

LOSING THE PICTURE

THE FUTURE FOR TELEVISION'S COVERAGE OF GLOBAL ISSUES

Edited by James Firebrace

with Preface by David Bellamy

**A Report from the Third World and Environment Broadcasting
Project**

1990

Published January 1990

© Third World and Environment Broadcasting in the 1990s Project 1989

- Problems
- clips
evidence + quote
- ① role of TV?
 - ② Power spread of TV.
 - ③ Audience using TV?
 - ④ cultural/historical context.
 - ⑤ Unfragmented audience below.
 - ⑥ market fragmented.
 - ⑦ Threat of state regulation.
 - ⑧ Advertising power.
 - ⑨ fulfilled politician?
 - ⑩ useful broadcast quota.
 - ⑪ TV does env awareness.
 - ⑫ The end now?
 - ⑬ Evidence for TV-based environmentalism?

- (13) Dizella Jr.
- (14) Noddy
- (17) Paddy on BBC News.
- (18) TV impact.
- (19) TV influence.
- (20) TV ...
- (267) Date of JWE programming.
- (30) cf 'Alternative Channel'.
- (33) AE?
- (37) Significance of British under 30s.
- (39) Importance of ...

- (39-40) anti-channel variety.
 - (43) Resemblance of viewing behavior.
 - (44) How do ...
 - (45) Runs the thesis of the report.
 - (45) How populist is popular TV.
 - (47) US-UK difference.
 - (47) TV cannot target audience socially.
 - (47) Advertising market.
 - (48) Two different markets.
 - (48) How does Comic Relief feature / fare in the divided market?
 - (48) Archive is sold to advertisers.
 - (57) Spectrum reach its solution.
- Britain has long had imperial interests overseas - desire to conquer, make, colonise. Now hindered in the absence of TV. What interests does TV. feed? WHAT KIND OF AUDIENCES DOES WORTHY IN CREATE?

Photo credits

- (59) ...
- (61) Cable etc rely on subscription.

Front Cover

- (65) Celeb journalism crisis at a rating war.

- * Baked Earth (Ethiopia): Jon Bennett/'The Unofficial Famine', Yorkshire TV 1984
- * Dropping logs into River (Sumatra): Alain Compost/ICCE
- * Cattle Injection (Sudan): Jon Bennett/'Voices of Sorrow', Yorkshire TV 1984
- * Refugee Camp (Ethiopia): 'Seeds of Despair', Central TV 1987
- * Factory Worker (Philippines): OXFAM
- * Woman carrying roofing material, Cape Town.

Back Cover

- * Acid Rain (N. Europe): 'Earth', Thames TV 1987
- * Tiger (India): B. Kapadia/WWF
- * Carrying Water (Cambodia): 'Cambodia Year 10', Viewpoint '89
- * Woman with Grain (Ethiopia): 'Seeds of Hope', Central TV 1987
- * Armed Group (Ethiopia): Jon Bennett
- * Woman With Sick Child (Cambodia): 'Cambodia Year 10', Viewpoint '89.

Cover design by Kee Scott Associates

Printed by OXFAM Print Unit

- (19) What is excellent? in this regard?
- (70) Political blindness keeps the audience short. How? Why?
- (71) Not the mention of celebrity in an issue devoted to concern about Africa's jolly appearance.

① Audience are ...
 ② Audience ...
 ③ Advertisers only want large audience.
 ④ Schedules only want to put on programme which could be popular. - since on clearly minority interest.
 ⑤ ...
 But what can happen to viewing figures, if wall to wall light entertainment?

The Third World and Environment Broadcasting Project was first proposed at a meeting called by the Voluntary Agencies in February 1989 to discuss a common response to the Government White Paper on Broadcasting. There was consensus that these plans represented a major threat to the coverage of international issues on television and radio, and would lead to a British public poorly informed on vital issues that affect the future of the planet. The project is funded by the voluntary agencies and has now secured the backing of 50 national agencies:

ActionAid
Acord
Anti-Slavery Society
Band Aid
British Refugee Council
CAFOD
Catholic Institute for International Relations
Centre for Multi-Cultural Education
Centre for World Development Education
Christian Aid
Commonwealth Secretariat
Cooperation and Development
Council for Education on World Citizenship
Comic Relief
Earthscan
Friends of the Earth
Greenpeace
Help the Aged
Intermediate Technology
International Broadcasting Trust
International Institute for Environment and Development
Methodist Relief and Development Fund
Minority Rights Group
National Association of Development Education Centres
One World Action
One World Broadcasting Trust
Overseas Development Institute
OXFAM
Panos Institute
Population Concern
Quaker Peace and Service
Relief and Development Institute
Royal Anthropological Institute
Save the Children Fund
Scottish Catholic International Aid Fund
Scottish Education and Action for Development
Skillshare Africa
SOS Sahel
Survival International
Tear Fund
Television Trust for the Environment
Third World First
Twin
United Nations Association
Voluntary Service Overseas
War on Want
Water Aid
World Development Movement
World University Service
Worldwide Fund for Nature (WWF)

Agencies in bold are represented on the Project Board of Management:

For further information on the Project, please write to: Third World and Environment Broadcasting Project, c/o IBT, 2 Ferdinand Place, London NW1 8EE

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This report has developed like the proverbial rolling snowball. As we delved deeper and looked to examples from further afield, more and more evidence in support of our thesis came to light and its inclusion seemed important. Indeed, evidence is still coming in as we go to press.

Financially the report was made possible by the contributions of nine voluntary agencies and by generous donations from concerned members of the public.

The various contributors need special thanks. They were continually asked to meet near-impossible deadlines and to fax through additions when further details on particular areas were needed.

Jane Hardstaff and Rebecca Cowing spent many heroic hours in the IBA library chasing the data for Chapter 2, and Jane continued by invaluable sorting out the production side. Caroline Duggan and Susannah Duval Smith confronted the international faxes and semi-illegible drafts to produce the final text on floppy disk.

Simon Collings of OXFAM, among his many contributions, put his desk-top skills to good use to take the report to its final published form. Simon Dyer generously donated his time in designing the cover.

Profuse thanks also to all those who, in other ways, have supported this report and helped it come to fruition, but for whom space does not allow a mention.

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Much of the current awareness of environment issues has been due to television and particular programmes have been responsible for major changes in governmental and inter-governmental policy. Television has recently raised awareness and understanding of Third World issues in an unprecedented way. Current affairs programmes and documentaries have provided in-depth background to news items on famine and other disasters. Accessible adult education and school programmes are under threat from current legislation even though the government departments of, Health, Education and Employment see mainstream broadcasting as essential for their own work. The provision of back-up materials and the network of community education officers is in need of protection.

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The results of research carried out by the Third World and Environment Broadcasting Project is detailed. Coverage of Third World and environment issues over the last two years is examined. These programmes are found to attract significant audiences, four to six million, when shown at peak time on the popular channels (ITV and BBC1), while Channel 4 and BBC2 are found to carry the most hours. ITV accounts for over a quarter of the overall reach of these programmes. The research also looks at different categories within the overall coverage of third world and environment issues and at the the programmes by their geographical location.

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The IBA system of mandatory documentary slots has led to popular programming across a broad range. The Government's proposals for ITV threatens serious in-depth factual coverage. Network arrangements need to be seriously addressed. The cost of producing programmes on international issues is examined. If budgets are cut, the quality of the programme will suffer. The Government must recognise the cost of producing quality programmes. The highest cash bid could be the worst bid for the viewer.

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Prof. Andrew Ehrenberg

The research findings of the London Business School are summarised. British viewers, across all classes, spend about a third of their viewing time on demanding programmes, and one third watching programmes with ratings of less than five million. The effect of competition for spot advertising revenue is that, against viewers' wishes, programmes with relatively low ratings will be dropped. Two different markets operate. Advertisers are concerned that programmes maximise the number of viewers, while viewers are concerned about programme range and quality. They are not concerned with low ratings. Loosening of controls on range and quality is against the consumer's interest.

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Views on the future television environment in Britain - if deregulation goes ahead - from the different perspectives of the BBC and independent producers. The limitations to the growth of funding income for television as a whole and some of the new possibilities are explored. A squeeze on ITV's documentary programming is predicted. The new media (satellite and cable) will only provide limited possibilities for the coverage of international issues, particularly through programme repeats. New production on these topics in the new media is unlikely. Hodgson argues for the continuation of the 'must carry' rule for the provision of the main terrestrial channels on cable, and for the value-for-money of the licence fee. Styles argues for independent producers to keep the rights to the programmes they make so that they can sell them onto other buyers. He fears for the future of the small independent.

An overview of the situation in Europe, North America and Australia. There has been a rise in the amount of imported material from the United States and a general drop in documentaries, current affairs and educational output. These changes on commercial channels have frequently led public service or state broadcasting channels to follow suit. This has been the case in France, Germany and Italy as the logic of ratings competition has taken effect. In many cases the public service channels' best technicians, producers, and presenters have been poached by the commercial channels. If Britain were to follow the international trend, documentaries, particularly international ones will go into decline.

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In Italy over the last decade the rise of commercial television has radically affected the state-funded channels (RAI) which have had to make heavy cuts in their programme costs. There is now a vast amount of advertising on Italian commercial television and an increase in 'infotainment', where real life situations are presented in spectacular fashion. In France, instabilities have been created by vacillation in television policy. The removal of public service obligations on the main commercial channel TFI has left the public channels, A2 and FR3, which must compete for advertising revenue, inadequately funded and demoralised. The effect of measuring performance purely against the ratings, as is the case in the United States, is described as resulting in "the generation of a polished blandness to keep audience share and profits rolling in". The effect of the recent ownership changes in Australian television is charted. The very high prices paid for companies has left little money for programme production. Cost cutting has become all important and has led to extensive buying in of US material.

Chapter 8: Radio and the Broadcasting Bill
Steven Barnett

Radio coverage has played an important role in adding to people's understanding of international issues. The likely outcome of the current proposals on radio in the Broadcasting Bill and the effect of changing the funding structure of the BBC is examined. BBC radio is dependent on the continuation of the licence fee. Deregulated commercial radio could lead to journalistic input becoming an expensive "luxury". Criteria for quality and range need to be built into the franchise application process.

PREFACE

"When a population becomes distracted by trivia, when a cultural life is redefined as a perpetual round of entertainment, when serious public conversation becomes a form of baby talk, when, in short, a people become an audience and their public business a vaudeville act, then a nation finds itself at risk".

Neil Postman: *Amusing Ourselves to Death*

Britain is already deeply afflicted by the Postman Syndrome, the affect of which can only be exacerbated by certain of the implications of the new Broadcasting Bill.

The fact that causes like prisoners of conscience, famine in Ethiopia, and the whole green movement are now discussed at primary school; likewise the fact that FOE, WWF, OXFAM, Greenpeace, Amnesty International and Save the Children are now household names, amply demonstrates the crucially important role of the media in shaping public concern.

Mass appeal Live Aid, Band Aid and Children in Need epics are of vital importance. But without the continuity of extensive, investigative news coverage and high profile documentary and educational programming - in prime time and on all prime channels - they become but hollow rhetoric and knee-jerk reaction.

It has been of immense importance that the voices of the real world have been heard and the images of the real world have been seen by the whole mass of the population.

As we pass from the decades of destruction, through the image-driven decade of realisation, into the 1990s, the decade of reconstruction, television has an even more important role to play.

Television will, however, be rendered impotent if the predators of advertising and sponsorship are given free rein to sharpen their claws on viewing figures and profit and feed us on an exclusive diet of trivial distraction.

Control of the masses by inflicting pleasure can only lead to a collapse of civilisation as it laughs itself to death. The world is at risk as never before.

David Bellamy
The Conservation Foundation
December 1989

OVERVIEW

*This whole document
deal with NGOs relationship
with TV. - But what role of public
what was the TV production?*

By James Firebrace, Director of the Third World and Environment Broadcasting Project

"The media is one of the strands of our interdependence. It ensures that politics must have a human face."

(Chief Emeka Anyaoku, Commonwealth Deputy Secretary General, December 1989)

Why this report? Broadcasting and the Voluntary Agencies

This publication examines the coverage of international environment and development issues in the broadcasting media - television and radio. It also looks at what could happen to this coverage unless crucial improvements are made to the legislation now making its way through Parliament. The report concentrates on television which is a significantly more important information source for most people than radio; but the final chapter raises some concerns about the future of radio's coverage. Contributions were invited from a range of experts.

The report was commissioned by leading Third World and Environment agencies. Their interest in the issue is clear: central to the objectives of both groups of agencies is increasing public awareness of the issues which the agencies exist to confront. Television is the single most powerful means by which these concerns can be placed before the wider public. Third World and Environment agencies have a specific concern about the way legislative changes may affect opportunities for working with the media.

The Third World and Environment pressure groups play an important role in highlighting international issues because, being on the spot, they are often eye witnesses to important developments. The aid worker and the environmental researcher are often the ones to ring the alarm bell, offer a briefing, provide contacts or give interviews. Voluntary agencies value their relationship with broadcasters, and the two often work closely.

The international voluntary agencies, in common with domestic agencies, also have a more general concern: that the role of television in promoting active citizenship and involvement - whether or not directly linked to agency initiatives - is maintained. Only then can television's contribution to the solution of world problems be fully realised.

Broadcasting is a vital information source on the Third World and the Environment

Much recent discussion of broadcasting has focused on the essential issue of its funding. But the debate has often passed over the more fundamental question: what is broadcasting for, what function does it fulfil?

Broadcasting is not just a medium for entertainment, although this may be its central preoccupation. It is also, for most people, a key information source. This is particularly so for issues with which we are less familiar or for places we have never been to. Television, most powerfully through its images, and radio, through its sounds and accents, can bring alive international issues in a way that the print media cannot. Back-up materials produced for particular programmes enable viewers to pursue their interests further and become actively involved.

The fact that television is the prime source of the British public's knowledge and attitudes about the world cannot be overemphasised. This is confirmed by a number of opinion polls. In the, conducted by Harris in October 1989, 84 percent of British adults gave television as a main source of information about developing countries and their problems. This survey also shows that the dependence on television as an information source on the developing world, is more pronounced among non-professionals (CDE social groupings) who, in practice, have less access to such information through the newspapers they buy.

Schools Television is giving the next generation a basic background in global issues. The vast majority of primary school teachers use Schools Television regularly (74 percent according to a recent BBC/ITVA report). Most secondary school teachers also use Schools Television. 86 percent of programmes are followed up in some way in the classroom. The absence of adequate recording facilities in many schools means it remains essential that programmes are broadcast in school hours.

The importance of a well-informed public

Why is it important that people should be informed on what is happening to our planet, or about the problems of those in remote parts of the world? There are three reasons, each of which stands sufficient on its own.

First, the free flow of information on what is happening both in our own society and in the world as a whole is a prerequisite for democracy, itself a vital ingredient of any solution to global problems.

Second, the security and survival of our planet will depend on the pursuit of policies which recognise the interdependence of nations. Nothing has demonstrated this more strikingly than the global threats posed by the 'greenhouse effect' and the depletion of the ozone layer. At present public awareness of the issues is a precondition for political leaders to respond.

And third, only an aware public is able to respond as active citizens, for example by taking personal steps to reduce pollution and damage to the environment, or by contributing to a Third World agency's efforts to support development or by taking up the cause of prisoners of conscience or other victims of human rights abuse.

The coverage of international issues on television and radio

Broadcasting coverage of international issues takes three forms. Most obviously there are the news and news magazines. Watched or heard by very large audiences - 29 million watch the BBC and ITV evening news bulletins, four million listen to BBC Radio 4's *Today* - these programmes provide the most essential information on world events. But news clips have to be short, often limited to two or three minutes. Longer slots of five to ten minutes, such as given to Michael Buerk's reports from Ethiopia in October 1984, are a rarity.

Voluntary agencies have been critical of the news images of Third World peoples, showing them fighting unexplained wars or facing terrible disasters as destitute, passive people dependent on help from the industrialised North. Some of this may be inevitable as news focuses on the drama of situations and has little time for background explanations.

For the context we must rely on the second type of broadcast coverage - the current affairs programme and documentary. Here there is time to look more closely at the cause and context of events and at their less dramatic but perhaps more significant features. When shown at peak times on the 'popular' channels (BBC1 and ITV), current affairs and documentaries command substantial size audiences of four to ten million.

|| Audience
1984.

In recent years a new type of programming on international issues has been developed - dramas based on real-life situations, such as reconstructions of specific events or portrayals of specific social problems. Channel 4 has been experimenting with such 'docudramas' though largely, as yet, to small audiences.

Factors influencing the new television environment

It is important that a distinction is made between changes that are inevitable, for example as technology develops, and those that are determined by policy decisions such as government legislation or codes to be developed by the new Independent Television Commission (ITC) or Radio Authority (RA).

The most significant inevitable change is the growth of the new media - satellite and local delivery systems such as cable and microwave - although clearly the extent of this growth is still far from clear. Both cable and satellite in this country have made a slow and unsure start. Most commentators believe that total audience viewing time is close to reaching saturation level. The new media will therefore take audience share from the terrestrial broadcasters. Commercial revenue from advertising will be spread more thinly and individual channels will have less financial resources for making programmes.

There!

The Government's legislation plans other far-reaching changes. A new terrestrial television channel, Channel Five, is to be created. The regulations governing ITV (to be renamed Channel Three) are to be lightened. And

changes are to be made to the financial structures of commercial television. There is to be competitive tendering for the Channel Three regional licences, and Channel Four is to sell advertising in competition with other channels.

What do people watch on TV?

Research carried out by the London Business School (see Chapter 4) found that viewers, irrespective of class, age and sex, spend over one third of their viewing time watching factual or 'demanding' programmes (news, current affairs and documentaries). The evidence is corroborated by similar findings from the BBC Research Department summarised in the table below:

Table O.1: Hours of Viewing by Programme Category: Age, Sex and Class

% of time spent viewing	Population 4+	Sex & Class				Age							
		Differences 2%+ from average figures		Differences 2%+ from average figures				Differences 2%+ from average figures					
		M	F	AB	C1	C2	DE	4-15	16-24	25-44	45-64	65+	
%	%	%	%	%	%	%	%	%	%	%	%	%	
Light Entertainment	22	*	*	*	*	*	*	*	*	*	*	*	*
News	16	*	*	*	*	*	*	-4	-3	*	*	*	+3
Films	13	*	*	*	*	*	*	*	+2	*	*	*	-3
Drama-UK	12	*	*	*	*	*	*	*	*	*	*	*	*
Features, Music, Docs	9	*	*	+3	*	*	*	*	*	*	*	+2	*
Sport	8	+2	*	*	*	*	*	-2	*	*	*	*	*
Drama-non UK	7	*	*	*	*	*	*	*	*	*	*	*	*
Childrens	6	*	*	*	*	*	*	+15	*	*	*	-3	-3
Current Affairs	4	*	*	*	*	*	*	-2	-2	*	*	*	*
Religion	1	*	*	*	*	*	*	*	*	*	*	*	*

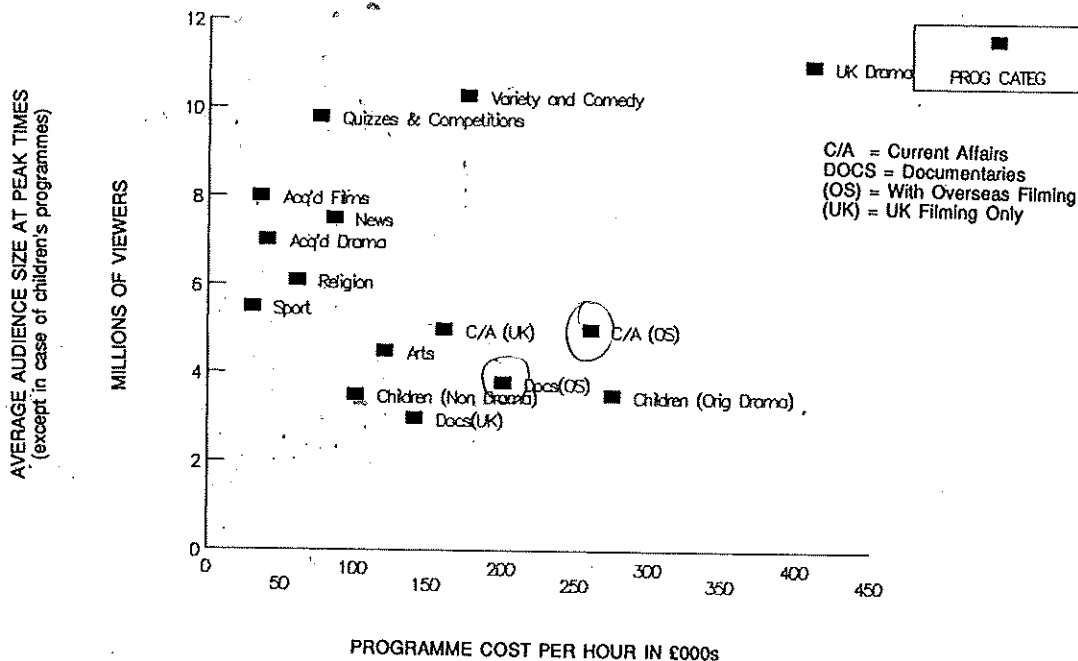
Apal for the viewing habits were identified.

(Source: BBC Research/BARB/AGB w/e 11.10.87)

There are two important conclusions from this. First it is not *paternalist* to wish to preserve informative programming. Viewers choose to spend about a third of their viewing time watching factual programmes and not watching lighter entertainment programmes. Nor is it *elitist*. There is little difference in the viewing profiles across the channels, although ABs do watch slightly more, 3 percent, documentaries than CDEs.

What do programmes cost and how many people watch them?

Table O.2: Programme category : costs against audience size (estimated)



(Source: interviews with BBC, ITV companies, ITVA, IPPA; BARB ratings)

This table shows the production costs of different categories of programmes (based on 1989 costs for primetime BBC/ITV programmes), and the ratings they command at peak time on the popular channels (BBC1 and ITV). It can be seen that the production costs for programmes involving overseas filming, even when overseas film crews can be used, are greater than programmes filmed only in the UK. This is the case because of the extra complexity, research, staff, travel and communications costs.

The effect of deregulation on commercial television

There are currently two key criteria determining the range of different programme types on commercial channels: commercial viability and the existence of 'regulations'. Channel 4's remit to cater for minorities and to encourage innovations, is to be preserved. But the Government is proposing that the IBA quotas, which specify the amount of programming of different types to be scheduled by the ITV companies, be replaced by a 'lighter-touch' regulatory system for C3 (and in due course for C5) franchise applicants. Also, the 'quality hurdle' which applicants have to clear in bidding for a franchise includes only a vague requirement for diverse programming,

"calculated to appeal to a wide variety of tastes and interests", and makes no reference to programme types.

The weakening of regulations shifts the priority of television towards the delivery of audiences to advertisers. It puts at risk programmes which are more costly to produce or which command smaller audiences. In Table 2 above, the cluster of programmes in the lower part of the table and 'UK drama' in the top right, can be seen to be most vulnerable. Third World and environment programmes [see C/A(OS) and DOCS(OS)] face a *double squeeze* - they are relatively expensive to make and are generally watched by only medium-sized audiences.

