

## Chapter 6

# Multichannel strategy, universalism, and the challenge of audience fragmentation

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### Abstract

Technology and the political climate made it possible for the Danish public service media institution, the Danish Broadcasting Corporation (DR), to expand its television channel portfolio from two to six channels between 2006 and 2009. For a decade, DR has been operating one primary television channel and five others with relatively narrow profiles. This chapter considers whether DR might be undermining its own legitimacy as a provider of a universal service by pursuing this multichannel strategy. Although the entire population can access all of DR's content, the multichannel strategy positions DR as part of a development that is fragmenting the public into discrete taste groups. Through a qualitative study of DR's scheduling strategies, the chapter investigates the extent to which DR seeks to unite its channel portfolio, thus avoiding running six separate channels. In the conclusion, political development of media in Denmark elucidates the changing conditions of DR's activities.

**Keywords:** legacy mass media, personalisation, curation, linear and non-linear television, content diversity, Nordic media

## Introduction

If a Danish television viewer wanted to change channels in the beginning of the 1990s, there were few domestic options. Danish viewers could choose between three national television channels: the Danish Broadcasting Corporation (DR), TV 2, and TV3. Today, the Danish television market features about 45 television channels that are enabled by technological, political, economic, and user-behaviour developments. For viewers, the large number of television channels means more choice. For television companies, those developments mean increased competition and – following this – a need to develop marketing and scheduling strategies to both capture and retain the attention of viewers. DR has felt the increased competition, but for public service media organisations,

this development raises a question of balance. On the one hand, they must take care of the special tasks that are their *raison d'être* by providing the public with a diverse programme offer, catering for minorities, and strengthening the national culture and language of Denmark. On the other hand, they must ensure that viewers, listeners, and users actually make use of their offers. Otherwise, public organisations lose relevance and legitimacy.

This chapter focuses on DR, the Danish public service media institution (previously named Denmark's Radio), to consider how it has developed its television operations between 2005 and 2015. During this period, DR transitioned from operating two television channels with mixed profiles for general audiences to six channels, one primary and five with distinctive and rather narrow profiles. The extended channel portfolio gives viewers more programmes and channel options to choose between. Distinctive profiles have enabled DR to retain a high reach and share, including young audience groups who are typically leaving linear television. The development also means strategic and scheduling tasks have changed radically in a relatively short period.

Everybody in Denmark can access DR's television channels and online streaming service. These channels are free-to-air and the streaming service does not require an account. From this perspective, DR's television service is a universal service. However, with six profiled television channels, DR contributes to the general trend in media development to cater to individual preferences. The previous "mass audience" is fragmented into a series of non-integrated niche audiences. The pros and cons can be argued, but the aim here is to discuss whether by doing so DR might undermine its own legitimacy as a universal service provider as it metamorphoses into a multichannel provider. It is reasonable to question whether this development is a better way of serving viewers, and whether DR has any alternatives. To this end, the chapter sheds light on the degree to which DR is operating its television channel portfolio as a unified offer or as a series of discrete channels. This is done through analyses of the development of the intersections between channels during prime time and the *continuities* at 8:00 p.m. Continuities are here understood as the visual and auditive elements played between or in the programmes to inform viewers of (up)coming programmes or otherwise brand the television channel or company in general. The empirical material for these two analyses consists of recordings of the range of programmes on all DR's television channels, and the analyses draws methodologically on Bruun (2016), Ihlebæk and colleagues (2014), and Johnson (2013b). One week from the autumns of 2005, 2010, and 2015 were chosen for the study because these years represent key stages in DR's development as a provider of a multichannel portfolio.<sup>1</sup>

After a short introduction to DR and the Danish television landscape, the chapter continues with a discussion of the notion of a channel and how a universal and diverse television service is to be understood. In the conclusion,

the media political development in Denmark is incorporated to demonstrate a reinterpretation of DR's public service mission and tasks. The chapter deals solely with DR and the circumstances in Denmark, but aims to contribute to the broader discussion about the future role of legacy public service broadcasters in a media landscape characterised by multiple channels and platforms, which Ellis (2002) described as the era of plenty, and which Ihlebæk and colleagues (2014) refer to as the era of proliferation.

### DR's public service activities

DR is the Danish Broadcasting Corporation. It was founded in 1925 as the first broadcaster in Denmark. From the start, DR was given the status of a public service institution. In the first 25 years of its history, DR was the sole provider of radio services. From 1951, the institution broadcast television services as well, and in 1996 DR launched its first web page that was solely for news content. The year 2001 was the first time that DR provided live-broadcast television online in conjunction with the Eurovision Song Contest the company hosted that year. Today, programmes can be watched as catch-up services online, there is a streaming service and several apps that provide content and services for children and news, and so forth.

DR is an independent public institution managed by an executive board and a management board in accordance with the Danish Radio and Television Act and DR's successive public service contracts. These contracts are agreements between DR and the Minister for Culture. Until 2019, DR's public service activities were financed by an annual licence fee. Between 2019 and 2022, the licence fee will be gradually replaced by a tax, thereby making the budget of DR part of the general public financing system (The Danish Ministry of Finance, 2018).

