Article

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Content in context: The impact of mobile media on the British TV industry

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Abstract

This article explores the ways in which smartphones, mobile technology and media and, with this, the growing practice of viewing and interacting with content on multiple screens and devices, are informing changes to the TV industry and the content it produces in the United Kingdom. The article reflects on how British TV companies, producers and executives understand their role and the types of content that is currently being commissioned and funded within this changing mediascape. Based on industry data from Ofcom and PACT, interviews with producers, commissioning editors and executives as well as participant observation at industry events, the article argues that mobile media is having a profound impact on the British production sector and ecology. In order to understand and describe the players and practices that make up the 'TV industry' today, it is now necessary to rethink how content is defined and where it appears. There is also a need to reconsider who the content producers, broadcasters and distributors are within this industry, and include a wider spectrum of producers as well as the telecoms, aggregators and social media networks as funders and distributors of audiovisual content within this ecology. These reconfigurations impact not only on constitution of the TV industry itself, its modus operandi and the content it produces but also on how arts bodies, policymakers and academics need to approach this ecology.

Keywords

British television industry, long-form and short-form, mobile content, mobile media, mobile video, multiplatform, production studies, second screen, smartphone, two screen

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Introduction – multiple screens and mobile media

4G and the massive uptake of smartphones and tablets are having a profound impact on the form, genre and quality of the content produced as well as the financing, production and distribution of all audiovisual content today, and so too on 'television' as content and as an industry. Today, there are 23.6 million 4G subscriptions in the United Kingdom[1] and 70% of all Brits have a smartphone rising to 93% of 16- to 34-year-olds. There is at least one tablet in over half of British households (Ofcom, 2016a: 19; 2015b: 3–7). Seventy-two percent of all Brits watch video on mobile devices at least every week (Ofcom, 2015a: 6) and 98% of 16- to 34-year-olds do this every day (Brittin, 2015). Forty percent of all, 78% of 16–24 and 61% of 25- to 34-year-olds watch on a smartphone (Ofcom, 2016b: 43; 2016a: 21). Over half – and 25% of all viewers and 60% of 16- to 34-year-olds – habitually watch and interact with content on two or more screens simultaneously (Brittin, 2015; Ofcom, 2013a, 2013b: 14; 2015b). In the United States, 60% have done so since 2010 (Amar Toor as quoted in Lee and Andrejevic, 2014: 41; Chmielewski, 2013).

The viewing affordances that Internet-enabled portable screens and devices offer are reshaping viewer behaviour, and driving changes to the form, platforms and notions of quality of content (Lee and Andrejevic, 2014; Marshall, 2009; Van Dijck and Poell, 2014). This in turn affects TV content as well as impacts on the industry that produces this, in terms of the producers, production companies and players possible within the production ecology. It also reduces the differences between the services provided by the telecoms, aggregators and broadcasters, as it will be argued here. This complicates the mesh of existing and emergent business models in the screen industries, and, in turn, the British TV industry.

Methods and focus

This article explores the impact of mobile media on the TV industry and the content it produces from a cultural economic, creative industries and production studies perspective. It takes as its starting point participant observation of the panels, sessions and keynotes at the Edinburgh International Television Festival in August 2015, a key annual event for the British TV industry. It also draws on literature from TV, telecommunications and mobile media scholarship; on contemporaneous interviews with industry professionals, producers and executives; commissioning priorities and briefs listed on broadcasters websites; industry statistics from the British telecoms regulator, Office of Communications (Ofcom) and Producers Alliance for Cinema and Television (PACT); and publicly available data of budget flows, company turnovers and acquisitions. On this basis, the article reflects on how the executives in the British TV industry see their current roles and priorities within the multi-platform, 'second screen' and multiple device environment and the reasons why they are directing their attention to specific content, platforms, broadcasting and distribution forms.

Turner and Tay have succinctly observed that TV is understood, used and interacted with in a variety of ways across the world (2009: 3–5). This article's primary focus is on the British TV industry. However, it will also be relevant for national mediascapes and industries that are modelled on or akin to the UK industry. That is, media ecologies are made up of commercially owned broadcasters, public service broadcasters with public service remits and commission structures as well as public screen funding bodies. Examples of such countries are Australia, Canada and many countries in Europe. Extending national boundaries, Marshall notes that different and distinct online video cultures tend to develop around a shared geography and language, rather than

common national identities (2009: 46). From an industry perspetive, Marshall's points echo Hesmondtalgh's notion of 'geocultural markets' (2013: 278), and from a practitioner and consumer standpoint, Straubhaar's exploration of the 'geocultural layers of media use and access' (2008: 27). These layers are experienced by both media professionals and audiences/users as dynamic and shifting interactions between global, local, national and transnational cultures, political economies and technological possibilities. The observations made here will therefore also be pertinent to the markets that the British TV industry sells its products to, is influenced by and influences, especially the European, Northern American and Antipodean TV markets.