Advertisers' Preferences

The amount of advertising revenue associated with a programme is determined essentially by the size of its potential viewing audience. Advertisers are interested in the composition of that - by class, age and sex. Much is now being made of the potential for 'targeting' programmes. But research evidence indicates there is, as yet, little scope for this. This may change, for limited audiences, if in a multi-channel future, specific channel profiles, such as for women or young people, can be created.

Two further factors may become more important as the planning of advertisements around programmes becomes more sophisticated. First there is the 'halo effect', where advertisements may have greater impact if placed after a programme that viewers found particularly 'interesting and/or enjoyable'. The Audience Appreciation Index (AI) is a measure of this. Viewers' interests could be served if these figures were published. Advertisers would then be more inclined to back the most appreciated programmes. Current affairs and documentaries have traditionally done well on the AI ratings, and the Project's research findings for Third World and environment programmes have confirmed that.

However, advertisers may want to avoid slots which might raise questions in viewers minds about the specific product, or which are merely generally unsettling. On Third World and environment issues, this may skew programming towards 'softer' subjects - wildlife and culture - and away from 'harder' programmes on global pollution, Third World debt, world poverty and human rights abuses.

Programme Obligations - the 'One Third Requirement'

The overall effect of the need for commercial broadcasting companies to maximise their advertising revenue will be a drive towards highest ratings at all times. This will lead to lowest common denominator television and the dropping of costlier, lower rating programmes. At the very least, it will lead to the scheduling of such programmes outside peak hours.

There are different ways in which the continuation of such programmes could be ensured. One option would be to subsidise such programmes from a

publicly-funded trust along the lines suggested by the Peacock Committee. A system could be worked out for the degree of subsidy necessary to make such programming commercially viable.

Another option, which would tie in better with the Government's existing proposals, would be to specify the programme types which would be needed to make up a 'diverse schedule', and at the same time to oblige companies to meet an overall quota of factual programming. The proportion of *one third* is suggested. This would ensure a full range of choice. It would be in line with viewers' own wishes given that they choose to spend one third of their viewing time watching such 'demanding' programmes. To ensure that factual programmes were not just scheduled out of peak hours, the one third requirement should apply to both peak and non-peak time. The existing clause of the Bill refers to high quality current affairs programmes on international matters, but makes no provision for the extent of coverage or when it should be shown.

Keeping down programme costs

Programmes on overseas issues are particularly vulnerable as they are relatively costly to produce (see Table 2). Already, in the current pre-franchise period some overseas filming has been dropped by ITV companies seeking to build up their capital reserves to be able to make a high bid. ?

Programmes 'networked' throughout the ITV regions, incur a net cost to the company of only a fraction of the cost were the company to be producing and transmitting the programme alone. The ITC should have the power to ensure that one third of the networked programmes are factual - the news of course is already networked.

Another way of reducing costs is to raise co-production finance particularly for major productions. But the effort and expense of establishing complex financial and administrative arrangements is only justified if significant profits are concerned. There is less potential for the more modestly budgeted Third World and environment programmes. International co-production also leads to more generalised programmes as they are no longer addressed specifically to the British viewer.

A further way to reduce costs effectively is through promoting the export of a programme. But current affairs programmes date too fast and documentaries, apart from quality wildlife and natural history programmes, have limited potential for sale overseas.

Financing quality and diversity in television

With the thinner spread of revenues over more channels, the issue of maintaining the finances necessary for original production becomes crucial. The Government's proposals for competitive tendering for an ITV franchise give cause for concern on two counts. Firstly, this process will maximise the amount of money taken out of the television industry (and passed to the Treasury) - analysts estimate that an additional £100 - £150 million (above current amounts) could be extracted in this way. Secondly, some franchises

may attract unrealistic bids. This will destabilise the commercial networks as has happened in Australia (see Chapter 7). Securing a franchise could become, in the words of Dennis Forman, "the winner's curse".

These problems would be reduced if the quality threshold were specific as to the range of programme types required and if there was a one third requirement for factual programming (at peak and non-peak times). Companies would then bid less, knowing that they would have to make more expensive programmes with less advertising revenue potential. To ensure proper programme costing and realistic bidding, there should be a close examination of the business plans of franchise bidders.

The auctioning of Channel 3 franchises to the highest bidder is clearly not in the interests of the viewer - quality and diversity will suffer. The ITC should be empowered to award franchises on the basis of assessing bidders financial bids *and* their programme plans together. Such an arrangement would keep the competitive element in the financial bidding process, while also requiring companies to compete over the quality and range of programmes they will show.

The New Media

Because of the relatively small sums available to satellite channels for programmes (Sky and BSB spend around £5,000 per hour, Superchannel around £750 per hour), they are unlikely to contribute much in the way of original programming on overseas issues. Sky's news teams make few overseas trips and much of their overseas coverage is bought from other operators. Documentaries shown on satellite are likely to be repeats. Third World material with its relatively short shelf life is unlikely to be re-run, although environment programmes have greater potential.

Knock-on effects from rating competition

"We have indeed more channels in France than we used to, but we seem to have less consumer choice as programming recipes to reach the largest possible audience are, of course, the same everywhere. Conformity and uniformity settle in with their usual popular justifications: this is what the public wants - look at the ratings. Ratings terrorise the industry as all channels tend to aim at general audience targets. At a slower pace, and a smaller scale, the erosion in quality and diversity is the same that seems to effect the aching American networks... Erosion affects new standards as well. What is interesting has long over-run what is important... Isn't the Princess of Monaco more attractive than the Third World's debts."

(Christine Ockrent, French News Presenter, August 1988)

The lessons from other countries (See Chapters 6 and 7) are very important. A new era of fierce ratings competition will affect both Channel 4 which, it is now proposed, will sell its own air time, and the BBC which is always under pressure politically to justify the licence fee which finances it. Channel 4's remit includes the broadcasting of many programmes which, being aimed at

minority audiences, are commercially less attractive. A review process needs to be built in to the new legislation to ensure that Channel 4 is able to meet the terms of its remit if, in the new era, its share of the ratings drops.

The BBC has been described by the Government as "the cornerstone of British Broadcasting". But this cornerstone will crumble if it is subjected to too much pressure. As George Russell, the ITC Chairman designate, recently said: "If Channel 3 slips, it will drag everyone else down". To date, the BBC has competed with ITV to produce memorable quality programmes. This 'constructive competition' has produced television, frequently acknowledged as having the best range of programmes in the world.

The danger, as is seen only too clearly from other countries, is that competition becomes destructive, leading all channels merely to chase the highest rating. Programmes with lower rating potential would then be downloaded within the BBC onto BBC2, and within the commercial terrestrial system (Channel 3 to Channel 5) onto Channel 4. This would, at a stroke, massively reduce the access of the viewing public to these programmes.

Radio

There are many parallels between the Government's plans for television and radio. The deregulation of independent radio removes the role of the IBA to oblige radio stations to provide factual programming. The proposed legislation for radio goes even further than television and removes the requirement to provide high quality news. The new national radio licences will be awarded only on the basis of applicants required to "provide a diversity of programmes which appeal to a variety of tastes and interests". Clearly it is important that there are more specific requirements for national radio franchises. The other danger to radio's coverage of international issues is the threat that hangs over BBC radio while the future of the licence fee is unresolved.

CONCLUSIONS

The Third World and Environment Broadcasting Project believes that broadcasting competition between channels, regional companies and local stations, should take place within a framework of rules. It believes the following changes, additions and improvements to the Broadcasting Bill are necessary to maintain quality and diversity in broadcasting and ensure that proper coverage is given to Third World and environment issues.

General

*Specific requirements that ensure a full range of programme types should be maintained on each of the terrestrial channels (BBC1, BBC2, C3, C4 and C5), the core of the television system.

*The existing regulation that cable 'must carry' these terrestrial channels should be preserved.

*The Boards of the Independent Television Commission and Radio Authority, and the trustees of C4, should include members with voluntary sector experience.

BBC

*The licence fee system, which funds BBC TV and Radio, should be retained and index-linked to the Retail Price Index. Access to the BBC's television coverage of international issues should not be restricted by subscription.

Channels 3 and 5

*There should be an obligation that one third of C3 and C5's programming should be factual in content, with this ratio maintained for both peak and non-peak periods.

*There should be an obligation on C3 companies and on C5 to include international current affairs and documentaries (and adult education on international issues) in their schedules, including during the main viewing periods.

*The ITC should be responsible for ensuring the coordination of the network arrangements for C3. One third of networked programmes should be factual.

*The auctioning arrangements for C3 licences need to be changed to avoid the draining of production finances. To ensure diversity and quality on British television the ITC should be able to award C3 franchises on the basis of both the range and quality of programmes being offered and the size of the bid. Franchise bidders should be required to submit a business plan detailing the funds that will be put into different programme types. A business plan judged unrealistic by the ITC should be considered good reason

for turning down a franchise bid. Business plans should be required of companies attempting take overs.

Channel 4

*If Channel 4 is to sell its airtime in competition with other commercial channels (C3, C5, satellite and cable), the safety net arrangements for C4 need to be reviewed by the ITC every two years. The ITC should have the power to modify the safety net if Channel 4's financial ability to carry out its remit is being undermined.

Education and Schools

*Educational broadcasting (schools and adult education) must be safeguarded at (at least) current levels on C3/C4 (until there are other channels available which can provide full national coverage of all schools).

*Schools programmes on all channels (including the commercial channels) must be broadcast during school hours, otherwise they will not be accessible to the many schools which lack adequate recording facilities.

*A percentage of C3 and C5's factual programme budgets should be allocated for the provision of outreach arrangements, including the production of materials offering wider informational opportunities to adult viewers.

Radio

*Programme requirements need to be introduced for commercial national radio to oblige the provision of high quality news which includes international issues.

*There should be an obligation on national franchise bidders to provide a wide range of radio programming including current affairs and radio documentaries on international issues.

CHAPTER 1. THE IMPACT OF TELEVISION COVERAGE OF INTERNATIONAL ISSUES

1.1. The Environment

By Robert Lamb and Jenny Richards

Robert Lamb has been director of the Television Trust for the Environment (TVE) since it was first launched in 1984. A former BBC producer, he has also worked for Earthscan, Panos and the United Nations Environment Programme. Jenny Richards, a former freelance journalist, is now editor of TVE's Moving Pictures Bulletin, a quarterly magazine on films about environment and development issues, and co-ordinator of TVE's Moving Pictures film distribution service for developing countries.

Five years ago, the 'environment' was something only architects, sociologists or hippies talked about, and the thing that caused the average British citizen most sleepless nights was the Cold War and the prospect of being helplessly exterminated by radioactive fall-out from a final show-down between the super-powers. Today, as the last remaining strongholds of Stalinism totter and Europe debates the process of reunion and reconstruction, the environment has soared to the top of national and global agendas. A recent survey from the Henley Centre, an independent research organisation on social trends, found that people in Britain worry more about the ozone layer than anything else.

Underlined
Television has, to a large extent, been responsible for this remarkable change in public awareness of environmental issues, aided by the environmental lobbyists. This awareness was demonstrated by the huge 'green' vote in elections for the European Parliament in June 1989. Pressure from the newly-aware British public has led the present Government to give a new priority to environmental issues.

Television images five years ago of the suffering of refugees in the feeding camps at Korem in Ethiopia triggered the largest relief aid effort the world has ever known. In the same way, recent television programmes on acid rain damage, North Sea pollution, the quality of British water, the wanton destruction of tropical rainforests, wetlands and marine mammals, the plight of native peoples, the threat to our climate posed by the hole in the ozone layer and the greenhouse effect have helped fuel grassroots pressure for change in the UK.

Underlined
Television documentaries have the power to explain complex global issues in clear, simple language to large audiences. Television can make the connections between global problems such as the greenhouse effect, fresh water and sea pollution, the disposal of toxic wastes, Third World

environmental devastation in the wake of the debt crisis, and the way we live our lives in the industrialised North. Only an informed public can signal to government, financial institutions and international agencies the urgent need to take the necessary and often difficult decisions to initiate environmental and economic reforms.

Making good documentaries on environmental issues takes time and dedication and long-term backing from broadcast organisations. Deregulation of the present British broadcasting system now threatens to cut off the life-blood for environmental and current affairs documentaries, depriving British viewers of the very in-depth coverage that has helped stimulate public demand for change. Making documentaries is an expensive business.

New, cost-conscious ITV franchise operators with no obligation to "provide high quality current affairs programmes dealing with national and international matters in main viewing periods" are unlikely to view the imperatives of film-makers with the same equanimity and conviction as did Lord Grade of ATV when he first backed the careers of such distinguished film-makers as Adrian Cowell, David Munro and John Pilger.

There is also the very real danger, as David Puttnam warned at the recent Wildlife Film-makers' Symposium in Bath, of a conflict of interests between the new, commercial breed of franchise operators and film-makers trying to express the connections - as highlighted in the Brundtland report, The World Commission on Environment and Development - between such issues as trade, debt, social justice, security, war and the environment.

Puttnam cited the General Electric Company of the USA, with assets of \$40 billion and huge interests in the international defence industry. GEC has publicly-stated ambitions in the communications business particularly with the NBC network. Puttnam questioned how this company would approach issues such as arms control or detente which might affect its commercial operations and commented, "to my mind it is entirely proper to make these speculations - and nowhere more so than in wildlife and environmental programming."

In the United States, cautionary tales abound of clashes between commercial sponsors and film-makers producing programmes for public television (PBS). Public television stations' dependence on corporate funding means, in practice, self-censorship and a bias towards bland, non-controversial programmes. When, in 1986, the New York PBS station WNET screened US film-maker Robert Richter's *Hungry for Profit*, Gulf and Western withdrew its support for the station. This documentary argued that multi-national corporations, including Gulf & Western, were buying up huge tracts of land in the Third World to produce food for export, thereby displacing local farmers and leaving the host countries less able to feed their own people. At an even more extreme level, TV Globo, the commercial television station which is watched by more than 70 percent of Brazil's 60 million population, never shows stories about poor people in Brazil and, as a matter of policy, will not broadcast any film or documentary about the murdered leader of the rubber tappers, Chico Mendes. (killed
Santos never)

Work
Television programmes can have a profound impact on public attitudes to unacceptable commercial practices. Recent environmental documentaries have helped draw attention to such abuses, and have been directly responsible for major changes in commercial and government policies. *Seal Mourning* was a disturbing Central TV/SV2 account of how Norwegian fishermen were systematically violating regulations governing the killing of seals and seal pups and flouting EC import restrictions on seal skins. The programme caused a public outcry after it was shown on Channel 4. The station, MPs and members of the European Parliament were all swamped by protest calls and letters. The European Commission was driven to recommend an indefinite ban on imports of seal skins into Europe and the Norwegian government was forced to call off the 1989 seal hunt.

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The Ivory Wars, a BBC *Natural World* documentary was the third film broadcast in Britain during 1989 on the illegal trade in African ivory and its links with government corruption and civil wars in Africa. It was transmitted in October 1989, on the eve of the annual general meeting of CITES, the convention governing international trade in endangered species. At the CITES meeting the African elephant was finally included in Appendix 1, the category listing the most endangered species.

Inside the Poison Trade, a Central TV/TVE investigation with Channel 4 into the trade in toxic waste from industrialised countries, was shown at the European Parliament and at a conference in Basle in March 1989, where delegates from over 100 countries met to ratify an international ban on toxic waste dumping in the Third World. The film's strength, as one African delegate confided, was that it gave substance to all the rumours about unscrupulous dealers in toxic waste. The programme recorded businessmen discussing how they would set about establishing waste dumps in African countries and the huge profits they would derive from them.

Perhaps most memorably, *Decade of Destruction*, Adrian Cowell's unique, agonizing chronicle of 10 years in the destruction of the Amazon rainforest, has been seminal in alerting the world to the crucial role tropical rainforests play in regulating the global climate.

Supported initially by ATV and later by Central TV, Cowell began filming his *Decade* series in 1980. He saw the Amazon as South America's Last Frontier, the twentieth century equivalent of the American Wild West, where the dominant culture of greed, violence, corruption and exploitation resulted in needless destruction of the rainforest and the people and wildlife who depended on it. Where guns were plentiful, life was cheap and the lure of gold still paramount.

The first two films, *The Search for the Kidnappers* and *Blazing the Trail* (1984), followed the progress of Highway BR 364, the road built into the state of Rondonia, which led to a huge influx of peasant farmers from the South, eager to colonise the jungle. The previously uncontacted Uru Eu Wau Wau tribe of Brazilian Indians were caught up in this frontier drama. They resented the arrival of the settlers in their territory, and kidnapped and

killed the sons of one colonist family. In the third film in the series, *Ashes from the Forest*, Brazil's agronomist and environmental guru Jose Lutzemburger explained the background, and the folly, of trying to export agricultural techniques suitable for temperate European climates to equatorial terrain. *Storms Over the Mountain*, the fourth film, showed the delicate balance of the rainforest ecosystem - and the catastrophic consequence of even minor variations in climate or humidity.

Banking on Disaster (1987) continued the story of the controversial Polonoroeste colonisation programme, which encouraged Brazilian peasant farmers to leave the overcrowded South and clear forest terrain for settlements in Amazonia. The film showed the disastrous impact on the forest of World Bank and Inter-American Development Bank loans. It showed the efforts of the rubber tappers, led by Chico Mendes, to fight the ranching company and the spectators who moved in to buy up the land after the peasants were forced to abandon it. The film was later shown as evidence in US Congressional hearings on the World Bank in 1988, and led to a dramatic change in the Bank's policy on the environment.

Mountains of Gold, (1988) charted the devastation caused by two rival enterprises seeking to yield mineral wealth from the heart of the Carajas mountains in northern Brazil. The high-tech efficiency of the government-owned state mining company was contrasted with the filthy, teeming mass of 80,000 free-lance gold-prospectors at the nightmarish Serra Pelada gold mine, the largest man-made hole ever dug. An extraordinary story of greed, chauvinism and bungling, *Mountains of Gold* also highlighted how loans from the European Community and the World Bank were helping finance the senseless destruction of the forest on either side of the 890 kilometre track of the Carajas railway, built to transport iron ore from Carajas to the coastal port of Porta de Madeira.

Adrian Cowell's films did more than anything else to bring the determined stance of the Brazilian rubber tappers' leader, Chico Mendes, to the attention of the world. *Chico - I Want to Live* (1989) was Cowell's final tribute to Mendes after his tragic assassination in December 1988. Now Mendes has become an international environmental folk hero and Hollywood studios are vying to make the definitive feature film of his life. In March 1989 Adrian Cowell's work was acknowledged by receiving the BAFTA (British Academy of Film and Television Awards) Award for Originality.

Central TV is planning to broadcast all five hours of *Decade of Destruction* in 1990. The series exemplifies Central's long-term commitment to environmental programme-making and to following an issue through. "Charles Stewart and Malcolm Hirst were in Ethiopia before the famine, after the famine broke, and when the aid poured in", says Roger James, producer of Stewart and Hirst's films on Ethiopia, *Seeds of Hope*, *The Village* and *Living After the Famine*. In 1989 Roger James received the UN Global 500 award for producing documentaries which "drew public attention to the destruction of the Amazonian forest and stimulated public assistance to the Ethiopian famine victims in 1984/5."

The impact - and popularity - of films such as *Decade of Destruction*, *Seeds of Hope* and *Seal Mourning* prompts the question of whether environmental films and documentaries of this type should still be regarded as 'minority interest' viewing. Traditionally, nature and wildlife films which attract mass audiences have been put out at peak viewing times, while many current affairs programmes and more controversial documentaries have been scheduled at a much later time. For example, *Animal Traffic*, Ron Order's and Arpad Bondy's memorable investigation of world trade in endangered species, was finally put out two hours later than originally scheduled because Channel 4 executives felt it might 'shock' audiences at 7.00pm.

Over the last five years, the distinction between wildlife and environmental films has become blurred. Both the BBC Natural History Unit and Anglia's *Survival* series now stress the fact that many of the animal species they film are endangered. While not achieving *Dallas* ratings, Graham Creelman's two-hour *Survival* special *Antarctica: The Last Frontier* - a haunting portrait of the now threatened wildlife and ecosystem in Antarctica - drew an audience of eight million in September 1989. A month later, three million people watched *The Ivory Wars*.

Adrian Cowell's *Mountains of Gold* had three and a half million viewers in December 1988; over two million watched *Animal Traffic* and one and a half million *Seal Mourning* in 1989. Current affairs programmes, as opposed to documentaries, now also frequently cover environmental stories. Six million tuned into *Death in the Rainforest*, the BBC *Panorama* investigation into the murder of Chico Mendes.

Programmes like these succeeded in combining complex environmental issues with human stories that kept audiences watching. The danger is that, with the proposed changes in the rules for awarding franchises, they will be replaced with games shows, soaps and sit-coms that attract mass audiences and are cheap and non-controversial. Without the intervention of the few, passionately-committed producers and film-makers currently supported by some of the existing ITV companies, environmental programmes on television could go into sharp decline. It is the survival of these programmes themselves that is now at stake.

1.2. The Third World

By Paddy Coulter

Paddy Coulter is Deputy Director of the International Broadcasting Trust, a consortium of over 70 national voluntary bodies concerned to promote a wider understanding of global development issues through the use of broadcasting. He previously worked as OXFAM's Head of Communications.

"Dawn, and as the sun breaks through the piercing chill of the night on the plain outside Korem, it lights up a Biblical famine, now in the twentieth

century."

With these words on 23 October 1984, BBC reporter Michael Buerk introduced on British television his graphic account of the Ethiopian food emergency. This report was to electrify television viewers around the world and galvanize a massive, if somewhat belated, international relief operation.

There can hardly be a more dramatic example of what the White Paper on Broadcasting referred to as "the unique power of the broadcasting media to shape perceptions and their influence over attitudes and actions."

But no single television report, however powerful, is primarily responsible for the undoubted growth in public concern for the Third World during the 1980s. Rather it has been the steady flow of in-depth programming on international topics which has generated greater empathy in Britain. Third World issues are now covered by a range of different programme types: current affairs magazines, arts and drama, children's programmes, religious and other documentaries. The following two case studies reveal something of the range which British viewers were able to enjoy at peak viewing times during the 1980s. The case studies also show the extent of public response.

Case Study 1: Ethiopia

As Head of OXFAM's Communications at the time of the 1984 Ethiopia famine, I was able to observe, first-hand, the capacity of television to move mountains - in this case mountains of food. In the immediate aftermath of Buerk's BBC TV report the United Nations was to spearhead the distribution of \$1 billion of food aid to the Horn of Africa - an operation which has been described as the greatest single peacetime mobilization of the international community this century.

Yet less than two months before that broadcast, an OXFAM request to the European Commission and the British Overseas Development Administration for generous contributions to an OXFAM-organized shipment of emergency grain for Ethiopia had been turned down on the ground that there was no spare food available - even though there were confident reports of a bumper grain harvest in Europe that year.

The 1984 BBC TV reports from Ethiopia were carried by more than 400 television stations across the globe to an estimated audience of 470 million viewers. In country after country the images of human suffering on television screens in people's homes provoked a wave of public generosity of unprecedented proportions. Governments were shamed into responding and so began a huge international airlift which, for a time, gave Addis Ababa's Bole airport something of the atmosphere of Heathrow. All the aircraft involved, including RAF Hercules were flown in as the direct result of a television report.