This chapter focuses on the television activities of DR, which is not the only provider of public service television in Denmark. TV 2/Denmark also has public service obligations, and the same applies to eight regional TV 2 television stations. Of these public institutions, DR is by far the largest in size and in the number of channels and platforms. The television channels of both DR and TV 2/Denmark are popular among viewers; in total, 63 per cent of television viewing in Denmark is devoted to public service channels (The Agency for Palaces and Culture, 2019).

### The television channel in theory

“Broadcasting”, in the original sense of the word, referred to the scattering of seed corn that a sower cast in all directions. In relation to electronic media, the

term is allegorical for the universal transmission of programme content from a central sender to everyone as a mass audience. This contrasts with the concept of “channel”, which the Merriam-Webster Dictionary defines as “a path along which information (such as data or music) in the form of an electrical signal passes” (Merriam-Webster, 2002: n.p.). Whereas “broadcasting” describes the broad provision of unspecified content, “channel” characterises targeted communication where the sender directs the content to receivers. This distinction is interesting to keep in mind when describing how the television channel went from being merely a technical distribution platform to becoming a carefully profiled means for addressing a specific target group within the broad mass of potential audiences.

Drawing on Ellis (2002), Johnson describes the circumstances under which television channels began in the medium’s formative period:

In the early decades of television broadcasting the number of television channels was determined by the restriction of the electromagnetic spectrum. As a consequence, the broadcast era (roughly from the 1930s/40s to the 1980s) is often one characterized by a scarcity of television channels. (Johnson, 2013a: 276)

Due to spectrum scarcity, it was both costly and difficult to operate a broadcasting network that was mandated to reach even the most remote residents of a population. Scannell (1990) describes how it became a task for national governments to distribute the sparse number of frequencies amongst broadcasters, the armed forces, emergency services, telecommunications, and so forth. Because of restricted supply but great demand, public broadcasters in Europe had one or two channels (Mortensen, 2008; Scannell, 1990). The channel was primarily understood as a technological means for distributing content to an entire population. As cable and satellite technology made it cheaper to launch and operate television channels, more were launched, and the single channel went from being a platform of distribution to a way of addressing specific target groups – in other words, niche audiences.

One reason for this development was new financing techniques that paralleled developments in distribution technologies. While a public broadcaster financed by a universal licence fee is required to serve the entire population, and a channel financed by commercial advertisements must have a high reach in its target group to be attractive to advertisers, cable and satellite technologies gave the possibility of establishing pay-per-view and subscription services. Johnson (2012) describes how channels were profiled to help persuade viewers to pay for their content. Despite the large supply of television channels, most viewers watch between five and eight according to Johnson (2012). Therefore, it was “increasingly important not only for broadcasters to stand out in an ever more crowded marketplace, but also to try to position themselves as one of the few

regular channels for television viewing” (Johnson, 2013a: 283). One way to stand out was, according to Johnson (2013a), to launch niche channels directed at narrowly defined target groups or with uniform content – thematically or in genres. Thus, profiled channels are targeted to niche interests. However broad or narrow, niche is the opposite of universal.

Although public service broadcasters are not subject to market mechanisms in an economic sense (at least for those that are non-commercial), the intensified competition that followed the arrival of so many new television channels meant that public media institutions have needed to address viewers more directly to stand out in the competition. A general tendency emerged in European television markets during the 1990s that encouraged profiling each channel (Johnson, 2013a; Light, 2004). Among others, Light (2004) characterised the development of today’s multichannel system as a transition from broadcasting to narrowcasting (see also Goodwin, 2018; Negroponte, 1995), which is to say, from transmitting programmes intended for an entire population to transmitting programmes directed to narrow viewer segments – that is, target audiences. A broad mass audience is eroded when viewers are spread across an array of niche channels.

### Universality: From a question of access to a question of content and presence

Constituent in the development of today’s multichannel television landscape, the notion of a universal service has widened. Syvertsen (1999: 6) argued that public service broadcasting was initially understood as a public utility, and that within this understanding, “the prime criteria of success are signal quality, efficiency of operations and a distribution network that provides universal access”. Later, Syvertsen (2003) applied this understanding to the mission of European public broadcasters as an obligation to guarantee universal coverage as a service for an entire population. Thus, universality was a matter of developing a network the entire national population could access. Jakubowicz (2006) and Van den Bulck and Moe (2018) broadened the definition of universality to focus as well on content.

Given developments in television markets and the emergence of new distribution platforms in recent years, Jakubowicz (2006: 12) worried that a new understanding of universality concerned with “the use of thematic services, and even more so of personalized ones, can be seen as undercutting what has always been regarded as a distinguishing element of PSB, i.e. universality of content and access”. Van den Bulck and Moe focus solely on the content aspect in their description of universality as a dual ideal. It refers to universal appeal because “PSM must provide a range of programmes that inform, inspire, entertain and

appeal to the diverse interests of the young and the old, the higher and less educated, across the community” (Van den Bulck & Moe, 2018: 877). At the same time, universality can be interpreted as “the idea that PSM must cater to every specific taste, even outside the mainstream” (Van den Bulck & Moe, 2018: 878). This combination of programmes with mass-appeal and services tailored for specific audiences is also evident in Jakubowicz’s (2006) understanding of universality of content.