Mobile media and the TV industry

The uptake of mobile technology and the increasing practices of watching audiovisual content on a variety of screens and devices, directly or indirectly informed much of this year's International Edinburgh TV Festival Edinburgh International Television Festival (EITF), its events as well as the discussions and debates unfolding there. This festival is always a good place for trendspotting in the TV industry. It gathers TV and content producers, controllers, commissioners and communication executives from the United Kingdom and around the world for 3 days of deliberations on the state and future of TV. There are various keynotes; themed panel discussions; sessions outlining commissioning priorities; promotion of programmes, products and brands; and networking. Starting as an informal gathering of industry professionals who met to discuss TV and the TV industry 40 years ago, this year the festival hosted around 1400 delegates from 17 countries and 4 continents (EITF, 2015a). As one might expect from a congregation of industry professionals whose livelihood is dependent on storifying, promoting and broadcasting events, the humble beginnings of the festival are now part of its mythology, and the festival's self-proclaimed (and probably true) status as an agenda setting and essential international industry event are part of its fabric.

However, behind the 'self-promotion', 'spin' and 'scripted flak', as Caldwell has characterized what goes on at industry events (2008, 2009: 214, 215), the festival is a reflection of how the British TV and content industry thinks about itself right now. It offers a snapshot of the products, programmes and players that the industry deems important. As an industry gathering, the emphasis is on business, and collectively the festival's panels, sessions and events indicate which types of programmes and content are considered prime and command the highest budgets. This has consequences for the production industry because it helps determine where broadcasters will invest and production companies and producers direct their efforts in the near future. This, in turn, is of interest to scholars researching contemporary production culture in the United Kingdom, Europe and the English-speaking world. Analysing the explicit and implicit messages emerging from this industry event is therefore a worthwhile academic venture.

Short- and long-form as prime content

From the discussions at the sessions at the Edinburgh International Television Festival as well as among delegates, invited speakers and panellists, it is apparent that budgets are flowing toward both short-form and long-form content (EITF, 2015b). That is, there is a polarization of the length and type of content that is considered prime. This was also observed at the 2014 Flow Conference by the Executive Vice-President of Microsoft Xbox Entertainment Studios, Jordan Levin who expressed concern that 'the middle' has fallen out of TV production and production budgets are

gravitating toward either massively high value and production or YouTube do it yourself (DIY) (as quoted in Lotz, 2014). The sessions 'Should My Show Have an App' and 'The Ultimate YouTube Talent Masterclass' and invited speakers like the YouTubers VSauce (Michael Stevens) and TomSka (Tom Ridgewell) as well as Dan'l Hewitt, managing director UK at the short-form production house Maker Studios, centred on the aesthetics as well as businesses models of short-form content. This interest in short-form was countered and complemented by the stand 'The US Gamechangers' which featured interviews with commissioning editors and executives from market-leading and acclaimed long-form drama and documentary series production and distribution companies, for example, Home Box Office (HBO), the producers of *The Wire* (2001–2008) and *True Detective* (2014–); Amazon Prime who made *Hand of God* (2015–), *Transparent* (2014–) and *Outlander* (2014–); FX, the makers of *The Shield* (2002–2008) and *Sons of Anarchy* (2008–2014); and Showtime, the producers of *Dexter* (2006–2013) and *Homeland* (2011–).

Historically, there has been, and still is, a continuum from short- to long-form formats, content and associated budgets in TV. In addition to fixed duration commission for TV schedules, slot fillers have always been necessary to fill out broadcasters schedules. These range from self-promotional channel idents of various lengths, or trailers promoting programmes and advertising upcoming series and seasons, to more substantial short-form commissions, for example, to develop and showcase new production talent. Examples are the British Public Service Broadcasters Channel 4's post-news *The Slot* (1994–2005) and *Three Minute Wonder* (2005–) or video diaries like BBC's *Video Nation* (BBC, 1993–2011) that showcased a diversity of voices on TV by allowing viewers to feature in their own short documentaries (Broadcast, 2004; Cousins and Macdonald, 2006: 373; Hight, 2008: 5–6).

