CATEGORY 2] – Two luxury states.

Two other countries – Switzerland and Norway are deviating on the other side of the main pattern. To me it is best explained by the deviation of these countries from the European averages in terms of GDP per capita. Both of them are relatively small in terms of size of the country in combination with extremely high living standards compared to the other countries.

Full list of countries grouped into the three groups is presented in the Appendix 3.

Audience profiles of public broadcasters

Statement: Public broadcasters are more popular among older and less economically attractive audiences.

Table 2.7.2 shows average share of viewing of the main channel of public broadcaster in individual countries and different target groups. In order to have comparable data – target groups are narrowed down to the most basic ones – age, sex, and type of settlement.

Since the overall position of public broadcaster is quite different among the countries – ranging from 11.2% in Latvia up to 36% in Norway, for better comparison of the trends the table 2.5 is also translated into index of SOV in each target group compared to 4+.

TABLE 2.7.2
PROFILES OF PRIMARY CHANNELS OF PUBLIC BROADCASTERS
(SOV in target groups, average for 2005-2009)

SOV of main channel of national broadcaster (average 2005-2009)

	Target	Lithuania (LTV)	Latvia (LTV1)	Estonia (Eesti TV)	Norway (NRK1)	Denmark (DR1)
ALL	All 4+	13.5	11.2	16.4	35.9	25.4
AGE	Age: 4-14	8.5	4.9	11.6	28.0	28.9
	Age:15-34	9.4	5.0	11.0	19.9	17
	Age:35-54	13.2	8.5	15.1	34.9	25.8
	Age: 55+	18.1	18.5	21.6	50.0	29.9
SEX	Males: 4+	13.4	9.6	16.4	36.0	24.9
	Males: 15-54	11.9	6.4	13.6	28.3	21.2
	Males: 55+	19.0	17.5	22.3	50.6	29.6
	Females: 4+	13.5	12.3	16.4	35.7	26.1
	Females: 15-54	11.2	7.5	13.1	27.8	22.2
	Females: 55+	17.7	19.1	21.2	49.5	30.1
RESIDENCY	Urban	13.2	9.2	13.9	34.4	24.2
	Rural	13.9	16.2	22.3	37.6	28.6
RECEPTION	Multichannel	11.1		10.2		
	Analogue / terrestial	15.9		27.9		

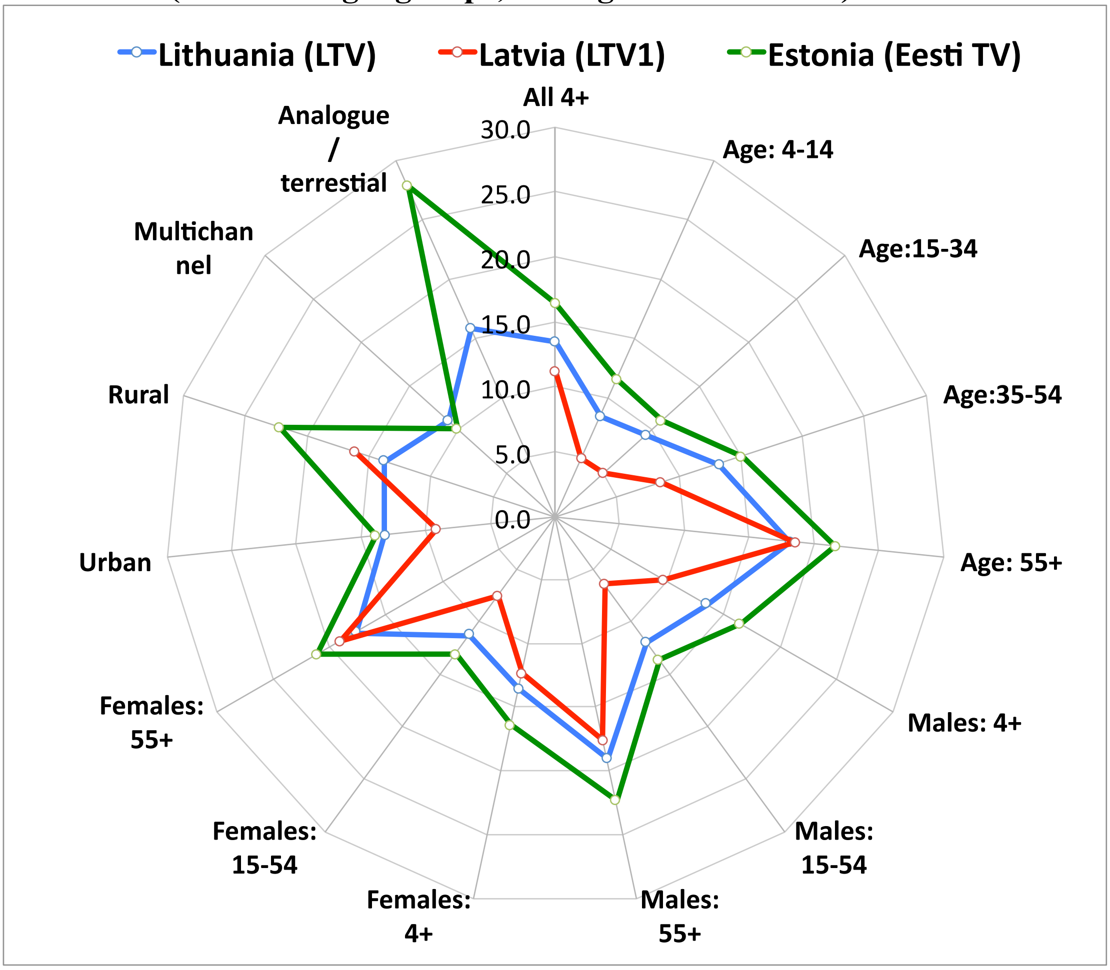
Expressed as Indexes vs main target group (All 4+)