Universality is not mentioned explicitly in DR’s legal framework or public service contracts; however, a number of DR’s obligations reflect the universality ideal in both access and content. In the current public service contract, DR is obliged to ensure that the entire population has access to important and independent information, as well as cultural programming and space for debate (DR, 2018b: 2). By law, DR is also required to endeavour to provide versatility and diversity in its overall programme supply. The Danish Radio and Television Act (2014) specifies a number of genres DR must provide, including news, information, educational programmes, art, and entertainment. DR’s public service contract for 2019–2023 enlarges on *how* DR must handle its obligations within news, educational programmes, content for children and young people, Danish drama, music, art, and types of sport.

There are several reasons for DR’s obligation to provide a diverse supply of genres. First, a broad range of genres ensures the population is well-informed about topics deemed important to the society. Second, the obligation sets the public service institution apart from commercial competitors that are more specialised in their content provision. Third, a diverse supply of genres can better ensure that the content of DR is able to cater to “every” specific taste.

Everybody in Denmark can access DR’s services and content. Thus, regarding universality as a matter of access, DR is without debate providing a universal service to the public. However, the development described by Jakubowicz (2006) is characteristic of the way DR has evolved over the past decade. As DR’s multichannel portfolio offers viewers more content to choose between, the extension of channel choice entails a challenge for the public service media organisation from a universality perspective. The comprehensive channel and programme choice means there are fewer programmes viewers have in common, which means fewer shared experiences and less common knowledge. In addition, the multichannel portfolio has made a diverse reception more difficult because viewers can choose between several rather narrowly profiled channels, and therefore more easily avoid less-popular genres.

## The diverse programme output and its reception

There is a sticking point: “On its own, diversity of supply cannot secure diversity of reception, but it is a necessary condition for this”, McQuail observed (1993: 157). The viewers’ exposure to a diverse programme supply is part of the debate about the obligation of the public service institution to provide a versatile and diverse programme output. It is important to note that DR has never been required to ensure a diverse reception, nor has the Danish broadcaster been asked to have equal programme output across genres. Such demands would curtail the flexibility needed to respond to changing current events, relevant platforms, and the preferences of audiences. However, there is an implicit expectation that a diverse supply can stimulate diversity of reception, including genres typically seen as important to society in a broader perspective (e.g., news and current affairs especially).

This view was expressed by Scannell (1989: 138) when he argued for “the supply of mixed programme services [...] i.e. a wide range of different kinds of programmes delivered on a single channel”. Scannell feared a segmented British television market and the implications for the broader public:

Generic programming fragments the general public that is still constituted in today’s four national UK television channels into particular taste publics whom advertisers are increasingly keen to target. In so doing it destroys the principle of equality of access for all to entertainment, informational and cultural resources in a common public domain. (Scannell, 1989: 139)

Scannell considered universal access and appeal to have key importance for the democratisation of society. According to Scannell, the consequence of segmenting viewers across numerous niche channels could be problematic for a society as a whole since individual interest would replace a shared common interest. This prediction was made 30 years ago, but in Denmark, the viewing habits have to some extent developed as foreseen. In Denmark, a country of approximately 5.8 million inhabitants, the number of programmes with more than 1 million viewers has declined from about 1,000 in the 1990s to about 100 in 2017 (Knudsen & Svenningsen, 2018). And today, we not only have a wide range of segmented television channels to choose between – several online services foster personalised media consumption.

Because all viewers are not well-resourced, some will opt out of the more challenging programme genres they would have otherwise met on a channel with a mixed range of programmes, writes Scannell (1989). This can also be said about well-resourced viewers who do not seek out a mixed range of programmes. According to Scannell, the absence of equal access to a broad and mixed programme service erodes the democratic principles on which public service broadcasting rests.

On the one hand, Scannell is right in identifying the challenges the multiplied and individualised television market entails for the public service mandate, especially to what degree we can still talk about a universal service of benefit for society. We shall get back to this discussion seen from a Danish perspective at the end of this chapter.

On the other hand, Scannell romanticises the general public in the UK and exaggerates the abilities of public media to be community creators. A mixed programme supply on a single channel directed to an entire population does not take into account different preferences in genres and styles that cause viewers to switch off the television or – in a multichannel system – to choose other channels. Neither does he acknowledge, for instance, that when children’s programmes are being broadcast, other age groups may switch off or to another channel (see also Ytreberg, 2002). Light (2004: 249) is among those upbraiding the view Scannell expressed:

One has to ask at this stage whether such a vision of genre diversity still has any validity or whether it is just a vestige of public service broadcasting history. It rests on the assumption that proximity still works as a means to lure audiences to flow from a more popular programme to a less popular one.

According to Light (2004), flow scheduling of diverse channels might have an effect in a system with limited options, but when viewers can switch between many channels in a few clicks on the remote control, it is more likely that a viewer will change channels than stay and watch a programme that does not create immediate interest.

