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Markets and Meanings

The Global Syndication of Television Programming

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Although television did not exist at the beginning of the last century, today it is the most common form of visual entertainment worldwide, providing a means of readily accessible and relatively inexpensive entertainment for hundreds of millions of households. Not only is the television industry a major source of revenue for exporting nations, increasingly it is an organizational form of production that spans borders. Each year, four major international conventions bring together members of media industries for the marketing and purchase of television programs. Those gatherings — the NATPE convention, which is organized by the National Association of Television Program Executives and held in the United States every winter; MIPCOM and MIP-TV, which are the Midem Organization of France's annual fall and spring events, held in Monte Carlo; and the by-invitation-only L.A. Screenings, which are held in June in hotel rooms and studios throughout Los Angeles — serve as the international crossroads for the buyers and sellers of television programming. Attendance at each of these venues can number in the tens of thousands and draw participants from every region of the globe. By way of illustration, the number of registered participants at the NATPE convention in New Orleans in January of 2000 exceeded 17,500, including more than 4,300 from foreign countries. Thirty-nine percent of the exhibitors represented countries other than the United States (NATPE *Facts*, February 28, 2000).

The growth of these industry gatherings in the last three decades into major international marketplaces for the exchange of television programs is a direct consequence of the economic robustness of television production in the latter part of the twentieth century. Revenues generated are considerable, and the international market for programs is an extraordinarily lucrative source of profit for major production companies.¹

In this chapter we analyze the world of American television programming as a cultural product for export abroad, as part of a larger project on global television. We examine the "culture world" of television production, relying upon Diana Crane's

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(1992) conceptualization, which expands Howard Becker's (1982) notion of art worlds to include the specific roles of organizations and audiences.² To study the American television industry's perceptions of its audiences outside the United States and the ways in which its foreign counterparts perceive American television entertainment, we focus upon the constraints that the world of television production faces as it markets its products internationally. In particular, we analyze factors that affect how and why American television series are modified in preparation for export abroad.

Our approach to this topic is unique in several ways. First, we bring a sociological view to the study of what traditionally has been in the purview of communications scholars. While their research typically focuses on the efficacy and consequence of the communicative process, our perspective addresses the social, organizational, and interpersonal processes that underlie, construct, and inform television as a cultural product. Second, our work differs from most sociological research on the topic. Whereas others analyze television as a market or as an industrial system, we focus upon its micro-organizational accomplishment. In extending the concept of culture world to the international market for television, we consider explicitly how the medium evolved from a domestic product to one that is global in scope, and how collective action is accomplished when participants come from all parts of the world. In particular, we examine how issues of meaning arising in a cross-cultural context shape business strategies, decisions, and outcomes.

We emphasize that our analysis is necessarily restricted to a "snapshot" of the worldwide syndication process, given the frequency and rapidity with which the global television industry transforms. As Muriel Cantor and Joel Cantor noted in 1986, television import/export is a chaotic business in a chaotic market; that statement is even truer today. The workings of the international culture world of television are revealed in myriad ways, and therefore we draw upon multiple sources of information. For this chapter we draw upon interviews with seven executive-level managers, data collected through participant observation at two industry conventions, and observations from continuing fieldwork at companies within the industry.³ In our analysis, we restrict our focus to television series themselves, forgoing attention to the consequences of new technologies and systems of distribution upon the international marketplace. While those developments are of consequence to the viability of the marketplace for television programming, they have not affected the content of what is produced for export. We focus instead on characteristics of the cultural product itself as part of the business of the international marketplace.

The Domestic Television Industry and International Television Flows

Communications scholars have led the study of exported television. Consistent with their interest in understanding the exchange and impact of information, their scholarship has focused largely upon identifying the flows of programming from one country to another and the major national exporters in the global arena (see Mohammadi 1997).⁴ The earliest attempts at systematic documentation of exported television programming revealed that by the early 1970s, the United States, Britain, France, and

the Federal Republic of Germany were leaders in its origination (Nordenstreng and Varis 1974). According to that research, the United States led this group with an estimated 150,000 hours of programming per year, followed by the United Kingdom and France, estimated at 20,000 hours each. West Germany exported approximately 6,000 hours.⁵

To some extent these statistics merely reflect the number of hours of airtime that needed to be filled in newly emerging national television systems.⁶ For the most part, the leaders in exported programming sent their programs to countries whose broadcast systems were sufficiently developed to have schedules to fill, or who shared the same language. Moreover, by no means did the number of hours reported indicate that programming from any one exporter dominated the globe. In the early 1970s, for example, the United States exported programming primarily to Canada, Australia, Japan, and Western Europe (Varis 1974). Programming from the French commercial group went to Europe, North America, Japan, and 10 French-speaking African countries, with Zaire and Tunisia being the major receivers on that continent. West Germany was a major exporter within Western Europe but had limited presence beyond that sphere because German is spoken in relatively few countries.

