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**Media, Culture and Society Special Issue:  
MCS No 7, 2019**

**The Television Industry in the Multi-Platform Environment**  
*Edited by Raymond Boyle*

**Introduction**

The once relatively stable television industry has undergone significant changes in recent years driven by a range of technological, political, economic and cultural factors. The disaggregation of television content from television distribution platforms has changed the industry significantly. While the growth of multi-platform distribution networks has impacted on both legacy television organizations and content creators, as well as regulators navigating a more, fluid and complex digital environment. As a result of the growing integration of telecommunications, broadcast and Internet networks the television industry has become a strategic battleground for relevant national and international public, private and commercial organizational stakeholders.

Historically it has been the State that has traditionally valued the industry for its public service, cultural and political importance as well as its commercial and industrial value, and as a result has organized and created frameworks of national television industry regulation. However the new configurations being created around the multi-platform international distribution of television content raises a range of issues around the cultural and political value and nature of what we understand to be television; the regulatory challenges faced by governments and the implications for public service content of the developing business models within an industry no longer solely dominated by once recognizable television institutions and organizations.

This special issue of *Media, Culture and Society* examines some of the current issues that are being played out across the international television industry. It argues that while we are witnessing significant change, patterns of continuity are also evident. To what extent does the national still play an important role in shaping the contours of television culture within an increasingly crowded environment? Is there a long term role for legacy television organizations in an environment increasingly influenced by technology companies and OTT (Over-The-Top) subscription based models of funding and distribution?

**The Television and Device Ecology**

In her investigation into post-network industrial practices in the US television market Amanda Lotz's article *Teasing Apart Television Industry Disruption: Consequences of Meso-Level Financing Practices Before and After the U.S. Multiplatform Era* argues that focusing on technological disruption alone only offers a partial picture of a more complex environment. She recognises the challenges this presents for scholars examining this area as it requires disentangling technological, industrial and financial drivers of change. In her piece grounded with its analysis of HBO and Netflix, Lotz also takes the longer

historical perspective in identifying key funding and revenue model shifts that while they pre-date the internet play a central role in shaping the contemporary television sector in the US. She also sets out some of the challenges faced by scholars researching in this field and notes the need for more work that connects the political economy and critical media industries analysis to that which examines the impact on the texts that are being produced and engaged with by audiences in the US.

This very issue is addressed by Gillian Doyle and Kenny Barr in the next article *After the Gold Rush: Industrial Re-configuration in the UK Television Production Sector and Content* that focuses on the particularities of the UK television market. This research, drawing on a major Economic and Social Research Council (ESRC) funded project, investigates the relationship between media ownership, issues of control and implications for television content. Drawing on both original market analysis of the UK independent television production sector and on interviews with senior television executives it sets out to empirically road test often widely accepted assumptions that non-UK ownership of television production companies is liable to have a detrimental impact on quality and types of television programmes produced.

Their case studies highlight the complexity of the situation and they argue against any easy reading across between patterns of ownership and the range of television programme production. They suggest that short term changing ownership patterns have had little impact on the creative leadership within many television production companies and that the role of the seller is often as important in this process as that of the multi-national non-UK company that is seeking to acquire these companies. What emerges is a complex interplay between global trends in the television sector and the continuing importance that more national (in this case UK) policy driven intervention in this area of cultural production continues to play in shaping the nature of both national television markets and the television industry.

The David Hesmondhalgh and Ramon Lobato article *Television Device Ecologies, Prominence and Datafication: the Neglected Importance of the Set-Top Box*, identifies an under researched area of the television landscape, that of the set-top box (STB) and its central role it plays in the distribution, selection and recommendation of television related content. This article represents part of what is sometimes called the 'infrastructural turn' in media studies that sees scholars focusing on the often over-looked role that hardware and its shifting relationship with software plays in contemporary television distribution and culture. This research offers a re-framing of how we might understand television in the multi-platform age and argues that the humble STB continues to play a crucial role as part of a wider 'device ecology' that is shaping the infrastructure of the television industry.

The authors identify two key related areas in which the STB and subsequent devices such as Google Chromecast and Amazon Fire TV are implicated. These are the role they play in the prominence and discoverability of television content and also their function to collection, analysis and exchange audience and other

forms of data. This article seeks to add to the growing literature within media and communication studies that focuses on the important role these everyday domestic devices play in the broader television ecology and culture. In so doing they argue that engaging with the consumer electronics and information technology aspects of television and content infrastructure is not something the field should simply leave to those researchers working in other disciplines beyond media and communication.

### **Content and Beyond Television**

The Brett Hutchins, Bo Li and David Rowe article *Over-the-Top Sport: Live Streaming Services, Changing Coverage Rights Markets, and the Growth of Media Sport Portals*, offers an empirical study of one of the most commercially valuable areas of television content, sport. It examines the relationship between sports rights and the rise of OTT companies that mobilise sport as part of their strategic offering. Drawing heavily on the notion of portals, Hutchins identifies what they argue are six key characteristics of media sports portals. With its liveness, emotion and appeal to identity sports events or sports related content has become part of the OTT landscape.

They examine three OTT companies the Chinese based Tencent Video, the originally UK based but now international DAZN company and Amazon Prime Video. They argue that the growth of OTT sports related portals has had a major impact on shifting sport away from its original broadcasting environment, yet at the same time retaining many recognisable aspects of television sports coverage. They also raise questions and highlight the challenges that this shift has on the historical position that sports have played in terms of symbolic collective and public culture and the medium's relationship of addressing the audience as citizens.

Continuing the Chinese related focus, Anthony Fung's research *Technologization of Everyday Life: post television, social media and China*, is concerned with the online television network of fans in China. Using Tencent Video as a case study Fung traces how the television arm of the company works with the online platform within the Chinese market. The research traces the relationships being established and built working across the social video and online environment and the more traditional television content environment. This research is also interested in how the wider political culture with regard to regulatory control of the internet in China plays into this area of television and social video culture in that country and in so doing helps shape audience discourses around particular forms of media content.

Although examining the Chinese market, Fung's research reaches beyond this and places his work within the emerging research around online audiences and the wider impact that the digitization of the television ecology is having on what we understand is meant by the term television itself. At the same time, the article is a timely reminder of the ongoing importance of the role that the political culture of the national continues to play in shaping seemingly universal or global shifts in the relationship between producers and consumers of

television related content.

The final piece in this special issue *Public service media beyond the digital hype* by Karen Donders investigates the challenges that many of the issues discussed in the earlier articles, including the rise of the platform television ecology, are posing for public service broadcasters (PSBs) across various European countries and markets. Donders analyses the strategic responses of the PSB sector to the shifts in audience patterns of television consumption and the attempts by institutions to transition to fully fledged digital public service media providers and operators. What emerges from the research is a variable set of responses from PSB providers, that in some cases sees lip service being paid to moving content online without a longer-term strategic vision of how PSB will remain crucial and relevant in such a fast-moving television environment. Donders research raises questions about the universal ability of key PSBs to position themselves in this more complex media environment where they can appear to be playing catch up with their audience.

Collectively this special issue of *Media, Culture and Society*, drawing on work from Australia, China, across Europe and the USA, offers a snapshot of an industry in transition as patterns in the production, distribution and consumption of television content continue to evolve and develop at pace. Despite these changes and the often premature announcement of the death of television, investigating and understanding the shifting production and organizational context of television content across all its various technological platforms will, I am sure, continue to remain a concern of the journal over the coming years.

Raymond Boyle, June , 2019.