The contributions of Scannell and Light must be read against the background of the times in which each was written. The late 1980s was characterised by deregulation when public television monopolies were ended in many European countries and commercial competition became notable. Scannell (1989) accentuates media development in the US as concerns arose about the consequences of fragmented channels with low-cost repeats and narrow ranges of content within channels. He described how economic and political forces were pressing for a similar development in Europe. When Light wrote her dissertation in 2004, the segmented channel landscape was a reality. Although viewers now have numerous channels to choose among, that does not mean Light was right in her assumptions of viewer behaviour. According to interviews with key staff in DR’s programming department I carried out, flow scheduling still has a measurable effect (Lassen, 2018). This indicates that viewers can still be motivated to stay with a channel despite numerous alternatives.

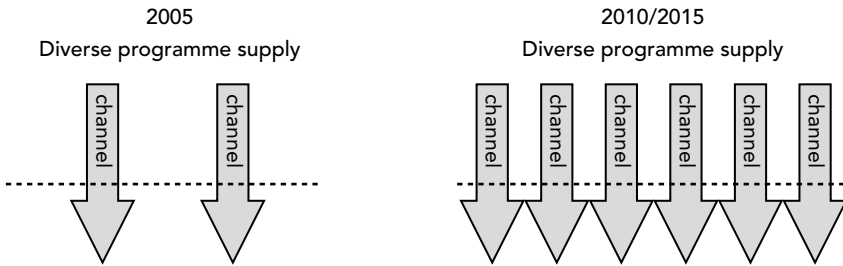
Unlike Scannell, both McQuail (1993) and Hellman (2001) argued that diversity is (also) a question of choice in the viewing options. McQuail described two forms of versatility: internal and external diversity; Hellman formulated this as vertical and horizontal diversity. The idea is much the same: a single channel



can offer a versatile and manifold range of programmes, described by Scannell as a mixed programme supply. This would be internal or vertical diversity. But diversity can also be found across channels in a portfolio or even an entire channel system. This would be external or horizontal diversity.

On this type of diversity, Hellman (2001: 185) writes, “although individual channels may have become less mixed, the audience may be better served today than they were yesterday”. DR’s channel portfolio offers an example of this kind of diversity. Figure 1 demonstrates the number of channels (and thus the number of programmes) viewers could choose from at any given time in 2005, 2010, and 2015, respectively. The DR viewer could choose between two programmes in 2005, while this number in 2010 and 2015 was six.

**Figure 1.** Horizontal viewer choice



Comments: The dotted line illustrates the viewer’s option at any given time.

To a public service media institution such as DR, the multichannel portfolio is an advantage in allowing DR to broadcast a greater number of programmes at the same time, thus making it possible to cover more genres and target groups. In this way, horizontal or external diversity is bigger within the channel portfolio of DR.

However, in reality, it is not necessarily the case that an increase in the number of channels will cause a more diverse programme output in the entire channel system. It can result in the opposite, so that there will be more of the same kinds of content. Hellman (2001: 186) writes, “it is possible that each channel aims at diversity with similar content (identical channel diversity), with none of the channels making any ‘extra’ contribution to the overall system diversity”. The reason for this is that in a segmented channel, the programme output will be narrower than on a channel with a mixed profile. At the same time, a greater number of television channels results in more intense competition for the attention of viewers. When in addition there is a smaller part of the population of interest to advertisers, and consequently for private commercial television companies, those channels tend to focus on the same target groups. In a study of the Norwegian television landscape, Ihlebæk and colleagues (2011) concluded that the public service television channels broadcast a broader variety

of programme genres and addressed a greater part of the population compared with private channels.

## DR's television channel portfolio

Since DR launched its second television channel in 1996, the strategy has been a mixed portfolio rather than mixed channels. Analyses of DR's strategies and interviews with key staff show that the design (and changes) of the profile for the entire portfolio has reflected contemporary challenges in the media landscape in general, and to DR specifically. For example, the profile of DR's television channel portfolio from 2014 to 2020 points to difficulties this company (and other legacy broadcasters) face in reaching children and young people who are leaving traditional linear channels in favour of on-demand services. DR is grappling with this development by offering three channels targeted to children and young people: DR Ramasjang for children aged 3–6, DR Ultra for children aged 7–12, and DR3 for teens and young adults aged 15–39.

An aspect of central importance in designing the overall portfolio profile is competition. Soon after DR's monopoly was broken in 1988, DR began losing viewers to the new, competing public service channel TV 2. As more channels and services have come into being, the competition has grown ever fiercer. A response to the competition is the strengthening of DR's main channel DR1. Since DR2 was launched in 1996, DR1 has been the main channel in the portfolio. But this position was strengthened in 2012 regarding which programmes the individual channels broadcast and the scheduling strategies for the portfolio.

Besides making it possible for DR to address the difficult-to-reach-target groups, the multichannel strategy lets DR offer viewers more content to choose between and cater to niche groups with narrower profiles. The strategy has worked well in light of audience ratings. The main channel, as well as the portfolio channels, have obtained high shares and reaches in viewing. In 2015, DR's television channels obtained a joint share of viewing of 34 per cent (in 2018 the number was 37%), and DR Ramasjang obtained the highest share amongst the children's channels in the Danish television market with 2 per cent (DR Media Research, 2019; Lassen, 2018).