While these nations were the largest exporters, several other countries were major producers of programming for international distribution in other regional markets. For example, programs from Mexico were widely distributed throughout Latin America and in areas of the United States where Spanish is widely spoken, and Lebanon and the United Arab Republic were major producers for the Middle East. Analyses of flows among non-Western countries published a decade after Nordenstreng and Varis's first major study show that among Third World countries there was no substantial change in the use of foreign programming (Varis 1986). Among those flows was, however, a trend toward greater intra regional exchange, especially among Arab countries and also within Latin America. Countries with large internal markets, such as Brazil's television and India's film industries, now supply not only their own markets but also send exports internationally (Varis 1984).

Still debated among scholars is the question of whether expansion of international media flows is a mechanism for both economic and ideological cultural domination, specifically by the United States (see Schiller 1991). The so-called cultural imperialist view refers to "the domination of one country's system of symbolically producing and reproducing constructed realities over another's production and re-production of self-identity" (De la Garde 1993:27).⁷ The most significant opposing view has come to be known as the "active audience" perspective, which argues that the response of actual viewers to imported products is complicated and nuanced, which problematizes any straightforward notions of "domination." According to Ien Ang, "it is hard to distinguish . . . between the 'foreign' and the 'indigenous,' the 'imperialist' and the 'authentic': what has emerged is a highly distinctive and economically viable hybrid cultural form in which the global and the local are inextricably intertwined" (1996:154; see also McAnany and Wilkenson 1992; Schwoch 1993). Research has addressed the cultural domination thesis at a number of different levels, though this focus is beyond the scope of the analysis reported here.⁸

Relevant to the debate over cultural dominance is the ratio of imported to domestically broadcast programming. Nordenstreng and Varis's 1974 UNESCO report relied upon questionnaire data collected from more than 50 countries to analyze the general content and percentages of imported versus domestic programming.⁹ In this study, the first ever of the direction of exported television, the authors revealed that American programming prevailed in the global market, followed by British programming, and that entertainment programming comprised a greater portion of the imported product than did other forms, such as news.¹⁰ In a more recent study of Latin American television broadcasters in Mexico, Peru, Argentina, Brazil, and Venezuela, Livia Antola and Everett Rogers (1984) argued that examining "audience-hours" (i.e., the number of hours divided by size of audience for each program) provides a more realistic assessment of exposure to imported programming and demonstrates that it is substantially lower than proponents of the dominance thesis imply. Within Mexico in 1982, the year of Antola and Rogers' study, the 50 percent of programming hours filled by imported programs translated into one third of the total possible audience-hours of viewing. Moreover, of four available channels, only two carried a high proportion of imported programs.

The significance of these figures for Mexico was borne out in interviews conducted by Antola and Rogers with Latin American television broadcasters in Venezuela, Brazil, Argentina, Chile, Mexico, and Peru regarding viewers' preferences for domestically produced versus imported programs. According to the executives interviewed, audience preferences ranked in the following descending order: locally produced programs, imports from other Latin American countries, and last, programs from the United States (which was the source of the greatest percentage of imported programs). Lina Davis (1997) found a similar pattern of viewing preferences in Ecuador, a smaller and less developed country than those studied by Antola and Rogers. These findings support notions of a cultural discount, or "cross-border reduction in value." As Hoskins and Mirus suggest, "A particular programme rooted in one culture, and thus attractive in that environment, will have a diminished appeal elsewhere" (1988:500; see also Straubhaar 1991). The discount is less in entertainment genres than in other categories, which Hoskins and Mirus argue is the single biggest reason why entertainment-based programming (rather than education- and/or information-based) dominates international flows (1988:501).

Tamar Liebes and Eliku Katz (1990) suggest that some genres originating in Western cultures, such as serialized dramas, have an inherent cultural power that makes them accessible and appealing in almost every region where they are imported. Serials are believed to have a unique ability to "explore apparently global themes in more specifically local ways" (Barker 1997:93; see also Borchers 1989; Liebes and Katz 1990; Lopez 1995). Their narrative structure, which leaves them open to a wider variety of cultural readings than other forms of programming, also contributes to serials' success on the global syndication market (Allen 1997). While U.S. viewers are most familiar with serials in the form of daytime soap operas (originating on radio in the 1930s and moving to television in the early 1950s), there is an astonishing diversity of serial narratives worldwide (Allen 1997; McAnany and La Pastina 1994). Today, Latin American serials (or telenovelas) are the most exported television

products in the world, with Brazil the most prolific producer and exporter (O'Donnell 1999:3; see also Allen 1996).

While much of the literature on serials' global success focuses on content or genre characteristics, recent scholarship indicates that concrete and local programming practices may actually be more instrumental in shaping viewing preferences. For example, Stuart Cunningham and Elizabeth Jacka (1994) identified factors other than genre that accorded success in the United Kingdom of the Australian soap import *Neighbors*. On one hand, they found that certain cultural themes (e.g., the youthfulness and "whiteness" of the cast, and the historic ties between Australia and Britain) resonated with the audience. On the other hand, they emphasize that crucial to the success of *Neighbors* were aspects seemingly as mundane as placement on the network schedule (early and late afternoons, five days per week) and reaching the target demographic (the "youth" audience). In this instance, specific programming strategies were successful in placing the series before an audience that would both find it and appreciate its meaning.¹¹ Conversely, *Neighbors* failed to catch on with U.S. viewers for reasons partly related to content/genre (e.g., the show's "nonexceptional realism"), but mostly due to factors such as "gridlock" scheduling and the brevity of the show's run (Crofts 1995:112).