	Target	Lithuania (LTV)	Latvia (LTV1)	Estonia (Eesti TV)	Norway (NRK1)	Denmark (DR1)
AGE	Age: 4-14	63	44	71	78	114
	Age:15-34	70	45	67	55	67
	Age:35-54	98	76	92	97	102
	Age: 55+	134	165	132	139	118
SEX	Males: 4+	99	86	100	100	98
	Males: 15-54	88	57	83	79	83
	Males: 55+	141	156	136	141	117
	Females: 4+	100	110	100	99	103
	Females: 15-54	83	67	80	77	87
	Females: 55+	131	171	129	138	119
RESIDENCY	Urban	98	82	85	96	95
	Rural	103	145	136	105	113
RECEPTION	Multichannel	82		62		
	Analogue / terrestial	118		170		

Source: TV meter surveys.

What we see is quite common trend across all countries that public broadcaster is much more popular among older people compared to general audience or younger audiences. The main part of audience share in 7 out of 8 cases is generated in the target group of 55+. Exception is Denmark, where the main channel of public broadcaster is quite popular among kids as well as older audiences. But it is a general trend that main TV stations of public broadcasters in these countries have weaker positions among younger and economically active people, where commercial channels keep their focus. Data from table 2.5 for the three Baltic countries is also expressed as a chart 2.7.3.

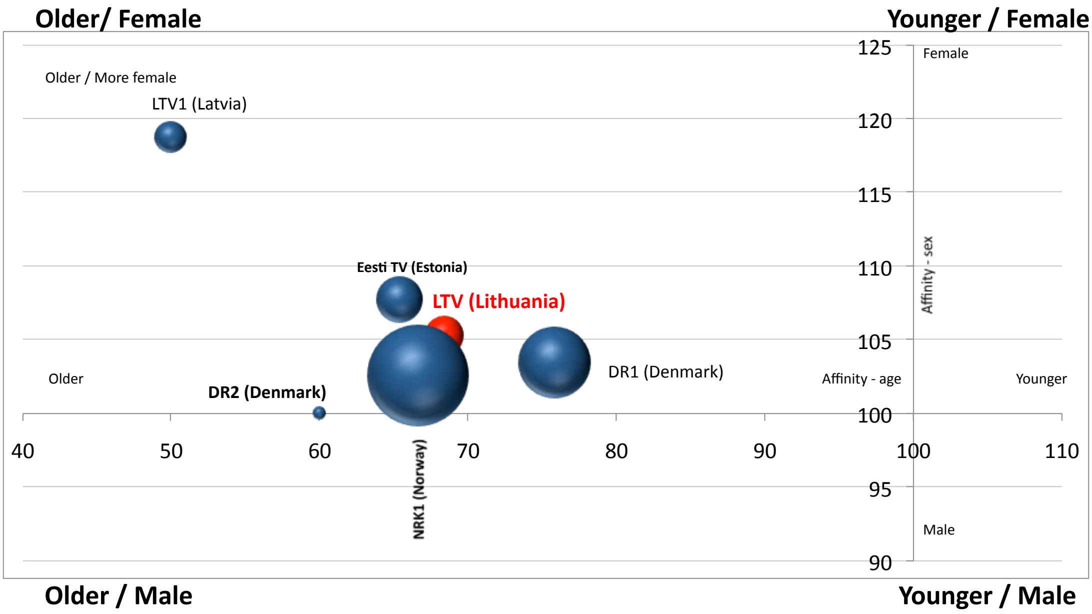
CHART 2.7.3
BALTIC COUNTRIES - AUDIENCE PROFILES
PUBLIC BROADCASTERS
(SOV in target groups, average for 2005-2009)



Source: TV Meter surveys. Primary channels of public broadcasters.

I also mapped all primary and bigger secondary channels of state broadcasters on the using age and sex affinity indexes. Size of the channels is intentionally omitted in order to see the pattern of positioning public broadcaster channels. The result is presented in chart 2.7.4

CHART 2.7.4
MAPPING OF PUBLIC BROADCASTERS
(age and sex affinity indexes, average for 2005-2009)



Nr.	Country	Channel	Affiniy AGE	Affinity SEX	SOV (4+) x10
1	DK	DR1	**76**	103	25.4
2	LT	LTV	**68**	105	13.5
3	NO	NRK 1	**67**	103	35.9
4	EE	Eesti TV	**65**	108	16.4
5	DK	DR2	**60**	100	4.5
6	LV	LTV1	**50**	119	11.2