By the first week of November 1984, aid workers were treated to the hitherto undreamed-of spectacle of an East/West collaboration involving 20 fixed-wing aircraft and 30 helicopters from the UK, USA, USSR, FRG, GDR, Italy and

Libya airlifting supplies from the main entrepots to internal distribution points. By this time, too, the United Nations had moved to set up a new special office for emergency operations in Ethiopia under the veteran UN administrator Kurt Jansson - again a direct consequence of the television reports.

Part of the explanation for this extraordinary impact lies in the unusual length and prominence given to the Ethiopian footage by BBC TV News. Michael Buerk's reports from Korem and Makelle led the main evening news bulletins on two consecutive nights and ran to eight minutes and seven minutes respectively. Normally Third World stories are given much shorter and less prominent treatment on television news programmes, averaging two or three minutes. Buerk was also exceptional as an Africa-based TV reporter (operating at the time out of Johannesburg).

There are in fact very few Western TV news reporters based in the developing world. As a general rule television news programmes tend to adopt a 'fireman approach' towards the Third World, dispatching reporters with often limited local background knowledge to cover a fairly narrow news agenda of disasters, Royal visits and similar events. Indigenous perspectives easily get overlooked in favour of 'colour', sensationalism and stereotyped imagery.

Viewers have to look to current affairs and documentary programmes to provide the wider context in which the news events occur. These alone have the space and time to explore the missing perspectives -for example on the complex causes of famine.

But documentaries can also pack as powerful a punch as news reports in evoking widespread public compassion or anger. Jonathan Dimbleby's documentary for Thames TV, *The Hidden Hunger*, screened on ITV in September 1973, exposed the Ethiopian drought crisis of the early 1970s. This film not only alerted the international community to the crisis but also contributed directly to the downfall of Emperor Haile Selassie after the screening of the film on Ethiopian television provoked widespread revulsion there.

A decade later, another ITV company - this time Central - produced the first footage of the Ethiopian famine of the 1980s with Charles Stewart and Malcolm Hirst's documentary *Seeds of Despair*. Although this film was screened on ITV in July 1984, its impact is often overlooked in comparison with that of the BBC footage several months later (by which time the food situation had deteriorated catastrophically). Yet linked with the Disasters Emergency Committee appeal, *Seeds of Despair* helped raise £10 million in funds for non-governmental agencies in the summer of 1984.

In an imaginative project backed by the UN Environment Programme, Stewart had been researching and filming the process of desertification in the Ethiopian highlands from 1983 - the very period when a drought crisis became a famine. A remarkable series of films was to emerge for transmission by ITV during 1984/5 - *Seeds of Hope* and *Living after the*

Famine as well as *Seeds of Despair*.

All these Central TV films had as their focus the highland village community and the real lives of individual peasants - a necessary corrective to the news coverage which tended to concentrate almost exclusively on the accessible refugee camps along the tarmac roads and on foreign aid workers as 'Angels of Mercy'. This gave a very distorted picture: by far the greatest numbers in need were to be found far off the beaten track in remote mountain villages. Again the bulk of the relief work was being done by Ethiopians, although many powerful images suggested that it was European aid workers who were 'saving' Ethiopia.

Perhaps the most influential of all the British television films on the Ethiopian emergency was Thames TV's *Bitter Harvest* documentary for the regular weekly ITV *This Week* (then *TV Eye*) current affairs slot which went out on 25 October 1984, the very next day after the screening of Michael Buerk's harrowing BBC TV reports.

This film's juxtaposition of the severe food shortage in Africa with an overabundance in Europe helped shape subsequent media presentation of the famine in the context of the North/South economic debate rather as a remote phenomenon. It heavily influenced national newspaper editorials, church sermons and aid agency campaigns.

It is worth looking in some detail at the factors behind the programme's success. First, it was conceived as a popular programme for a peak time ITV audience. Second, the reporter, Peter Gill, had extensive Third World experience and particular knowledge of East Africa from previous work and travel. Third, the Thames current affairs team enjoyed a programme budget which could extend not just to an expensive shoot in northern Ethiopia but also to filming in Italy (the UN Food and Agriculture Organisation in Rome), Belgium (the EC in Brussels), East Anglia (for extensive English agriculture) and a harvest festival elsewhere in the UK - and all this in a half hour programme.

The news agenda on Ethiopia was also expanded by a number of other documentary-makers. Grant McKee's *Tigray: The Unofficial Famine* for Yorkshire TV, which was transmitted on the *First Tuesday* strand in February 1985, revealed the other, more inaccessible and hitherto neglected side of the Ethiopian famine story: the exodus of drought victims from the rebel-held war zones of Tigray Province.

Invaluable documentaries by BBC TV reporters Richard Kershaw and later John Humphrys revealed similar food emergencies in Sudan and highlighted the practical action needed to tackle famine more widely in Sahelian Africa. Granada TV's *World in Action* produced *Politics Of Starvation* which was transmitted on ITV in November 1984. This film was one of the first to address the important political issues underlying international aid.

Case Study 2: Cambodia

British television coverage of Cambodia provides an interesting parallel to

that of Ethiopia. Although Cambodia is a country with negligible direct links with Britain, television has twice in a decade prompted a tremendous outpouring of compassion and generosity towards the Cambodians from British people.

John Pilger and David Munro's *Year Zero: The Silent Death Of Cambodia*, which was screened on ITV in late October 1979, was the first television programme to alert the world to the genocidal ravages of Pol Pot's Khmer Rouge regime. As the full story broke of the sufferings of the Cambodian people, huge sums of voluntary donations were raised - \$100 million by Western non-governmental organisations alone. In Britain OXFAM was so inundated with offers of help following *Year Zero* that teams of volunteers had to be drafted in to deal with the contributions.

Exactly 10 years later the same Pilger/Munro team returned to the issue with their Central TV film *Cambodia Year 10* which was transmitted on ITV on 31 October 1989. Focusing on the continuing international isolation of Cambodia and the threat of a resurgent Khmer Rouge, this programme provoked an enormous public outcry. OXFAM received 3,500 phone calls from concerned viewers immediately following transmission, keeping their HQ staff occupied until 3.00 a.m. Central TV themselves received 1,000 similar calls in the first 24 hours after the programme and over 17,000 letters in the following days.

The level of response was such that Central TV felt obliged to produce *Cambodia Year 10 Update* covering key debates in the House of Commons and in the UN General Assembly. Central succeeded in securing a rescheduling of ITV programmes at short notice to enable transmission of the *Update* on 21 November.

The ground for this scale of public concern was prepared by a remarkable group of documentaries which had served to put the plight of Cambodia back onto the public agenda. First in the field was Jane Corbin's BBC TV *Panorama* in 1988 which filmed inside Cambodia as well as in the refugee camps along the Thai/Cambodian border.

This was followed by an extremely moving *First Tuesday* documentary by Yorkshire TV's Peter Kosminsky who examined the predicament of Cambodians trapped in a hopeless and violent existence in the border camps. Channel 4 commissioned a powerful expose of the continued sinister role of the Khmer Rouge for C4's *Dispatches* current affairs strand.

These case studies on Ethiopia and Cambodia represent only a small part of UK television's output on Third World topics. This output includes the popular anthropological programmes of Granada TV's *Disappearing World* series which has brought the cultures of remote societies into British living rooms.

Programmes like these can attract substantial audiences - in the case of

Disappearing World over seven million viewers - but they rarely have large enough audiences to justify themselves commercially. Overseas filming is expensive - an average production cost for a 60-minute documentary on an international issue is between £100,000 and £150,000.

Third World programmes on ITV are at particular risk from the proposed new legislation. If ITV companies are no longer obliged to screen international current affairs programmes at peak time, *This Week*, *World in Action* and other similar programmes are likely to be moved from their present prime-time slots with large audiences to late-night slots with markedly lower ratings. This will lead to reduced programme budgets, which in turn will lead to a reduction in the scope and quality of ITV's international coverage.

In this Brave New World of independent television there will be financial pressure to cut down on any extra overseas filming requirements, such as the film shoots which gave Thames TV's *Bitter Harvest* its distinctive quality. It is questionable whether future ITV programme budgets will be allowed to stretch to substantial Third World filming in the first place.

ITV audiences will be deprived of real choice if these programmes are pushed out of peak-time. They are unlikely to be the only losers because of the knock-on effect on other channels - BBC1 and even Channel 4 are not immune from ratings pressure. Nor is it solely viewers who would be affected. One of the more insidious effects of any loss of competition would be on programme makers on rival channels. For it has been the culture of competition between the BBC and ITV which has fostered higher film-making standards and helped establish internationally British television's particular reputation for programmes on Third World themes.

1.3. Education: Broadcast or Narrowcast?

By Paul Gerhardt

Paul Gerhardt is the Network Education Officer at Thames Television. After working in adult education he joined the International Broadcasting Trust as its first Education Officer and later Deputy Director.

The Broadcasting Bill breaks with all former legislation by no longer requiring all broadcasters to provide a mix of information, education and entertainment. Instead, with the exception of C4, commercial broadcasters will be free to respond to the demands of the marketplace. But in the case of educational television we need to ask some fundamental questions: How is educational need to be reflected in market demands? Can there be a 'market demand' at all? And what is it that distinguishes educational broadcasting from other informative programming?

Environment and development programming is a case in point. A news diet of disaster stories and famine relief inadequately informs the general public

of the complexity of Third World and global environmental issues. When educational programmes such as IBT's *Battle for the Planet* or Central's *The Nuclear Age* are shown, the response is both immediate and substantial. Viewing figures and requests for printed materials reveal the educational need and the interest of viewers. But the programme makers must take the risk of investing resources, and to do so they need to be supported both institutionally by the major television companies and by legislation which obliges them to make non-commercial programmes.

The legislation now proposed relies on a number of potent myths about educational television. The first, and most corrosive, is the notion that educational television is always minority television. A recent cluster of programmes about runaway teenagers and children in care on ITV commanded a total audience of over 15 million. These were products of an ITV Education Department, and the viewing figure for the centrepiece of the series, the drama *Somewhere to Run*, was equal to the popular soaps of that day. There are many other examples of programmes which have been designated 'educational' and nevertheless win large audiences, for instance the popular science programmes *Take Nobody's Word for It* (BBC) and *The Secret Life of ...* (C4).

Educational television should not, however, need to command a large audience in order to justify its existence. It is there to cater to a wide range of learning needs. Its agenda is set by those needs among all age groups and in all sections of society. Although there is a case for improving the methods by which those needs are identified (at present educational proposals are 'validated' by advisory committees appointed by the IBA and the BBC), it is essential that educational television retain its separate identity. The form of the programmes, whether documentary, discussion, drama or light entertainment, needs to correspond to the educational aims. But the programmes themselves nevertheless remain distinct because their agenda is set outside the industry. They also require appropriately skilled programme makers and field officers, and above all they need access to the channels which make it possible for them to reach the target audience.

Another myth, central to the thinking behind the Bill, is that those who need educational television can always find it. If this were true then Channel 4, or BBC 2, would be the ideal carriers. But this confuses the educational needs of the sophisticated, who may search out the Russian language course they want, with the needs of those unable to define their requirements. The immensely successful literacy project which began with *On the Move* would never have taken off without peak time access to BBC 1. Viewers with reading difficulties do not seek out the programmes that can help them, any more than they would enter an adult educational college without encouragement.

The surprising aspect of the proposed legislation is that all the government departments know this truth about adult learning needs except, it appears, the Home Office. The Department of Health has always seen mainstream broadcasting as an essential vehicle for AIDS education and other public health campaigns. The Department of Education recognises the

enormous value of schools programmes in the classroom. Employment, Trade and Industry, Environment and Overseas Development, all acknowledge that TV programmes can both shape their policies and influence the presentation of those policies. It is unlikely that any department would wish to have their access to television shifted from broadcasting to narrowcasting, where they end up preaching to the converted.

A third myth is that the viewers themselves do not want educational programmes on popular entertainment channels. We have already seen that some past programmes have reached large numbers of viewers. As for the future explosion of new channels, research commissioned by the IBA earlier this year revealed that educational programmes for adults ranked fifth in a list of 33 categories of material which viewers would most like to see provided by the new stations. It ranked higher than drama or current affairs and below films, nature and wildlife. Most viewers welcome a two-thirds/one-third mix of entertainment and information/education. This is also true for Europe and North America.

But the most worrying assumption underpinning the legislation is the notion that educational television will survive indefinitely on Channel 4 and on the BBC. Because only ITV will have its public service obligation removed there will be, it is suggested, no danger to the rest. But although there are committed commissioning editors and programme makers in both the BBC and C4 who will strive to maintain their output, it is worth noting what will be lost and what pressures the surviving programming will come under.

An immediate loss will be the 156 hours annually of networked adult education and local social action reporting currently carried by ITV, together with the infrastructure of programme makers, community outreach workers and back-up. There are no plans to switch this output to Channel 4. It would be a straight loss of some 20 percent of the total output, and of the part watched by most viewers. This includes the only part of the educational output on any channel which is regionally based. One third of ITV's educational programmes service local needs and each company employs a Community Education Officer to follow up the output.

ITV also provides 375 hours of Schools Television a year, currently shown in the mornings on Channel 4. It is likely that this will be 'safeguarded' by being handed over to the fourth Channel and eventually transmitted in 'down time' (i.e. the early hours of the morning). If this happens there will be three results: less money will be spent on programme quality; less schools will use the programmes because they lack the equipment or staff to video; and there will be acute pressure within the BBC for its schools service to follow into 'downtime' as well. Schools programmes will also suffer from the loss of adult education programmes on ITV, many of which are re-edited for use in the classroom.

The remainder of Channel 4's educational output will continue in an increasingly competitive environment. The Channel will be competing for advertising revenue with Channel 3/ITV, the new Channel 5 and new satellite services. Within the entire commercial sector it alone is expected to

shoulder the burden of educational television - which will be seen as a burden by an advertising sector under pressure.

The loss of ITV educational programming will also have repercussions in the BBC. It will be increasingly hard to defend Continuing Education output on BBC 1 when the channel with which it competes directly, ITV, has cleared its schedules of educational material. If the BBC switches all its education programmes onto BBC2 then education will indeed have become a minority service. The average number of viewers for an educational programme on UK television will have been reduced by 90 percent. And the switch from broadcasting to narrowcasting could bring with it demands that the minority service should 'pay for itself'.

This revolution in broadcasting will reduce rather than increase choice. At a time when broadcasting has a significant contribution to make to the learning needs of our society, educational programme makers are going to lose their access to the popular audience. At a time when Britain is to be further integrated into the European economy, when European and world events shape our lives with increasing frequency, when environmental, industrial and health changes require flexible learning skills from us all, the government proposes to drop the access of educationalists to the mass channels.

The effect of the Bill will be to require ITV to entertain at the expense of education. Such a loss from the schedules of the most popular channel is likely to seriously undermine, rather than to strengthen, the educational remit of the other channels. We are in danger of losing a vital resource which can make a significant contribution to our understanding of the world and of our ability to shape it to our needs.

CHAPTER 2. ANALYSIS OF BRITISH TELEVISION COVERAGE OF THIRD WORLD AND ENVIRONMENT ISSUES (1987-1989)

By James Firebrace

James Firebrace is the Director of the Third World and Environment Broadcasting Project. He was formerly Chairman of the European interagency consortium, ACORD, and Programme Director for Africa North and the Middle East for War on Want. In the late 1970s he spent four years in the developing world administering training programmes chiefly for health workers. He has been a regular contributor to the British media debate on development issues, and has written books and articles on the social and economic problems facing the Horn of Africa and the Middle East.

Particular thanks are due to Jane Hardstaff and Rebecca Cowing for their painstaking work in collecting the data used in the tables of this chapter. The data on audience ratings used in Tables 10 to 13 was obtained from the relevant BARB reports.

Background to the Research

Television's coverage of the Third World and the environment occurs in three forms - news and news magazines; current affairs; documentaries; and drama. This research looks primarily at current affairs and documentaries, which was judged to be the area most under threat from the proposed changes in legislation. Such programmes are seen as important for providing the context and background of events covered on the news, thereby permitting empathy and a more profound understanding.

The research was carried out because little has been known to date about the extent of Third World and environment programming, its content and the size of its viewing audience. In the context of the legislation, it was seen as important, first to judge the relative importance of the different channels in providing the British population with this kind of informative material and, second, to establish a bench-mark on the current situation against which future changes can be monitored.

The research looked at television programmes in a two year period starting from 1st September 1987. Programme descriptions were found in the Radio Times and the TV Times. A 'Third World and Environment ('3WE') Programme' was defined as one whose content concerned the environment, wildlife or ethnic minorities outside the UK or which concerned the developing world.

Extent of 3WE programming on the different television channels

Over the research period there were 746 3WE programmes, or 373 per year,

Table 2.1: Number of 3WE programmes per year by channel

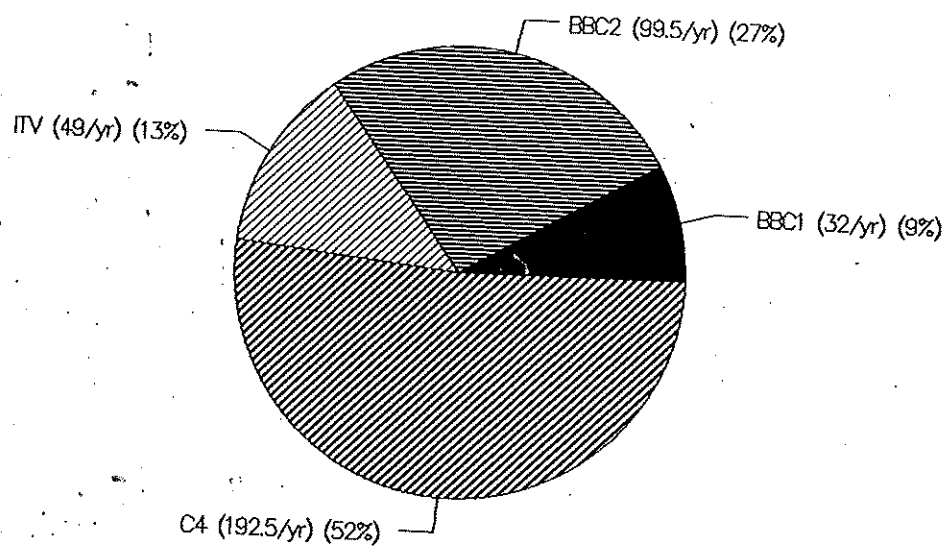
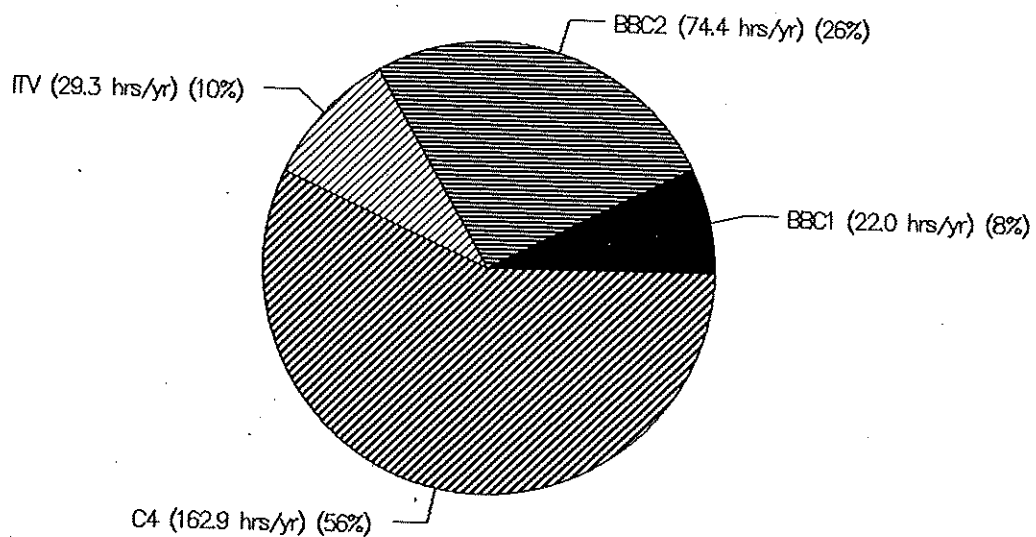


Table 2.2: Hours per year of 3WE programmes by channel



distributed between channels as shown in Table 1. About one half of 3WE coverage is on Channel 4, with BBC2 taking a further quarter, and ITV and BBC1 between them the final quarter. There were 289 hours per year of 3WE programmes over the four channels (see Table 2).

The differing lengths of programmes on different channels, in particular Channel 4 tends to have longer programmes, means that the distribution of hours by channel is slightly different from the distribution by number of programmes. The proportions of 3WE programmes within Channel 4 and BBC2 non-news factual programming (14.1 per cent and 6.3 per cent respectively) are significantly higher than the proportions within BBC1 and ITV (2.2 per cent and 2.8 per cent respectively) (see Table 3).

Our study did not examine news content, but Table 4 is included to give a picture of the distribution of news coverage (domestic and international). BBC1 and ITV devote most hours to news.

Hours of Scheduling

This is important because programmes shown at peak time (defined for our study as programmes starting between 6.00pm and 10.30pm) attract much greater audiences than programmes shown at non-peak times (see Table 5). It can be seen that most Channel 4 3WE programmes are shown outside our definition of peak time. It should be pointed out that Channel 4, in contrast to other channels, still attracts high audiences at 10.30pm. 70 percent of BBC2's 3WE programming is at peak time. ITV's peak coverage is one and a half times that of BBC1.

Programme content by theme

By making a judgement as to its main theme, each 3WE programme was placed into one of seven categories.

*'Environment': programmes filmed outside the UK on issues such as desertification, pollution, the depletion of the ozone layer and the destruction of the rain forests.

*'Wildlife': programmes filmed outside the UK on wildlife and disappearing species.

*'Development and Human Rights': programmes filmed in developing countries covering issues such as food crises, debt, women in development, apartheid, etc., also programmes on ethnic minorities in the industrialised world (outside the UK), eg. African workers in France.

*'Third World Politics': programmes on a particular developing country or region, eg. civil war in the Philippines, Namibian elections.

*'History': programmes looking at the history of developing countries, eg. the Vietnam war, British Colonial history.