While issues of genre continue to be relevant, these findings underscore the importance of focusing primarily upon "middle-range" factors in understanding how and where imported programming comes to dominate audience preferences. Cantor and Cantor (1986) advocate this strategy in the conclusion of their exploratory study of the international marketplace of American television. They noted that "the production and distribution of American programs abroad is a complex and intricate process, involving many players both in the United States and abroad—including the audience." They go on to conclude that "the time has now arrived for communication researchers to move away from a model of direct, single-centered, and worldwide influence to one that functions as interactive, multicentered, and regional" (Cantor and Cantor 1986:518).

Research on exported media identifies numerous factors that potentially affect the direction and extent of its flow and may occur either in production or distribution of a media product (Mowlana 1997:34). We follow the lead of Mowlana and of Cantor and Cantor by exploring in detail the production and distribution of internationally syndicated U.S. programming in the context of specific marketplaces, taking into consideration that the market is shaped by formal, legal, and technical constraints on the one hand, and by informal rules and understandings rooted in culture and ideology on the other. Below we discuss some of these factors, organized by topic so that we are able to emphasize national or cultural variation across countries or regions of the globe.

Issues in Production and Distribution for Syndication to Foreign Markets

Language, Translation, and Culture

As we noted above in our discussion of the initial UNESCO report on television flows (Nordenstreng and Varis 1974), exports were constrained by language from the very

beginning. At first, U.S. exports, for example, exports went to other English-speaking countries, with the exception of Japan. Language differences can be surmounted by subtitles or dubbing, but a fundamental consideration for both buyers and sellers is literacy rates of purchasing countries. Literacy is a precondition for subtitling, of course, but not for dubbing. A representative from China to the 1998 NATPE convention told us that imported programming is always dubbed because 25 percent of the country is illiterate; translations and dubbing are done in China.¹² A related factor affecting the decision to subtitle versus dub (which may be the determining factor in whether a program can be purchased) is economic cost. Dubbing, though necessary for some purchasing countries, costs 5 to 10 times as much as subtitling (Van der Weel 1990:23).

Antola and Rogers's (1984) study of Latin American countries, discussed above, reported that Mexico was the gatekeeper for translations of all products sold to Latin American countries. According to their research, Mexico inherited that role from Cuba, where nearly all dubbing for Latin America was conducted until the 1959 revolution. Because of Mexico's established film industry, it possessed the organizational infrastructure and talent to take over the task. Mexico's role as gatekeeper eventually grew in importance because more often than not individual countries were unable to provide sufficient revenue to exporters that would also cover the cost of dubbing products into Spanish.¹³

One reason for the vested interest among Latin American buyers in maintaining the location of dubbing and translation in Mexico (Mexico City, to be exact) is that it makes censorship easier. At the time of Antola and Rogers's research, cultural policy was that certain types of stories were not allowed in imported products (for example, kidnapping, references to guerrillas, and depictions of certain types of sexual behavior); episodes with this program content were simply edited out. In addition, certain English words are censored in their Spanish translation. Indeed, a coordinator of acquisitions for the Fox Latin American Channel told us that to this day, buyers from Latin America are surprised ("shocked" was her term) at the vulgarity in American television and struggle with whether potential acquisitions can be made acceptable to their audiences.

As the above examples illustrate, at some point the constraints on preparing an exported series for airing extend well beyond technological considerations and into matters of cultural adequacy in the broadest sense. One of us, while traveling in Italy in 1999, learned firsthand some of the more subtle ways in which a series is adapted to local cultural interests. In that instance, it was the prime-time sitcom "The Nanny" (which first aired in the United States on CBS and is distributed internationally by Columbia Tristar International Television). As an import it was dubbed; Fran Drescher's "fingernails on a chalkboard" voice was closely mimicked (as was just about every other American actor's voice in television and films imported to Italy, including many former stars like James Cagney and Humphrey Bogart). What came as a surprise, however, was learning from Italian viewers that Drescher's character was not Jewish as it is in the original American version; instead, she was Sicilian and her voice was dubbed into a distinctly Sicilian dialect. Indeed, local viewers informed us that Sicilian accents are dubbed for any character who is considered to be "a gangster" or otherwise a foil for cultural propriety.

Italian voice-over artists take pride in being among the most professional and expert in the world. The country's 1,050 dubbers, representing 80 companies, are unionized, with the best becoming "stars in their own right" within Italy (Boudreaux 1998). In their case, participation in the culture world of internationally syndicated programs contributes in crucial ways to the meaning of imported programs for Italian audiences. Dubber Mario Paolinelli explained, "For viewers, hearing our voices is like having close friends at home. If the characters speak a different language, they're not friends anymore" (Boudreaux 1998). When successful, this kind of intervention literally transforms the product into one that genuinely incorporates local cultural meaning.