However, legitimising the strategy of a large channel portfolio with segmented channel profiles is challenged in two areas. First, the number of channels makes it difficult for DR to fill out the schedule with original programmes. When DR launched new channels (in 1996 as well as in 2009), DR's income was not increased correspondingly. Therefore, many reruns and imported programmes were necessary. From 2005 to 2015, the share of reruns went from 51 per cent to 79 per cent on DR's television channels, while the broadcast hours of fiction from abroad rose from 2,419 hours to 13,872 hours – or from 23 per cent to

32 per cent of DR's total television programme output (Lassen, 2018).<sup>2</sup> This development gives rise to criticism, not least from Danish politicians, which will be elucidated at the end of this chapter.

The second reason the legitimisation of the channel portfolio is challenged hinges on the question of whether an assortment of niche channels actually comprises a universal service. The entire population can access all DR's channels, and the combination of one broad and several narrow channel profiles gives DR rich opportunity to cater to every taste group. But if the public is fragmented into niche audiences that do not share a common experience, then a core value of public service broadcasting is undermined. To address this challenge, the next section will shed light on the degree to which DR is uniting its television channel portfolio through its scheduling strategy.

### A united television channel portfolio?

Two aspects are highlighted in the study of whether DR is offering a united portfolio or running separate channels, and how this has developed from 2005 to 2015. Both aspects are related to the structural and strategic level of DR's television activities.

The first aspect is whether the range of programmes are coordinated so that it is easy for viewers to shift between channels without missing content. If this is *not* the case, the viewers will have to choose one channel and stay on it (or switch to a competing channel) and will not benefit from DR's different offers and channel profiles. Secondly, DR's practice of making programme promotions will be investigated. Of special interest will be whether DR does cross-promoting so viewers know what can be found on the other channels during specific viewing periods.

The data consists of printed television listings and recordings of the range of programmes for a week during the autumns of 2005, 2010, and 2015. The focus is on prime time (6:00 p.m.–midnight) – a longer period than usual because the channels in the portfolio have different prime times.

#### *Coordination of scheduling structure*

There are two main reasons why it is important to coordinate the channels' range of programmes. For the broadcasters, it increases the possibility of retaining viewers within the channel portfolio. For the viewers, it is a better service due to more options to choose between. In this chapter, "intersection" describes the coordination of programme starting times. The three tables below show the intersections between the channels comprising DR's television channel portfolio during a week in 2005, 2010, and 2015.

**Table 1.** Intersections in DR’s television channel portfolio during week 40 in 2005

	Monday	Tuesday	Wednes- day	Thursday	Friday	Saturday	Sunday
6:00 p.m.	X						
7:30 p.m.							X
8:00 p.m.	X	X	X	X	X	X	X
8:30 p.m.		X					
9:00 p.m.	X						
9:50 p.m.				X			
10:30 p.m.			X				

Table 1 shows a limited number of intersections between DR1 and DR2 during prime time in 2005. This is remarkable because it should have been an easy task for the schedulers to coordinate the programme start times with only two television channels. However, as also apparent from Table 1, there was a well-established break in the range of programmes on both television channels every day at 8:00 p.m. This break happens nearly every day on most of DR’s television channels for the adult target groups throughout the time period of the study. This break does not lead up to any specific programme. On the contrary, different programmes within different genres are broadcast at 8:00 p.m. during the week. However, it is a tendency in the Danish television channel landscape to have a break at 8:00 p.m.

In 2010, DR’s portfolio featured more television channels – one for children, one 24-hour news update channel, and four “regular” television channels: DR1 and DR2 with mixed genre profiles, DR K (“K” for “culture”), and DR HD broadcasting in high definition. The news update channel ran as a separate offer with no firm schedule and will not be examined in this chapter. Nor will the children’s channels be included: DR’s one children’s channel in 2010 and two children’s channels in 2015 differed substantially from the rest of the channels in the portfolio regarding structure, transmission time, and prime time(s), owing to the target groups of the channels.

Table 2 shows the intersections between the four DR television channels in 2010. As also appears from Table 2, the increased number of channels caused more possibilities to establish points where viewers could switch channels. What the table does *not* show, however, is that the intersections in 2010 primarily involve two of the four channels (except for the break at 8:00 p.m.). During the weekends, some intersections involve three or even all four of the channels for the adult target group, but during the weekdays, the overall impression is that DR runs six separate channels with few possibilities to smoothly switch from one channel to another within the portfolio during prime time.