Today, short-form is gaining momentum, new meanings and uses through social network services (SNSs) like YouTube, Facebook, and Twitter for individual users, 'prosumers' as well as for multinational media corporations alike (as also explored by Andrejevic, 2009; Lee and Andrejevic, 2014). With the ability to embed and share video on social networks and platforms, most content providers – be they SNS, international studios, broadcasters, or Video on Demand (VOD) providers – are now looking to short-form as content for consumption in its own right as well as a vehicle to drive advertising revenue (Andrejevic, 2009; Brittin, 2015). The Facebook-owned Instagram introduced video on its photo sharing platform in June 2013 and now has over 400 million active monthly users (Instagram, 2015). Vine, which was bought by Twitter before its launch that same year, had 200 million Vine watchers, up from 100 million in August 2014 (Dredge, 2015) and is now integrated into Twitters video functionality. Disney bought up the short-form production house Maker Studios in 2014 (Spangler, 2014). Short-form comprises the majority of the staggering 400 h of content that is uploaded to YouTube ever minute (Brittin, 2015), and around half of the British population (47% of all age groups and 57% of 16- to 24-year-olds) say they use YouTube as a source of information (Ofcom, 2015b: 6). Legacy broadcasters, too, are moving into short-form. Jon Stuart, a broadcaster and brand in his own right born out of *The Daily Show* on the US cable channel, Comedy Network, announced in November 2015 that he had signed a deal with HBO to deliver and 'create short-form digital content' (Glenza, 2015). Channel 4 is currently commissioning short-form series of six 3- to 7-min episodes for All 4, Channel 4's multiplatform presence across devices (Channel 4, 2015). BBC is seeking to engage with diverse groups and local communities by recruiting local vloggers to produce short-form video for all its channels (BBC, 2015), echoing the outreach, diversity and representation remit of *Video Nation*.

At the other end of the spectrum, high-end drama and documentary series and serials were the precursor to today's boxset-shaped, long-form TV drama (Brundson, 2010; Caughie, 2000). With

the current critical and commercial success of drama series from American cable channels like HBO, FX and Showtime and of documentary and factual series on for example BBC, National Geographic and Discovery, drama and documentary series now command larger budgets than ever before. Moreover, the status and cultural clout of TV drama series have been elevated to that of films. Film festivals like Cannes, Berlin and Toronto are premiering the first episodes of new drama series alongside their feature film programme. The importance of long-form drama was also evident at the Edinburgh International Television Festival. The first episode of Amazon Studio's series *Hand of God* was screened at the festival followed by a Q&A with the four leading actors Ron Pearlman, Dana Delany, Alona Tal and Julian Morris; the writer Ben Watkins; and the director Marc Forster. Channel 4's drama series *This is England '90* premiered the following day with an introduction by Director Shane Meadows. Similarly, the prominence of long-form drama was evident in the festival's stand 'US Game Changers' which featured a series of interviews with US drama and documentary commissioners and gave Michael Ellenberg, HBO; John Landgraf, FX; David Nevins, Showtime; Roy Price, Amazon Studios; and Richard Ross, Discovery US their own speaking platforms to address the British TV industry.

This polarization of what constitutes prime content and what commands the highest budgets has several implications for the industry that produces it.

The producers – between self-casters and superindies

The spectrum from short- to long-form is increasingly mirrored by the make-up of the production industry in the United Kingdom. Today, the industry consists of companies on a scale from, at one end of the spectrum, self-casting vloggers with low overheads who make a profit through building their fan base, to, at the other, horizontally and vertically integrated international studios and production houses that can aggregate, curate and commercialize this content.

This restructuring of the industry was pre-empted by, at least, polarizing developments to the British TV industry precipitated by structural, regulatory, technological and cultural changes to the sector. These developments are currently being accentuated by mobile media, viewing on multiple screens and mobile technology, allowing them to synthesize and mature. In the 2000s, international media conglomerates bought up British production companies on a large-scale. This was part of a global wave of media concentration, convergence and internationalization in the 1990s and 2000s as well as a general trend to consolidate media companies and brands (Doyle and Paterson, 2008; Hesmondtalgh, 2013: 151–156 and 186–203). It was also a way to acquire the rights to IP and the back catalogues owned by production companies following changes to the terms of trade between British broadcasters and independent production companies in 2004. These new terms of trade were negotiated by the British production industry's interest and lobby organization PACT and allowed producers to retain rights to their production after initial TV transmissions. In effect, this made British TV production companies attractive targets for takeover from multinational media corporations with distribution arms, precipitated the consolidation of media companies and so the so-called multinational 'superindies' emerged (Chalaby, 2010; Doyle and Paterson, 2008). Echoing this wave of acquisitions, and proceeding in much the same way, multinational studios are now taking over YouTube channels to access content, stars and their followers, and with that, acquire and drive up advertising revenue (Andrejevic, 2009). For example, Dreamworks acquired the YouTube youth channel Awesomeness TV in 2013, and Disney bought Maker Studios in 2014, as already mentioned. Maker Studios has subsequently teamed up with Endemol Shine in October 2015 to target and expand to markets in France, United Kingdom, Brazil, Spain and Germany (Spangler, 2015).