A melding of technical and cultural considerations happens in other ways as well. For example, audio dubbing is done "split track," which breaks out the voice track from the musical track. This is done because buyers in some countries wish to retain the American music as a feature of the imported production, which their audiences actively seek out as a reason for viewing. The program buyer from Lithuania whom we spoke with at the 1998 NATPE convention explained that her country dubs its programming but preserves the original soundtrack and sound effects, "whose quality is valued and should not be sacrificed." Even this approach to music is complicated, as a senior project manager at Paramount who oversees distribution of programming to Europe pointed out to us: because lyrics are the focal point of some songs, they are often left untranslated and are heard in English.

Entertainment and Cultural Limits

As noted earlier, entertainment-based (rather than information- or education-based) programming dominates international television flows (Hoskins and Mirus 1988), though countries vary in the proportion of network schedules devoted to entertainment. In 1974, Nordenstreng and Varis showed that entertainment programming typically predominates when a network is commercially owned and operated rather than noncommercial or state owned. In Japan, for example, where both network forms exist, Nordenstreng and Varis showed that commercial stations devoted 80 percent of air-time to entertainment programming, in contrast to the noncommercial NHK, which allocated just one-third of its total time to such programs (1974:17). A more recent example is the current shift in the European television system (beginning in the 1970s and 1980s) away from a public service tradition toward privatization and a market economy (Owen and Wildman 1992). According to Ole Prehn and Else Jensen, "While the emphasis in the U.S. is on entertainment and large audiences, the European tradition has been to offer people a variety of programs, which may not always attract large audiences but nevertheless are of cultural and political importance. During the last decade, this tradition has been challenged both by the proliferation of channels and by the political climate favouring a market oriented approach" (1993:221). In short, entertainment television is on the rise throughout Europe.¹⁴

Although critics of the effects of the international market often presume such products are immutable and exported without modification, we find otherwise. Indeed, those involved on the production and distribution side of international syndication as

well as buyers in receiving countries recognize that many aspects of television programming, like any other cultural product, do not necessarily translate across borders and must be adapted to do so. As a result, some genres of programs are selectively marketed to specific regions, producers and syndicators often allow buyers to control editing and other modifications for their markets, and producers sometimes avoid certain themes and language in anticipation of the decisions of gatekeepers in foreign markets. For example, Bradley Bell, the executive producer and head writer of *The Bold and the Beautiful* (CBS), the most popular U.S. soap opera in the world, explains, "I am definitely aware of our international audience when I develop story lines . . . I stay clear of long, drawn-out trials because I think that international viewers may get bored with endless details of how the American legal system works. . . . Romance—the focus of our show—is the international language" (quoted in Museum of Television and Radio 1997:161).¹⁵ Below, we show some of the ways that export constraints are taken into consideration by producers, sellers, and buyers.

Demand for particular genres like action-adventure or telenovelas, for certain forms such as feature-length films, or for programming of a given quality may motivate a purchase, but the ways in which a given series will actually be used by the purchasing country varies.¹⁶ In the previous section, we discussed how the placement of a series on a network's schedule reflects the targeted foreign audience regardless of the domestic audience for which the series was originally intended. But adaptations can go far beyond that. For example, telenovelas are an extremely popular form of programming around the globe (see Barker 1997; Lopez 1995; Matelski 1999; O'Donnell 1999). Countries as diverse as China and Turkey are frequent buyers because they find the stories compelling; other countries purchase telenovelas because of the popularity of actors cast in various roles.¹⁷ A director of international sales from Carolco (a major Colombian producer of telenovelas) who attended NATPE informed us that Colombian firms typically produce series of 100 to 120 episodes.¹⁸ However, importing countries, including China, may purchase only 90 or 100 episodes. Economics explains some of those decisions: in many developing nations, with hours of television programming to fill but relatively small budgets to acquire all genres, it is difficult to afford long-running serials. In the case of China, state politics was perhaps the most important factor shaping decisions about imported programming. Until very recently, Chinese television stations were prevented from purchasing programs with more than 40 episodes; this government mandate kept both U.S. and Latin American serials off Chinese television for many years (Hornik 1996).¹⁹

In the United States, there is widespread concern among some groups about explicit depictions of sex and violence (Montgomery 1989), and we expected to hear similar commentary readily voiced by those who buy and sell programming for the international marketplace. In fact, few addressed the topic in conversation unless we introduced it, although once we did, representatives from other countries almost without exception indicated that they found such aspects problematic, regardless of where programming originated. For example, the Lithuanian buyer we spoke with identified German programming as the most problematically explicit, and American program-

ing increasingly so, but imports from both countries were manageable. In her country, all programs with sex or violence are scheduled to be broadcast after 11 P.M.