**Table 2.** Intersections in DR's television channel portfolio during week 46 in 2010

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
6:00 p.m.	X	X		X	X	X	X
6:30 p.m.	X				X	X	X
7:00 p.m.	X	X			X	X	X
7:30 p.m.	X	X	X	X		X	
8:00 p.m.	X	X	X	X	X	X	X
8:25 p.m.			X*				
8:30 p.m.		X		X			
8:45 p.m.	X						
8:50 p.m.					X		
9:00 p.m.	X		X		X		X
9:30 p.m.					X		X
9:35 p.m.				X			
9:50 p.m.	X						
10:20 p.m.					X*		
11:00 p.m.		X					
11:30 p.m.					X		
11:40 p.m.				X			

Comments: \*Two channels broadcast the same programme at the same time, one of them in HD quality

**Table 3.** Intersections in DR's television channel portfolio during week 46 in 2015

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
6:00 p.m.		X	X				
6:05 p.m.					X		
6:30 p.m.	X	X	X	X	X		X
7:00 p.m.							X
7:15 pm		X					
7:30 p.m.						X	
7:55 p.m.	X						
8:00 p.m.	X	X	X	X	X	X	X
8:30 p.m.			X	X			
8:45 p.m.	X	X					
9:00 p.m.			X		X	X	X
9:30 p.m.	X	X	X	X			
9:40 p.m.							X
10:30 p.m.	X	X	X	X			

The intersections in 2015 are characterised by a big difference when comparing weekdays and weekends. Unlike the structure in 2010, there are more intersections during the weekdays' prime time than in the weekend. And whereas most intersections in 2010 were before 8:00 p.m., Table 3 shows several intersections

later in the evening in 2015. Most importantly, many of the intersections in 2015 involve three or all four channels for adult viewers (two of the six television channels in DR's portfolio were children's channels at this point in time). Thus, viewers could choose between a greater number of channels in 2015 than in 2010.

This development is not least due to the strengthening of DR1 as the main channel in the portfolio. From 2012–2014 DR restructured its television channel portfolio in an attempt to stem declining viewing figures. The first step in this restructuring was to strengthen DR1 as the entry point for all DR offers. The main channel position comes to light in at least three aspects. First, if a programme is deemed important, it will be placed on DR1. Second, the channel has – by far – the largest budget.<sup>3</sup>

Third, and most relevant in this context, the programme schedule of DR1 is reflected in the structure of the range of programmes on the portfolio channels. Throughout the week, DR1 has a fixed structure: From 6:00 p.m.–8:00 p.m. and from 9:30 p.m.–midnight, the schedule is fixed with the same programme series or types of programmes every day Monday–Thursday. Between 8:00 p.m. and 9:30 p.m., genres vary over the course of the week, but each day has a fixed time structure that is repeated weekly. The fact that the structure is this fixed during the week offers two advantages: it makes it easy for the rest of the channels to adjust to this structure, and the recognisable structure cultivates routine use. This also facilitates DR1 strengthening its position in the competition with the other large Danish main channel – TV 2.

This development suggests that DR, from 2005 to 2015, has become more adept at running a cohesive and unified multichannel portfolio. The structure in the range of programmes of all DR's channels has been sharpened, and the scheduling has become a task that involves and considers the entire channel portfolio. Obviously, it is not enough to create intersections in the range of programmes, however. To make sure the channel portfolio in practice functions as a unified offer, DR must make sure the viewers know about the different programme options at a given time. We next examine the degree to which DR informs viewers about the content on other channels in the portfolio through programme promotions.

### *Cross-promotions*

As the analysis above showed, there is a break at almost all of DR's television channels at 8:00 p.m. This break gives viewers an opportunity to switch to another channel in DR's portfolio or to a competing television channel. Thus, DR must promote its programmes in order to retain, move, and guide the viewers. While some programme promotions are trailers, line-ups, or other visual presentations, some are articulated as a voice-over by the "channel voice".

In rare cases, this articulation is done by the programme host (Bruun, 2016; Ihlebæk et al., 2011, 2014; Johnson, 2013b; Stigel, 2004; Søndergaard, 1994; Van den Bulck & Enli, 2012). Several scholars (Bruun, 2016; Johnson, 2013b; Stigel, 2004) suggest two dimensions are especially important with regard to programme promotions: when a programme is being broadcast (time) and on which channel or platform (place) it is broadcast. In this chapter, I focus on place to shed light on the degree to which DR’s channels are linked via continuities. Bruun (2019: 88) defines continuities as a “television text that informs the viewers of upcoming content, holds their attention during these intermissions and even attracts new viewers for the upcoming content”. The sample for analysis is the programme promotions at 8:00 p.m. on DR’s television channels for the adult target groups during a week in 2005, 2010, and 2015.

Table 4 shows how many promotions were on DR1 at 8:00 p.m. during the analysed weeks and the duration of the continuity. It is clear that the overall number of promotions is fairly stable over the time period of investigation. However, the promotions have been made differently throughout the period, which is reflected in the duration of the promotions. In 2010, DR used line-ups – that is, visual overviews of the programmes to be broadcast – in combination with longer trailers. Therefore, the overall duration of the continuity is shorter in 2010 than in 2005 and 2015.