Conversely, in recent years, there has been an influx of micro-producers in the British TV industry. Figures from the UK TV industry's weekly magazine broadcast show in addition to the production companies that are members of PACT, the UK's independent production sector's lobby group, there is an additional 500 producers with a turnover of under £1 million (PACT, 2015: 14). It is unclear from the broadcast survey which types of content and on which platforms these producers produce content for, but in line with Broadcast's and PACT's interpretation of the composition of the industry, these should be seen as part of the TV industry.

Technological and cultural and changes to work practices have also informed the changes to the production sector. These can be seen in the industry reconfigurations and modus operandi that are made possible by digitization, Web 2.0 and increases bandwidth as explored by among others, Bennett and Strange (2011), Jenkins (2006), Holt and Sanson (2014), Curtin et al. (2014a), Marshall (2009), Caldwell (2003, 2011), Turner and Tay (2009), and Doyle (2013a, 2013b, 2015). The proliferation of User-Generated Content and DIY broadcasting on YouTube and various other online platforms over the last 15 years have prepared the ground for today's YouTube stars (Burgess and Green, 2009; Marshall, 2009), but also the TV sector is also increasingly influenced by the digital business, production and distribution models that are emerging on platforms like YouTube, Vimeo and Vine (Burgess and Green, 2009; Snickars and Vonderau, 2009), and traditional broadcasters now have TV stations on YouTube and seek to enhance viewing experiences, promote and generate traffic for their content on social networks for example through second screen companion apps (for second screen theory, please see Lee and Andrejevic, 2014; for research on apps in live sports broadcasts, please see Boyle, 2014; Sørensen, 2016; and for the limitations of TV apps, see Tussey, 2014).

Exploring the activities and practices of individual content producers on YouTube, Burgess and Green observe that producers across platforms exist on a continuum and that the distinction between 'amateurs' and 'professionals' is growing increasingly unhelpful when seeking to understand the production of audiovisual content across platforms (2009: 57). Many screen workers oscillate between working for themselves and working as a service provider for larger production entities higher up the chain. Elsewhere Burgess importantly notes that whatever their status be, all are engaged in the same cultural practice (2011). Where it is true that the perceived and actual status of individual workers as amateurs and professionals depends on their working conditions at a given point in time, as Burgess and also Caldwell (2008, 2011) note, it is also the case that some YouTubers are now production houses in their own right, broadcasting across platforms and commanding their own audiences. To illustrate, Felix Kjellberg (games vlogger, PewDiePie) currently has close to 40 million followers, and his annual revenue in 2014 was reputed to be £2.5 million (Edwards, 2015; Statsheep, 2015). Another British top-rating YouTube star, make-up vlogger Zoe Sugg (Zoella), reported a 2014 revenue of £400,000 to Companies House (Dunsby, 2015). This illustrates that YouTube's business model of differentiated sharing of advertising revenue between the Google and the individual YouTuber has now matured. Self-casting producers play a serious and significant role in, and must therefore be seen as part of, the British production ecology and sector.

This point is also underlined by the business model of the short-form production house Maker Studios. Their hybrid production model illustrates that, increasingly, there is little point in distinguishing between 'professional' and 'amateur' content providers and companies. Maker was originally conceived as the coming together of individual YouTubers to reap advantages of economies of scope. Today the company has its own production studio with facilities (Cunningham and Silver, 2013: 98) and represents a community of 55,000 individuals who produce 1200 h

of original content every day. Last year, Maker was acquired by Disney for a reputed US$500 million and is now seen simply as a Disney studio, according to Disney's UK Managing Director, Dan'l Hewitt (EITF, 2015c).

Maker Studios is also illustrative of another facet on the industry today. Although anyone with a webcam or smartphone can set up their own channel and broadcast their own content with minimal overheads, the difficulty comes in making your channel heard over the noise of all the other people doing exactly the same. Enter the studios, media corporations and brands that can bring branding, name recognition and PR to the table and promote individual vloggers. In this way, Maker Studios brings the schism between self-casters and superindie full circle. As much as Maker gives clout, power and organization to individual producers, it is also illustrative of the aforementioned concentration of producers and production companies that characterizes the mediascape today.