China manages the matter of violence differently. The representative of the government organization that handles imports of foreign programming told us at NATPE that action adventure imports from Hong Kong are problematic for buyers from China because of frequency, not kind. Violence cannot exceed a certain number of occurrences within a given interval, and it "has to be justifiable." As the government representative explained, there are two levels of censorship, one prior to or at the time of purchase, and one after acquisition, which can prevent the purchase from airing. If the series is rejected at that point, the supplier is obligated to supply another series in its place. How this is enforced is unclear, but it was represented to us as "a way around" problematic situations. The impact of China's policies on those who export programming to that country is illustrated by the following, which appeared in a *Wall Street Journal* article about Encore International, Inc., the China division of the International Channel cable network:

To avoid alarming Chinese authorities, Encore's executives screen 1,200 hours of programming a year to select 500 hours they think CCTV [China Central Television] will find acceptable. In the U.S., a broadcaster might buy a TV series after seeing one or two episodes; Encore screens every hour of every show, wary of a single episode on a homosexual affair or child molestation that would sink the whole series. (Chang 2000:B-4)

These examples illustrate that for exchanges to work, many different types of accommodations are made in response to the cultural context of the importing country.

Foreign buyers new to the international marketplace sometimes find their assumptions about quality and popularity challenged. A producer in the satellite broadcast operation of the Korean Broadcasting System who was visiting the United States to learn more about American programming explained to us that as a legacy of her country's traditional practice of airing only acclaimed foreign documentaries and films from sources such as the BBC, PBS, or NHK, it was presumed that the increased presence of imported entertainment programming for Korea's two commercial networks could be of a similarly high (i.e., "educational") quality. Consequently, series sought for importation were expected to impart culture and knowledge, and those, she explained, are identified and defined as ones that have achieved "high ratings" in a prime-time schedule. On this first visit to the United States she found to her surprise that many of the series that did well in that market were unacceptable by Korean standards because of their preoccupation with money or their questionable taste. To her, shows such as *Jerry Springer* (produced and distributed by Universal Television Group/USA Networks, Inc.) and *Change of Heart* (Telepictures Production/Warner Brothers Domestic Television Distribution) are "improper for a Korean audience." Learning of these series' success in the global marketplace, she was confronted with the reality that concepts such as popularity, taste, and value, which in her view coincided in Korean culture, might not do so elsewhere.

In sum, buyers and sellers adapt in numerous ways to regional and local needs and expectations, often based upon informal understandings and arrangements that are the outcome of cultural practices. In a final example, we examine some of the ways in which constraints can arise in the context of joint production ventures between countries. This kind of co-production was devised as a business strategy to manage complications from cultural prescriptions or policy regulations. For example, co-production intended for the European market may be produced in France by a division of a larger international corporation in order to meet French programming quotas (Carveth 1992).

As an illustration, consider the 1998 NATPE seminar titled "On Your Marks in Germany!" in which selected U.S. production company representatives interested in developing co-productions with that country pitched concepts for hypothetical series to German media executives and critics. The seminar was designed to show industry participants how to approach opportunities for joint ventures. The title of a hypothetical action-adventure series was *G-5*, produced by Michael Mann from *Miami Vice* with Luke Perry as an "attached star." A key feature of the series would be the high-tech G-5, described as "the most sophisticated and elaborate aircraft available today." The story setup is organized around two former successful "top gun" pilots who are best friends and who relied upon unorthodox methods while in the military. With the fall of the Soviet Union, each left the service and went to work for himself. During the course of an attempt to steal jewels previously stolen by the Soviet Union, they encounter a U.S. agent who presses them into service for the U.S. government in exchange for their freedom and who keeps them from being sent to prison for their deed. "There will be considerable humor, but the jeopardy is real," and because of the humor and appeal to a younger audience, it is not a "10 o'clock" show (i.e. intended for adult audiences and dealing with mature themes). One lead role is open, as is the part of the government agent. A flight attendant part is also uncast, and the U.S. producer is considering a popular German actress for the part.

Reactions from the German critics emphasized a variety of local factors that needed to be considered in developing the series for broadcast in their country. Only one executive gave it a favorable reaction. He noted that the mix of action and humor was similar to several currently successful shows in Germany, and commented that there is a big demand for "high-class" productions in Germany, such as one like this. He noted, however, that it would need popular German actors cast in all the unfilled parts.

Of the critics who were less interested, one found the plot too complicated, and said that German audiences "don't want to see the Secret Police again because we've already had all that stuff." This German executive also emphasized that securing financing for an expensive production such as this would be a major stumbling block. Following up on that comment, another German critic noted that competition is already very strong in prime time and that imported and co-produced series are not doing well. He added that this kind of action series is expensive to produce if it is to be done well and that, given its similarity to existing series, it would be unlikely to attract a German investor. Finally, one representative from a German network announced that his company would take a show with a concept and features as proposed, but *never* one that deals with any foreign characters. Noting a trend that has evolved over the past two years, he observed that every German broadcaster with assets prefers to pro-

duce series by himself. While acknowledging that local productions should "look American" in quality, he emphasized that the content must be entirely German—locations, actors, and story settings.