**Table 4.** Number and duration of programme promotions on DR1 at 8:00 p.m.

Year/week	Programme promotions per day	Duration
2005/40	4–10	1 minute, 55 seconds–2 minutes, 20 seconds
2010/46	5–9	1 minute, 35 seconds–1 minute, 55 seconds
2015/46	5–9	2 minutes, 10 seconds–2 minutes, 45 seconds

In 2005, the emphasis was on the programmes to be broadcast on DR1, and only a few programmes on DR2 and other platforms. In 2010, trailers for DR1’s own programmes still dominated the continuities, but DR used voice-overs during the roll of credits for ending programmes – an approach Johnson (2013b) and Ihlebæk and colleagues (2014) found in British and Norwegian contexts, respectively. One trailer promoted a DR radio channel, and four trailers were for general branding of the company.

In 2015, DR hardly used any line-ups, but while approximately four trailers per continuity were for programmes to be broadcast on the portfolio channels, only a few concerned programmes on DR1. Few trailers promoted other platforms during the week: the children’s web-universe, the DR concert hall, and a DR radio channel. Thus, the main channel functions as a display for the rest of the portfolio and DR’s different services.

For portfolio channels, the situation is the opposite. With few exceptions, the portfolio channels promote their own programmes with no exposure of the other channels' offers. Similarly, there were only a few promotions for other platforms on portfolio channels during the three investigated weeks. This practice is surprising from a competition perspective, especially because the viewers of portfolio channels, according to managing editor of DR's scheduling department, Henrik Birck, choose specific programmes to watch instead of just "watching TV" (personal interview with Henrik Birck, 18 March 2016). It would seem an obvious advantage to present viewers with the different offers across DR's portfolio and platforms.

From a pragmatic perspective, one can ask if it is relevant, for example, that the viewer of the culture channel DR K is informed about an upcoming programme on the youth channel DR3. The answer could very well be that it is not, because the channels' target groups have too little in common. However, in light of DR's public service task, the lack of cross-promotions (even among diverse topic areas) is problematic: When viewers of the narrowly profiled portfolio channels are kept on each channel instead of being exposed to the programme offer of the entire channel portfolio, the channels come across as separate entities. As pointed out earlier, DR's diverse and versatile programme output is to be found horizontally *across* the channel portfolio and not in a single channel. When viewers of the portfolio channels are not informed about the offers in other channels, the public service media organisation does not stimulate a diversified selection of programmes. Additionally, it is more difficult to legitimise DR's role as a public service institution if viewers are retained on narrowly profiled channels and are not (necessarily) exposed to genres that are deemed important for the wellbeing of the society.

Beyond these two points, a potential consequence of the lack of cross-promotions and the viewers' isolation on narrowly profiled portfolio channels may be that a shared, national debate is undermined by niche groups and small communities of interest. The following section will elaborate on this challenge.

## One mixed channel or a segmented portfolio – which is “best” for public service?

As Light (2004: 21) wrote, “with a greater choice of channels, the likelihood is that audiences will fragment across them, reducing any sense of a shared space and a shared moment” (see also Keane, 1995; Rasmussen, 2016). By running a multichannel portfolio – in the interests of competition and individualised media usage – DR potentially contributes to a fragmentation of the public.

Two points should be emphasised. First, this is a theoretical consideration. Only comprehensive empirical studies can document the actual media usage



in the multichannel system (and such studies have not yet been carried out in a Danish context). Second, it is important to emphasise that the fragmentation and individualisation is not only the work of DR. The entire media system is developing this way, not least the growing number of video on-demand subscription services. But one could argue that as a public service media organisation, DR should counteract this tendency and programme one or a few television channels with mixed genre output, as Scannell (1989) suggested. However, there are important reasons for DR to follow the general tendency of the media market.

When DR2 was established in 1996, a key argument for the channel was that DR needed a better position in the competition against the other players in the television market. Although DR (for economic reasons and as a consequence of its specific tasks) does not need to compete, it is important that the public service media organisation has a high reach. DR can only facilitate a collective dialogue in society if it is in contact with a great part of the population (Nissen, 2006). With targeted profiles, the multichannel portfolio ensures that DR has a high reach and share. Should DR decide to run but one single channel with a mixed programme output, it is reasonable to expect that the viewers would seek the more targeted offers somewhere else, in line with how the media usage and the media landscape in general have developed.

The strategy of the multi-channel portfolio DR has chosen corresponds to what Jakubowicz argues as the best way to understand universality of content in the age of channel proliferation:

Universality of content can no longer be understood as one-size-fits-all programming on one or more broadcast channels, but as both universality of basic supply on generalist channels (including mass-appeal, entertainment programming), which will be central to what public service broadcasters offer to the public, and universality across the full portfolio of services, some of them specialized or tailored for specific audiences, adding up to a more extended and comprehensive range of services. (Jakubowicz, 2006: 13)

Although DR segments the population across a number of portfolio channels, the public service media institution operates the main channel, DR1, as a broad and intentionally unifying channel. The main channel functions as a counterweight to the potential risk of fragmentation that a multichannel portfolio contributes to. By operating a main channel that is prioritised economically and in scheduling, the channel can achieve a high reach and share, which positions DR as an important unifying institution in Danish society. Had the public service media organisation only offered a number of specialised channels, it would be more difficult to legitimate the continued need for DR as a public service alternative to commercial offers.