Source: TNS surveys

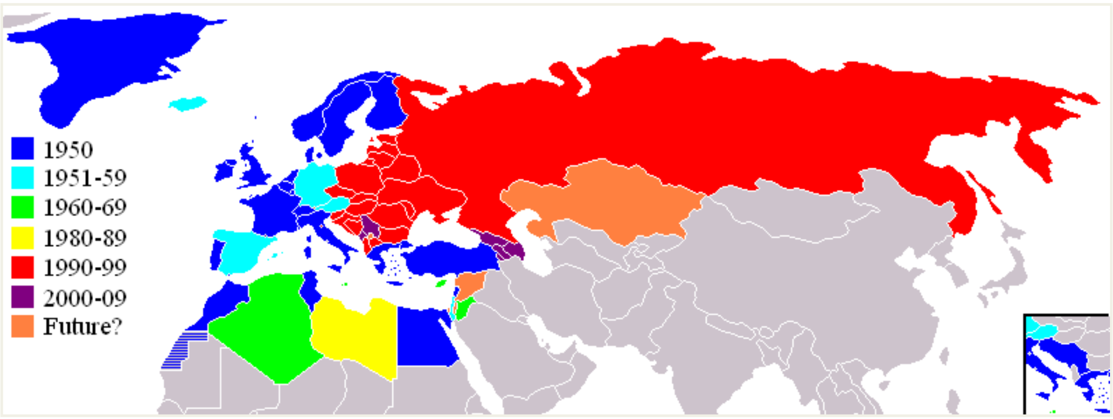
This mapping gives 4 basic combinations of age and sex. We can clearly see that most of the public broadcaster channels are viewed by quite similar audiences – older skewed and more female. The most older and female skewed is Latvian public broadcaster.

International organizations uniting public broadcasters and their impact on audiences.

Though the origin of "promotion of public service values" is deriving from within each nation state, and such focus by definition is strongly oriented to be focused on the matters taking place within each nation state, there is international cooperation between public broadcasters as well. In fact – such cooperation is guaranteeing members of international public broadcaster organizations access to valuable international content which is often off limits for the commercial broadcasters. Good examples are Olympic games and FIFA World cup, which are traditionally carried by public broadcasters. In the area of entertainment, probably the best example of such international cooperation is Eurovision song contest.

The main organization for European public broadcasters is EBU (European Broadcasting Union). The organization is a confederation of 75 organizations from 56 countries. It also includes 43 associated members from another 25 countries. This organization unites both television and radio companies, most of which are publically owned (some members are privately owned, but with public service missions). Active members of EBU are those, whose states fall within the European broadcasting area.

CHART 2.7.5
MAP OF EBU EXPANSION BY YEARS



EBU was founded back in 1950s. The headquarters of the organization are located in Geneva, with some 300 permanent employees. Organization also has its offices in Beijing, Brussels, London, Madrid, Moscow, Singapore and Washington. The combined weekly reach of EBU member stations is about 650 million people.

There are three main functions of EBU:

1. Promoting public service values

EBU represents its Members on European Union audiovisual policy matters, ensuring that public service values are well understood and taken into account by decision and policy makers.

2. Technological development

In 1950 Europe's public service broadcasters embarked on an adventure - decided to invest in the future, in a new technology – television. A fragile infrastructure was used to bring pictures to audiences all over Europe. Today EBU continues to play important role in the area of development – the organization is at the forefront of research and development of new media. It has worked to help develop many new radio and TV systems: radio data system (RDS), digital audio broadcasting (DAB), digital video broadcasting (DVB), high-definition TV (HDTV). Organization studies digital technology for production and transmission and advises members on appropriate solutions.

3. Cooperation on acquiring and developing content

The Eurovision and Euroradio networks, operated by the EBU, carry daily exchanges of programs, music, sports events and news between Members, and other media players. Much of the foreign news featured on national news bulletins has passed through the control centre in Geneva. The EBU helps its members to access high quality programming for radio and television, and works with them to develop content for new platforms. EBU also runs the Eurovision Song Contest, and its website. The EBU acquires sports rights on behalf of its Members, including the Olympic games, the Football World Cup and the World Championships in Athletics.

The importance of such cooperation for public broadcasters can be easily illustrated by table 2.7.6 – where 20 top rating programs on the main channel of public broadcaster are presented. The list covers years 2005-2009 and projects which are produced / secured with the help of EBU are marked in separate column. In this particular case first 7 out of 15 positions are held exclusively by such projects as Eurovision and Olympics. Overall there are only 6 projects out of 20 on this list, which are not related to EBU.