Production outlets today, then, range from anything from one-man-bands, over Maker's model of curating crowdsourced content from these one-man-bands, to Universal Studios. Producers and production companies are all content makers of differing size and scale with various production overheads making content to distinct audiences on discreet platforms, financed by the same sources of commercial capital or public funding.

Structural challenges to producers and production companies

This wider definition of the TV industry, the polarity between self-caster and multinational studio as well as the budget flows moving toward very-short- and very-long-form content, poses potential structural challenges to the British TV industry in terms of its composition, its funding avenues and ownership.

First, 85% of the UK's established production companies are small businesses with a turnover of between £1 and £25 million with fixed overheads (PACT, 2015: 14). They often lack both the flexibility and low overheads of the self-casters and the vertical integration and the economies of scale of the superindies and the US studios. This challenge was summed up by at the 2015 Edinburgh International Television Festival's Masterclass 'Who Wants to Be a Digital Millionaire' by Dominic Burns, senior vice president at NBC Universal International Studios:

> *I think, the conundrum for most production instances with the YouTube space, from our perspective anyway, is that it seems there are two ways to really make money and be profitable, you can either be an individual YouTuber who fills a decent portfolio of subscribers and views and then it can be quite profitable because your costs are low, or you can be at the Maker end of the business or the Endemol Shine end of the business where you've got a massive, massive scale. The challenge for, I think, a lot of production businesses is you have to invest the sorts of money that those companies have invested to get the real return, so it's that in-between position that I think a lot of production businesses wrestle with: How am I going to make this generate profit, even short- to medium-term, without investing . . . millions of dollars?*

Second, in the United Kingdom, the main funding avenue for the majority of independent TV production companies in the United Kingdom are still fully financed commissions by the main four terrestrial broadcasters, BBC, ITV, Channel 4 and Five. This accounted for 83% of funding of primary commissions to independent production companies in 2014. There are of course still budgets attached to traditional programme genres, forms and formats, but in real terms, the cumulative spend has fallen in recent year (PACT, 2015: 12). Also, advertisers are moving from investing in broadcasters to online.

Sponsorship and product placement by commercial brands also play an increasingly significant role for broadcasters as well as for business models on YouTube. However, where sponsorship and advertising are highly regulated when transmitted by the broadcasters, it is less so online. Here, sponsored, branded and brand produced content is becoming the norm and the prime funding form. Last year, four of the top 10 most watched videos were ads or short films sponsored or produced by brands like Pepsi, and all of the top 100 global brands have run ads across screens via TrueView, YouTube's personalized and targeted advertising interface (Brittin, 2015; YouTube, 2015). The recent Oreo licking scandal tells its own story about product placement and the potential for unfair advantages that this form of advertising within YouTube content is perceived to pose. In 2014, numerous YouTube stars staged and competed in a series of 'Lick Race Challenges' of Oreo biscuits, without making it clear that the sponsorship behind these 'races' came from Oreo's producers Mondelez UK. This resulted in a complaint by the BBC to the Advertising Standards Authority (ASA), the UK's independent regulator of advertising. In November 2014, the ASA ruled that Mondelez UK should remove the races and clarify the commercial intent of future Oreo licking activity on YouTube (ASA, 2014).

The gatekeepers

As the business models of short-form, funded and distributed outside of traditional outlets are maturing, the production sector and the power dynamics within it must be seen in a wider perspective. Although the PewDiePies of this world are arguable as much producers and broadcasters as the BBC is, gatekeeping and the ability to be noticed in this supersaturated market of content is as, if not more, important than ever before. Marcus Herbert, head of Online at BBC Scotland, puts it this way, 'it used to be that content was king, but today, content *discovery* that is king' (my italics)[2]. It is therefore those organizations who can aggregate, distribute and promote content that make or break a content maker, and today, these are not just legacy broadcasters and studios but also aggregators like Google's YouTube; VOD platforms like Amazon Prime, Now.TV and Netflix; telecoms providers like British Telecom (BT); and platforms like Twitter and Facebook. Despite the persistence of myths of democratization and empowerment that surround digital production, it is still these gatekeepers that determine what content reaches a niche or mass audience, and there is an oligopolistic concentration of these companies, rather than a diversification. This is in line with a general tendency towards consolidation, horizontal and vertical integration among media companies across the Internet, as for example, Doyle (2013b), Van Dijck (2013), Vukanovic (2009) and The Media Reform Coalition (2015) have observed.

