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Evolution of Television Formats
doctoral thesis

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Without a doubt, the media is facing a paradigm shift. The one-hundred-year-old culture of communication and advertising has changed in recent years. The rules, valid up till now, have lost their value. It is far more difficult to reach receptive viewers. Advertisement avoidance is rampant, and audience suggestibility has declined. Messages conveyed by media, marketing and visual communication combined do not have the effect or impact of communication between individuals and *word of mouth*.¹ According to joint research conducted by Ogilvy, an ad agency, Google and TNS, presented at the International Festival of Creativity at Cannes in July 2014, 74% of consumers claim that on-line word of mouth significantly influences their purchase decisions.² Brightlocal, a company that researches on-line habits, reckons that 88% of users trust the opinions published on-line just as much as if they heard it from a close friend.³ On-line word of mouth has more effect now than any other form of advertising, and the technology exists to spread this “word of mouth effect” extensively. Nowadays, social media and Web 2.0 sites constitute the medium where the effect of word of mouth-based communication is multiplied.

The revolution taking place in the area of digital content is having an appreciable effect on both the manner and the amount of TV consumption.⁴ The question is in what ways these changes will reorder the workings of the television market. The dilemmas in connection with this question are endless. Indeed, as a result of technological developments, the new media environment and its products have huge social and cultural significance. The question clearly affects several branches of industry from the advertising market to technological improvements and content manufacturing.

In 1946, legendary Hollywood producer Darryl F. Zanuck gave television six months, saying, “People will soon get tired of staring at a plywood box every night.”⁵ Unlike Zanuck, McLuhan characterised the appearance of television as a milestone in the history of media, comparable to the invention of writing or the advent of mass printing.⁶ Barwise and Ehrenberg see the

¹ Idil M. Cakim: *Implementing Word of Mouth Marketing*. John Wiley & Sons, 2009. 6.

² Cenk Bulbul – Netta Gross – Steven Shin – Jeremy Katz: *When The Path To Purchase Becomes The Path To Purpose*. 2014. 06. (http://think.storage.googleapis.com/docs/the-path-to-purpose_articles.pdf)

³ brightlocal.com: *Local Consumer Review Survey 2014*. (<https://www.brightlocal.com/learn/local-consumer-review-survey-2014/>)

⁴ ericsson.com: *New media habits for TV user groups*.

(<https://www.ericsson.com/en/trends-and-insights/consumerlab/consumer-insights/reports/tv-and-media-2016#newmediahabitsfortvusergroups>)

⁵ Rudy Behlmer: *Memo from Darryl F. Zanuck: The Golden Years at Twentieth Century Fox*. Grove Press, 1995. 25.

⁶ McLuhan, M.: *The Gutenberg galaxy: The making of typographic man*. Routledge & Kegan Paul. 1962. 102.

significance of television in terms of the amount of time people devote to watching it.⁷ With the rise in the number of platforms suitable for consuming motion picture content, and thanks to the technological changes of the past era, *television* as a concept has undergone fundamental changes in meaning. Its dominance as a tool of mass entertainment has diminished in importance. Meanwhile, a significant portion of the programs shown on new platforms is built upon the structure of television format. In other words, they are further phases in its evolution. These evolutionary trends are the focus of my research – that is, how television’s licensed programs (or formats) reform to suit the changing demands of digital content providers, creators and consumers, as well as what new genres form the basis of this service. The study highlights a few of the countless two-sided attempts to interweave television and the internet – for instance, when a television program simultaneously appears on monitors and digital platforms or vice versa. Among these experiments, I deal with one case study in detail, focusing on a television licensed program where I participated in the development.

The topic can be examined from numerous other relevant aspects. For example, who puts forward the most successful content? With what tools and on what platforms is it possible to view it? How is content production restructured, and which genre finds the link between the digital world and the traditional television program? In order to assess the impact of these changes, the fundamental concepts must first be established. What alteration in meaning has the concept of *television* undergone? What does it mean if content is *digital*? How and why was the television market (and its formats) transformed?