TABLE 2.7.6
LITHUANIA: PUBLIC BROADCASTER
15 TOP RATING PROGRAMES 2005-2009
(main statistic: average rating in target group 4+)

Nr.	TITLE	EBU projects	Year	Target group: All 4+ TRP	Share	Audience '000	Target group: All15-54 TRP	Share	Affinity 15-54 vs 4+
1	51st Eurovision Song Contest. Final	EBU	2006	**24.8**	75.9	829	27.0	78.5	109
2	54th Eurovision Song Contest. Final	EBU	2009	**23.9**	72.0	776	25.9	72.6	108
3	51st Eurovision Song Contest. Semifinal	EBU	2006	**23.0**	74.6	770	24.8	75.7	108
4	54th Eurovision Song Contest. 2nd Semifinal	EBU	2009	**20.5**	58.9	666	20.5	58.2	100
5	52nd Eurovision Song Contest. Final	EBU	2007	**18.3**	49.2	613	19.5	50.2	107
6	Eurovision Song Contest. National Tour. Final	EBU	2006	**18.1**	43.3	604	17.3	45.1	96
7	Olympic Games 2008. Basketball. Semifinal/Lithuania - Spain	EBU	2008	**17.8**	68.7	596	15.8	73.8	89
8	Gert Hoff's Show of Lights		2008	**17.7**	44.9	593	13.9	38.2	79
9	50th Eurovision Song Contest. Semifinal	EBU	2005	**17.6**	57.3	590	19.1	57.5	109
10	Lithuanian Dancing TOP10. Final		2006	**16.3**	33.8	546	13.4	29.1	82
11	Funeral Ceremony of Pope John Paul II		2005	**16.2**	57.7	540	10.3	49.1	64
12	53rd Eurovision Song Contest. 2nd Semifinal	EBU	2008	**15.9**	57.2	531	16.6	56.9	104
13	ULEB Cuo. Final/Lietuvos Rytas - Makedonikos		2005	**15.7**	39.5	525	17.3	42.6	110
14	Why a protest meeting became a riot?		2009	**15.7**	33.7	508	9.5	23.2	61
15	Olympic Games 2006. Dancing on Ice. Original Program	EBU	2006	**14.9**	36.3	498	12.3	31.2	83
16	Olympic Games 2006. Dancing on Ice. Free Program	EBU	2006	**14.8**	40.8	496	13.3	37.2	90
17	Eurovision Song Contest. National Tour. Final	EBU	2005	**14.8**	33.6	495	13.7	31.6	93
18	In Memoriam Janina Misciukaite		2008	**14.4**	31.2	481	10.7	23.6	74
19	Eurovision Song Contest. National Tour. Final	EBU	2008	**14.0**	35.8	469	12.2	30.8	87
20	50th Eurovision Song Contest. Final	EBU	2005	**13.4**	58.0	447	14.0	57.7	104

Source: TV Meter surveys.

Additional benefits of being members of EBU for public broadcasters can be seen from the performance of key programs – Eurovision, Olympics and FIFA world cup compared to overall channel averages. In case of state broadcaster in Lithuania the average affinity index between 15-49 target group and 4+ target group in the period of 2005-2009 was 68.4. As it is seen in the last column of the table 2.7.6 - most of the EBU related projects also have much higher affinity indexes than channel averages. I.e. such projects have two-fold impact on public broadcaster:

1. High profile programs obtained via EBU are attracting much higher viewer attention than channel averages.
2. Such programs broaden the spectrum of viewers attracting younger as well as more economically active audiences.

Public broadcaster: financing models

In addition to public service values and public ownership – there is another key difference of public broadcasters from the rest – financing model. Since the mission of public service broadcaster is not focused on maximizing commercial gains, which is the case for commercial broadcasters, it has to receive additional financing from the state or from the viewers. Most of the countries in Europe today already have clear fees paid by the viewers to finance their public broadcasters. This model can mean that public broadcaster is not allowed to carry advertising or it can be a combination of license fee and advertising (which in most cases has more restrictions and limitations).

The list of European countries and the fees paid for public broadcaster as well as the share of viewing that public broadcasters have in each country is shown in table 2.7.7.

TABLE 2.7.7
TELEVISION FEES (EUR) & SOV OF PUBLIC BROADCASTERS IN 2008

Nr.	Country	TV FEE EUR / YEAR	SOV of public broadcasters		Nr.	Country	TV FEE EUR / YEAR	SOV of public broadcasters
1	Denmark	298	60.9		18	Poland	45	40.3
2	Austria	290	41.9		19	Slovakia	40	22.7
3	Norway	284	35.8		20	Romania	12	5.4
4	Finland	224			21	Belarus	0	60.1
5	Germany	216	31.9		22	Croatia	0	49.1
6	Switzerland	197	32.2		23	Russia	0	48.2
7	Iceland	194	47.8		24	Spain	0	36.7
8	Sweden	187	30.9		25	Netherlands	0	35.7
9	Ireland	160	40.1		26	Portugal	0	30.2
10	United Kingdom	146	39.2		27	Cyprus	0	22.1
11	Slovenia	132	32.2		28	Estonia	0	16.5
12	France	116	20.4		29	Hungary	0	16.5
13	Italy	106	42.8		30	Latvia	0	16.3
14	Czech Republic	60	28.8		31	Bulgaria	0	14.1
15	Macedonia	60	9.6		32	Lithuania	0	14.1
16	Serbia	51	37.3		33	Turkey	0	3.5
17	Greece	51	17.4		34	Ukraine	0	2.2

Source: IP. R= 0.44 (among all) and R=0.64 (among countries with the fee).