Moreover, today, the aggregators and telecom providers are as important players and gatekeepers as the legacy broadcasters. Although the aggregators' and telecoms' core business models and activities, structure and spend on content production differ from the broadcasters', they increasingly seek to perform the same functions. Amazon Prime and Netflix are aggregating, curating and commissioning new drama content (Curtin et al., 2014a: 12, 2014c). BT has set up VOD channels. Google's CEO Eric Smith delivered the Edinburgh International Television Festival's leading and most prestigious keynote, the McTaggart lecture, in 2009. Looking at Google from a search and aggregator point of view, YouTube can be described as the world's largest crowdsourced content platform, but it is also a platform for new stations as well as the home for legacy broadcasters, for example, Channel 4's 260,000 subscribers, BBC's 2.8 million subscribers, BBC Radio One's 2.6 million subscribers and Freemantle's 24 million subscribers. Thinking about commissioned content in a broader perspective, Google

is currently consolidating existing content and content providers in 'channels' as well as merging advertising and drama by experimenting with ways to facilitate new forms of narrative, storified and personalized advertising on YouTube through micro-movie advertising (Brittin, 2015). In an ironical reverse and intertwined business model, YouTube recently announced a subscription service, YouTube Red, which would enable users to enjoy advertisement-free YouTube content browsing.

From a commissioning, production and distribution perspective, there is little difference between the status and activities of telecoms, aggregators, TV networks and broadcasters. This was also evident at the sponsored events, hubs, drinks and lunches at the Edinburgh International Television Festival. There was a BT hub with a BT lunch on the Thursday night. The digital rerun channel, Dave, threw the pre-festival party and ITV sponsored the official opening festival drinks at the National Museum of Scotland. Sky had a massive lounge with drinks and pop-up art happenings – opera, a chamber orchestra and a portrait competition with Armando Iannucci as a model. BBC1, BBC2 and Channel 4 sponsored drinks parties while Now.TV offered pick n' mix sweets. Legacy broadcasters, VOD and streaming services and telecommunication corporations mixed seamlessly amidst the bustle.

Again, these changes to, and concentrations and conflations of, the organizations that commission, fund and distribute content have many implications for the British independent production sector. There are two intertwined points worth noting about these omnipresent and potent gatekeepers. First, they are predominantly 'not British', and second, because they are online and transnational, they are not regulated by British legislation or the UK telecommunications regulator Ofcom. This has, at least, three implications for the mediascape in the United Kingdom in terms of ownership, pluralism and regulation.

First, a large proportion of British independent producers, media companies and broadcasters are now US owned. The consolidation of the UK production companies into superindies in the 2000s meant that a large part of the UK independent production sector today comes under foreign, predominantly American, ownership. Increasingly, this is also the case for formerly British broadcasters. While the BBC and Channel 4 are still owned by the British public, many other media organizations in the United Kingdom are US owned: Virgin Media by the Liberty Global, and Five is under the ownership of Viacom International. This is very much the case online, where the American Alphabet is both the parent company of the world leading video streaming platform YouTube and the search engine Google. Google accounts for 95.8% of mobile searches and 88% of desktop searches in the United Kingdom (The Media Reform Coalition, 2015: 12), and its searches naturally direct video traffic to YouTube. Although foreign, commercial and oligopolistic ownership of the content industry in Britain is not perceived as a problem by some, many others would argue that this is a cause for concern for pluralism in the UK mediascape. It also raises questions about what purpose – commercial, public service, or a mix of both – and whose interests – shareholders, consumers or citizen – are being and should be served by the media content industry in the United Kingdom. These concerns also apply to the media industry within the European context.

Second, in the United Kingdom, broadcasting licenses are allocated and regulated by Ofcom's Broadcasting Code. This setup ensures pluralism in terms of both content and media outlets.[3] Online anyone can broadcast, as we have seen, but the platforms that they can do so from are owned by transnational and increasingly oligopolistic media corporations such as Google and Facebook. Ofcom notes that Brits increasingly access online content only through sites, apps and SNSs that they have used before (42% in 2016 up from 31% in 2014; 2016b: 9), which furthers

media concentration and tends to a reduction in plurality of media outlets and content. In terms of content, these corporations allow or disallow to 'broadcast yourself' as YouTube's motto once was, according to their own standards. These standards are set by the corporations themselves and not subject to national policies or regulation (Ibrus and Rohn, 2016). In addition to the arbitrary and draconic algorithmic policing of content according to restricted keywords or notions of appropriateness (as illustrated by, e.g. the removal of a town called Effin, women called Isis, and breastfeeding campaigns removed from Facebook pages and YouTube channels), there are more serious concerns for the British TV industry. Licenced broadcasters and in particular Public Service Broadcasters in the United Kingdom are required by law to ensure plurality, diversity and a variety of voices in their content, and balanced political standpoints through their remits, as set out and defined in Ofcom's Broadcasting Code. In addition to promoting a culture of high journalistic standards which serves invaluable democratic purposes, this also serves to address the diverse needs, interests and concerns of the public. Furthermore, if you are unfairly treated, represented or discriminated against by a British broadcaster, you can complain to Ofcom. There is no such direct recourse online.