Traditionally, the media industry has relied upon a "concentration" strategy for the production and export of media content. Under this approach, all production activities take place within the domestic environment, and the products are exported to other countries. This model prevailed at the time of the 1974 UNESCO report. However, changes since the 1970s in the structure and function of international media institutions required countries to adopt a "dispersing" strategy (Porter 1990), in which production and distribution are spread across participating countries in order to take advantage of resources unique to each of the locations of participating partners. Its intent as a business strategy is to standardize marketing. From Hollywood's vantage point, "such a strategy would allow the United States to overcome host country language, cultural, and institutional barriers by tailoring media product to suit local needs" (Carveth 1992:718). As we saw illustrated above, this would appear to be far easier said than done.

From what we observed at the NATPE seminar, it appears that macro-organizational adaptations such as co-productions must still accommodate middle-range factors if they are to succeed. Whether cultural considerations are anticipated at the time of development or at the time of sale seems to make little difference. Speaking more generally about attempts to standardize global marketing strategy, Akaah (1991) found that consumer characteristics and behavior, the nature of corporate ownership, and the orientation of the corporation all present challenges to the success of such strategies. Although a manager at Paramount told us that as of early 2000, co-productions in foreign countries are accounting for an increasing proportion of international sales, given what we observed at the NATPE seminar, producers still must adapt to local or regional conditions; otherwise they may not be able to get beyond a pitch in efforts to sell to a country with an established locally based industry.²⁰

Interestingly, a concept that seems to have achieved considerable success is the newer form of international export known as foreign licensing, which entails the selling of a domestic program concept, such as game shows or "magazine" series. As an international program, the licensed version contains domestic segments but with the buying country's "frame" wrapped around them. Programs like this sell internationally, according to the manager at Paramount, in his view because there is always a demand for United States television programming. Similarly, an international version of MTV sells well abroad, but in this instance a "frame" is created by the United States that allows for "inserts" of the buying country's local artists (but see Banks 1996). While these are considered exports, in content they accede to local interests.²¹

Conclusion: Observations about the Culture World of International Television

Our examination of the international market for television considers how the business and regulatory environment in the early years of the domestic U.S. industry created

incentives for program suppliers to seek new sources of revenue in domestic syndication and foreign markets. Pursuit of those alternatives to domestic network markets set events into motion that launched an international industry and, subsequently, a significant scholarly and policy debate. Our analysis takes a "middle-range" approach (Cunningham and Jacka 1994) by using Diana Crane's concept of a culture world to explore the cultural frames that organize the business decisions of buyers and sellers in the international market. In this final section of our chapter we address implications of our analysis for sociological work on the culture of marketplaces and for the cultural imperialism debate.

Examining the international industry of television as a culture world enables us to go beyond strictly business considerations such as risk, transaction costs, and profit, and instead focus upon the forms of cooperation and patterns of collective activity that create television as a cultural product and render it available and accessible to audiences worldwide. To economists, a television series is merely "an asset consisting of a bundle of broadcast rights" (Owen and Wildman 1992:181), but it is clearly much more than that, given the debates that surround the medium. Television is a product that embodies cultural substance reflecting interests and values. It originates in the creative process of writers, and it is evaluated by critics and audiences who apply aesthetic criteria that ultimately determine the fate of individual series. Although those in the business are motivated by profit, a central feature of this culture world is the ways collaboration among individuals with disparate understandings about the cultural product shape its production, distribution, and reception globally.

Our examination of the "production" side of the culture world of international television does not support the contention that the exporting of domestic series from the United States (or other countries, for that matter) to foreign markets readily finds an audience and "naturally" propagates dominant cultural themes and values. If anything, the uncertainty over what does and doesn't work, and what is and is not accepted by audiences in domestic markets (see Bielby and Bielby 1994; DiMaggio 1977), is magnified when attempting to sell a U.S. production to a foreign audience. Our examination of this industry suggests that similar circumstances prevail as well in other exporting countries. Moreover, our work takes current understanding about market uncertainty a step further and reveals how efforts at managing that uncertainty transform the product itself, how it is exported, and how it is received. In a study of the U.S. industry almost 15 years ago, Cantor and Cantor (1986) concluded:

[we could not] support the thesis that the network of domestic production and syndication ending with overseas distribution is tightly controlled and manipulated by the government, nor for that matter by anyone or any one group. Rather we found a marketing environment that charitably could only be described as chaotic, unruly, and unpredictable, with no one really in charge and no one knowing, for example, why certain programs sell one year and do not move off the shelves the next. (p. 514)

Since then, the international market has become even more diverse and unpredictable. Always underlying any collaborative effort among those in the television

industry is a major source of uncertainty—a series' popularity with the audience. However, our study puts us one step closer to understanding the implications of that kind of uncertainty for the cultural content of what gets exported.