There is only a very weak correlation (and there hardly should be) between the amount paid for public television and share of viewing that public television gains. In other words – the payment is for the mission, which is not benchmarked in a commercial way, where higher investment should mean higher viewing. In the case of public broadcaster fees are not necessary translated into popularity, which can be measured by higher viewing shares. The exceptional case is Denmark, where the strong position of public broadcasting is unique in Europe and comes first of all from legislative (licensing) setup.

CONCLUSIONS

General trends

Media and television should be treated as integral part of the rise and development of modern societies. The types of media available to society have bigger impact on the social organization compared to the content itself delivered by the media. Television has shifted the communication towards predominantly monologic and 'present minded' form, but still remains an integral and important part of a public sphere which now includes more things than in the past. Television is one of the core agents in society exercising symbolic power. The role that television plays in daily lives means that it is moving from simply showing the world we live in more towards defining it.

Television has emerged in the context of national state and was originally aimed at communicating to it's own population and restricted from crossing the borders of national state. At the moment the two core processes affecting television are globalization and audience fragmentation. Television is one of the key agents of creating a "global village" through both direct import of international products and through localization of internationally successful ideas / formats. The process of globalization has both positive and negative effects. Promoting consumerism and spread of cultural imperialism can be identified as the core negative impacts of the globalization process.

Audiences should be treated as active recipients of messages delivered through television. The message is filtered through different cultural, national and social contexts and value systems and therefore is interpreted in different ways. Because of these reasons, despite strong globalization processes television still remains first of all a national phenomenon.

Due to fast technological developments and emergence of new platforms, audiences are increasingly finding themselves in the environment where the presence of media is more and more intense. The impact of new forms of media on television should be looked at as supplementing each other instead of replacing – i.e. an average person has more new places and new ways in which he is exposed to media, but that does not necessary result in giving up old patterns of media (television) consumption.

Contrary to Internet, which 'runs on love', where the core principle of creating content is a donation of small amount of time and energy by a very broad audiences, television 'runs on commerce' and proper understanding and analysis of this media can not ignore the economic and organizational principles behind the content.

Identified types of television stations

At the beginning of empirical analysis, based on the licensing, ownership structure, penetration and place of origin four key types of television stations were identified. These four segments are different in their core goals and types of audiences they are aiming to attract.

1. National commercial broadcasters – focused on translating popularity into advertising revenue and maximizing commercial profits.
2. Public broadcasters – focused on serving public mission.
3. Local (and localized) regional and niche TV stations – similar as national commercial broadcasters, but more specialized in terms of content and smaller in terms of maximum audience they can reach and audience size they get.
4. Cable and satellite channels – most often originating outside of national state and provide more choices and alternatives in exchange for cable / satellite fees from the viewers.

Analysis showed that in the Baltic region, segment 1 builds relationship with the biggest part of general population – Lithuanian and Baltic television is predominantly commercial.

Analysis of a broader European landscape, focused on the balance between these core types of television stations, showed 8 different ways in which the television media landscape can be arranged on the scales of commercial-public-alternative content preferences. Lithuania fell into the same cluster with the other two Baltic neighbors. Western television models in general show stronger roles that public broadcaster plays compared to the situation in the Baltics.

MODELS OF INTERACTION BETWEEN AUDIENCES AND TELEVISION

Conclusions:

A) Within a single state, based on differences and orientation towards intellectual-mainstream and alternative seeking axis 9 different clusters was identified and quantified.

B) Scandinavian television is more "cool" / "engaging" media compared to the Baltics where it also has "hotter" / more wallpaper function during daytime.

In order to establish, quantify and analyze the structural composition of typical models in which audiences relate to television analysis on the level of individuals was performed using Lithuania as a model country. A ser of 3 key parameter categories was used – overall viewing intensity (how important role television plays in daily routines), individual preference towards key channel groups (commercial, public and niche) and individual content preferences. As a result of cluster analysis nine different types of relationship models that can be established between audiences and television within individual country were identified. For the interpretation purposes they were further grouped into 4 blocks – “intellectual”, “mainstream”, “transition” and “alternative”. The core variables for establishing the models were related to the behavior, relation of people to television and the choices they make. However clusters are also different from each other in their demographic composition with “intellectual” being more applicable to Lithuanians with high education, higher income and higher social class. On the opposite end - “alternative identity” has non-Lithuanians as the key difference point – people who are seeking the broad spectrum of information and entertainment, but are more likely to choose it from foreign (Russian) channels due to their national identity. “Transition” clusters are different from the rest in terms of younger age structure; more narrow content preferences and their behavior in the future can be shifting more towards mainstream or alternative edges. Within the mainstream category the differences are in content preferences, but clusters itself are rather homogenous in terms of gender and ethnic composition as well as C2 as a dominant social class.

THE ROLE OF PUBLIC BROADCASTER

Conclusion: Setting of broadcast rules and running a public broadcaster are 2 key tools that a state has in its possession when it comes to shaping media landscape in individual country. There is a general European trend that more developed countries also have a stronger public broadcasting function, while in less developed European countries television is more skewed towards commercial axis. A number of countries from former soviet block are an exception where a state is considering television a strong tool for opinion making and keeps higher presence on television landscape through public broadcaster.