Table 2.3: Proportion of 3WE programmes within 'current affairs, documentaries and general factual material'

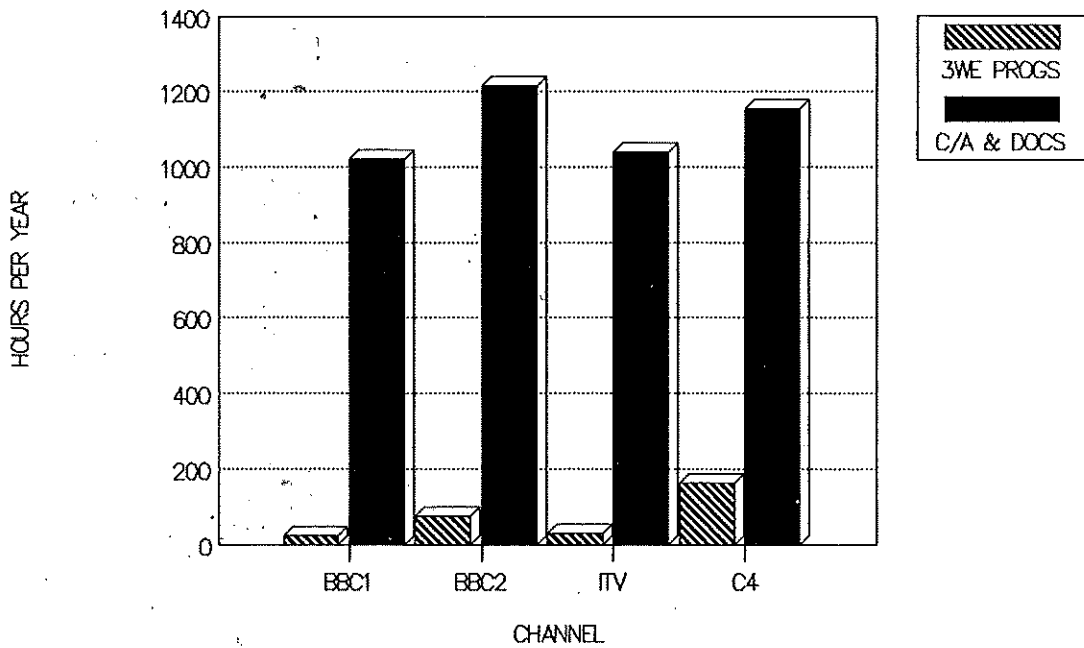
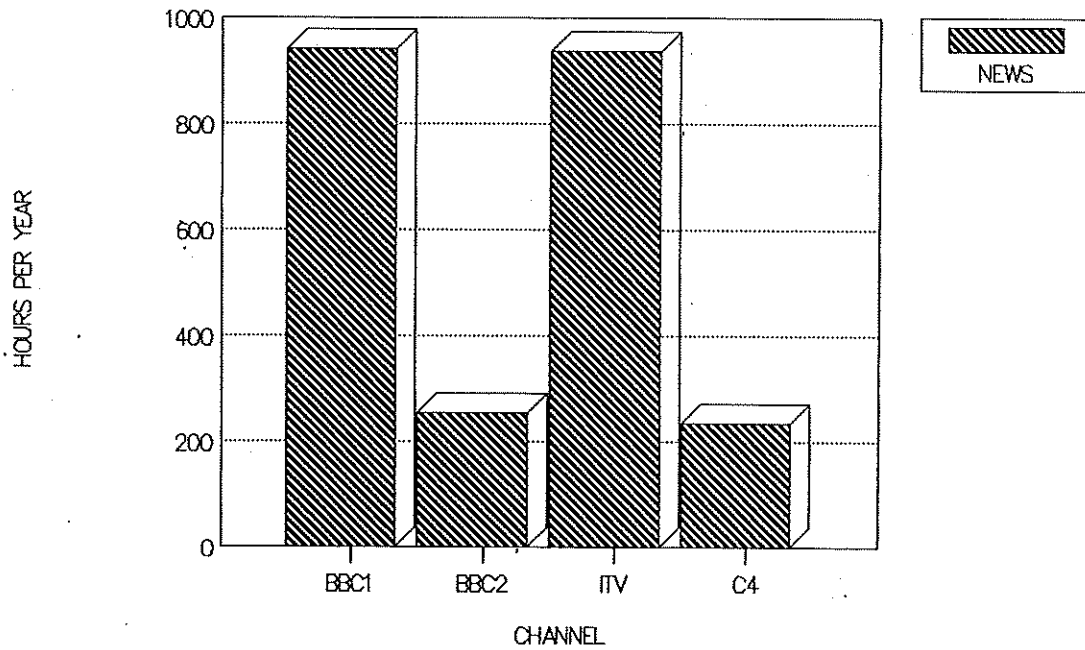


Table 2.4: News coverage by channel



*'Travel and Exploration': famous voyages and expeditions.

*'Arts, Religion and Culture': African music, the Indian film industry, Islam today, etc.

On the whole, this classification posed few problems as usually the main theme stood out unambiguously. Only occasionally were there difficult choices. To take two examples from outside our study period: *Cambodia Year Zero*, which exposed Khmer Rouge atrocities, would have been categorised under 'Development and Human Rights' while *Cambodia Year Ten*, which looked at the diplomatic recognition being gained by the Khmer Rouge, would have been placed into 'Third World Politics'. 'Environment' and 'Wildlife' programmes make up one-third of all 3WE programming. The various categories of Third World programmes make up the other two-thirds (Table 6).

'Wildlife' gets the most coverage at peak time and 'Arts, Religion and Culture' the least. Apart from the latter, all programme categories received good coverage at peak time (see Table 7).

We see that the bulk of 'Arts, Religion and Culture' programmes are on Channel 4. BBC1 is strongest on 'Environment' and 'Third World Politics', ITV on 'Wildlife' and 'Development and Human Rights', while BBC2 achieves a good spread across all programme categories (see Table 8).

Programme content by location

The 3WE programmes were categorised by location. The Third World categories only included programmes with content from Asia, Africa, South and Central America, and the Middle East. Programmes spanning continents were put into a 'General' category. Asian countries tend to get the largest coverage, particularly on Channel 4. This probably reflects Channel 4's 'minority programming' for the Asian population. There are no glaring gaps in the overall coverage by continent (see Table 9).

Audience size and audience appreciation

A comparison of ratings for the different programme types shows that 'Wildlife' programmes are ahead with an average peak rating over all channels of 3.7 million. But 'Environment', 'Development and Human Rights' and 'Exploration and Travel' are not far behind with average peak audiences of 2.8 million (see Table 10). (NB: The time at which a programme is shown is the most significant factor influencing its rating. The nature of the programmes being shown on the other channels also has a large effect on an individual programmes' rating.)

Average peak audiences for 3WE programmes on BBC1 and ITV are around the five million mark compared to 2.5 million on BBC2 and 1.5 million on Channel 4 (see Table 11).

Table 2.5: Hours per year of peak and non-peak 3WE programming by channel

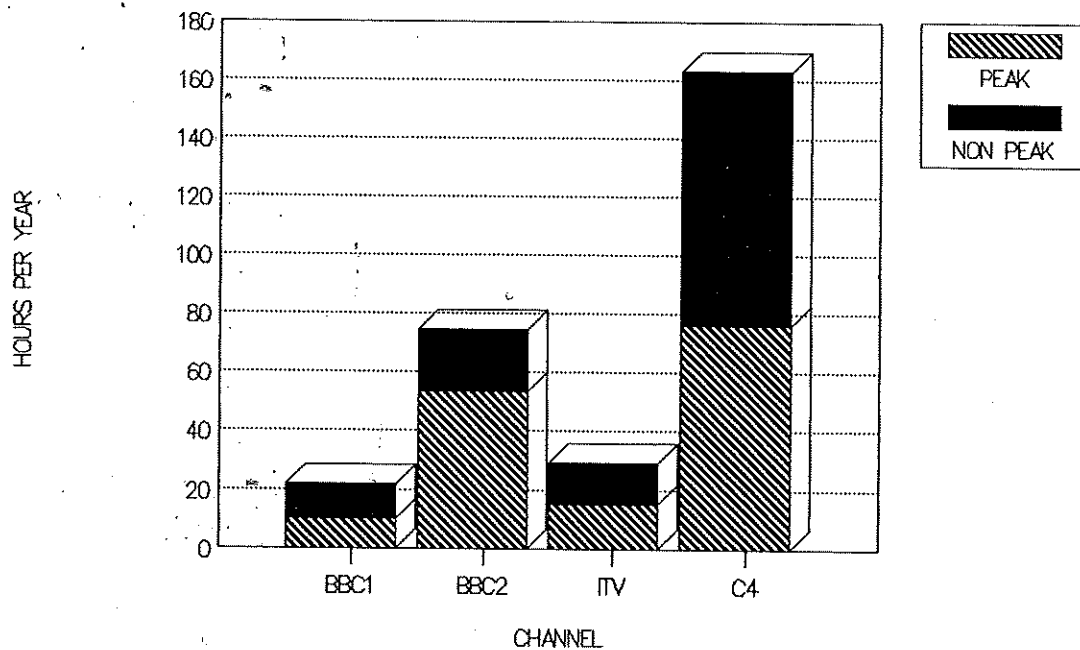


Table 2.6: Distribution by programme type (all channels)

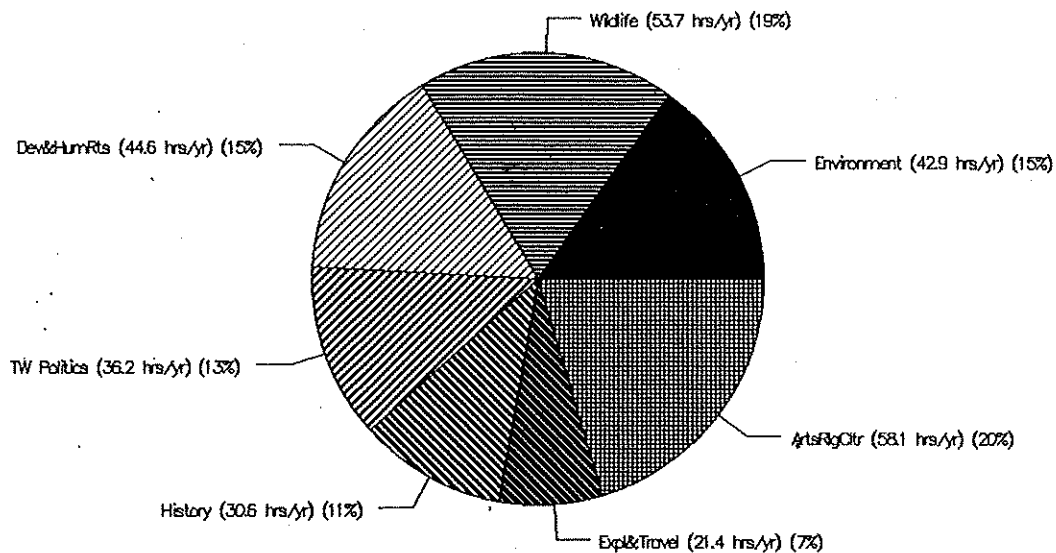


Table 2.7: Distribution by programme type between peak and non-peak times (all channels)

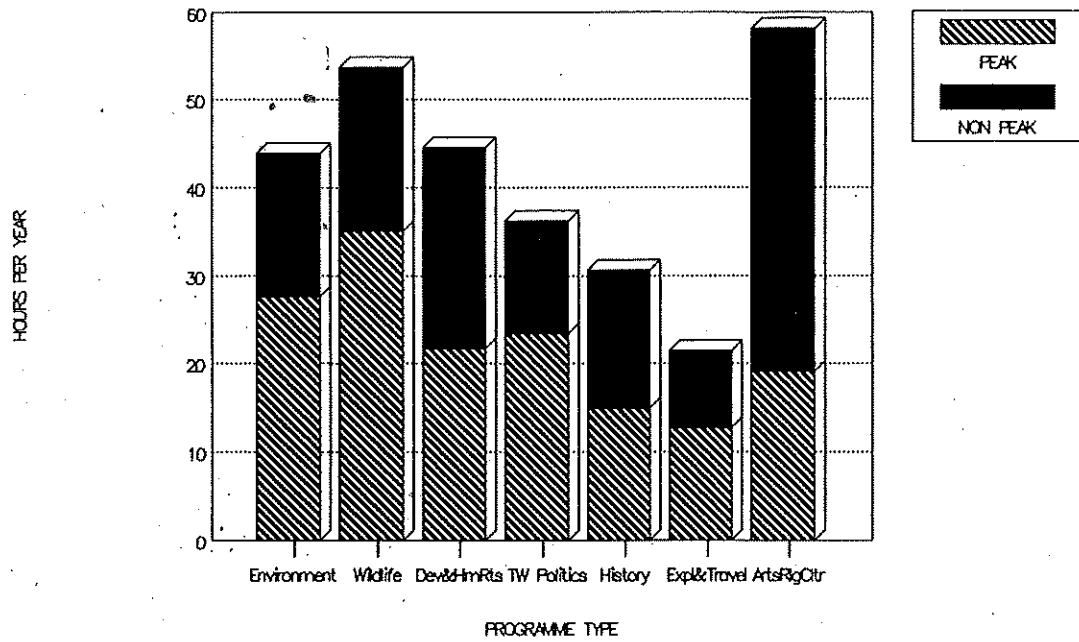


Table 2.8: Distribution by programme type between channels

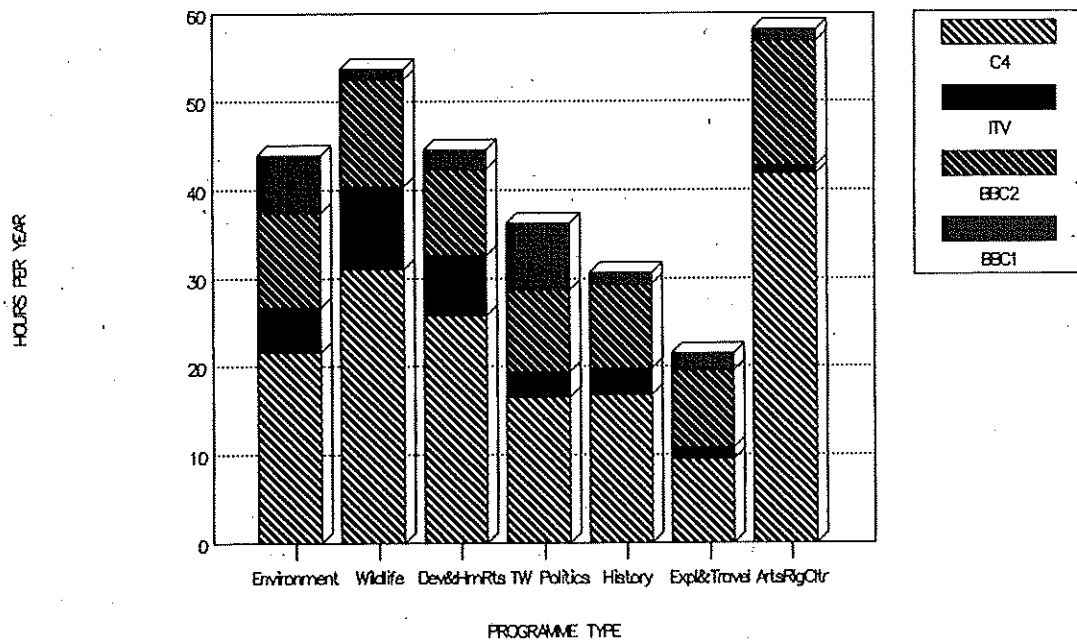


Table 2.9: Distribution of 3WE programme content by location

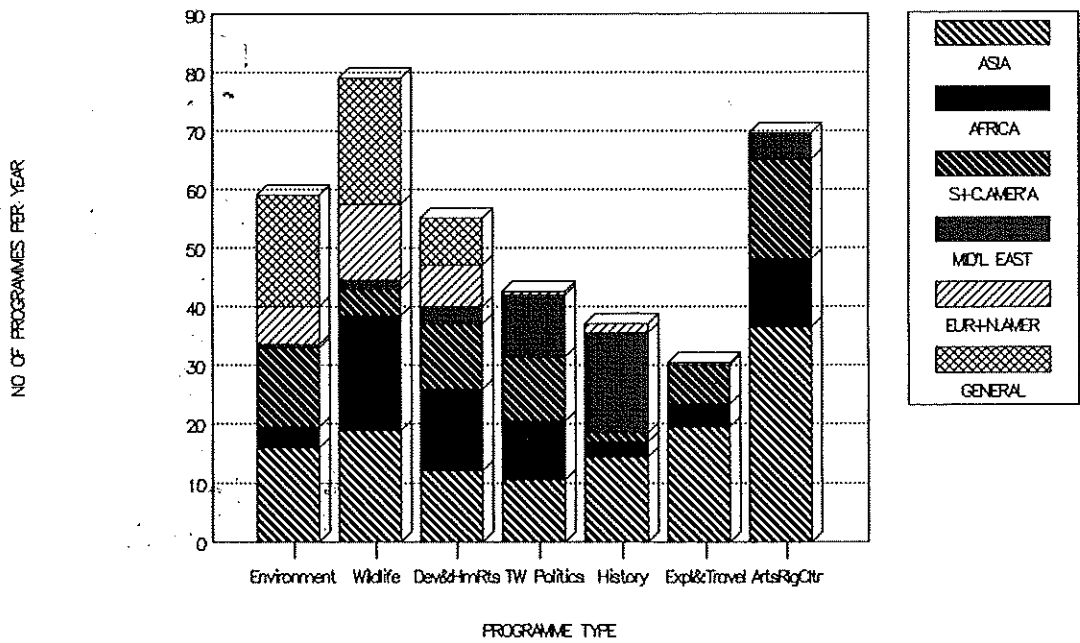
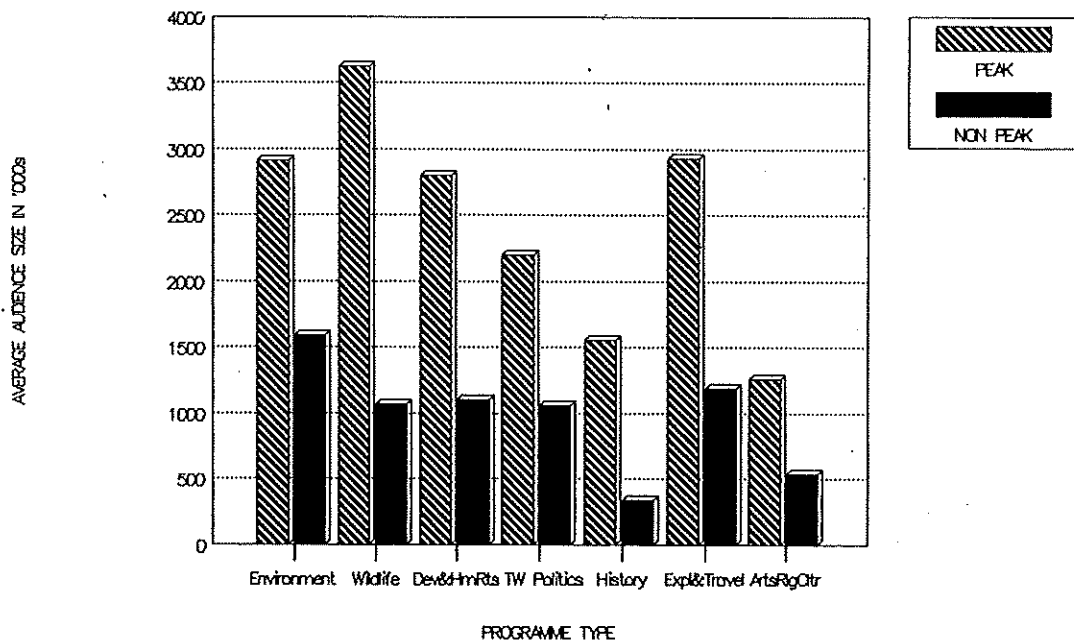


Table 2.10: Audience size by programme type between peak and non-peak (all channels)



Most of Channel 4's 3WE programmes are viewed by less than one million people. BBC1 has a high proportion (two thirds) in the two to four million range, while ITV's 3WE programmes receive the highest ratings with a quarter watched by over six million. The highest ratings of all were obtained by series such as *World in Action*, *This Week* and *First Tuesday* (see Table 12).

We also looked at the 'Audience Appreciation Index' (AI) figures for a four month set of programmes within the study period. The AI gives an indication of the extent to which viewers find the programme enjoyable and interesting. No AI figures were obtainable for about one quarter of the programmes examined as these received low ratings and less than the cut-off of 25 responded to the survey questions. Where data was obtainable - on 128 programmes in our small sample - the average AI was 79 showing an excellent audience appreciation for Third World and environment programmes. see
7

Audience Reach

To arrive at an idea of the influence or 'reach' of different channels we added together all the ratings of 3WE programmes by channel - the equivalent of multiplying the average rating by the number of programmes. The concept of 'reach' thus takes into account the fact that, for example, while Channel 4 may carry many 3WE programmes they tend to have low ratings. Channel 4's 3WE 'reach' proves to be comparable in size to that of ITV which, while showing less programmes, does so to many more viewers.

ITV accounts for one third of the overall TV reach for 'Environment' and 'Wildlife' programmes, and for over one quarter of all the 3WE programming. The four channels have about equal reach for 'serious' Third World programmes (see Table 13).

Independents

As one would expect, the majority (58 percent) of Channel 4's 3WE programmes were made by independent producers. Five percent of BBC1's 3WE programmes and 14 percent of BBC2 and ITV's 3WE programmes were produced by independents. These figures compare with the proportion, of *all* programmes by independents, of five percent for BBC (1 and 2), five percent for ITV and 50 percent for Channel 4 (1988/89 figures, source IPPA). So independent producers play a greater role in the making of 3WE programmes than they do in other programme areas (see Table 14).

Conclusions

*Channel 4 and BBC2 carry the most hours of 3WE programmes (56 percent and 26 percent respectively).

*3WE programmes do attract very significant audiences (four to ten million) when shown at peak time on the most popular channels (BBC 1 and ITV).