Though new institutional arrangements such as co-productions and licensed concepts have proliferated since the Cantors' study, those formats are not always viable. In addition, as nations successfully develop their own industries, preferences for local productions take hold, complicating the export market even further. More than two decades ago, Pool (1977) asserted that audiences would prefer their own domestic productions over imported fare to the extent that a country has an economic base to afford it (see also Straubhaar 1991). That claim, made in the midst of the raging debates over cultural imperialism, proved prescient. In the meantime, analysts who try to make sense of the global marketplace of television have a formidable task ahead of them because of the wide variation in types of programs that are exported, the systems of broadcast in the purchasing countries, cultural differences across those countries, and national policies regulating imports.

In our future research, we need to explore in greater detail how participants in the international marketplace organize their understandings of the business and cultural contexts in which they operate. For example, to what extent are established genre categories useful tools for labeling types of series that are successful in some regions but not others? Are specific genres important in opening new international markets, and are they supplanted by other kinds of programming as the market matures? What local cultural considerations, if any, are made in tailoring packages of exported products to specific countries or regions? How does critical feedback from the international market, including audiences, influence concepts for new series and those already in production? Who do organizational decision makers rely upon for creative and aesthetic judgments about the global market? What control, if any, do exporters have over audience use of products abroad? In sum, as we seek to understand the social construction of the business of exported media, we need to clarify how the properties of the cultural products themselves shape and are influenced by the global market.

Notes

1. For example, in 1998, Disney, which owns ABC, generated \$5.8 billion, or 17% of the company's overall revenues, through its international business (McClellan 1999). In contrast, in 1957, foreign distribution for the entire U.S. industry grossed a mere estimated \$14 million (Seagrave 1998: 36).

2. Becker (1982) defines art worlds as cooperative action among specialized personnel oriented toward the production of a cultural form. According to Crane (1992: 5, 112), study of popular culture and the arts is best approached through a synthetic model that integrates the study of class culture, media culture, and production of culture. Her model of a "culture world" is comprised of five components: (1) culture creators and their support personnel; (2) conventions or shared understanding about what cultural products should be like; (3) gatekeepers who evaluate cultural products; (4) organizations within which or around which cultural activities take place; and (5) audiences whose taste preferences affect the availability of cultural products.

3. Those from other countries with whom we spoke held titles such as "deputy manager, sales"; "coordinator, acquisitions"; and "head of foreign relations/acquisition." Each had major responsibility for acquiring programs for a network in their country of origin.

4. The first international exchange of television programs took place between the United Kingdom and France in 1950 (Nordenstreng and Varis 1974).

5. Statistics refer to the number of hours of airtime filled in the destination markets. That is, if 20 episodes of a one-hour series are sold in 100 markets, that series accounts for 2,000 hours.

6. A variety of factors prevent developing nations from producing their own programs, thus rendering them dependent on imports. Those factors include "low income resources, lack of industrial infrastructure, lack of support by weak governments, inappropriate models for production, and lack of trained personnel" (Straubhaar 1991: 45; see also Hoskins and Mirus 1988).

7. According to leading proponent Herbert Schiller, the primary assumptions of the original 1960s version of the cultural imperialist theory were: first, that media/cultural imperialism was but one subset of a larger system of imperialism; second, that "what is regarded as cultural output also is ideological and profit-serving to the system at large"; and third, that in the late 20TH century, the corporate economy is increasingly dependent on the media/cultural sector (1991: 14). Schiller argued that the cultural domination that exists today, while still heavily focused on the U.S., "is better understood as transnational corporate cultural domination" (p. 15).

8. See, for example, research on the economic model of television program flows (Hoskins and Mirus 1988; Wildman and Siwek 1988) which builds upon the work of Pool (1977), and the importance of "cultural proximity" (Straubhaar 1991) in explaining patterns of regional program trade.

9. We discuss the 1974 UNESCO report at some length because, though now more than 25 years old, it quickly became a primary source in subsequent scholarly, policy, and cultural critiques of the preeminent presence of American programming abroad. We also believe that many of its key findings have been overlooked by scholars.

10. In a study published two years later, William Read (1976) revealed that two-thirds of the foreign sales of American programs at that time went to countries with the most receivers and the largest audiences, in particular Canada, Australia, Japan, and the United Kingdom. Read's study reconfirmed that the principal direction of programming flow was from the U.S. to the other seven countries. Although it is uncertain whether all countries had an equal opportunity of being included in Read's study, given that its focus was on information from dominant countries, it was, nevertheless, revealing of the regional domination of countries with strong export programs.

11. This strategy is followed even among newly emerging commercial networks. When asked specifically about soap operas, the head of programming acquisition at a Lithuanian network whom we interviewed at the 1998 NATPE convention explained how her network was broadcasting some popular imported soap operas during daytime and others in the evening, depending on the intended audiences.