Third, Public Service Broadcasters sustain the British screen industries. They are obliged to support the independent production sector in the United Kingdom by commissioning a certain percentage of their content from independents across the country. BBC and ITV are required to commission between 25% and 50% of their content from British independents, and Channel 4 and Five commission all of their content, apart from acquisitions, in this way. This mechanism supports and sustains the indigenous industry in the United Kingdom economically. Also, this furthers pluralism in content by warranting that this is commissioned from a variety of producers and production companies across the United Kingdom. The European Commission's Audiovisual Media Services Directive (AVMSD) stipulates that 50% of all programmes of European broadcasters have to originate from Europe and 10% must be produced by European independent producers (2016). There are no comparable requirements or obligations placed on global or transnational aggregators, SNS and telecoms companies.

TV today

With the proliferation of devices, producers, platforms and production methods, critical attention has focused increasingly on what, then, constitutes TV. In their introduction to *Television in the Post-Broadcast Era*, Turner and Tay set out to rethink 'the changing nature of television: Its content; its production; how and when it is consumed'. They write, '[n]ow it is absolutely clear that we can no longer talk about "TV" as if it were a singular entity, if we have any chance of adequately understanding the contemporary social, cultural and political functions of the media' (2009: 2–3). Two years later, Bennett and Strange freed TV content from its medium specificity in *Television as Digital Media* (2011) and in 2012, Netflix's Ted Sarandos stated: 'we really believe the *digital* future of television is *the* future of television. I don't think it is controversial to say that the Internet will replace the cable box as the primary mechanism for television within the next twenty years' (as cited in Curtin et al., 2014c: 134). Johnston argues that this is already happening and that in the United Kingdom, 'online TV' is now the norm (2015), and in an European context, Ibrus and Rohn argue that this is implicit in the wording of the proposed update of the AVMSD (2016). Boyle takes this to its logical conclusion and writes, '[d]iscussion of old and new media is

largely redundant in the digital age. While even the term *digital media* is becoming superfluous, we simply have a media environment with various platforms, screens and the content across those screens' (2014: 747). This is the context within which TV content and the industry that produces it need to be seen.

Today then, TV content is multifaceted, of various length and forms. It is distributed on a variety of platforms and across devise and screens. Yet, as many have observed, traditional viewing patterns and audience behaviours persist. Ofcom data shows that 88% of the UK audience watch TV as it is broadcast (Ofcom, 2015a: 10). With 165.5 million cinema admissions in 2013 (BFI, 2014: 8), the UK box office last year took home over £1.1 billion for the fifth year running (UK Cinema Association, 2015). More YouTube videos are being watched than ever before (YouTube, 2015). While old viewing patterns prevail, new ones are developing too. Mobile technology and the ability to watch content anywhere on any size screen add additional complexity and new behaviours to these traditional viewing patterns. In the Edinburgh International Television Festival's Digital Keynote, Matt Brittin, president of business and operations at Google, described these new behaviours as 'as well as', 'not instead' of established viewing patterns. These additional viewing behaviours manifest themselves in at least three ways that have precipitated the changes to the TV industry that have been discussed in the preceding pages.

First, and following on from Boyle, insisting on differences between media – 'film', TV or 'digital' – is redundant. In purely technical terms, the difference between film, TV and digital/online as media is the difference between screen sizes and ratios, recording technology and versions of high definition and lower resolutions. Indeed most film is shot on digital and it is no longer possible to get 35-mm films processed in the United Kingdom (Dawson and Holmes, 2014). Similarly, screen sizes are interchangeable. The screen ratio and resolution of any new content are simply formatting issues. With Google's Chrome Cast extension that converts any kind of format to the operating system, ratio and optimum resolution of any screen, content is effortlessly interchanged between different devices and screens. The YouTube app for smart TVs preforms that same function. As both movies and Lolcat videos can be watched on a mobile, a laptop or a widescreen TV, it is not only the media specificity that is rendered pointless, but devices and screen sizes become increasingly irrelevant for most types of content. Although the European AVMSD's definition of 'TV-like' services is both problematic and interpreted differently by member states, it explicitly seeks to avoid defining TV in relation to screen sizes, delivery forms, platforms and specs in its reference to 'technological neutrality' (European Commission, 2016). This is a point also made by several industry leaders for example Time Warner's Jeff Bewkes in 2011 (FinancialTimesLive, 2013), BermanBraun's Gail Berman (Curtin et al., 2014b: 93) and Google's Brittin 2015.