In 2016, an article appeared in *Motley Fool*, an American economic periodical, with a title that caused quite a stir and sparked debate. The title was “It’s Official! The TV Industry Is Dying.”⁸ The article directly cited data from the U S Nielsen’s Total Audience Report,⁹ according to which the young (18-24 age group) watch increasingly less television, and this drop in numbers was more pronounced than in any previous period. When analysing the data, it is important to note that the figures only refer to the traditional, linear habits of television viewing. Time spent on time-shifted viewing (that is, recorded by means of some technology only to be watched later) steadily grew. The majority of formats used by the Y generation (or Millennials, as this age group is referred to in Anglo-Saxon countries) for information and entertainment are

⁷ Patrick Barwise – Andrew Ehrenberg: *Television and its audience*. London: SAGE publications. 1994. 60.

⁸ Andrés Cardenal: *It's Official: The TV Industry Is Dying*. 2016. 08. 13.

(<https://www.fool.com/investing/2016/08/13/its-official-the-tv-industry-is-dying.aspx>)

⁹ nielsen.com: *The Nielsen Total Audience Report: Q2 2017*. 2017.11.16.

(<http://www.nielsen.com/us/en/insights/reports/2017/the-nielsen-total-audience-report-q1-2017.html>)

primarily found on digital platforms. What is clear from the research data is that the young – who, in a few years, will become the most powerful consumer and market force – consume increasingly less TV content.

These figures have begun to reform the workings of the advertising market. The traditionally expected 30-second television spots (TV ads or commercials) are becoming less and less effective. That is why large brands and advertisers are trying to appear on certain platforms and with certain content that is sure to reach their target group. One such brand was Adidas, whose CEO announced in 2017 that the majority of their marketing budget would be spent on digital platforms and not on TV.¹⁰ Several findings substantiate this sentiment. One of the most quoted studies, produced by the American group Forrester Research, found that 60% of those asked watch pre-recorded programs. That way, they are able to skip over 92% of the advertising. Meanwhile, 30% do not watch commercials at all.^{11 12}

Part of my research methodology was based on a review of current research into the television industry and its practices. I work as a sales executive at a content production and development company that responds to such changes. The company operates content production bases of various sizes in ten Eastern European countries (the Czech Republic, Slovakia, Hungary, Romania, Bulgaria, Serbia, Slovenia, Estonia, Latvia and Lithuania). In these countries, I maintain contact with television station decision-makers and leaders of local companies. Together, we analyse market movements, changes in the market players, content consumption history, demographic processes and consumption, as well as every change and trend in society, technology and public life that would tend to so affect content consumption. On the basis of briefs (the guidelines of a given order) received from television stations, I assemble packages of television formats that are likely to appeal to them.

Mere television viewing is not enough to determine what sorts of programming the world's largest companies are considering for development. These innovations can be recognised on the professional markets, where one may access not only the newest developments, but industrial data, spending figures and detailed research into viewers' habits.

¹⁰ nielsen.com: *The Nielsen Total Audience Report: Q2 2017*. 2017.11.16.

(<http://www.nielsen.com/us/en/insights/reports/2017/the-nielsen-total-audience-report-q1-2017.html>)

¹¹ Kristin Blondé – Irene Roozen: *An Explorative Study of Testing the Effectiveness of Product Placement Compared to 30-Second Commercials*. 2007, 4. (http://www.escp-eap.eu/conferences/marketing/2007_cp/Materiali/Paper/Fr/Blonde_Roozen.pdf)

¹² Bátorfy Attila: *Az online reklámköltés megelőzte a tévét*. 2016.03.02.

(<https://vs.hu/gazdasag/osszes/az-online-reklamkoltes-megelőzte-a-tevet-0302>)

In the interests of survival, content developers must respond to the changes and adapt their working methods accordingly. From my own professional perspective, one such reaction is the imperative, already in the course of developing a program, to work in close connection with the large brands, advertisers and social media (equipped with exact data and the deepest knowledge of consumer habits), in order to make the ads an integral part of the programs, so they become unavoidable. A different reaction is to develop the selection of television formats to include multi-platform or cross-platform content.¹³ This is no longer an oddity; instead, it features on professional markets as an indispensable component of success.

Thus, overall, the study aims to support the statement that entertaining, non-fiction television formats are not dying; rather, they live on within digital media, where they are laying the foundations for a new type of content consumption and manufacture.