Table 2.11: Audience size by channel between peak and non-peak (all programmes)

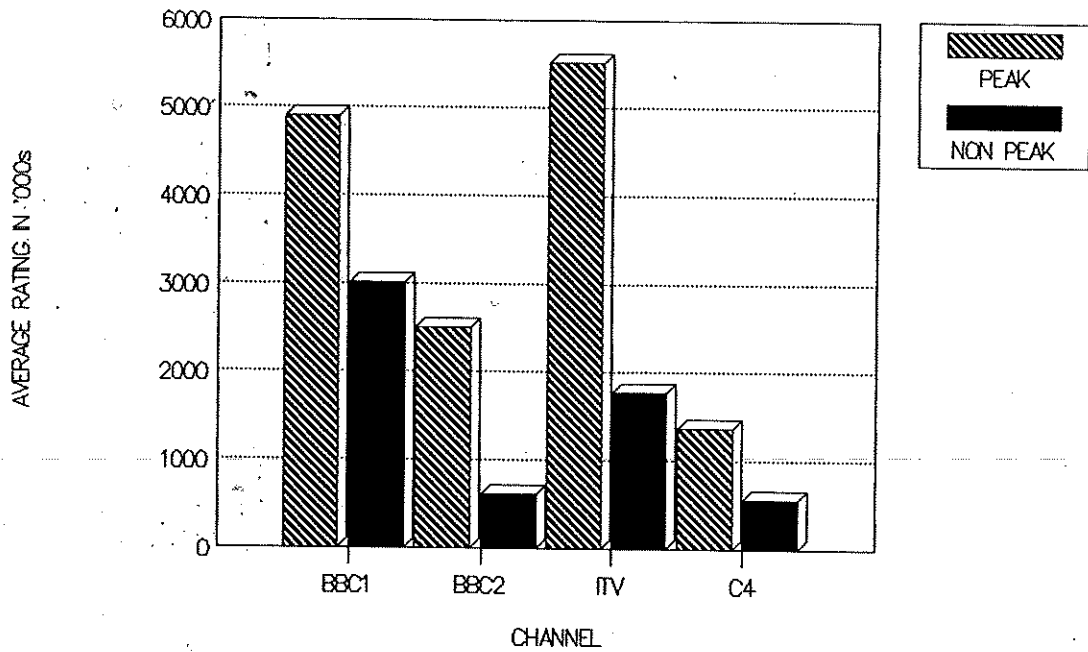


Table 2.12: Ratings spread by channel (note non-linear scale)

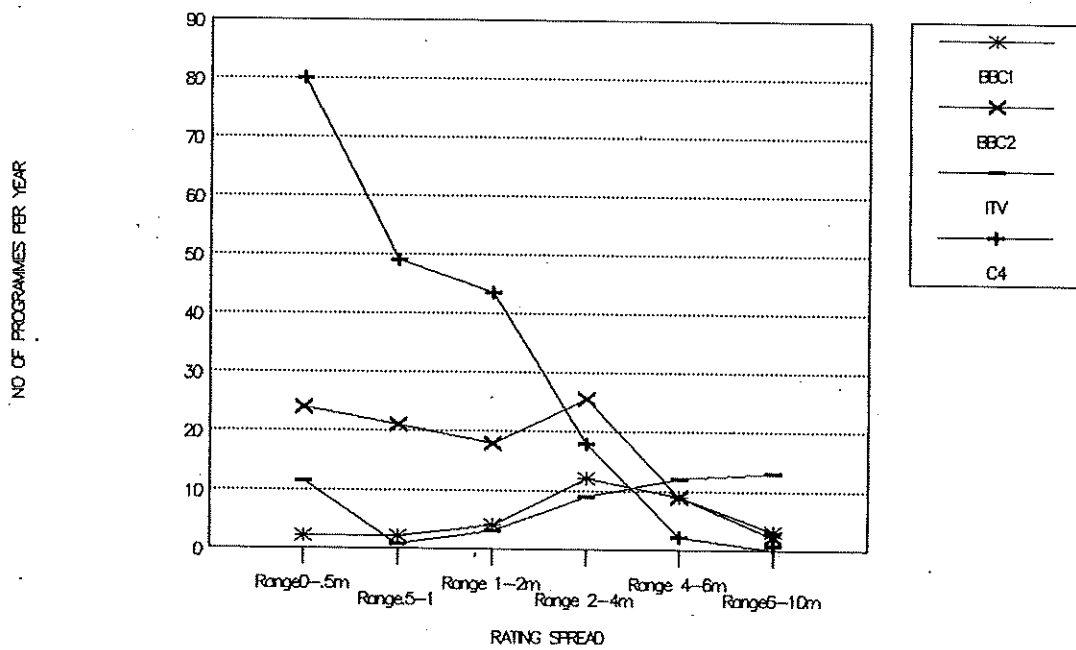


Table 2.13(a): Audience reach (sum of ratings by channel) - All 3WE programmes

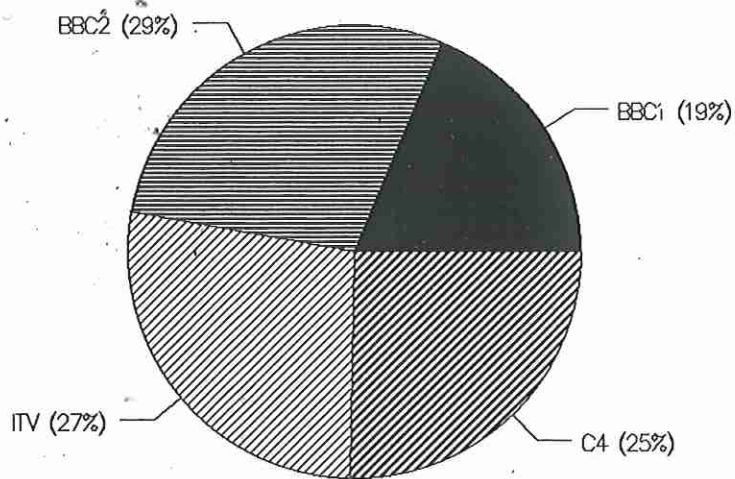


Table 2.13(b): Audience reach (sum of ratings by channel) - Environment and Wildlife programmes

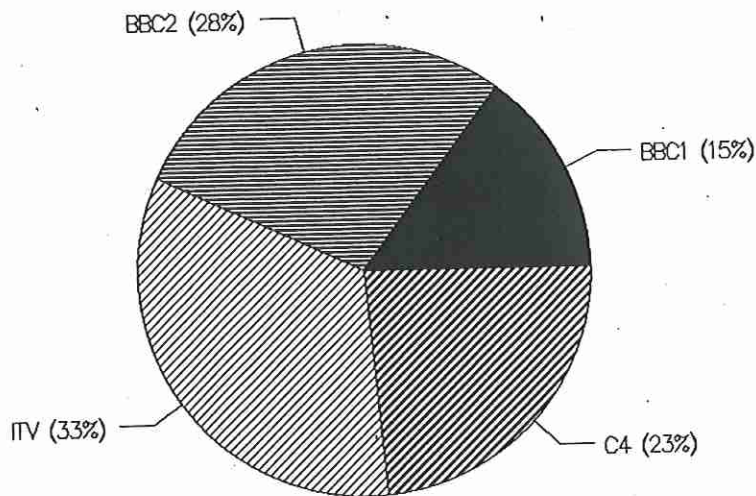


Table 2.13(c): Audience reach (sum of ratings by channel) - 'Serious' 3W Programmes ('Development and Human Rights', 'Third World Politics' and 'History')

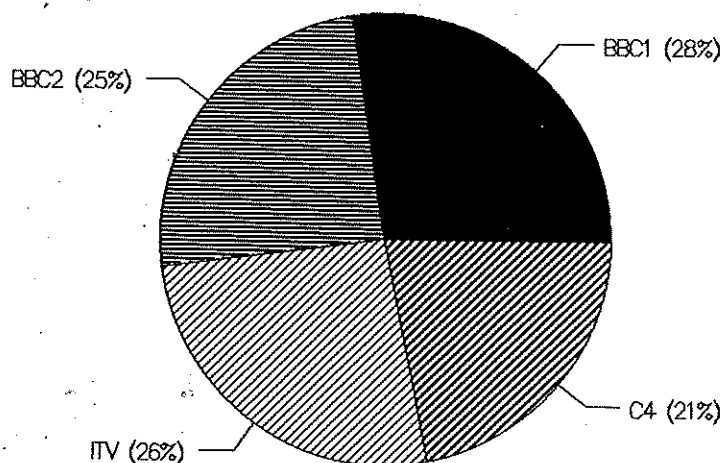
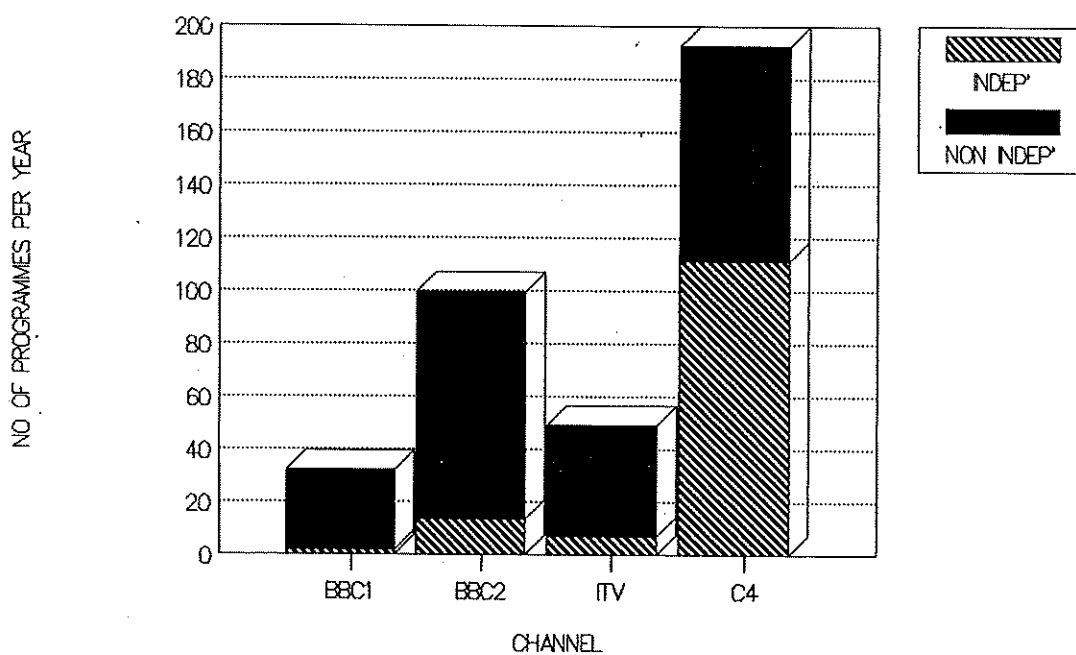


Table 2.14: 3WE programme production by independents



*ITV's programmes account for 27 percent of the total 3WE 'reach' (sum of ratings). This compares to BBC1's 19 percent of total 3WE reach. The reach figures confirm the importance of 3WE programming on ITV, especially when one considers that the ITV audiences are less likely to be familiar with 3WE issues than the 'committed' Channel 4 audience.

*Within the 3WE range, 'Wildlife' programmes are the most popular. But 'Environment' and 'Development and Human Rights' programmes are only a little behind in popularity.

*There is good coverage of global environment, development, human rights and Third World cultural issues on each of the four channels. There are no significant gaps in the coverage given to different continents.

CHAPTER 3. FACTORS IN DECIDING TELEVISION SCHEDULES

3.1. The Effect of Regulations on Commercial Television

By Roger James and Karen Mellor

Roger James is Head of Documentaries and Current Affairs at Central Television. Beginning his TV career in 1960 with ATV as a film editor, he later became Executive Producer of Network documentaries for Central TV, responsible for their flagship documentary series Viewpoint. In February 1988, he was appointed Central's Commissioning Executive, Documentaries, moving to his present position in September 1989. Earlier in the same year he was honoured with a UN Global 500 Award for his contribution to environmental coverage on television.

Karen Mellor began her television career with Granada TV in Manchester. In 1974 she joined ACC as Group Press Officer, involved in corporate affairs and responsible for publicity on all ATV's documentaries and major drama series. In 1985, she was appointed Programme Associate to Central's Features Group, where she is involved in the commissioning and editorial side of the department.

In 1984 Central Independent Television, with co-sponsorship from the United Nations Environment Programme, set up the now flourishing Television Trust for the Environment (TVE), a non-profit making organisation aimed at supporting the worldwide production and distribution of environmental programmes. The setting up of TVE had been one of the planks in Central's franchise bid and it reflected the company's commitment to public service broadcasting as a required part of its franchise application.

From this association with TVE sprang major long-term projects like Adrian Cowell's acclaimed *Decade of Destruction* series, a unique chronicle of the destruction of the Amazonian rainforests throughout the 1980s, co-produced with the Brazilian University of Goias; and Charles Stewart and Malcolm Hirst's continuing series of films about the drought in Ethiopia which first alerted UK television audiences to the 1984-5 famine. These bold commissions were made long before the environment became today's subject of widespread news interest, of concern to world leaders and the general public alike.

In the present regulated ITV system, such long-term commissioning of serious, lower-rating subjects has been possible because mandatory documentary slots guaranteed their transmission. Series like *First Tuesday* (Yorkshire), *This Week* (Thames), *Disappearing World* and *World in Action* (Granada) have also been able to flourish under the same system. *First Tuesday's* campaigning coverage of the Guildford Four story was in the best

traditions of the public service ethic. Although it is now widely applauded, at the time the programmes were commissioned, advertisers were unlikely to be impressed by their ratings potential. The programmes were made because the Yorkshire team had commitment and guaranteed access to slots. But the Government's shift in policy towards deregulation of ITV, albeit with a minimum quality hurdle, is changing the ground rules. The climate of broadcasting is beginning for the first time to mitigate against serious, in-depth, factual coverage.

If ITV is obliged to compete in a future deregulated commercial world, there will inevitably be less emphasis on public service output. As competition from other channels, like satellite, cable and C5 increases, ITV controllers are likely to respond to the pressure by transmitting more downmarket and popular programming to maximise the audience. This threatens to squeeze programmes like *Decade of Destruction* and *Disappearing World* out of the ITV schedules altogether. Ironically most advertisers are now pointing towards the BBC1 schedule, which includes a greater volume of documentaries, environmental and Third World coverage, as attracting the spread of audience profile they need to target effectively their advertisements.

Another problem is ITV's increasing move towards commissioning through the new 'Flexipool' system. In the past the majority of network programme slots were guaranteed to the five largest companies: Thames, London Weekend, Yorkshire, Granada and Central. Under the Flexipool system, half network time is still guaranteed to the Big Five. The other half constitutes a 'Flexipool' of network hours in which all 15 companies can compete to place their programmes. Although this process may provide greater democracy within the ITV system, in that it allows the smaller regional companies more input to the Network schedule, it also implies commissioning-by-committee. If a handful of people assess projects on the basis of 5-minute written submissions, rather than by talking to the film-makers, imaginative and visionary commissioning is unlikely to result.

When Charles Stewart first went to Ethiopia he was commissioned to make a film about desertification - a subject which had no apparently immediate appeal, although the films that followed later won a RTS award for him and Malcolm Hirst. Flexipool tempts programmers to opt for popular subjects that appear to have instant audience-appeal rather than to take risks on difficult, long-term projects.

If all ITV's factual programmes are ultimately commissioned through Flexipool, long-term, quality documentary projects could be the first to disappear, followed soon after by one-off documentaries, in favour of shorter, snappier current affairs and news items. Although ten-minute news bites help to stimulate the audience's awareness and interest in a subject, it would be a great loss if there were not also room in the schedules for more in-depth examinations of the wider issues.

On the plus side, the multi-channel TV system of the future will create a much greater demand for varied programming. If programme makers grasp the opportunity this could open up new transmission outlets for

documentaries and environmental programmes. This has already proved to be the case in the USA on Discovery Channel, Arts and Entertainment and Ted Turner's Network.

But, in the UK, the built-in hurdle will be finance. The thinner spread of advertising revenue across up to 50 channels will inevitably mean less up-front money available to programme makers. If we look at the UK, whatever promise Sky and BSB hold for the future, the funding they have available for original programming in the early years will be limited.

Sponsorship is often put forward as another potential salvation. Clearly sponsorship will provide opportunities for a variety of programme support. But companies are likely to want to be associated with relatively safe or glamorous programmes such as quality drama and the arts rather than politically contentious issues like environment and Third World development which so often are related to the rich/poor divide. We should also remember that sponsorship is another name for advertising and it would therefore largely be drawn from the same limited funding source.

Some satellite broadcasters have asserted that they can produce programmes much more cheaply than the established broadcasters. No doubt they can. But experience tells us that draconian production savings result in flawed output: in programme making, you get what you pay for. It is possible to tell the story of the Amazonian rainforests from a London studio with a backdrop of stills at minimum cost, but to produce a 'quality' programme that reveals the real story set in the proper place involves air fares, accommodation, research, cost of crews and most important of all, staff time - and the budget escalates accordingly.

This principle applies to all areas of programming, as highlighted by BBC Head of Light Entertainment, Jim Moir, in ITV's recent *One Day In The Life of Television*: "There is a cost to quality. You can't make programmes of excellence on shoestring budgets such as is being utilised by the satellite broadcaster. Quite simply, if you pay peanuts, you get monkeys".

In-depth documentaries, especially those made overseas, together with quality drama, will always be among the most expensive programmes to make. If they are to be produced in future, overseas co-production finance will become crucial. Central has long experience in this area with co-production successes such as the *Vietnam* series (Central/WGBH, Boston/Antenne 2, France) and *The Nuclear Age* (Central/WGBH, Boston/NHK, Japan). New US cable outlets like Discovery, Arts and Entertainment and the Better World Society provide other potential co-producers. But the time, effort and inevitable expense that goes into setting up major international co-productions will be beyond the resources of many smaller independent companies.

The continuing ITV audience interest in Third World issues was demonstrated again recently by the massive and moving response to John Pilger's Viewpoint '89 report *Cambodia Year Ten*, transmitted on Tuesday 31st October at the late hour of 10.35pm. The central duty office alone took over 1,000 viewers' calls in the first 24 hours after transmission, and more

than 17,000 letters were received during the following days, with donations of over £44,500. The responses came from a broad spectrum of the public and crossed all political party lines.

With encouragement, television audiences are interested in people living in far away countries of whom they know little. The deregulated television of the future may not afford them that opportunity.

3.2. Competitive Scheduling

By Steve Morrison

Steve Morrison joined Granada in 1974 after graduating from the National Film School. He set up Granada's Northern Documentary Unit and went on to produce and direct in World in Action. He became Head of Granada's Regional Programmes, and subsequently Head of Features and Documentaries. He is currently Chairman of ITV's Factual Programmes including Documentaries, Current Affairs, Arts, Education and Religion. In August 1987 he was appointed Granada's Director of Programmes.

ITV is Britain's main commercial channel. In its lifetime it has been able to combine a viable, indeed profitable commercial existence with a commitment to public service broadcasting that ranks alongside that of the BBC. ITV documentaries, current affairs, arts, education and community programmes have all contributed to the mixed schedule that has served many viewers most of the time and all viewers some of the time.

As is well known, this is now changing. The challenge of the next few years for ITV is to ensure that it maintains its role as a quality popular broadcaster. Quality programmes are expensive to produce and it is vital that the Government recognises this in awarding new franchises. The highest cash bid to the Government could be the worst bid for the viewer, who would prefer the cash spent on programmes - as would the advertiser, who would like to market products in the most attractive possible schedule.

The Committee stages of the Broadcasting Bill may make it clearer how far the ITC, mindful of its 'quality hurdle', will be able to insist on the transmission and scheduling of current affairs and factual programming. Without an imperative to schedule this sort of material in peak viewing time it is likely that the cheaper-to-produce mass market entertainment, the films from Hollywood or lighter domestic drama series, will predominate. ITV cannot be assessed in isolation: the quality obligations on other channels will affect how quality programmes are scheduled on ITV.

In the 'new look' ITV, in the competitive era we are entering, the concerns of the viewer and his appetite for material that is challenging and informative as well as entertaining will give the schedulers pause for thought. The demographic profile of audiences for programmes like *World in Action*, *This Week* and *First Tuesday* leans towards the up-market and male. Environmental issues have become

more urgent and engrossing to large sections of the population and especially to the young. The up-market, male and young are some of ITV's most elusive viewers. They must continue to be served, especially at a time when the new competition is pushing hard to attract the mass entertainment market.

Advertisers continue to favour a quality mixed schedule - high ratings certainly, but not without an eye to particular target sections of the audience.

Competitive scheduling must not bring a race for the lowest common denominator. Competitive scheduling must be allowed to bring about an emphasis on a popular, diverse and quality schedule. A mass terrestrial channel like ITV has a major advantage over small new channels and it should use that advantage by maintaining and investing in a quality schedule. If it stoops to conquer, it will falter.

CHAPTER 4. VIEWING PREFERENCES AND THE EFFECT OF COMPETITION FOR REVENUE

By Professor Andrew Ehrenberg

Professor Ehrenberg is Director of the Centre for Marketing and Communication at the London Business School. The Centre is supported by over 30 leading advertisers, media owners, and agencies. Previously he was Professor of Marketing at the LBS from 1970, has held academic appointments at the Universities of Cambridge, Columbia, Durham, London, Pittsburgh and Warwick, and has worked in industry for 15 years. He was Chairman of the Market Research Society in 1964, a Council Member of the Royal Statistical Society 1966-69, and is on the editorial boards of numerous journals in Britain and abroad. He has published widely on marketing, communication and statistical topics.

Readers of this chapter who wish to pursue a more extended account of how viewers use television and of the economics of the medium can refer to Television and Its Audience, by Andrew Ehrenberg and Patrick Barwise, published by Sage Publications.

Viewers' Demand for Range

A basic feature of television is that people distribute their viewing widely between different types of programme. Few viewers watch the most popular programme, but often choose a lower-share programme. This demand for 'minority-taste' programmes is common to viewers of all kinds.

Viewers spend an average of some 25 hours a week viewing. Table 1 shows how such viewing was recently spread among eight broad programme categories in a typical week. Just over half the viewing time (55 percent in the table) was spent on the categories labelled 'entertainment', and about a third on those generally regarded as somewhat more demanding.

The detailed percentages can vary somewhat from week to week (e.g. the amount of sport viewed varies with the incidence of snooker or the Olympics). But the patterns noted below are in line with many studies of viewing behaviour carried out for the IBA in the UK and for the Markle Foundation in the USA over the last 20 years.

The spread of viewing shown in Table 1 takes much the same form for different viewers. Table 2 illustrates this for social class. There is a gradient of demanding programmes appealing more to the ABC1 social groupings. But it is typically very small: ABC1s 40 percent and C2DEs 37 percent. Just under 40 percent is also spent on the more demanding programmes by younger and older, heavier and lighter viewers, and so on.

some in C2DE em. ?

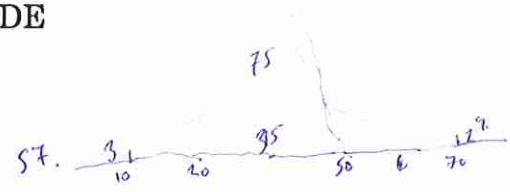
Table 4.1: Viewing of Different Programme Types
 (% of total viewing in week ending March 10 1985, rounded)

% of viewing time spent on:

<u>Entertainment</u>		Totals
Light Entertainment	17%	55%
Light Drama	21%	
Films	8%	
Sport	9%	
<u>Demanding</u>		
Drama, Arts etc	7%	38%
Information	20%	
News	11%	
<u>Children's progs & Misc</u>		5%

Table 4.2: Viewing of Programmes by Social Class
 (London, Midlands, North Western: rounded)

% of time spent viewing:	ABC1	C2DE
<u>Entertainment</u>		
Light entertainment	18%	17%
Light Drama	20%	22%
Films	7%	9%
Sport	9%	9%
<u>Demanding</u>		
Drama, Arts etc.	9%	7%
Information	20%	20%
News	11%	10%



Individual viewers often select different programmes - their specific viewing preferences vary greatly. Thus when Dallas and Dynasty are both shown in a week, some people watch one and some the other; relatively few watch both. But the spread of viewing across the *different programme types* varies far less from person to person. About three quarters of all adults spent within 15 points of the average of (35) percent on the relatively demanding programmes; only three in a hundred spent less than 10 percent of their viewing time on them, and two egg-heads in a hundred more than 70 percent.

This demand for programmes of different types hardly varies even among the viewers of different programmes. Thus viewers of Dynasty did not exercise

an exceptional taste for other soap operas (just a percentage point or two above the average). Similarly, viewers of *Panorama* that week certainly did not concentrate the remainder of their viewing on other information programmes. Those who watched *Dynasty* and those who watched *Panorama* spent roughly 20 percent of the week's viewing watching Light Drama (which includes soap operas). Much the same pattern applies more generally.