Further analysis of public broadcaster showed a correlation between the economic development of a country and the importance of public broadcaster - the more economically developed country is, the stronger and more watched is public broadcaster. This statement is applicable to most of the European countries, however two outlier groups were identified – 4 countries from the former Eastern block (Russia, Poland, Serbia and Croatia) – where public broadcaster is much stronger compared to the countries with similar economic development, and 2 countries with high economic development – Norway and

Switzerland, where the position of public broadcaster does not follow a general pattern. The first outlier in my mind is best explained by historical focus of Russia on information control. The second one – by deviation of these two countries from the rest of Europe in terms of economic development (most affluent ones).

Further analysis also showed positive impact of globalization and public broadcaster integration into international organizations. The performance of shows and events which are produced by public broadcasters in the framework of international cooperation shows positive impact on both making public broadcaster more popular overall and attracting younger audiences.

The analysis of public broadcaster and relation to key demographic groups in different countries showed the general pattern that older audiences with more focus on information find public broadcasters most attractive in all countries.

INFLUENCE GROUPS AND CONTENT PREFERENCES

Conclusion: "Television plays different social and economic role in different countries. The role is more important in developing countries than in developed ones. Different models of relationship were identified".

Analysis of general relation of audiences and specific demographic groups to television in different countries established the key "influence groups". Further analysis showed different interaction between the influence groups and 4 core segments of TV stations revealing the trend of younger and more female oriented audiences having closest relationship with national commercial stations, male audiences most actively searching for more choices in the category of alternative, niche channels, while older people being the core audience for public broadcasters in the region.

A correlation was established between the economic development of a country and the importance that television plays in daily routine. It is more important in less economically developed countries compared to the more developed ones. This is expressed both as the social aspect – in terms of viewing intensity, and as economic – as a share of total advertising market that is taken by television.

The analysis of key content categories showed how different demographic groups are selecting different content and differentiate from each other. A set of core 10 content categories was identified that corresponds to 75% television viewing on the main national channels. News emerged as the most popular individual category with close to 22% of viewing attributed to this category. Differences in content choices revealed key differences between older and younger audiences, men and women, social class membership, urbanization and TV reception options.

GLOBALIZATION OF CONTENT / CULTURAL IMPERIALISM

Conclusion: Though audience fragmentation trend is a fast and clearly visible process in all countries, increasingly creating "global village", niche cable and satellite channels should not be considered as the only or even the main agents of Television globalization. The raise of the format and power of local national commercial stations increasingly following global trends has much higher potential of delivering global concepts and ideas to national audiences utilizing more culturally appropriate contexts.

The comparison of content offer compared to the actual viewing behavior, measured the differences of choices between international and local content. Most of the available content on television is international (as the total amount of hours), but most of the content that people actually watch is local. This proves that television is also national and local in its essence. The further analysis of the key international formats in Lithuania showed that globalization of television has taken a new shape – though people are interacting to higher extent with “local” content compared to international, in fact many of the most popular shows are international formats adapted for local market. This is emerging as the most powerful tool of television globalization due to its social relevance to specific country and the impact it has on the audience preferences.

The public sphere

Looking at television and the public sphere analysis of main news broadcasts in individual countries and analysis of relation between audiences and specific genre categories shows that information remains one of the leading individual genres on television and proves the expectation of the viewers to be not just informed, but also entertained.

Individual newscast analysis proved that the most popular information program in each country is always on the most popular TV station. It also showed that even though one of the core missions of the public broadcasters is information, general audiences receive the main part of the news from the commercial stations.

The popularity of news was also benchmarked to the overall popularity of TV station that carries them and shows that news are always attracting higher audiences than channel average which means that news broadcasts in these countries are fundamental points in building schedules and positioning other programs around them to maximize audience buildup and retention.

"Television - secret exposing machine"

Analysis focused on the relationship of children and television revealed the importance of animation compared to other genres. A deeper analysis of animation as a category and its relationship with children audiences led to the case example of Simpsons (which emerged as the most important series in Lithuania over the last 10 years) and their function in bringing adult and broader society related issues to children using a popular form of animation. The examples of "Sex and the city" and " Brokeback Mountain" showed how products like these relate to audiences in Lithuania and perform as agents of communicating global ideas of gender equality and reducing homophobia in local social context.

AUDIENCE FRAGMENTATION AND INTERACTION BETWEEN MEDIA TYPES

Conclusion: despite the rise of Internet, the overall exposure of average person to TV did not decrease. Television and Internet are generally complimenting each other instead of replacing, however there are rapid audience fragmentation processes taking place within television category.

The analysis of general viewing patterns in individual countries over the period of last decade shows twofold results:

- general television viewing is rather stable – people continue to spend similar amounts of time watching television as before despite the rise of Internet.
- there is a shift between the audiences from segment 1 (national commercial broadcasters) towards segments 3 and 4 (local and international niche and alternative stations).

The shift is affecting all demographic groups, but is different in its rate. Probably the most problematic age group is teenagers and young adults tend to watch less TV and can be said to represent "new trend" of relation to media. However in the analyzed region they tend to revert to more "traditional" media model with increasing significance of television, after reaching the age of 30 and creating their own families.

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APPENDIXES

Appendix 1 – list of individual channels belonging to each of the 4 TV segments by country.