Similarly, a single channel with a mixed-genre profile would be challenged since the viewers most likely would turn to other, more specialised offers. With

a channel portfolio that contains both a widely profiled main channel and a series of channels that target specific segments with content – that otherwise is sparsely represented in the Danish media landscape – DR maintains its role as an important alternative to private commercial media. The combination of broad and narrow channel profiles ensures that DR can provide universality in content and across audiences. DR can simultaneously address the public as a whole and remain in contact with different target groups.

### A smaller DR in the future

This chapter has shed light on the development of DR's television activities from 2005 to 2015, where DR extended its television channel portfolio from a few to many channels. During this decade, DR has become more adept at operating a channel portfolio as scheduling – to a large extent – increasingly unites the channels to comprise a joint offer. With its multichannel strategy, DR has achieved high reach within the population while providing a universal service in both access and content dimensions. However, while this chapter was being written, the conditions of DR's television activities changed.

In the spring of 2018, the liberalist-leaning Danish government decided to cut DR's income by 20 per cent between 2019 and 2023, and to reduce the number of DR linear television channels (The Ministry of Culture, 2018). The reason for this decision is that the parties behind the agreement believe DR is distorting the competition on the Danish media market. In September 2018, DR and the Danish Minister for Culture signed a public service contract in which it was agreed that DR will close three of its six linear television channels in 2020.<sup>4</sup> The remaining channel portfolio will consist of one main channel with content that aims at uniting the population and two channels with narrower profiles: one with a combination of society and culture programmes and the other a continuation of the current DR Ramasjang for children aged three–six (DR, 2018a).

The changes suggest an end to the multichannel strategy and a significant downsizing of the main public service media organisation in Denmark. It will also be a radical change for viewers and for the larger Danish media market. Of interest in this context is how the decision to reduce the number of linear television channels by 50 per cent will likely affect DR's prospects of providing a universal service.

DR's linear television service will still be a universal service in the understanding of universality as a matter of access and – with the broad main channel – mass appeal. But as three channels will be closed, DR will not have the same possibilities to address minorities and niche audiences with linear content. When the plans were made public in September 2018, Director General of DR Maria

Rørbye Rønn said that she expects DR will lose viewers as a consequence of the downsizing. If this happens, the future DR will be less inclusive and thereby harder to legitimate as a public institution for the entire Danish population.

It should be noted that part of the agreement between DR and the Minister for Culture intends that DR's online streaming service (DRTV) will become a more extensive service with more unique content (DR, 2018a). This decision is in line with the general development of media use in Denmark where an increasing proportion of people, especially among the younger age groups, is moving from linear television channels to on-demand services (The Agency for Palaces and Culture, 2019). Likewise, it is interesting to note how other Scandinavian public service media organisations have fewer television channels than DR and yet obtain a better daily reach. In 2017, Finland's YLE had four television channels and obtained a daily reach of 68 per cent. Norway's NRK had four channel profiles distributed on three channels with a reach of 66 per cent. Sweden's SVT had five channels and a reach of 62 per cent. Despite having six channels, DR obtained the lowest daily reach of 61 per cent (Nordicom, n.d.). Thus, a high number of linear channels is not necessarily tantamount to ensuring high reach.

With a combination of a broad main channel, two specialised channels, and an online streaming service, DR's television service may well live up to Jakubowicz's (2006: 13) description of universality as having a "presence on all relevant media and platforms with significant penetration, but also the ability to deliver a 'personalized public service' in the 'pull', online and on-demand environment". However, DR's online streaming service DRTV will, with the use of algorithms, cater to personalised tastes. This, combined with the future smaller linear channel portfolio, means that DR must reinterpret and restructure how it carries out the public service mission going forward. In today's increasingly more individualised media landscape it is of utmost importance that DR continue to curate its content to stimulate a diverse programme consumption and ensure the population has knowledge and experiences in common.

## Notes

1. For 2005, week 40 is investigated, while 2010 and 2015 are represented by week 46. This is due to limitations in the data. Week 46 is regarded as "the news week" in Denmark; that is, a week where no extraordinary events usually happen, and the collection of data is intensified by the Royal Danish Library. However, in week 46 in 2005 there was a municipal election in Denmark, which influenced the range of programmes of DR's two television channels. Because of flaws in the official archiving systems, DR's streaming service was not archived for most of the autumn in 2015, so the archiving was done manually by the author. This was possible in week 46. To represent 2010, week 46 was chosen. This way, DR's streaming service could be compared most equally. The streaming service did not exist in 2005.
2. The total amount of broadcast hours on DR's television channels rose from about 10,500 hours in 2005 to about 43,300 hours in 2015.
3. DR spent about DKK 1,400 million – or 60 per cent of the television expenses – on the main channel DR1 in 2018. DR2 was the second most expensive channel with 16 per cent of the

expenses, followed by DR3 with 8 per cent. DR spent about 8 per cent of the television expenses on DR K, and about 6 per cent on DR Ultra and DR Ramasjang (DR, 2019: 52).

4. In June 2019, a new government was elected in Denmark. In the fall of 2020, the media political agreement is expected to be renegotiated since several parties in the Danish Parliament wish to reduce the cutbacks of DR. The current government has stated that the decision to reduce the number of linear television channels will not be changed.

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