The starting point of my research and its theme was professional in nature. In the 15 years that I have spent on the television format market, I have observed processes both theoretical and practical, and I consider it worthwhile to examine thoroughly their background and essence. The main theses of my work are as follows. Digital and technological developments and the democratisation of content production have initiated a process reshaping television and television content. This change, however, is not revolutionary; it can be seen as television's natural evolution.¹⁴ (1) In spite of the fact that there are not uniform laws concerning the protection of formats, large on-line content providers have already begun to use the format industry's well-established principles of operation, its Bible, by buying licenses from the largest format distribution companies. (2) These companies (cited in the study as well) have adapted to changing market demands, adjusting or reforming their existing content accordingly. The changes, especially those due to technological developments, have also reshaped the attitudes of the viewers and audience, so new methods are needed to serve them. (3) One of the most important of these methods is interactivity and its realisation by the most creative means possible. It is no longer adaptability, but uniqueness, a personal tone and the resulting credibility, that is of growing commercial value. Thanks to platforms that provide digital content, distinct and creative varieties have been created that are derived from television genres; yet, they are independent of them, affording young target groups with an innovative forum for experiences, knowledge and identity formation. All this results in ever greater

¹³ That is, programs which appear simultaneously on multiple surfaces (such as television and mobile) with different content elements. For example, if someone downloads a program's application, then they can receive background information about the performers which is not available on television.

¹⁴ Jenei Ágnes: *A televízió fejlődése: az interaktív digitális tévé*. Budapest, 2007. 5.

competition for television channels. (4) Additionally, new types of open forums have been created, which may expand the concept of *participatory content consumption and manufacture*. It is increasingly difficult to distinguish between personal and mass content. Denis McQuail feels that the convergence of diverse media means that we now only need a computer, since that includes everything.¹⁵ In light of the research results, it appears that *convergence* actually is a key concept in the developmental history of television formats. During the changes, new digital genres and convergent content, which combines the characteristics of television and internet¹⁶ have appeared.

One might think that the large television stations have enjoyed a certain advantage in the course of the market's transformation, insofar as the digital branches of their companies have a stable financial background, as opposed to players just starting out. At the same time, the situation is no so simple, since embarking on the digital market is not necessarily a financial matter. With regard to the traditional content-producing structure, in the time it takes for television to prepare a YouTube video, a YouTuber could produce a vast number of such clips at home alone in the kitchen. Also, while traditional television may produce content for YouTube with professional equipment and outstanding quality, it will never be as personal or, at the same time, credible as the content created by an individual YouTuber. The qualities *personal* and *credible* have become of key importance, some of the most important ingredients for success and marketability. Research¹⁷ has shown that viewers are far more open to products and services which they saw in video recommendations, as opposed to a traditional TV spot. It is no accident that we call them *influencers* or *opinion leaders*. For brands, this points in a clear direction, but the path is not so straightforward. The true challenge for them is that, in order for their ads to pay off, they must work together with young players who have become stars in the digital universe. In practice, this means they must entrust everything to a YouTuber who, after all, has the best understanding of the medium's audience and content.¹⁸

Professional knowledge, background and experience acquired in the course of traditional television program production is no longer enough to be successful in the digital world as well. It is by no means certain that experts who have produced TV programs up till now will be able

¹⁵ Denis McQuail: *McQuail's Mass Communication Theory*. Sage Publications, 2010, 70.

¹⁶ Jenei op. cit. 77.

¹⁷ Susanne Ault: Survey: *YouTube Stars More Popular Than Mainstream Celebs Among U.S. Teens*. 2014.08.05. (<http://variety.com/2014/digital/news/survey-youtube-stars-more-popular-than-mainstream-celebs-among-u-s-teens-1201275245/>)

¹⁸ Kreatív Online: *Odaadnák a hajukat egy youtuber kedvéért*. 2017.04.06. (http://kreativ.hu/cikk/odaadnak_a_hajukat_egy_youtuber_kedveert)

to create a successful Facebook video. A two-way transfer can be observed between social media and television formats. Video sharing sites represent a new platform (or, at least, a new base) for traditional TV formats. For the time being, the whole market is experimenting. Low barriers to market entry and low production costs have created an opportunity for previously unimaginable *experimentation in formal language*. Thus, preparing digital content has become a tool of self-expression. There is still no recipe for what will make a Facebook or YouTube video popular, despite the fact that we may draw ever more conclusions on the basis of results so far. Zanuck's pessimistic prediction about the likely demise of television has yet to come true. Television formats are present in an increasing variety of forms on every, previously unimaginable, technological platform. In other words, we are experiencing television's ever more apparent metamorphosis, multiplication and proliferation.¹⁹

¹⁹ Jenei op. cit. 1.