There is virtually no special tendency for viewers of any one programme also to view other programmes of the same type. Yet this is not through lack of opportunity. There are more than 30 hours of broadcasting of each programme type, except Drama/Arts and News, as shown in Table 3. Most of this does not overlap on the different channels. Viewers generally have about six times more choice in any programme category than they actually use.

Table 4.3: Hours viewed and hours broadcast

No. of Hrs	Viewed*	Broadcast		
<u>Entertainment</u>				
Light entertainment	6	36	1/6	0.16
Light Drama	8	42	1/5	0.19
Films	5	35	1/7	0.14
Sport	4	37	1/9	0.11
<u>Demanding</u>				
Drama, Arts etc.	3	21	1/7	0.14
Information	8	107	1	0.07
News	4	19	1/5	0.21

*TV tips and news
Drama, Arts etc.
& News are already it.*

* The average of the number of hours of the programme type viewed by those viewing a particular programme of that type. (These figures therefore do not add up to the total hours viewed by the average viewer.)

It is fallacious to deduce that just because we all watch high rating programmes for some of the time, we want to watch these all of the time. Instead, all of us also watch low-rating programmes. Viewers generally watch only two to three of the 'top ten' programmes (with ratings of 10-15 million) in a week. This accounts only for about five percent of their viewing. They spend far more time, about a third of their total viewing, on programmes with ratings of under five million. Yet more - rather over half their time - on programmes with only middle-level ratings.

Even in the evening when rating levels are high, people still spend just over a fifth of their time on programmes with ratings less than five million. And only about half of those viewing at any one time opt for the most popular programme on show. The other half chooses something less popular on one of the other three channels, with one in six viewers (17 percent) choosing a programme with a share of less than 20 percent. All this is again much the same for different population sub-groups. Table 4 illustrates it for social

7% pop. sub. 1

class groupings.

Table 4.4: The Demand for Evening Programmes with Low Ratings or Low Viewing-Shares

	% of evening viewing spent on programmes with ratings < 5 million shares < 20%	
Social Class ABC1	23%	18%
Social Class C2DE	21%	16%
All Adults	22%	17%

A crucial feature of the demand for variety is that minority-taste programmes do not appeal only to the same Hampstead elite, but to different parts of the population. This is implied by the spread of viewing in different population subgroups as just noted. Another well-known illustration is provided by the smaller channels. Thus, 40 out of 50 million people in the UK choose to watch several low-rating programmes on BBC2 each week, for an average of some two hours each. And well over 30 million dip into Channel 4 for an hour or more.

Many low-rating programmes broadcast in the UK are not cheap to produce or even to acquire - an average of £200,000 per hour for home-produced drama, some even more. (To put this in perspective, most feature films cost between £2 million and £10 million to make; their popularity largely stems from their high production values). But low ratings of only two or three percent of the population still represent enormous audiences - say a million or so viewers. Hence even drama averages out at only five pence per viewer. It is not a case of requiring cross-subsidies of the 'Covent Garden Opera' type costing £10 per viewer for a privileged audience of only 10,000.

As in any enterprise, some cross-subsidies are required. But in television it is not a case of the many subsidising the few. We all tend to watch a selection of high and low cost, and high and low rating programmes.

Broadcasting minority-taste programmes allows people to choose their individual selections of programmes for substantial parts of their viewing time. That choice is not forced. Even without all the extra channels that are now coming, during the main viewing hours we almost always have two, and often three, less demanding alternatives, and one half of the population already has a video recorder.

The range of broadcast programmes offered to the public is partly dependent on national resources, and partly on political will and funding policies. In the UK, the BBC and the independent channels broadcast a larger number and wider range of the more 'demanding' programmes than, for example the US networks. The UK split of entertainment versus demanding broadcasting hours in Table 3 is roughly 50:50. For the US networks, a roughly comparable split looks like 65:35 with most of the 35 percent being just

news. A British demand for a range of programmes clearly exists as the UK hours of viewing (see Tables 1 and 2) split 60:40.

Competitive Spot Advertising and the Squeeze on Range.

Paid-for advertising competing for limited revenue tends to exclude low-rating or low-share programmes. In particular it excludes ones that do not have a high rating *potential*.

This pressure on the range of programming does not occur with other forms of paid-for advertising, such as block advertising, or spot-advertising when there is ample revenue, or advertising in segmented markets.

The national press, for instance, is highly segmented. As a result, very varied papers can generally survive. The 'quality' papers like *The Times* and *The Guardian* which have over 80 percent ABC1 readership, can command very high 'costs per thousand' advertising rates, and are in fact largely paid for by their advertising revenues rather than by their cover price (70 percent: 30 percent). The 'popular' press like the *Sun* and *Mirror* have only a 20-25 percent ABC1 readership, relatively low cost per thousand rates, and are paid for far less by their advertising than by their cover price (30 percent: 70 percent). Problems arise specifically with TV spot advertising (in breaks within and between programmes) when companies compete for advertising revenue.

As we have seen, audiences of different TV channels or programmes are largely unsegmented - audience profiles vary relatively little (usually by less than 10 percentage points) by demographic or other factors. With competitive spot-advertising on different channels, a 10 million audience therefore tends to bring roughly 10 times as much revenue to the TV company as a one million audience. Hence each channel's income essentially varies with the audience size of each programme it shows. Irrespective of what advertisers might want by way of targeting, which television cannot usually supply, sheer audience size and 'cost per thousand' are in practice the proper yardsticks.

Hence when choosing between broadcasting a programme which, if well done, can get an audience of 10 million viewers or one which can at best obtain only one or two million, channel controllers on commercial channels tend to opt for the former. This squeeze on the 'certain losers' occurs even though there is a substantial demand for these programmes from the audience and they are good value for money at only a few pence per viewer.

The potential winner may not actually get a high rating - that would depend on its scheduling and on how well it was made. But it was judged to have a potential of 10 million viewers. The 'certain loser' with its maximum audience of only one or two million has already been squeezed off the schedule. If the potential winner does not do well enough, it tends to get dropped and another potentially popular programme, usually of the same type, is tried out instead. This occurs on the US networks whenever income forecasts are not being attained. The pressure to exclude 'certain losers' from the programme

schedule is much greater if there is a shortfall of advertising revenue, which is then used to legitimize the emphasis on ratings potential.

ITV has escaped the more extreme pressure on programme range in recent years just because there has mostly been 'enough revenue'. The IBA's explicit programming guidelines and worries over franchise renewal can then work. Each channel has to screen a number of 'certain losers', and knows that it cannot maximise its audiences all the time. But in near-bankruptcy situations the guidelines have not had enough bite, as shown by TV-am's recent history, and by ITV in the late 1950s.

Without competitive spot advertising a revenue shortage need not affect the range of programmes. So in the past there was no great pressure on the range of programmes on Channel 4 (while it had a fixed subsidy), or on the BBC (with its fixed licence fee income). In contrast, the pressure on programme range becomes still fiercer when two or more channels with spot advertising compete directly for the same limited or insufficient advertising revenue. If one channel always aims at the highest potential ratings, any competitive channel which does not also do so will see its ratings and income decline.

The conflict between viewers' and advertisers' requirements is not because servicing the former is do-goodish or lacks a commercial edge. Instead, there are two different markets: one for advertisers and one for viewers. Given the largely unsegmented nature of TV audiences, the advertisers are concerned that the programmes in which their commercials are shown should maximize the number of viewers. Viewers' concerns, on the other hand, are with all the different programmes which they watch: are there enough that are good or at least passable. Except for being able to talk about it afterwards, a viewer is not concerned with how many other people watch each programme. W.M.

The two markets agree over top-rating programmes: both advertisers and viewers are happy with these. But advertisers are not keen to have bought into a break which has a lower rating than it might have had. Viewers, on the other hand, are not concerned by low ratings as long as they themselves quite like the programme.

Final Comments

The insights into the television audience set out above were first developed as a central component of the BBC's successful defence during the Peacock enquiry of 1985 against the imposition of advertising. I looked then at the effect of a ratings war on programme range and quality.

The arguments, based on real market behaviour, apply equally well today when the dangers of ratings wars are again being unleashed, this time by possibly having a competitively-funded Channel 5, a Channel 4 selling its own advertising air time, and some new, but perhaps very small, advertising-funded satellite channels. Ratings wars come from airtime being sold to advertisers rather than being paid for by viewers.

A relaxation of controls on the range and quality of programmes is against the interests of viewers who will watch a wide range of programmes if they are made available.

It is also against the expressed interests of advertisers. For this complex market does not work to their best advantage when it is left uncontrolled, as this leads to fewer quality programmes and less audience satisfaction. Economists generally accept that in an imperfect market, some extra care and intervention is greatly in the consumer interest.

Without such care, the laissez-faire approach to the market that was first proposed in the Broadcasting White Paper and which still partly survives in the Bill (such as its central theme of competitive tendering for franchises) will lead to many minority-taste programmes being squeezed out of the broadcasting schedules. This will be the case whether the programmes are about some viewers' idiosyncratic interests such as stamp collecting or gardening, or whether they are about cultural, scientific or Third World issues. This squeeze in lower rating programmes will take place not only for the advertising-funded channels but, to some extent, by competitive knock-on effects, even for the BBC.

CHAPTER 5. THE NEW TELEVISION ENVIRONMENT IN BRITAIN FOLLOWING DEREGULATING LEGISLATION AND THE NEW MEDIA

5.1. Pressures on Television Funding in the Nineties

By Patricia Hodgson

Patricia Hodgson is Head of the BBC's Policy and Planning Unit, a department co-ordinating editorial and strategic policy development and bringing together the BBC's main research and information services: its Broadcasting Research Department, Secretariat, Registries, News Information, Libraries and Data Services. From 1985 to 1987 she was the Secretary of the BBC and before that the Deputy Secretary. She was previously a producer with freelance journalistic interests.

Will new and more commercial operators increase the total market for broadcasting, bringing extra choice to that market, or will they attract audiences and funds away from existing providers and displace the quality and choice which was successfully created by public service systems? The answer depends on both structures and funding. I will look successively at the two parts of the commercial television sector and then at the public channels which are to keep public service obligations.

The Popular Commercial Networks (Channels 3 & 5)

Quality, in the sense of the slickness and high production values of popular, middle-brow entertainment will be maintained on the popular commercial channels of C3 and C5, but demanding programming, such as documentaries, will suffer.

The majority of the population is available to view at peak time. This is true for all ages and social groups. The best programmes for this purpose are ageless and classless. They must be entertaining and excellent of their kind because the greatest competition is concentrated on these channels and hours. But peak programmes should include no shocks, risks, threats or surprises and make no heavy demands on the audience.

Different kinds of programming can, of course, be shown off-peak, depending on the availability of groups within the audience; cookery and chat shows for housewives during the day, youth programmes late at night, financial news in the early morning. But these are small, specialised audiences and companies will avoid spending too much money on programmes specially for them.

Mainstream, but more demanding, programmes such as documentaries, science features or the serious end of music and drama, will become luxuries; too expensive for off-peak scheduling and, while appealing to all groups, not quite popular enough for peak time.

As competition from new operators increases, so these pressures will increase. The audience will be well, but blandly, served in peak time. Range, risk and innovation will be squeezed. Minorities may suffer.

Regional interests will be protected on Channel 3, as the ITV franchises continue to be granted on a regional basis. But as LWT's Greg Dyke has said, it will no longer make sense to pay for children's or religious programmes on ITV. The presenter of ITV's mainstream and only arts programme, *The South Bank Show* has said it may fold unless a sponsor comes forward with £1m.

Efficiency, of course, will improve because it has to. Advertising revenue is unlikely to increase as fast as the number of extra hours to be filled. Channel 5 alone will double them. Broadcasters will become more efficient, whether in production or scheduling. There will be more bought-in programmes and repeats.

New Operators: Cable/Satellite/MVDS

The cost of breaking into an established market and, overnight, providing hundreds of hours of additional programming, means that successful new operators must rely on introducing a whole new dimension of efficiency to the market.

But however efficient new operators are, and however hard they struggle for a share of the advertising market, they cannot hope to raise enough from advertising to fund significant new production. First, they do not reach every home. Fifteen years into a successful, diversified market in the United States, just over half of American homes take cable services. Between them, these new services command one third of viewing in cable homes. One third of a half, split several ways, is a small share of the market. *of all USA.*

The result in the US is that new channels tend to be either down-market entertainment, based on bought-in shows and popular repeats, or focused on AB, high spending audiences such as the Arts and Entertainment Channel or the Discovery Channel. These, too, rely on repeats and bought-in programmes, often from overseas public service channels. In its early years the Arts and Entertainment Channel was one third BBC programming. Now in its sixth year, it is co-producing probably only three hours of new production a week.

Balance the Arts Channel in previous chapter.

New operators bring the convenience of targeted life-style channels with 'a chance to see' good programmes that might have disappeared into the archive or been confined to overseas situations. The demand for material will lead to

many more shared deals between channels and co-productions between countries.

Syndication, sales and co-productions will be the order of the day. In Europe, the Directive is now in place and the framework for cross frontier sales and co-operation established. A number of initiatives, like Eureka, will underpin Europe's efforts in the world-wide market. Of particular importance is the practical help for programme makers developing as part of the European Audiovisual Initiative. All will support the growing market.

But new cable and satellite channels are not going to invest in a great deal of new production. They need solid, established production bases elsewhere to feed off. We will much appreciate the advent of 24 hour news on cable and satellite -- a real public service. But this is usually a loss leader unless it can establish an international market as CNN from the States has done. There is not room for many of them.

In addition to 24 hour news, and the considerable convenience to broadcasters of re-packaging and recycling, the new operators introduce a new source of funding into broadcasting subscription.

Films, events and sports channels bring an extra dimension to the market, offering premium material to small audiences (so that rights are not crippling); material that is so highly valued that people will make premium payments to receive it. After only five years, Canal Plus is the most profitable television channel in France, and is investing significant monies in the French film industry. It is also crossing frontiers, developing new business in Belgium, Spain and Germany.

It seems likely that subscription will be an important fresh source of funds for the UK industry. But experience in France, South Africa and the States is that successful subscription channels need to be scheduled round premium material, usually films. That is the route Astra and BSB are taking in Britain.

Given these characteristics in the commercial sector, what need will there be for something else in the market-place? In Britain, I believe, there is a fundamental need. The commercial channels will need a public service foundation or a very great deal will be missing from future choice.

Public Service Networks: BBC1, BBC2, Channel 4

At present, and into the mid-1990s in Britain, BBC1, BBC2 and Channel 4 will, fortunately, be there to offer a shared national experience: BBC1 and 2 with complementary schedules offering a varied package of mainstream output; Channel 4 with its special remit to introduce new ideas and voices.

As competition and greater choice fragments audiences, the cultural sheet anchor of a national service has an important place. In its troika of purposes, "to inform, educate and entertain", the BBC emphasises, in

particular, the news and current affairs function; its responsibility to make reliable news and balanced comment available regionally, nationally and internationally, at convenient times and in popular (e.g. Radio 1) as well as demanding formats. Serving this range of outlets means the BBC can achieve a critical mass in resourcing news-gathering at all levels. It observes international as well as national news values. Regular, reliable news and comment has a vital contribution to make to the democratic process.

Public service also requires that many voices have access to the screen. In Britain, Channel 4 has a special remit to innovate and introduce new voices to television. For the BBC, a range of voices is vital to its role. The BBC must enable the nation to speak to itself, whether in entertainment, information or cultural programming, drawing on all sections of the community and serving all tastes.

Continued investment in national production is the key to these choices. We have seen how pressure on funds in the 1990s will lead to more bought-in material, trans-cultural co-productions and repeats, and to a reduction of range, particularly to fewer documentaries, serious music and drama and fewer innovatory programmes. The best guarantee of the traditional richness of public service television is protected channels, with a guaranteed income to invest in national talent, and in maintaining the critical mass of production talent.

Range and choice is, of course, meaningless unless it is easily available. It depends on a varied schedule, and on the viewer's availability to watch, which is likely to be at peak time. We know people enjoy a mix of programmes on their favourite channels. The new, focused channels, when they are successful, will command perhaps a third of viewing time in the average home. But most viewing will remain with the networks, enjoying mixed schedules based on original production. Public service networks will be distinguished by the range they can schedule at peak time.

Availability is crucial: the BBC reaches 99 percent of the population on terrestrial transmitters. New broadband cable systems, offering the convenience of a package of channels on one cable, (no aerials or dishes needed) are required by law to offer BBC and IBA services within that package. It is not clear how long this will continue.

In the 1990s we will see microwave delivery systems (MVDS) offering the similar convenience of packaging between 10 and 40 channels for delivery to a single dish aerial. It is certain that transmission systems are changing fast. In 10 years' time, many homes may rely on MVDS or cable. So long as BBC1 and Channel 4 offer something valuable and different, complementing the range of commercial channels, they should be part of these packages and available to all. MVDS and cable 'must carry' these public service channels if we are to guarantee real choice to the total audience in the years ahead. The Government has described BBC services as the cornerstone of British broadcasting. If the cornerstone is removed from these new delivery systems, the building may be endangered.

Funding the Television of Tomorrow

When trying to predict the future, and the characteristics of the main players in broadcasting, it can be seen that they all can bring something worthwhile to a wider market. But can we afford them all? What will the audience decide?

Let us first consider commercial revenues: last year, in Britain, gross advertising revenue was around £2 billion and video sales and hire contributed £628 million, or nearly a quarter of all commercial funding. If we compare that with revenue in the United States, we see two things: that advertising is larger in total (at £29 billion) than can be accounted for, pro rata, by the larger economy, and that direct payment has plenty of potential.

In the US video hire, basic cable payments and subscription television bring in nearly half available revenues. If direct payment increases here over the next few years, we could find that more than half the market is funded by the audience paying directly for what it watches, either through subscription, video hire or the licence. This would be a solid basis for original programming, for range and for quality. People will only pay for what they really believe is worth having.

Will that apply to the licence fee? At the moment 95 percent of the audience consistently tunes into the BBC. At one quarter the likely subscription for Sky's film channel, two television networks are available with original British productions, four radio networks and regional and local radio.

In 1924, Sir John Reith made a contract with the national audience: "The BBC's role", he said, "is to bring the best of everything to the greatest number of homes". Whether the BBC continues to fulfil that contract is, finally, a value judgement made by the audience in its role as viewer and voter. There can be no better foundation for public service.

5.2. A View from the Independent Producers

By Paul Styles

Paul Styles is the Director of IPPA, the Independent Programme Producers Association. IPPA negotiates, advises and informs on behalf of its 700 member organisations with Government, broadcasters, the unions and other bodies. IPPA has led a successful campaign for 25 percent access by independent producers to all UK channels. Paul Styles has worked as a Management Consultant for the National Council for Voluntary Organisations, as an economist for Leeds City Council Industry Department and as Director of the Joint Board of Film Industry Training (JOBFIT).

The 'New Media', satellite, cable and microwave are essentially distribution technologies, different ways of receiving a signal. But their impact on the

coverage of global issues could be considerable. We have lived through an era of spectrum scarcity, because terrestrial television - Channels 1 to 4 - is supplied through a system, the UHF network, that cannot be expanded much further. Successive governments have regulated this spectrum partly because, as a scarce resource, they have to make it as freely available as possible to the general public. But there have been, as far as independent producers are concerned, major negative factors. The BBC and ITV are seen as state-licensed monopolies acting as a barrier to alternative supply sources and competition.

'Deregulation' is shorthand for a series of issues that have all converged at the same time. There is an ideological climate in the world of broadcasting which argues that as spectrum scarcity ends, the need for the regulation of existing channels diminishes because there are now the alternative supply points of satellite and multi-channel cable.

These new technologies of distribution have taken off in countries where there has been a weak UHF network, as in the United States, or where there have been conflicting means of programming brought about by multi-language cultures in Europe. The big question is whether any of these new technologies will make great headway in Britain, which has to date had a very high quality television service and which has managed to marry the traditions of public service with a degree of popularism which is unusual elsewhere in the world.

The real issue about ideology and technology is the effect that both have on the economics and pricing of television. In the stable television environment that Britain has traditionally enjoyed we have expected our television to be paid for via a universally applied licence fee which, as the BBC points out, is very good value when one compares it to subscription services or spot advertising on ITV.

British television now costs about £2.5 billion a year to produce. If we are to have more television, the question is how extra money can be found, or whether money currently employed in television should be redistributed in some way. More television does not necessarily mean better television.

The number of channels being made available by cable, by satellite, and later, in the medium term, by microwave will lead to a proliferation of TV stations. We are beginning to see the early signs of this with Sky and BSB. Most of these new channels will have to fight very hard to survive, but some clearly will. Television resources are finite and advertising revenue will be spread more thinly around more channels. One consequence is that re-run television and bought-in material from other countries will be re-introduced into British television.

The drop in revenue will reduce the price per hour available for new original programming. The kind of programming that covers Third World and environment issues is relatively expensive: not as expensive as glossy dramas but certainly not as cheap as studio-based chat shows. It is expensive because this type of production needs careful planning and research, using

dedicated professionals to follow up the work either in this country or overseas. These programmes are in the medium price range for television. They do not attract very large audiences, though there are some exceptions to this. Some of the early evening BBC nature programming and some current affairs programmes hold their own extremely well compared with populist light entertainment programmes. It is a myth that environment and Third World programmes are middle class, elitist, for the educated only and not watched by the general viewer.

Concern must focus on whether there will be enough money to keep a vibrant and new form of Third World and environment television on our screens. There is some doubt about this. BBC1 and 2 and Channel 4 will continue to have strong public service remits but it is likely to be much more difficult to persuade commercial television entrepreneurs on Channel 3 in particular to invest in this kind of programming if they have had to pay heavily for their franchise.

The new media are much less likely to commission programmes on the Third World and environment as first-run material; they are likely to take it for second and subsequent runs, enabling exposure to a group of people who would otherwise probably not watch this kind of programming. Independent programme makers need to be sensitive to this, and should make sure they have the necessary rights to the programmes they make for the terrestrial broadcasters so they can sell on to the new media.

Many of the programmes of the successful US pay cable systems, particularly Discovery and National Geographic, originate from the world of public service television systems. As US cable systems have become more successful they are now investing directly in making their own programmes. The Government's plans for the BBC and Channel 4 will ensure that a limited public service tradition will be maintained to provide such programmes.

We must argue now for a broad range of programme types to be available on all terrestrial services that are freely available over the air. This range must include Third World and environment programmes. The Government has conceded the case for some protection. It has described the BBC as the cornerstone of broadcasting and has restated Channel 4's remit from the 1981 Broadcasting Act.

It is less clear what effect the economic changes in television pricing in the 1990s will have on BBC1, BBC2 and Channel 4. In the worst case there will be a slow attrition of viewers and a slow attrition of the revenue available to these channels. The issue of the BBC's regulation will not come up until the licence is reviewed in 1996. But regulation needs to be underpinned with a sound financial base.

Channel 3 should be encouraged to carry a broad range of programme types, and this requirement should be built into the auction process. Otherwise budgets will be squeezed, including those of demanding programmes such as Third World and environment material.