12. Deputy manager, sales, from the China International TV Corporation, Beijing, China.

13. Antola and Rogers also found that series were not sold to other countries until Mexico purchased the rights.

14. That imported entertainment programming prevailed in so many countries only heightened concern for its effects upon local culture (see, for example, Schuller 1979). The UNESCO report itself notes, however, that "in the selection of most entertainment programs, ideological considerations do not play much of a role, but many countries exercise greater selectivity in purchasing information-type programs" (Varis 1974: 107). Further, since release of the UNESCO report, considerable scholarship on the extent to which audiences are active, critical readers of television-as-text has demonstrated that the mere presence of a particular cultural good does not automatically have profound cultural or ideological effects on local audiences. In their meta-analysis of the effects of imported programming on television audiences, Michael Elasmir and John Hunter (1997) conclude that, "At most, foreign TV exposure may have a very weak impact upon audience members" (64; see also Ware and Dupagne 1995; Yapple and Korzenny 1989).

15. Indeed, Pierre Juneau (1993) argues that "the overall success of the American audiovisual industry rests on its ability to produce a type of entertainment that appeals to large, anonymous, undifferentiated audiences and that is unencumbered by forms of cultural content that might be an obstacle to portability" (p. 19).

16. Telenovelas are the Latin form of the U.S. daytime serial (soap operas). Each consists of a long-running serial narrative that can be traced back to prior melodramatic forms, that both originated in and were sponsored by U.S.-based companies producing domestic products (Lopez 1995). However, whereas soap operas are open-ended and potentially limitless, telenovelas have a specific number of episodes, achieving narrative closure through definite endings (see Barker 197).

17. Unlike U.S. soap operas, telenovelas typically organize their advertising campaigns around popular actors cast in lead roles (see Harrington and Bielby 1995; Lopez 1995).

18. Most Latin American telenovelas are 100-150 episodes long, in contrast to the "endless middle" characteristic of U.S. soap operas (see Allen 1985; Lopez 1995).

19. While the mandate has been lifted, a representative to NATPE from China International TV Corporation informed us that Chinese buyers today prefer telenovelas over U.S. soap operas. In their view, American soaps "don't work" because "they focus too much on the individual, and not the 'dynasty'" (i.e., family; see also Hornik 1996). For that very reason, the former prime-time American series *Dynasty* has been very popular in China.

20. Co-productions were launched in the 1980s as a viable approach to foreign markets. Although they have been characterized by one observer as a "low-volume, mid-budget business" (Grantham 1999), they continue to proliferate because they are an effective means of responding to rising production costs and the complicated constraints involved in exporting a solely U.S.-owned and produced product to foreign markets. Precise statistics on the prevalence of co-productions are not available. However, their increasing popularity is evidenced by the attention devoted to them by industry seminars and international law firms that specialize in organizing such deals. Coverage of new co-production deals has become a regular feature of industry trade publications (see, for example, Leventhal 1997; Williams 1997; Edmunds 1996).

21. An interesting failure in the export of existing program concepts was observed when Telemundo attempted to revamp its prime-time programming in order to attract a younger, more Americanized Latino audience. One of its failed series was an adaptation of *Charlie's Angels*, that had a hip young Latino cast but relied upon old scripts for its plots. Though the audience's rejection was in part a reaction to the dropping of Telemundo's highly popular prime-time mainstay, telenovelas, from its evening fare, another reason for the failure was

that the series' concept proved to be of little interest to the targeted audience. One high-level industry source from a rival network who is familiar with the Latino market also suggested to us that the overly sexualized female characters were seen as offensive by some sub-populations of the Latino audience. The reasons for the failure of this series underscore the subtle ways in which cultural constraints operate, even for those within the cultural system (see, for example, Faber, O'Guinn, and Meyer 1986).

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Globalization of Cultural Production

The Transformation of Children's Animated Television, 1980 to 1995

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Many of the discussions about the nature of globalization, such as the extent of cultural homogenization or heterogeneity that results from globalization (Featherstone 1990; McChesney 1999) and the nature of the process itself as a form of cultural imperialism or as a syncretization of local and global processes (Robertson 1992), are very general and only superficially informed by knowledge and understanding of the actual activities, relationships, and processes involved in economic and cultural transactions between global actors in specific culture industries and institutions. Theorists writing about the globalization of culture have called for a substantive focus on the practical instances of globalization, through which processes of cultural integration and differentiation operate (Featherstone 1990). Notably, Roland Robertson (1992) argues that globalization is best understood through a mapping of actual intersocietal and intercultural encounters and that these should deal with the "processes of cultural syncretization—more specifically . . . the ways in which problems of particularism and universalism have been addressed" (p. 41).

The case of children's animated television provides an opportunity to examine both economic and cultural factors that led to an intensification of cross-national collaboration in this form of television production as well as the strategies that resulted in innovations in programming that were compatible with consumer tastes in countries that were culturally very diverse. The complexity of the global networks in this industry, which includes both large and small companies from large and small countries, means that these networks cannot be characterized in terms of a simple center-periphery model. Analysis of these materials also shows that elements of homogenization and heterogeneity may exist in the same segment of the industry.

Though much research on cultural production tends toward reductionism or overdetermination, prioritizing, for example, industrial, regulatory, or content features, the current model I will discuss assumes that cultural production is best understood