From a screen industries and screen worker perspective, most content producers create content for a variety of screens (cinema, TV, tablets, smartphones and other mobile screens) depending on the requirements of the specific job. For producers and industry, content is simply content.

Second, while some content is intended for being seen in certain settings, for example, in the cinema or on TV, uses and viewing contexts vary. Many prefer to see YouTube videos on their tablet and 'films' in the cinema, but the same people will opt to see that same movie on a tablet on a plane. Others will not care about screen sizes at all. The point here is that this is an experiential choice. It is not an essential or inherent property of the content. For the users/audiences, viewing experience and setting depend on the context of the content.

Third, in a world where content is portable and ubiquitous, the uses of this content proliferate and with that notions of what constitutes 'quality'. Brittin succinctly notes that what is considered quality depends on the purpose, use and intent of the content (2015). If, for example, you are looking for a YouTube video to teach you how to fix a radiator, unblock a toilet, do a French plait or learn to hula hoop, what matters is how well this is explained, not the production values of the piece, the quality of the sound design or the skill of the cameraman. Conversely, as TV drama series and documentaries premiere and win acclaim at Cannes, Berlin and Toronto film festivals, what is being celebrated, contested and admired is not only storytelling but increasingly the production values and talent. As ever, the difference between high-end award-winning drama and other content depends on budgets as well as on social and cultural capital and power dynamics. It is thought-provoking how many recent Oscars and Baftas have gone to post-production and special effects extravaganzas such as *Drive*, *Rush*, *Skyfall* and *Gravity*. Here, what is deemed as award-winning seems to depend increasingly on production values as much as than underlying narrative elements. High-end drama and documentary command on- and off-screen talent, set designs and post-production values and effects that are beyond the reach and capability of the average YouTuber. Through this lens, the notion of quality that currently underpins awards like the Oscars, Emmys and Baftas could been seen as a construct created by the film industry to differentiate itself from the onslaught of other media producers. In a multiscreen context, however, any analysis, assessment or assertion of quality needs to take into account the intentions behind the content, its uses, as well as the combinations of social, cultural and economic reality that it emerges from and that surrounds it. Across multiple screens, quality resides in the context of the content.

Final remarks

TV, then, transcend technology, media specificity, and established industry structures, funding, production, and distribution forms.

The Edinburgh International Television Festival is, today, a gathering of international screen industry workers who produce content of various forms, lengths and levels of interactivity, distributed and accessed across multiple devices, screens and platforms.

Without wishing to conflate the artistic expressions of Vines and award-winning drama, the audiences consume a diverse range of content on a variety of screens. Preferences for form, type of content and screen sizes vary between demographics, age groups and lifestyles, but it is beyond doubt that more content is produced and consumed than ever before and that the quality of this is assessed and valued in a variety of ways. Returning to Burgess' point, both the production and consumption of content form part of the same cultural practice.

Although more audiovisual content is being consumed and higher budgets are being invested in content, the British TV industry and production sector are facing pressures in relation to economies of scale and scope as described here. As a sector that traditionally has been dominated by small- to medium-sized independents, it is now finding itself squeezed between on the one hand vloggers and self-casters and on the other vertically and horizontally integrated multinationals. Therefore, British TV industry today must be seen in a wider context, competing and co-existing with a plethora of multinationals, production outfits and individual producers pursuing and producing a multiplicity of products and programmes.

As demarcation lines between media, devices and screens become increasingly irrelevant and what is considered quality is being redefined, questions might be raised about whether is it still constructive to treat film, digital and TV as distinct forms of expression from other forms of

audiovisual media, as is the practise with public arts organizations and funders, as well as in some university departments. Rather, it might well be more pertinent to explore and approach the screen industries and their outputs from the perspective of the varying business models, actual industry configurations, production and distribution practices that can be observed across the screen industries today.

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Notes

1. This 4G subscription data was collected by the of 2014, so today this figure is likely to have increased.
2. Herbert was speaking at the Scotland, Public Service Broadcasting & the Broadcasting Landscape conference organized by Centre for Cultural Policy Research (CCPR), Royal Society for the encouragement of Arts, Manufactures and Commerce (RSA), Scottish Media & Communication Association (SMCA) and Voice of the Listener and Viewer (VLV) at the University of Glasgow, United Kingdom, 13 January 2016.
3. Although this is not the central concern of this article, it is important to note that there are various definitions of pluralism. Raeijmaekers and Maeseele differentiate between four different normative and conceptual understandings of pluralism corresponding to various schools of democracy and the role the media plays within these (2015).

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