Channel 4 is a publishing channel which obtains all of its programmes either

bought in from ITV or from independents who make over 50 percent of Channel 4's original output. During the 1980s, independent producers, many of whom were trained by the BBC and ITV, set up their own small businesses making programmes. These people are probably form greatest collection of independent documentary makers in the UK. They have won awards for all the major areas of programming, including for Third World and environment programmes. For example, a programme like *Animal Traffic* on Channel 4 was made by a two-person independent production team who spend most of their time in the Third World.

Most independent producers believe in public service television and a regulated environment. They also believe in fairer competition enabling new voices to be heard in Television. The notion that only those in public service documentary traditions are somehow able to communicate to the mass of the population on matters to do with Third World and the environment has to be challenged. There has to be a mix of in-house producers and the new generation of independent producers. This will be assisted by granting the independents 25 percent access to the BBC and ITV. A new voice is also emerging from the video culture, brought up on a diet of TV forms that traditionalists find very strange and threatening. Third World and environment television should be made by all these groups. A balance has to be struck.

There is a concern that with declining amounts of money available to produce documentary television, independent producers will be squeezed and unable to survive as businesses. We are encouraging independents to form their own internal alliances to strengthen their company structures. They will have to form new forms of cooperative programme-making and fund raising. Nevertheless, specialist documentary makers are a vulnerable species and everything will have to be done to make sure that they have the available resources.

We need to campaign collectively for a broad range of programme types to be made available on all terrestrial systems. We should be wary of the slow attrition to the financing of the BBC and Channel 4 in the 1990s and we should be vigilant that Channel 3 is regulated to ensure that there is a broad range of programmes available there too.

CHAPTER 6. THE INTERNATIONAL TELEVISION INDUSTRY

By Carol Haslam

Carol Haslam began her broadcasting career in Ethiopia while travelling through Africa. On returning to Britain she spent 10 years as a producer/director for the BBC before joining Channel 4 as its first Commissioning Editor for Documentaries. In 1986 she became Director of Programmes for the new satellite venture Super Channel, and in 1988 took up the post of Managing Director at Hawkshead.

There are three main trends in the international television industry. *Deregulation* - the regulatory structures that govern the operation of broadcasting are changing in many countries. There is a move away from centralised, government-owned bureaucracies to multiple ownership, mixed forms of funding and lighter controls on content. *Commercialisation* - deregulation has inevitably led to more commercially-orientated services, not only for the new privately-owned channels relying on advertising revenue, but also for public service channels which have been forced to compete for audiences by popularising their own schedules. *Internationalisation* - the expansion in the number of channels and in total transmission hours has not been accompanied by a commensurate increase in funds for producing new programmes. The result has been a massive increase in programme 'trading' in the international arena. Programmes of all kinds are bought, dubbed, sub-titled, re-edited and re-packaged to fill schedules and to attract audiences. Expensive programmes, including high quality documentaries, can rarely be funded solely by one broadcaster. Raising investment finance, setting up co-productions, finding co-funders can now take considerably longer than actually making the films.

There have been dramatic changes in broadcasting on the continent over the last five years. Horizons Media International, which analyses the programme output of all the main continental European channels and traces the effects of deregulation on schedules and programme imports, has monitored these changes. In Autumn 1988 they published their analysis of data collected late the previous year. This showed that, in one short year, the move by public service broadcasters to popularise their schedules had begun in earnest as they faced increasing competition from commercial rivals. It had also led to a steady rise in the volume of imported material, particularly from the United States.

France

In France the old structure of broadcasting - three heavily regulated state-owned channels - has completely changed. The biggest channel, TFI, was privatised in 1987 and sold to a consortium led by a building magnate. This immediately shifted the objectives of the channel and produced a very different entertainment-based schedule. In its first year the newly privatised

TFI dropped all documentary and education programmes, previously accounting for 15 percent of output. American imports such as *Santa Barbara* and *The A Team* accounted for nearly a quarter of the peak time schedule.

One effect of this more commercially-orientated service was to drive the other main channels, A2 and FR3, to compete for audiences by altering the balance of their output as well. FR3 increased the entertainment proportion by 16 percent in primetime, increased the 'soap' content from 5 percent to 20 percent in one year, and at the same time cut news and current affairs by more than a third. A2 moved more cautiously in the same direction but not quickly enough to prevent a large drop in audience ratings. As part of their survival strategy, in December 1989, A2 and FR3 appointed a joint head to ensure complementary programming between the two networks. The overall proportion of factual programming is expected to drop yet further.

Of the three new private channels, Canal Plus, La 5 and M6, only Canal Plus, a subscription channel, has become profitable, and then, it has been suggested, only after a decision to transmit soft porn movies late at night. It does, however, include a small amount of documentary material - mostly co-produced travel and adventure films. The other two private channels are almost entirely popular drama, variety, music and game shows, but so far they have not proved profitable and are still losing large sums of money each year.

Germany

In Germany the two state broadcasters ARD and ZDF are being forced to shift the balance of their output in order to compete with the newer, privately owned commercial channels which are free to schedule as much light entertainment as they want. The main regionally-based public service network, ARD, already has about 40 percent of its schedule devoted to movies, but in the first half of 1989 it was losing 20 percent of its early evening audience to competitors. This has had two major repercussions: first, the network has been forced to lower its advertising rates, thereby generating less funds for new programme production; second, it is altering its schedule to include more soaps and other mass appeal material. ZDF has already moved down this road; in 1987 about a quarter of its schedule consisted of soaps, and this proportion is growing together with more quizzes and game-shows. On both channels this trend will mean less news and current affairs and less documentaries.

It is the growing success of their main competitor, RTL Plus, that is the chief cause of these changes, as well as the increasing availability of satellite and cable channels. The RTL Plus schedule in 1987 included 58 percent movies and 14 percent factual programmes of which only three percent did not fall into a news and current affairs category. 42 percent of its output was imported entertainment. The most popular satellite channel, SAT 1, in the same year had 64 percent of its prime-time output imported from the USA. One of the main growth industries in Germany has been low-cost, and often low quality, dubbing of films and dramas into German.

Italy

France and Germany lag behind Italy, which had the first deregulated industry in Europe. The result has been a kind of television anarchy with literally hundreds of channels starting up, mostly at local level. However, the emergence of the Berlusconi empire as a formidable international force in commercial television has led the state broadcaster, RAI, to take a serious look at all its three channels. Between 1986 and 1987 on RAI 1 there was a dramatic shift to entertainment. Scientific documentaries of various kinds, previously an important part of the schedule, disappeared from the prime-time output. On RAI 2 the proportion of sport went up but the only factual programmes were news and current affairs. The only channel with a significant proportion of 'serious' programming is RAI 3 (14 percent of the schedule) but it found the need to treble the amount of police dramas in one year.

The three main Berlusconi channels, Italia 1, Rete 4 and Canale 5, have an almost entirely entertainment-based output. 97 percent of Italia 1 was 'soaps', action drama and movies. The RETE 4 schedule was divided almost evenly between movies, dramas and light entertainment shows with no factual programmes at all. Canale 5 had only four percent factual output, all news and current affairs.

Scandinavia and the Lowlands

This is discussed in the earlier chapter.

The story in Northern Europe is gradually moving in the same direction. The heavily controlled, rather serious-minded television of most northern countries is being boycotted by many viewers, particularly young ones, when they have an opportunity to tune into the new commercial channels with non-stop entertainment. With a high penetration of cable and a growing number of pan-European channels delivered to cable operators by satellite, the range of choice in many homes is expanding fast. There is still a clear preference for home-grown entertainment, but where this is missing many viewers prefer imported programmes to the more boring output of their own national channels. This has led most of the Scandinavian countries, as well as Belgium and the Netherlands, to licence new commercial channels in their own languages, to relax the controls on public service stations and to increase the volume of acquired or co-produced material in their schedules.

For example, in Sweden between 1986 and 1987 the national broadcaster doubled the amount of drama on the first channel's prime time and cut documentaries and education by 20 percent. The second channel cut factual programmes from two-thirds to 45 percent of transmission time, cutting more serious programmes back by a third and reducing news by half.

Australia

Outside Europe the pattern is similar. For example, in Australia, the three big commercial networks, Seven, Nine and Ten, have been waging a fierce war for audiences and for revenue. This has led them to poach the best

engineers, technicians, producers and presenters from ABC, the government-owned public service station, originally modelled on the BBC, and also to outbid the public broadcaster for imported drama, movies and, most important in Australia, sports coverage. ABC's audience is down to 10 percent and it is in constant negotiation with government for more funds. In the meantime, competition between the big networks has led them into severe financial trouble, causing changes of ownership, enormous staff redundancies and programme cuts. Funds for high quality, home-made drama and documentary are extremely tight and they almost always require external partners.

United States

In the United States, the enormous proliferation of channels, distributed by cable and satellite as well as terrestrial transmission, means that some cities have up to 100 channels to choose from. Accordingly, the three main commercial networks ABC, NBC and CBS have seen their audience share drop from 89 percent to 68 percent in 10 years. Ratings wars have driven all of them to compete for mass audiences and to drop any minority interest programmes.

PBS, the public service network, has retained a small but loyal audience share for its more up-market schedules, but it is in a constant state of financial insecurity. It can take an average of three years to get a major project off the ground by finding co-producers and corporate underwriters.

The real success stories have been some of the specialist cable channels, CNN, MTV, HBO, Disney and fastest growing of all, Discovery, the documentary channel. These rely primarily on subscription revenue rather than advertising, and most families want a package of services that covers all their interests - movies, sport, music, news, education - similar to having a full array of books in the house. This puts pressure on the main general services which want to attract wide audiences with mixed schedules. They therefore move away from special interest programmes aimed at particular audiences.

The Impact on Documentaries

If Britain *were* to follow the trend set elsewhere, the prospect for documentaries is not promising, particularly expensive ones requiring international shooting.

There are, however, still sizeable audiences for films that are visually exciting, have pace, include few talking heads and take viewers into exotic worlds they could not visit for themselves. Into this category fall natural history, travel, adventure, exploration, description - all the kind of material that in the print medium is labelled 'National Geographic'. The advantage of this sort of material from the distributor's point of view is that it travels well across language barriers, has a long shelf life and does not date too quickly - and, most important, still attracts good ratings.

Analytical or polemical documentaries, however, will be increasingly difficult to get off the ground and to sell, particularly if they focus on one particular country or issue. This will include most kinds of political, historical, social and environmental films - unless they are exceptionally visually exciting. International distributors and programme schedulers will avoid programmes that can be seen as depressing or worthy, or make the audience feel uncomfortable or guilty; this would inevitably include films on issues like Third World poverty, inequalities in trade and labour migration, conflicts between development and environment imperatives - all the issues that are likely to shape international politics in the next century.

It would be tragic if Britain follows the trend set by the rest of Europe at a time when there is a growing public awareness of international issues and environmental matters. One conclusion is that in so far as these issues will be covered at all it will be by news and current affairs programmes, but these too will be subject to the same mass-market pressures. There will continue to be a few films made on international issues, particularly if they are co-produced or funded by foundations or UN agencies, but scheduling pressures will mean their chances of being viewed by more than a very small, committed audience are slim.

CHAPTER 7. COUNTRY-SPECIFIC EXPERIENCES

7.1. Italy

By Dr Julian Petley

Dr Petley lectures in cultural and media studies at London University, Goldsmiths College, Brunel University and The City of London Polytechnic. He is a regular contributor to The Listener, Broadcast, Sight and Sound, The Independent and The Guardian. He is a member of the editorial awards of The Screen and the British Journalism Review.

In 1976 the Italian Constitutional Court declared that the state broadcasting monopoly hitherto enjoyed by RAI (Radiotelevisione Italia) was valid only at the national level. From henceforth, local, private, de-regulated television stations would be permitted.

At first this move was widely welcomed. RAI's prestige had never been especially high, and many regarded it as politically compromised. The press, rather than regarding private television as a competitor for advertising, itself entered the broadcasting field. Numerous political groups saw their opportunity to set up a whole network of alternative broadcasting, infused with a high political content, while intellectuals hoped for a cultural explosion on television. These ambitions were soon dashed.

At first there was a mushroom growth of some 800 companies so that, by the end of 1979, 80 percent of all advertising revenues were flowing into three private 'networks'. These were in breach of the spirit of the law, which forbade private networks. However, numerous companies forged links with each other and 'synchronised' their output. Programmes were delivered to stations in videocassette form by fleets of couriers, and then transmitted almost simultaneously in different parts of the country.

The three main networks were Rete 4, Italia 1 and Canale 5. This last was owned by property magnate Silvio Berlusconi, who took over Italia 1 in 1983 and Rete 4 in 1984. The main competition in Italian television now takes place between RAI, with its three channels, and Berlusconi's Fininvest.

In May 1983 the private television stations notched up a market share of 53.3 percent, beating RAI for the first time. Over the three previous years RAI's market share dropped by 17 percent. In recent years RAI has made a slight recovery: in 1988 its share was 47.4 percent compared to Berlusconi's 37.4 percent, and the other networks' 15.2 percent.

It is instructive to compare the outputs of RAI and Fininvest in 1987:

	RAI	Fininvest
Light Entertainment	51%	90.4%
Cultural Programmes	22.6%	4.9%
News & Current Affairs	26.4%	4.7%

Clearly, there is a huge disparity in terms of the types of programmes broadcast by both organisations. But what has been the effect of the competition on RAI's programming?

First, it has forced RAI to lengthen its programme day. In 1974 RAI broadcast 5,000 hours of television: in 1987, 15,900. In itself this may be no bad thing, but initially at least, this lengthening of the schedules took place without any proportional increase in budget, and at a time when inflation was eating into the licence fee. Furthermore, RAI, unlike its competitors, has to limit its advertising slots to five percent of total transmission time. This resulted in RAI making savings in programme costs by relying more heavily on imports and cutting down on expensive 'quality' programming. It should also be noted that the vast amount of advertising now shown on Italian television - 60,000 slots annually on RAI and 284,800 on Fininvest - has had a serious effect on the ailing national newspaper industry.

Second, competition has caused an increase in the importation of cheap programmes by all the channels. Already by 1980 Italy was the largest importer of Japanese programmes, and by 1982 it was the largest importer of American ones. Competition for programmes led to price rises - in some cases of up to 100 percent. Recently, in fact, imports from North America have dropped in number, but the gap has been filled more by imports from elsewhere in Europe than by home-made products. In 1987 RAI and all the private networks still spent 62.5m on cinema films and television movies made in Hollywood. As Donald Sassoon remarks in *Hollywood: the Advent of Private Broadcasting*, "a country with a major artistic and cultural tradition which has made a significant contribution to the cinema has a broadcasting system which is increasingly like a huge network of terminals transmitting programmes produced in and around Los Angeles". The extensive availability of films on television has helped contribute to the steep decline in cinema-going in Italy and to the consequent closing of large numbers of cinemas.

Third, there has been a large increase in the amount of varied informational material available on television. Far from being an indication of an increase in 'quality' television this, in fact, points to an increase of what in America is referred to as 'infotainment' and in Britain as 'tabloid TV'.

News is an area in which RAI has something of an advantage over the private networks which are not allowed to broadcast live. But news has become an increasingly market-oriented genre, and professional journalistic standards have suffered in the process: Mauro Wolf reports in *Italy: from*

Deregulation to a New Equilibrium, "information programmes are now presented in a far more spectacular way, particularly in (RAI's) 'télé-verité' slots such as *Yellow Telephone*, *I Confess*, *Public Prosecutor*, etc. This tendency is an obvious consequence of the need to pull in the audiences for journalistic programmes, which, if presented in a more traditional and therefore perhaps more scrupulous and less spectacular form, might be thought dull and unlikely to appeal to large audiences. From the point of view of the institutional obligations of a public service television system, however, this penchant for spectacular modes of presentation is potentially harmful both to journalistic standards and to the development of national civic and political culture".

The arrival of the unregulated private channels has created a climate in which close attention is given to the ratings. To quote Mauro Wolf again, "this creates a climate in which it is objectively very difficult for public broadcasting to maintain the standards and purposes appropriate to it without succumbing to the pressure of competition". One example of this might be the 'star factor' which now attaches itself to a handful of journalists with high ratings appeal (and consequent high salaries). Stories about their rewards, and their movement from channel to channel are themselves highly newsworthy. Indeed, the Italian press dubbed 20 March 1987 'Black Friday' for RAI, because of the defection of its top presenters Pippo Baudo and Raffaella Carrà to Berlusconi.

Similarly, the fate of RAI 3, the supposedly cultural, regional channel is instructive. Long thought of as the 'Cinderella' channel, RAI 3 suffered from RAI 1 and 2 monopolising as much of RAI's resources as possible in the battle with Berlusconi. Audiences were low, but between March 1987 and 1988, viewing figures trebled. The station's new head, Angelo Guglielmi, suggests the cost at which this revitalisation may have been achieved: "When I started, TV3 was like a school textbook. Today it is a crisp, daily newspaper. We put aside the classical concerts, the books, the theatre, because we did not want to cater for minorities, and we went out to try and hook the overall audience".

It seems clear that the arrival of private, de-regulated television in Italy has done nothing positive for decentralisation, political pluralism, freedom of information and all the other causes which so many of its original supporters espoused. On the contrary, it has led to a formidable concentration of power in the private media sector and, far from improving the public service model of television, has actually weakened and subverted it.

As Giuseppe Richeri states in *Television from Service to Business*, the Italian model "is certainly not one to be followed by anyone who is studying the possibility of developing a system of private networks alongside the public system".

7.2. France

By Bill Grantham

Bill Grantham is now based in Paris. He was founder-editor of Television Business International magazine and Paris bureau chief of Variety. He has written on media affairs for many publications including The Times, The Sunday Times, The Listener, Broadcast, the New Statesman and Cable and Satellite Europe.

The roots of the French approach to broadcast regulation lie in the relationship of the media to the state. The autocratic, centralised Fifth Republic forged by General Charles de Gaulle after 1958 insisted on, and received, a subservient, passive broadcasting system, subordinated to the policy goals of the government of the day.

Thus, as administrations changed, particularly with the arrival in 1981 of the Fifth Republic's first socialist government, heads rolled in public broadcasting, from the offices of the channel presidents to the level of channel controllers and, inevitably, the heads of news departments.

But the result of this approach to policy was not a television system run by unimaginative bureaucrats. One advantage of the French administrative talent-producing machine is that the elite schools such as the Ecole Normale d'Administration produce a flexible, adaptable caste capable of turning their hands to many things, including the running of a public broadcasting system. On a managerial level, changes in government policy caused disruption and a certain degree of paralysis in decision-making, but were not in themselves catastrophic.

The major distortions in policy came at the structural level, where vacillation and change, particularly from 1984 onwards, produced a progressive deterioration in the coherence and quality of French television. In November 1984, a subscription television channel, Canal Plus, began broadcasting. Five years later, Canal Plus has become one of the most successful and profitable television services in the world. But Canal Plus is not what was originally intended.

The first model for Canal Plus was Britain's Channel Four which, since its 1982 debut, has been widely admired in Europe. The then socialist French government wished neither to increase public funding of broadcasting, nor to eat into the advertising revenues already important to the financing of the three existing public channels. It was determined that Canal Plus should be paid for by subscription. This meant that the success of the service would depend on the exercise of consumer choice, which would not favour a Channel Four-style 'minority' channel.

Canal Plus policy quickly changed and the new service was repositioned to

schedule mainly feature films and sport. A policy which at the outset was intended to extend the range of public service broadcasting, was abandoned and replaced with a proposal for an, albeit excellent, commercial channel.

Within a year of the start of Canal Plus at the end of 1985, the government decided to authorise two private enterprise television channels. The socialist government gave two consortium licences which the opposition RPR-UDF centre and right grouping pledged immediately to revoke if it won the spring 1986 National Assembly elections. When this happened, just months after the two new commercial channels, La Cinq and TV6, had taken to the air the new administration decided also to privatize TF1, one of the existing three public service channels, thus creating three private, commercial television services in a six-channel market.

At the same time, the new Chirac government abolished the nine-member broadcasting regulatory body the Haute Autorité (broadly equivalent in function to the IBA and the governors of the BBC) and replaced it with a new organisation, the CNCL (National Commission for Communications and Liberty). Just as the Haute Autorité's composition was widely felt to reflect the political interests of the socialists, the CNCL was seen as being more attuned to the outlook of the Chirac government.

The proposal to privatise a public television channel was both controversial and problematic. It was controversial because the decision appeared to call into question the role of public broadcasting in the French system. It was problematic because it was the most successful service that needed to be privatised if it was to stand a commercial chance under new ownership. During the run-up to the government's decision, the TF1 channel began to outperform the original privatization candidate, Antenne 2 and late in the day it was decided to hive off TF1 instead.

At the same time, the two existing commercial channel licences were reattributed. La Cinq was recognised, with its existing shareholders augmented by, among others, the French press baron Robert Hersant. TV6 lost its licence and was replaced by a new channel, M6.

The privatization of TF1 created a severe distortion in the marketplace. La Cinq and M6 were new services which did not even have sufficient transmitters to cover the entire country, nor funds for substantial amounts of original programme production. TF1, before privatization, led the television audience ratings. After privatization, freed from its previous public service obligations, it pulled even further ahead of the other five channels. Now, TF1 regularly commands more than 40 percent of the weekly audience.

At the same time, the remaining public television channels, Antenne 2 and FR3, were required to compete with the commercial channels for advertising revenues. In the case of Antenne 2, advertising is meant to contribute more than 70 percent of the annual budget. The French equivalent of the licence fee has actually been cut in recent years, reducing the pool of state money available for public broadcasting.

The effect of the requirement to compete on under-resourced channels with public service responsibilities has been catastrophic. Both Antenne 2 and FR3 have lost over half of their audience, thereby losing advertising revenue. The response of the government has been to abolish the CNCL and to create yet another regulatory body, the CSA. The post of President of Antenne 2 and FR3 has been merged, and efforts made to make the two public channels more complementary on the model of BBC1 and BBC2. But the principal financial and competitive obstacles to the health of public television remain unchanged.

The balance sheet of the past five years in French television is therefore as follows: privatized TF1 and the subscription channel Canal Plus are both profitable, Canal Plus highly so; the two new commercial channels La Cinq and M6 are losing money heavily, and look set to continue to do so for the foreseeable future; the remaining public channels Antenne 2 and FR3 are declining, demoralized and lost.

What policy conclusions can be drawn from the French experience? First, if more commercial television is the objective, there must be a level playing field, otherwise an established service like TF1 can effectively crush newcomers. Second, a public television system with a non-commercial mandate must be supported by a funding structure which gives it some real independence from commercial pressures with which it is ill-adapted to contend.

7.3. Television in the USA, A Personal View

By Dr Michael Tracey

Dr Tracey is Director of the Centre for Mass Media Research at the University of Colorado in the USA. From 1981 to 1988, he was Director of the Broadcasting Research Unit in London. He gained his PhD from the University of Leicester.