Country	Segment 1	Segment 2	Segment 3	Segment 4
	National commercial	Public	Local niche	
LITHUANIA	LNK, TV3, BTV	LTV, LTV2	11K, TV6, PBK, Lietuvos Rytas TV, TV1	All other
LATVIA	TV3, LNT	LTV, LTV7	PBK, TV5 Riga, 3+, Rent TV Baltic, TV6 , PBMK	All other
ESTONIA	Kanal 2, TV3, TV1	Eesti TV, ETV2	3+, Kanal 11, PBK, RTR, NTV Mir, Ren TV, TV6	All other

APPENDIX 2

LITHUANIA 2009 - SOV DISTRIBUTION BY GENRE AND RESIDENCE, TV RECEPTION AND SOCIAL CLASS VARIABLES

		SOV in % by genres									INDEXES vs ALL 4+							
	GENRE	All 4+	Urban 4+	Rural 4+	Terrestrial reception	Multichannel reception	Social Class=A-B	Social Class=C1	Social Class=C2	Social Class=D-E	Urban 4+	Rural 4+	Terrestrial reception	Multichannel reception	Social Class=A-B	Social Class=C1	Social Class=C2	Social Class=D-E
ORIGINAL SHOWS	**News**	**21.8**	**22.7**	**20.2**	**19.8**	**23.8**	**22.3**	**24.2**	**20.1**	**23.8**	104	93	91	109	102	111	92	109
	Series	**14.2**	**14.5**	**13.6**	**14.0**	**14.3**	**14.3**	**15.4**	**14.1**	**12.2**	102	96	99	101	101	109	100	86
	Animation	**8.3**	**7.2**	**10.3**	**9.6**	**7.0**	**7.3**	**6.6**	**9.9**	**6.7**	87	123	115	85	87	79	120	81
	Movies	**6.3**	**6.0**	**7.0**	**6.7**	**6.0**	**7.1**	**6.1**	**6.7**	**4.0**	94	110	106	94	113	96	106	63
	Entertainment	**5.1**	**5.3**	**4.8**	**4.6**	**5.6**	**4.9**	**5.5**	**5.2**	**4.9**	103	94	90	110	95	107	101	95
	Soap opera	**4.8**	**4.3**	**5.7**	**5.9**	**3.6**	**4.0**	**3.4**	**5.0**	**7.0**	90	119	123	76	84	72	105	147
	Humour	**4.5**	**4.2**	**4.9**	**4.7**	**4.3**	**4.3**	**4.4**	**4.6**	**4.4**	95	109	105	95	95	98	103	98
	TV Magazines	**3.7**	**3.6**	**3.8**	**3.9**	**3.4**	**3.8**	**3.7**	**3.4**	**4.2**	98	103	106	94	104	102	93	115
	Talk Shows	**3.4**	**3.9**	**2.7**	**2.7**	**4.1**	**3.1**	**4.5**	**3.0**	**3.7**	112	78	79	121	90	132	89	108
	Lotteries	**3.1**	**2.9**	**3.5**	**3.4**	**2.8**	**2.8**	**2.8**	**2.9**	**4.9**	94	111	110	90	89	90	93	157
	Music programs	2.71	2.71	2.71	2.84	2.58	2.83	2.58	2.55	3.28	100	100	105	95	104	95	94	121
	Specialized	2.37	2.35	2.41	2.51	2.23	2.51	2.25	2.36	2.36	99	102	106	94	106	95	100	99
	Publicistic	2.29	2.30	2.29	2.34	2.25	2.27	2.50	2.09	2.77	100	100	102	98	99	109	91	121
	Documentary	1.59	1.75	1.30	1.36	1.82	1.43	1.96	1.52	1.56	110	82	86	114	90	123	95	98
	Reality shows	1.30	1.28	1.32	1.26	1.33	1.38	1.16	1.37	1.11	99	102	97	103	106	89	106	85
	Info Shows	1.16	1.04	1.39	1.23	1.10	1.45	0.90	1.09	1.38	89	119	106	94	124	78	93	119
	Info-Analytic	1.10	1.14	1.04	1.09	1.12	1.24	1.24	0.95	1.22	103	94	99	101	113	113	86	111
	TV Game	0.99	0.94	1.09	1.06	0.93	0.97	0.83	1.05	1.07	95	110	106	94	98	83	106	108
	Sports	0.79	0.84	0.68	0.59	0.99	0.92	0.89	0.76	0.49	107	87	75	125	118	114	97	63
	Morning Shows	0.60	0.72	0.37	0.42	0.77	0.66	0.66	0.54	0.63	121	62	70	130	110	110	90	105
	Quiz Shows	0.29	0.32	0.23	0.23	0.36	0.27	0.35	0.28	0.27	111	80	78	122	94	122	96	92
	Sport reviews	0.22	0.23	0.21	0.19	0.25	0.27	0.23	0.23	0.11	104	94	87	113	124	104	101	52
	Advertising quiz	0.16	0.18	0.12	0.10	0.21	0.14	0.22	0.15	0.14	112	79	66	134	87	140	93	88
	Criminal	0.13	0.16	0.08	0.06	0.19	0.08	0.19	0.12	0.14	122	61	50	151	64	151	93	108
	Children program	0.12	0.13	0.09	0.11	0.12	0.12	0.13	0.12	0.07	111	81	94	106	103	111	105	59
	Cognitive prpgrams	0.04	0.04	0.04	0.04	0.04	0.05	0.05	0.04	0.04	107	87	100	100	108	118	91	94
	TV play	0.03	0.03	0.04	0.04	0.02	0.03	0.03	0.03	0.02	87	123	117	83	96	96	109	79
	Education	0.02	0.02	0.02	0.02	0.02	0.02	0.02	0.02	0.02	102	95	97	103	114	110	90	99
	TOTAL original shows:	**91.1**	**90.8**	**91.7**	**90.8**	**91.4**	**90.5**	**92.8**	**90.3**	**92.5**	**100**	101	100	100	99	102	99	102
REPEATS	Series Rep	1.70	1.89	1.37	1.75	1.65	1.89	1.33	1.86	1.38	111	81	103	97	111	78	109	81
	Entertainment Rep	1.35	1.45	1.19	1.36	1.35	1.52	1.13	1.47	1.01	107	88	100	100	112	83	109	74
	Animation Rep	1.05	0.94	1.25	1.20	0.90	0.94	0.73	1.26	0.93	89	119	114	86	89	70	120	89
	Tv Magazine Rep	0.74	0.80	0.62	0.72	0.75	0.83	0.65	0.75	0.67	109	84	98	102	113	88	102	91
	Humour Rep	0.62	0.61	0.64	0.69	0.55	0.65	0.53	0.66	0.59	98	103	112	88	105	85	106	94
	Talk Show Rep	0.61	0.64	0.54	0.64	0.57	0.65	0.41	0.68	0.57	106	89	105	95	107	68	112	94
	Music programs Rep	0.52	0.55	0.47	0.55	0.50	0.57	0.45	0.54	0.50	105	91	104	96	109	85	104	95
	Specialized Rep	0.52	0.53	0.50	0.49	0.55	0.61	0.51	0.52	0.39	103	95	95	106	117	98	100	76
	Documentary Rep	0.43	0.45	0.38	0.41	0.44	0.46	0.40	0.43	0.41	106	90	97	103	107	94	101	95
	Reality Show Rep	0.36	0.35	0.38	0.37	0.35	0.36	0.27	0.43	0.24	97	105	103	97	100	75	119	68
	Movie Rep	0.34	0.33	0.35	0.38	0.29	0.36	0.23	0.39	0.26	98	104	113	87	107	69	116	76
	Publicistic Rep	0.26	0.29	0.20	0.24	0.28	0.27	0.23	0.27	0.26	113	78	92	108	105	87	103	99
	Tv Game Rep	0.11	0.12	0.10	0.11	0.11	0.12	0.08	0.12	0.10	105	90	100	100	107	75	109	93
	Sport Rep	0.09	0.09	0.09	0.09	0.08	0.09	0.06	0.10	0.05	100	100	105	95	107	72	120	60
	Soap Opera Rep	0.05	0.03	0.09	0.06	0.05	0.03	0.02	0.08	0.05	64	164	108	92	53	34	151	89
	Other repeats	0.15	0.17	0.12	0.13	0.17	0.19	0.16	0.13	0.12	113	77	87	113	128	109	90	79
	TOTAL Repeats:	**8.9**	**9.2**	**8.3**	**9.2**	**8.6**	**9.5**	**7.2**	**9.7**	**7.5**	104	93	103	97	107	81	109	85