Stephen King should write a novel about American television. It's a horror story. Do I exaggerate? To an extent maybe, since there is the irreplaceable Cable Network News (CNN), the odd good movie, McNeil Lehrer on PBS, the Sunday morning political talk shows like *Meet the Press* and David Brinkley, the odd drama production such as *St Elsewhere* and *Hill St.*, and technically brilliant sports coverage. But put Diego Maradona onto the football team of the Dog and Gun in Balham and you do not transform the quality of the other 10 players. The problem with American television is not that everything is extraordinarily bad, like watching TV Tirana, simply that there is an awful lot which is just not very good, born of a marked absence of any real commitment to excellence. This is not because there aren't some very clever people in American television, nor that there are not some very well meaning people.

Certainly the figures for the amount of television available are formidable, particularly in the wake of the growth of cable services. This fact, more

*What it
excellence.*

than anything, continues to dominate discussions about the future of television in this country as much as it does elsewhere. Almost 74 million homes are now passed by cable and there are 50,897,000 cable subscribers, a household penetration rate of 56.4 percent - compared to 44.6 percent in 1985, and only 13 percent in 1975. 29.4 percent of homes subscribe to the premium pay services such as Home Box Office. The average cable home will have available to it 35-40 channels, including such services as Arts & Entertainment and Discovery, which draw extensively on the products of organizations such as the BBC.

It is the number of channels which is much touted abroad by the advocates of multi-channel television. Such claims need to be accompanied by a substantial salt cellar. Arts and Entertainment, for example, in the fourth quarter of 1988 had a total rating share of 0.3 percent. In the third quarter of 1988, the top 10 programmes on basic cable were:

1. NFL Pre-season: Indianapolis vs Denver
2. NFL Pre-season: New Orleans vs Minneapolis
3. NFL Pre-season: Minnesota vs Phoenix
4. Clash of the Champions III: The Fall Brawl (wrestling)
5. Movie: Death of a Centerfold
6. Movie: Good Guys Wear Black
7. NFL Pre-season: Philadelphia vs Pittsburgh
8. CFA Football: Tennessee vs Georgia
9. Movie: Porky's
10. Movie: Porky's II

The rest of the top 50 were of similar ilk, from the *Beverly Hillbillies* to the *Brady Bunch* to that joy of one's childhood, *Bonanza*. The more astute observer will note then that in the new multi-channel, deregulated world of TV we are not talking of the recreation of the Alexandrian Library. And there is definitely not a lot of Puccini in there.

The problem, and this has been said so many times that it borders on the clichéd, is that the economic and intellectual structures within which the system rests, and which are now being adopted around the globe, nurture a blandness, an absence of the excellent on anything other than a spasmodic basis. The packaging and promotion are something to behold, but the actual experience is a bit like being invited to the Ritz for a meal and then being offered a Big Mac.

I suspect that at the heart of those kinds of programmes which usually provide the mark of distinction to a television service, there is an absence of creative vision. I am thinking here of such things as drama and children's programming, arts programming and documentary, news and public affairs. Such vision usually implies a taking of risks, an offering of the different, the occasionally difficult, even unpopular, the ability, courage even, to recognise when the excellence has drained from a series, to have only six or even 13 episodes and then to stop production because the quality cannot be sustained.

Such notions are anathema in the US, and have to be so. The real creativity

What is
excellent?

is represented in the figures who control the overall schedules for the networks, such as Brandon Tartikoff of NBC whose genius is in the generation of polished blandness which keeps the audience share and therefore the profits rolling in.

Where there are some examples of good programming, they remain marginal to the central character of American television. For example, the much applauded CNN gets a tiny share of the total amount of viewing, at the time of writing one percent. In fact, the impact of cable has been less than that of the cumulative impact of small independent terrestrial stations. In November 1988, for example, basic cable and pay cable had a 20 percent share, and the independents 23 percent. And most cable and all the independents offer a diet of down-market re-runs, old movies and the occasional import, usually a documentary about the great white shark or the mating rituals of the Madagascan lemur made 20 years ago by a youthful-looking David Attenborough.

It is in fact a second-hand bookshop stocking mainly pulp fiction. Occasionally one will come across something special, but not as much as there should be given that we are speaking here of an industry whose total revenues are in the region of \$30 billion, more than six times the combined revenues of the BBC and ITV (about \$4.8 billion). But this is not a situation fashioned by the forces of nature. It is a human creation. Evidence, if ever there was, of the imperfectability of Man.

1982
Eight years ago the Reagan-appointed chairman of the Federal Communications Commission (FCC), Mark Fowler, uttered an awful and, as it turned out, awesome phrase. He was speaking to the International Radio and Television Society and argued, "From here onward, the public's interest must determine the public interest". Thus were spoken the words which have since been reshaping global broadcasting, the core theses of the new religion of the market. 'New' is the wrong word here, writing from within the confines of the US which has known nothing other than the market. But before Fowler there had been a certain nodding in the direction of the 'public interest' something other than the simplistic market definition of programme content. After Fowler such sentiments became viewed as largely nostalgic nonsense.

The US became the primary laboratory for an enormous global experiment in the place of television within modern culture. After almost a decade in which the Fowler model has drifted across the surface of the globe like that life-carrying, interstellar dust so beloved of the mind of Fred Hoyle, the need is to ask - what is the evidence that the experiment has worked? This question is now beginning to be asked even here in the US. In October 1989, I happened to be standing in the office of a senior figure in the FCC. On the wall was a handwritten note which simply said that the Joint Economic Committee (of House and Senate) will be discussing the question 'Has deregulation worked?' Well, has it? The answer depends on where you stand.

In the US there is a massive, self-congratulatory attitude within the

industry. Certain words like 'choice', 'diversity', 'free market' are here not concepts to be explored, but received truths to be chanted. It is simply taken as given that the United States is well served by its television services. At a recent meeting of the Cable TV Administration and Marketing Society, Brian Roberts, Executive Vice President of Comcast Corporation, said that compared to Europe and Japan, "we have the best TV in the world. We have more choice, more quality and quantity". The famous broadcaster Walter Cronkite, once the most trusted man in the United States, is currently heading a television campaign plugging the virtues of "free television", pointing out the wonders of the network and affiliate system.

In their book, *Managing Media Organisations* published in 1988, John Lavine and Daniel Wackman talk of the four main trends shaping the future of American television: the move toward bigness, advances in technology, increased emphasis on marketing and a heightened profit consciousness. They comment, "when profit consciousness dominates or combines with the other three trends it causes many media managers to concentrate on making their products respond to the market in the narrowest, most pandering sense of the term. That is, they inform but only in surface ways, not in depth. If they 'interpret' it is from a shallow, narrow point of view. Even when they transmit culture or entertain, too often it is for the lowest common denominator of the audience."

But why?
Because entertainment
is inherently larger
audience size.

In November 1988, even Newsweek expressed its concern with this situation when its cover story for November 14 was "Trash TV: From the Lurid to the Loud, Anything Goes". The piece quoted Roger Salant, former CBS News President, saying that network television is "being dominated by a new breed of manager to whom ratings are the bottom line. It's to hell with any standard of decency". And the producer of the network programme *60 Minutes*, commenting on what had happened to local stations under ever greater market pressure, observed that "it's one big porno shop".

Even the business community has become worried. In 1987 David Schutz, a New York investment banker with 20 years experience financing the broadcast industry, wrote, "In the broadcasting industry speculative ownership of stations frequently results in significant reductions in the quality of programming and community service offered to the audience." And in similar vein the commentator Roger Mudd has argued that the rise of television news as a business has "meant a whole new mentality in network newsrooms, pressured by a new breed of corporate owners who had entered broadcasting under deregulation. It meant merchandisable anchors, on-the-road newscasts, self-promotions, the slow erosion of the wall between show business and news business, and the growing tendency toward trivia, in which no story lasted more than 90 seconds, and no one was heard to speak for more than 12".

The conclusion is obvious. If the United States is the model for deregulated television, the balance of evidence is that, as a system, it tends toward the superficial and the trivial, the glitzy stuff of appearance rather than substance. Such a system inevitably finds it difficult to encompass with any depth and feeling the major issues of our time. In a nutshell, the capacity of

So if popular celebrity on decade of Novels
to do command, review / public service they will buy the networks - TV coverage with them.

is reminiscent of
celebrity!

a deregulated television system, particularly in its information services, to deal with such complex and intractable problems as the environment and the Third World is severely limited; to wit, what on earth can one begin to say when the average length of a network news story is just 30 seconds.

7.4. The Australian Experience

By Will Davies

After graduating from the Australian National University, Will Davies began his film career at Film Australia in 1972. After working in the USA and at the Natural History Unit of the BBC in Bristol he returned to Australia and formed Look Films. Since 1982, he has produced a number of documentaries on international issues. For the last five years, he has represented documentaries on the Australian Producers Association.

Australian commercial television has recently gone through a period of dramatic de-valuation and ownership changes. Not so long ago Australian television was a 'family business', run by the media baron families like Fairfax, Packer and Murdoch. Today, entrepreneurs backed by accountants and lawyers have taken control.

Television came to Australia in 1956 with the introduction of three networks: the Government controlled Australian Broadcasting Commission, (ABC) now a Corporation similar to the BBC, and two commercial networks, Seven and Nine. Channel Nine first went on air on the 16th September 1956 with an introduction by Bruce Gyngell, who now runs TV-am. Then followed the ABC in November and Channel Seven Sydney in December 1956. It was not until April 1965 that Channel 10, the third commercial network, went on air, followed by the Government ethnic station, the Special Broadcasting Service (SBS) in 1978.

The recent changes in ownership, however, have proved to be far more destabilising than anything that has happened in the previous thirty odd years. For a major part of this period, the three commercial networks were controlled by a series of newspaper barons: Channel Seven by the Syme (Melbourne Age) and Fairfax (Sydney Morning Herald) families, Channel Nine by Kerry Packer (Australian Consolidated Press), and Channel Ten by Rupert Murdoch. As expectations increased about the profitability of both television and radio licences, particularly with the introduction of FM, ownership passed to a different type of entrepreneur with a different perspective.

The new owners of the networks came from totally unrelated business sectors. Christopher Skase took control of the Seven Network from a career beginning in stockbroking, and expanding under the Quintex umbrella, into property, hotels and a network of business propositions. Alan Bond began his career as a signwriter, but moved quickly into a broad range of business

interests, including Bond Media, the licence holder for the Nine Network. The Ten network was controlled by Northern Star Holdings, a company chiefly concerned with supermarket development.

These changes in ownership have generally been costly. Alan Bond reportedly paid over one billion Australian dollars (about UK £500 million) for the Nine network, a total of five capital city member stations. Although the real balance sheets and figures are near-impossible to obtain, it is generally considered that these are highly profitable operations. The high interest payments needed to service the loan have meant that little money remains to buy programmes, especially locally produced ones. To compound this further, the competitive nature of Australian television has meant that the three commercial channels have entered into long term arrangements with the major American companies, paying highly inflated prices to secure what they think are the highest rating US programmes. In reality, Australian audiences prefer both Australian drama and Australian documentaries. But the channels still buy on a lowest common denominator basis.

For the Australian independent producer, instability through ownership changes are just one of the current difficulties. The commercial television regulatory body, the Australian Broadcasting Tribunal (ABT) has failed to force the three commercial networks to fulfil current quota requirements with respect to Australian content. Only two quotas effectively exist to aid the local production industry. The first is that each of the three commercial networks, ie. not including ABC or the SBS, has to screen two hours per week of first run Australian drama, a total of 104 hours per year. Second, television commercials have strict guidelines with respect to production elements and this sector of the industry has in fact underpinned the remainder for many years.

On the other hand, Australian producers run up against strict national quotas in most markets of the world. The UK quota of 84 percent nationally produced programming for domestic broadcast leaves little room for foreign independents, particularly after the purchase of US 'blockbusters' has eaten up much of this small share. In the USA, 99.9 percent of major network television is taken up by American-made products. There is a real difficulty in selling into the major English speaking markets while, at the same time, American and British programmes fill Australian screens.

Apart from the tilt in the playing field after the ownership changes, there is political manipulation of the shape, size and funding of the local industry. In the early 1980s, the Government introduced legislation to allow investment in Australian film and television production through highly attractive tax deferrals. Investment in approved films attracted a tax deduction of 150 percent on monies invested, coupled with a tax-free threshold of 50 percent. This naturally generated much investment for film, resulting in a boom in production and the appearance of Australian films around the world. But with such attractive investment came the abuses and it was not long before the tax incentives were reduced with a subsequent down-turn in production.

Naturally, the industry complained. The Government, keen to contain the amount of money available to production, but also to have a domestic film industry, established the Australian Film Finance Corporation. This statutory body now operates as a soft loan bank for domestic producers to make 'Australian' productions, and thus to keep Australian dollars in the hands of the Australian television industry.

Australian television does schedule some Third World and Environment programmes. Commercial television, forever on the look out for absorbing 'fillers' between commercial breaks, has recently picked up on the environment in particular. Politics generates news and news generates support programming, Environmental issues have recently lead the field. In an amazingly short time, the country has switched onto re-cycling, power conservation and a broad range of environmentally-sound practises from land re-generation to the solar degradable plastic bag. A demand for suitable programmes has been generated as schedulers and station managers feel the need to support and be associated with such issues.

Foreign imported material is attractive to terrestrial television as it is not hampered by quotas (especially for documentaries) and is always cheaper to buy. Locally produced material would cost A\$20-50,000 per hour while bought-in material A\$10-20,000 per hour. As long as a programme is likely to score well in audience percentage terms, is dramatic and is of a sufficient technical standard, commercial stations are likely to buy it.

Local television is now establishing in-house production units to keep down the costs for this type of non-fiction programming. It benefits them in a number of ways. They get the programme they want with the editorial slant they think appropriate. They make these programmes at low cost, using staff (often recently made redundant from other areas) and in-house facilities in downtime. And they can claim to both the ABT and their audiences that they are presenting 'Australian' programmes with an Australian point of view.

The programmes have proved to be heavily journalistic, shallow, overdramatised and simplistic. Apart from the ABC and SBS, no serious in-depth coverage of international issues can be expected from news, documentaries or extended current affairs coverage on Australian commercial television.

This is not good news for the Australian production sector, but given the problems of finance, changes in the legislation affecting the film industry, the total lack of quotas for documentaries, the present weakness of the ABT, the disarray of the networks and the difficulties selling into foreign, high quota markets, the Australian documentary industry has a long and difficult road ahead.

CHAPTER 8. RADIO AND THE BROADCASTING BILL

By Steven Barnett

Steven Barnett is Assistant Director of the Broadcasting Research Unit where, for the last four years, he has undertaken wide-ranging research on issues of broadcasting policy, funding, regulation and structure. Previously, he was with the Consumers Association, where he was responsible for a range of studies on consumer campaigning issues. He has social science degrees from Cambridge and the London School of Economics.

In the UK, we spend about two hours a day listening to radio. While this is low relative to the volume of television viewing, and low compared to radio listening in other countries, research among listeners has demonstrated unequivocally the contribution which radio makes to people's everyday lives. Whether as background entertainment to accompany other activities, or as a means of keeping in touch with the local community, or providing access to traffic, transport and weather information, or as a vital source of news and information about national and international affairs, radio provides an indispensable service. Home Office-sponsored research undertaken by the Broadcasting Research Unit found only four percent of British listeners dissatisfied with their radio service - an extraordinary vote of consumer confidence unmatched by almost any other public service.

Forming the backbone of this service is the BBC, whose four national stations and network of local stations constitute around 75 percent of all radio listening. While the BBC's dominance is, to a large degree, attributable to its 50-year start over commercial radio and to a listening public not yet totally comfortable with radio commercials, it is also a tribute to the high levels of loyalty and satisfaction which each of the national networks command.

Over the next few years, commercial radio in the UK is to receive a significant boost. Additional spectrum availability, together with rationalisation of current BBC frequencies, means that three new national stations will be initiated. The Government has decreed that each of these will be funded from the private sector. In addition, frequencies are available for more local stations, also funded from the commercial sector, which will add a further dimension to listening opportunities. As part of this re-organisation the BBC is to add a fifth national station catering specifically for education and sport.

It sounds like a cornucopia of choice and variety about which only the most hardened cynic would find cause for apprehension. There have, however, been severe reservations expressed from a number of independent sources. There are two major areas of concern, both directly related to Government proposals on the future of radio.

First is the intention to liberalise the current regulatory regime on commercial radio. It is feared that the deregulatory impetus predicated on a free market philosophy will put profits and commercial viability before listeners; that small commercial local stations, currently cross-subsidised through rentals paid by larger stations, would cease to exist; that the journalistic input, which is a vital element of many local stations' programming policy, will become an expensive luxury which must be axed; and that in the headlong dash for viability, fragmenting audiences will mean the survival of only the cheapest format music stations. Both common sense and research among listeners suggest that such an outcome would be contrary to the public interest.

Commercial radio's future will therefore depend heavily on the new Radio Authority, the criteria it lays down for successful franchise applicants, and the means by which it implements and reinforces its judgements. Legislation which produces a toothless body with a clear mandate to ensure that the most profitable enterprises have the greatest right to broadcast, will wreck British radio. Legislation which insists that franchises be offered across a wide range of potential programming, and that persistent breaches of contractual promises must be punished by withdrawal of the franchise, could provide exactly the sort of diversity which listeners want. Not even the most ardent free marketer could wish to see the ravages of the French free market imposed on the UK.

The second cause for concern is the future of the BBC. In its contribution, in particular, to speech radio, BBC's Radio 4 has few rivals throughout the world and commands about 12 percent of listening in the UK. Radio 3 is the only continuous source of classical music available. And Radios 1 and 2 provide the only opportunity for listening to popular music for those who prefer their radio uninterrupted by advertisements. These stations are funded through the television licence fee.

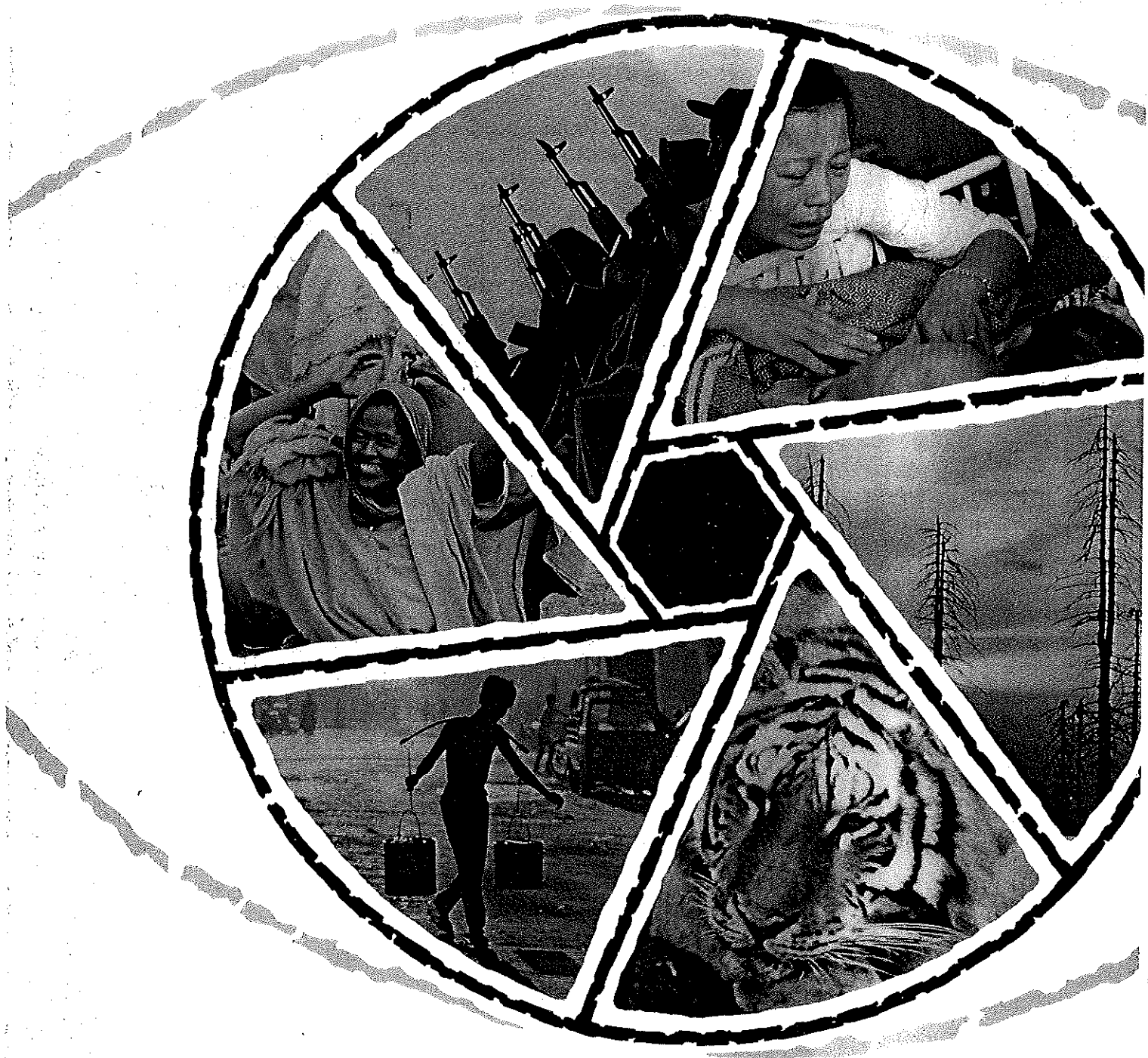
BBC radio is unquestionably threatened by the Government's ambivalent attitude towards the licence fee. It remains to be seen what the new Home Secretary has to say about its future, but both Douglas Hurd and Tim Renton were agreed on the phrase which eventually found its way into the White paper: "the licence fee is not immortal". While for the moment it remains intact, and will probably remain so until the next election, subscription television is being canvassed as a very real possibility for the future of the BBC. Whatever the consequences might be for quality, it is certainly technically feasible to turn BBC television into a subscription service.

This is categorically not an option for radio. The single most important question about the future of radio, consistently asked of the Home Secretary and consistently evaded, was how BBC services were to be funded if the licence fee was to be phased out in favour of subscription.

Increasingly loud voices - mostly from the advertising industry and larger commercial stations with an eye on national franchises - are calling for the withdrawal of the BBC from popular music on the grounds that it squanders

licence payers' money. Yet Radio 1 costs approximately 3 pence per household per week. Meanwhile Radio 4 provides the outlet for plays, documentaries, news and current affairs through a network of correspondents around the world. Radio 4 costs approximately 10p per household per week. It makes a major contribution to listeners' overall satisfaction with the performance of BBC radio. No alternative to the licence fee has been suggested.

Quality and diversity, choices and opportunity: these are the common currency of listeners and Ministers, where the means are disputed only by those irrevocably wedded to the free market as a universal panacea. Speech radio, in particular, is expensive and will not emerge unprompted out of a free market; and yet, on their own evidence, it constitutes an invaluable informational lifeline for the vast majority of the population. The means for encouraging quality and diversity in radio are not difficult to define: a strong and effective Radio Authority providing a positive regulatory structure for the commercial sector; and a renewed and unambiguous commitment to BBC radio through an adequate, continuing licence fee. Anything less would be a grave disservice to an industry which has earned an astonishingly high degree of popular support.



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