Source: TV Meter surveys

APPENDIX 3
GDP PER CAPITA VS SOV OF PUBLIC BROADCASTER
(in EUR and %)

Nr.	Country	GDP / capita (EUR)	SPV of Public broadcaster	TV FEE EUR / YEAR	Group
1	Ukraine	2,777	2.2		1
2	Bulgaria	4,466	14.1		1
3	Latvia	5,066	16.3		1
4	Romania	5,804	5.4	12	1
5	Macedonia	8,524	9.6	60	1
6	Lithuania	9,662	14.1		1
7	Hungary	9,894	16.5		1
8	Estonia	11,833	16.5		1
9	Slovakia	12,466	22.7	40	1
10	Czech Republic	13,173	28.8	60	1
11	Portugal	15,646	30.2		1
12	Slovenia	18,196	32.2	132	1
13	Greece	21,665	17.4	51	1
14	Cyprus	23,100	22.1		1
15	Spain	23,726	36.7		1
16	United Kingdom	24,882	39.2	146	1
17	Italy	27,625	42.8	106	1
18	France	30,286	20.4	116	1
19	Germany	30,343	31.9	216	1
20	Belgium	30,990			1
21	Sweden	31,509	30.9	187	1
22	Austria	33,820	41.9	290	1
23	Netherlands	36,214	35.7		1
24	Ireland	42,196	40.1	160	1
25	Denmark	42,515	60.9	298	1
26	Serbia	2,577	37.3	51	2
27	Russia	6,737	48.2		2
28	Poland	8,000	40.3	45	2
29	Croatia	10,637	49.1		2
30	Norway	64,964	35.8	284	3
31	Switzerland	70,080	32.2	197	3
	R total:	**0.43**			
	R within group 1:	**0.84**			

Data source: IP